



Destination Management

Powered by The State of the American Traveler

Tuesday, November 18, 2025

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With You Today



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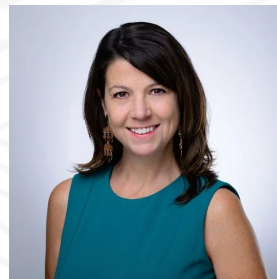
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Agenda

1. Current Travel Sentiment
2. Destination Management Insights
3. Panel Discussion: Community Engagement
4. Q&A



Research and Webinar Resources

Research, slides and other resources will be available at:

www.milespartnership.com/SAT

www.futurepartners.com



Quarterly Research Powered by of The
State of the American Traveler



The background of the slide is a solid blue color with a white line pattern that resembles a city street map or a network of roads. The lines are thin and vary in thickness, creating a complex, interconnected web across the entire surface.

Research and Insights

Travel Sentiment and Destination Management



The State of the American Traveler: Destination Management Edition

Opportunity powered by *Insight*

Future Partners

Shaping strategies for travel brands and
tourism leaders that capture *hearts*,
minds and *market share*

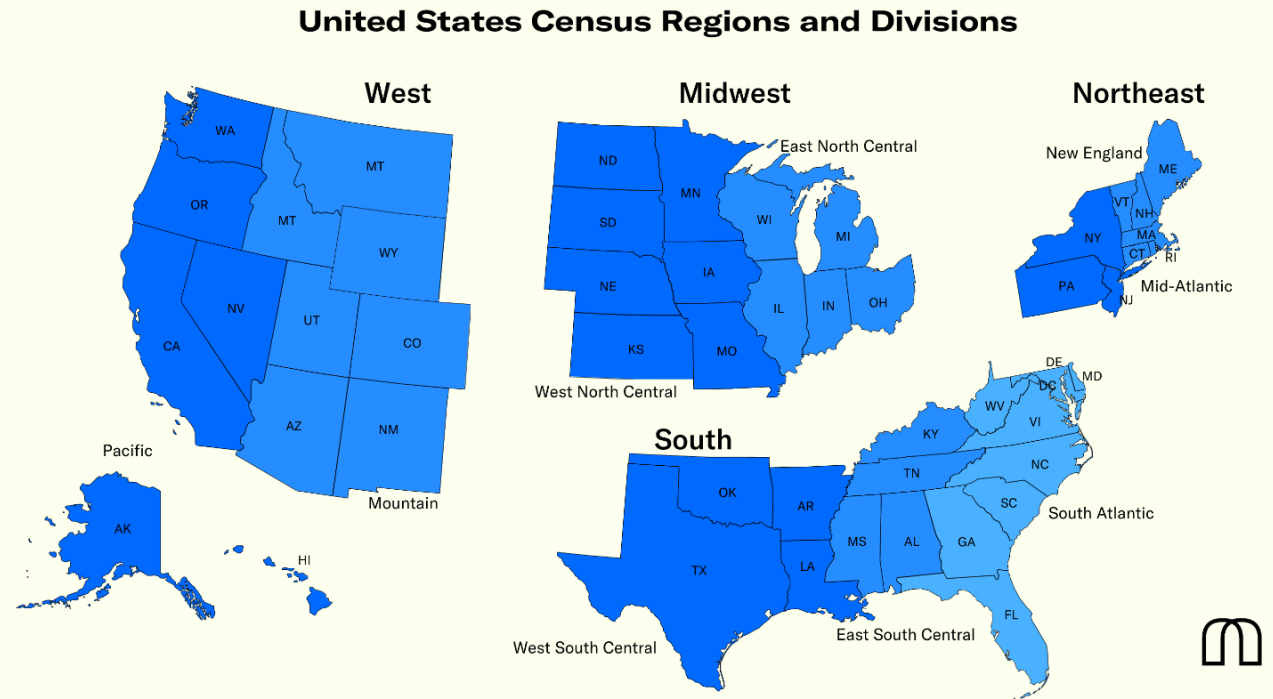
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*Bringing the future of travel
within reach*

Future Partners

Methodology

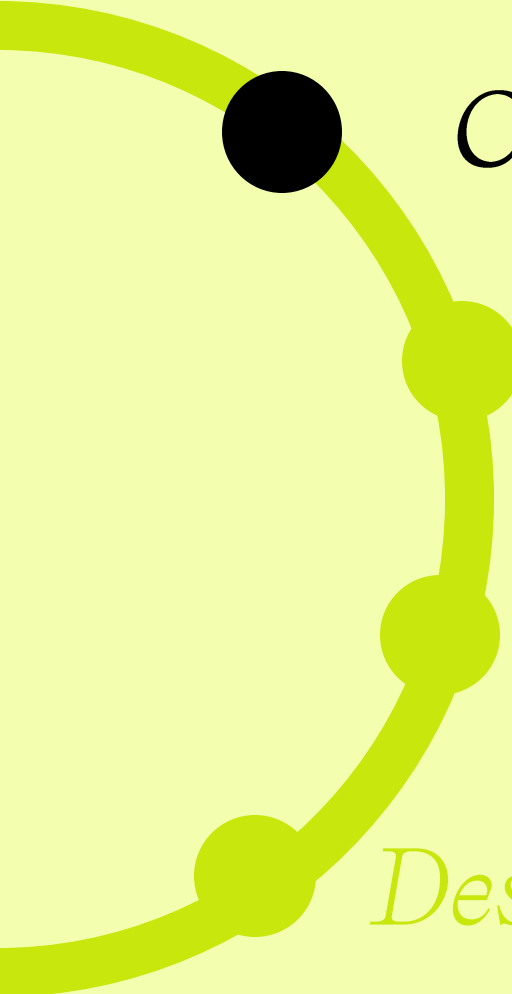
- Monthly tracking survey
- Representative sample of adult American travelers in each of four U.S. regions
- Tracks traveler sentiment to generate insights into domestic travel trends
- 4,000+ fully completed surveys collected each wave.
- Survey collected **October 16-26, 2025**
- Confidence interval of +/- 1.55%
- Data is weighted to reflect the actual population of each region



Today's Agenda

- *Current Travel Sentiment*
- *Sustainable Travel Trends*
- *Resident Sentiment & Tourism Impacts*
- *Destination Stewardship*

Today's Agenda



Current Travel Sentiment

Sustainable Travel Trends

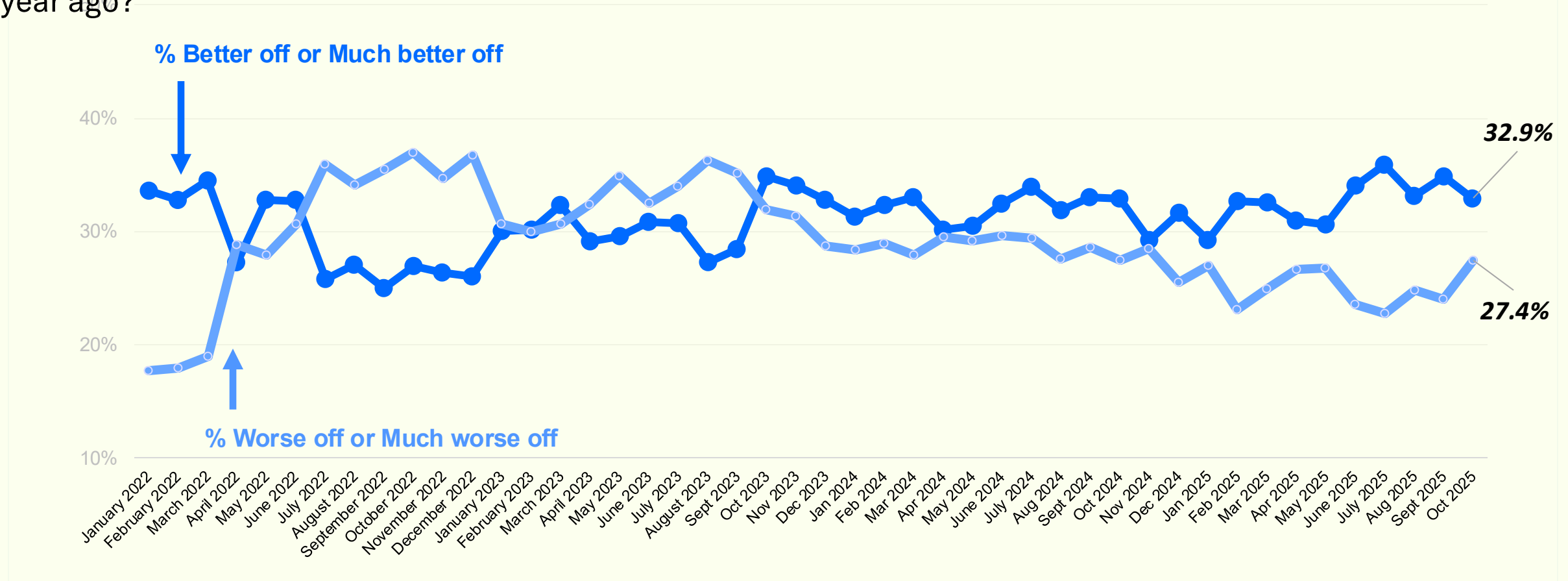
Resident Sentiment & Tourism Impacts

Destination Stewardship

Americans remain steady in their financial outlook — but growing caution could temper future travel spending. While most households still plan to travel in the coming year, ongoing economic worries continue to push a more watchful mindset. Meanwhile, strong interest in mega-events such as America 250 and the 2026 FIFA World Cup offers clear evidence of optimism for the year ahead.

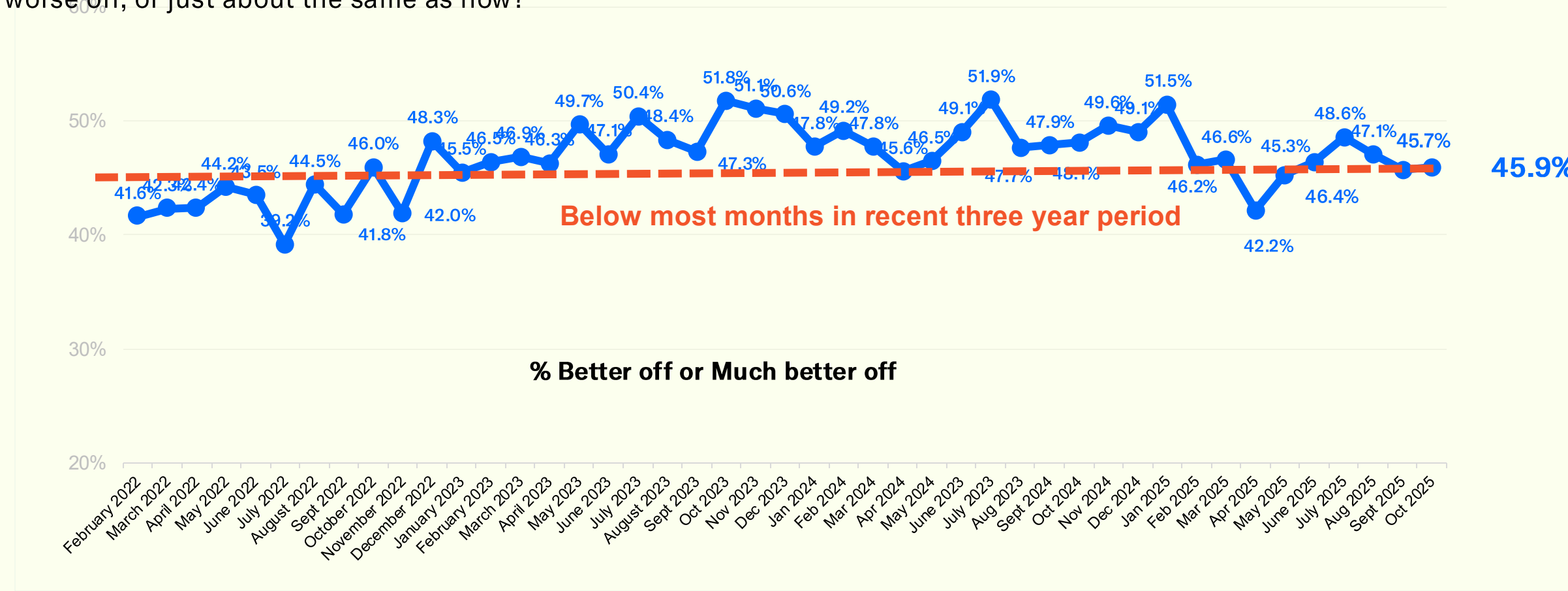
A Minor Mood Shift: Travelers Feeling a Little Less Flush

Question: Would you say that you (and your household) are better off or worse off financially than you were a year ago?



Traveler Financial Expectations Flat This Month

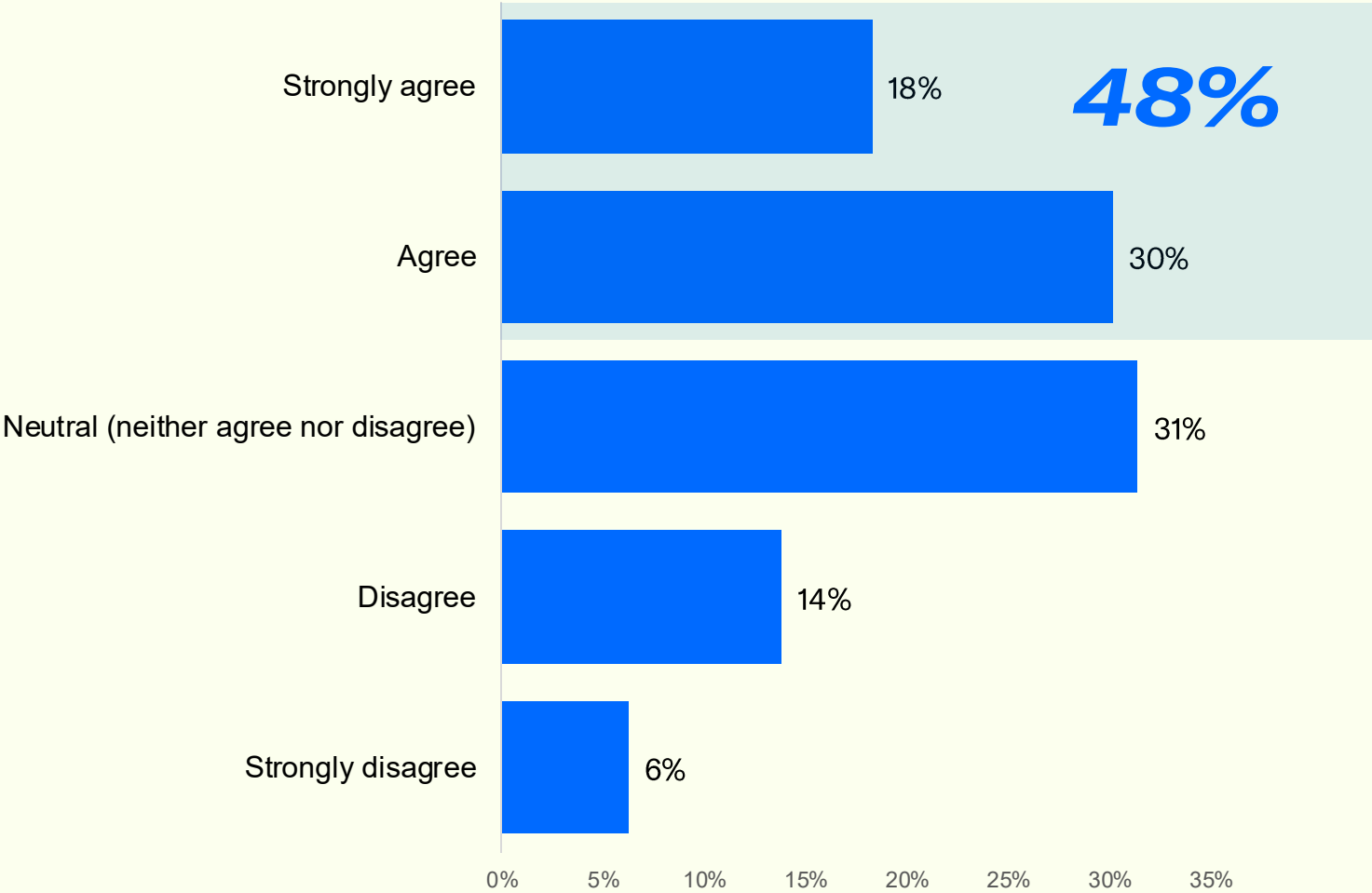
Question: LOOKING FORWARD - Do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now?



Currently, nearly half of Americans expect a near-term recession.

Question:

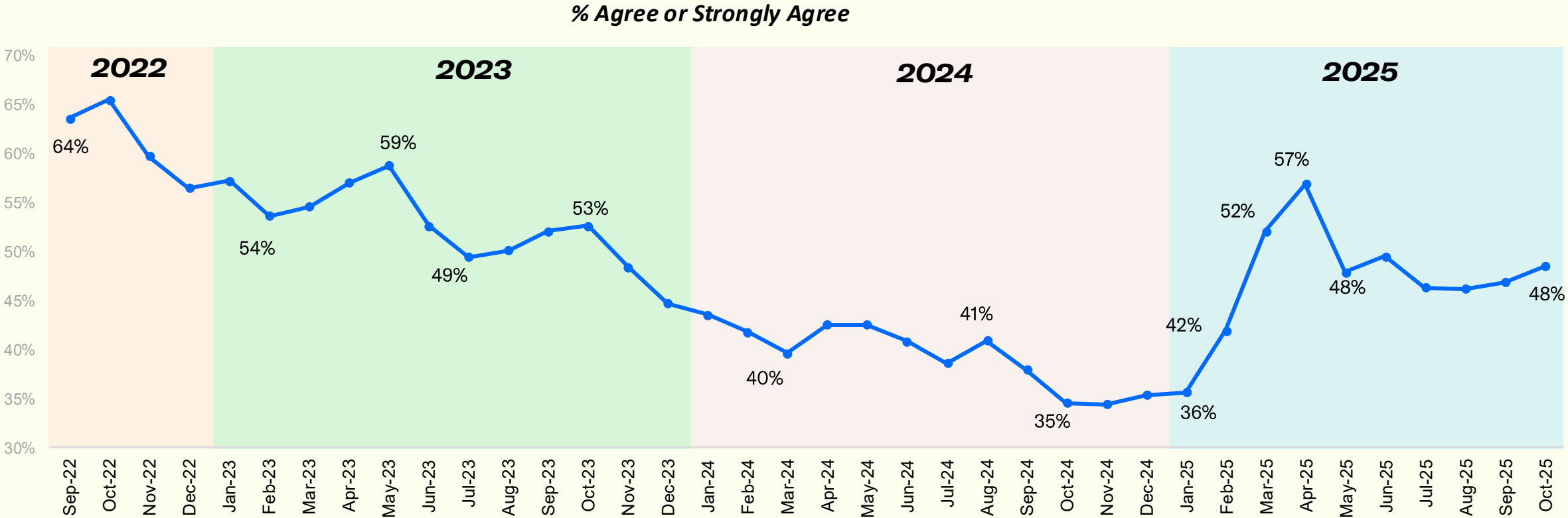
I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



Recession fears have abated somewhat since this past spring, but remain elevated compared to 2024.

Question:

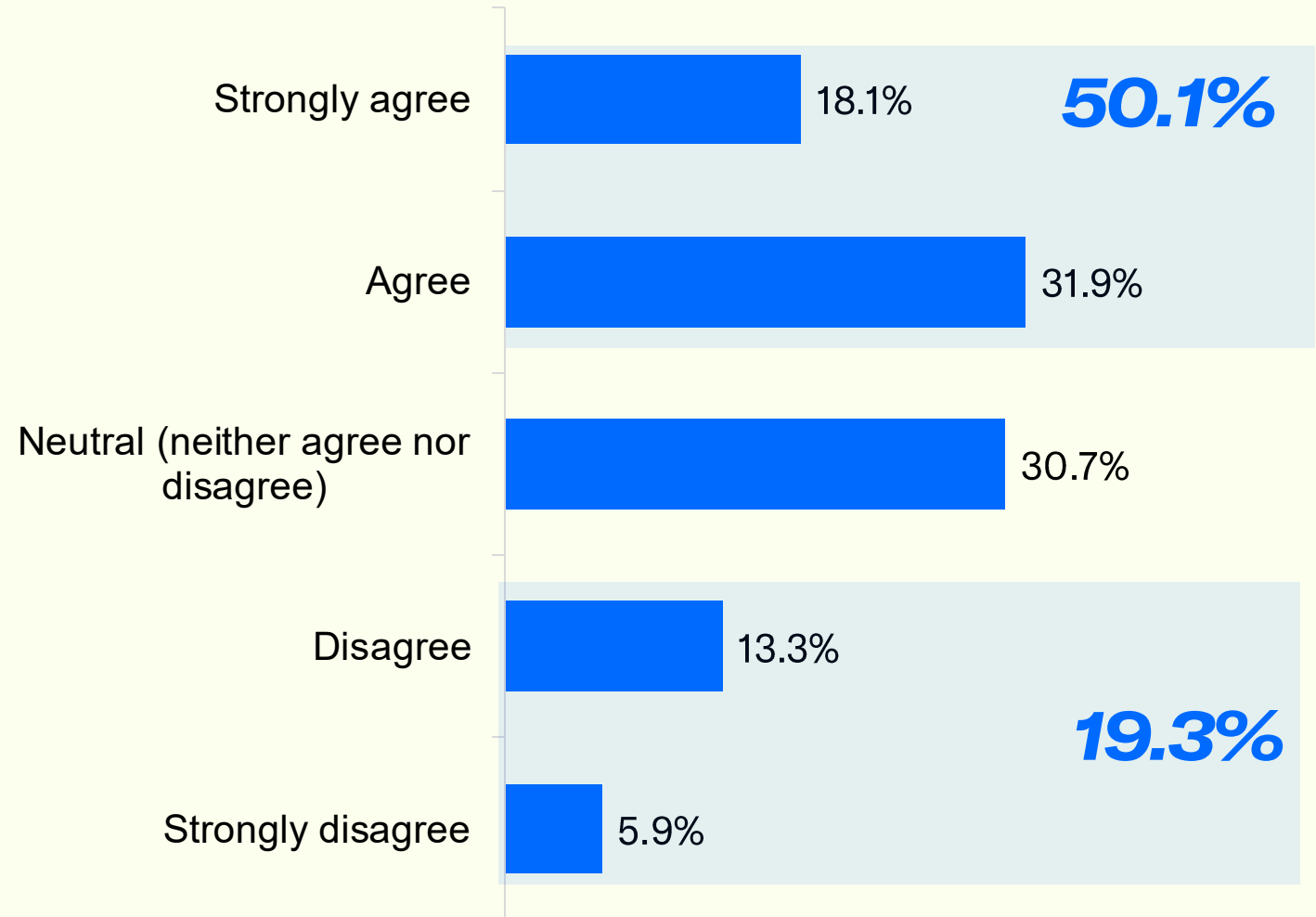
I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



Recession Jitters Lead to More Careful Travel Spending

Question:

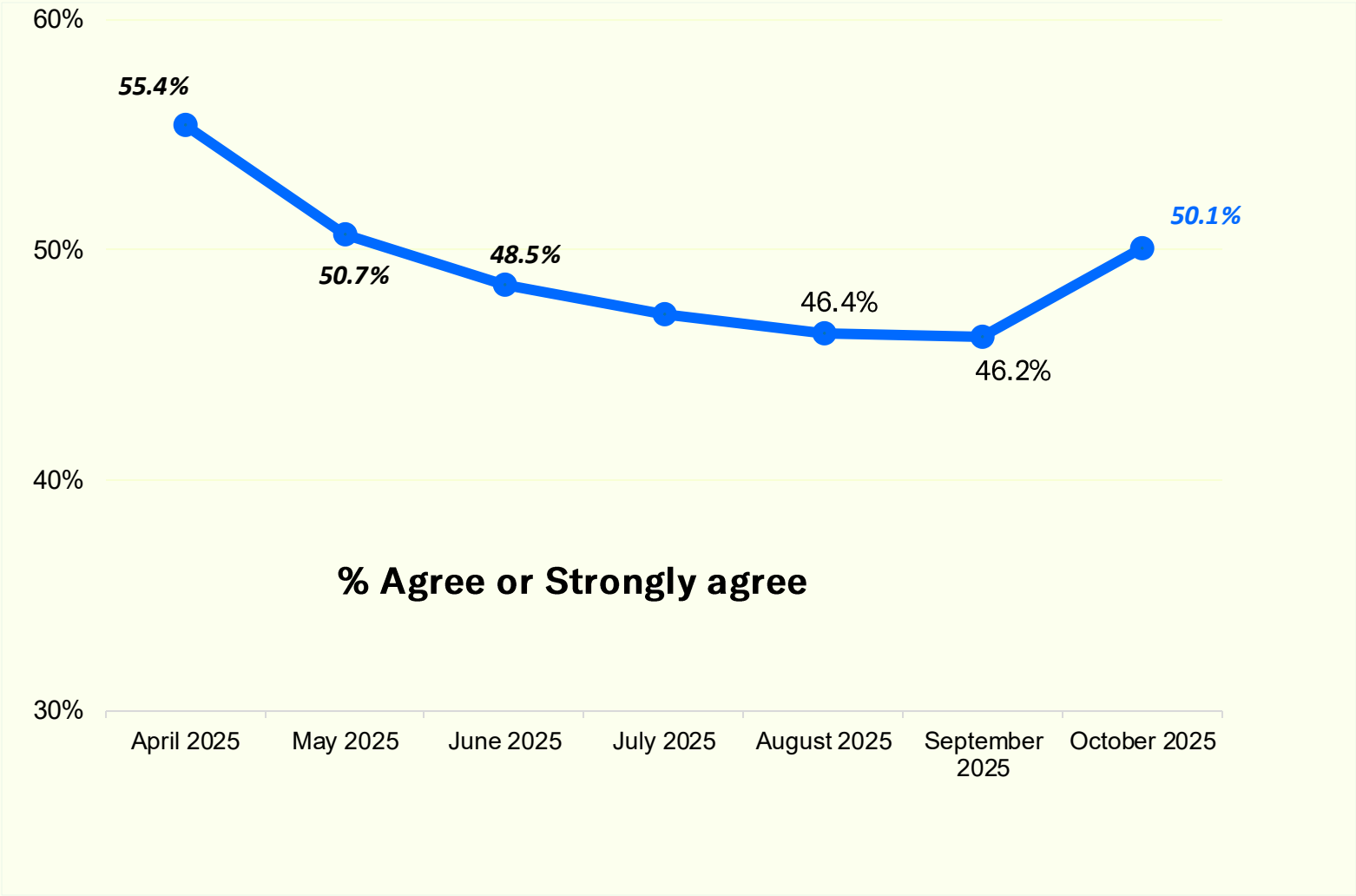
Right now, I am being careful with my money because I'm concerned about an upcoming recession.



