

Future Partners



The State of

Galveston Travel

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Bringing the future of travel
within reach

Future Partners

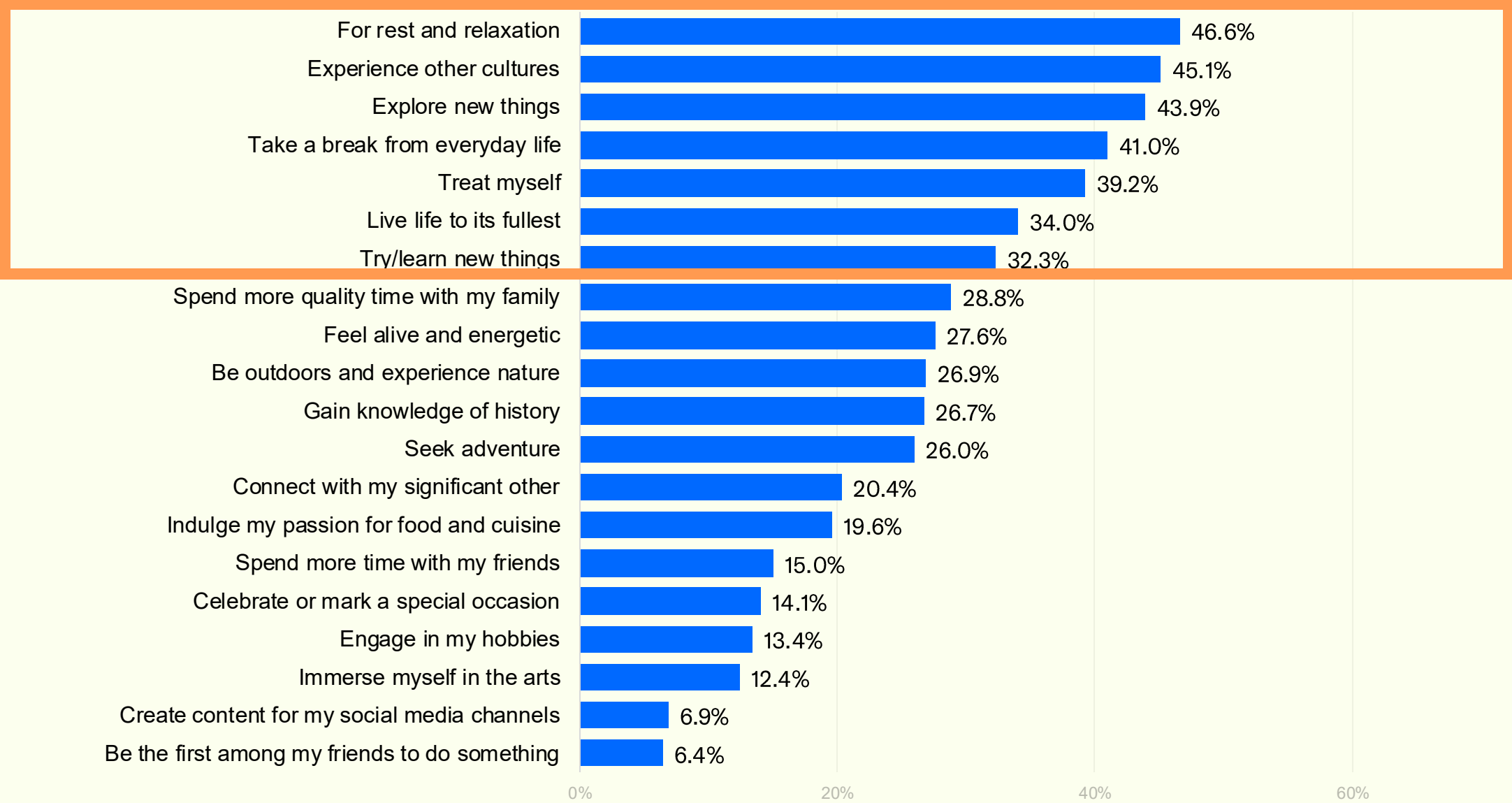
The State of the International Traveler

- Tracking study conducted since 2014
- Online survey methodology
 - Screened for likely international travel in the next 3 years
- Over 800 fully completed surveys were collected from a random sample of likely international travelers in each market
- In total, 13,200 completed surveys were collected



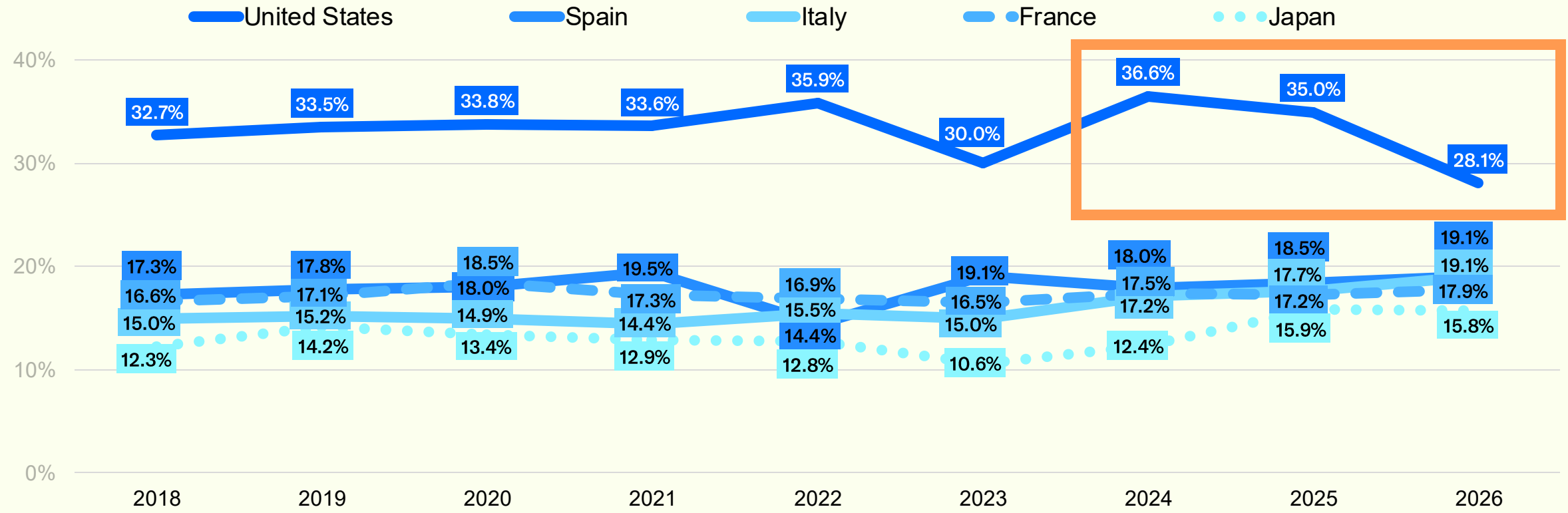
	SAMPLE SIZE
Argentina	825
Australia	825
Brazil	825
Canada	825
China	825
Colombia	825
France	825
Germany	825
India	825
Italy	825
Japan	825
Mexico	825
Netherlands	825
South Korea	825
Spain	825
United Kingdom	825
TOTAL	13,200

General Drivers of Travel



The U.S. remains the most top-of-mind global destination but amongst a record-low share of global travelers.

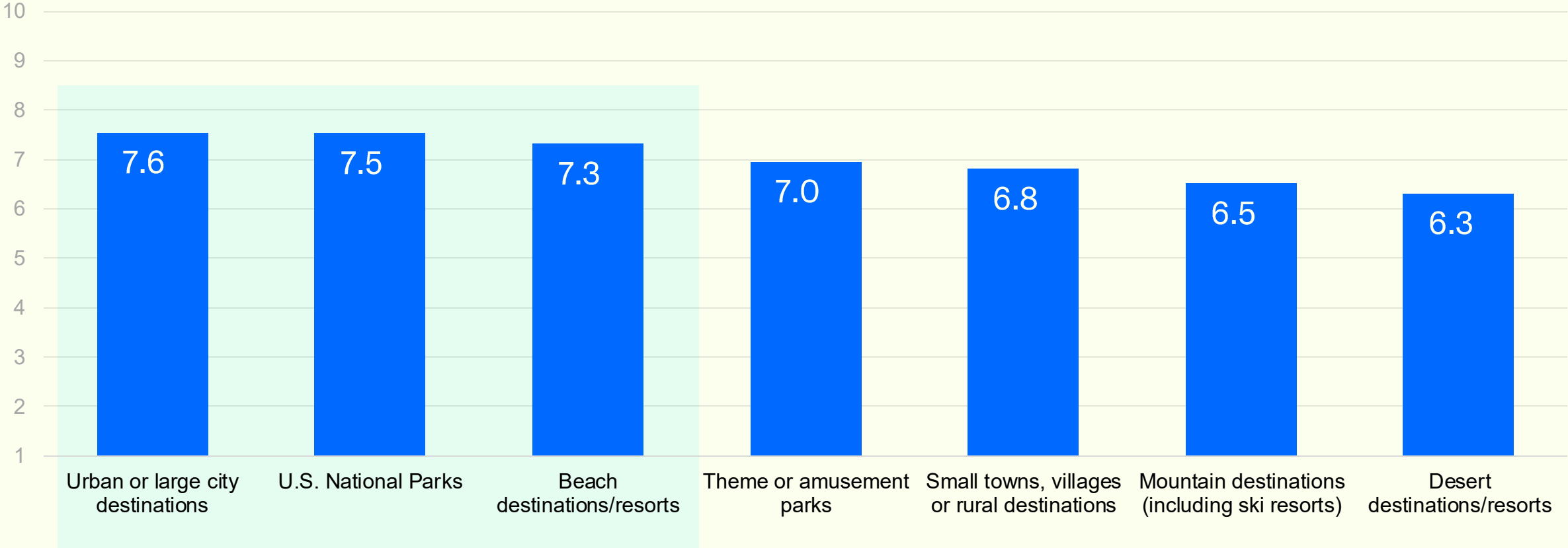
Desired International Destinations: Unaided Rankings 2018 - 2026
(Total Aggregate)



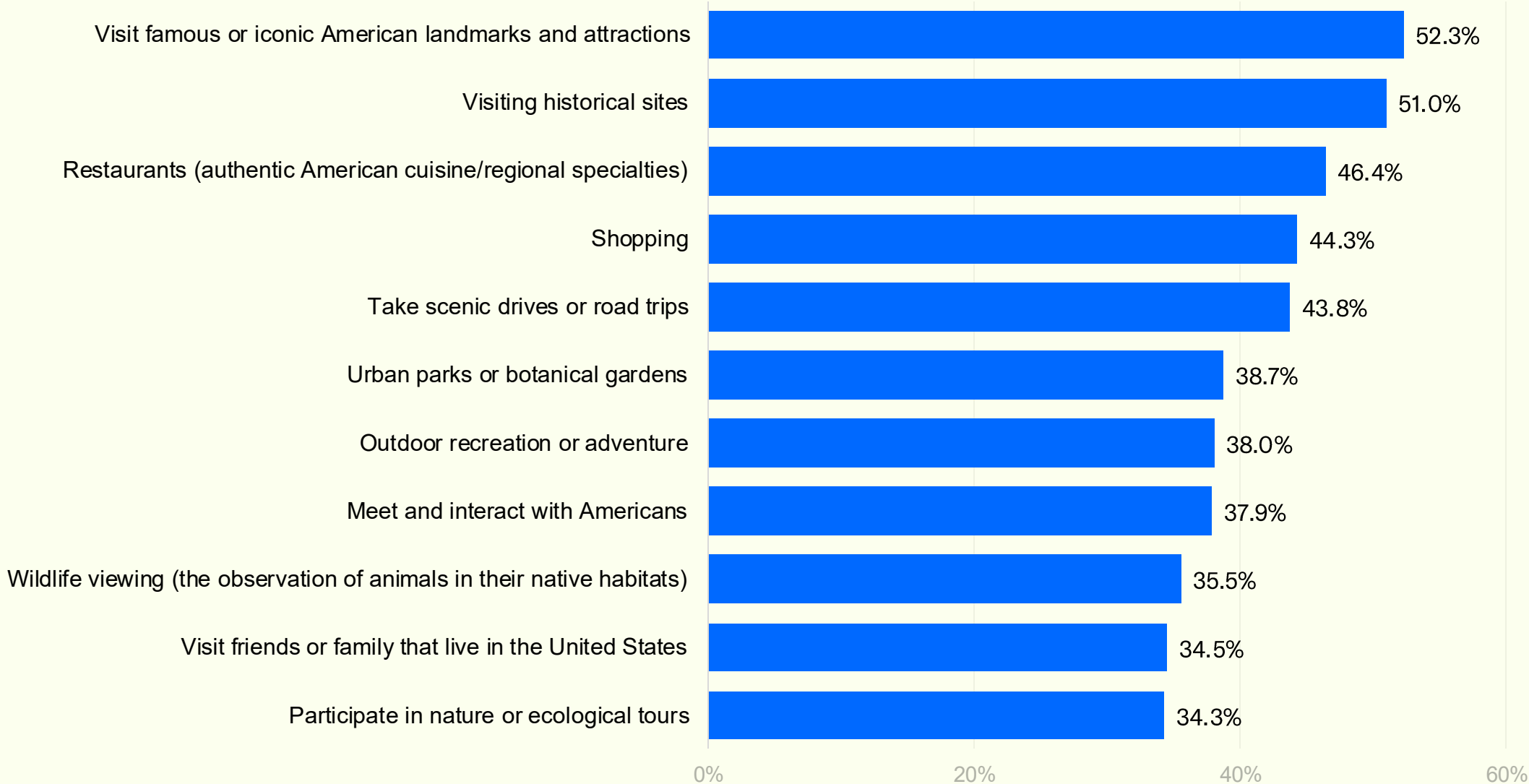
Excitement for Types of U.S. Destinations

Destination Types Most Excited to Visit

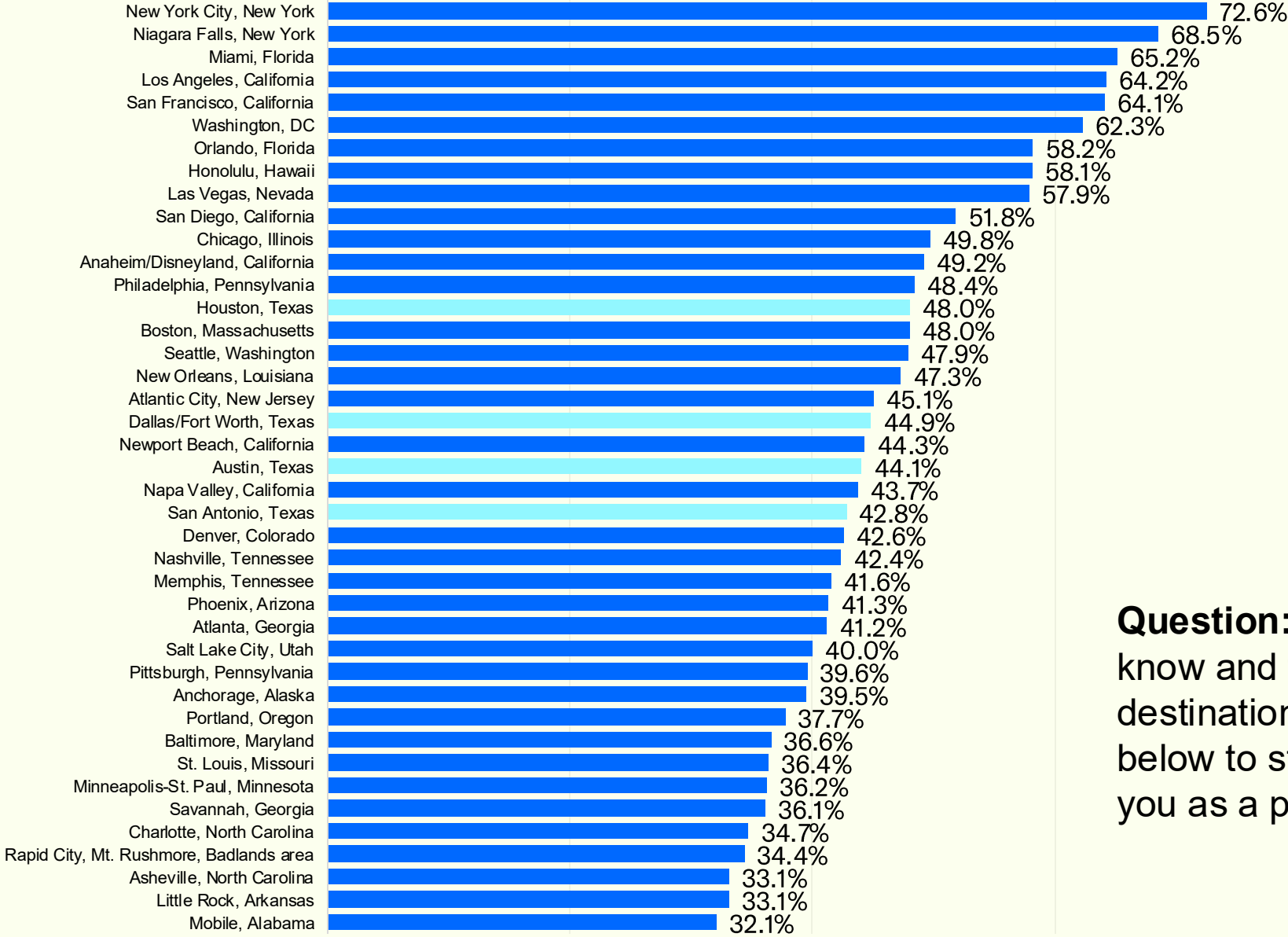
Average Excitement Score on a Scale of 1 to 10



Important U.S. Leisure Trip Experiences

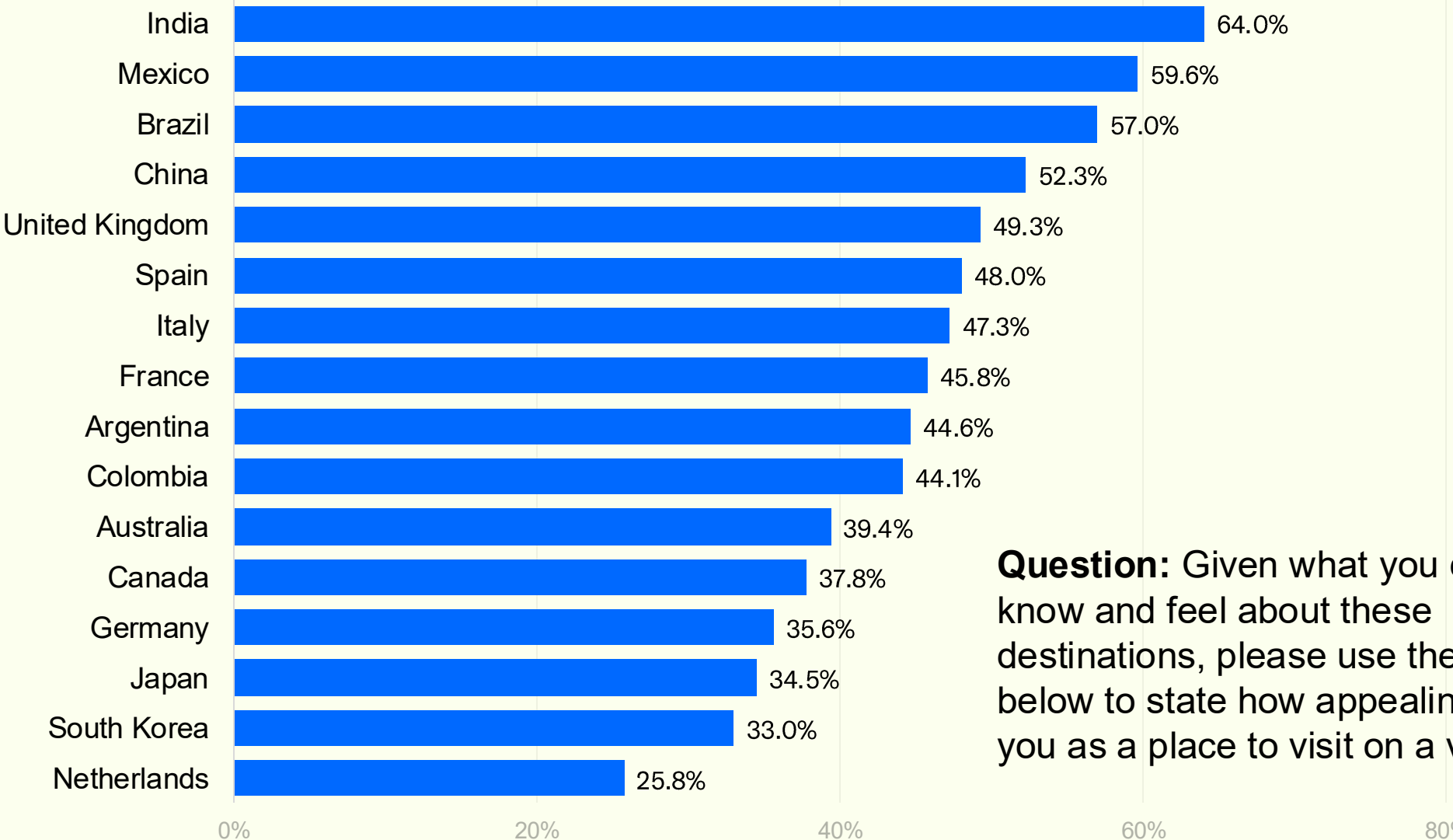


Most Appealing Destinations



Question: Given what you currently know and feel about these destinations, please use the scale below to state how appealing each is to you as a place to visit on a vacation?

