

So What?!

Decoding Traveler Sentiment and Behavior to Guide Your Path Forward...

Amir Eylon
May 4, 2026



FACT:

I Have Two Versions Of My Presentation!



OR



FACT: I Have A Lot of Content!

- **I DO NOT get paid by the slide!**
- **I will move quickly!**
- **This presentation will be made available to you!**
- **So sit back, relax, and listen to my story!**



Today's Flow...

- **The Latest American Travel Sentiment**
- **A Few Key Learnings & Trends**
- **So What?!**
- **Discuss...**

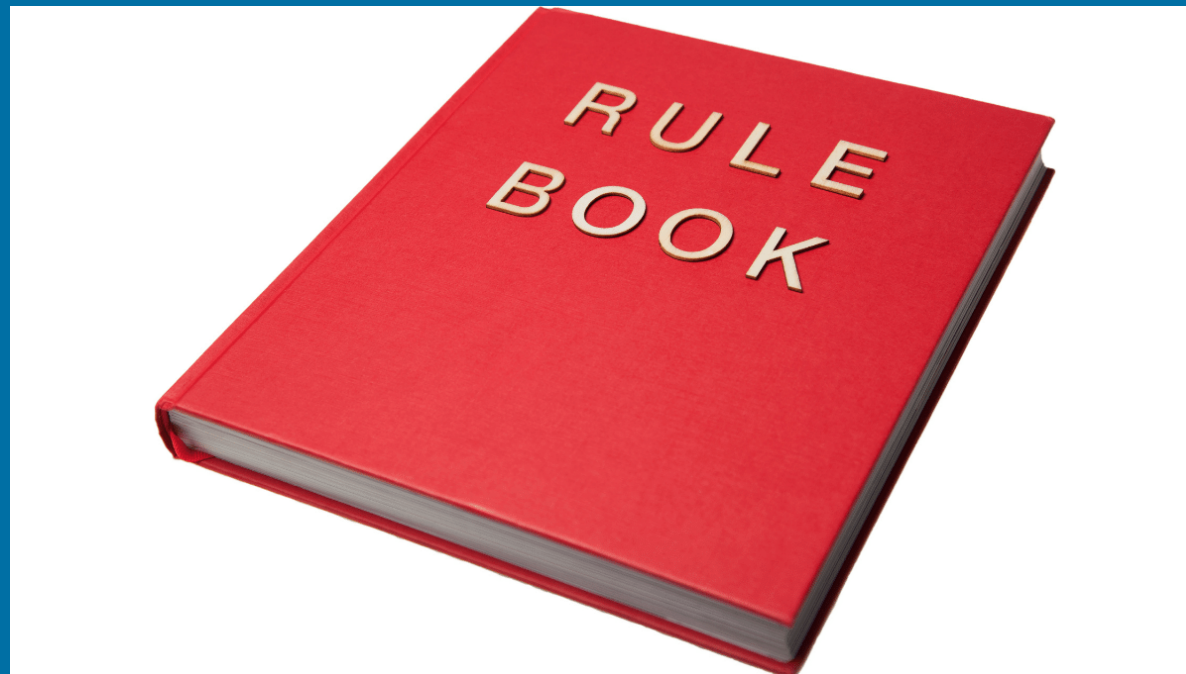


But First... Let's Acknowledge the Day...



But First...

Two Rules...



So What?!

WHEN YOU SEE THIS SLIDE...



Audience Question!

WHEN YOU SEE THIS SLIDE...



...And If You Laugh At My Jokes and Answer My Questions:

We Have Beer For Later!

(Is This Now a “Beer With Amir Session?!”)





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 200 Destinations and Brands



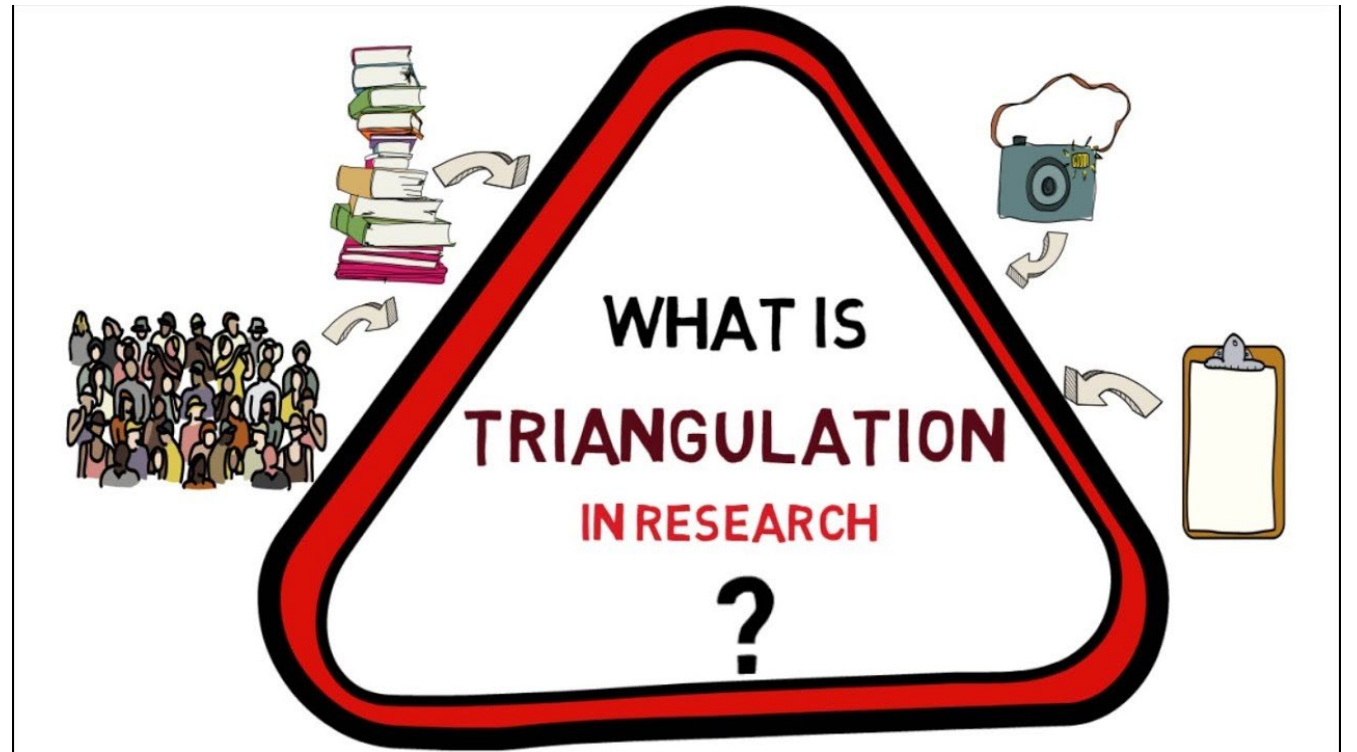
We Learn More When We Triangulate!*

Greater Clarity Into:

- WHO?
- WHAT?
- WHEN?
- WHERE?
- WHY?
- HOW?