Recession Jitters Lead to More Careful Travel Spending

Question:

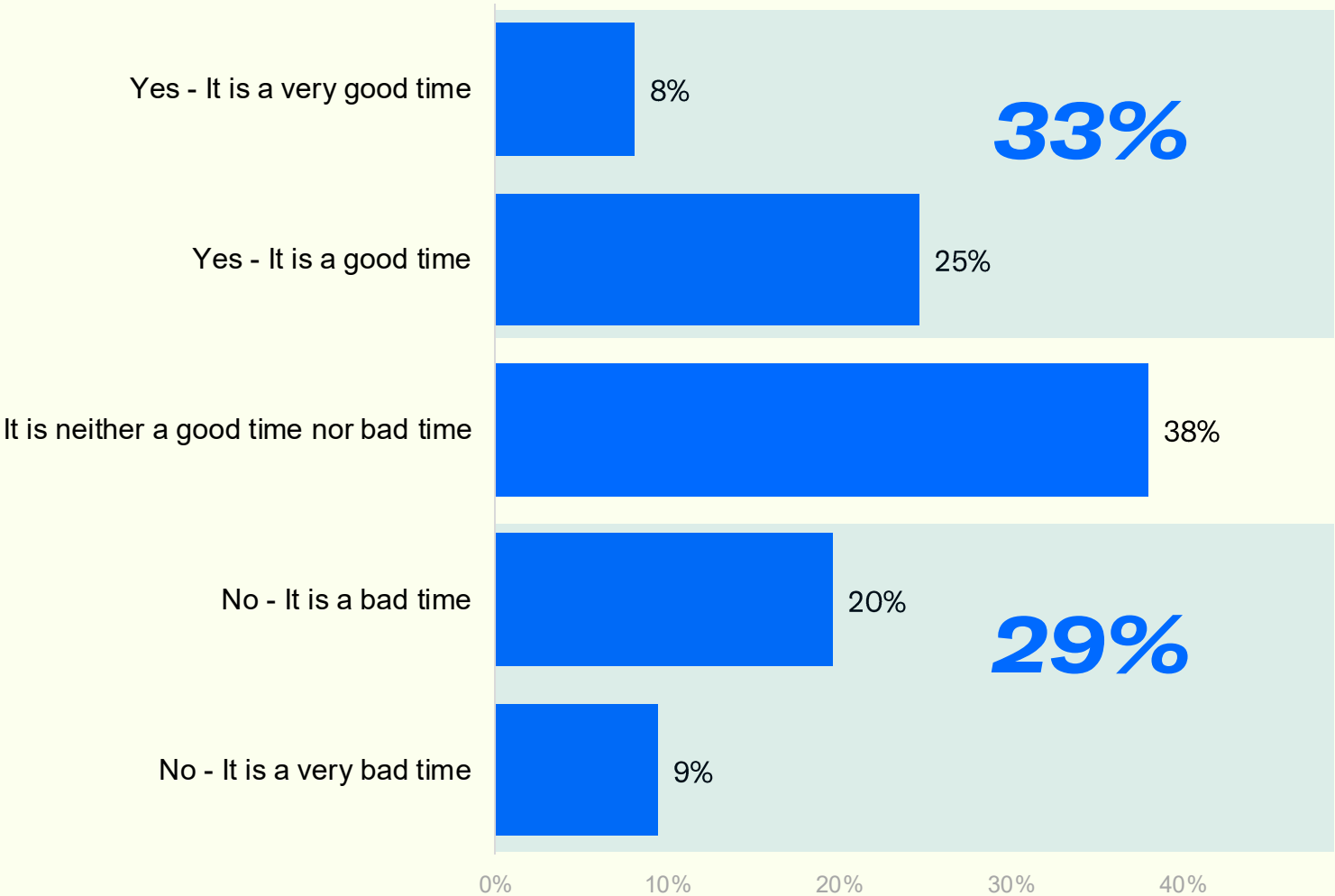
Right now, I am being careful with my money because I'm concerned about an upcoming recession.



Opinions on whether now is a good time to spend on leisure travel remains split.

Question:

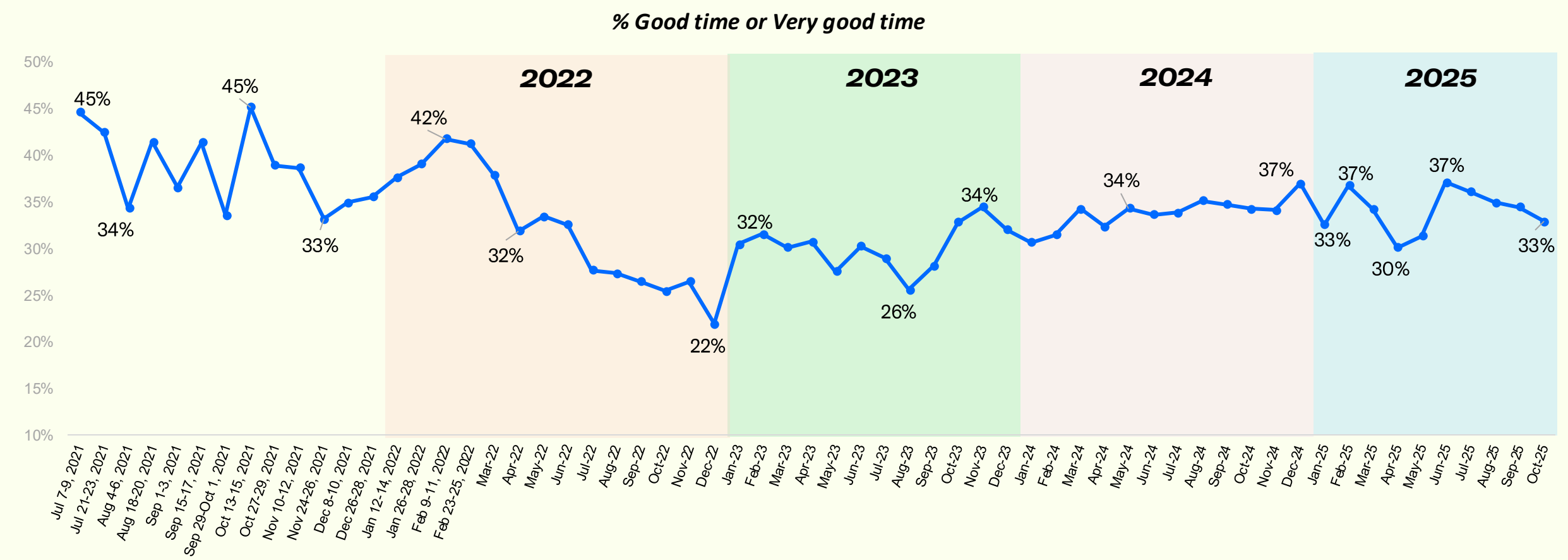
Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel? (Select one)



After holding steady through much of 2024, sentiment around this metric has fluctuated this year.

Question:

Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel? (Select one)

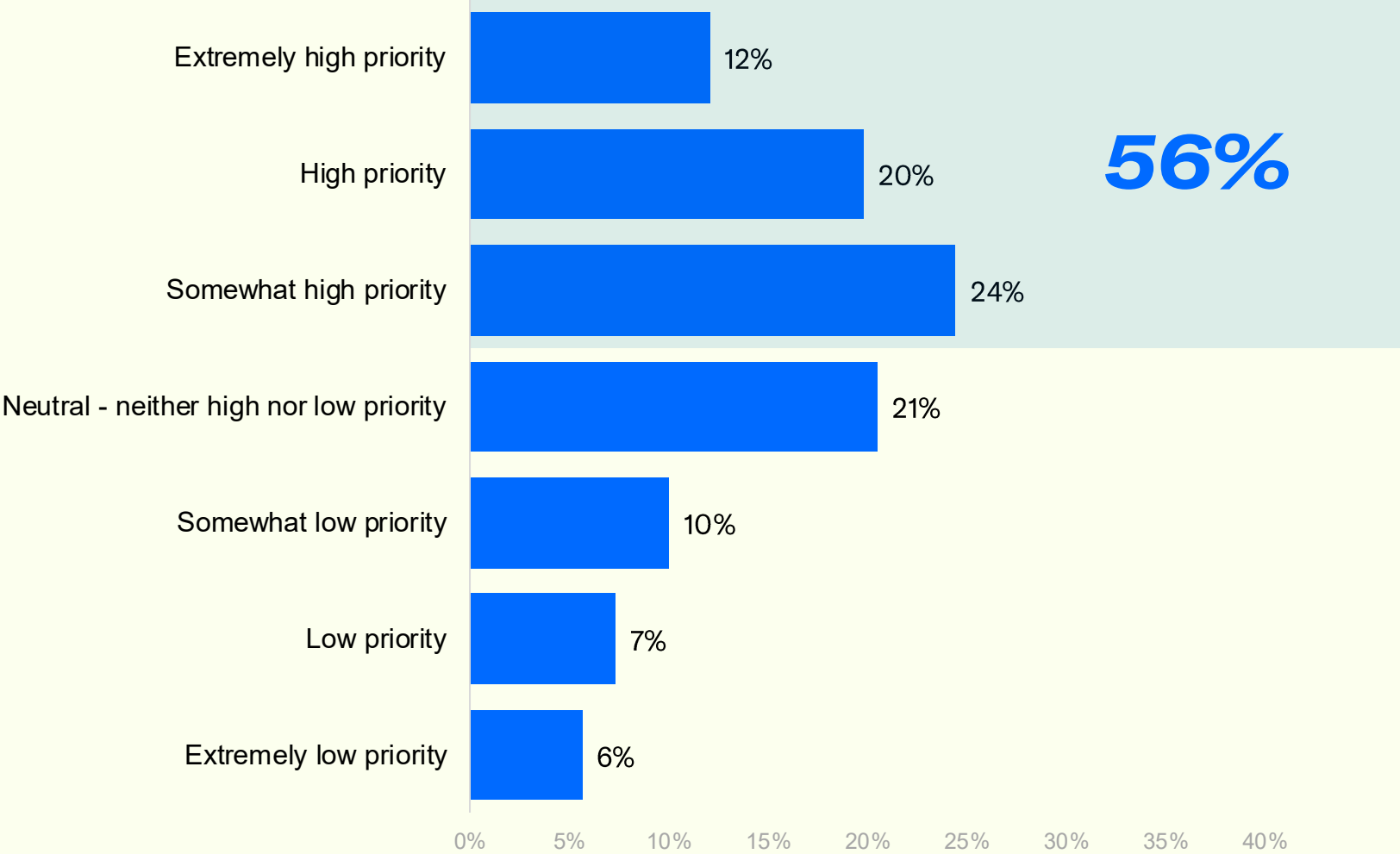


Most American travelers are still prioritizing leisure travel spending in the short-term.

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. (Select one)

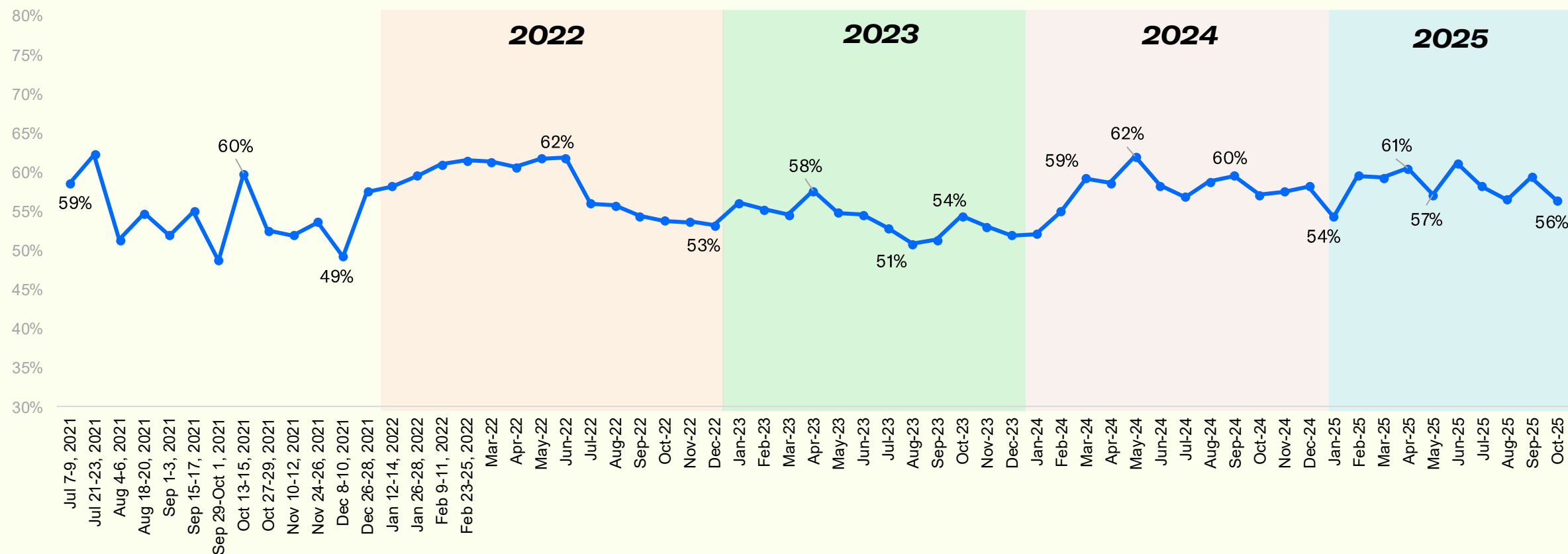
Leisure travel will be a(n) _____.



However, this has also seen more fluctuations compared to previous years.

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) _____.

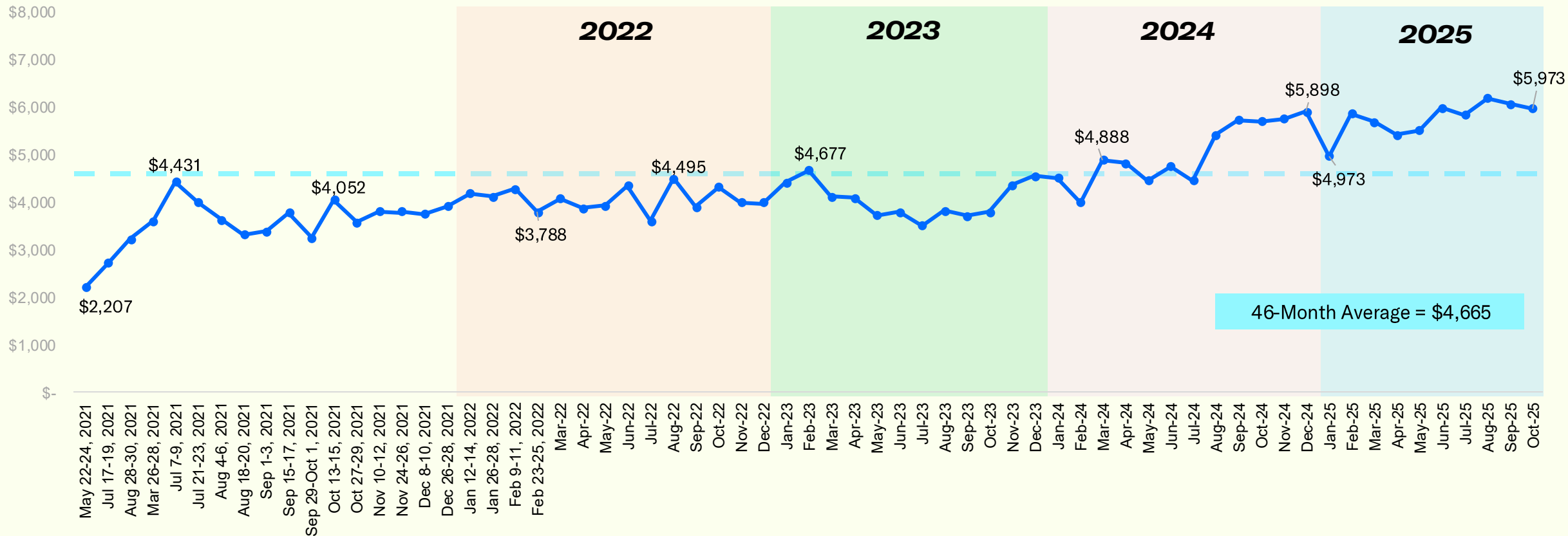
% Leisure Travel as a High Budget Priority



Annual travel budgets remain high but have not seen significant increases this year.

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): _____

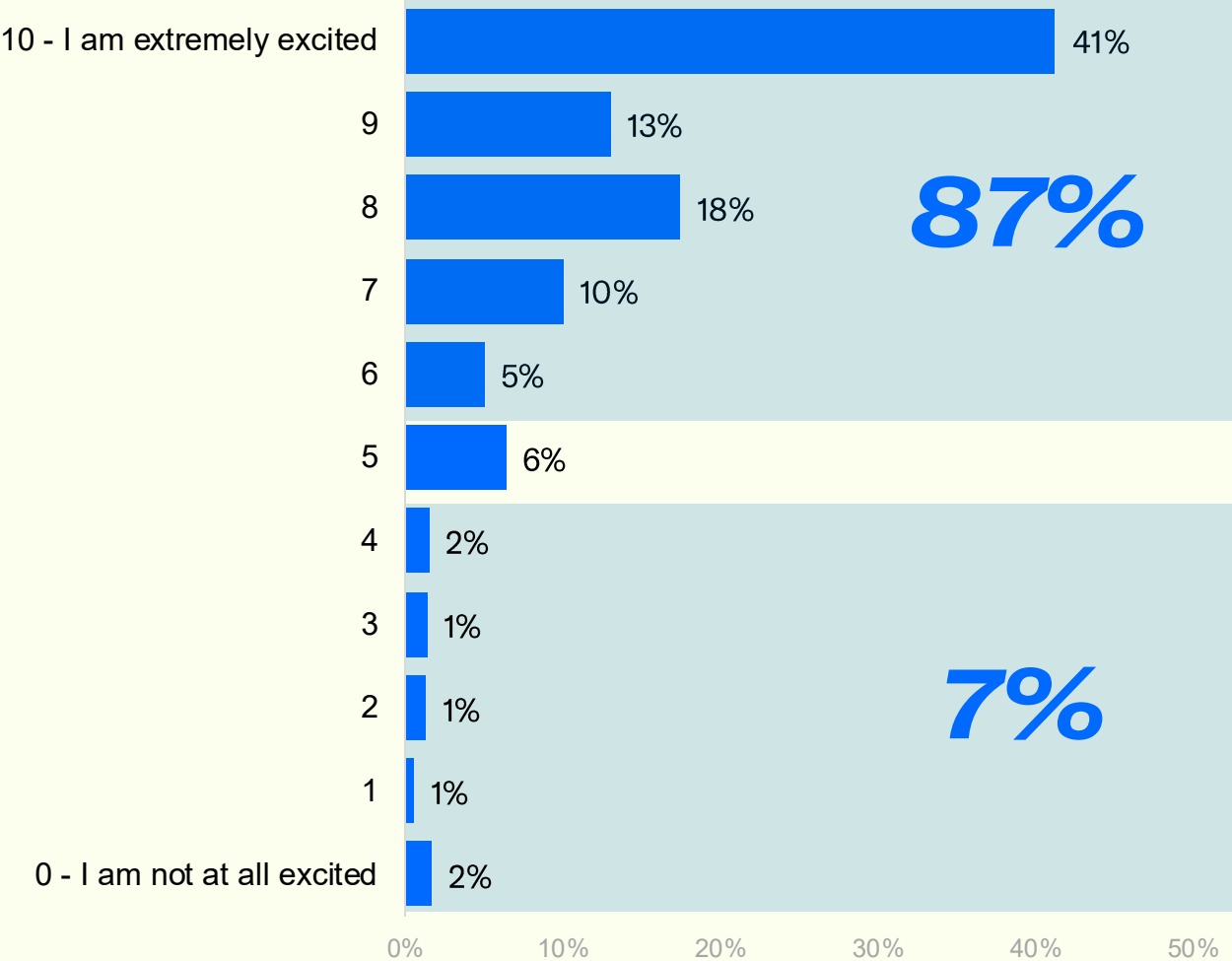
Average Maximum Annual Travel Budget



Excitement for travel remains high.

Question:

Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?
(Please answer using the 11-point scale below)

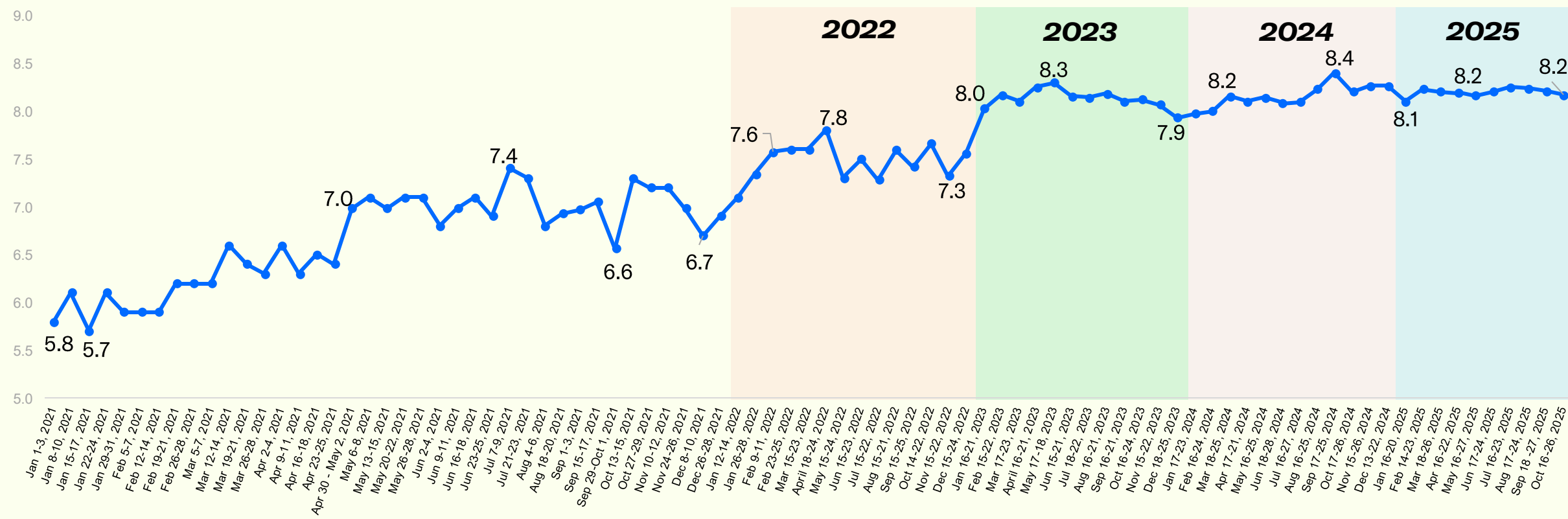


This has remained consistent throughout 2025.

Question:

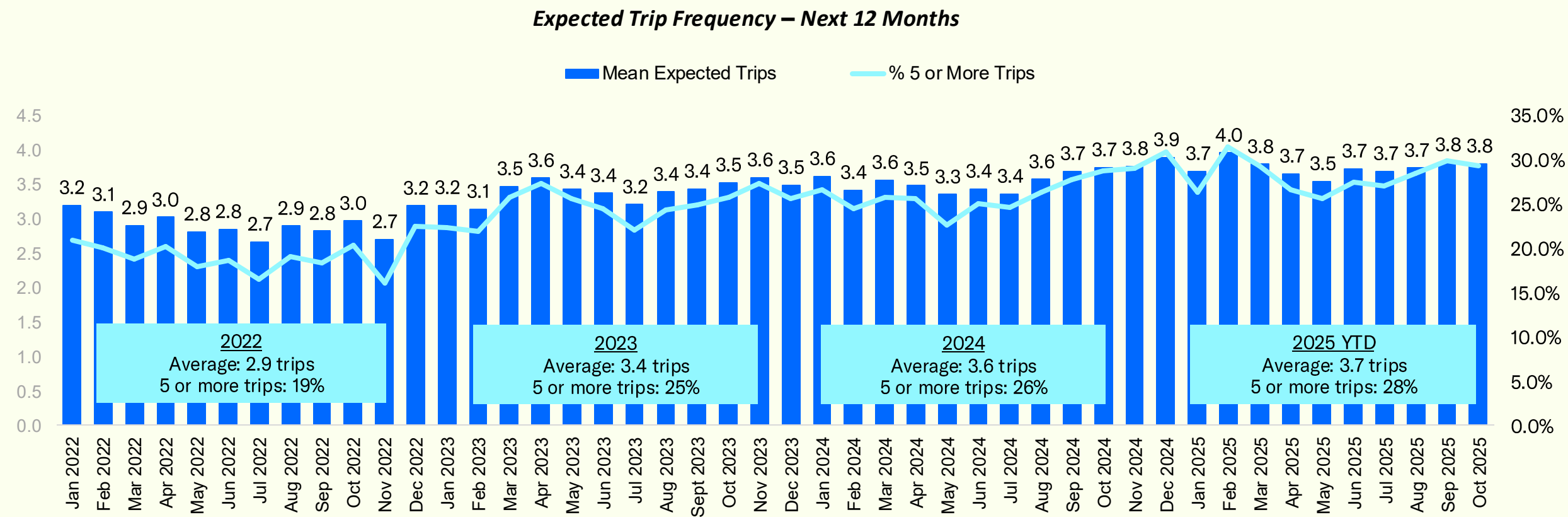
Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS? (Please answer using the 11-point scale below)

Mean Score (0 - 10-point scale)



Trip frequency has gradually increased in the years following the pandemic.