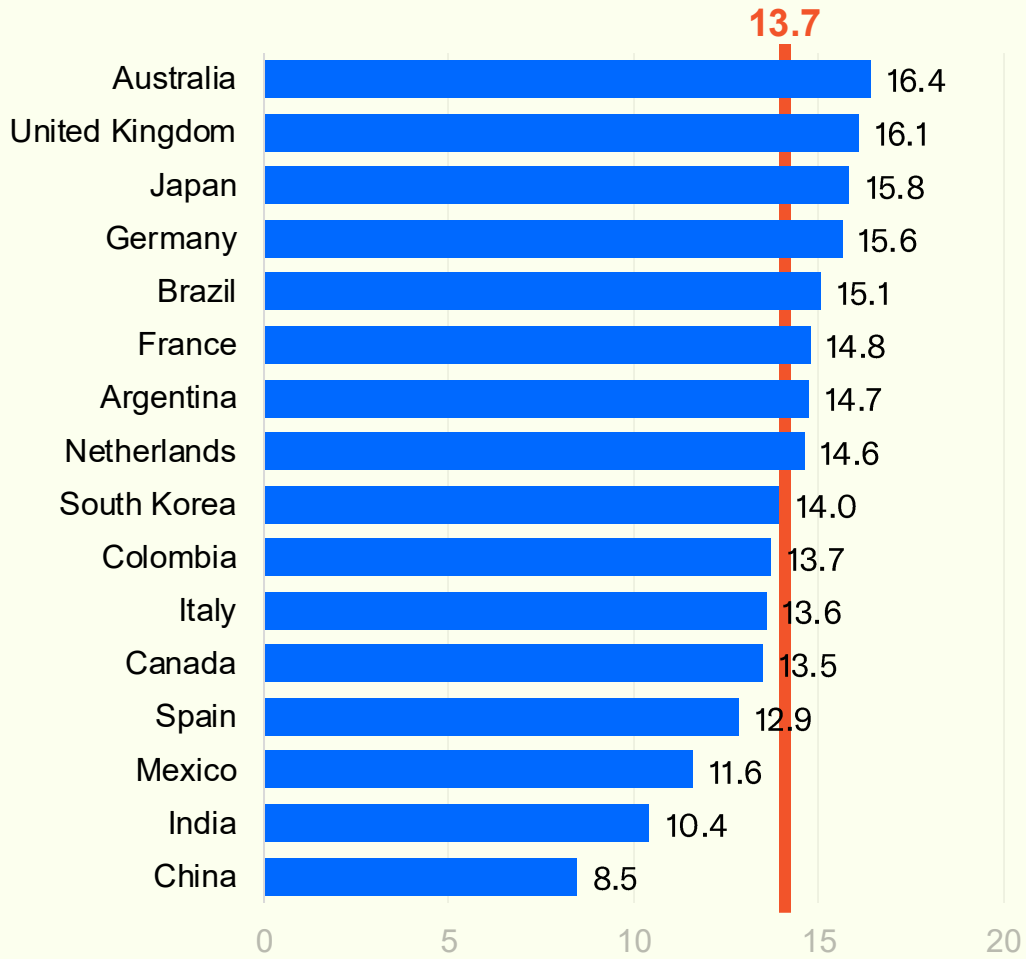
Countries Who Find **Texas** Most Appealing



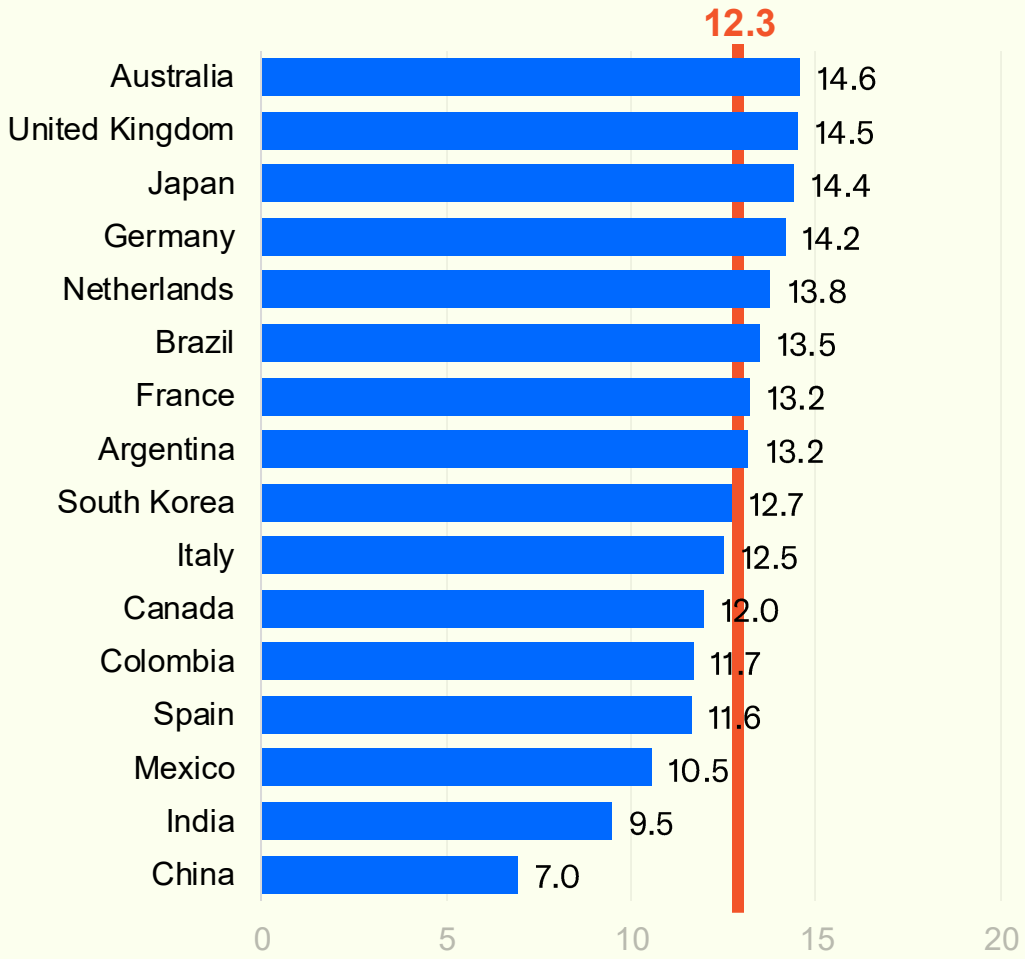
Question: Given what you currently know and feel about these destinations, please use the scale below to state how appealing each is to you as a place to visit on a vacation?

Planning & Booking Windows

Advance Travel Planning
(Avg. # of weeks planned in advance)

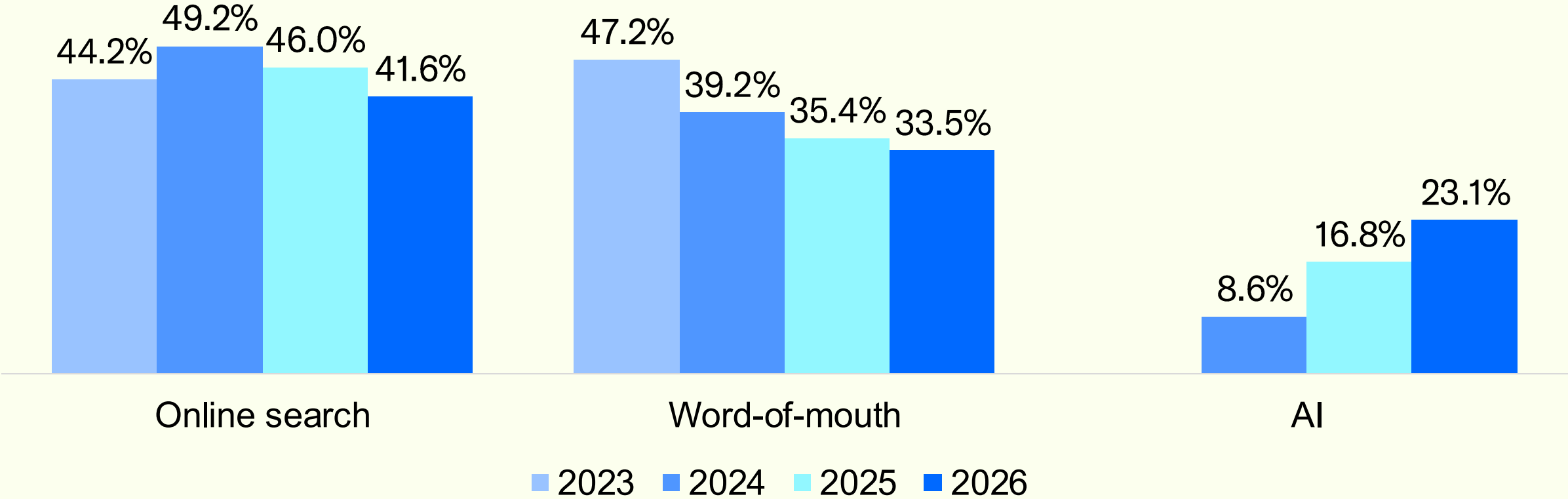


Advance Travel Booking
(Avg. # of weeks booked in advance)



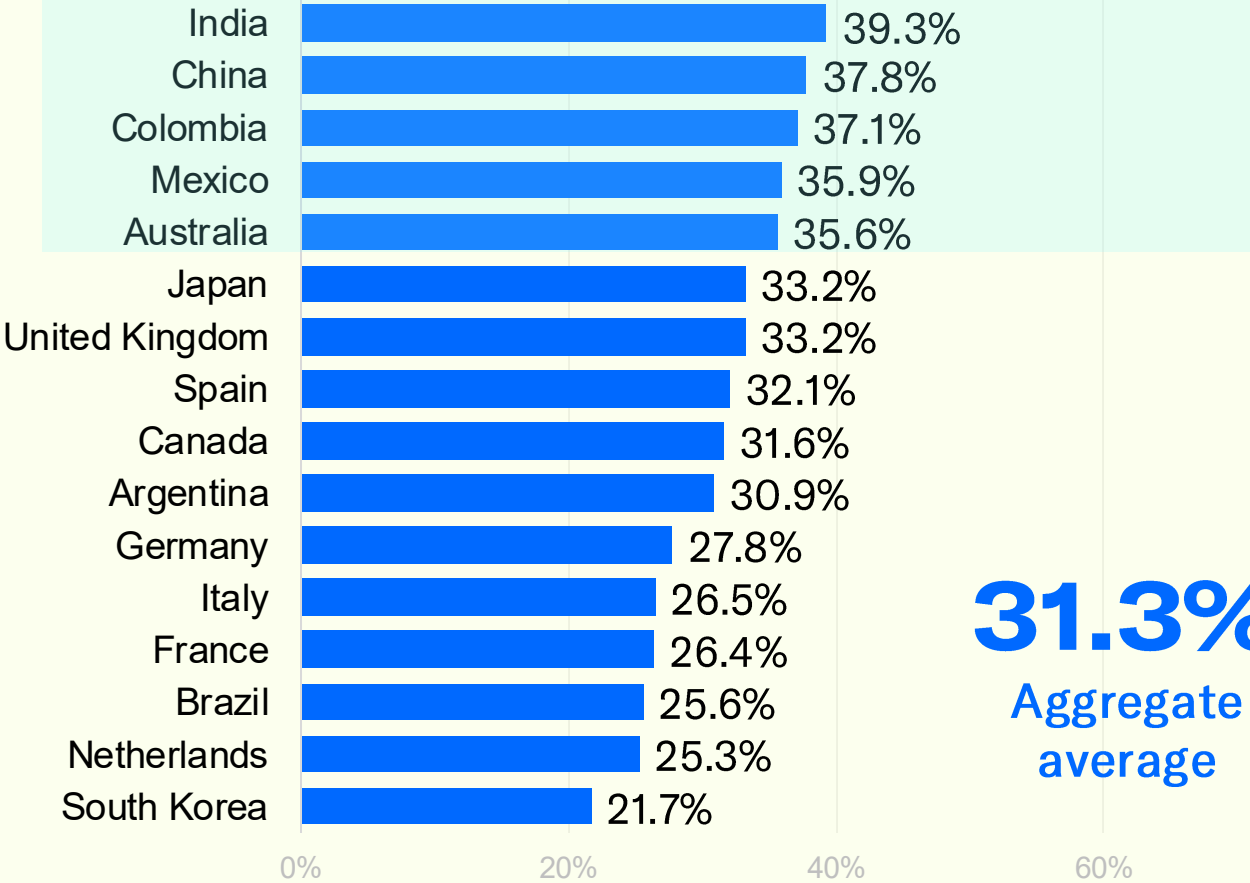
Online Search Surpassed Word-of-Mouth as the Top Source of Destination Inspiration

Sources Use for Destination Inspiration – Change Compared to Last Year
(% of Total Aggregate)