But Most Importantly:

SO WHAT?!



*Triangulate Sentiment Research with Longwoods Travel USA Research

2026 Travel Plans

American Travel Sentiment Study

WAVE 106 : GAS PRICES AND THE IRAN WAR

April 23, 2026

Longwoods
INTERNATIONAL

miles
PARTNERSHIP

American Travel Sentiment Methodology

The American National 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: April 7 – 8, 2026
- 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.





The Current Lay of the Land!

ANOTHER FACT:

Our industry ALWAYS faces headwinds!

- **There is ALWAYS a crisis... (TSA, Iran, Economy...)**
- **The playing field is ALWAYS changing...**
- **Technology is ALWAYS evolving...**
- **There are ALWAYS surprises...**

While We Live in a Time of **DISRUPTION**:

Global Events
Politics
Economy (K shaped)
Artificial Intelligence
Etc...

Both in our personal and professional lives...

Remain Calm!

Avoid the Temptation to Be This Guy!



Keep This In Mind:

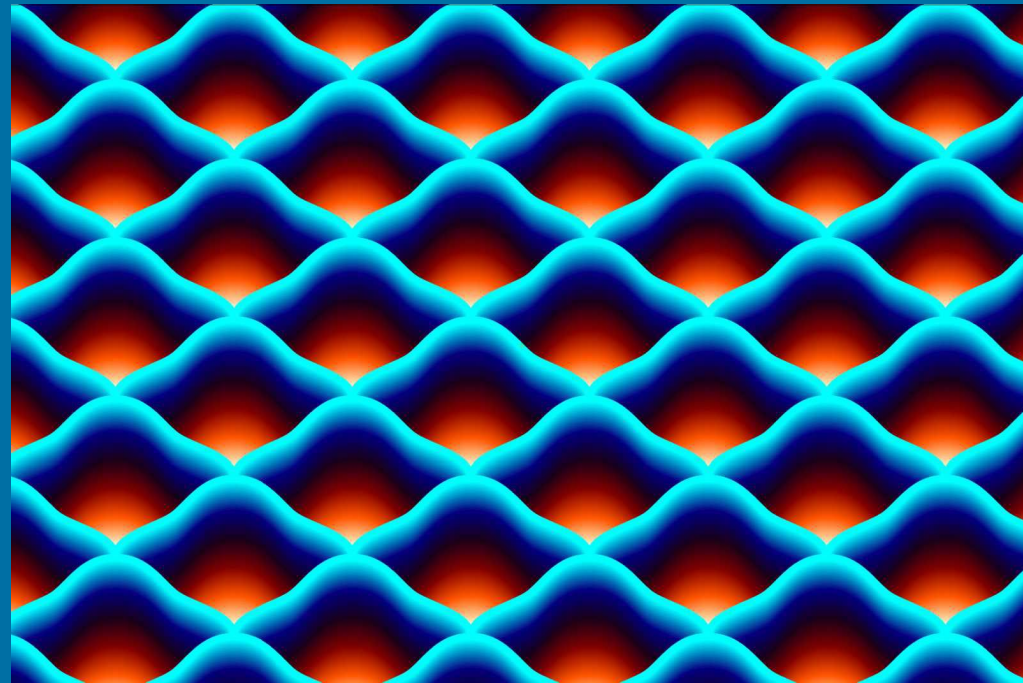
Many Old Trends Are New Again!



Keep This In Mind:

So many patterns are repeating...

But in new ways/opportunities...