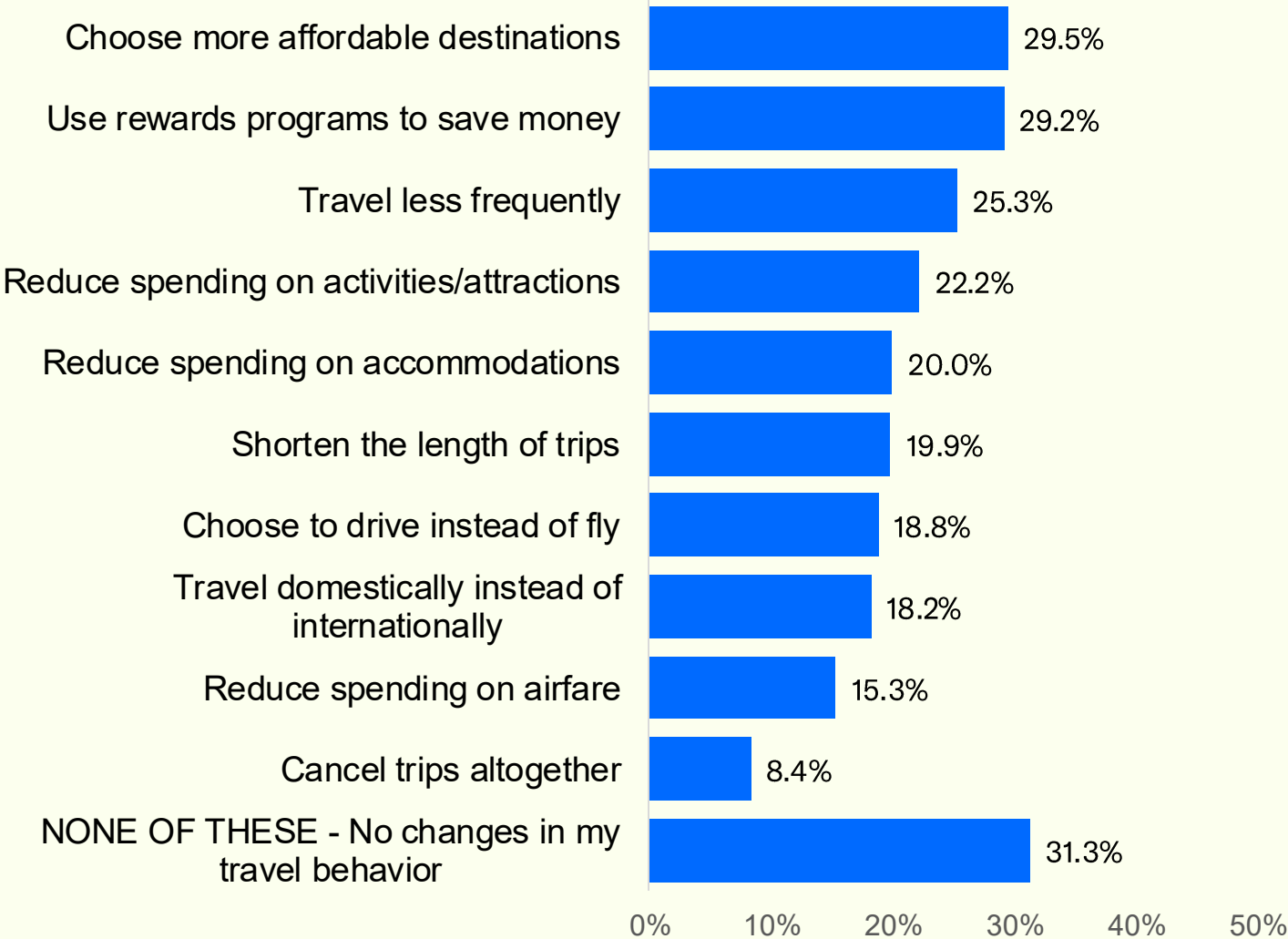
Question: IN TOTAL, how many leisure trips (of 50 miles or more from your home) do you expect to take in the NEXT TWELVE (12) MONTHS? (Select one)



Economic Concerns will Impact Travel Choices

Question: Have concerns about the economy led you to change your thinking about travel or travel plans for the NEXT SIX (6) MONTHS? If so, please describe how below.

Due specifically to concerns about the economy, I expect to _____.



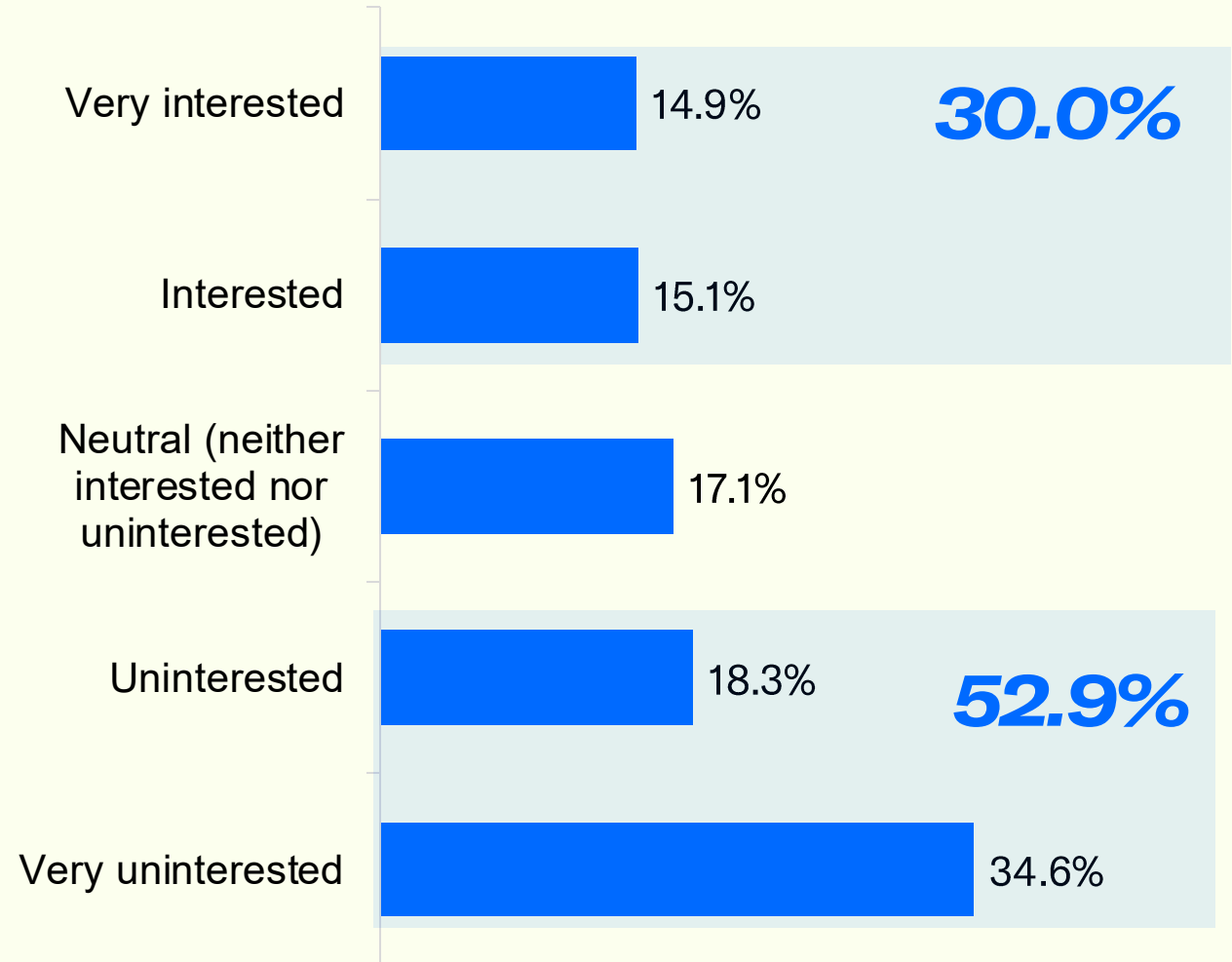
Upcoming Major Events Travel



About 1-in-3 American Travelers Are Interested in Traveling to Enjoy the World Cup

Question:

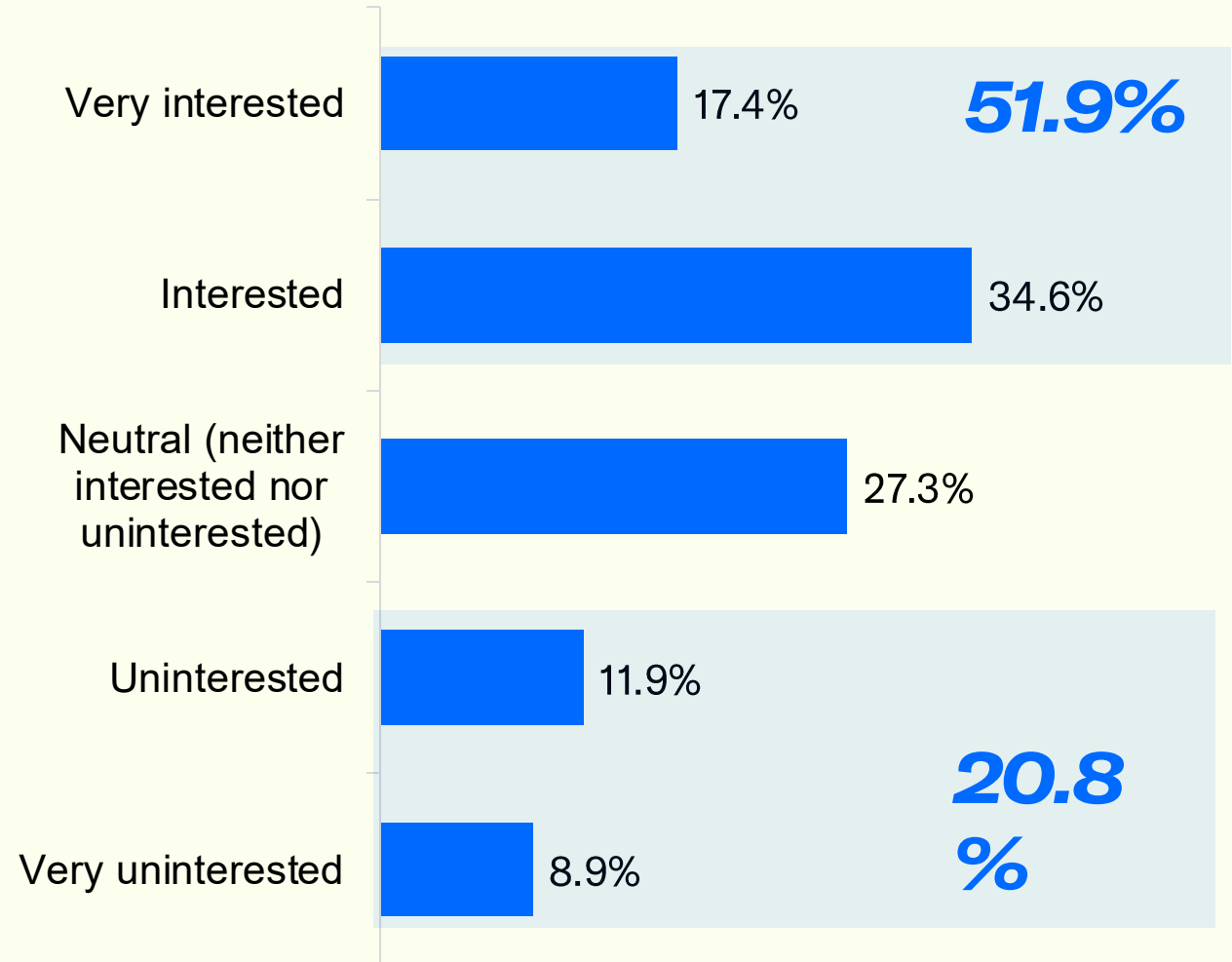
How interested would you be in traveling to enjoy the 2026 FIFA World Cup?



Interest In the Route 66 Anniversary is High

Question:

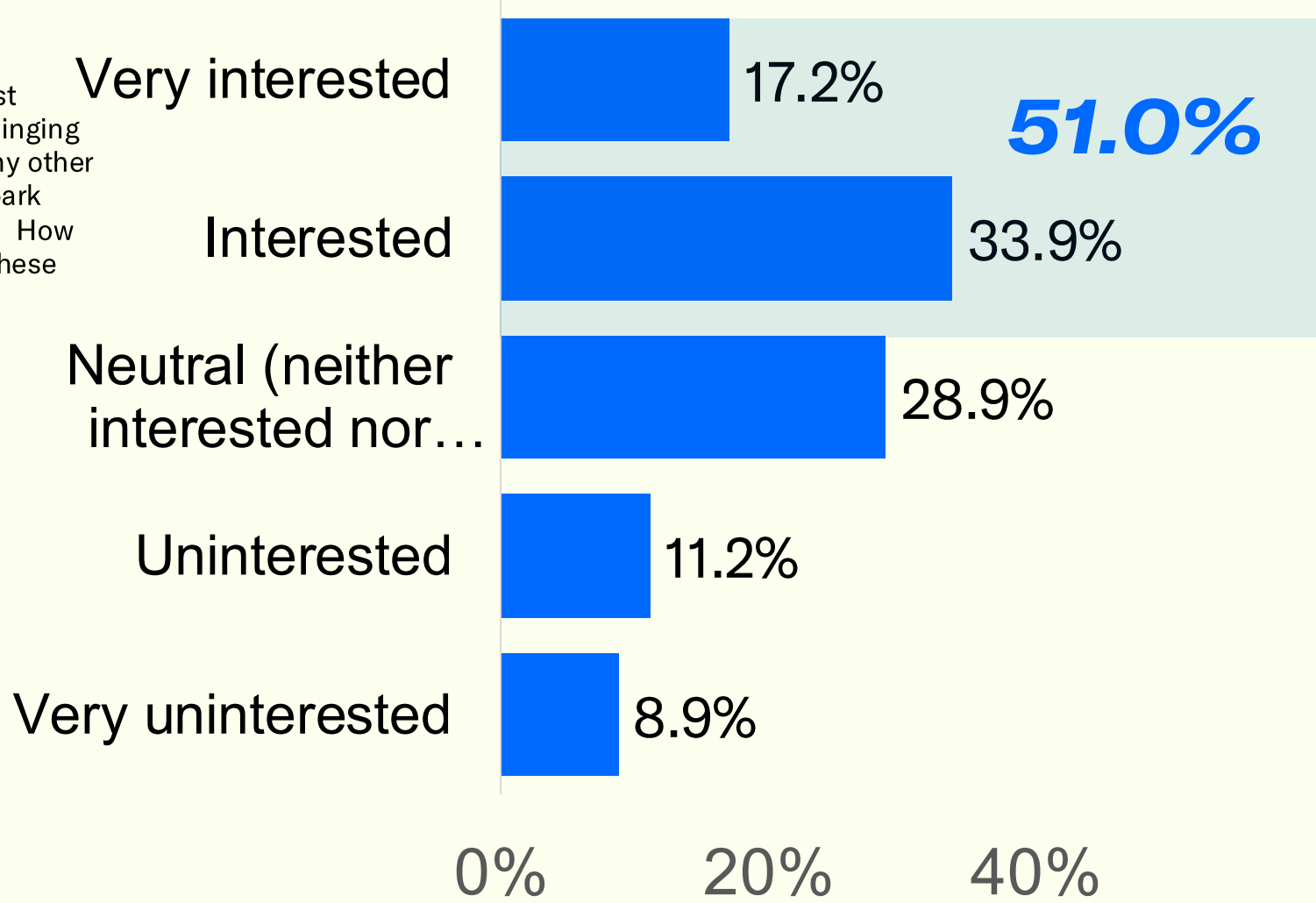
How interested would you be in traveling to enjoy these (Route 66 Anniversary) opportunities?



Over half are interested in travel for America 250 Events

Question:

In 2026, "America 250" will be a coast-to-coast celebration of our nation's 250th birthday—bringing together festivals, parades, concerts, and many other experiences that honor America's past and spark pride and imagination for the next 250 years. How interested would you be in traveling to enjoy these America 250 celebrations?



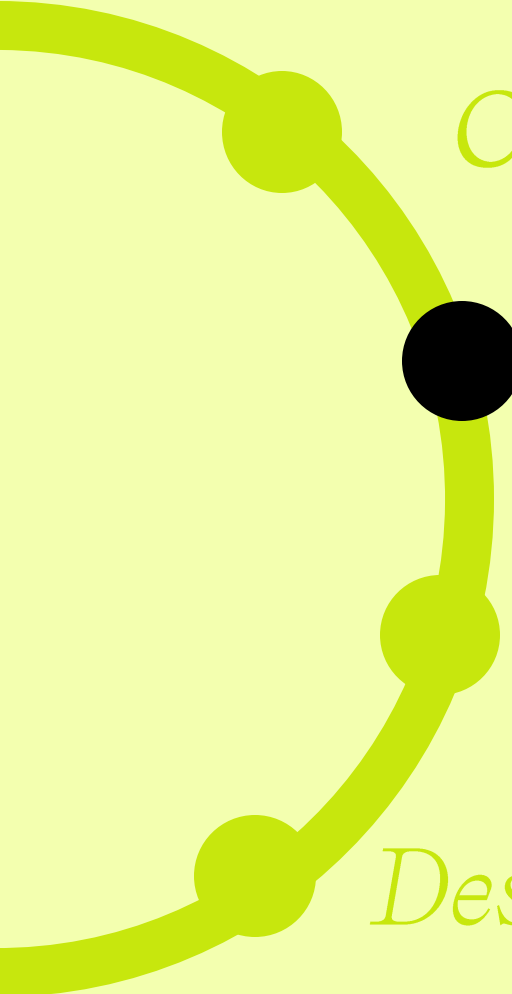
“What’s changed most about how you think of travel in the last five years?”



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**We Asked Leisure
Travelers...**

Today's Agenda



Current Travel Sentiment

Sustainable Travel Trends

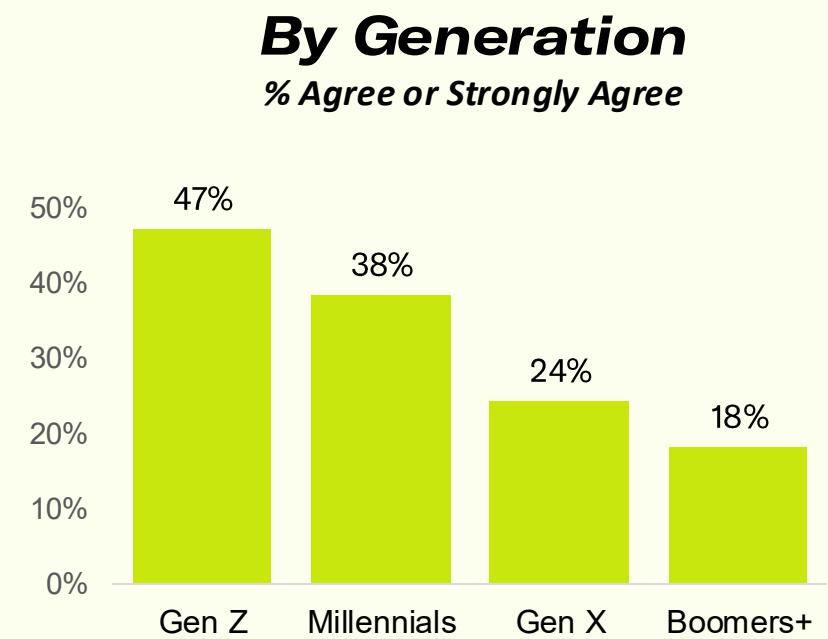
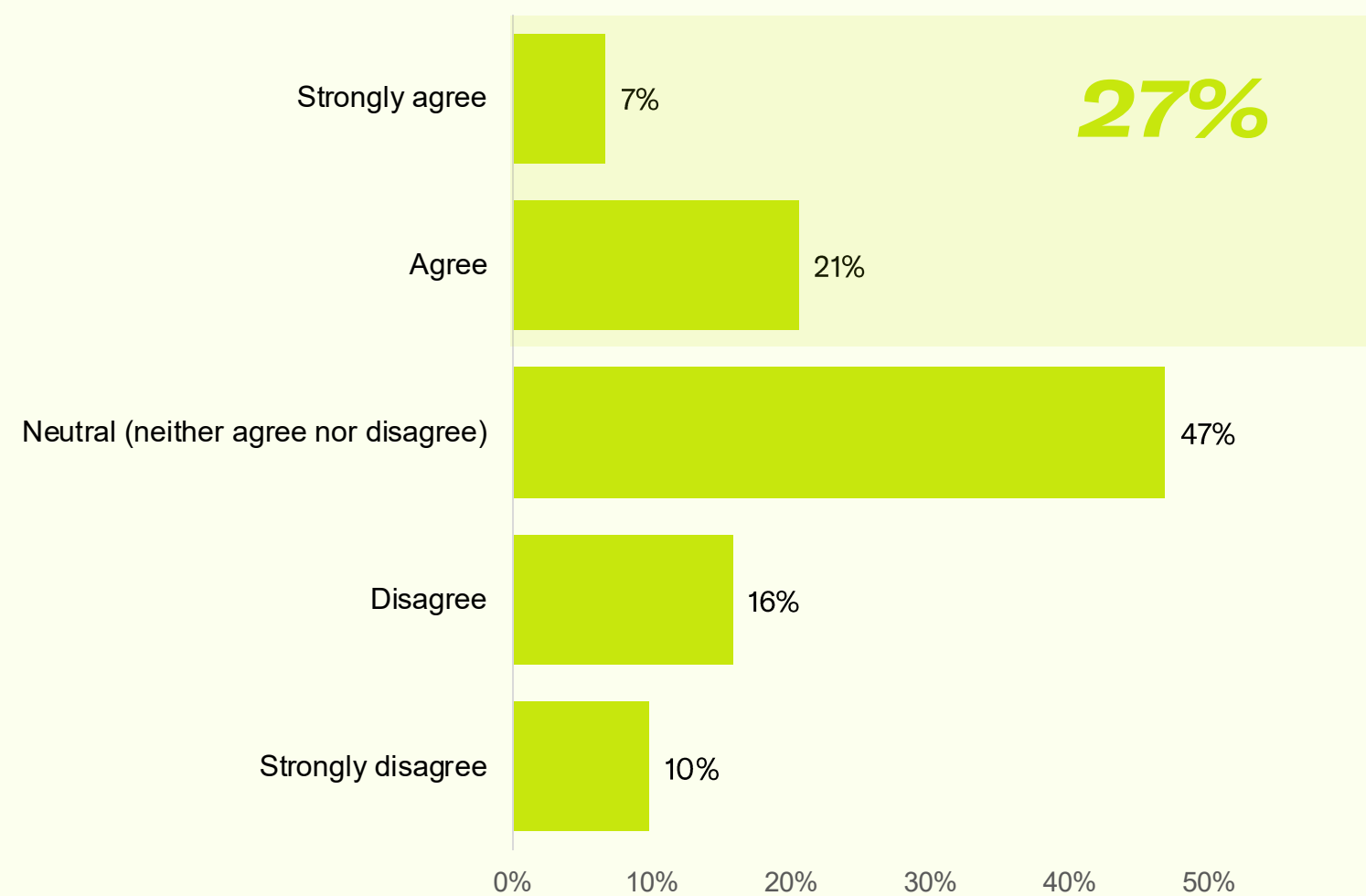
Resident Sentiment & Tourism Impacts

Destination Stewardship

Statement:

“I’ll be more proactive in reducing the impact my travel on the environment.”