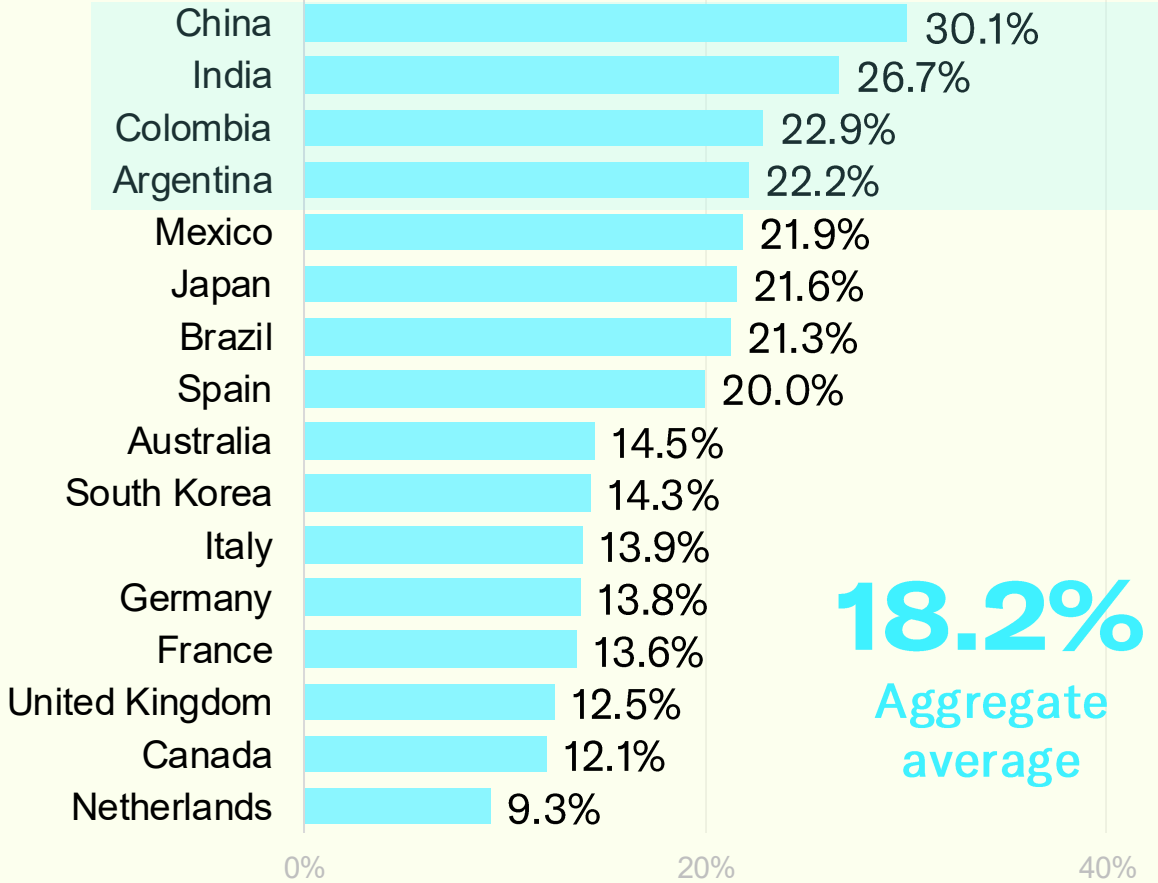


Use of Destination Marketing Organization Digital Content for Travel Planning

DMO Websites



DMO Social Media Content



Dreaming Phase

Considering Phase

Planning Phase

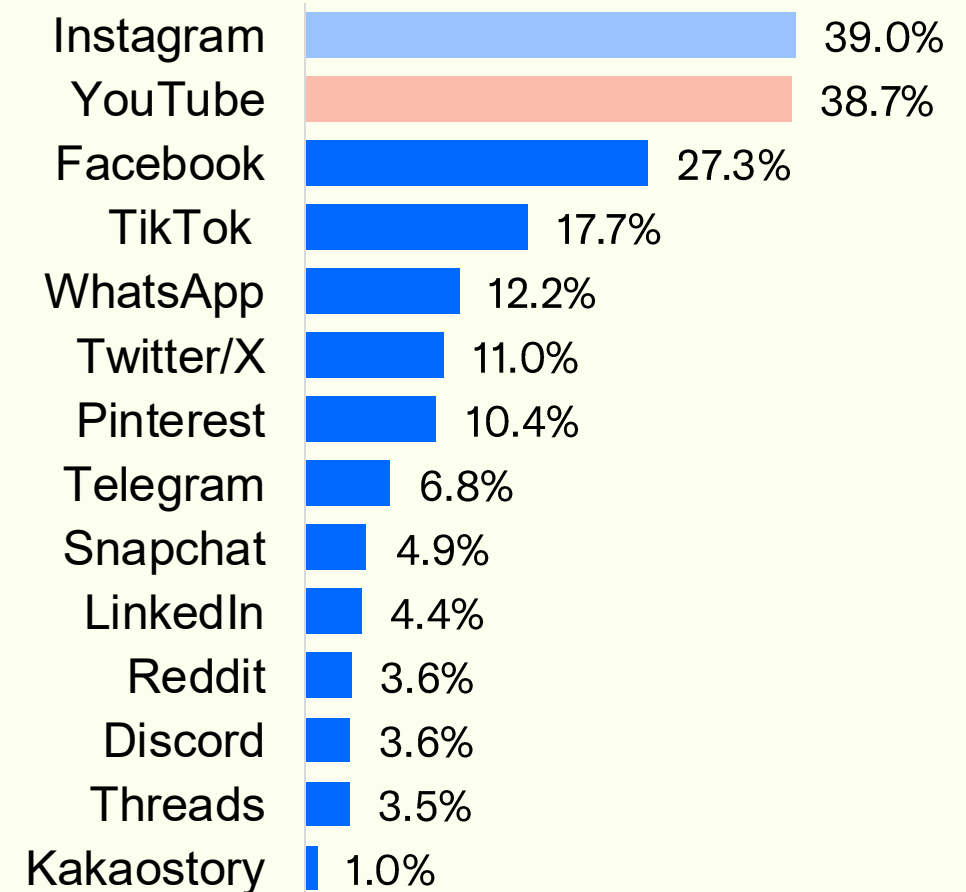
Experiencing Phase

**Post-Trip
Sharing Phase**

**Top Used Social
Media Channels
in the
Travel Planning
Journey**

Dreaming Phase

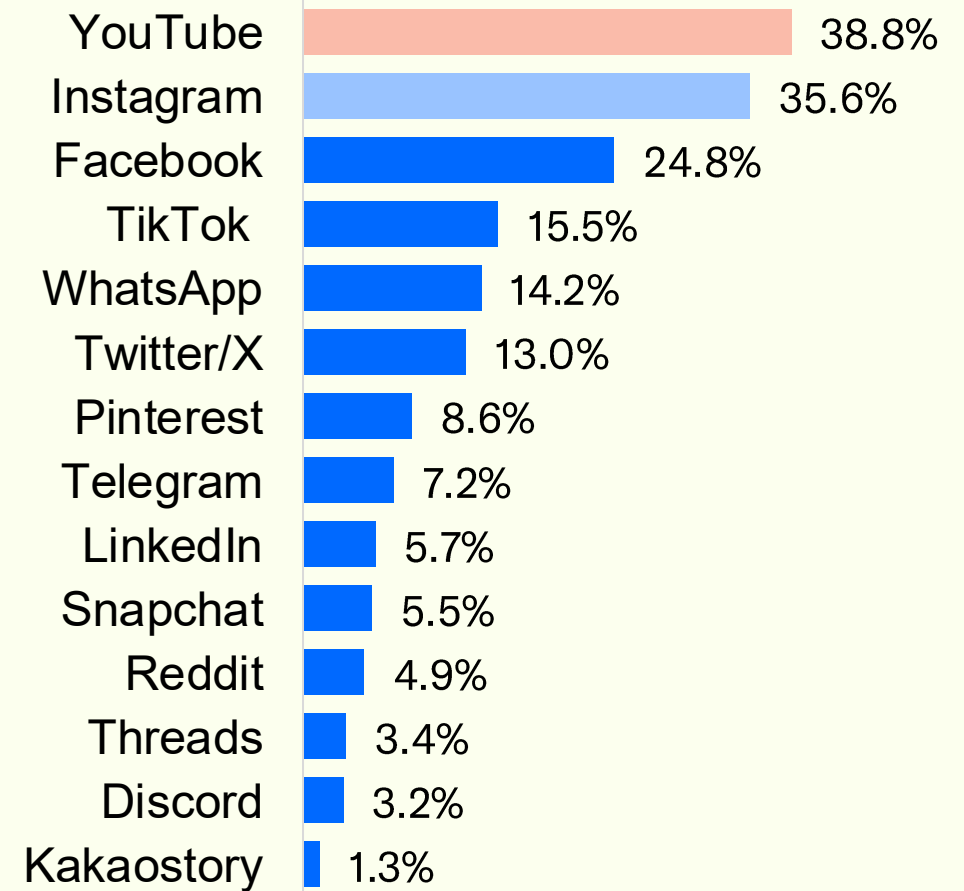
Top Used Social Media Channel



Dreaming Phase

Considering Phase

Top Used Social Media Channel

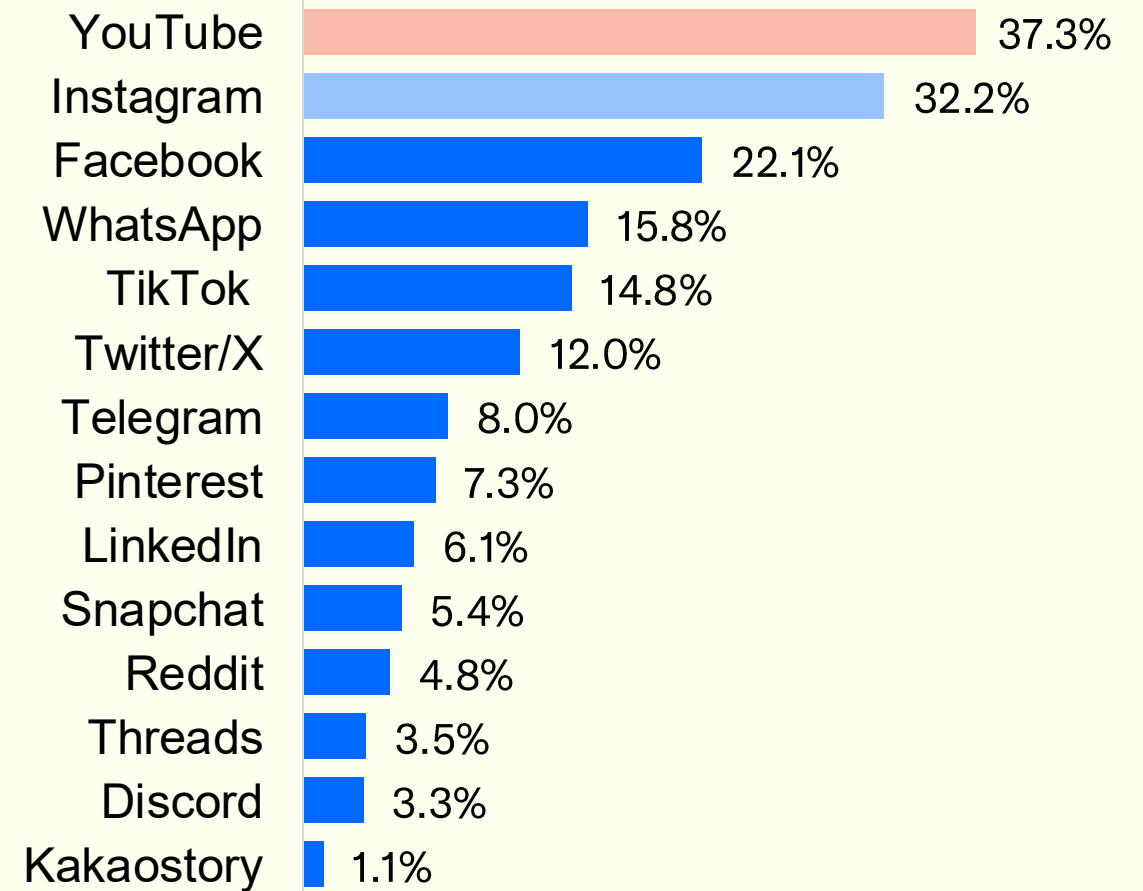


Dreaming Phase

Considering Phase

Planning Phase

Top Used Social Media Channel



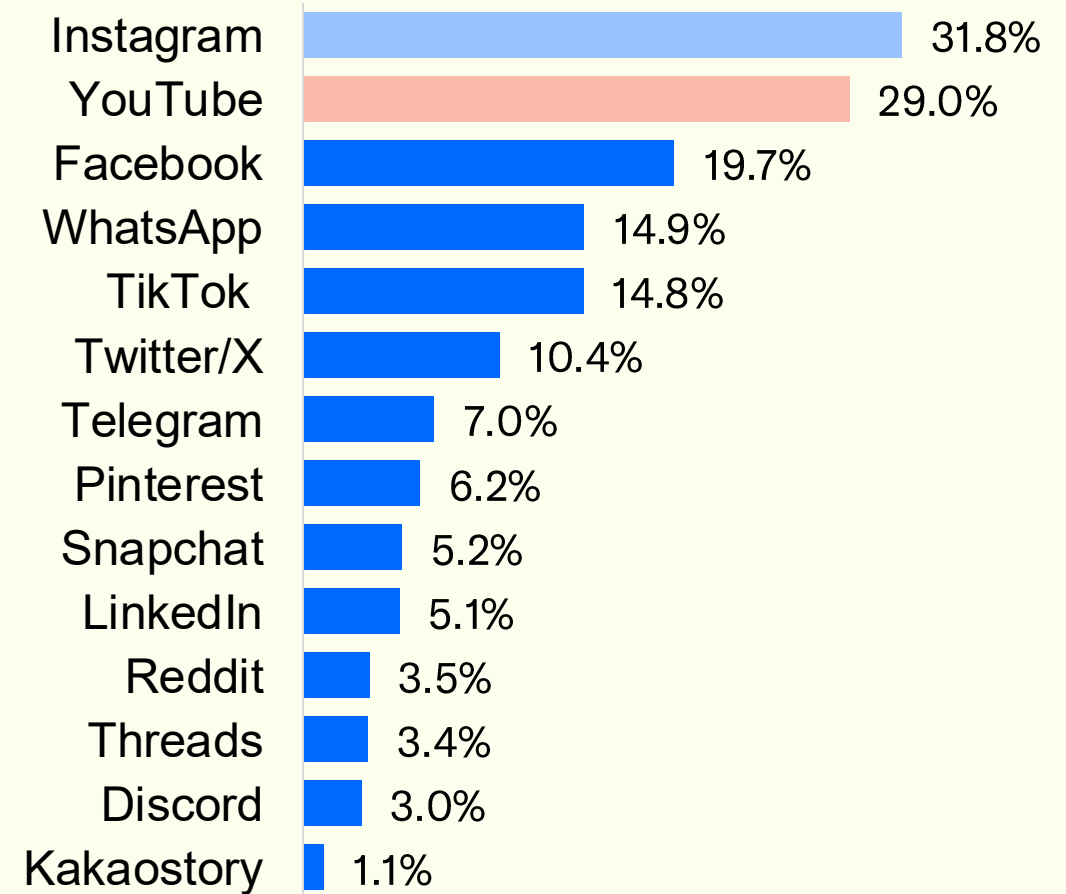
Dreaming Phase

Considering Phase

Planning Phase

Experiencing Phase

Top Used Social Media Channel



Dreaming Phase

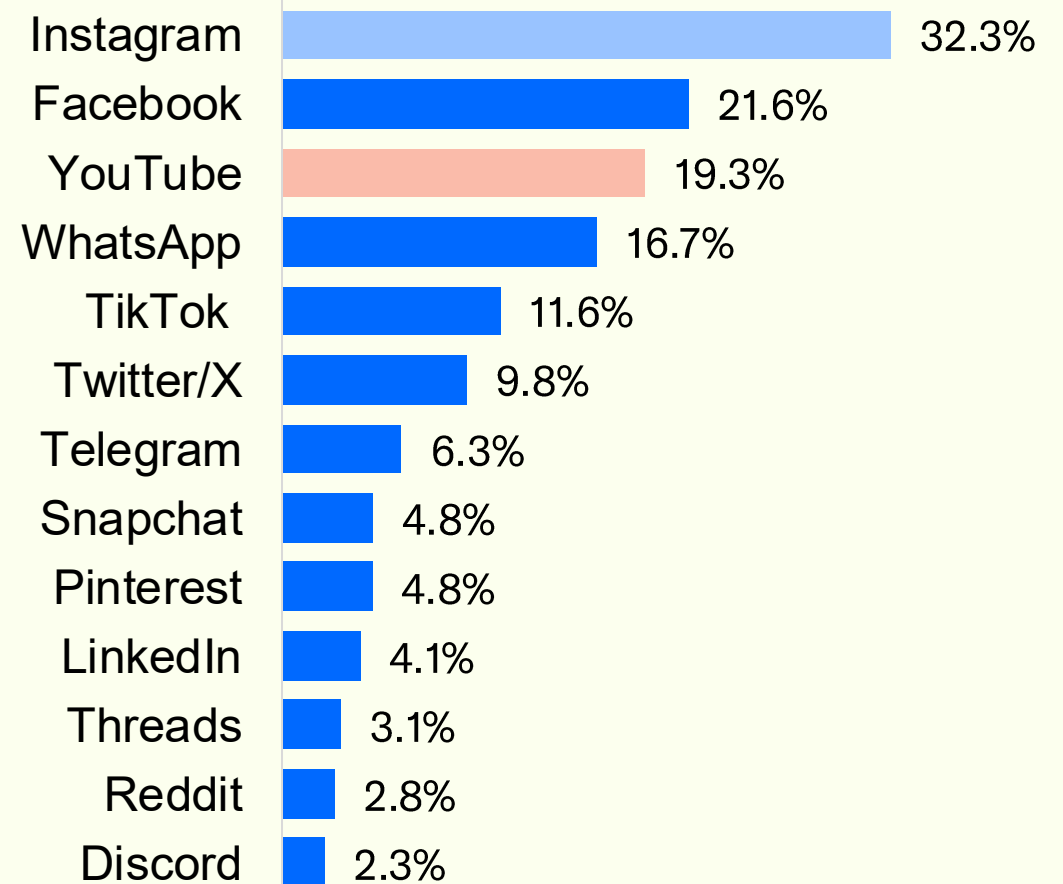
Considering Phase

Planning Phase

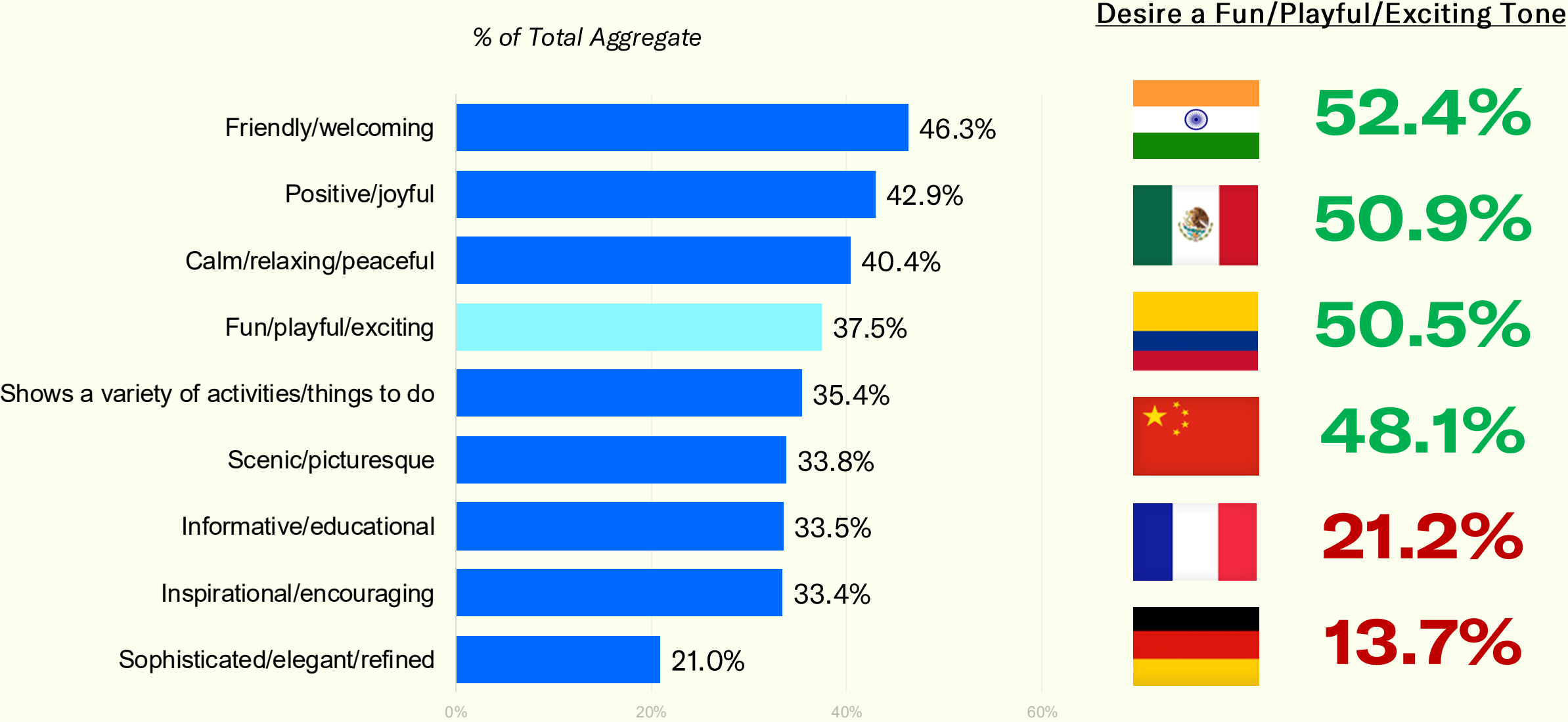
Experiencing Phase

**Post-Trip
Sharing Phase**

Top Used Social Media Channel



Desired Tone for International Destination Ads



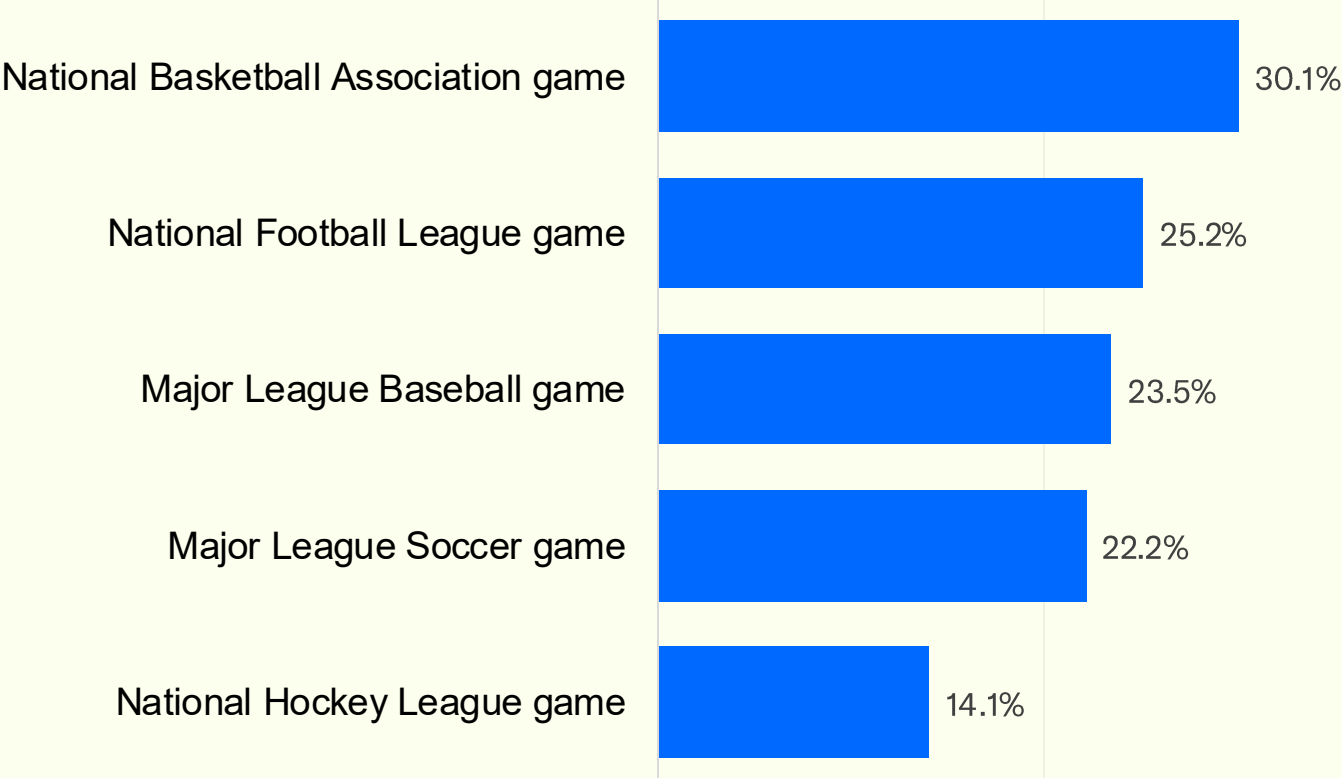
The Role of Sporting Events

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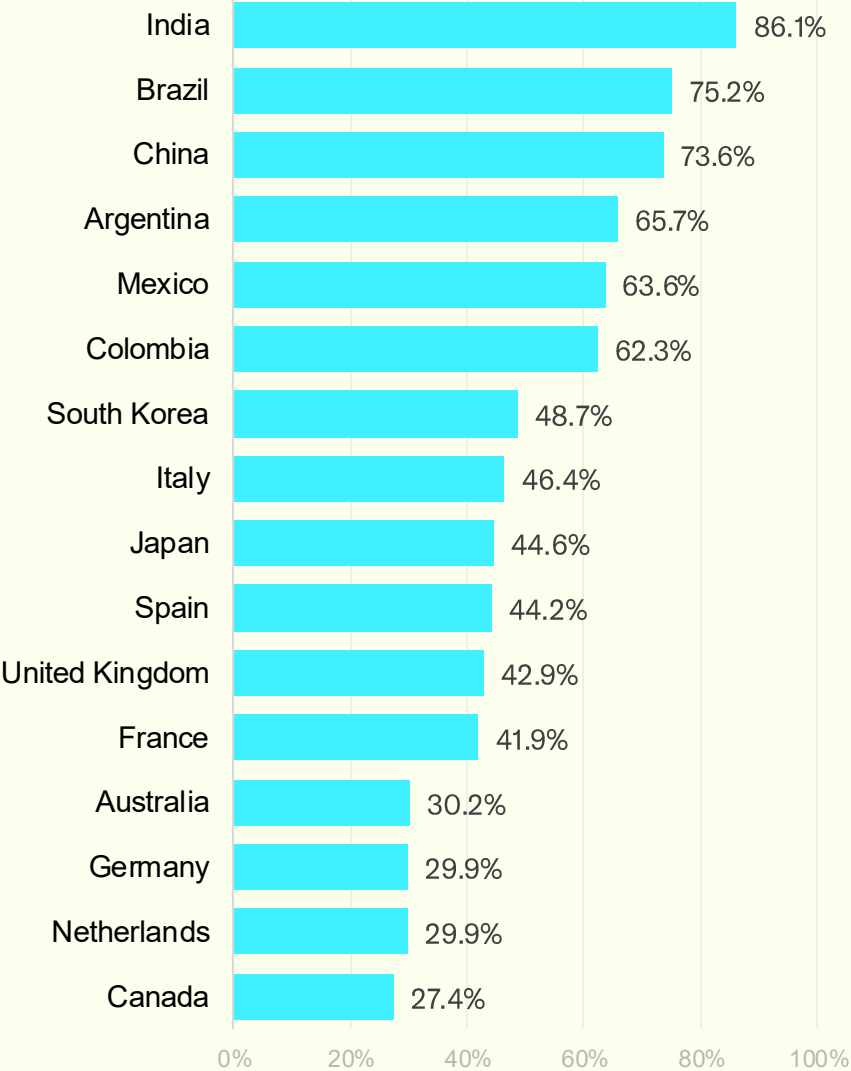
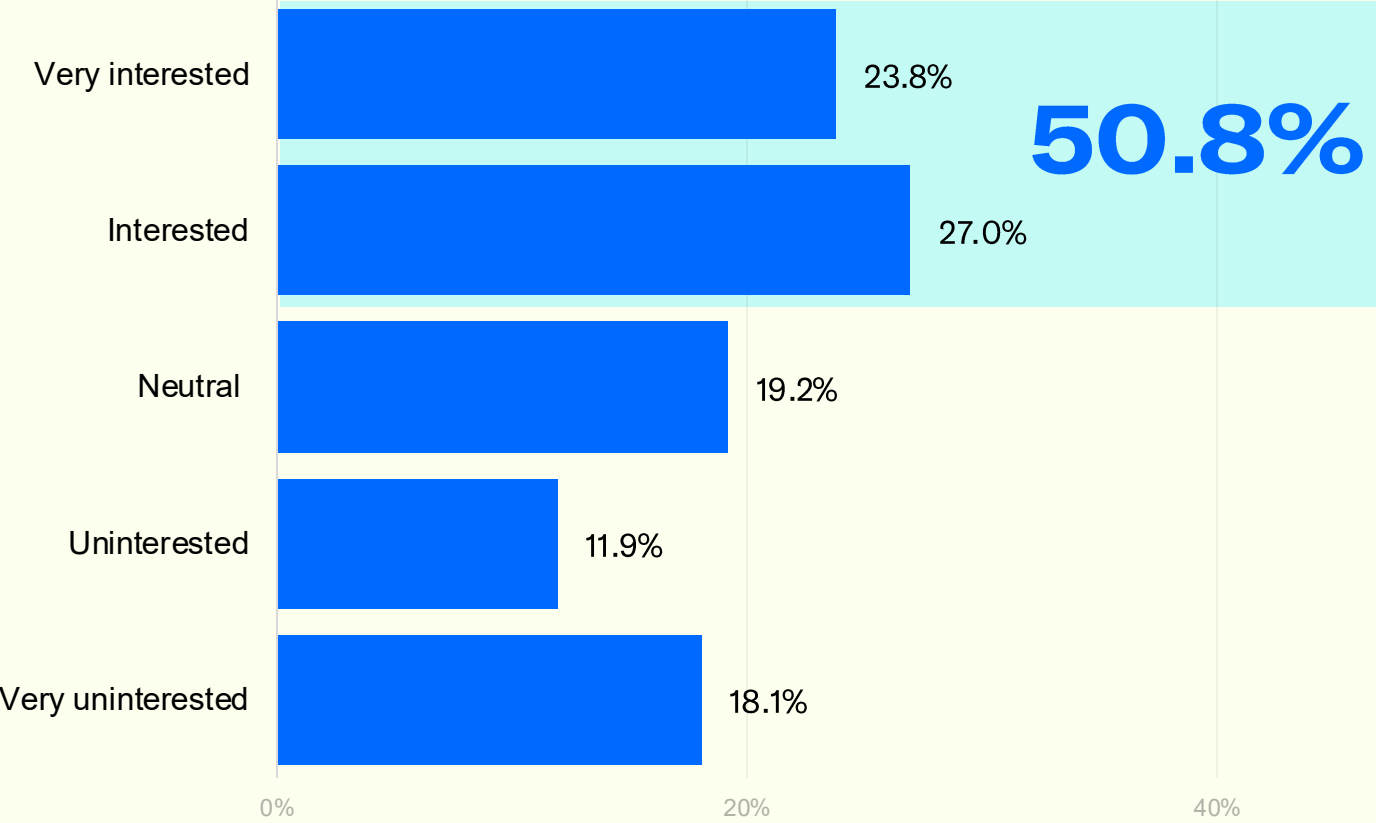
The Role of Professional Sporting Events

Professional Sporting Events Likely to Attend on a Trip to the United States
(Total Aggregate)



The Impact of the 2026 FIFA World Cup

Interest in Traveling to the U.S. for the 2026 FIFA World Cup
(Total Aggregate)