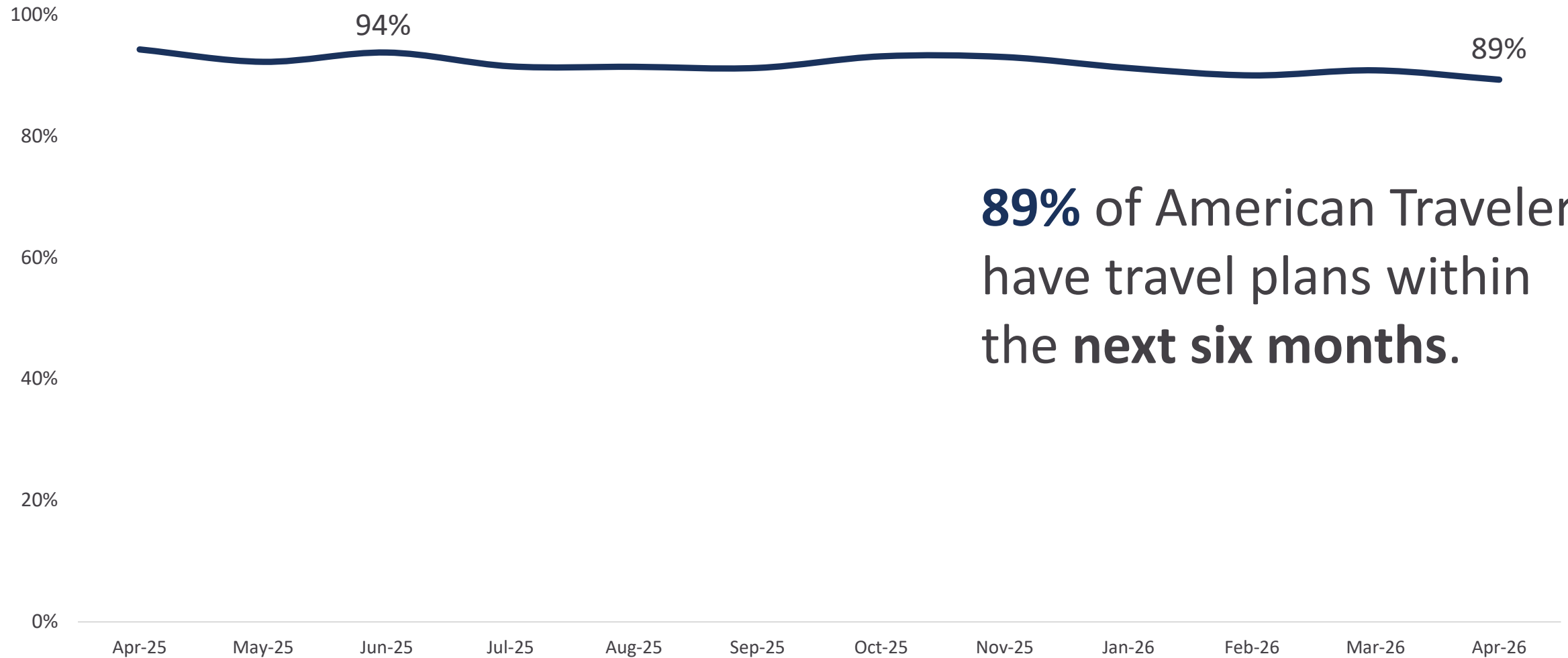


My Biggest Point:

Nationally: Despite the Headwinds and what is being felt locally in NH recently...



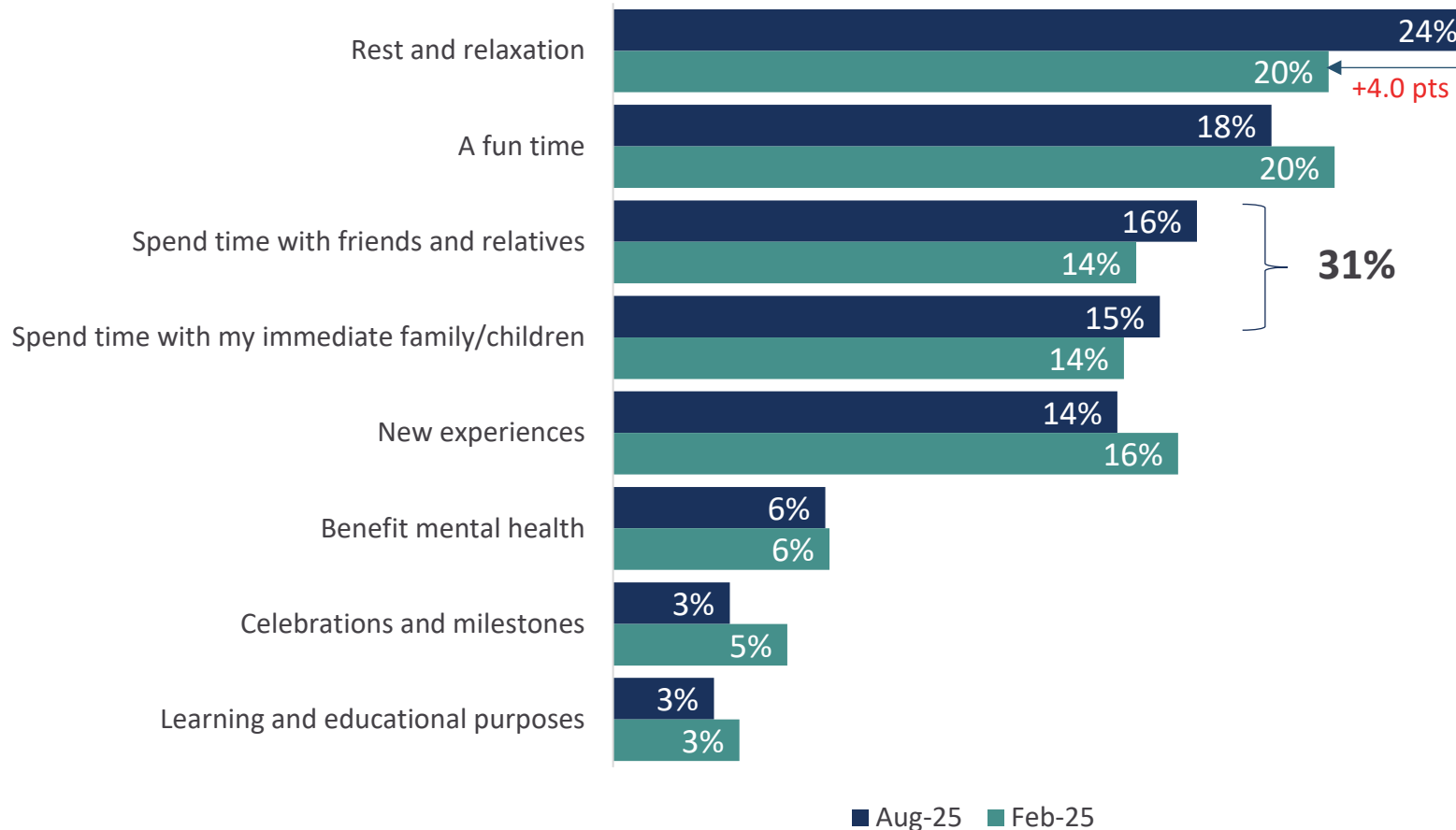
Travel Plans Within the Next 6 Months



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

Spending Time with Family/Friends and Rest/Relaxation are Top Motivators for Leisure Travel

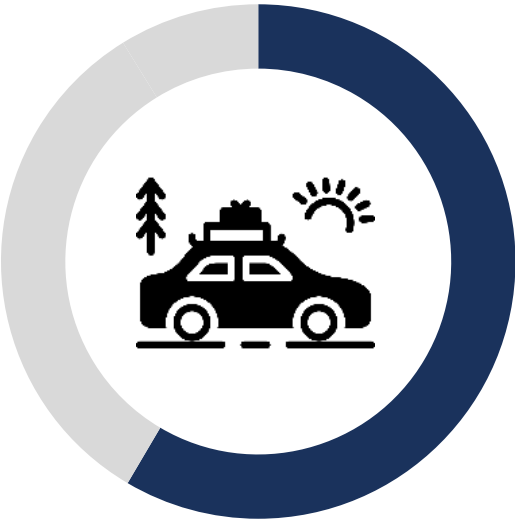
What is your main motivator for leisure travel?