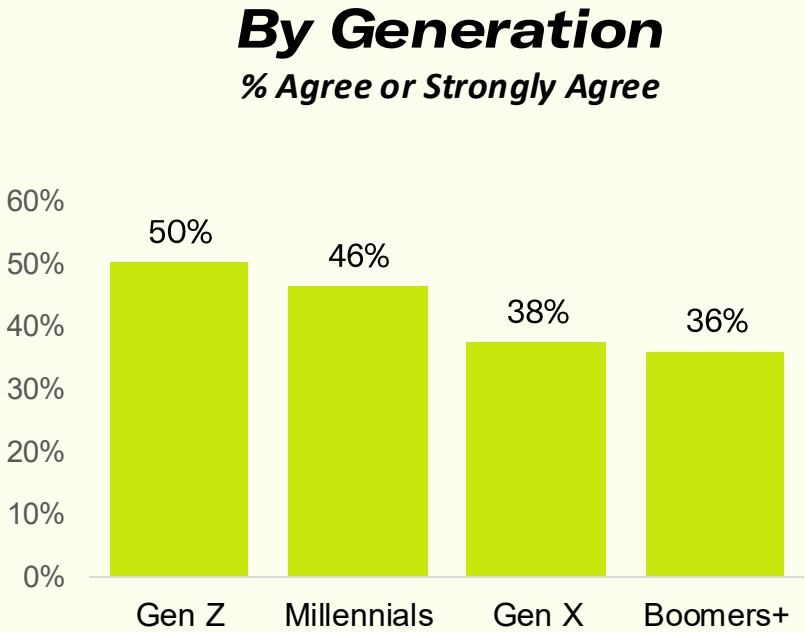
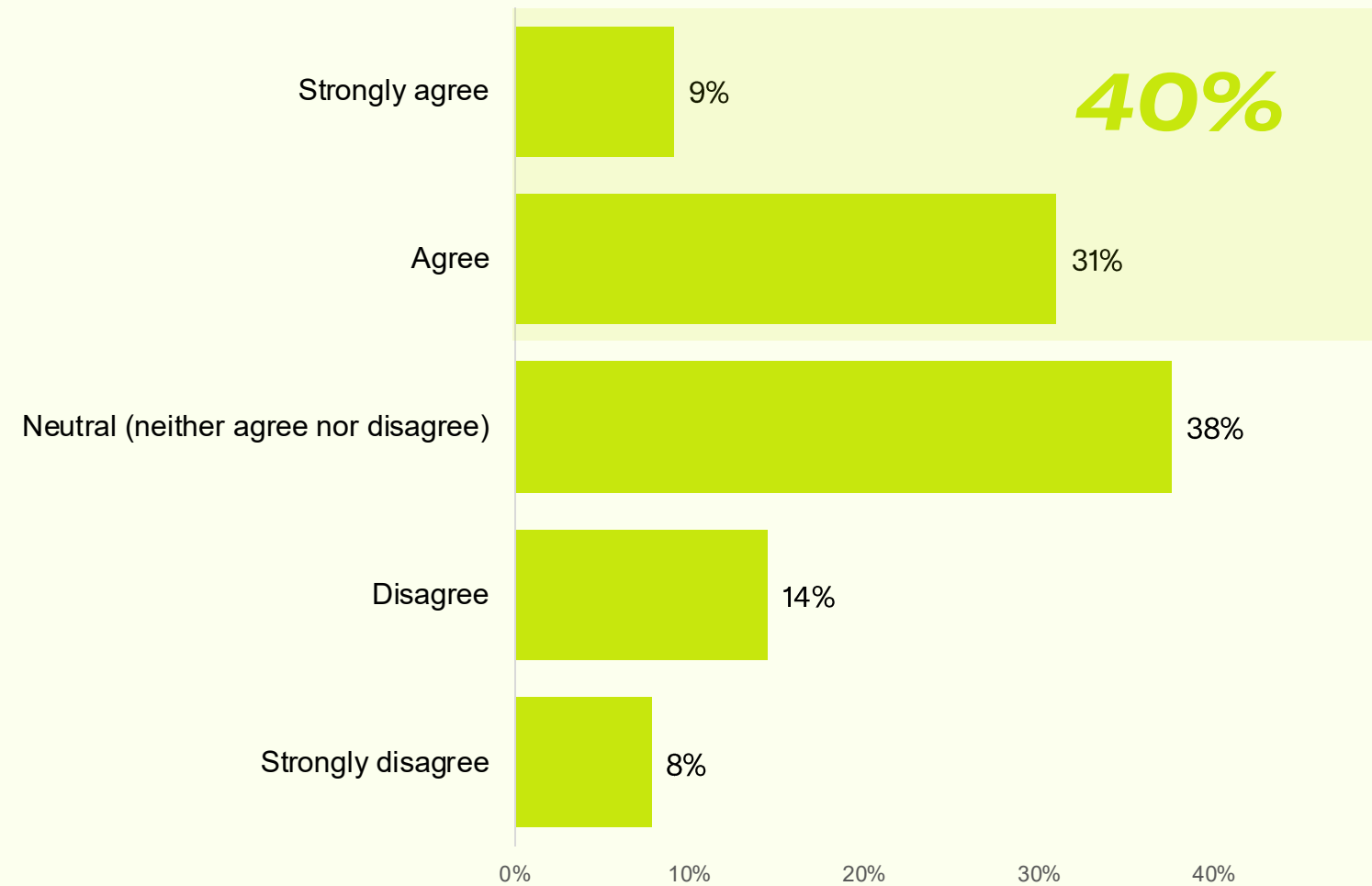
Younger travelers are more likely to say they'll be more proactive about reducing the environmental impact of their travel.



Statement:

“I usually make a
conscious effort to reduce
the environmental impact
of my travel.”

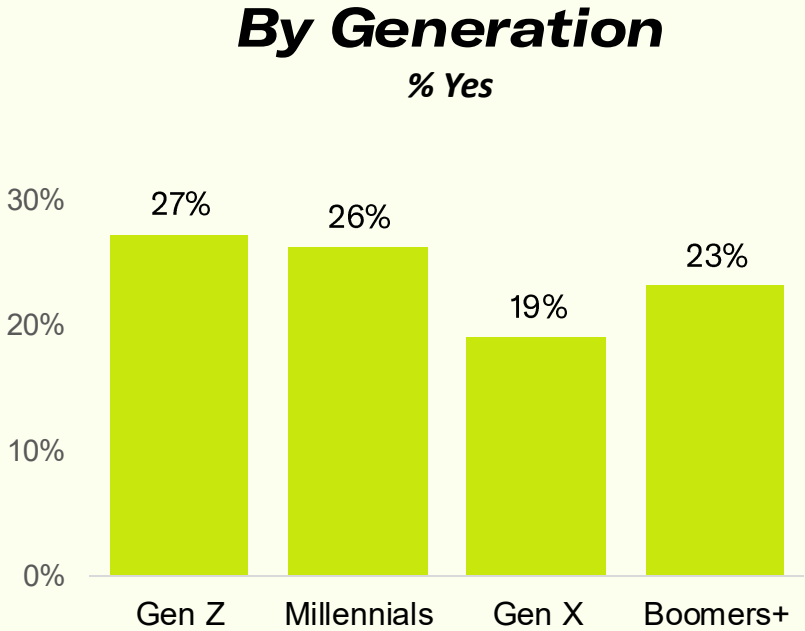
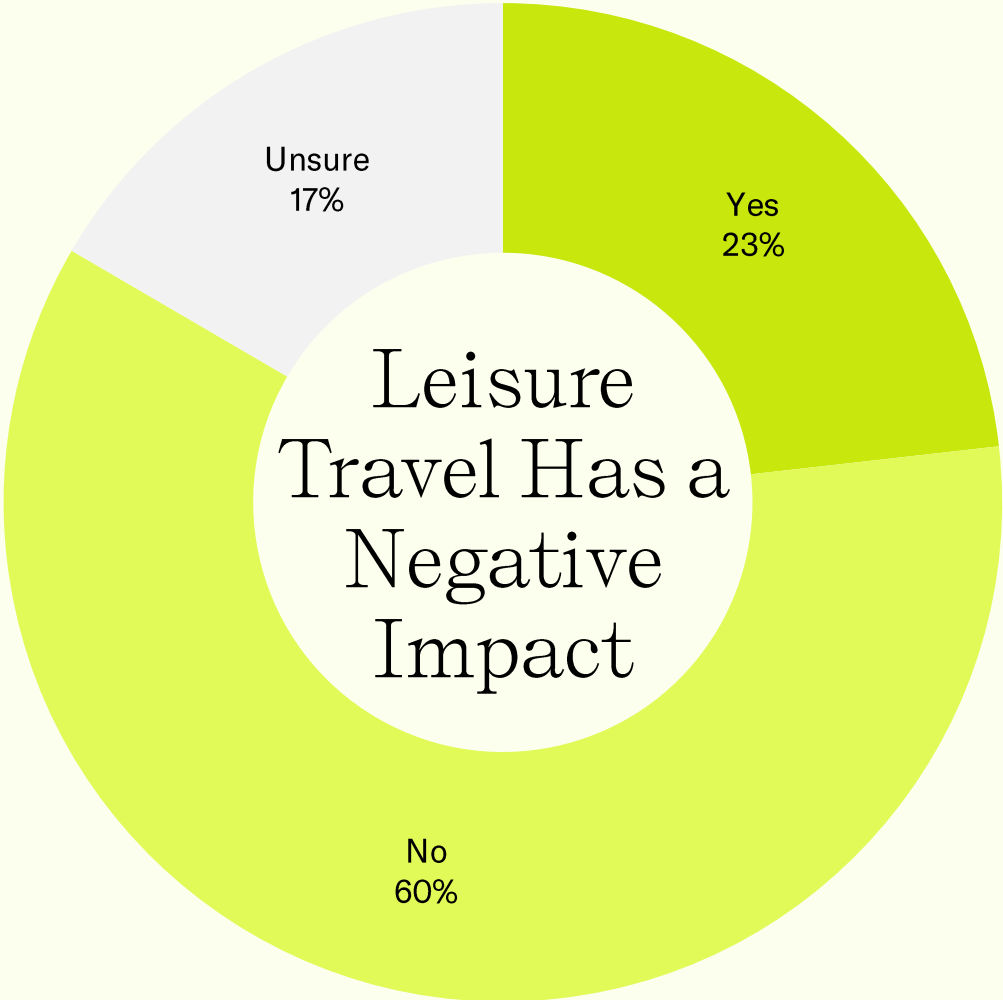
Four in ten American travelers are already working to reduce their environmental impact on trips.



Question:

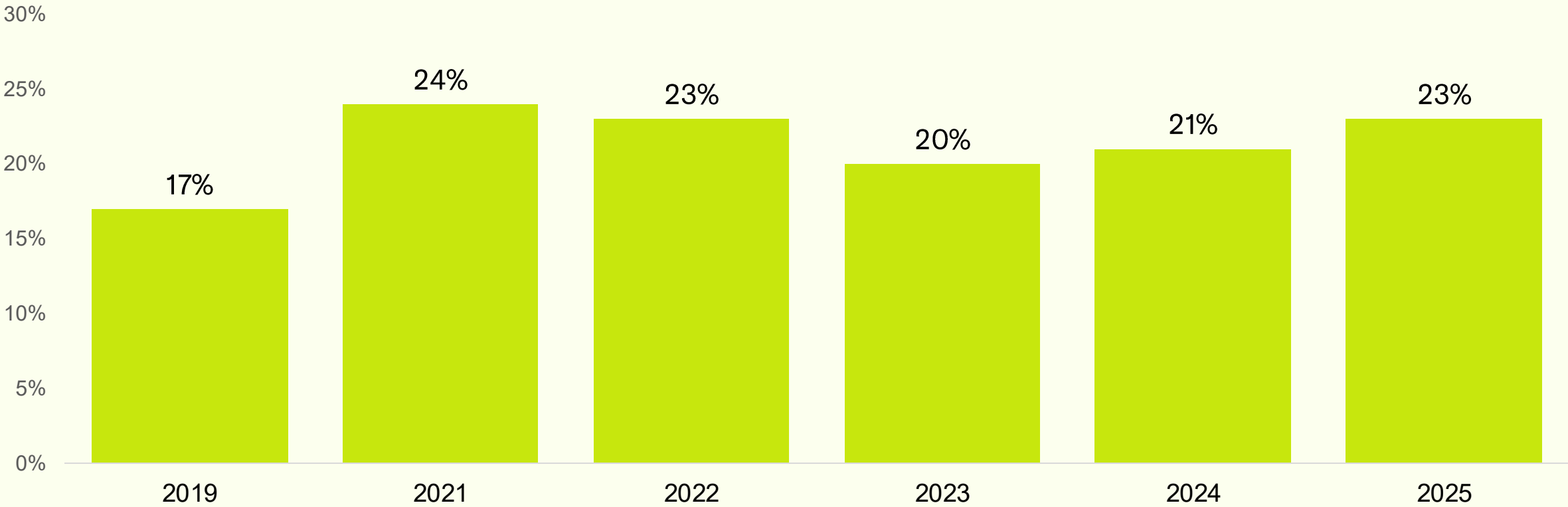
“Do you believe that people traveling for leisure have an overall negative impact on the environment?”

Just under one in four American travelers feel travel negatively impacts the environment.



Belief that travel negatively impacts the environment has risen 6-points since 2019.

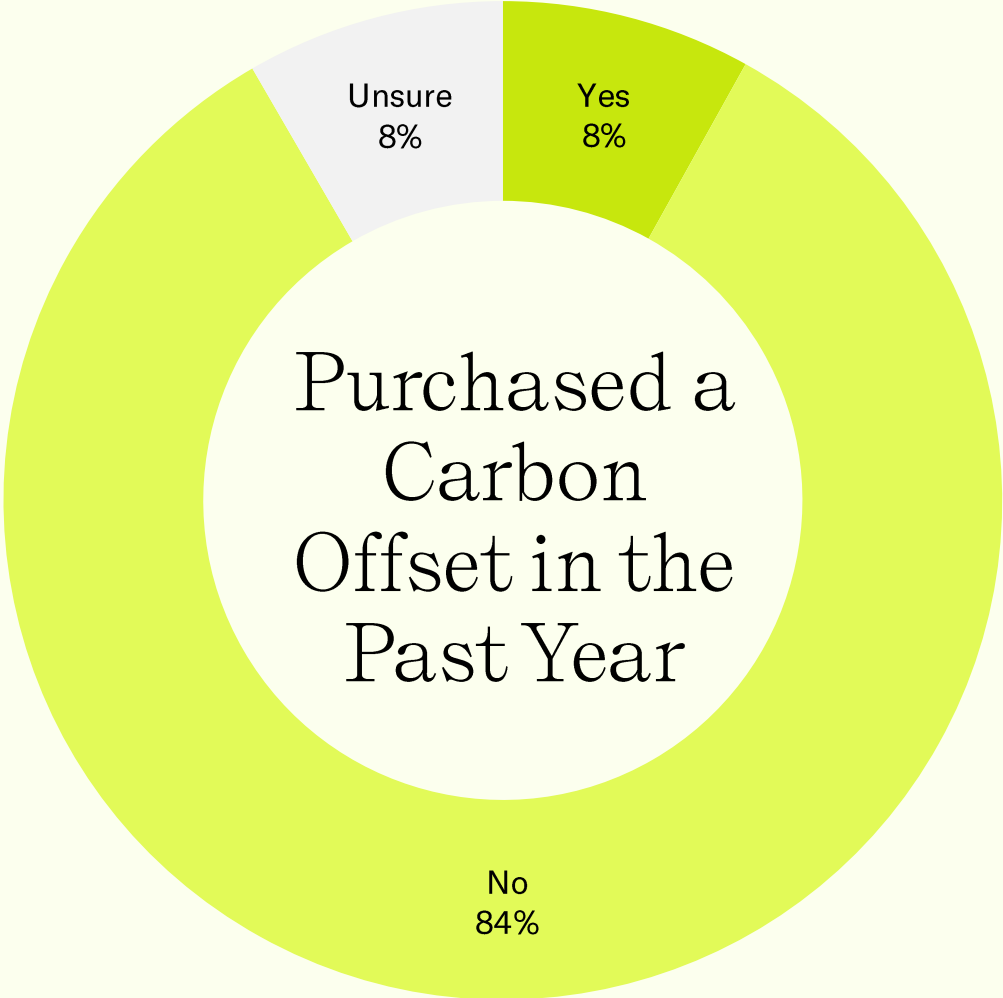
Historical Trends
% Yes – Leisure Travel Negatively Impacts the Environment



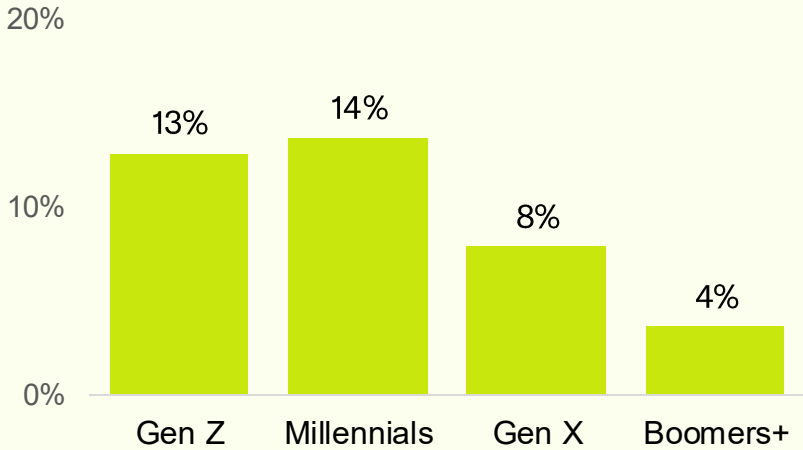
Survey respondents were shown this information and then asked a question:

“A carbon offset in travel is a payment made to offset or compensate for the emissions of greenhouse gases created by your trip, for example, from your air travel. Carbon offsets might restore forests or wetlands or expand renewable energy.”

Only a small portion of American travelers have purchased a carbon offset recently, led by younger travelers.



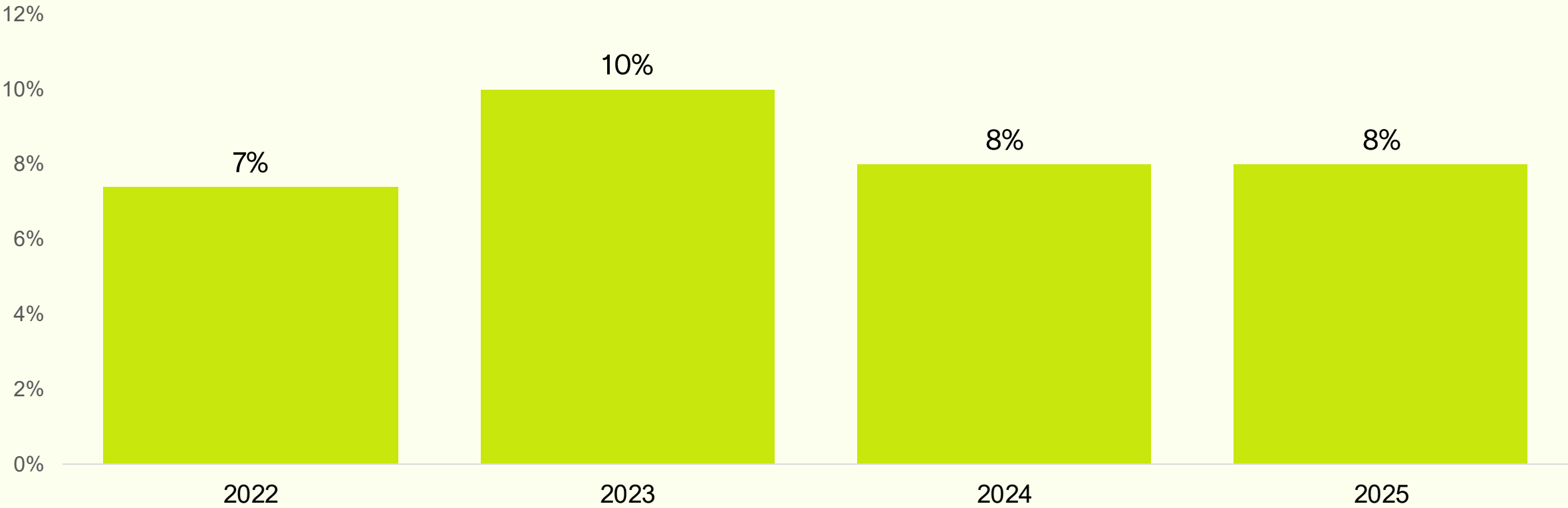
By Generation
% Yes



The rate of carbon offset purchase amongst American travelers remained unchanged from last year.

Historical Trends

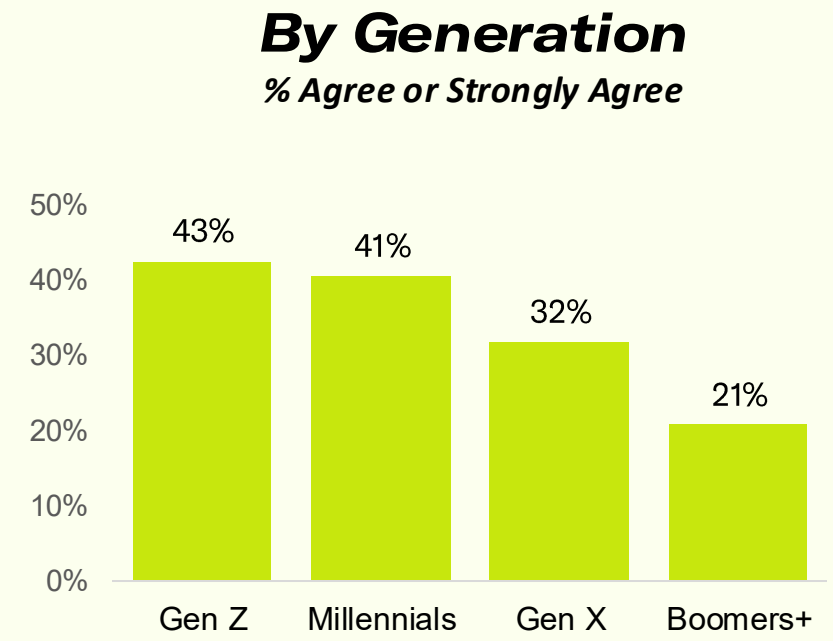
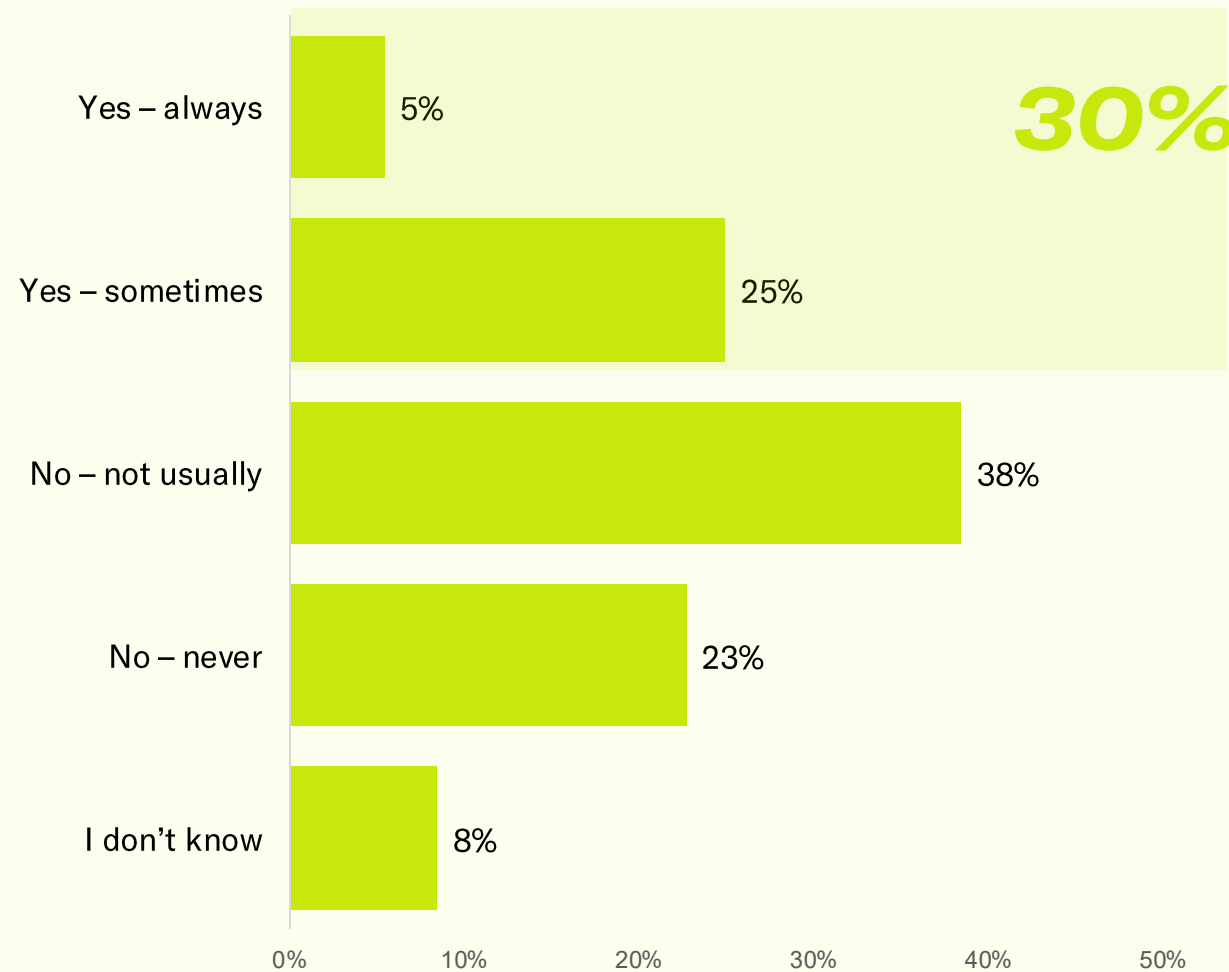
% Yes – Purchased a Carbon Offset in the Past Year



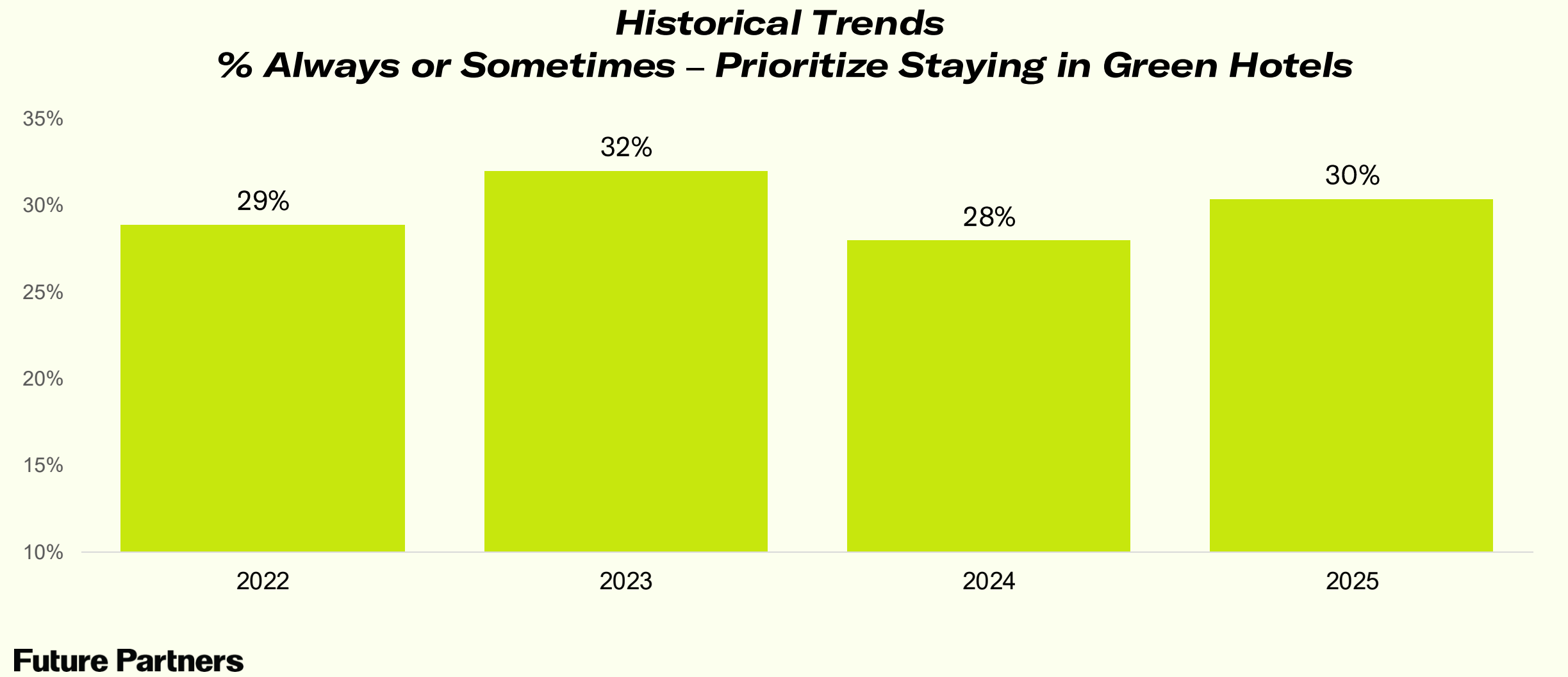
Survey respondents were shown this information and then asked a series of questions:

“Many hotels now have “green” programs and certifications that show their commitment to reducing their environmental impact (e.g., recycling, water conservation, energy efficiency, use of renewable energy, etc.)”