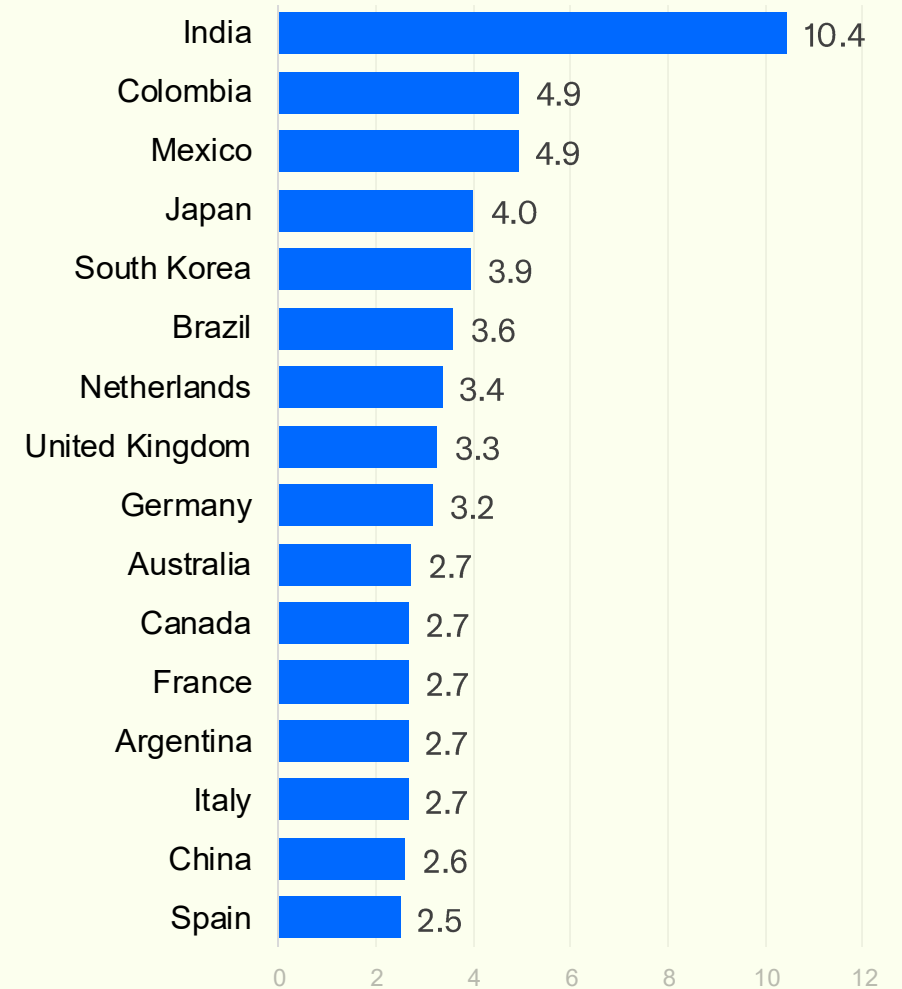


The Impact of the 2026 FIFA World Cup

2026 FIFA World Cup Hypothetical Trip –
Number of Days for U.S. Destinations Visited

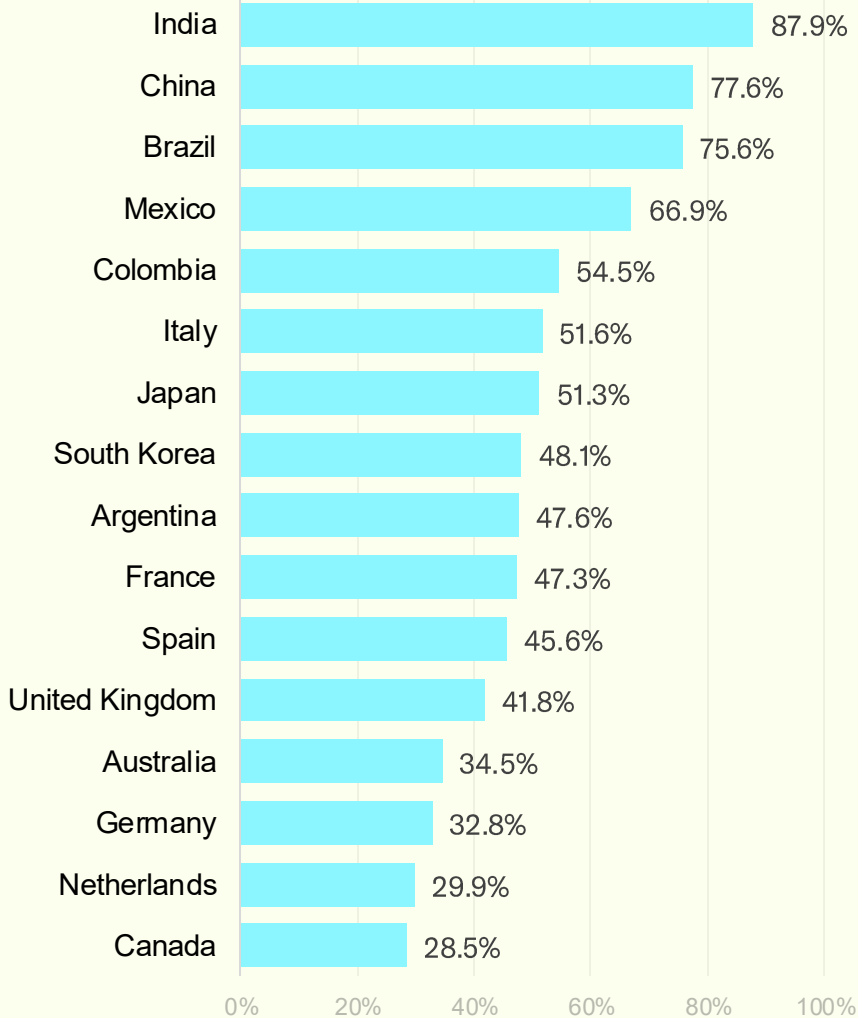
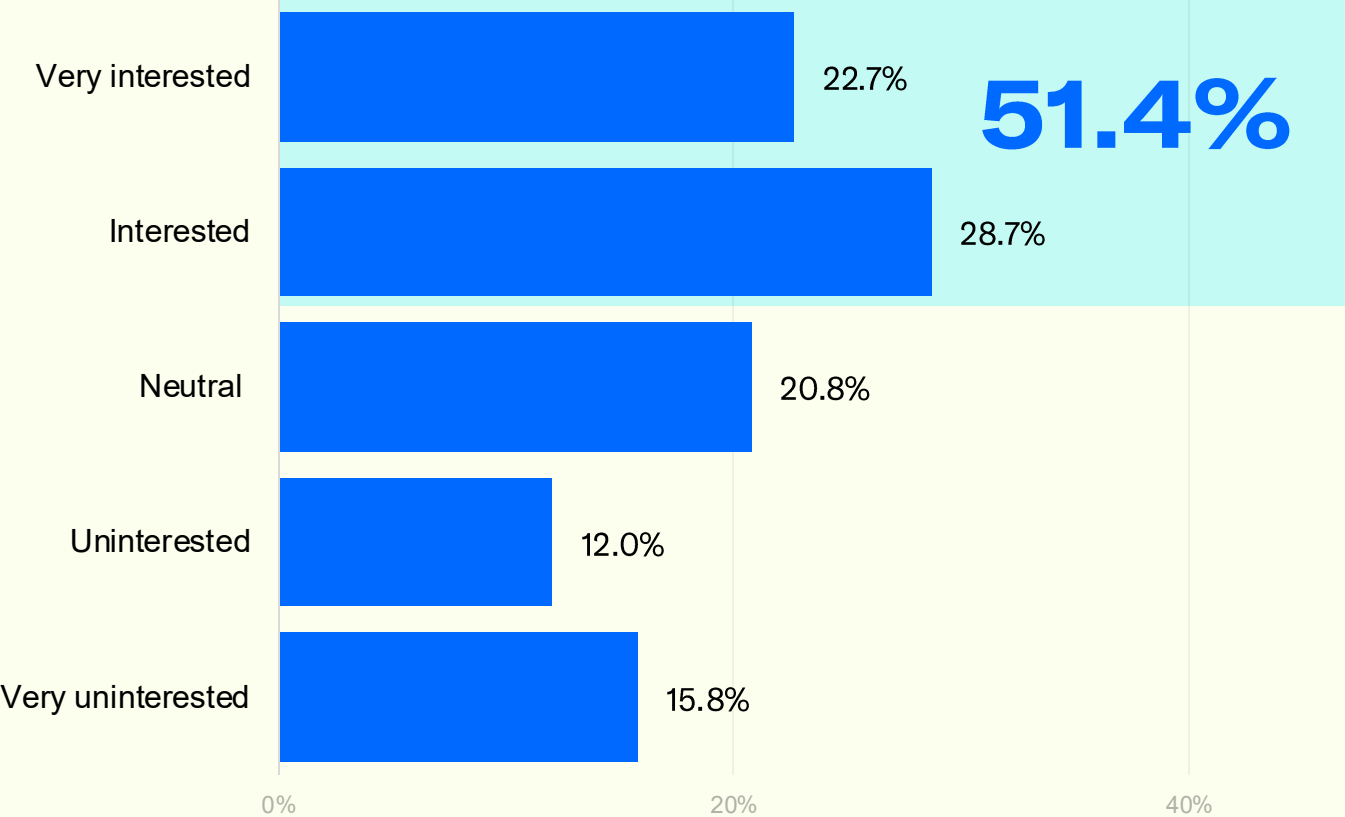
	# of Days in U.S.	# of Destinations	Days per Destination
Colombia	20.9	12.4	1.7
Argentina	17.7	5.7	3.1
Brazil	15.6	6.8	2.3
Mexico	15.3	15.1	1.0
India	15.3	8.6	1.8
Germany	13.6	6.7	2.0
Australia	13.2	5.1	2.6
Spain	12.5	4.4	2.8
Netherlands	12.4	5.8	2.2
United Kingdom	12.4	5.2	2.4
Italy	12.1	5.0	2.4
France	11.4	4.5	2.5
South Korea	8.4	3.4	2.5
China	8.3	3.3	2.6
Canada	8.3	3.3	2.5
Japan	8.0	4.9	1.6

2026 FIFA World Cup Hypothetical Trip –
Likely Travel Party Size



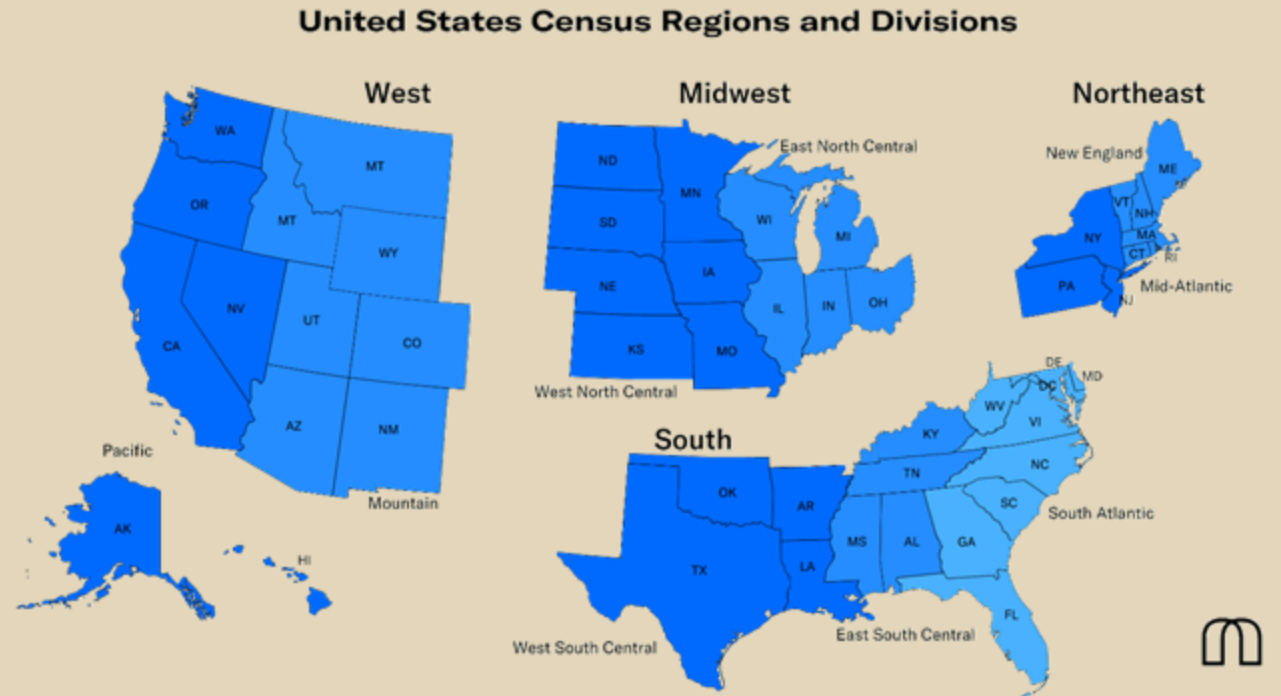
The Impact of the 2028 Olympic Games

Interest in Traveling to the U.S. 2028 Olympic Games
(Total Aggregate)



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.
- Surveys collected thru [April 2025](#)
- Confidence interval of +/- 1.55%
- Data is weighted to reflect the actual population of each region



Travel Sentiment



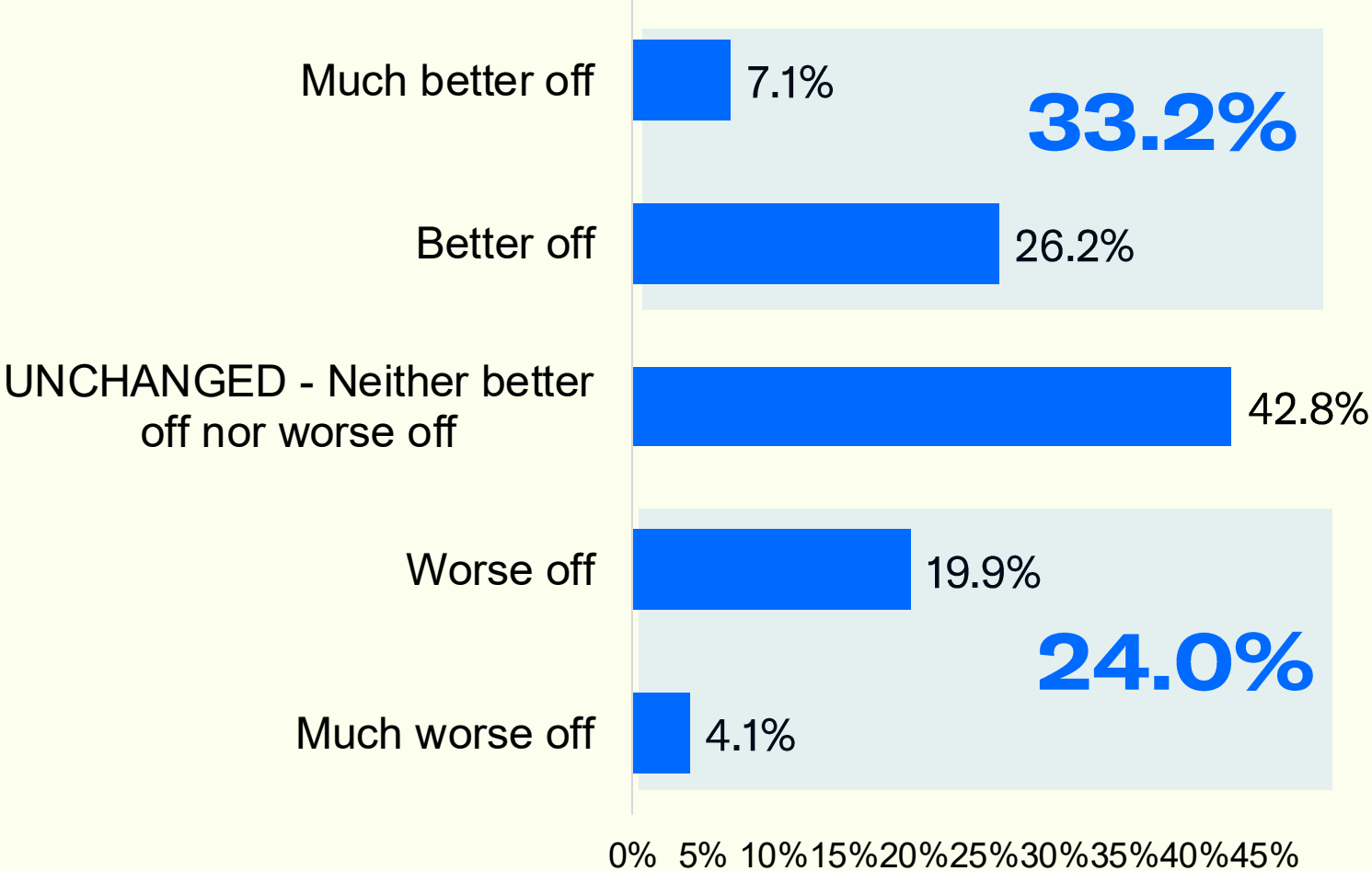
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Household Finances Show Continued Stability

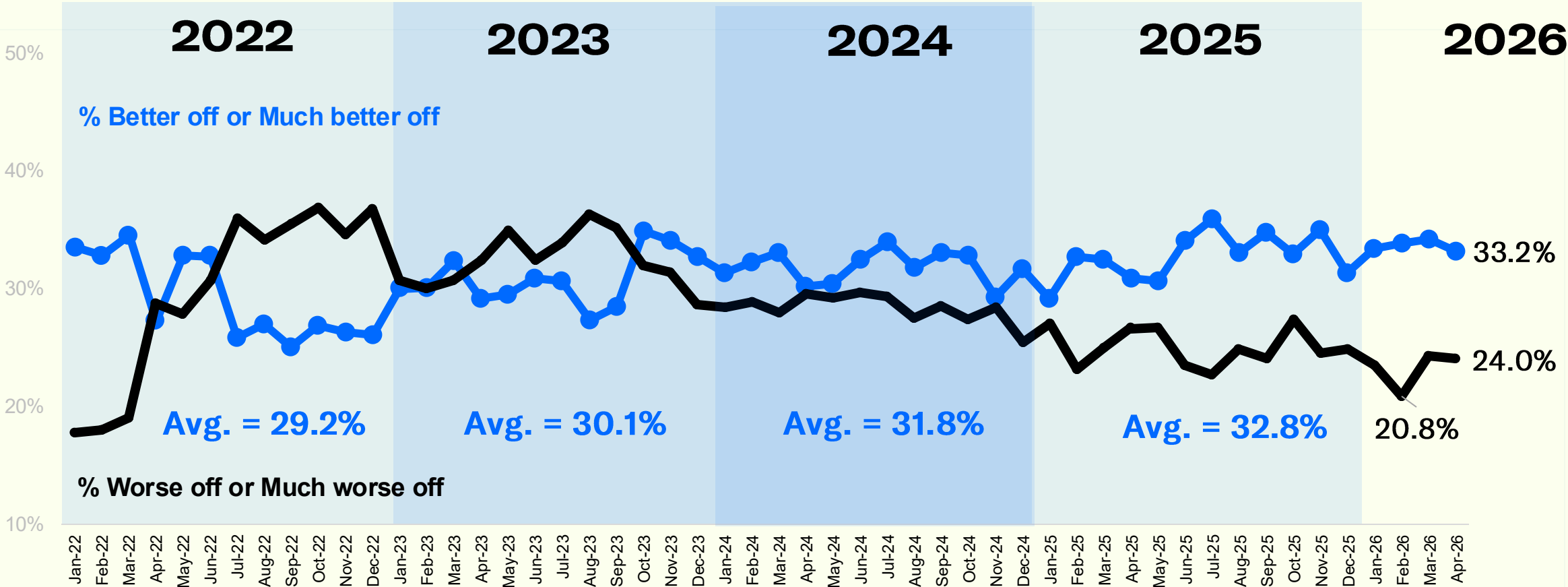
Question:

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



Household Finances Show Continued Stability

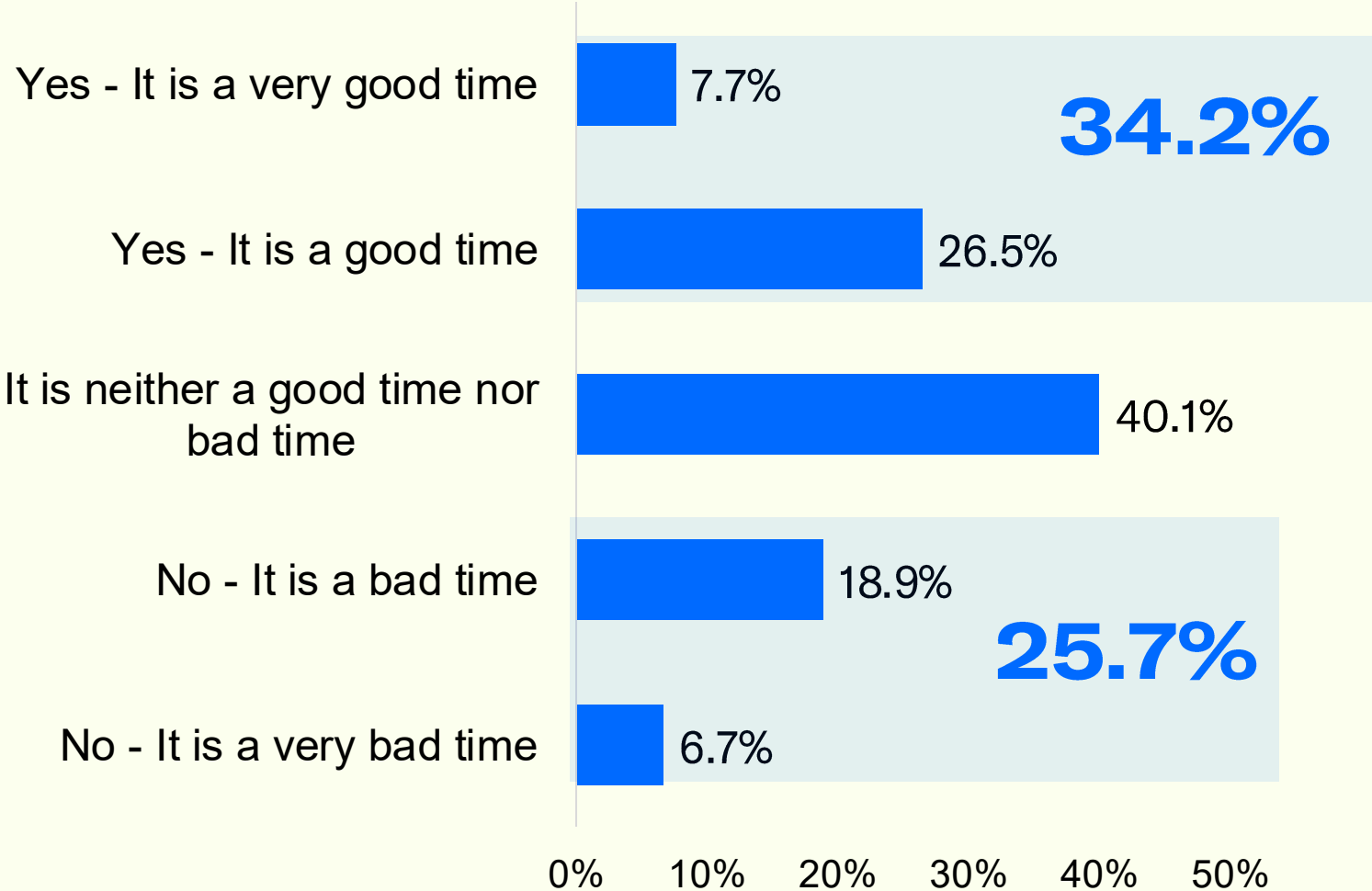
Question: Would you say that you (and your household) are better off or worse off financially than you were a year ago?



More Travelers See Now as a Good Time to Spend Than a Bad One

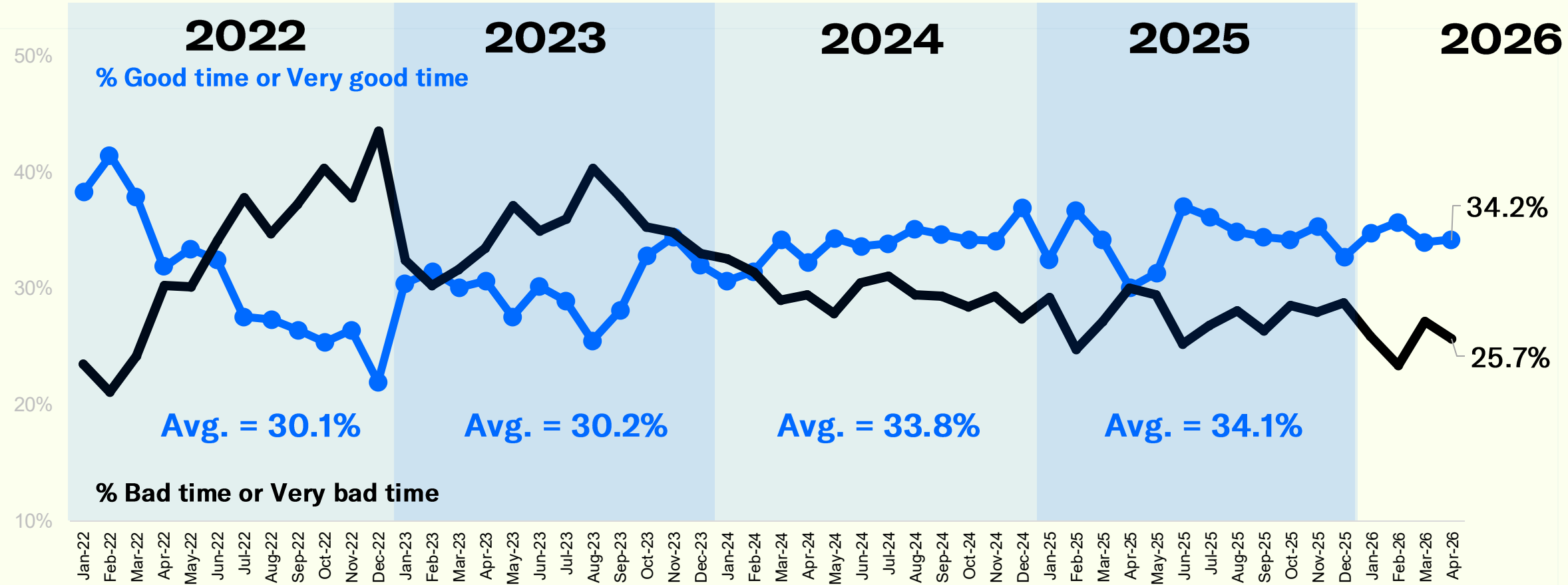
Question:

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?



More Travelers See Now as a Good Time to Spend Than a Bad One

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?



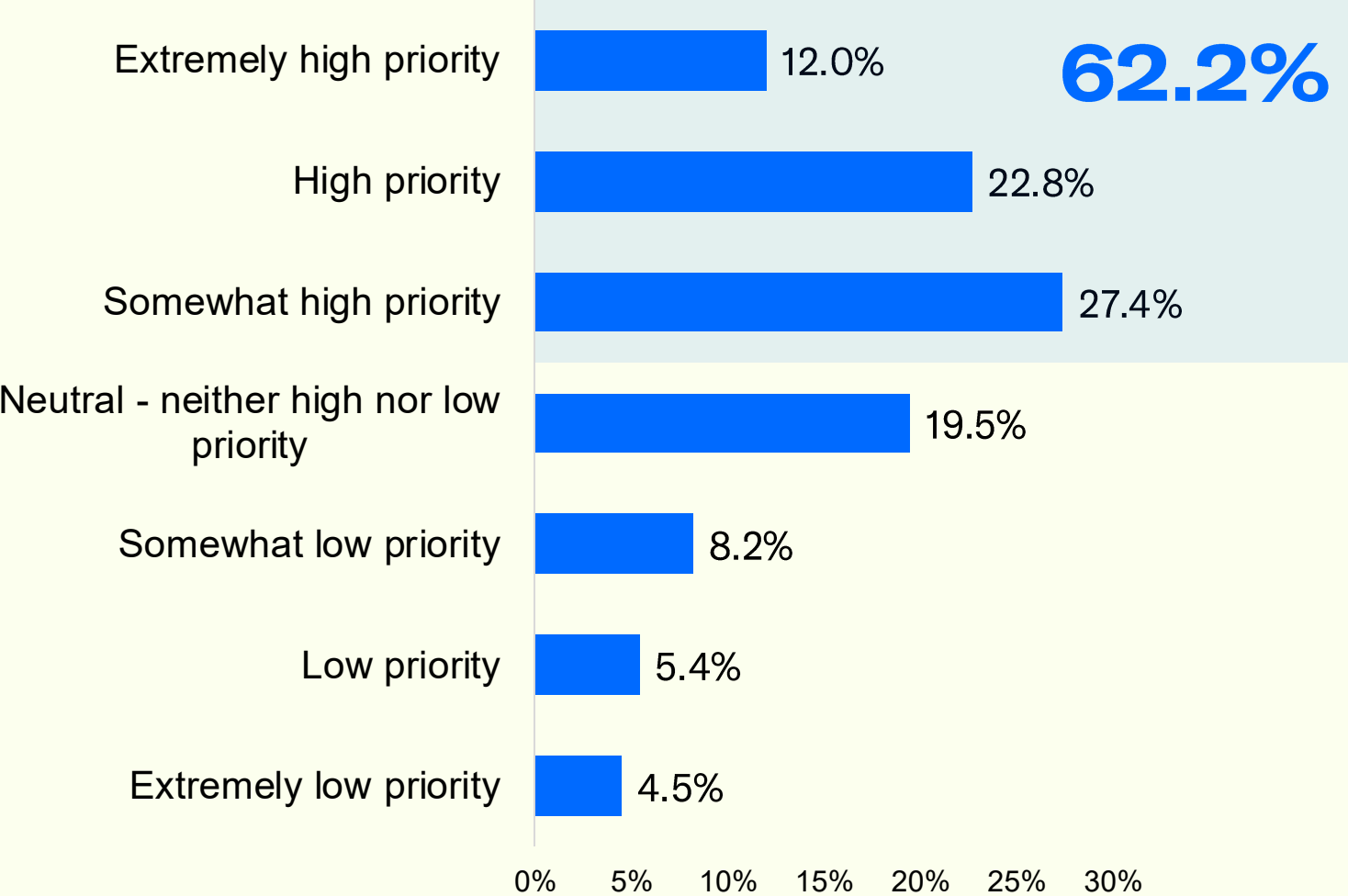
Travel Still Claims a Top Spot Among Consumer Spending Priorities

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.