The primary motivation for leisure travel is to **spend time with family and friends (31%)**. **Rest and relaxation (24%)** also continue to be a top motivator, **increasing 4-points** since February 2025.

More Travelers are Traveling by Plane for Their Next Trip Than Last Year

What is the next trip you plan to take?



58% -4.9 points vs January 2025

Domestic Road Trip



33% +5.1 points vs January 2025

Domestic Air Travel



9% No change vs January 2025

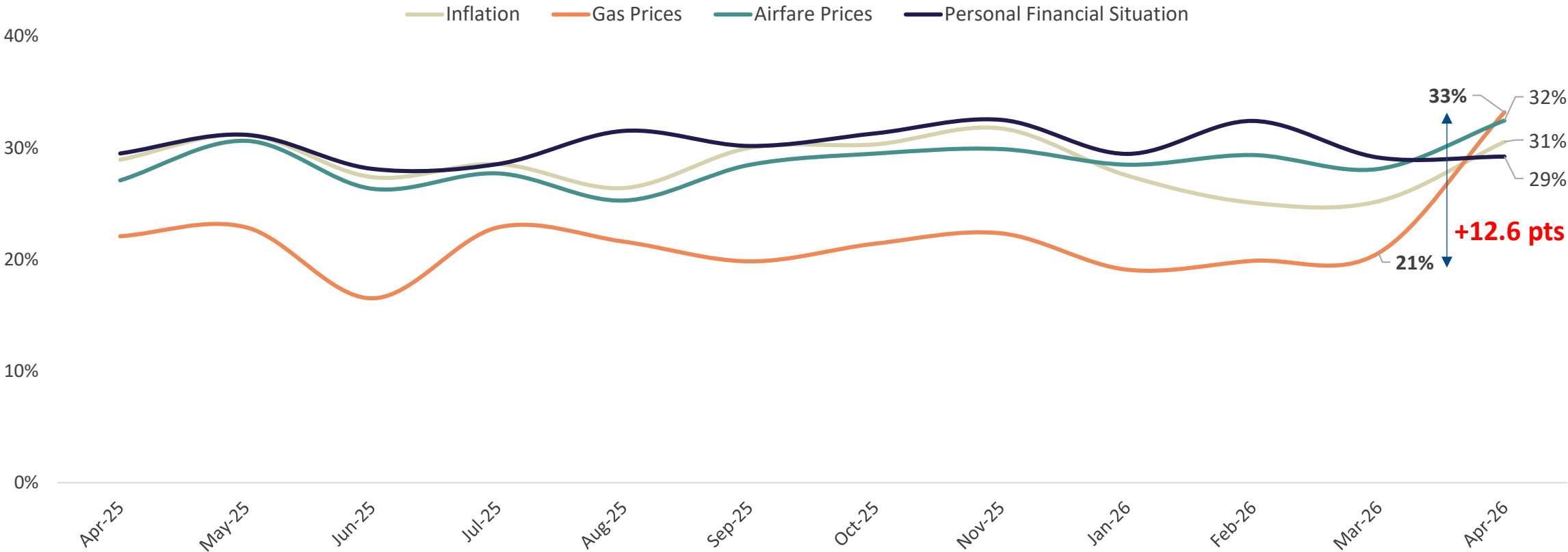
International Travel

Source: Longwoods International ATS Wave 103
Percentages are based only on respondents who are confirmed travelers and have confirmed future travel plans

But...Concerns About Gas Prices Impacting Travel Plans Highest Since July 2022

Concerns Impacting Your Travel Decisions in the Next Six Months

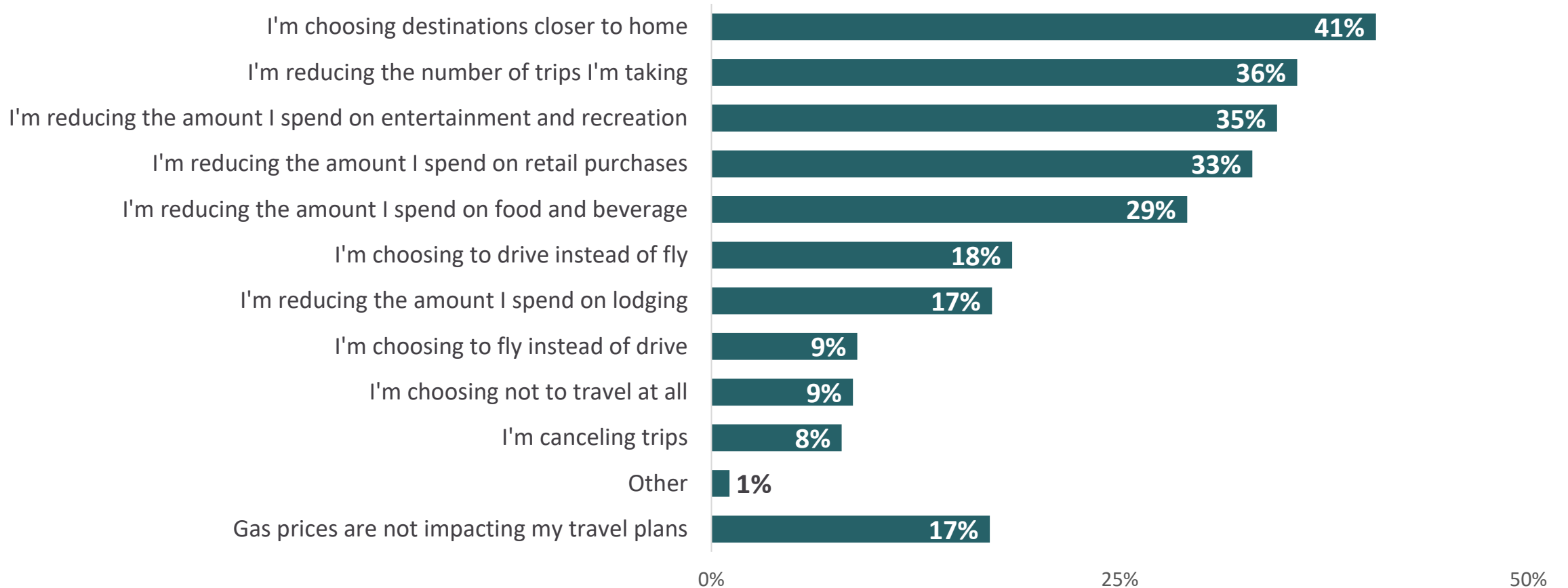
The chart shows the percentage of respondents who rated each factor as "Greatly impact" their travel plans (a 5 on a 1-5 scale) over the period from April 2025 to 2026.