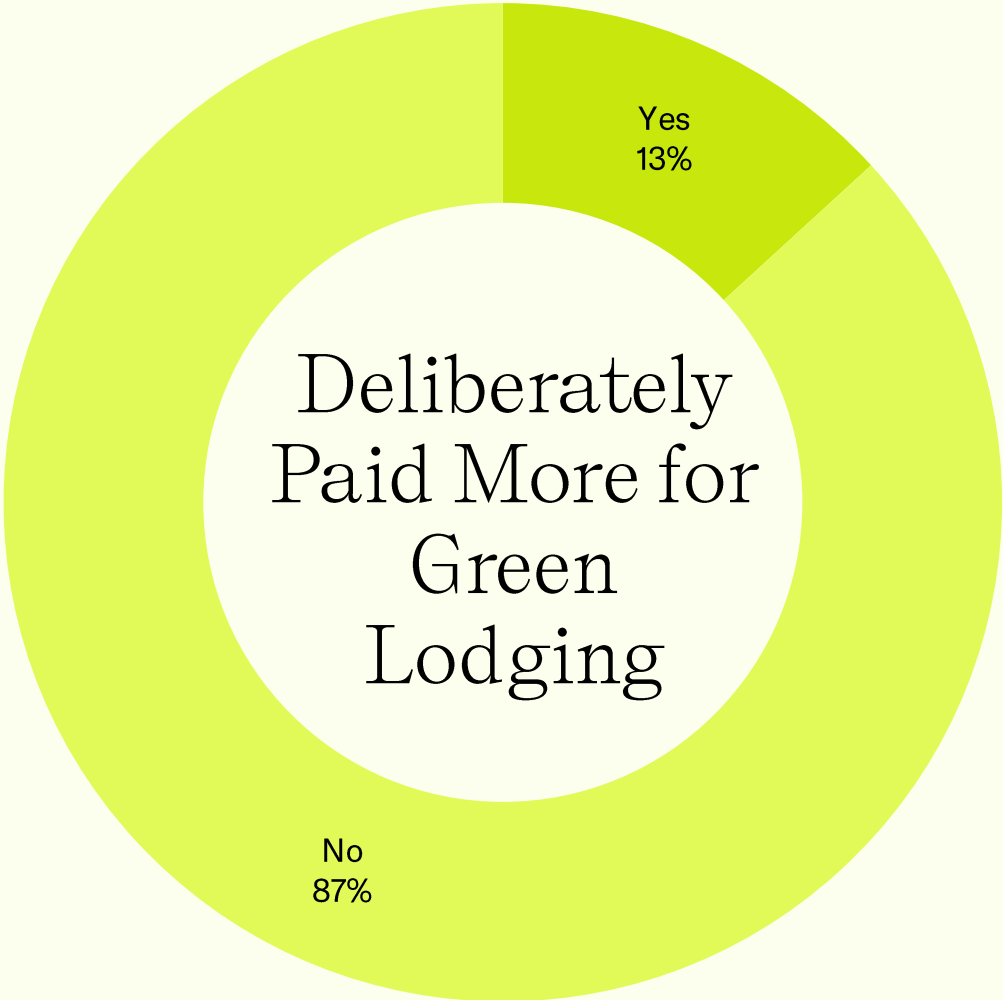
Three in ten American travelers sometimes or always prioritize “green” hotels; older travelers continue to show less interest.



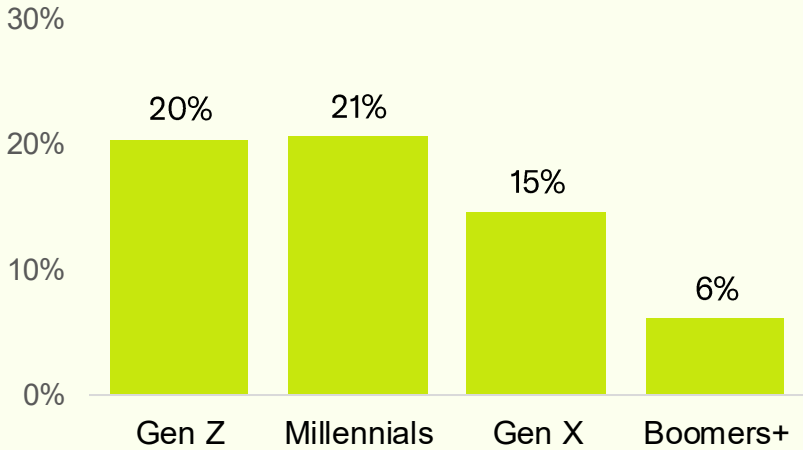
As with other environmental travel trend metrics, prioritization of booking green hotels has also remained relatively flat.



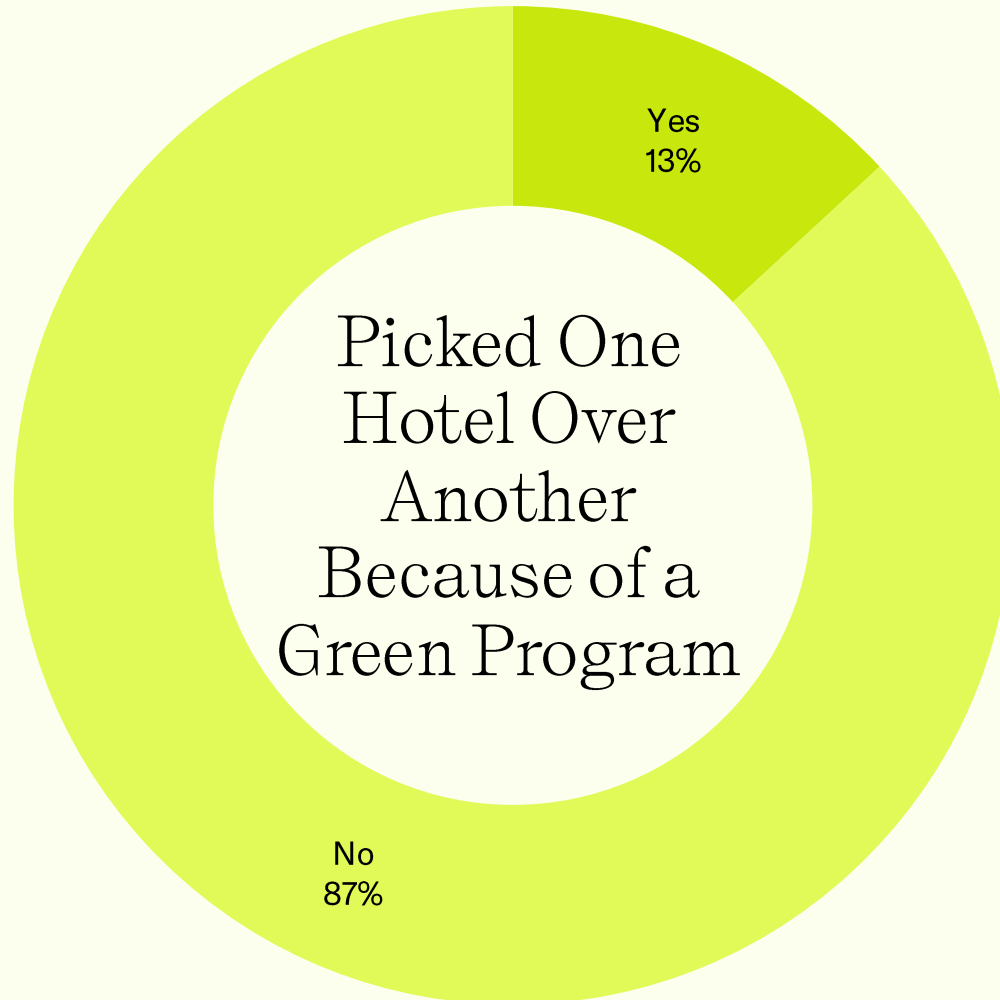
In the last year, 13% of American Travelers knowingly paid more to stay in hotels with strong green programs



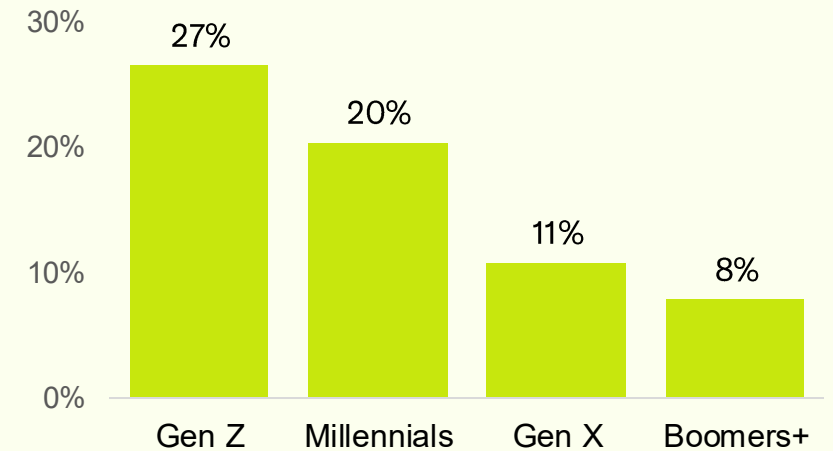
By Generation
% Yes



In fact, a similar share of travelers selected one hotel over another because of a green program.



By Generation
% Yes



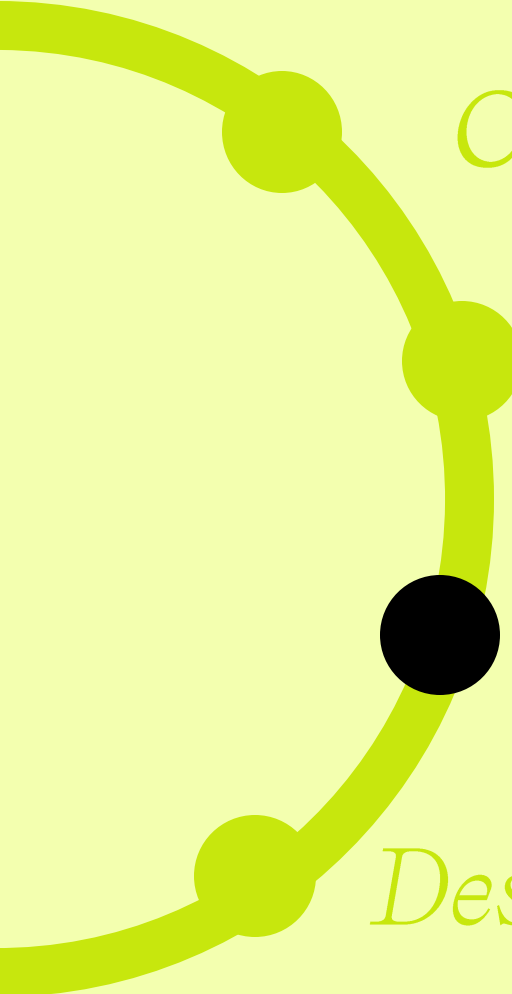
“What would make it easier for you to choose eco-friendly options when you travel?”

A woman with long brown hair, wearing a brown beanie and a bright orange jacket, is hiking. She has a large yellow backpack on her back and is looking off to the side with a smile. The background is a lush green forest of evergreen trees, with a rocky mountain peak visible in the distance under a clear sky.

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**We Asked Leisure
Travelers...**

Today's Agenda



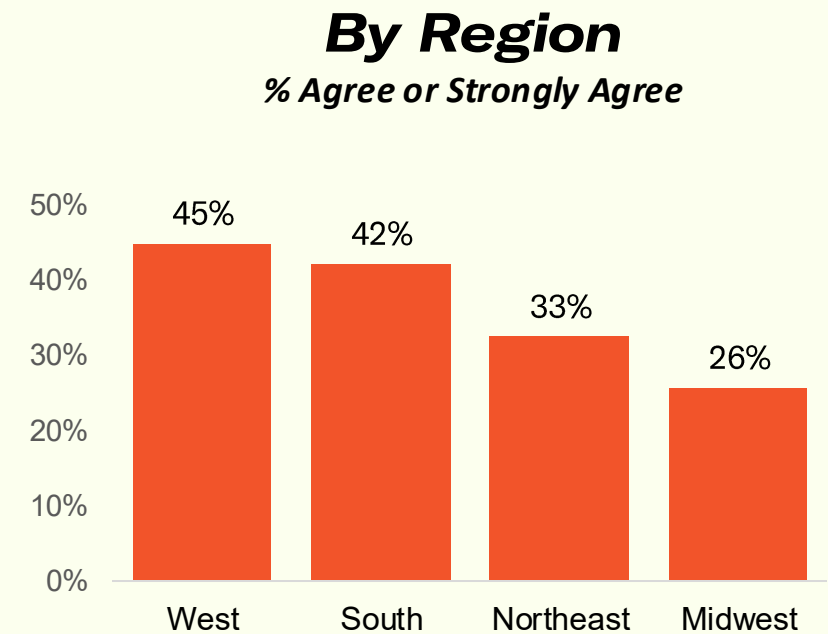
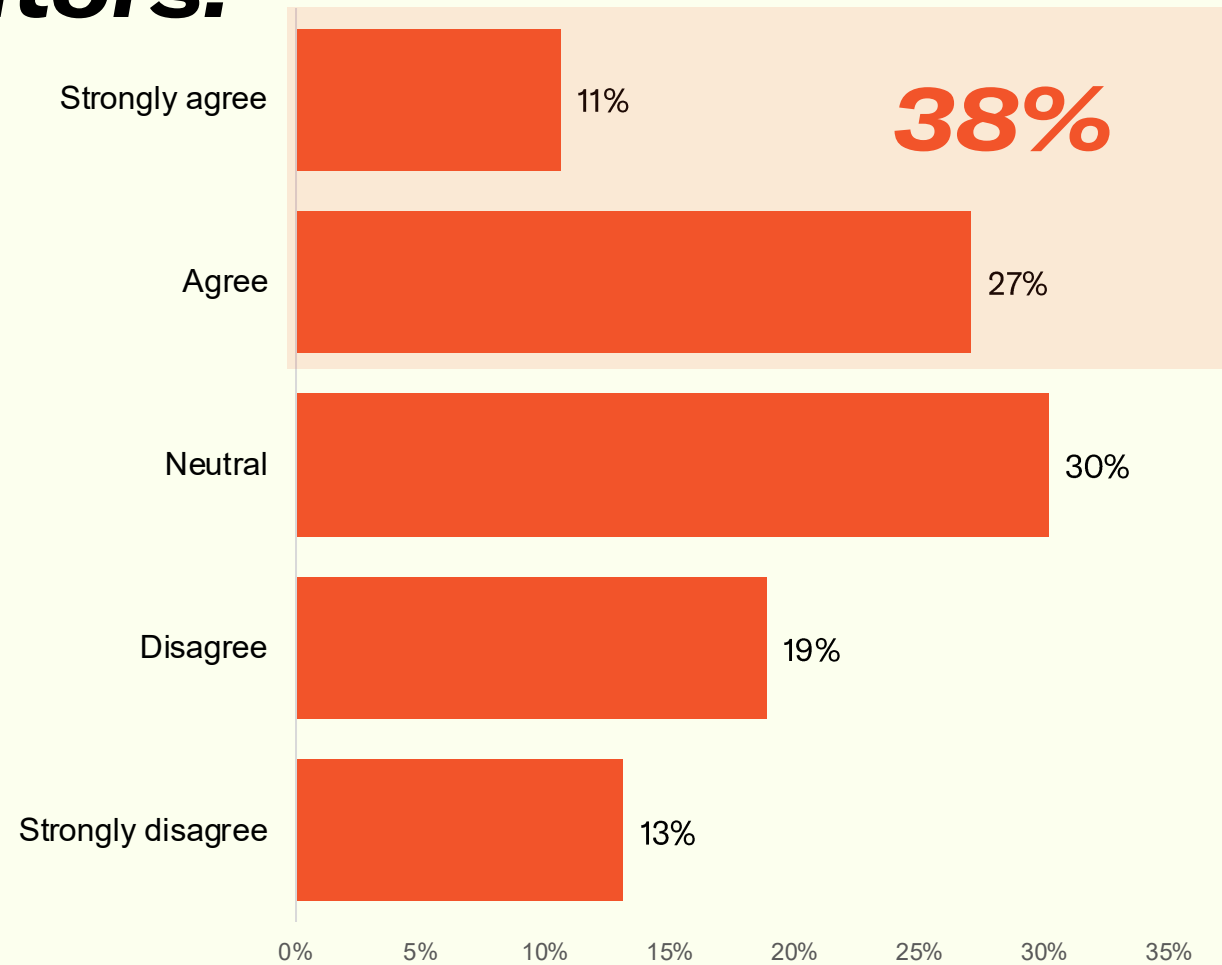
Current Travel Sentiment

Sustainable Travel Trends

Resident Sentiment & Tourism Impacts

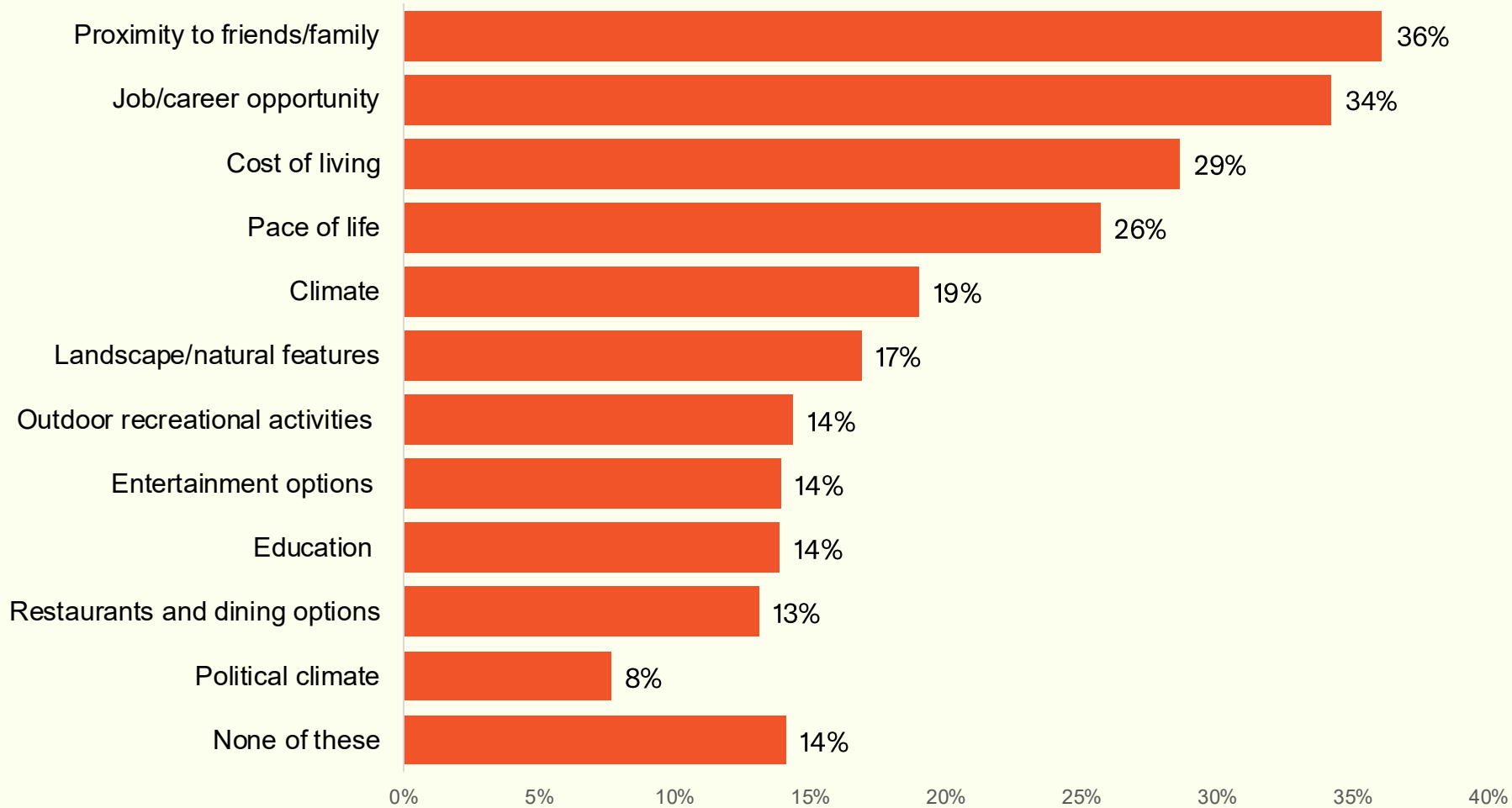
Destination Stewardship

Nearly four in ten American travelers chose to live in their community because they were once visitors.



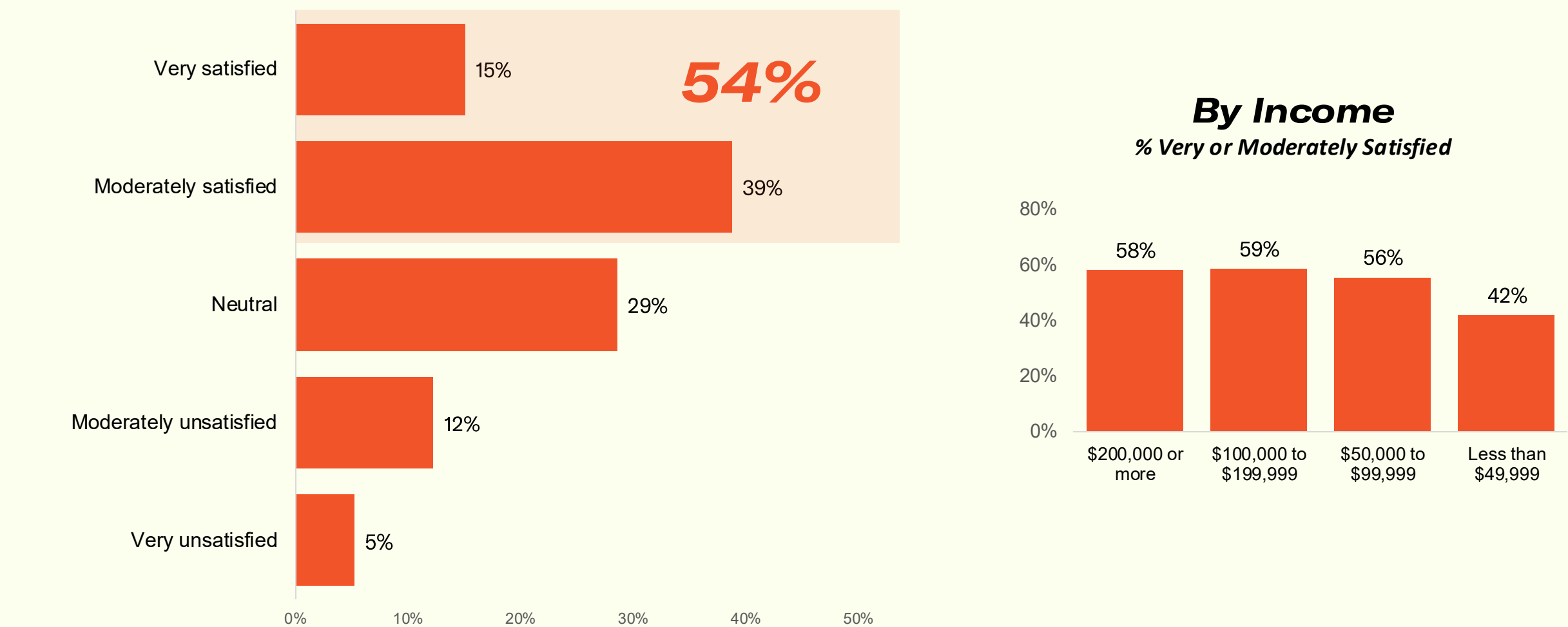
Statement: Please rate how much you agree or disagree with the following statement: "I moved to my local community primarily because I visited and loved the place."