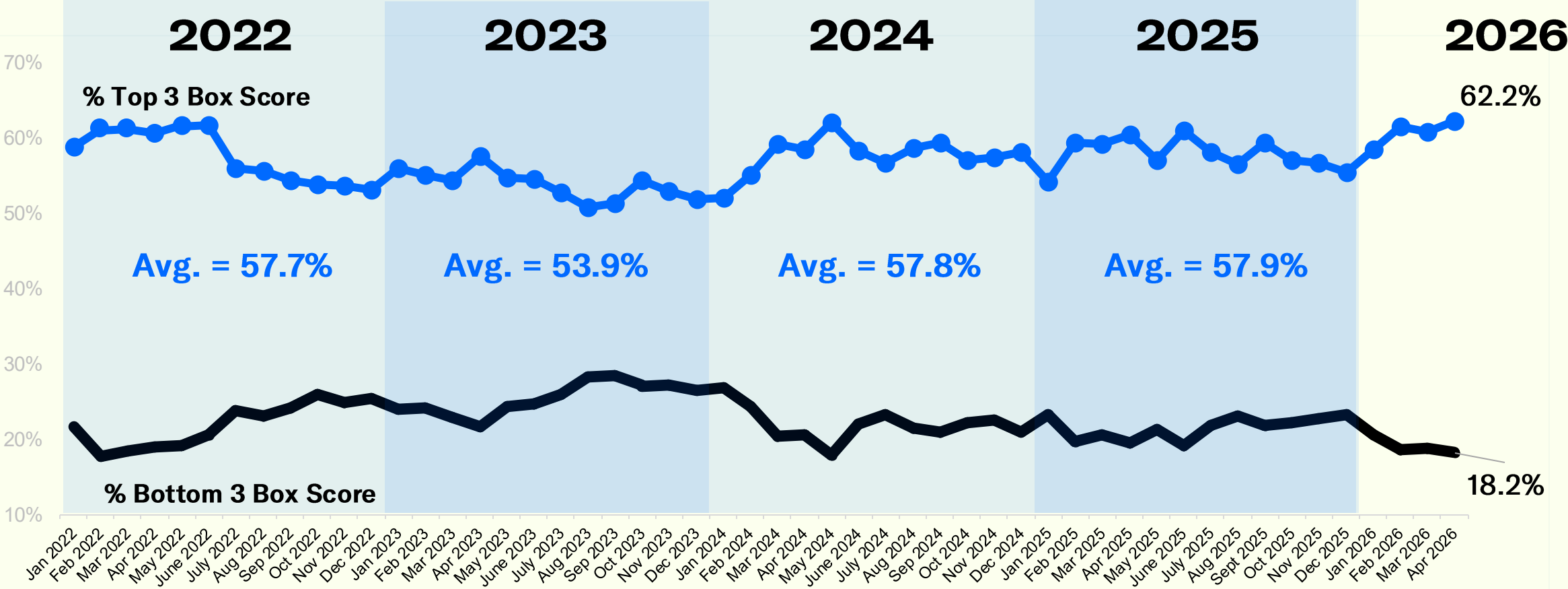
Leisure travel will be a(n)

_____.



Travel Still Claims a Top Spot Among Consumer Spending Priorities

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.



Looking Forward

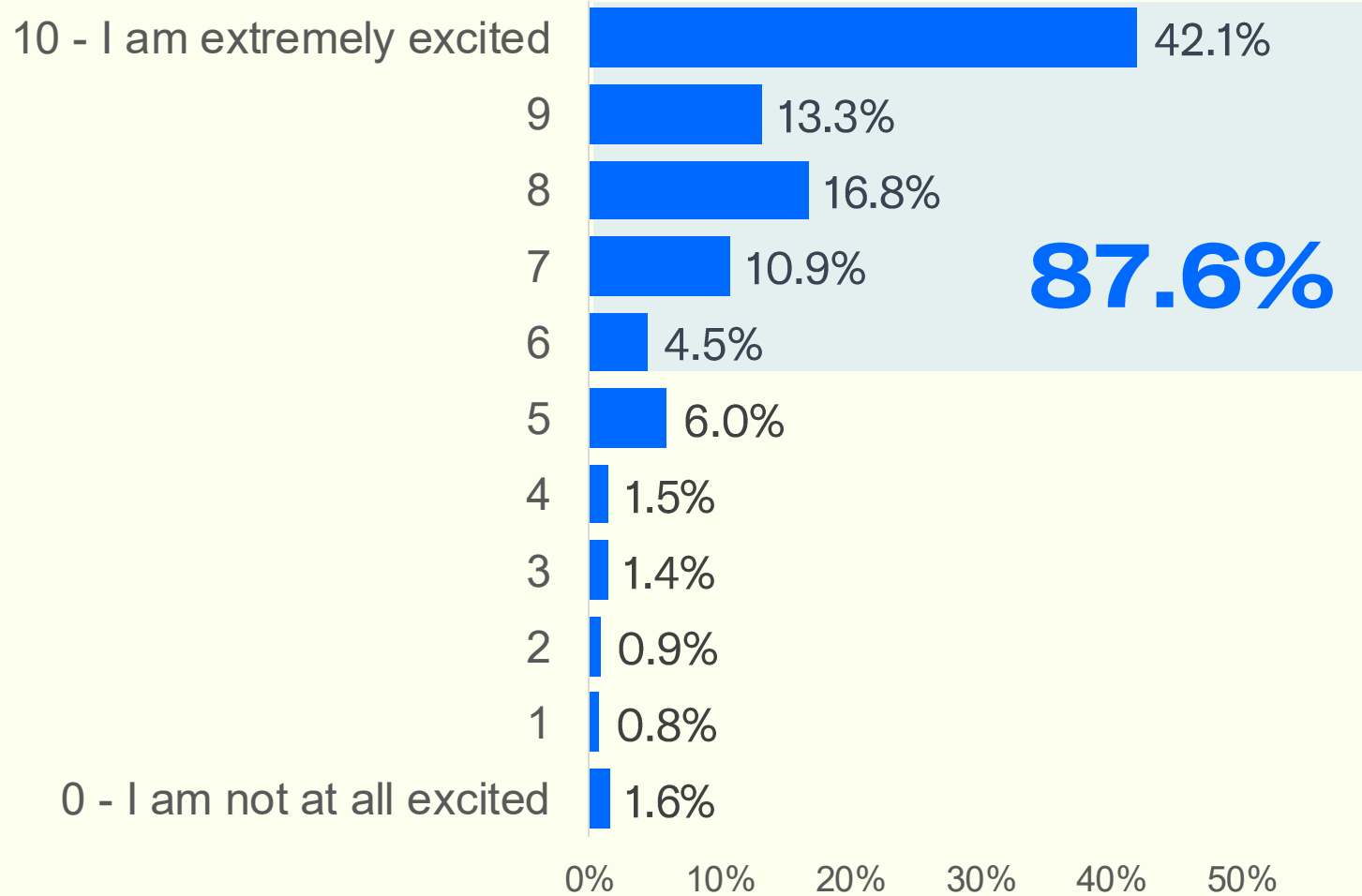
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Excitement for Leisure Travel Remains High

Question:

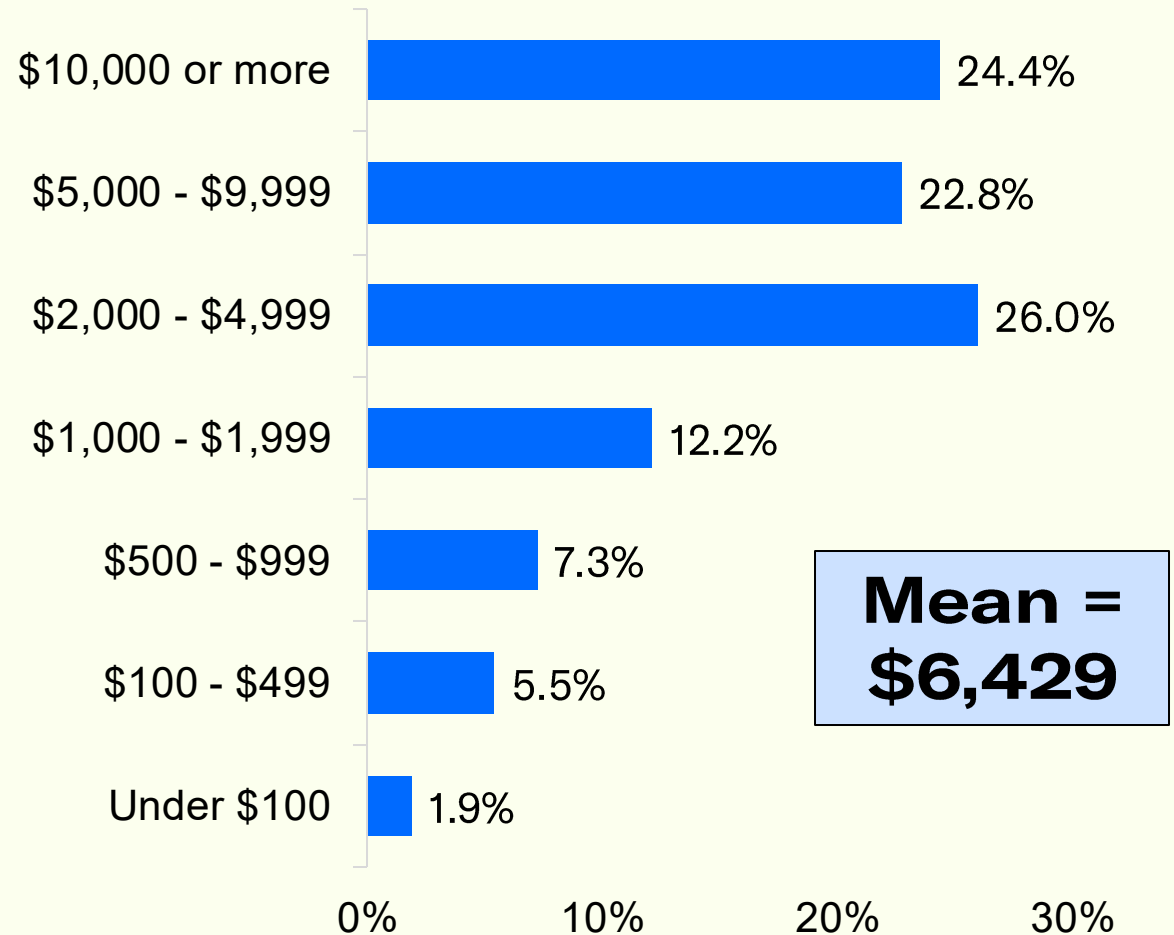
Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?



Americans Continue to Have High Expectations for Travel Spending

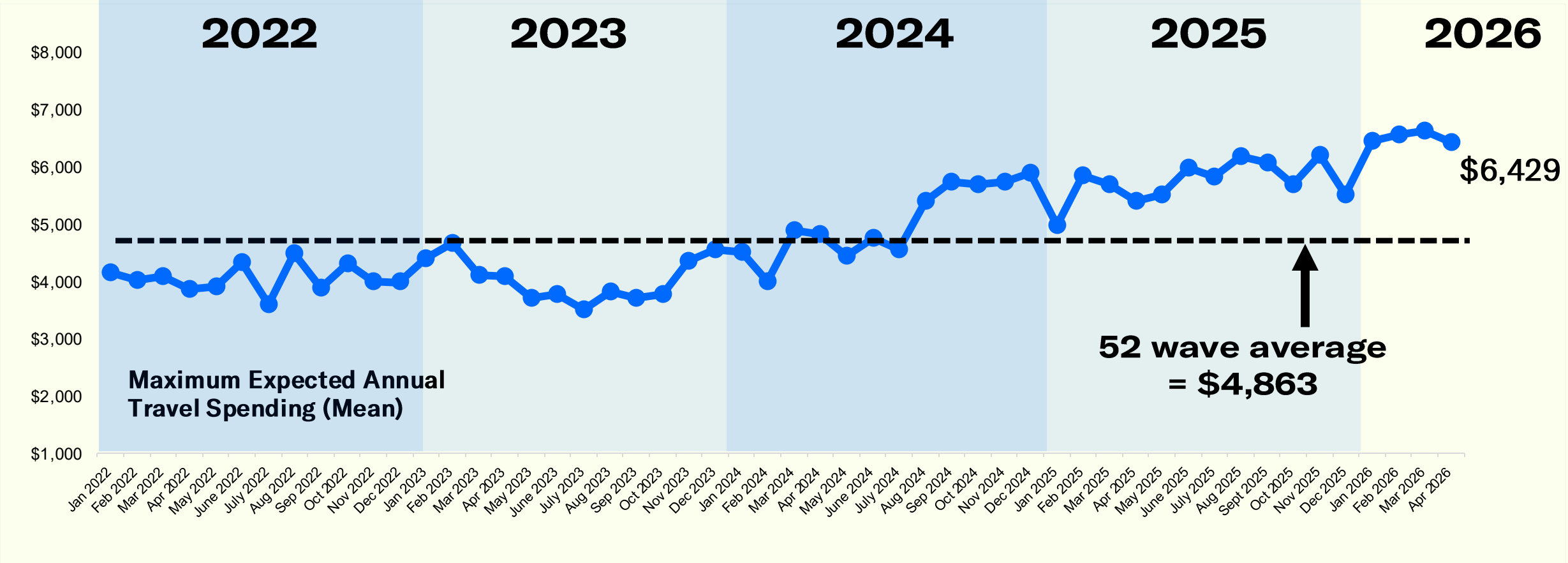
Question:

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?



Americans Continue to Have High Expectations for Travel Spending

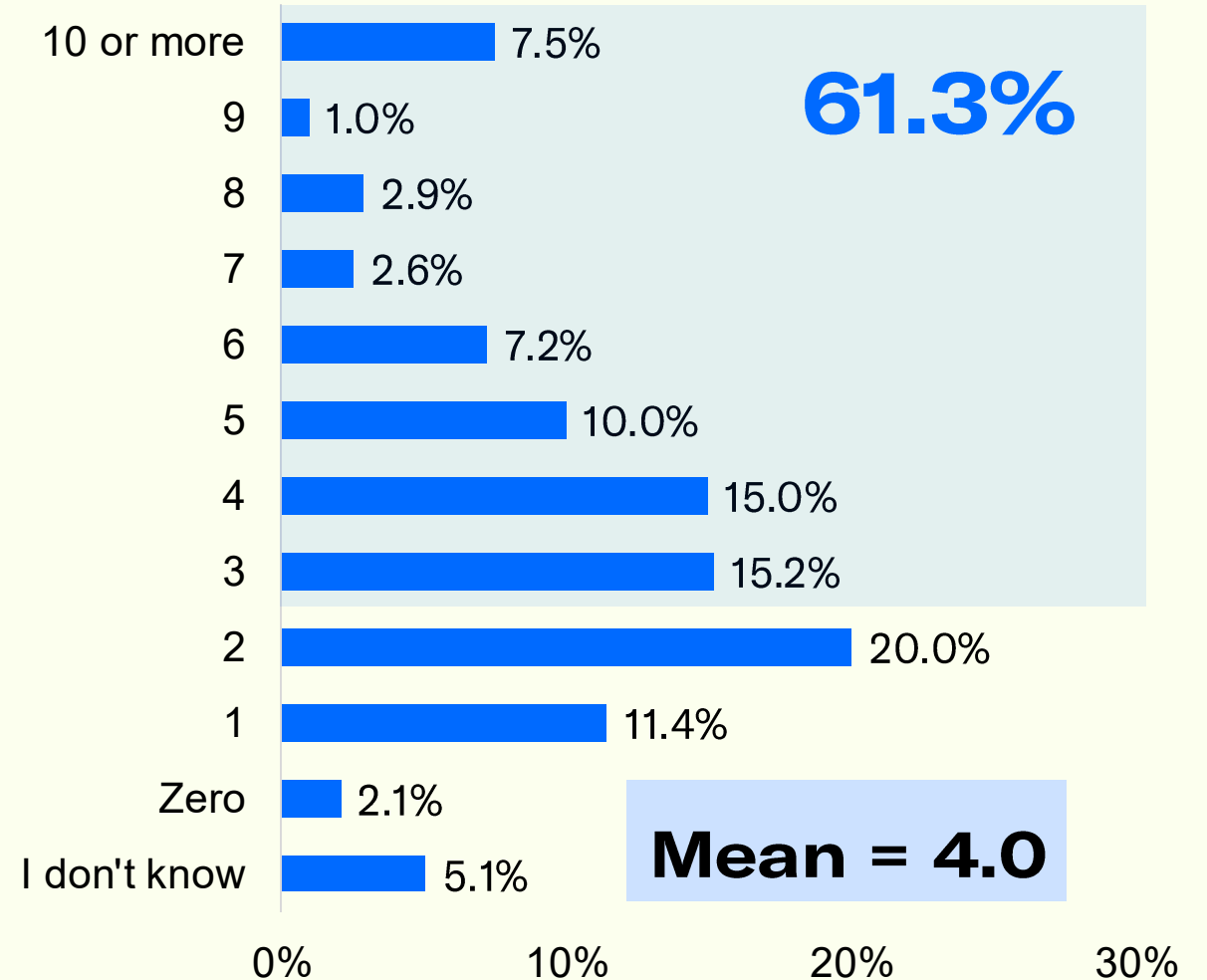
Question: How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS? Maximum I would spend on leisure travel (next 12 months):



The Year Ahead Looks Travel Filled, with Most Planning 3+ Trips

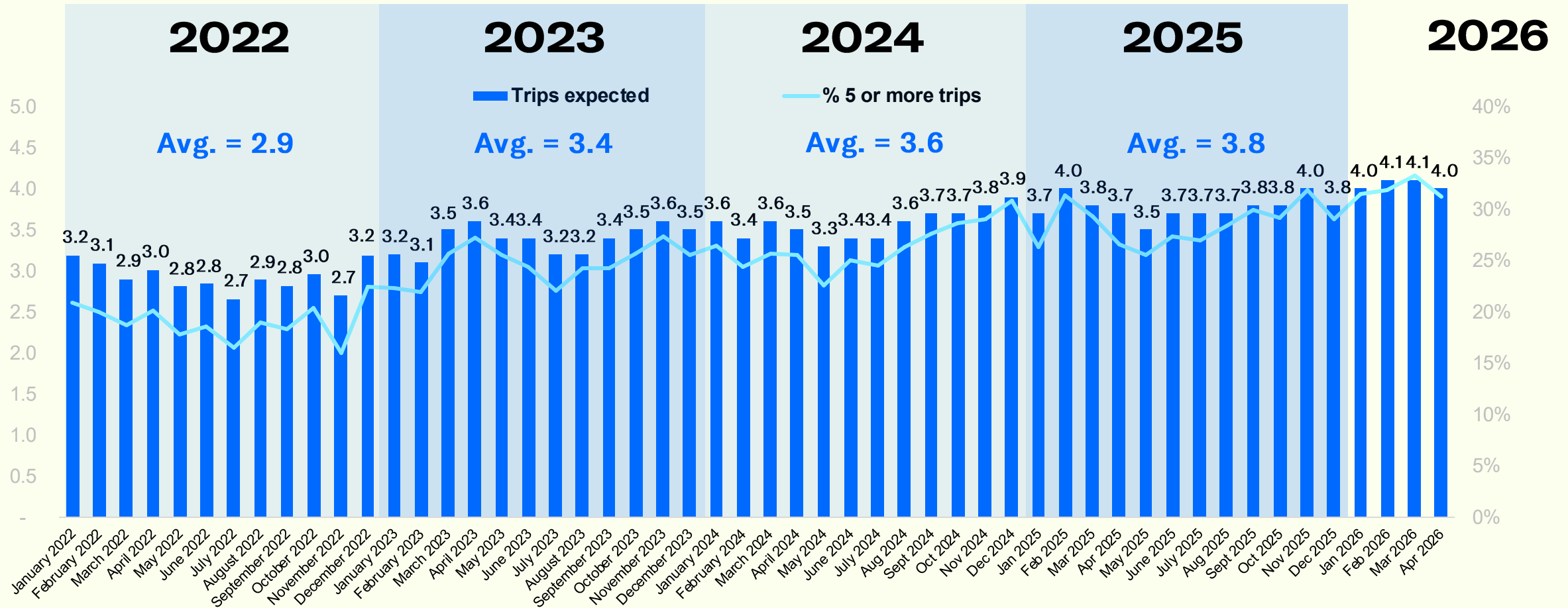
Question:

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



The Year Ahead Looks Travel Filled, with Most Planning 3+ Trips

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?