Source: Longwoods International ATS Wave 106
Percentages are based only on respondents who are confirmed travelers and intend on traveling in the next six months

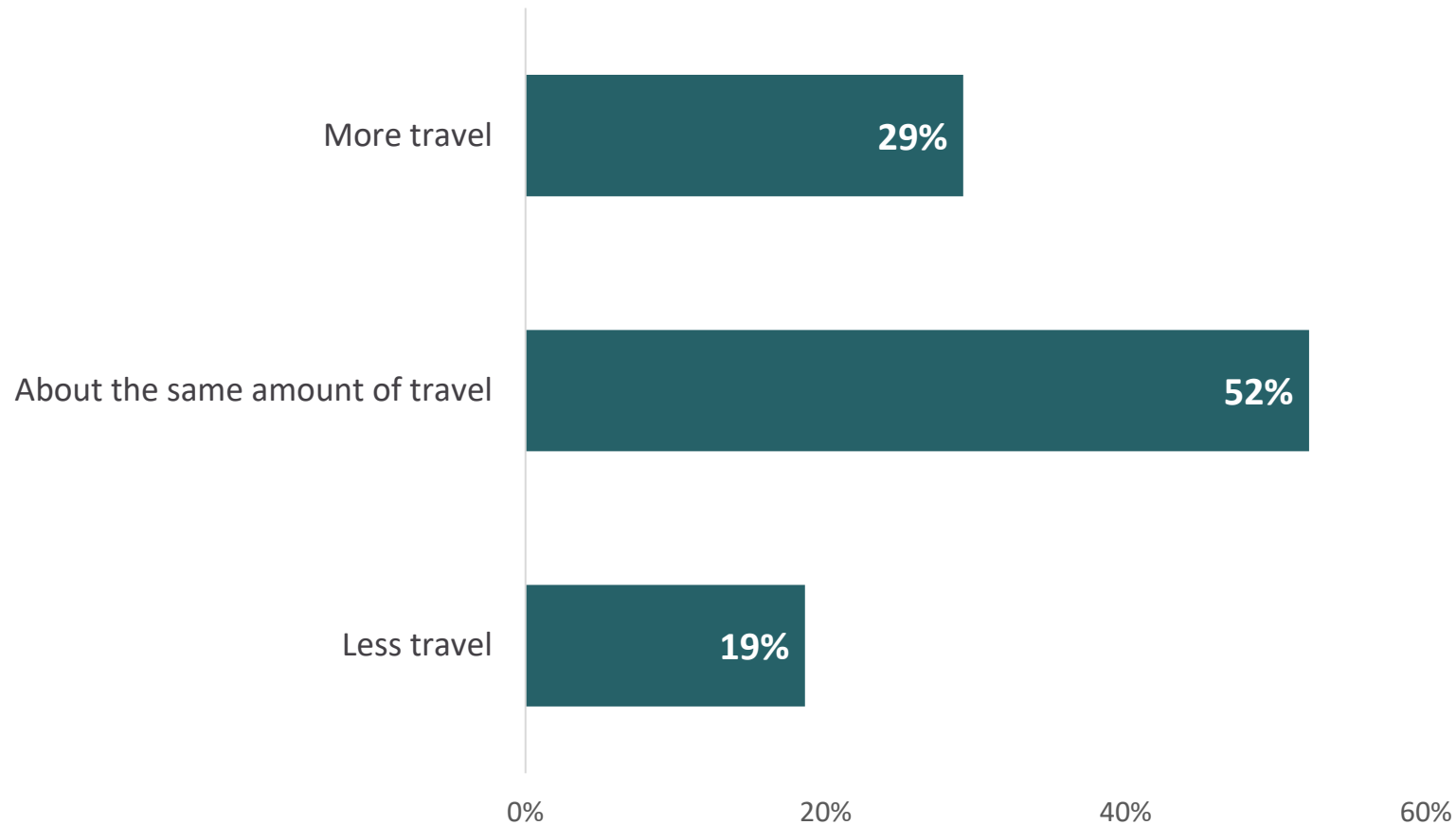
While 8% Cancelling, Most of the Rest Just Re-Allocating Spend on Trip!

During the next six months, how are gas prices impacting your travel plans?



3 out of 10 Travelers Plan to Travel More in 2026!