Proximity to loved ones and jobs top are the primary drivers of residency choice, followed by cost of living and pace of life.



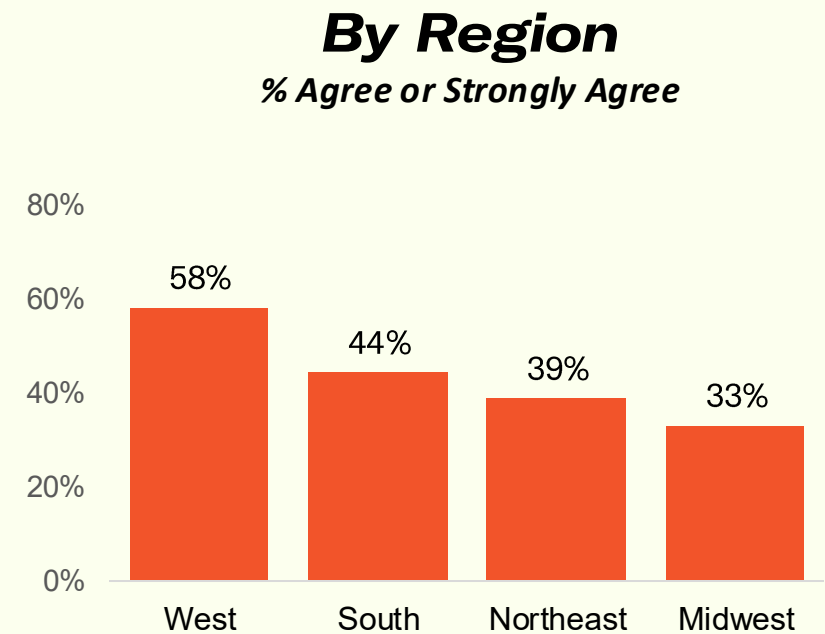
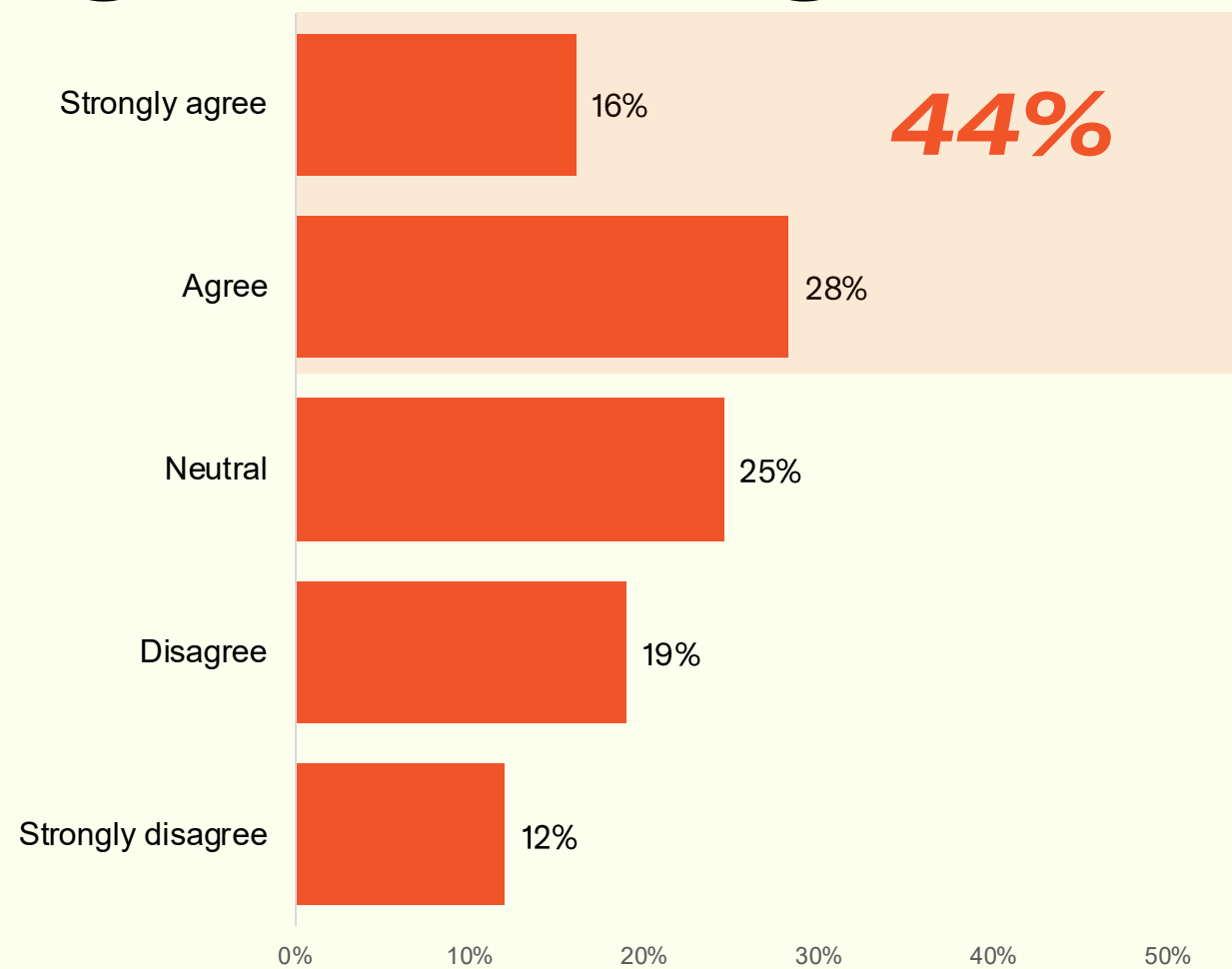
Question: Which of the following reasons best describe why you originally moved to your local community?

More than half of American travelers are satisfied with the direction their community is taking; however lower income residents are less satisfied.



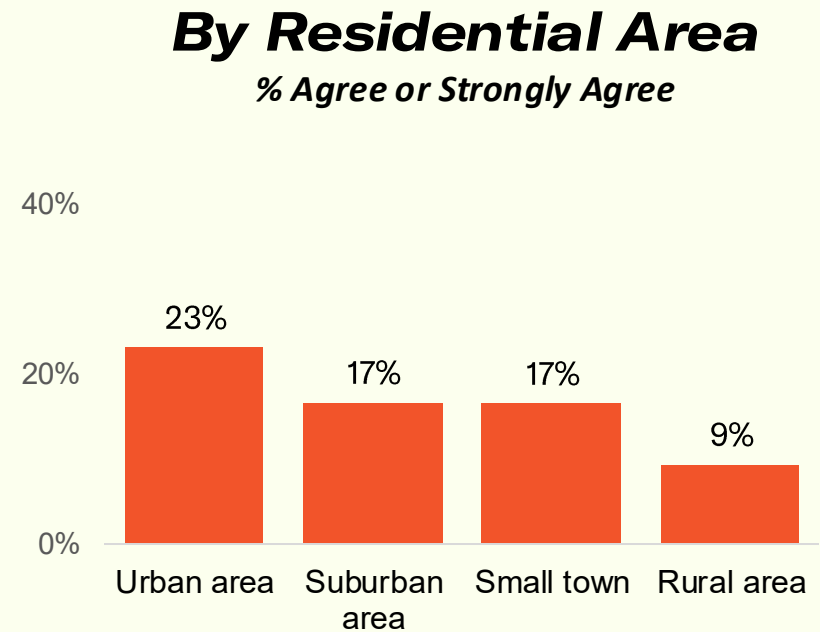
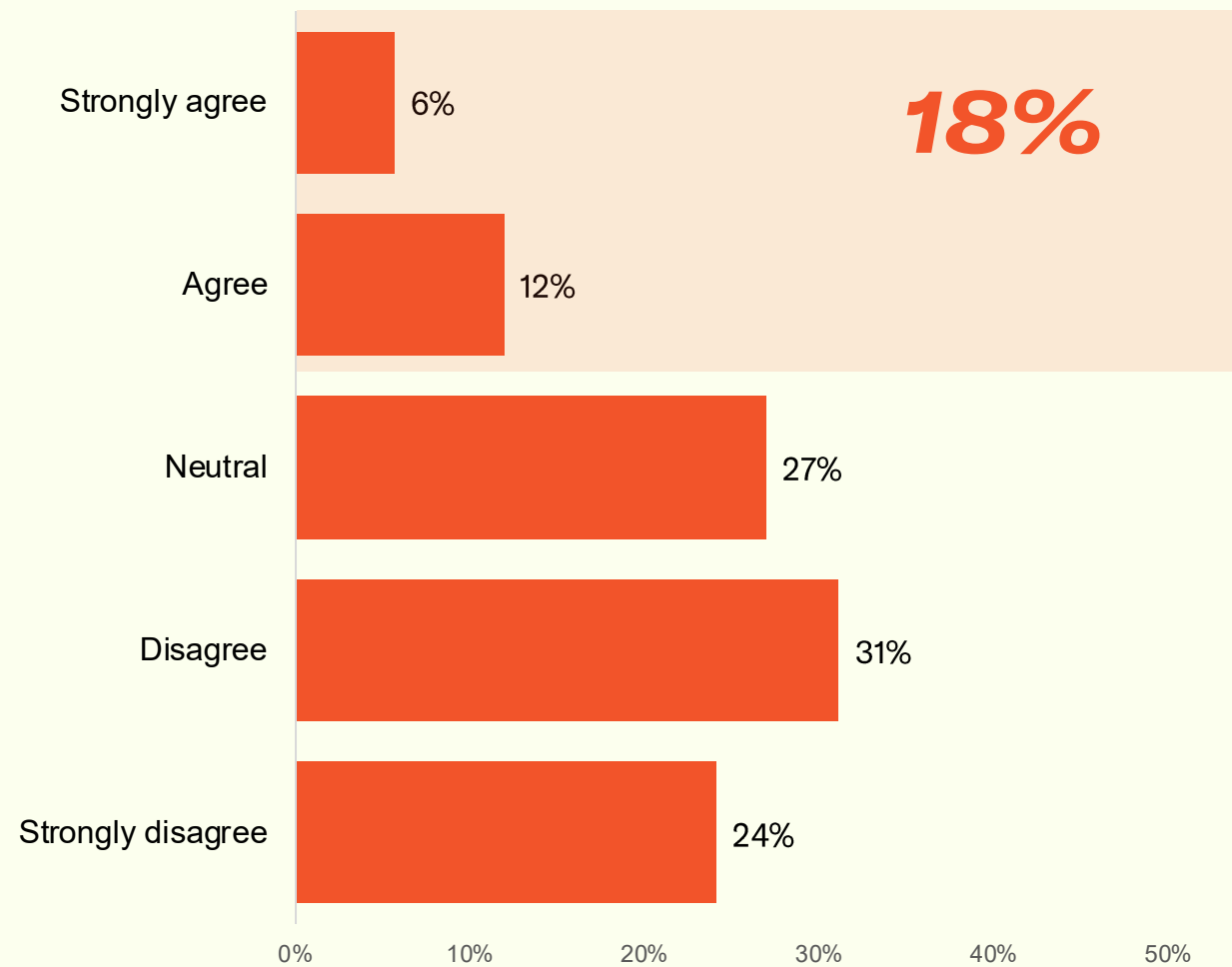
Question: All things considered, how satisfied are you with the direction your local community is headed?

Over four in ten American travelers say they live in a popular tourism destination; even more pronounced amongst those residing in the West.



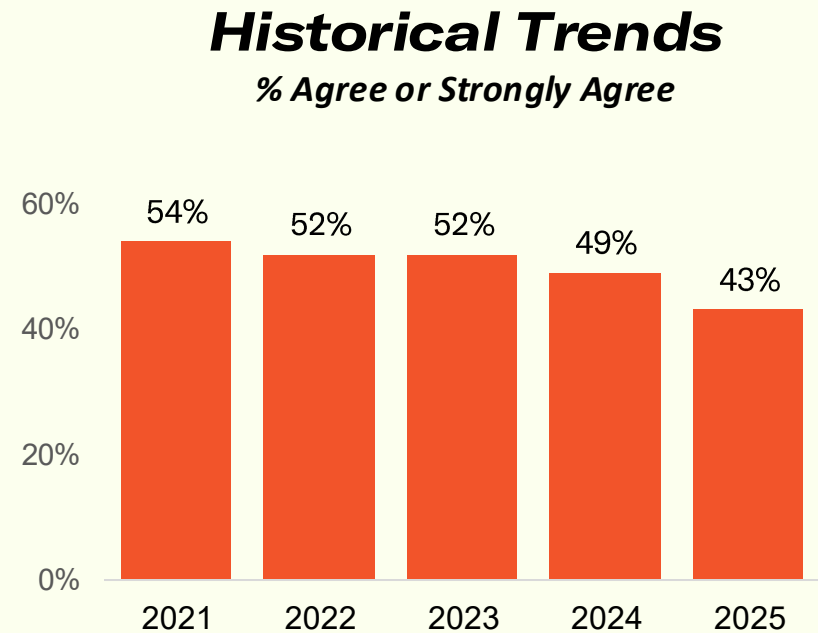
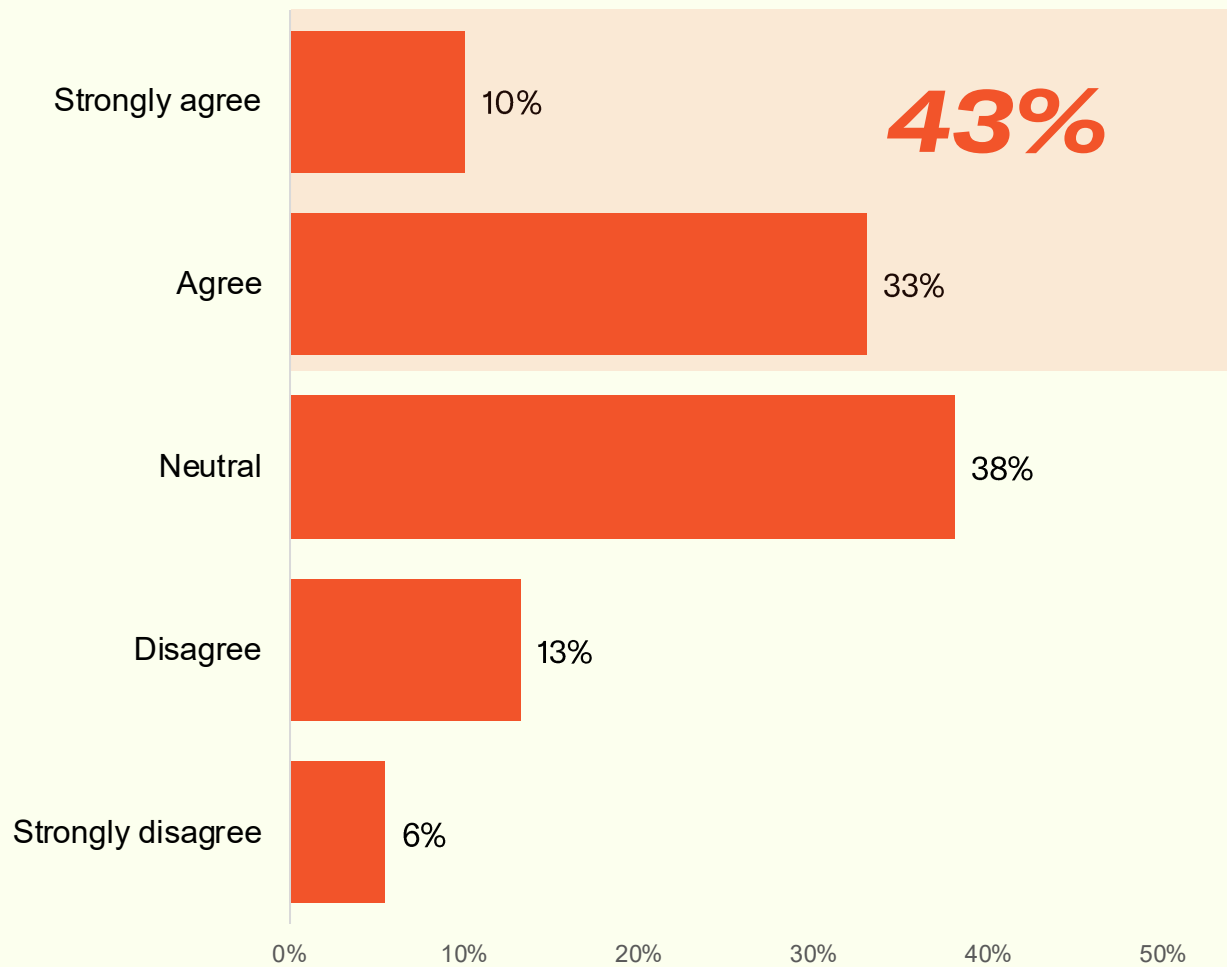
Statement: Please rate how much you agree or disagree with the following statement: "I live in a community that is a popular tourism destination."

But only a small share feel they live in a place that faces over-tourism, led by urban residents.



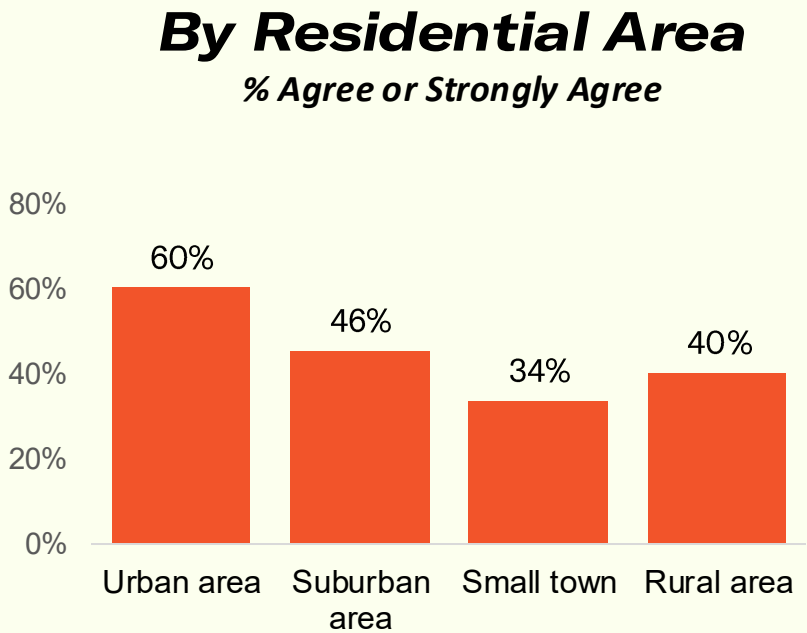
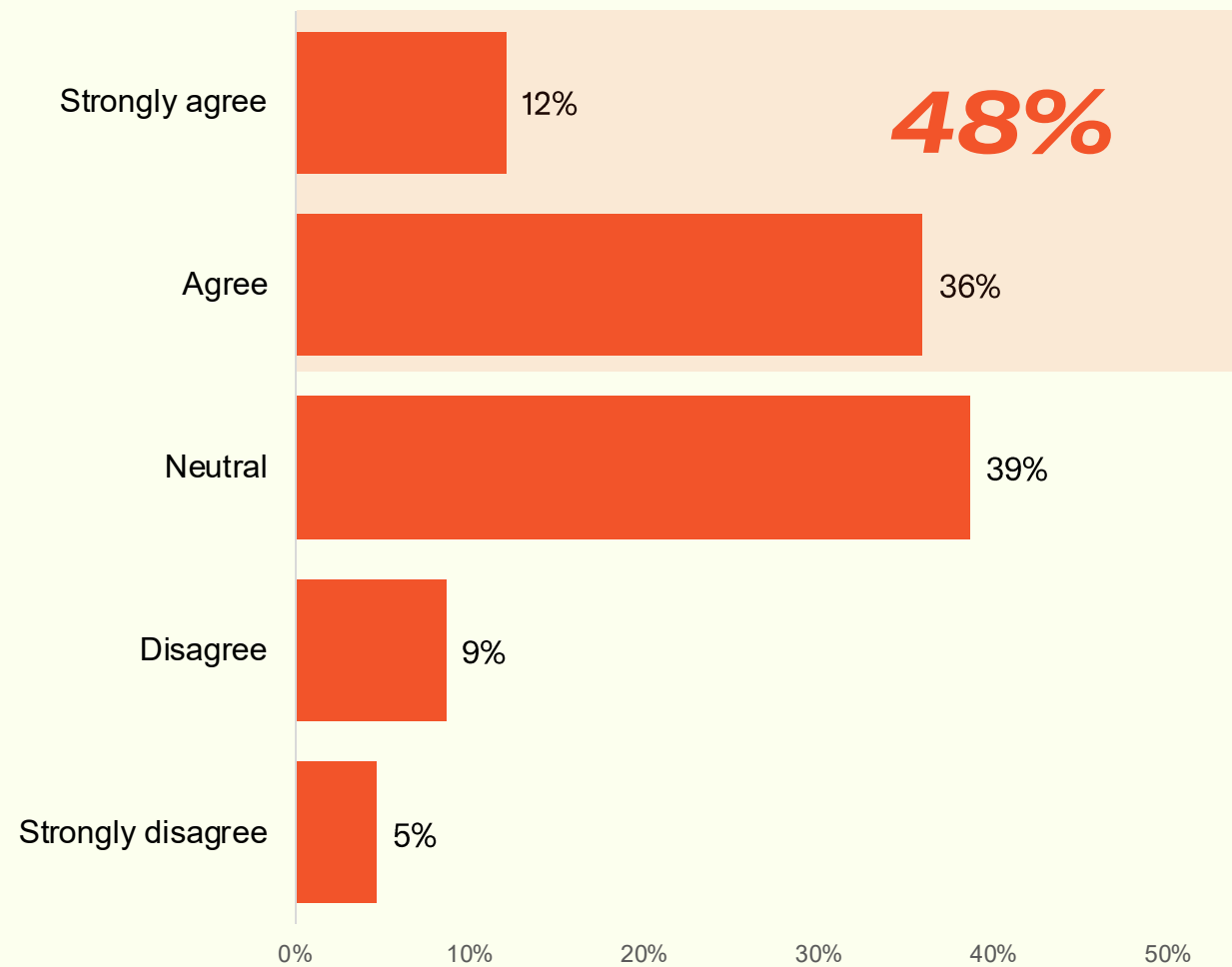
Statement: Please rate how much you agree or disagree with the following statement: "I live in a place that has an issue with OVER-TOURISM (i.e., a place that has too many tourists.)"

Compared to prior years, over-tourism is less likely to deter American travelers from visiting.