The Impact of a Barriers on Travel Sentiment



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Financial Barriers are Reshaping How Travelers Decide and Plan

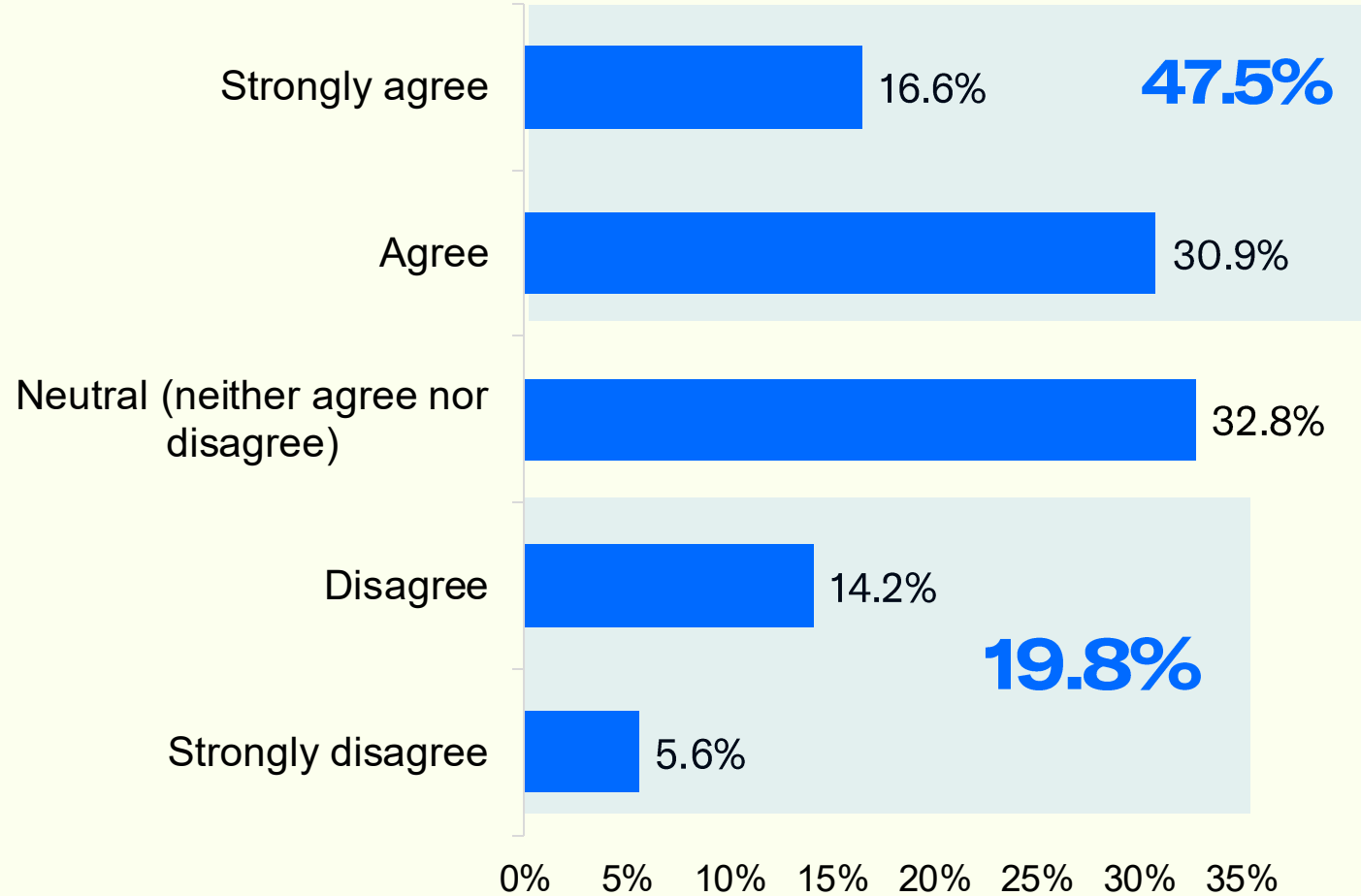
Question:

In the PAST SIX (6) MONTHS, which (if any) of the following have kept you from traveling more than you would have otherwise preferred? (Select all that apply)



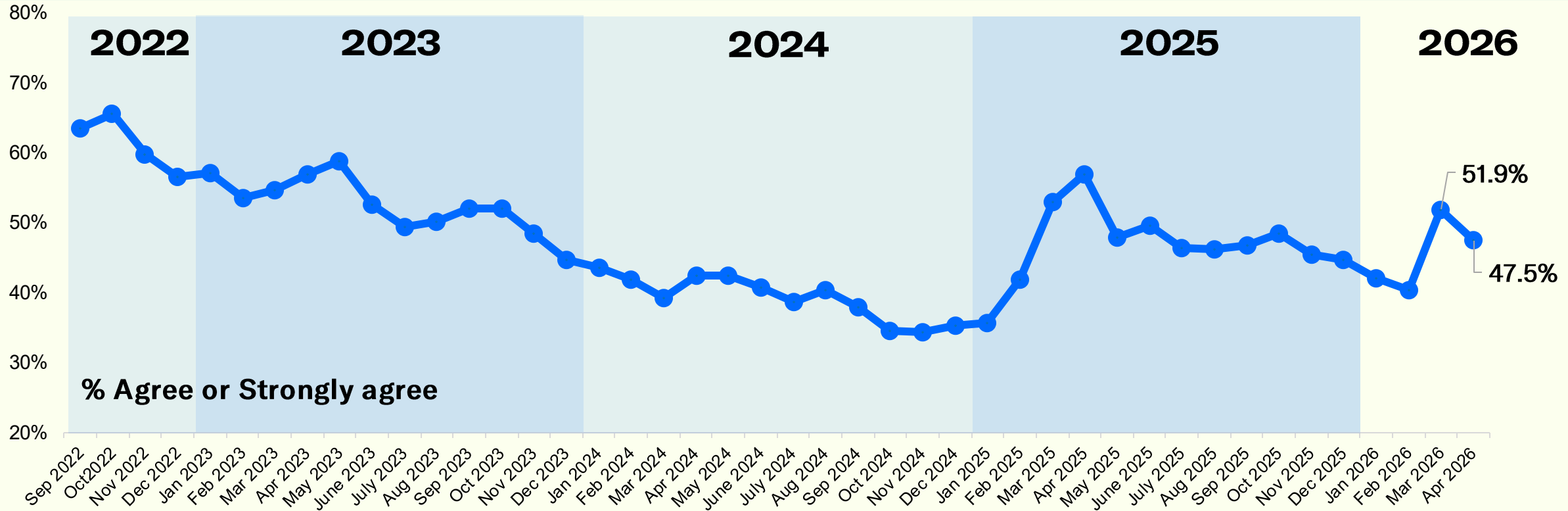
Recession Fears Stabilize

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



Recession Fears Stabilize

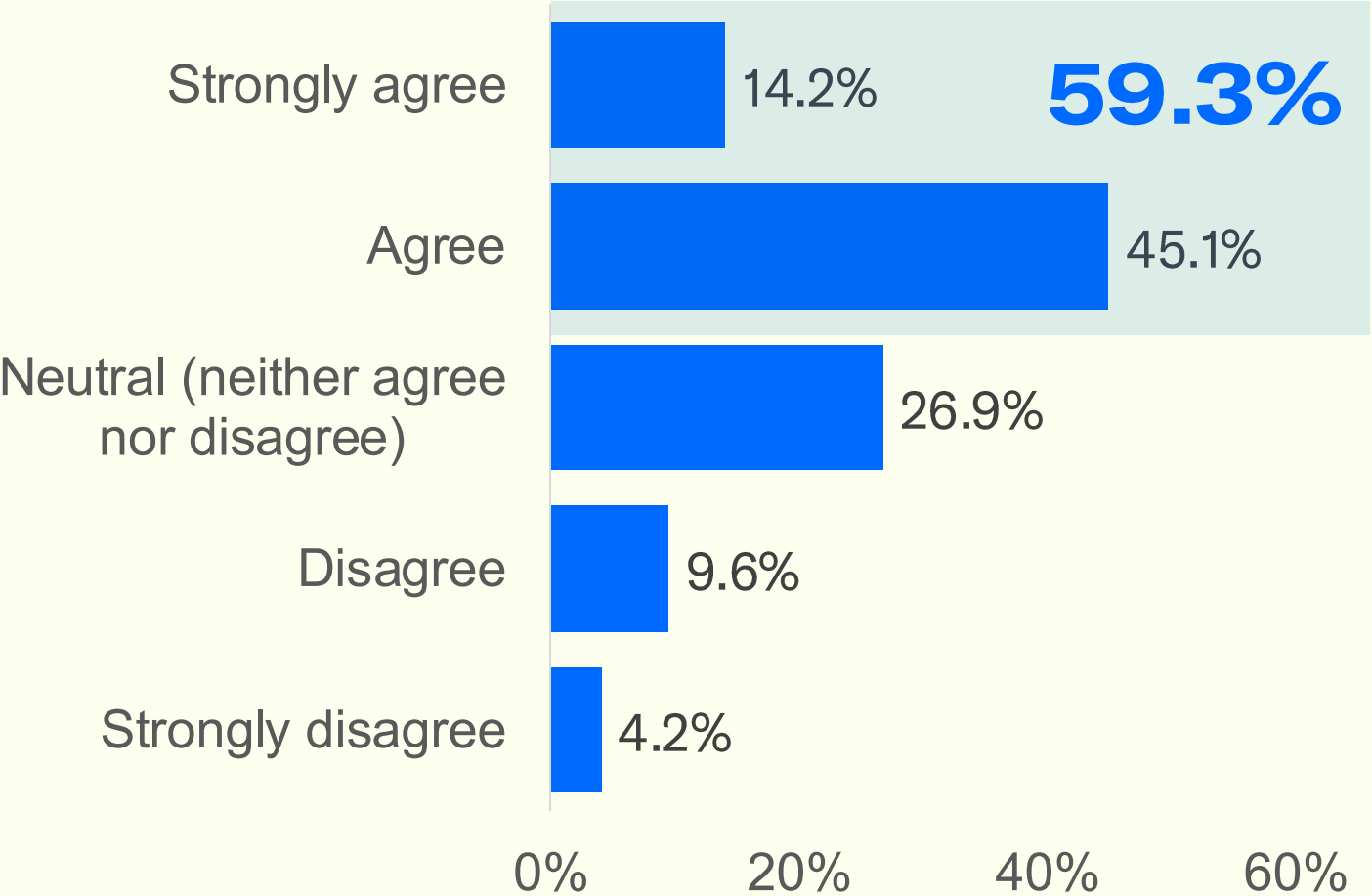
Statement Agreement: I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



Still Though, Most Americans Agree That Travel is a Worthwhile Investment

Question:

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



Texas Travelers





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Demographics

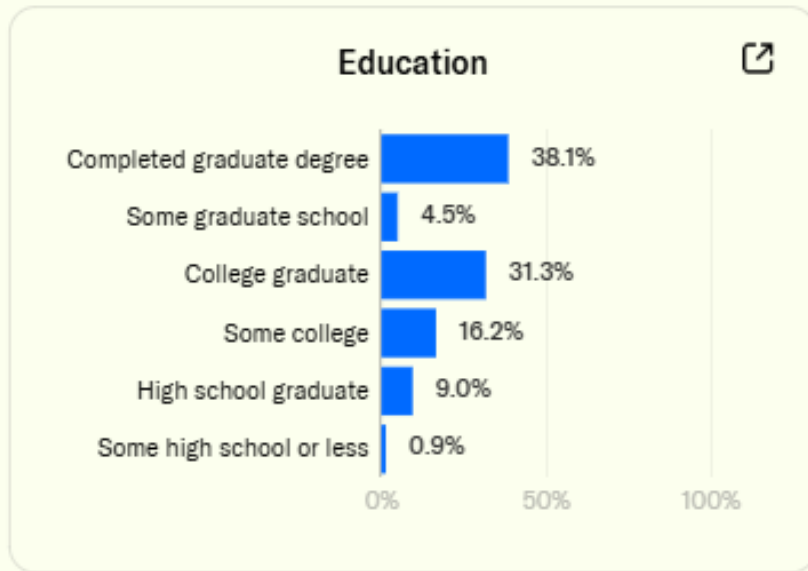
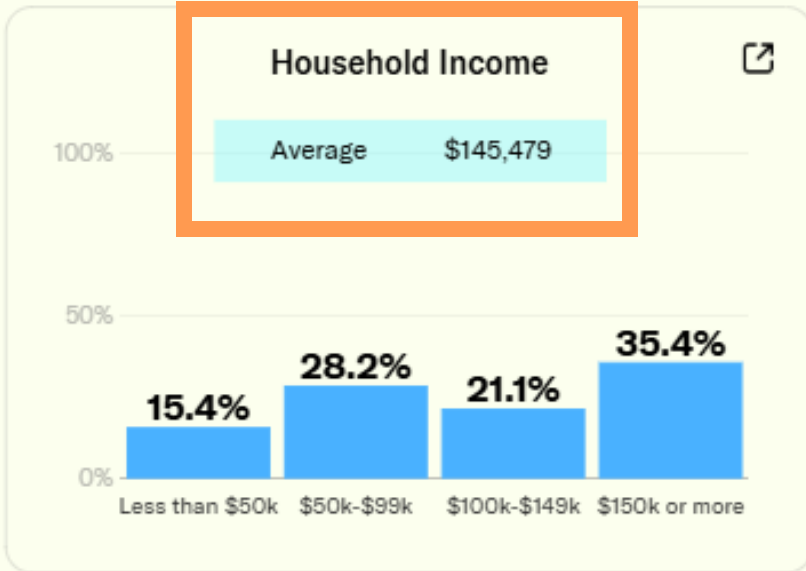
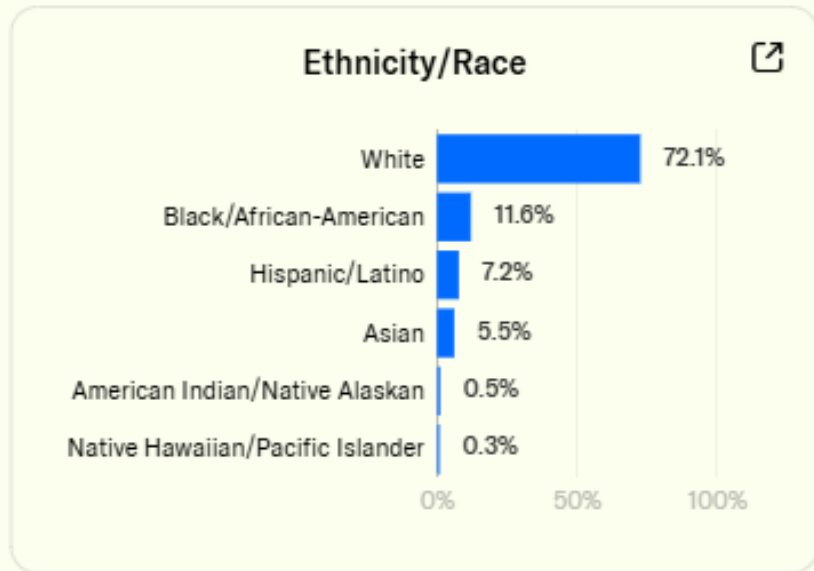
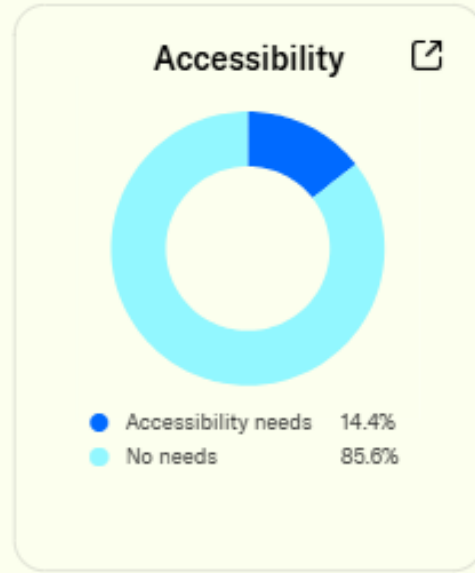
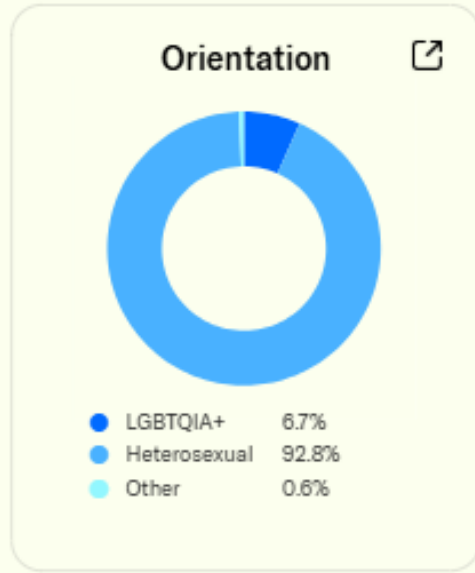
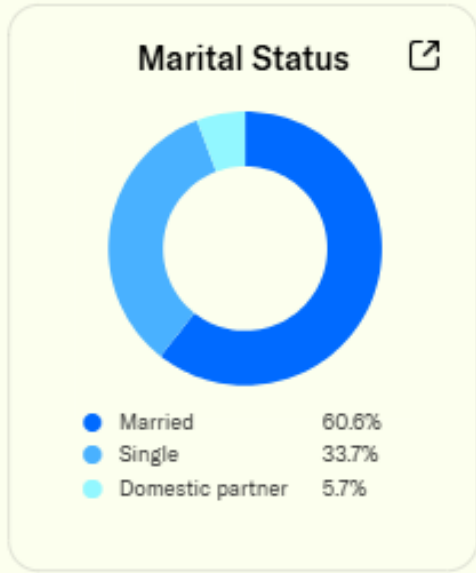
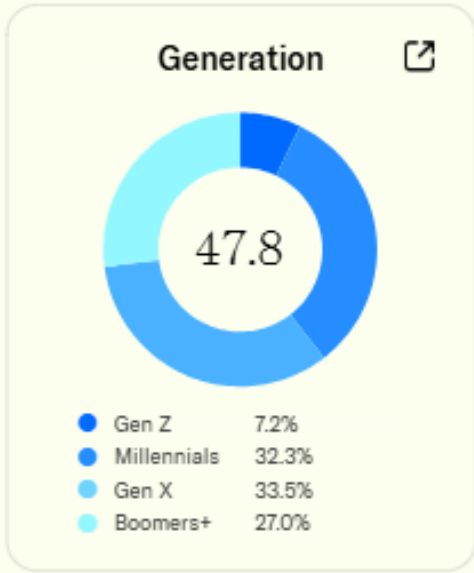
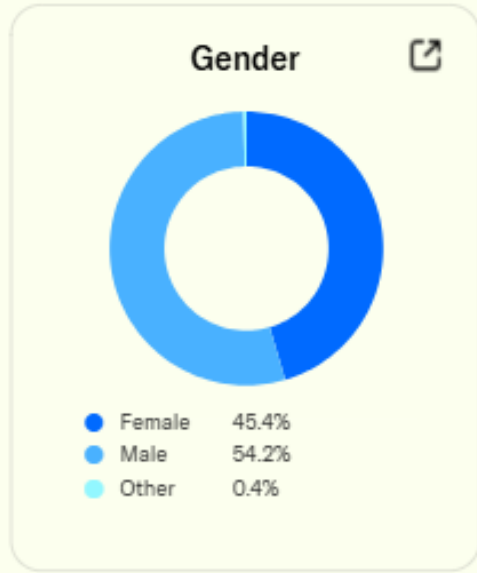
Recent Visitors to Texas (Past 12 Months)

Year
2026 YTD 

Curated Collections
States 

Filters
Texas 

(All)  Recent Visitors 

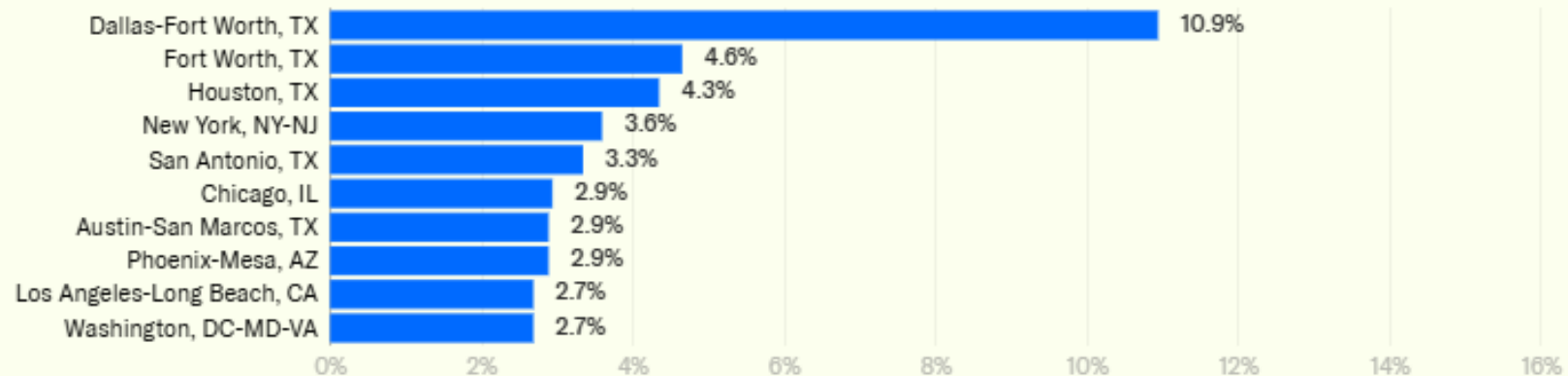


Origin Markets [↗](#)

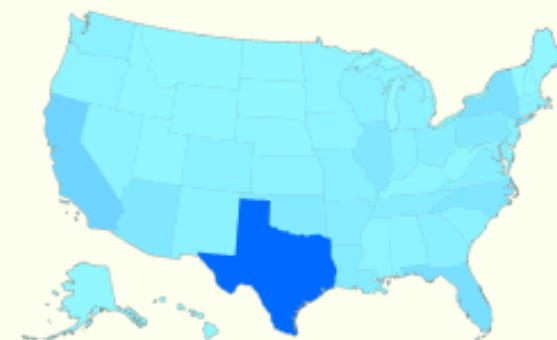
Recent Visitors to Texas (Past 12 Months)

Year: 2026 YTD
Curated Collections: States
Filters: Texas
(All) Recent Visitors

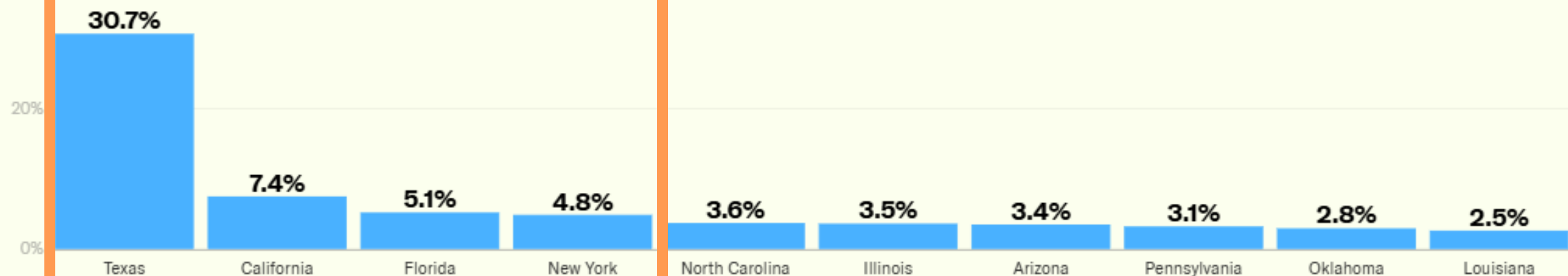
Top Origin Metros [↗](#)



Origin Map [↗](#)



Top Origin States [↗](#)



Travel Behaviors

Recent Visitors to Texas (Past 12 Months)

Year

2026 YTD

Curated Collections

States

Filters

Texas

(All)

Recent Visitors

Traveler Segments

(Past 12 Months)



Air Travelers *Traveled by Commercial Airline*

83.4%



Cruise Travelers *Traveled by Commercial Cruise Line*

22.5%



Sporting Event Travelers *Traveled for a Sports Event*

37.4%



Event & Festival Travelers *Attended a Festival or Special Event*

54.0%



Family Travelers *Parent That Travels with School-Aged Children*

34.3%

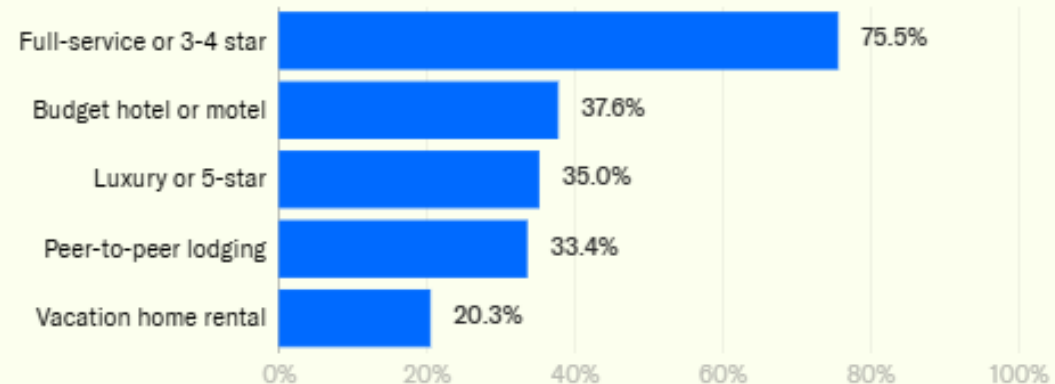
Trips Taken in the Past Two Years

(Average per Trip Type)