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

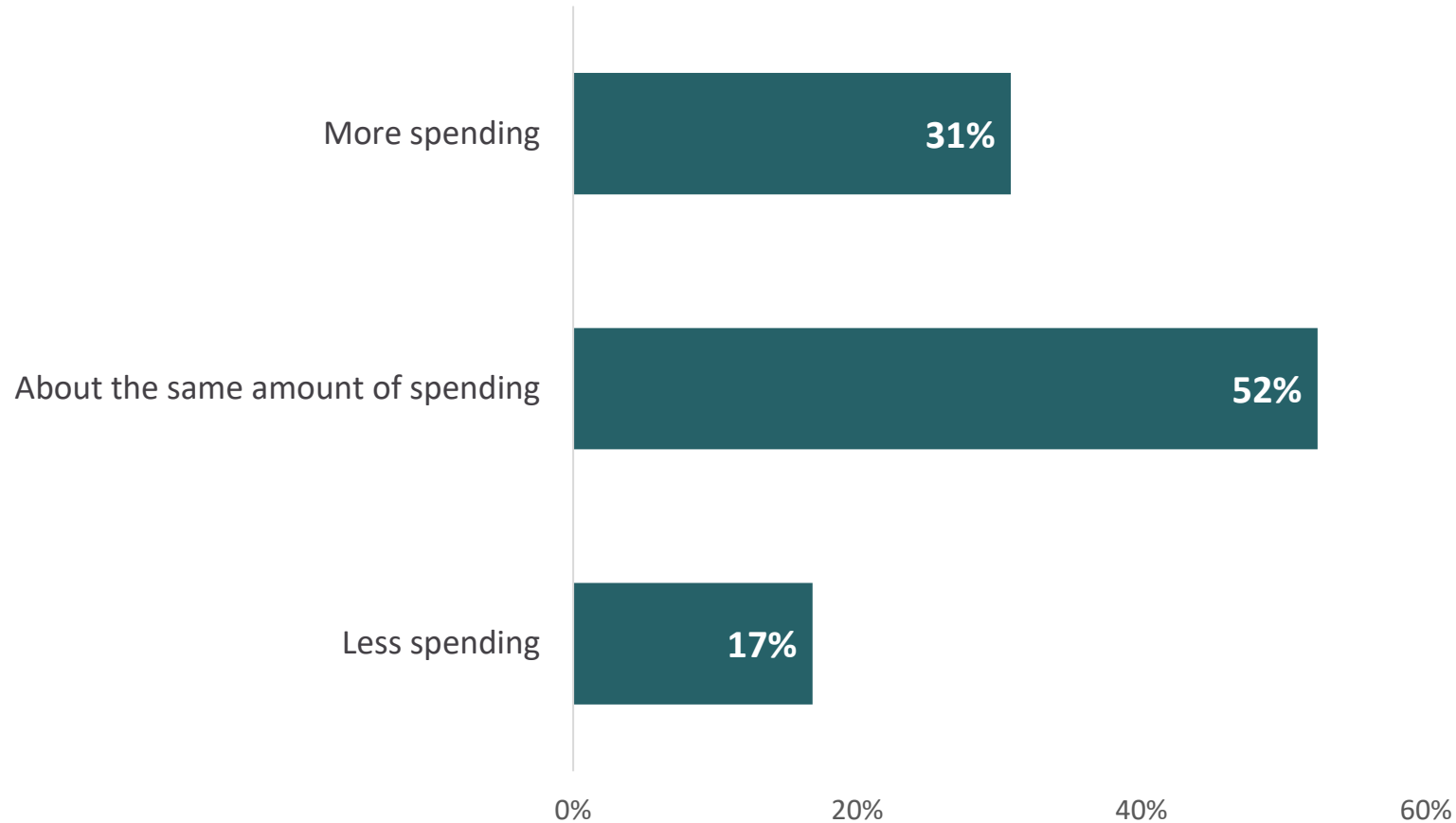


The **majority of travelers (52%)** are planning to travel about the same amount this year, while one-third of travelers (**29%**) are planning to travel more this year compared to last year.

Only **19%** of travelers plan to travel less this year compared to last year.

31% of Travelers Plan to Spend More on Travel This Year

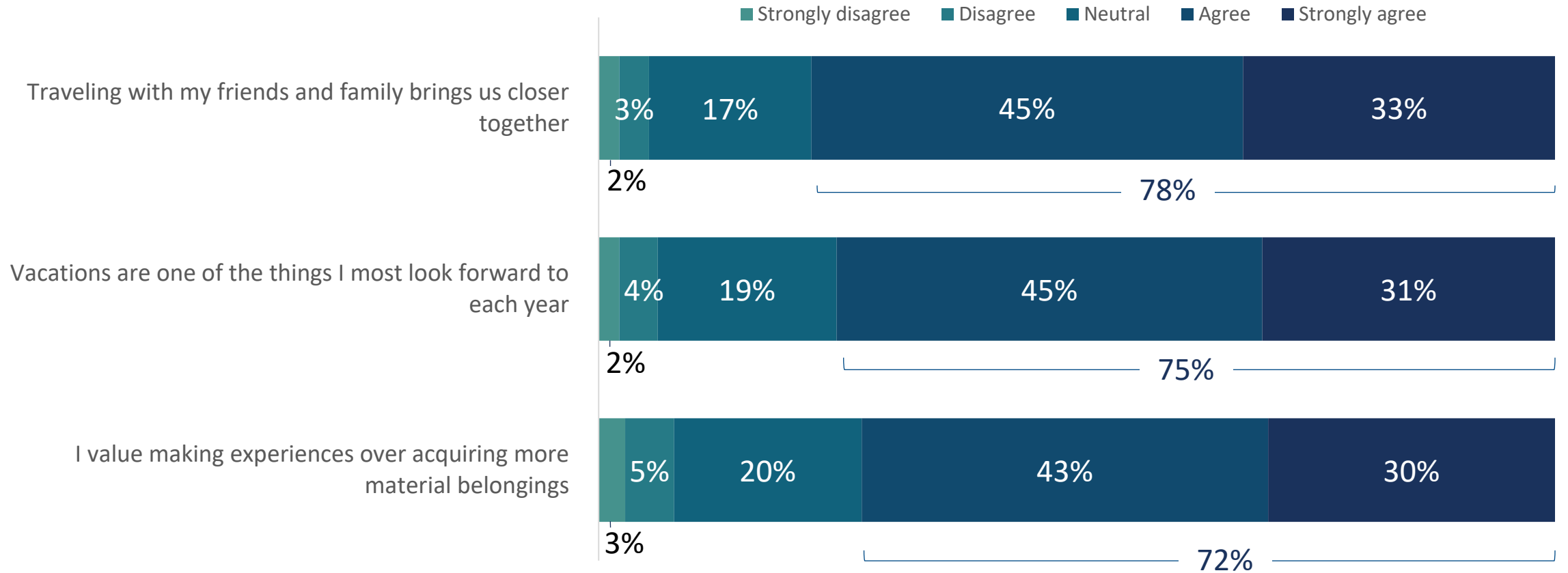
Compared to last year, how much do you plan to spend on travel this year?



Half of travelers plan to spend about the same on travel (52%) this year as they did last year. One-third of travelers (31%) plan to spend more on travel this year, outpacing those who plan to spend less.