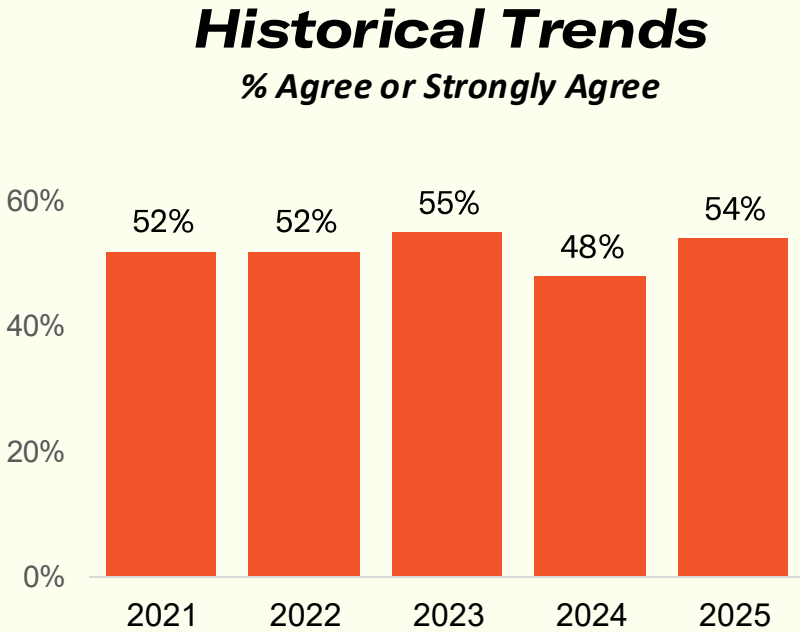
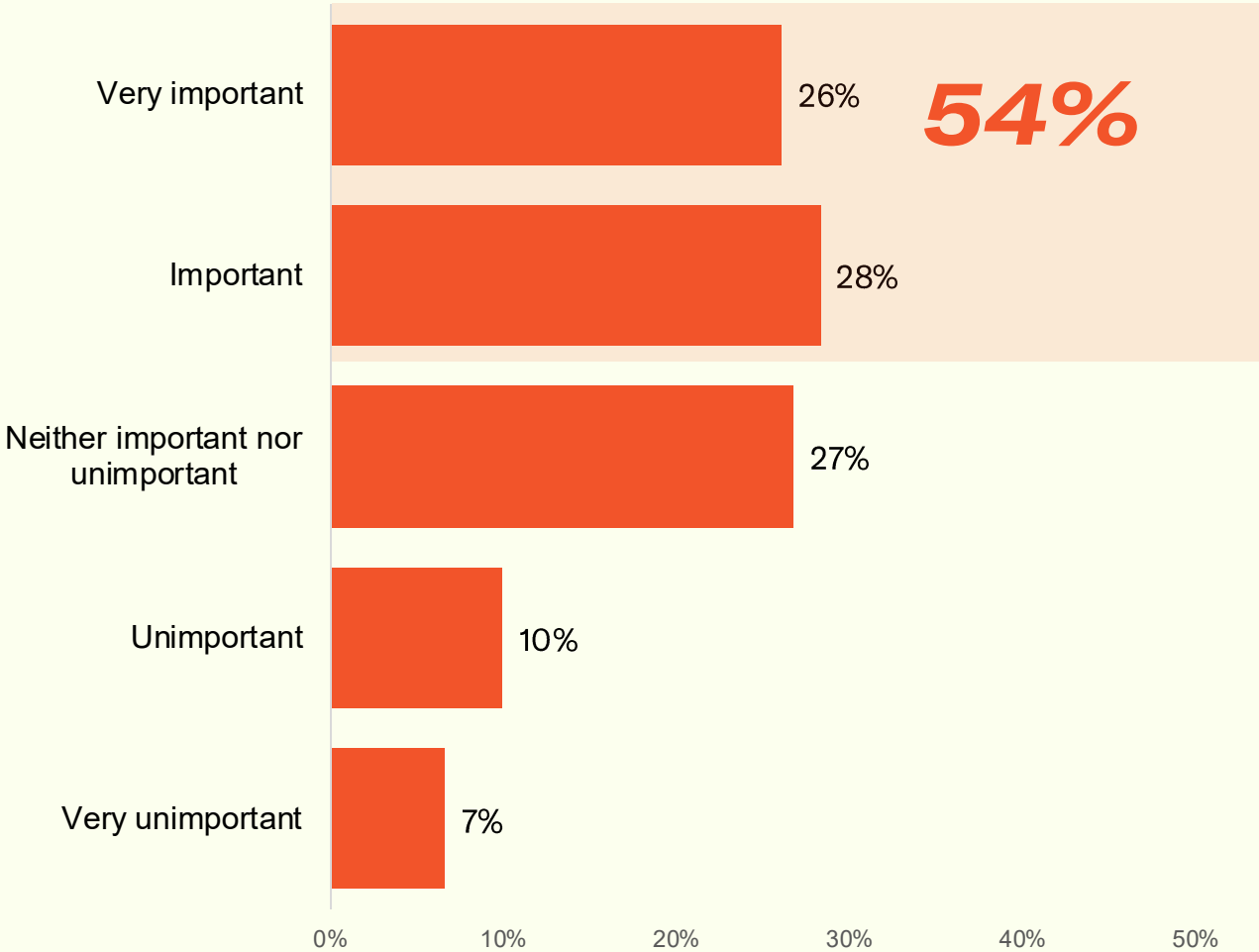
Statement: Please rate how much you agree or disagree with the following statement: "If a U.S. destination has a problem with OVER-TOURISM, I am less likely to visit it."

A record 48% of American travelers believe tourism makes their community a better place to live.



Statement: Please rate how much you agree or disagree with the following statement: "I believe tourism in my community makes it a better place in which to live."

An even larger share believe tourism is important to their community's economic vitality.



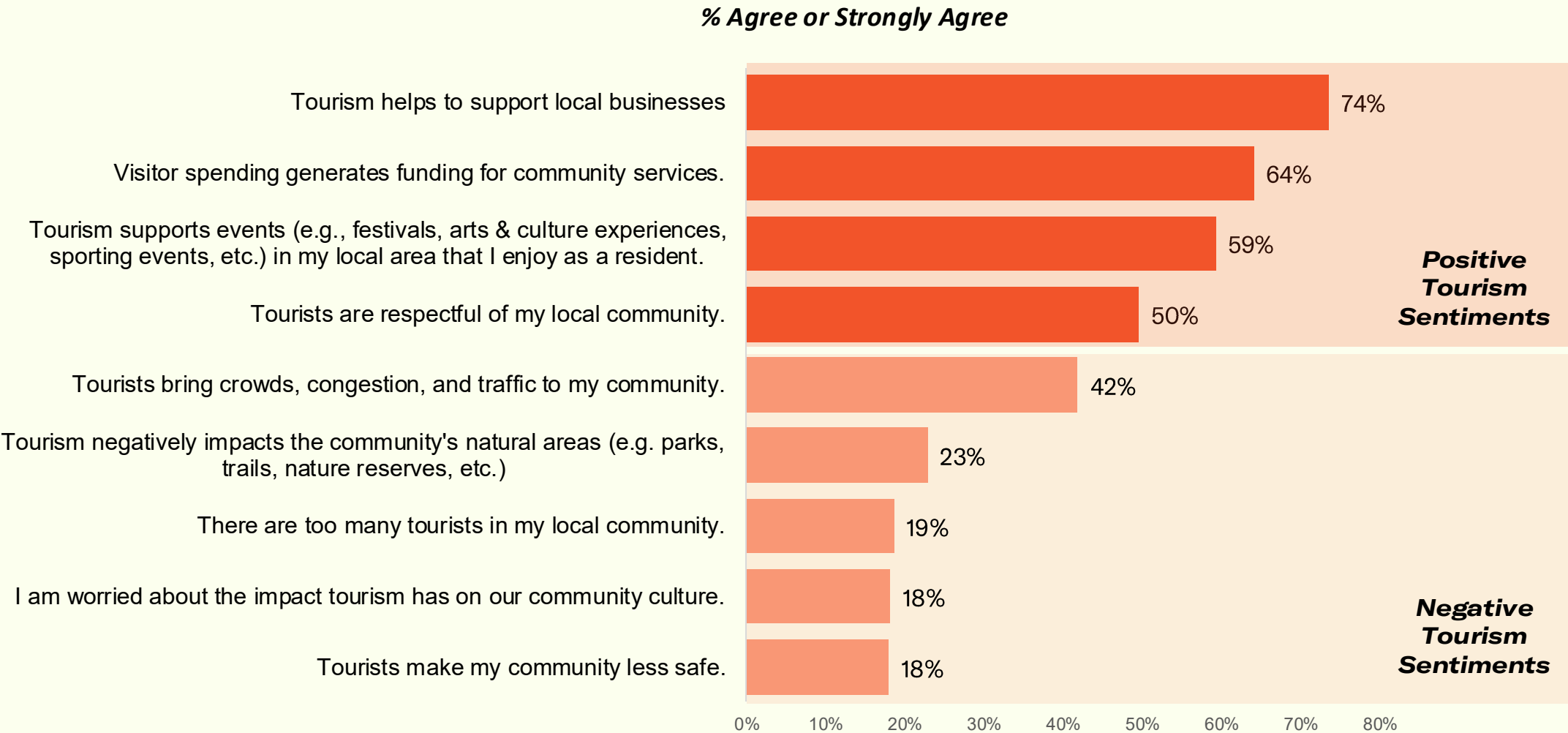
Question: In your opinion, how important is the tourism industry to the economic vitality of the community in which you live?

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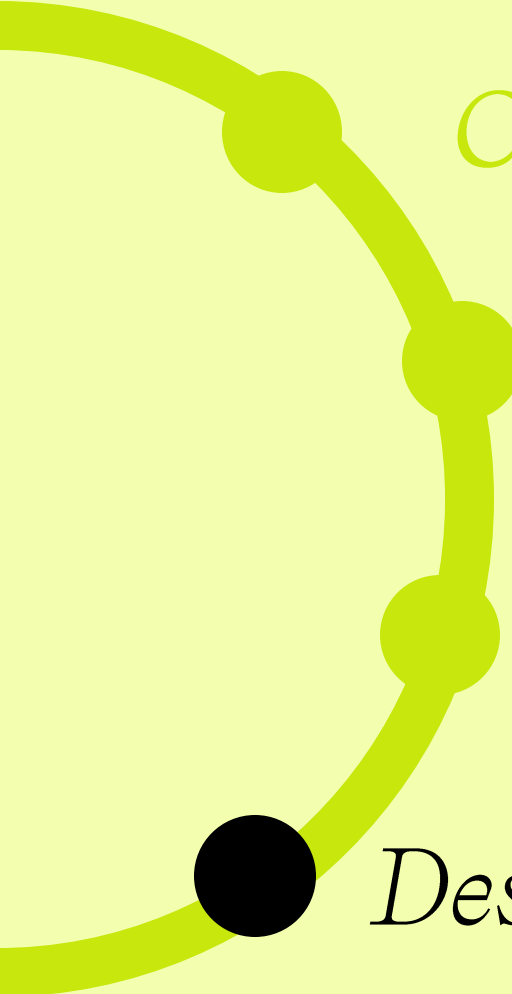
(Base: All respondents, 4,109 completed surveys. Data collected October 16-26, 2025.)

Survey respondents were asked to think about their community's tourism industry and its impact on their community, then rate how much they agree with several statements.

Americans are more likely to align with the positive impacts of tourism over the negative.



Today's Agenda



Current Travel Sentiment

Sustainable Travel Trends

Resident Sentiment & Tourism Impacts

Destination Stewardship

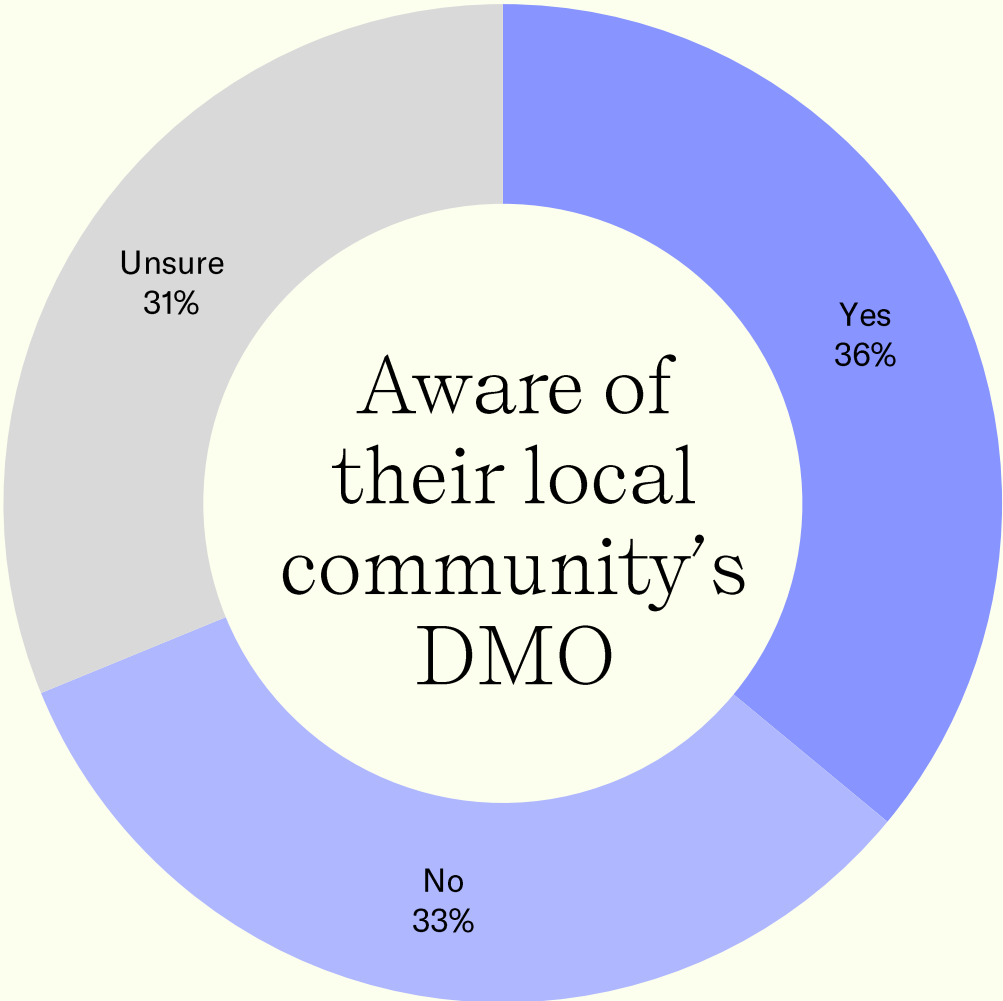
“Have you ever heard about your local tourism office? What do you think they do?”

A man and a woman are camping on a rocky outcrop at sunset. The man, on the left, wears a tan bucket hat and a light-colored long-sleeved shirt. The woman, on the right, wears a yellow beanie and a light-colored shirt. They are sitting at a small wooden table, clinking metal cups in a toast. On the table are a small stove, a kettle, and a glass. A guitar is leaning against the table. In the background, there's a vast landscape with mountains and a body of water under a dramatic, orange-hued sky. A lantern hangs from a branch on the left, and the corner of an orange tent is visible on the right.

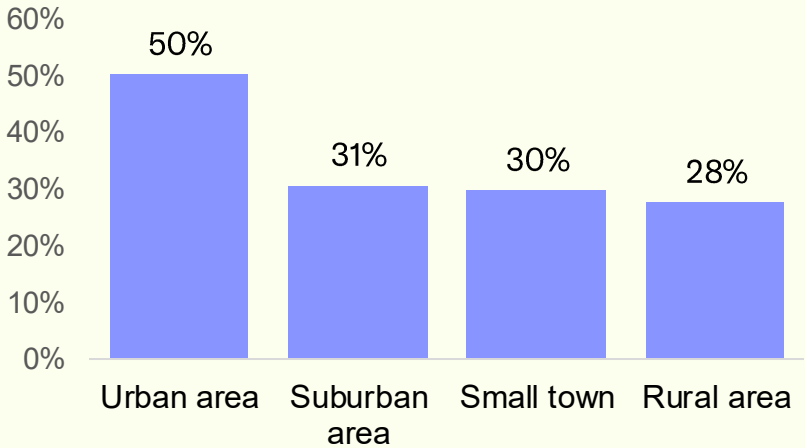
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**We Asked Leisure
Travelers...**

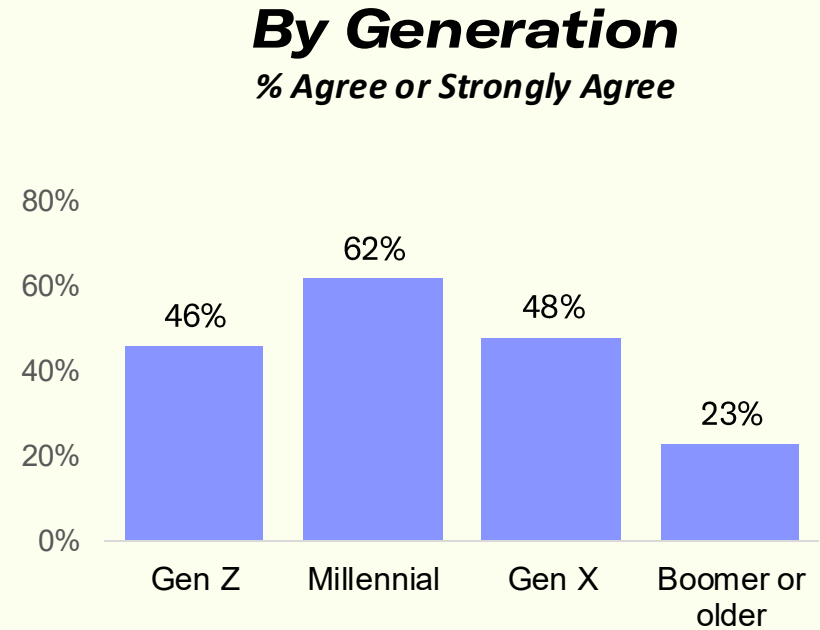
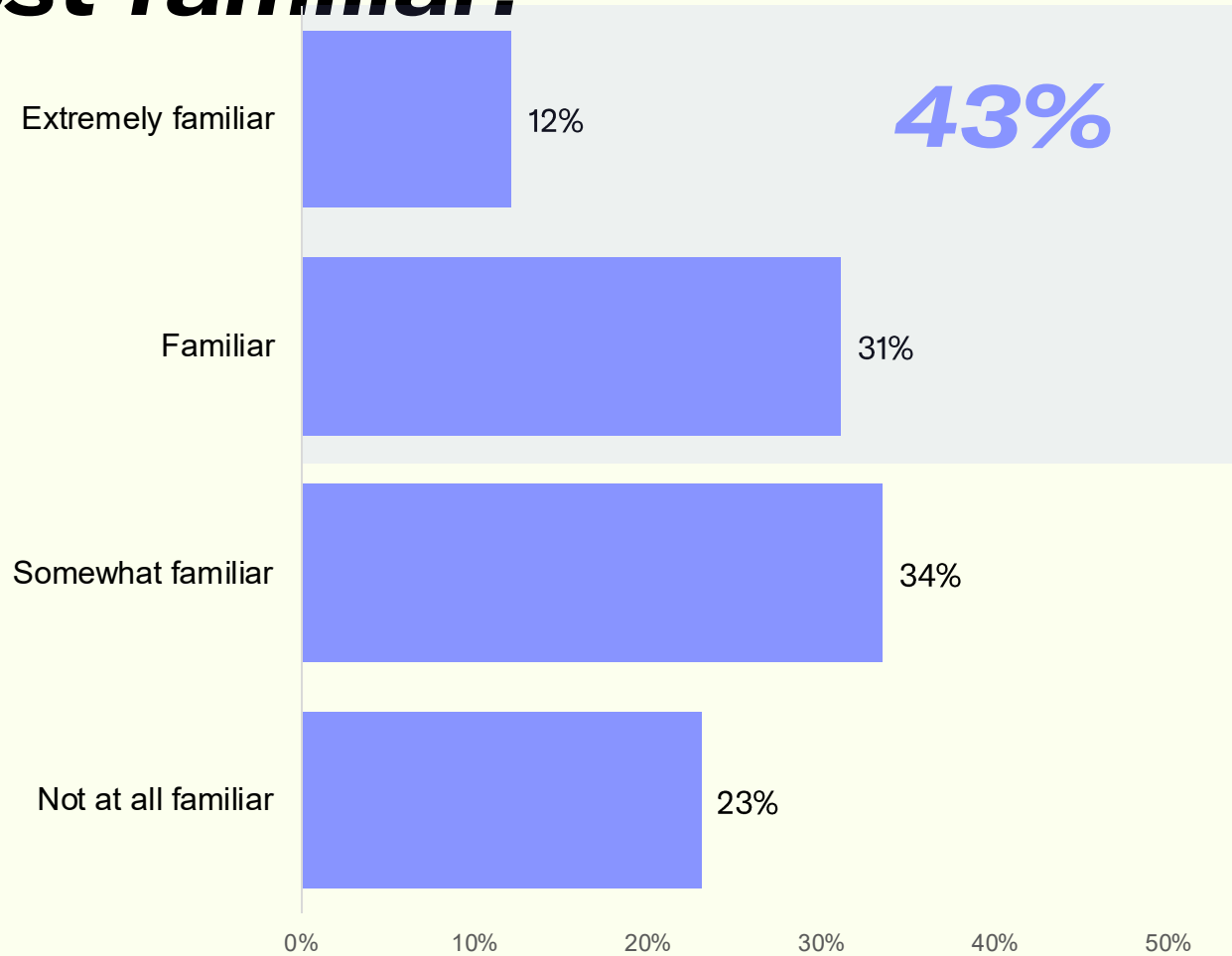
Over one-third of Americans are aware of their local destination marketing organization.



By Residential Area
% Yes

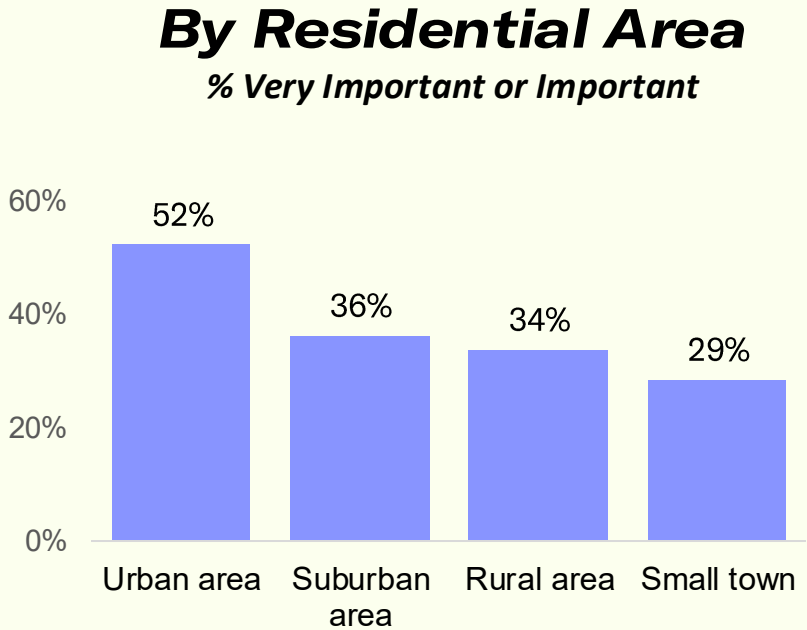
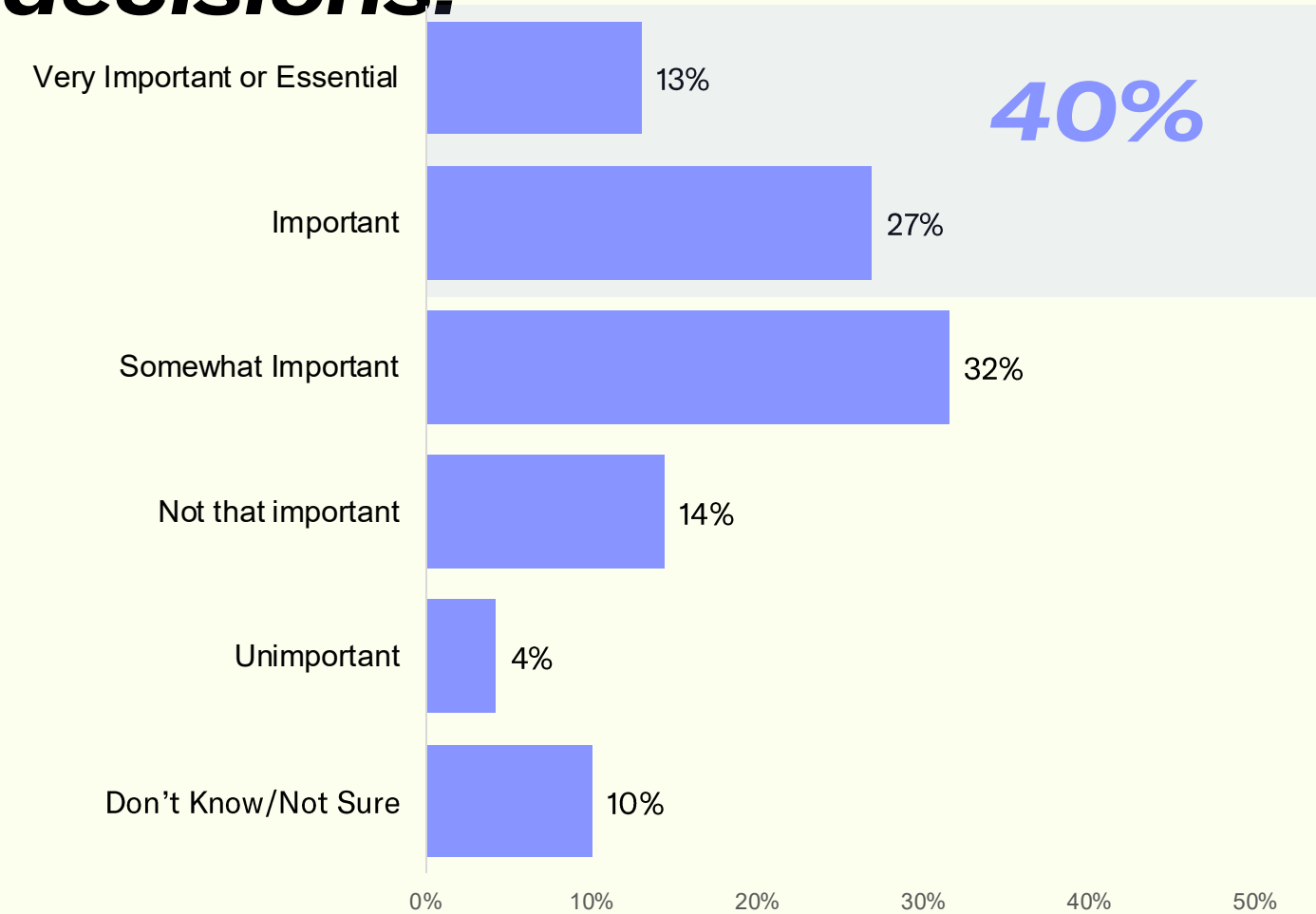


Amongst DMO-aware Americans, 43% are familiar with their DMO's work; Millennials are most familiar.