Paid Accommodations

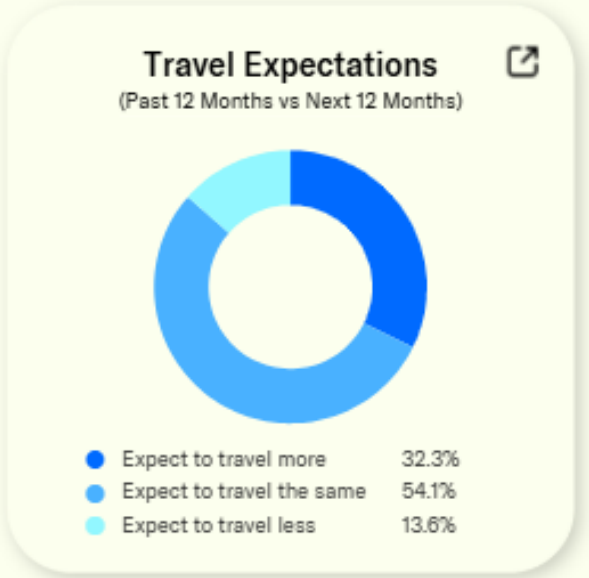
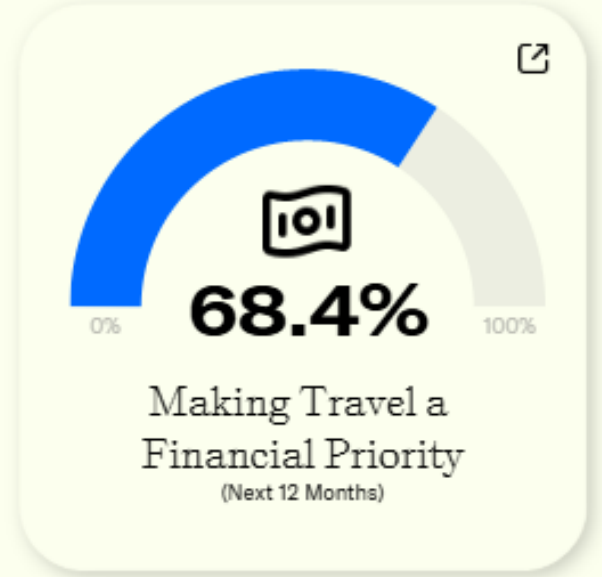
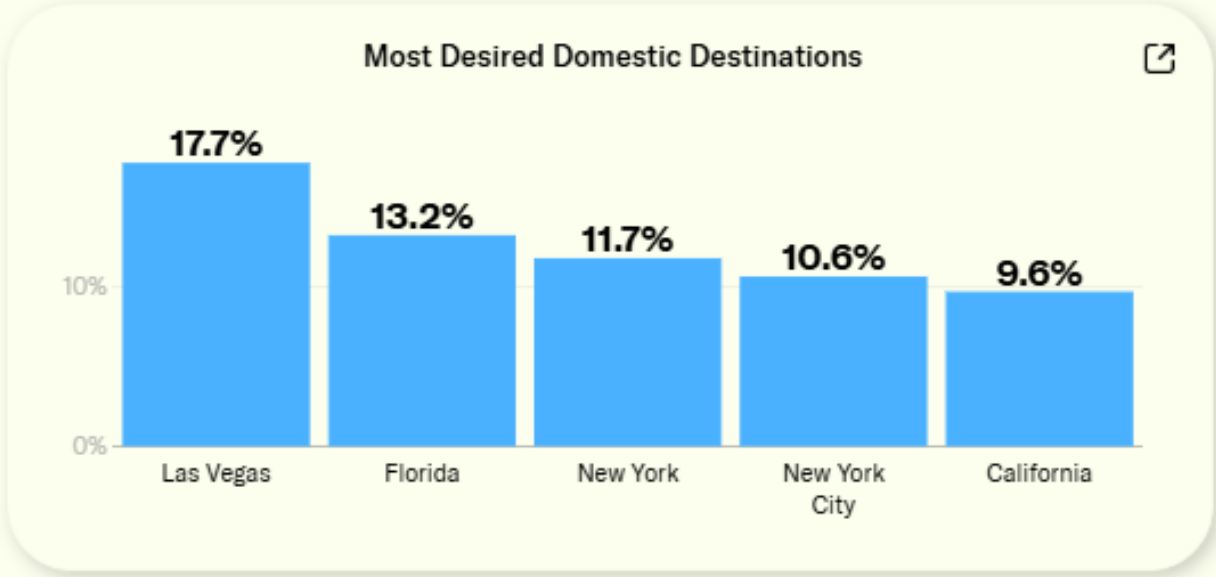
(Overnight Stay in the Past Two Years)



Travel Sentiment [🔗](#)

Recent Visitors to Texas (Past 12 Months)

Year: 2026 YTD
Curated Collections: States
Filters: Texas
(All) Recent Visitors



Travel Inspiration Resources

Recent Visitors to Texas (Past 12 Months)

Curated Collections

States

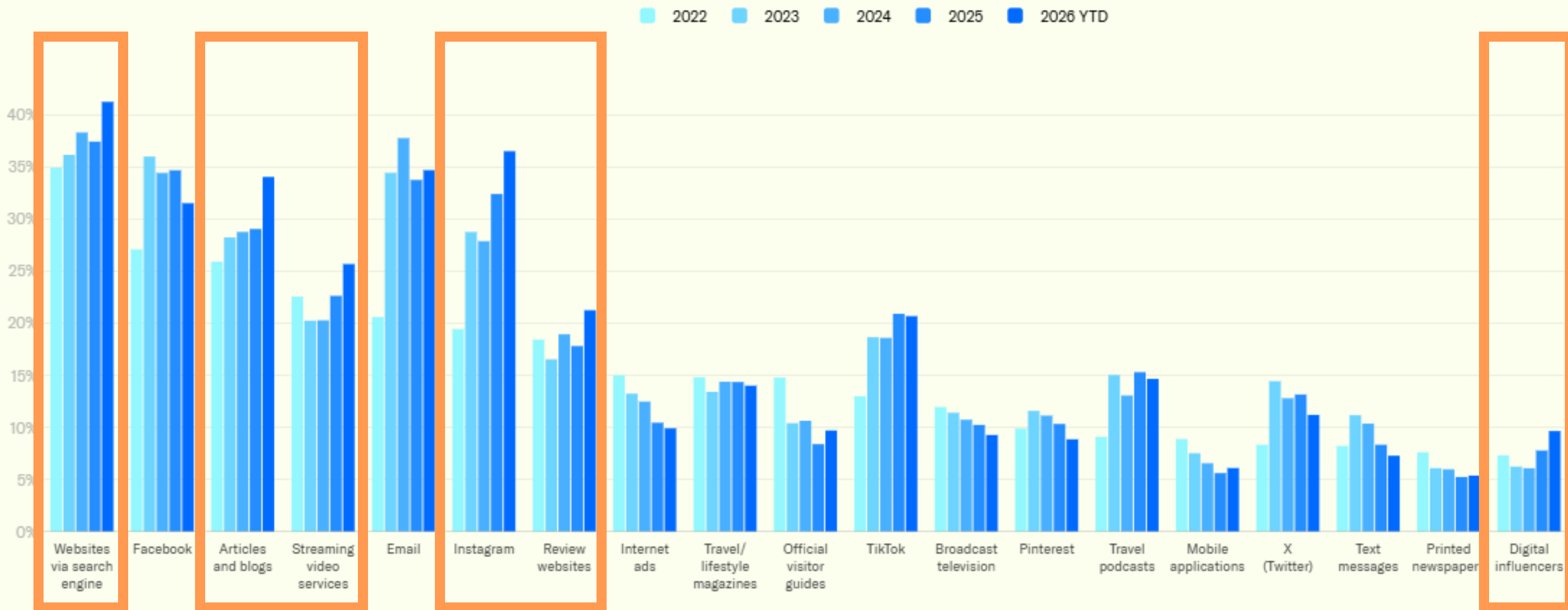
Filters

Texas

(All)

Recent Visitors

Most Effective Travel Inspiration Resources by Year



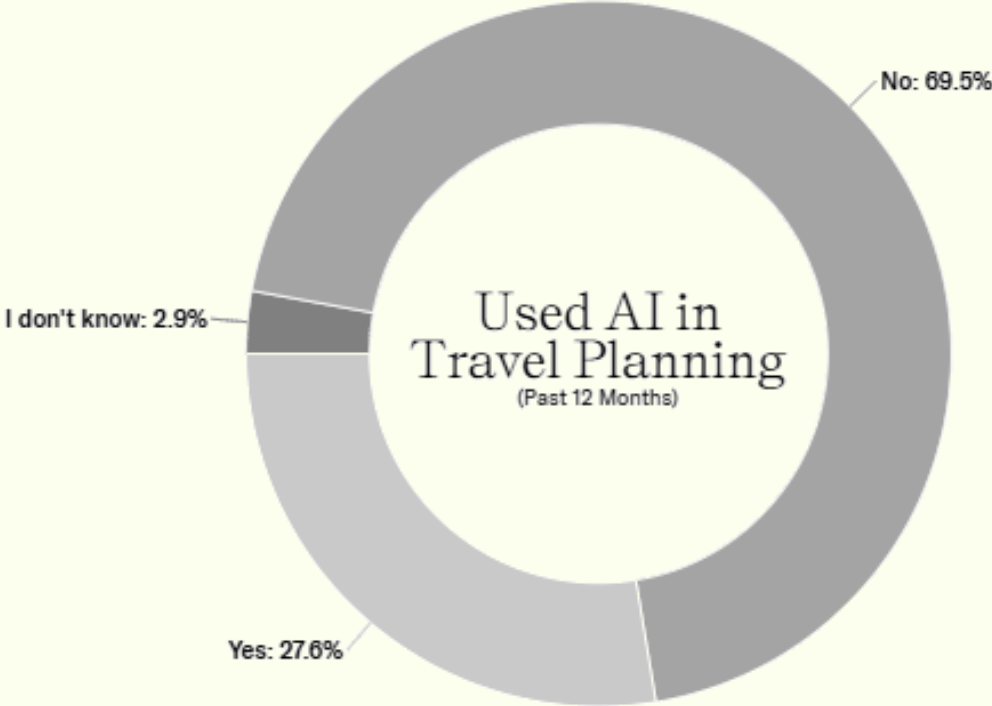
Question: Please think about how travel destinations could best reach you with their messages right now. Where would you generally be MOST RECEPTIVE to learning about new destinations to visit? (Please select all that apply)

Artificial Intelligence in Travel Planning

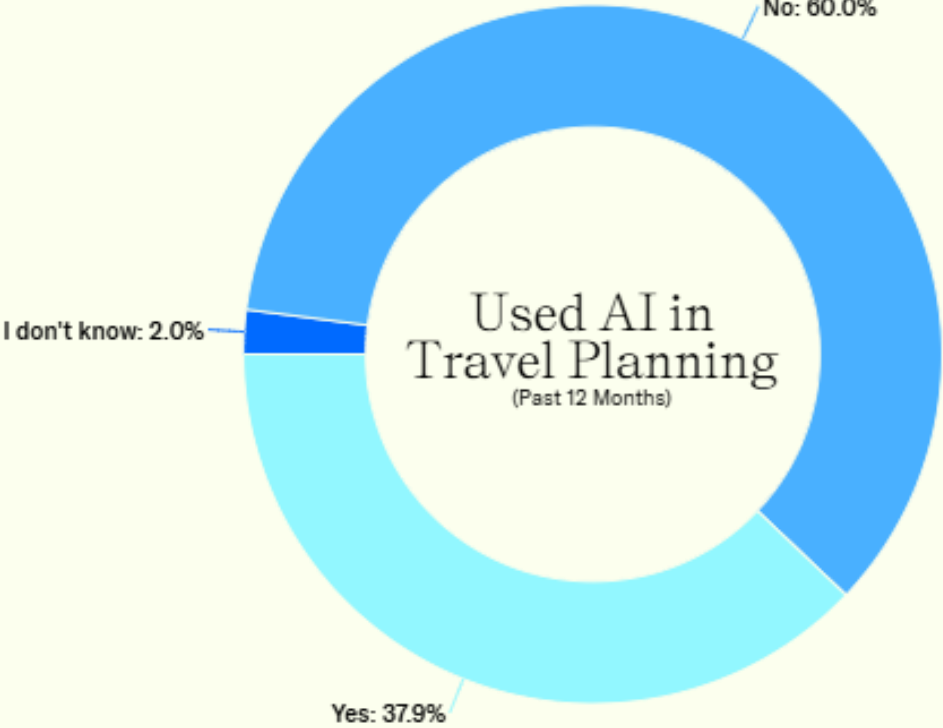
Recent Visitors to Texas (Past 12 Months)

Year: 2026 YTD | Curated Collections: States | Filters: Texas | (All) | Recent Visitors

Average American Traveler



Texas Traveler



Question: In the past 12 months, have you used any Artificial Intelligence (AI) tools specifically to help you plan (or prepare for) your trips?

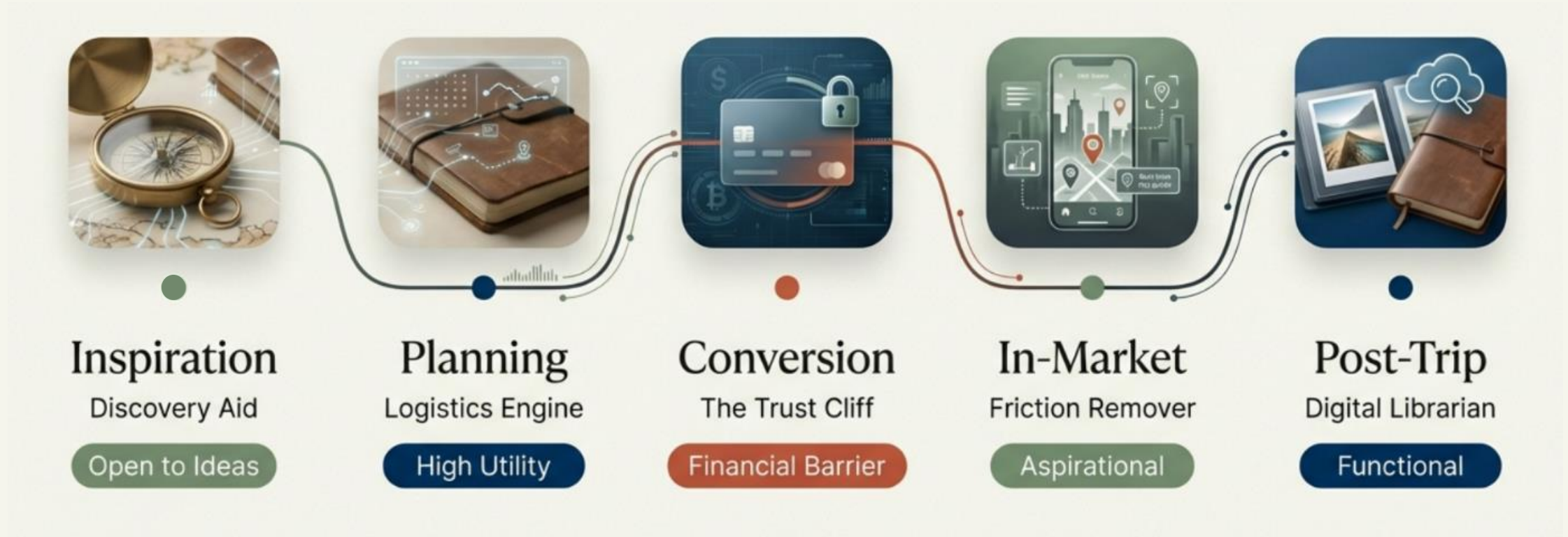
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AI & The Traveler Journey

Navigating Trust, Utility and Openness from Inspiration to Post-Trip

Traveler Mindsets Shift Dramatically Throughout the Planning Process



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Inspiration: Open to Destination ideas

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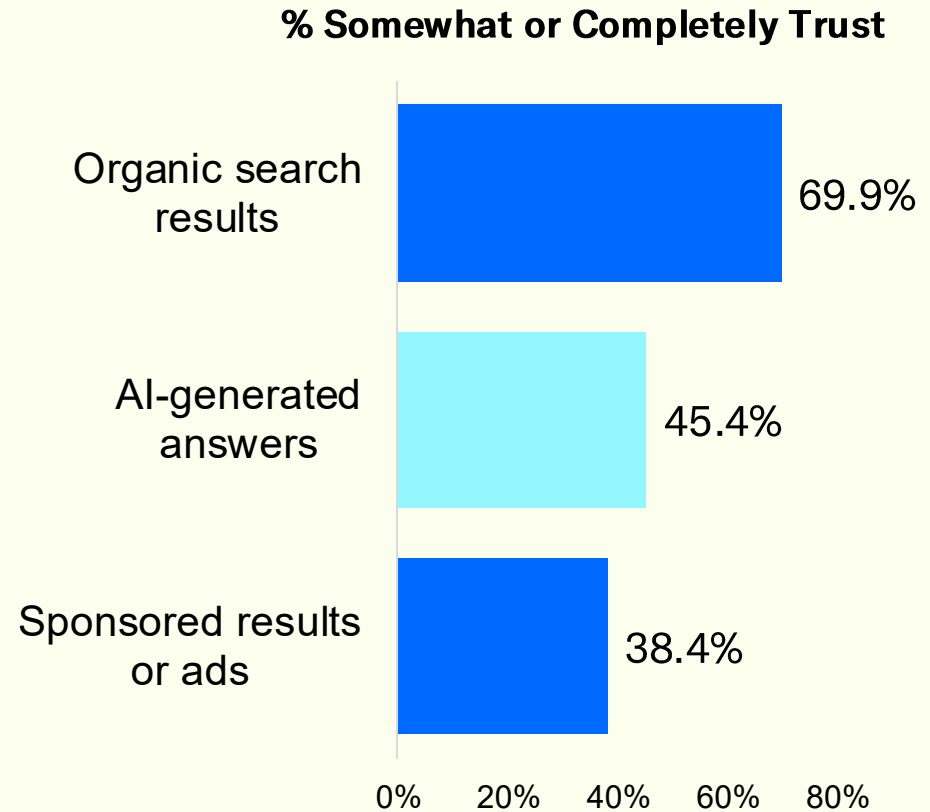
Travel Research Centers Around Search, OTAs, and Reviews

Question: In the PAST TWELVE (12) MONTHS, which of the following sources have you used WHEN LOOKING FOR TRAVEL INFORMATION online? (Select all that apply)

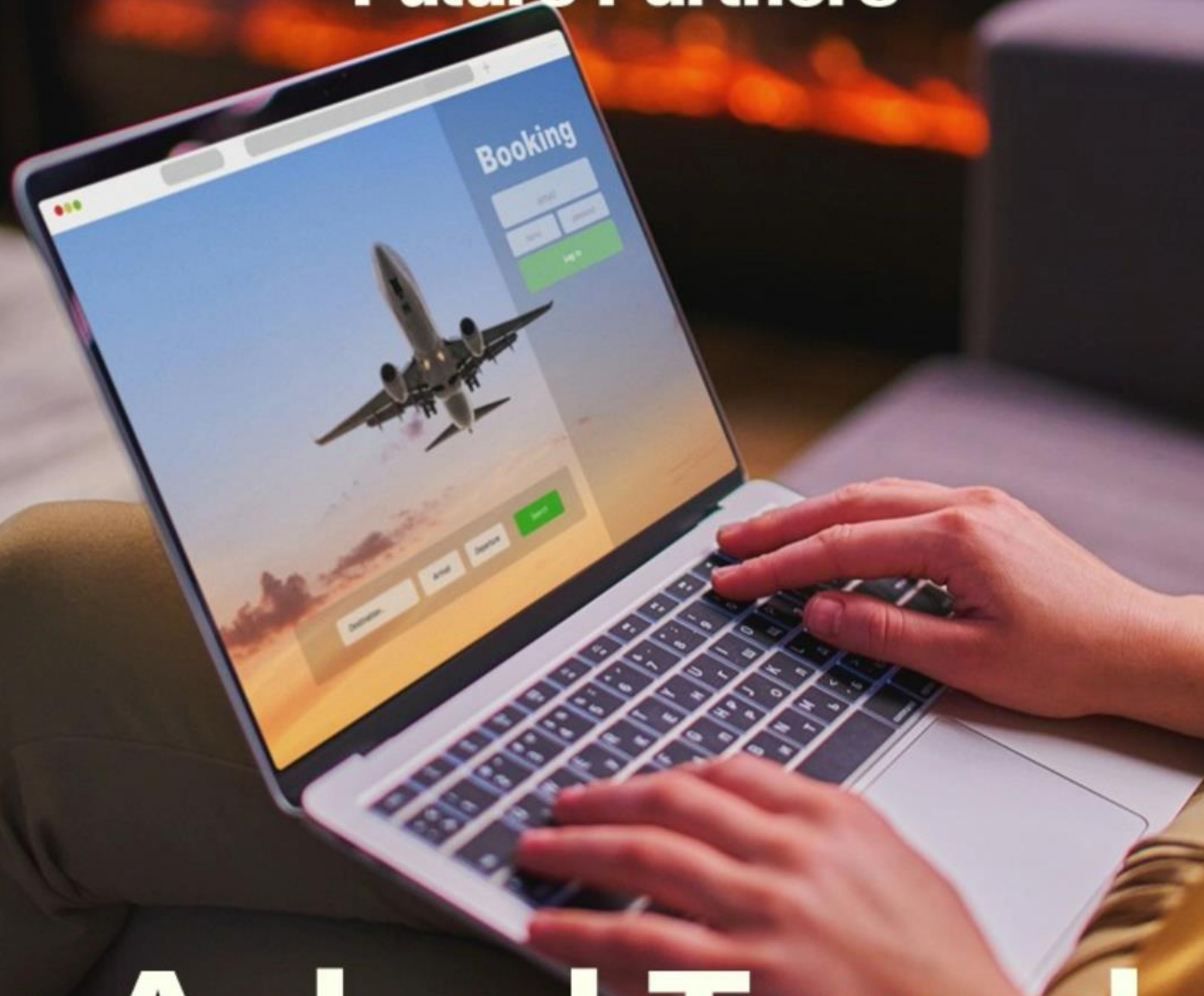


Travelers Trust Organic Results More Than AI Answers or Sponsored Ads

Question: How much do you TRUST each of the following types of search results when looking for travel information online? (Select one for each)



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We Asked Travelers...

Inspiration: AI assisted Discovery More than AI Decision-Making

Travelers are increasingly comfortable letting AI suggest where to go, but they rarely book solely on those suggestions.