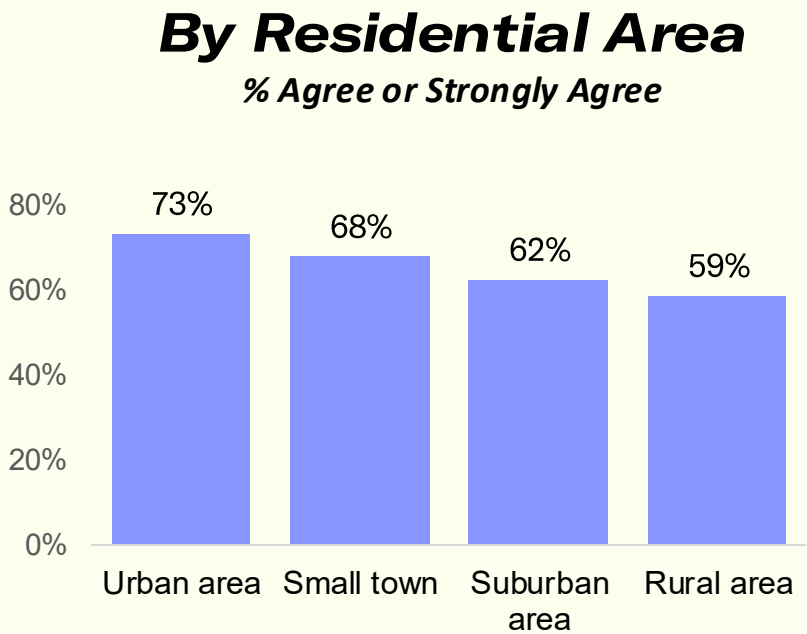
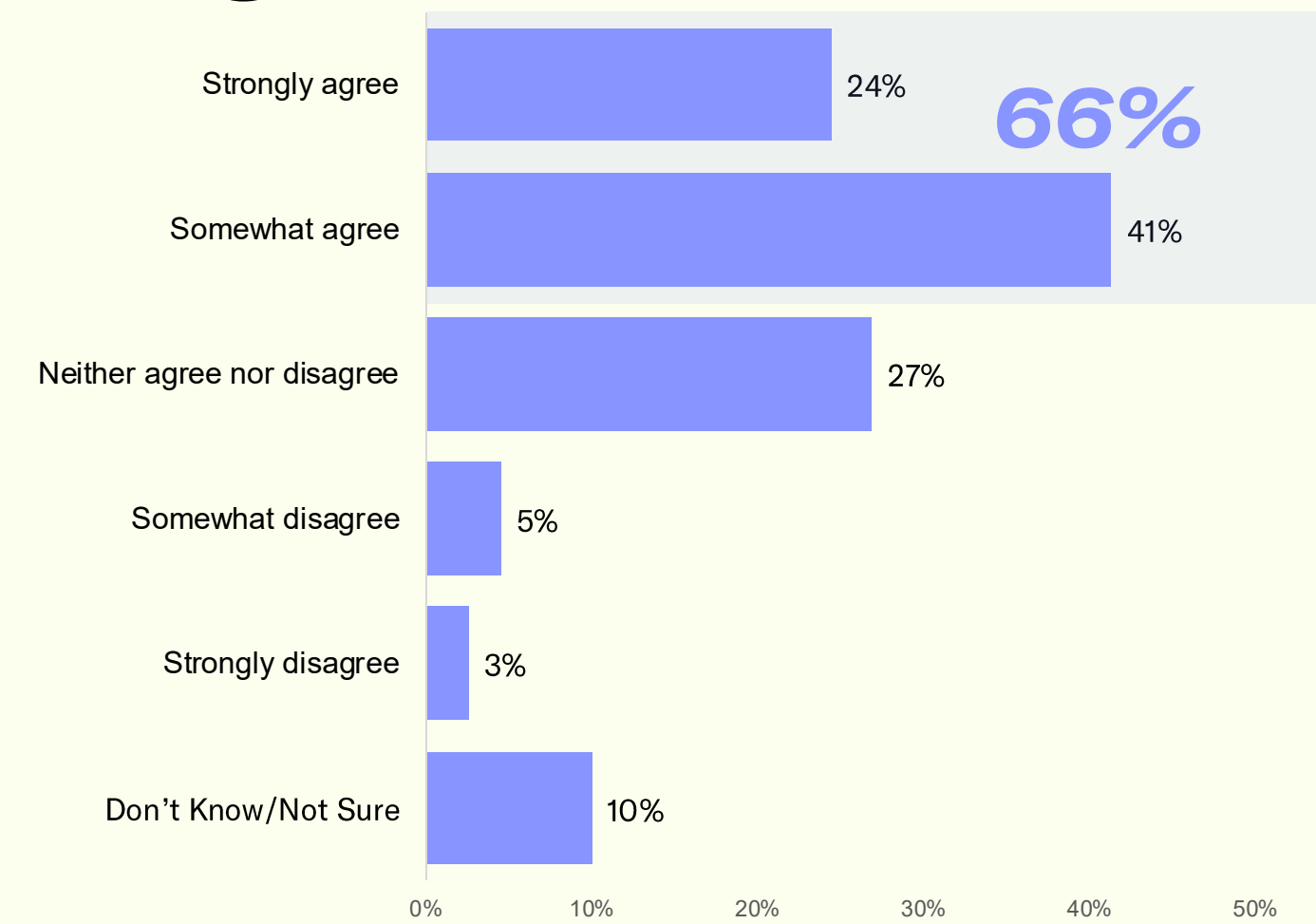
Question: How familiar are you with the work done by this organization (i.e., your community's official tourism marketing organization)?

Four in ten American travelers say it is important that residents have input into tourism planning decisions.



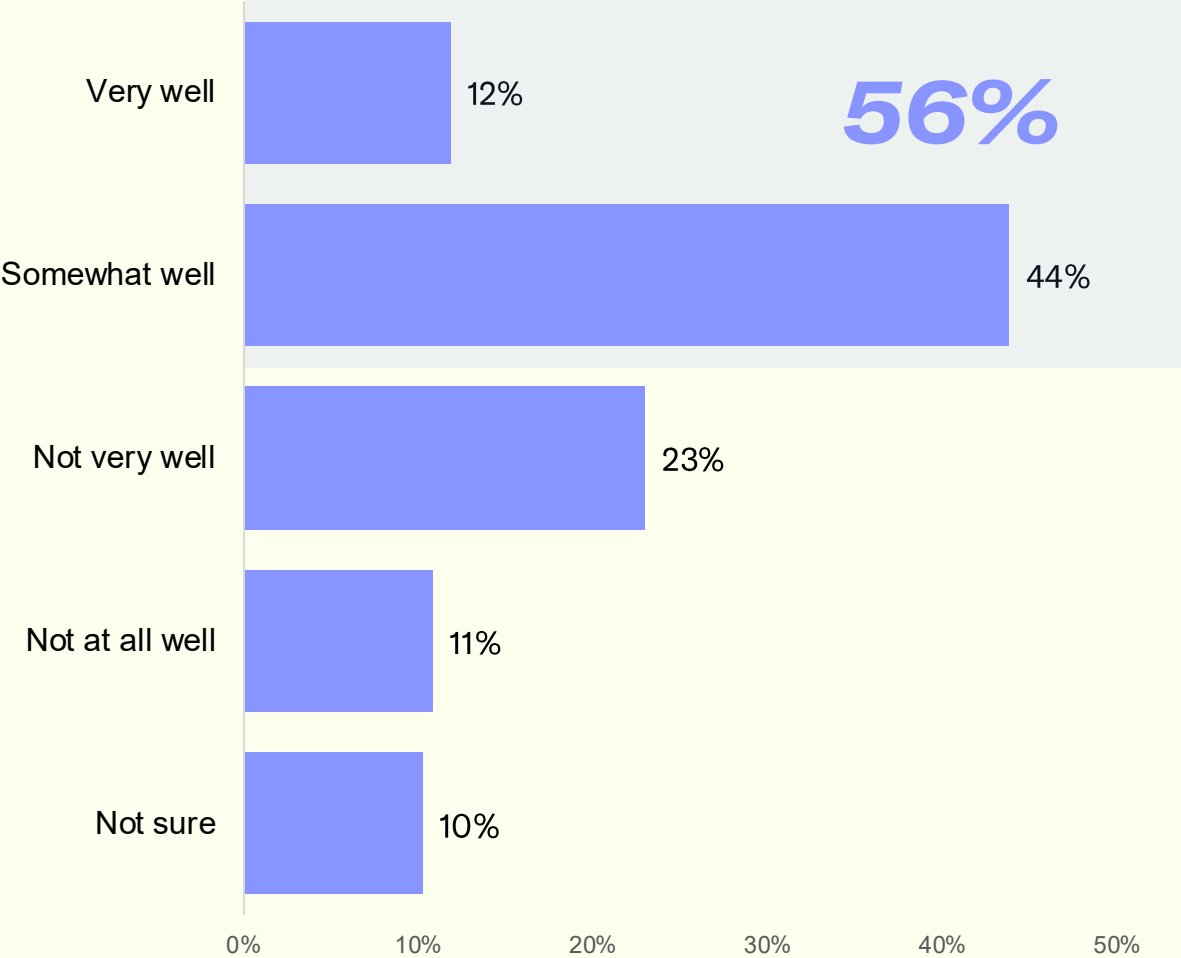
Question: In your opinion, how important is it that your community’s residents have input on tourism planning and management decisions?

Two-thirds agree that residents should have a voice in how tourism in their community is developed and managed.

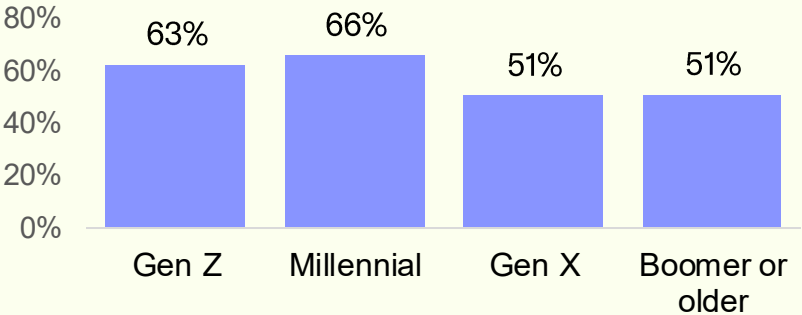


Question: How much do you agree or disagree with this statement: “People who live in my community should have a voice in how tourism is developed and managed.”

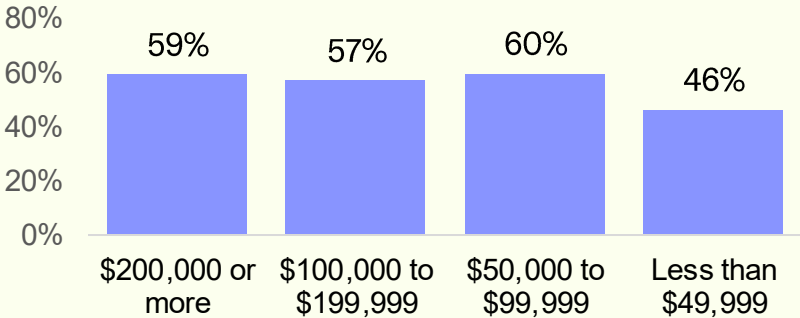
More than half say that their local government and DMO currently listen well to resident opinions.



By Generation
% Agree or Strongly Agree



By Income
% Agree or Strongly Agree



Question: How well do you think your local government and tourism marketing organizations currently listen to residents when making tourism-related decisions?

“How should communities balance welcoming visitors with preserving what locals love?”

Future Partners

**We Asked Leisure
Travelers...**



The State of the American Traveler

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Livestream Calendar

Does You or Your CEO Have a Burning Question?

Join Future Partners' Year End Omnibus

- *Audience:* American General Traveling Population
- *Timing:* Fields in December, Results Delivered by EOY
- *Pricing:* 5 Questions for \$5k (Limitations apply)



SURVEY

What percentage of your local residents do you believe would generally agree with this statement: ***I believe tourism in my community makes it a better place in which to live?***

Choose one of the following:

- **80-100%**
- **60-80%**
- **40-60%**
- **20-40%**
- **<20%**
- **Don't know/Not sure**

SURVEY

In describing the impacts of tourism in their community, which two positive and two negative statements would your residents most likely agree with?

Select one or two positive and one or two negative statements.

- **Positive Impacts**
 - **Tourism helps support local businesses**
 - **Visitor spending generates funding for community services**
 - **Tourism supports events that I enjoy as a resident**
 - **Tourists are respectful of my local community**
- **Negative Impacts**
 - **Tourists bring crowds, congestion and traffic to my community**
 - **Tourism negatively impacts the county's natural areas**
 - **There are too many tourists in my local community**
 - **I am worried about the impact of tourism on our community culture**

A light blue line-art pattern of a city street grid is overlaid on a solid blue background. The grid consists of various rectangular blocks and intersecting lines, creating a complex urban layout.

Panel Discussion

Community Engagement

Today's Panel



Lucy Kay

*President,
Breckenridge
Tourism Office*



Richard Gibbs

*Director of Corporate
Communications &
External Affairs,
Greater Miami CVB*



Chelsea Ruby

*Tourism Secretary,
West Virginia
Department of
Tourism*



Breckenridge, Colorado



Breckenridge, Colorado



Breckenridge, Colorado



Breckenridge, Colorado



STICK
TO THE
TRAIL



Enjoy
Breckenridge's
100+ MILES
OF TRAILS

Our best foot forward
in these trail tips:

our route and bring a map.
Stick to the trail.
Yield to uphill trail users.
Hikers yield to hikers.
Be present and mindful.
Don't take shortcuts.
Keep your distance from wildlife.
Be friendly to other trail users.
Run and ride single-file.
Bring extra layers.
Stay hydrated.
Pack it in. Pack it out.

QR code for full trail guide

ON THE
TRAIL
*leave only
footprints*



Learn more about how you can B Like Breckenridge



WE'RE
PROUDLY
PAPER-FREE
Serving over
6
MILLION
VISITORS
ANNUALLY



Activity
of the
Week
Country
Song
Music

What-Do
of the
Week
Drama
Read
Pet
Drama

What-Do
of the
Week
Drama
Read
Pet
Drama

INFORMATION





TOURISM BUSINESS ENHANCEMENT INITIATIVE



Advocate, support and strengthen the economic sustainability and access of our multicultural communities and heritage related businesses within the Greater Miami & Miami Beach.

Business Graduation



Small Business Workshop



Entrepreneur small
business training



Professional business
workshop series



GMCVB partnership
development and
engagement



Educational resource



Advocacy and
community outreach

Multicultural Tourism & Development

TOURISM BUSINESS ENHANCEMENT PROGRAM



GREATER MIAMI
CONVENTION &
VISITORS BUREAU

The Tourism Business Enhancement Program (TBE) Advocates, Supports and Strengthens the economic sustainability and access of our multicultural communities and heritage-related businesses within Greater Miami & Miami Beach.

This Initiative is led by the Greater Miami Convention & Visitors Bureau's Multicultural Tourism & Development Department in an effort to support small businesses directly and indirectly impacted by Tourism.

INITIATIVES



Entrepreneur Small Business Training



Professional Business Workshops



GMCVB Partnership Development
and Engagement



New Business Referral
and Vendor Opportunities



Strategic Marketing Support



Technical Assistance
and Resource Support



Advocacy and Community Outreach



Educational Resource &
Enrichment Program Referrals

The Art of Black Miami Marketing platform is also a component under the TBE program. To learn more specifically about that program, visit ArtofBlackMiami.com



AI Workshop at OPAC



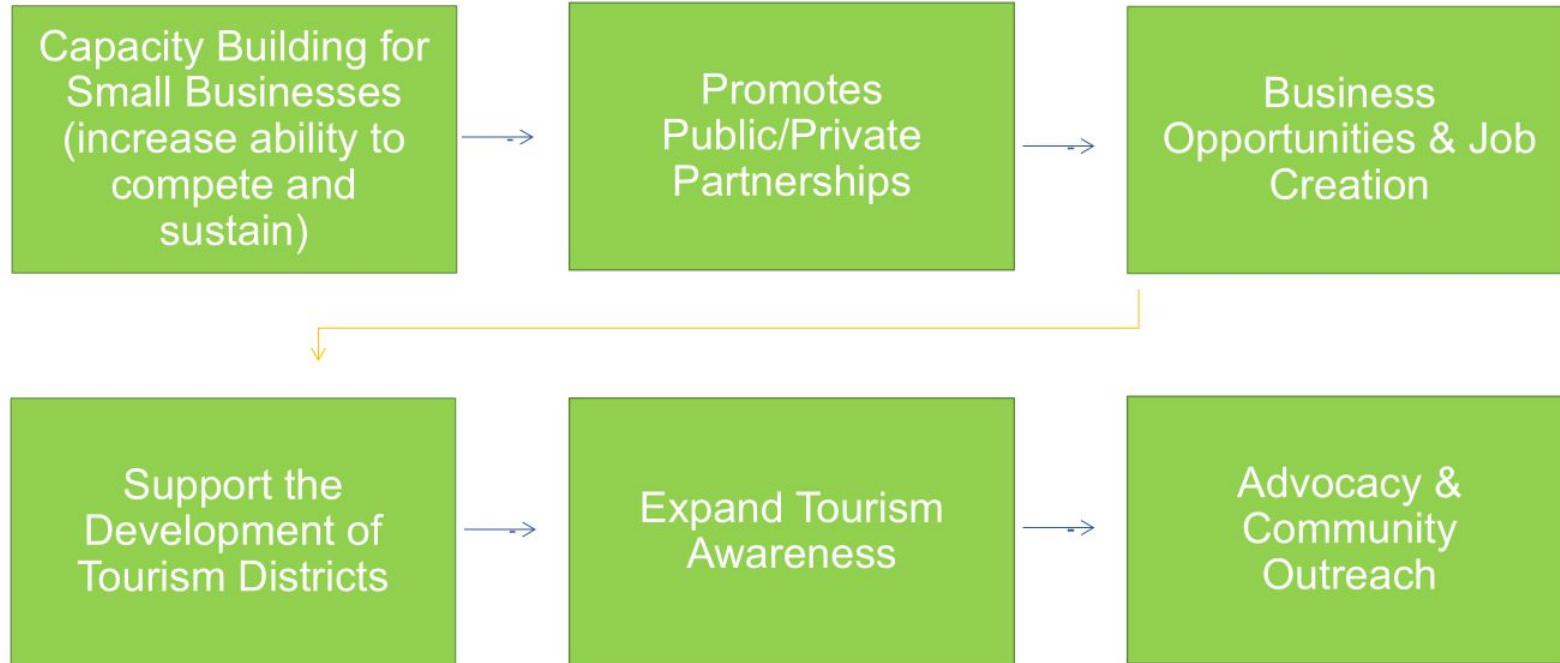
GREATER MIAMI
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POWERED BY:



Multicultural Tourism & Development -Tourism Business Enhancement

IMPACT



ART OF BLACK MIAMI

Marketing platform and destination driver that showcases the diversity of the visual arts locally, nationally and internationally, celebrating the black diaspora

ArtofBlackMiami.com



ARTS & CULTURE



Visitor Industry Council

BROUGHT TO YOU BY, AND IN COLLABORATION WITH

THE MIAMI
FOUNDATION

Dear VIC Family,

Your support makes dreams possible. This Give Miami Day (Nov. 15–20), we invite you to see the impact of your generosity through the story of Christian Barrios-Brens, a VIC Scholar whose journey has been shaped by the opportunities, mentorship, and community that your support provides.

📺 Watch Christian's story below and see how VIC helps students like him turn passion into purpose.

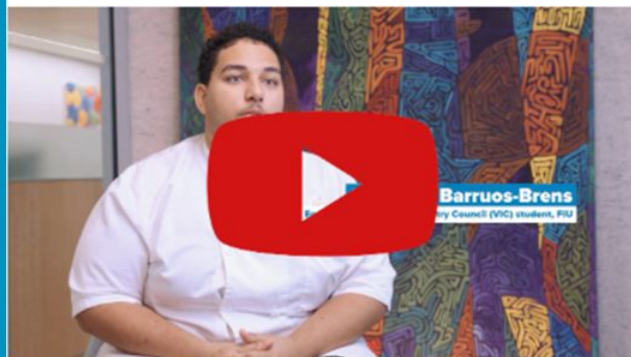
Every contribution, big or small helps fund student scholarships, career development, and leadership programs that shape the next generation of tourism and hospitality professionals.

📅 Early giving opens November 15, and Give Miami Day culminates on November 20.

Together, let's keep investing in their success!



LEARN MORE >



Mark your calendar



Meet the VIC's Give Miami Day Team



Graylyn Swilley-Woods, Ph.D.

Executive Director, VIC, Multicultural
Tourism & Development

✉ SEND EMAIL



Vernon K. Chipman

Program Manager, VIC, Multicultural
Tourism & Development

✉ SEND EMAIL



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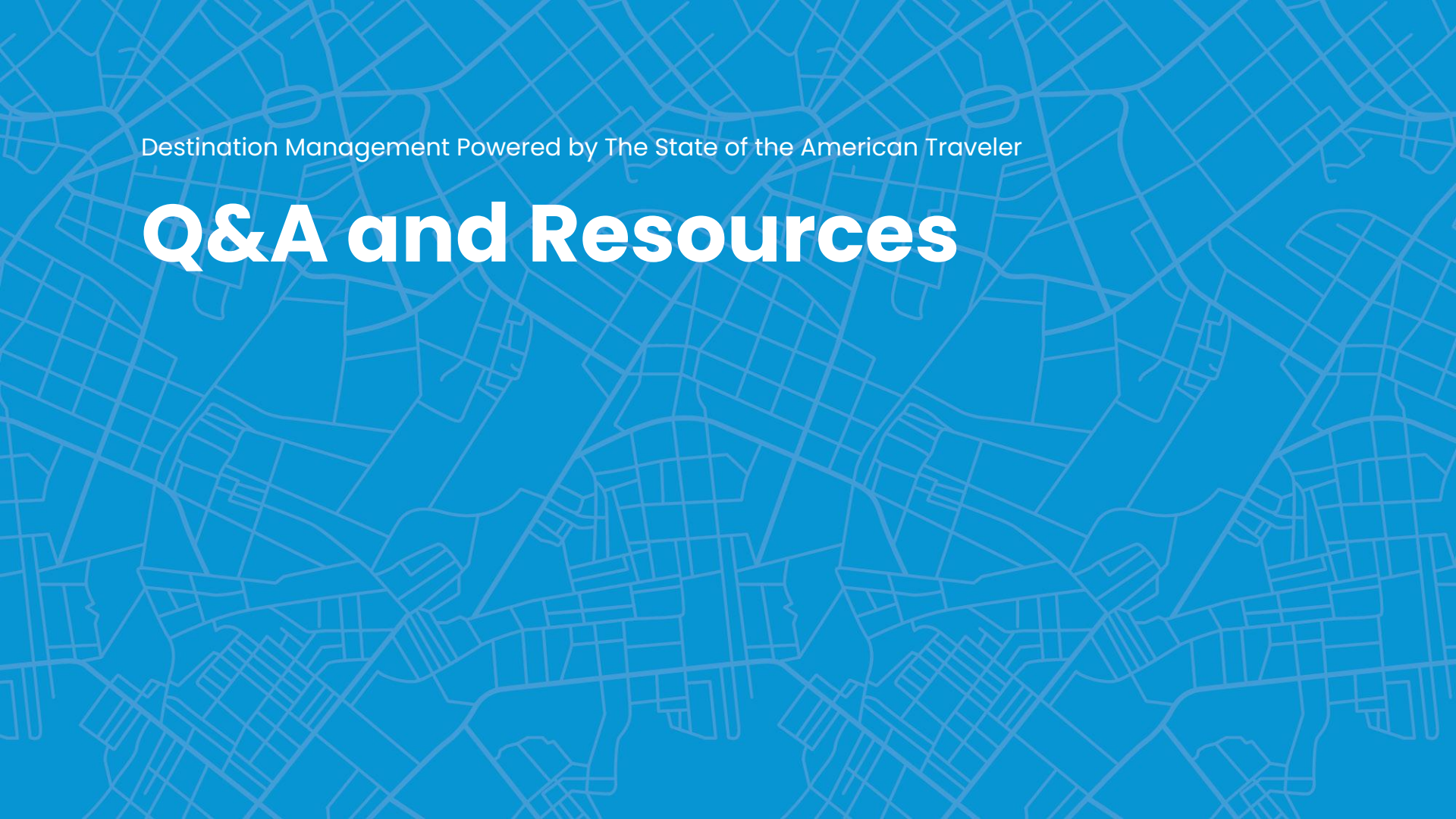
MUSEUMS

NATIONAL COAL
HERITAGE AREA

VOLUNTEER WV

WEST
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DEPARTMENT OF TOURISM

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The background of the slide is a solid blue color with a white line pattern that resembles a city street map or a network of roads. The lines are thin and vary in thickness, creating a complex, interconnected grid-like structure.

Destination Management Powered by The State of the American Traveler

Q&A and Resources

Research and Webinar Resources

Research, slides and other resources will be available at:

www.milespartnership.com/SAT

www.futurepartners.com



Quarterly Research Powered by of The
State of the American Traveler



COMMUNITY ENGAGEMENT PROGRAM

Expression of Interest

Community Engagement Best Practices & Education for DMOs





Q&A

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