Open to Suggestions

53.6%

Discovery Assistance:

Found Places they wouldn't have otherwise

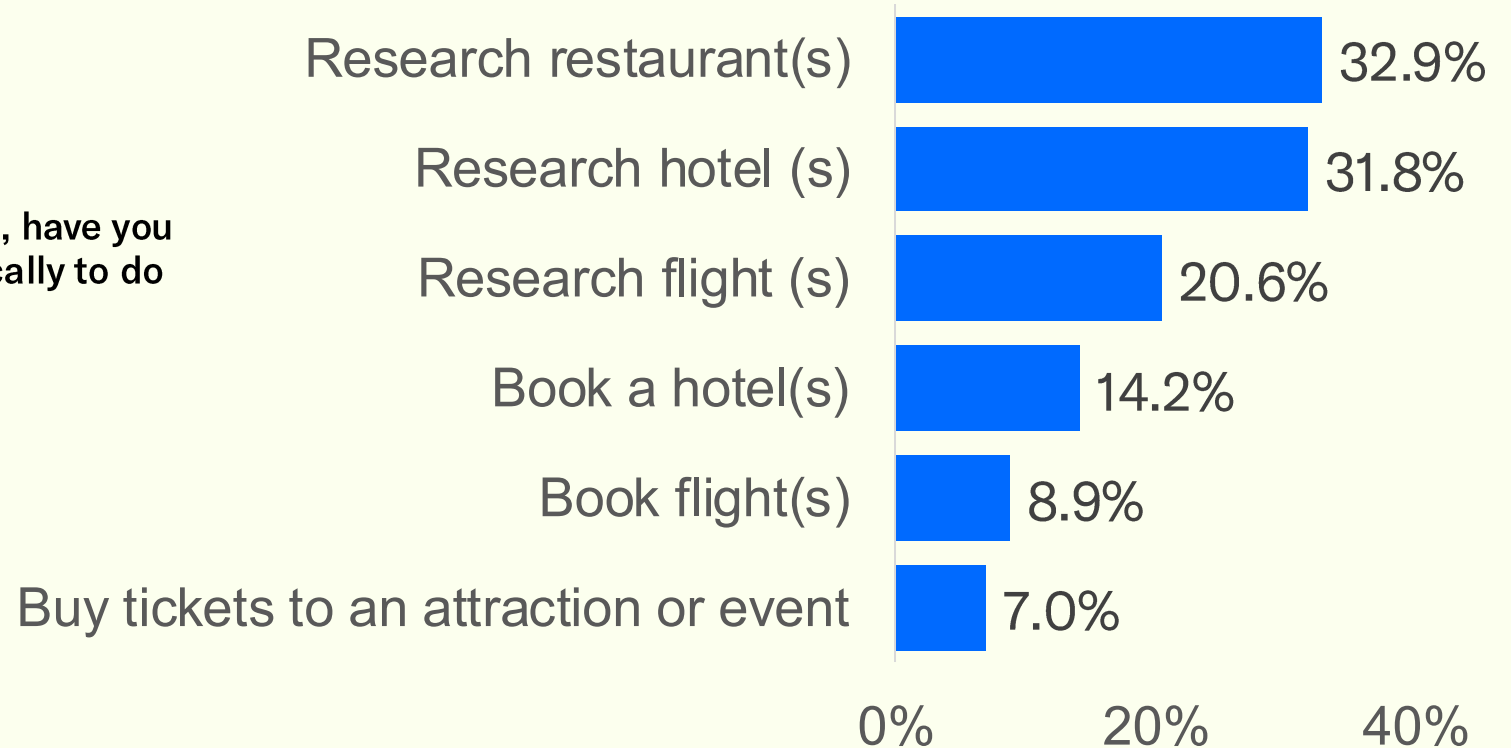
34.3%

Primary Decision Maker

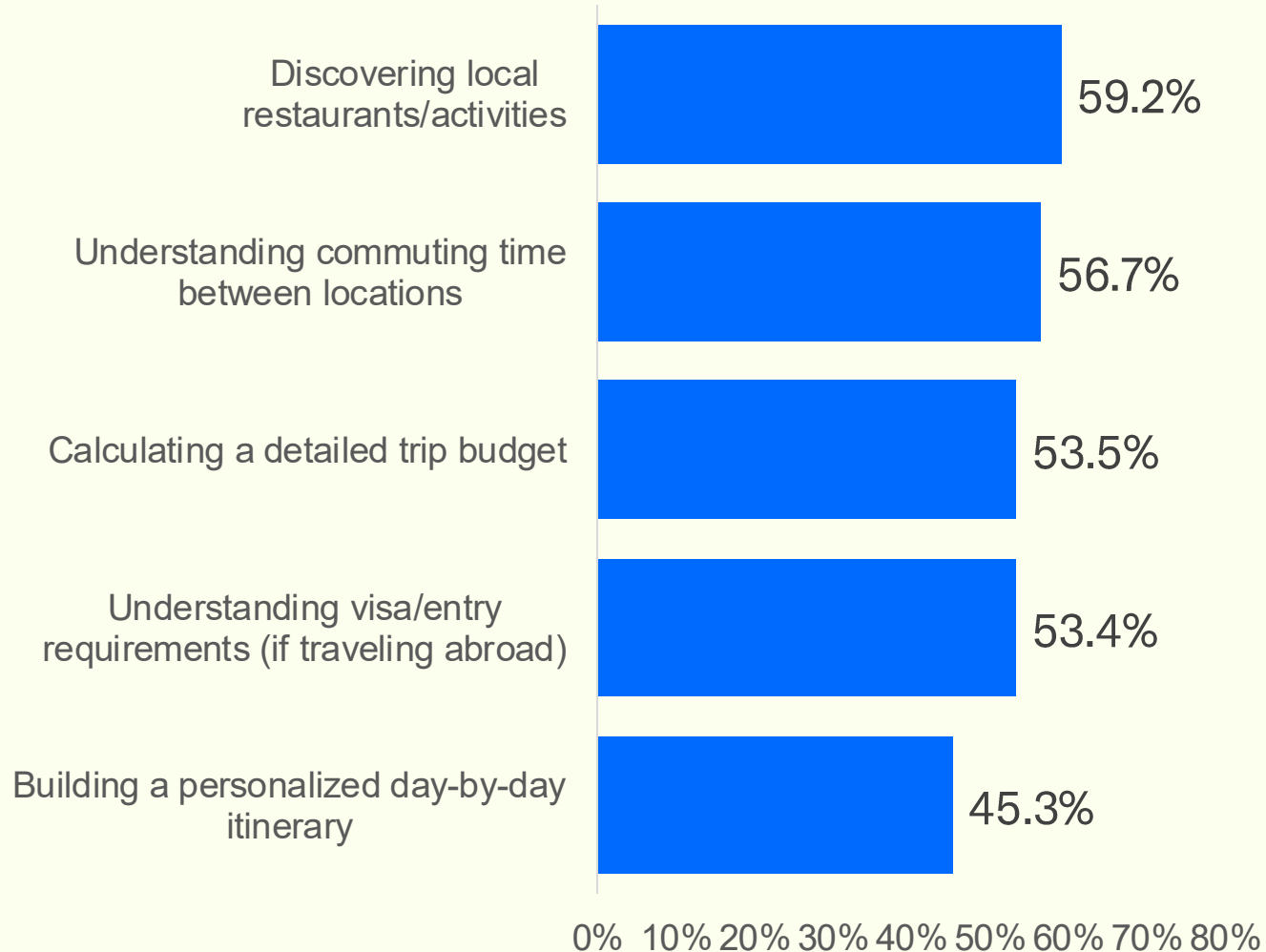
17.3%

Travelers Turn to AI Primarily for Research, Less Often for Transactions

Question: In the PAST TWELVE (12) MONTHS, have you used an Artificial Intelligence (AI) tool specifically to do any of the following for your travel?

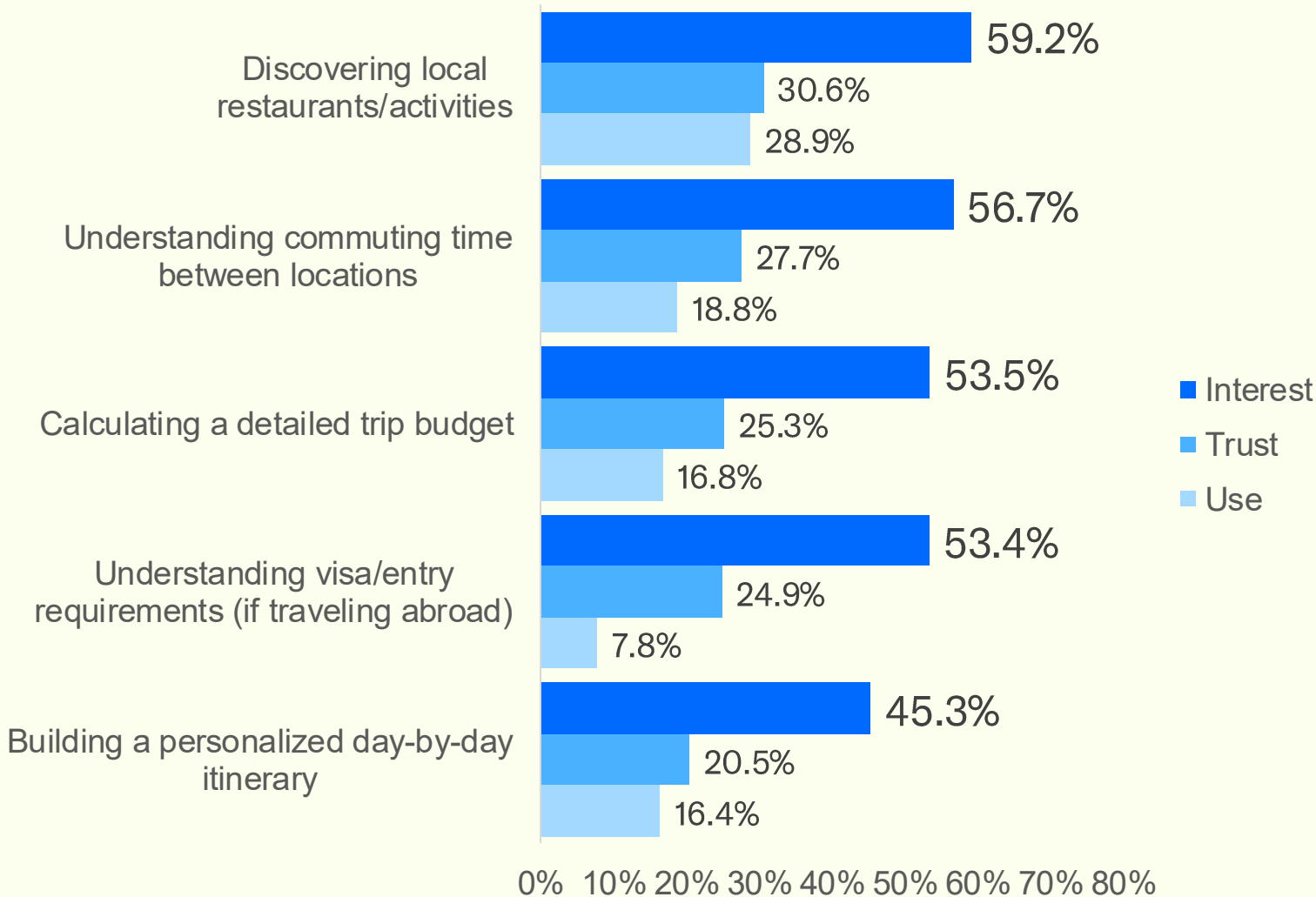


After Destination Decision, Travelers' Interest in AI to **GROWS**



Question: Now, imagine you have already decided on a destination for your next trip. How interested would you be in using Artificial Intelligence tools to do each of the following?

But Trust & Use still have a long way to go



Question: Now, imagine you have already decided on a destination for your next trip. How interested would you be in using Artificial Intelligence tools to do each of the following?

An Authenticity Question

The Popularity Bias

“

59% worry AI favors “popular” locations over what is actually best for them.



The Character Deficit

“

48% do not trust AI to understand a destination’s true character.



Conversion: The Trust Cliff



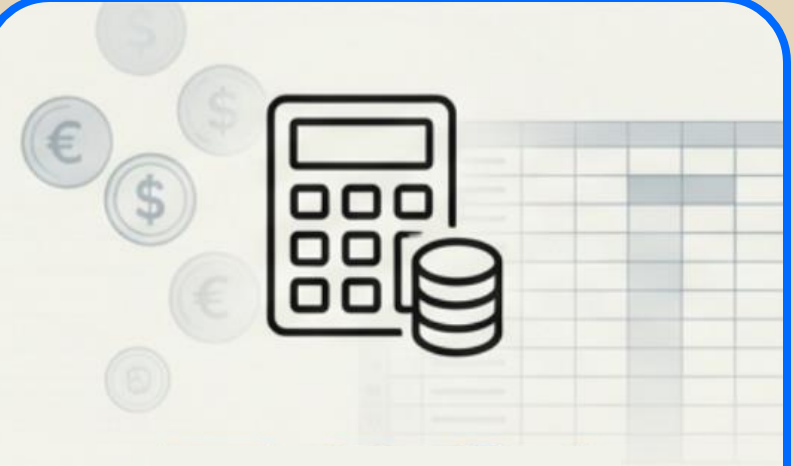
40.4%

Believe AI provides better deals and recommendations



34.0%

Say AI would be valuable if it guaranteed the best price

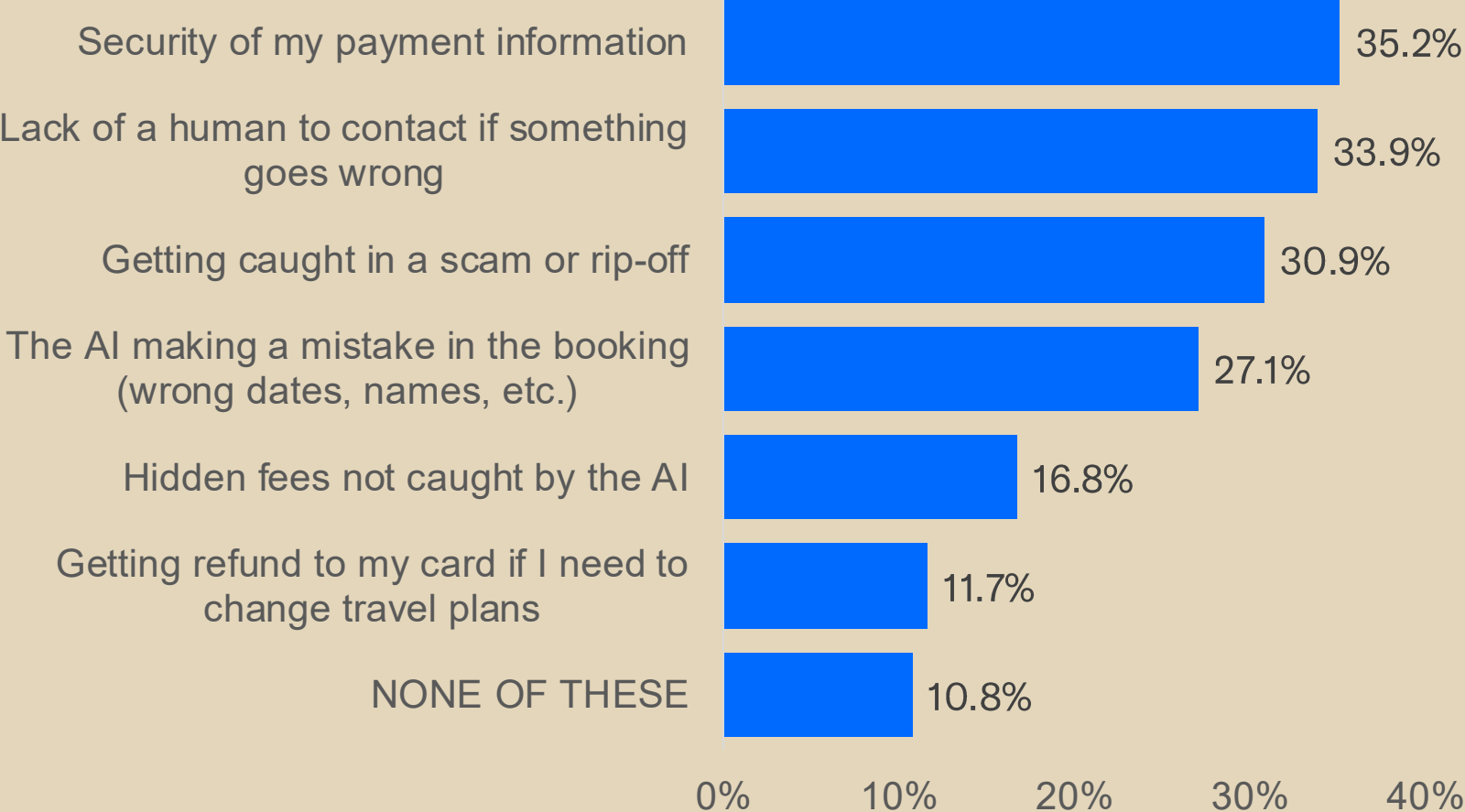


7.9%

Very comfortable providing credit card info to AI

Lowest-Price Guarantees are Not Enough to Buy Traveler Confidence

Question: What would be your biggest concern about having an Artificial Intelligence (AI) tool book and pay for your travel?



While Traveling: Interest in Friction Removal is High

Future Partners

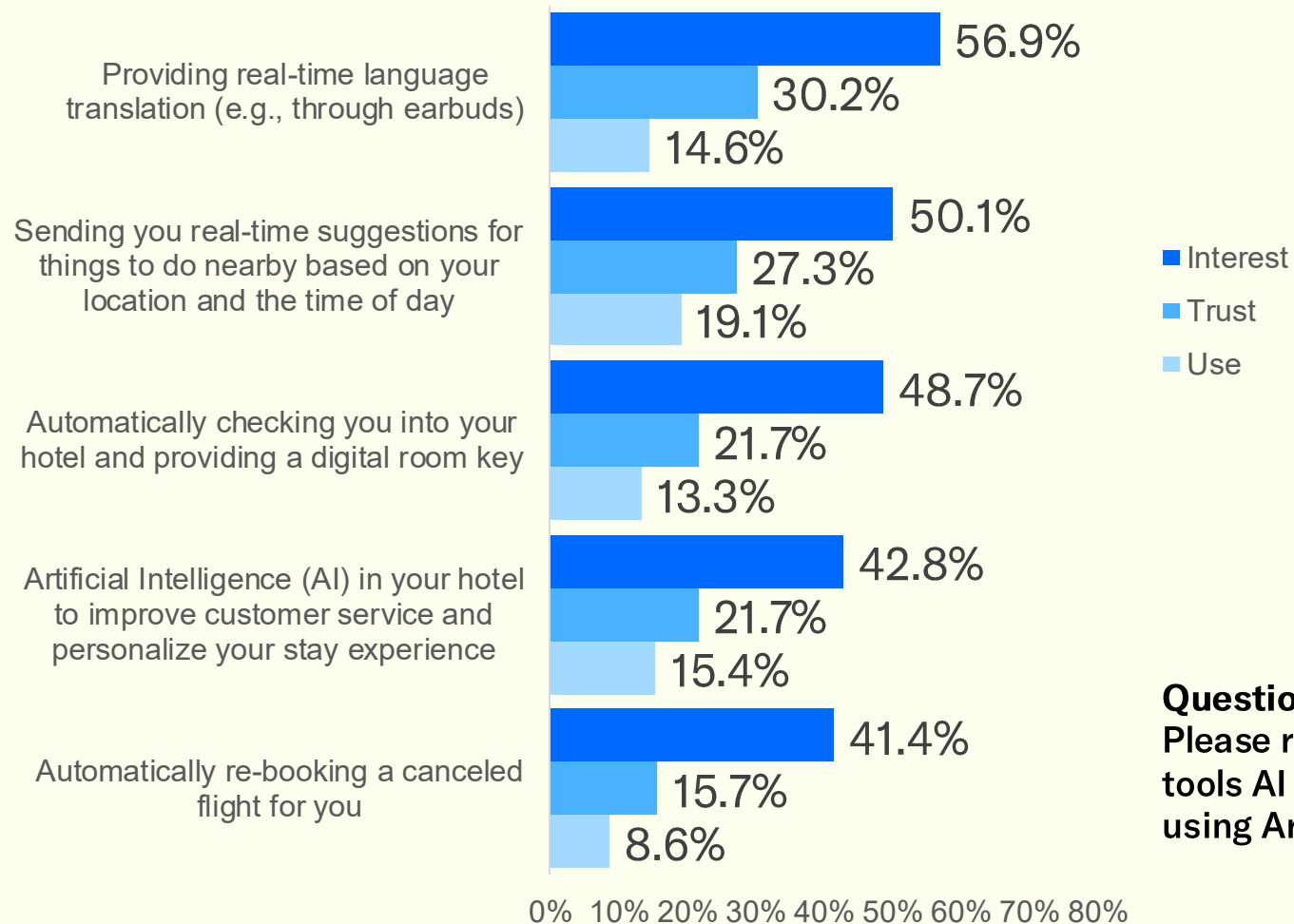


While Traveling: Interest in Friction Removal is High



Question: Now, think about when you are actually on your trip. Please rate how you would feel about using Artificial Intelligence tools AI for the following tasks. How interested would you be in using Artificial Intelligence tools to do each of the following?

While Traveling: Interest in Friction Removal is High, but **Actual Adoption** Lags Behind



Question: Now, think about when you are actually on your trip. Please rate how you would feel about using Artificial Intelligence tools AI for the following tasks. How interested would you be in using Artificial Intelligence tools to do each of the following?

Local Expertise Remains the Gold Standard for the in-destination Experience

AI is accepted in visitor centers and hotels as a supplement, not a replacement.

59.7%

Preference For
Local Expert Advice

68.7%

Important that Real
People are Available

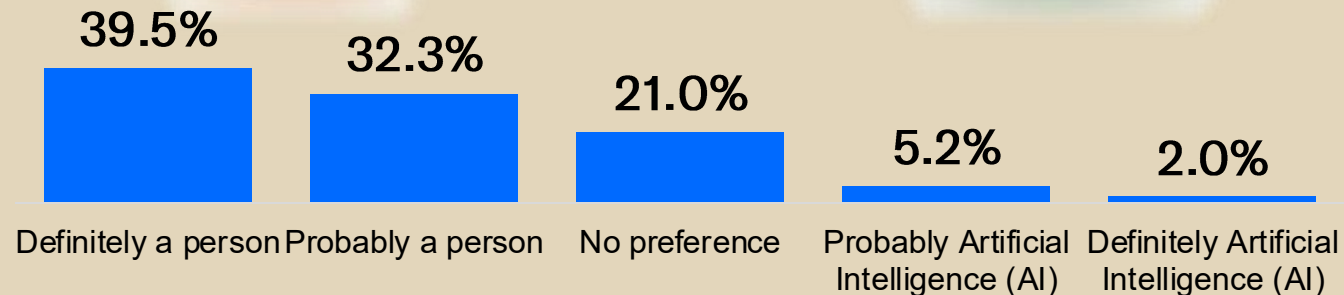


40.2%

Comfortable with AI
Hotel Front Desk

46.4%

Appreciate AI-
powered amenities
in Hotel rooms



Question: Which would you feel more confident about getting local travel advice and opinions from? (Select one)

Future Partners

Post-Trip: AI is Trusted to Organize Memories, Not to Write Them

The Librarian (Accepted)

- ✓ **52%** Map places visited
- ✓ **50%** Auto-curate photo albums



The Author (Rejected)

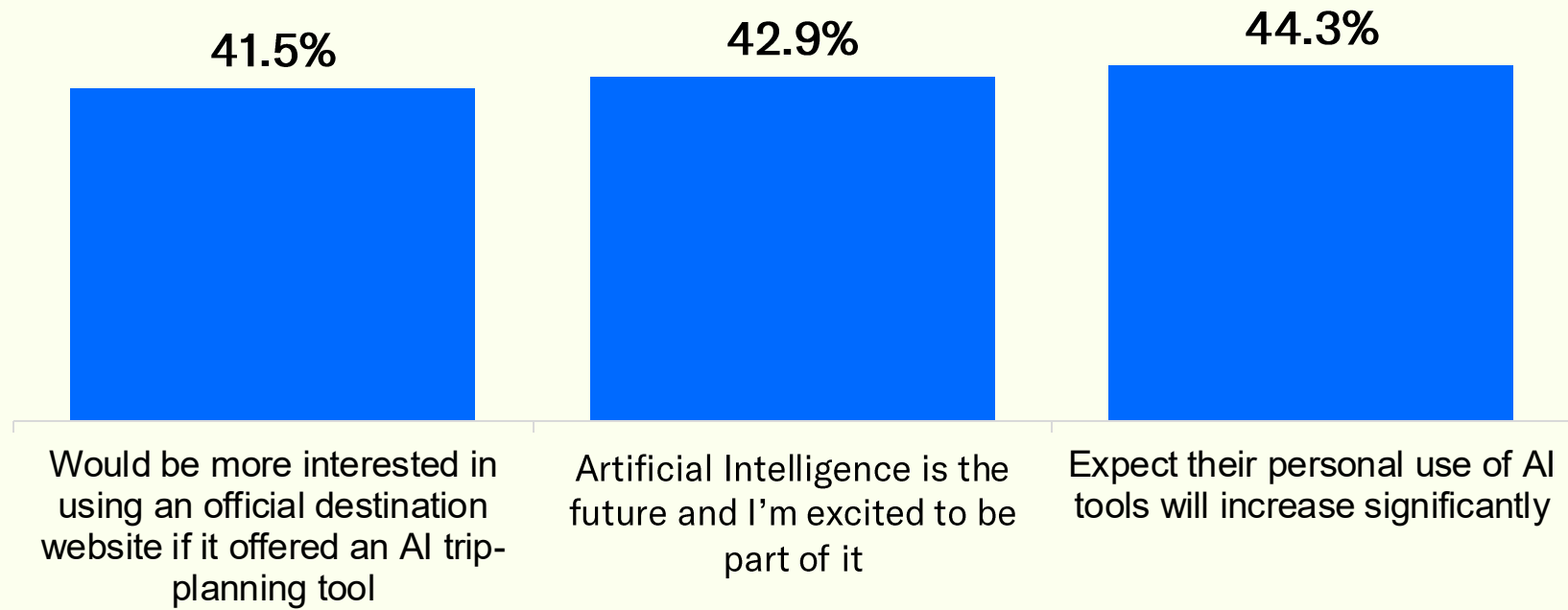
- ✗ **26%** trust AI to draft 'thank you' messages
- ✗ **23%** trust AI to write social posts/blogs



Travelers reject AI trying to mimic their personal voice. They want organization, not artificial storytelling.

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Looking Ahead: AI's Future In Travel



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Hotels

Find great hotels at low prices

User:

Find me a beach hotel this weekend
with pool and breakfast.

AI:

Found one with sea view,
pool, and free breakfast.
From \$70/night.

User:

Book it for Fri to Sun.

AI:

Booked.
Confirmation sent to your email.

We Asked Travelers...



David Reichbach

Vice President of Development
dreichbach@futurepartners.com

Thank You!



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[Livestream Calendar](#)