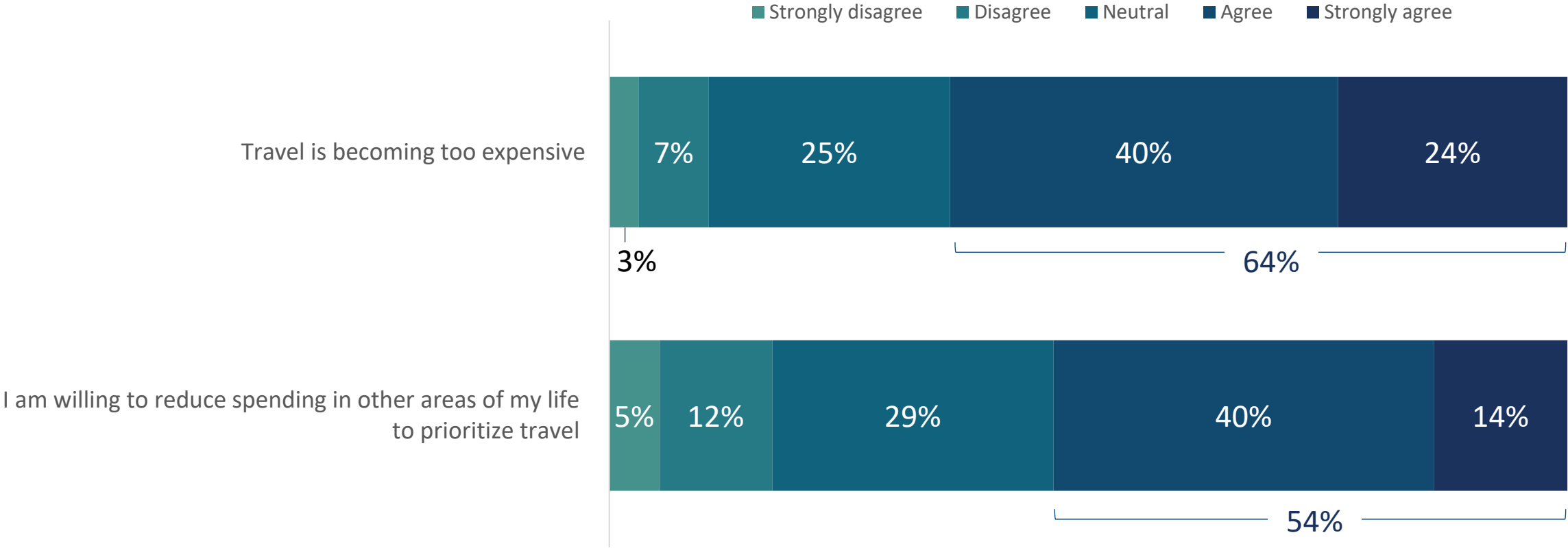
Travelers Overwhelmingly Place High Value and Importance on Travel

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



Majority of Travelers Prioritize Travel Despite Growing Concerns Over Travel Costs

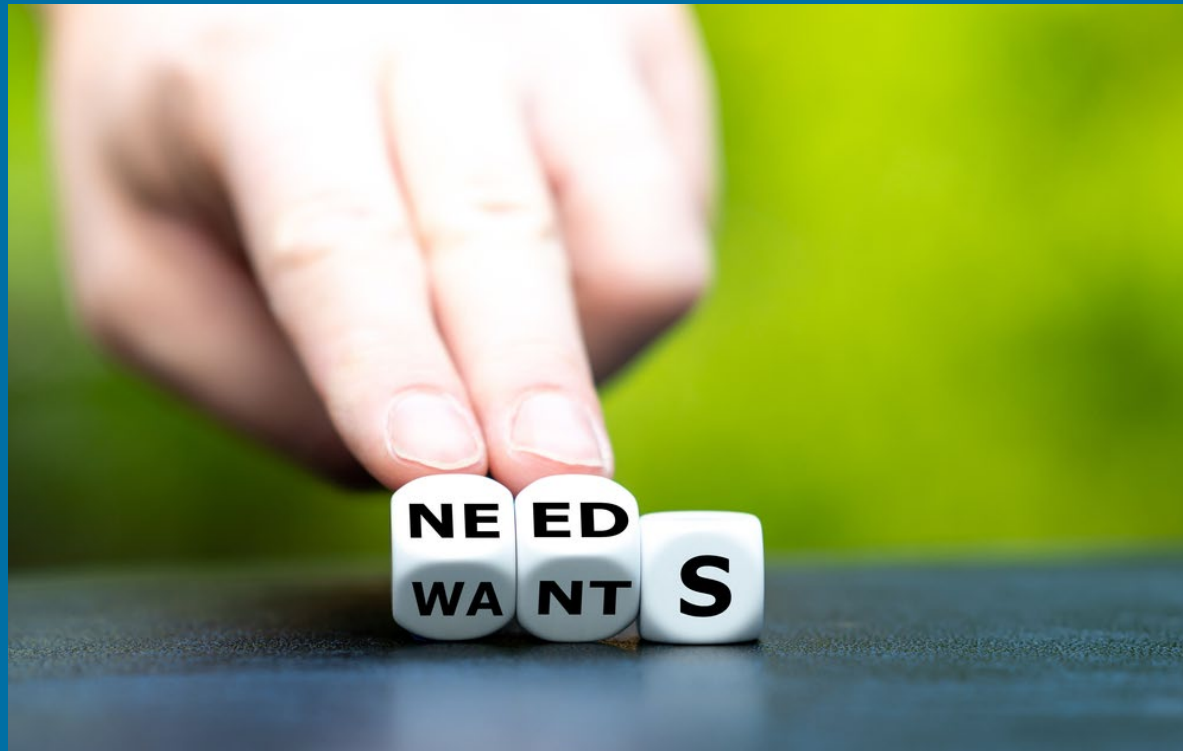
Using the scale below, please indicate your level of agreement with the following statement:



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

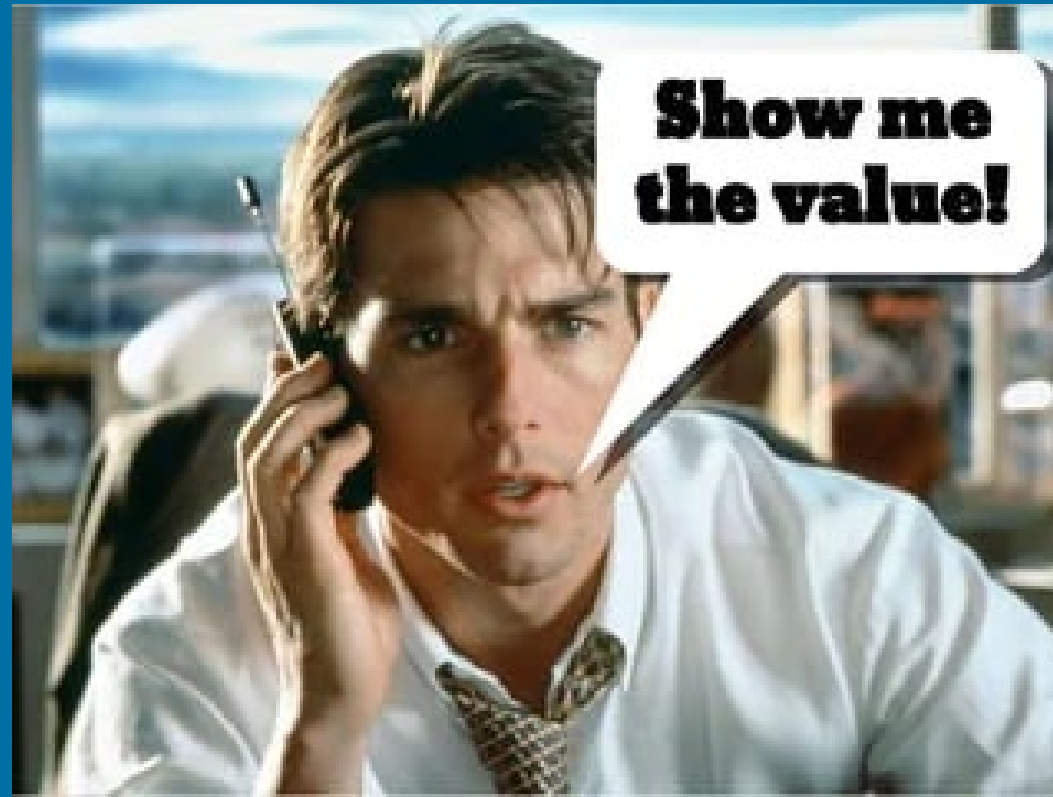
Key Learning...

**For American Travelers:
Travel has shifted from a WANT to a NEED!**



Key Learning...

They Want Deals More Than Discounts... Show Value!



So What?!

**Everything costs more... They are still travelling
but want a deal...**

Focus on Promotions... not Deep Discounts...

Value > Rate!



So What?!

Question to Ponder...

Is it worth actively marketing value in addition to experience?

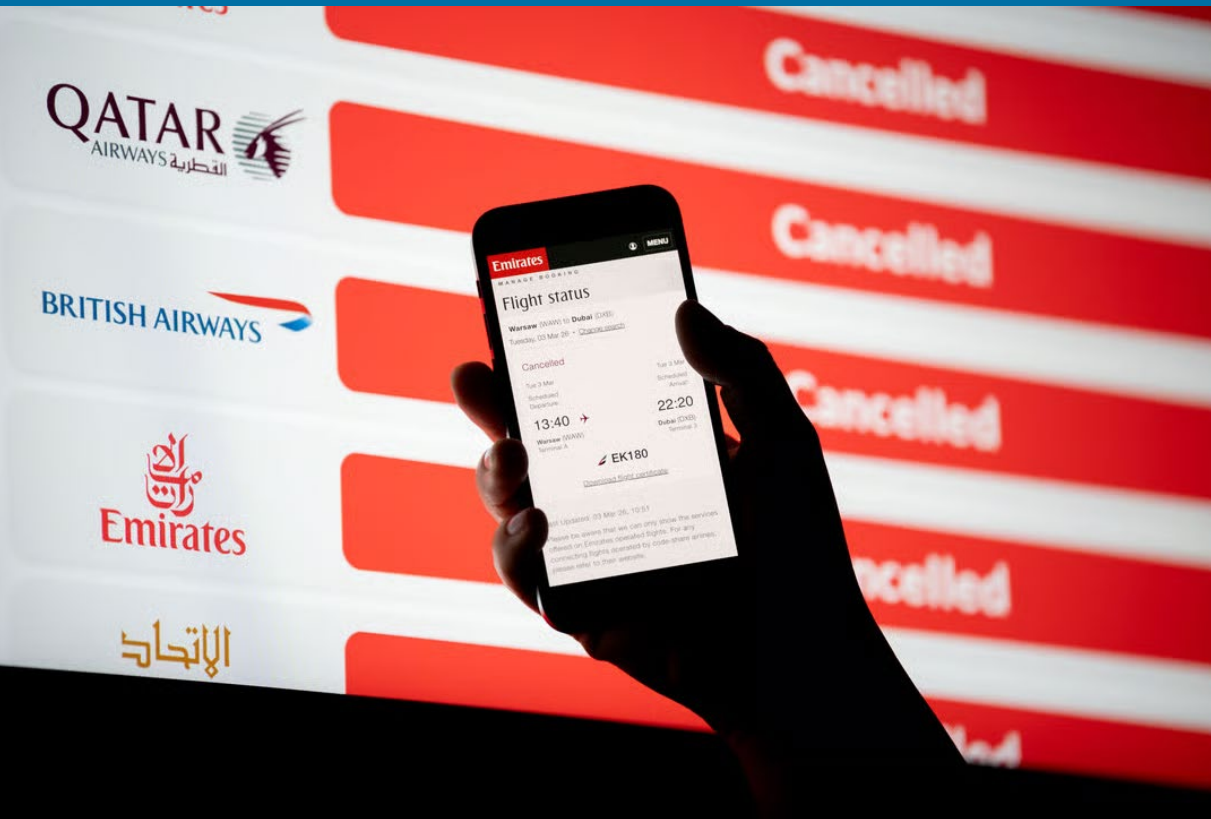


Audience Question!

Is anyone currently actively marketing value in addition to experience?

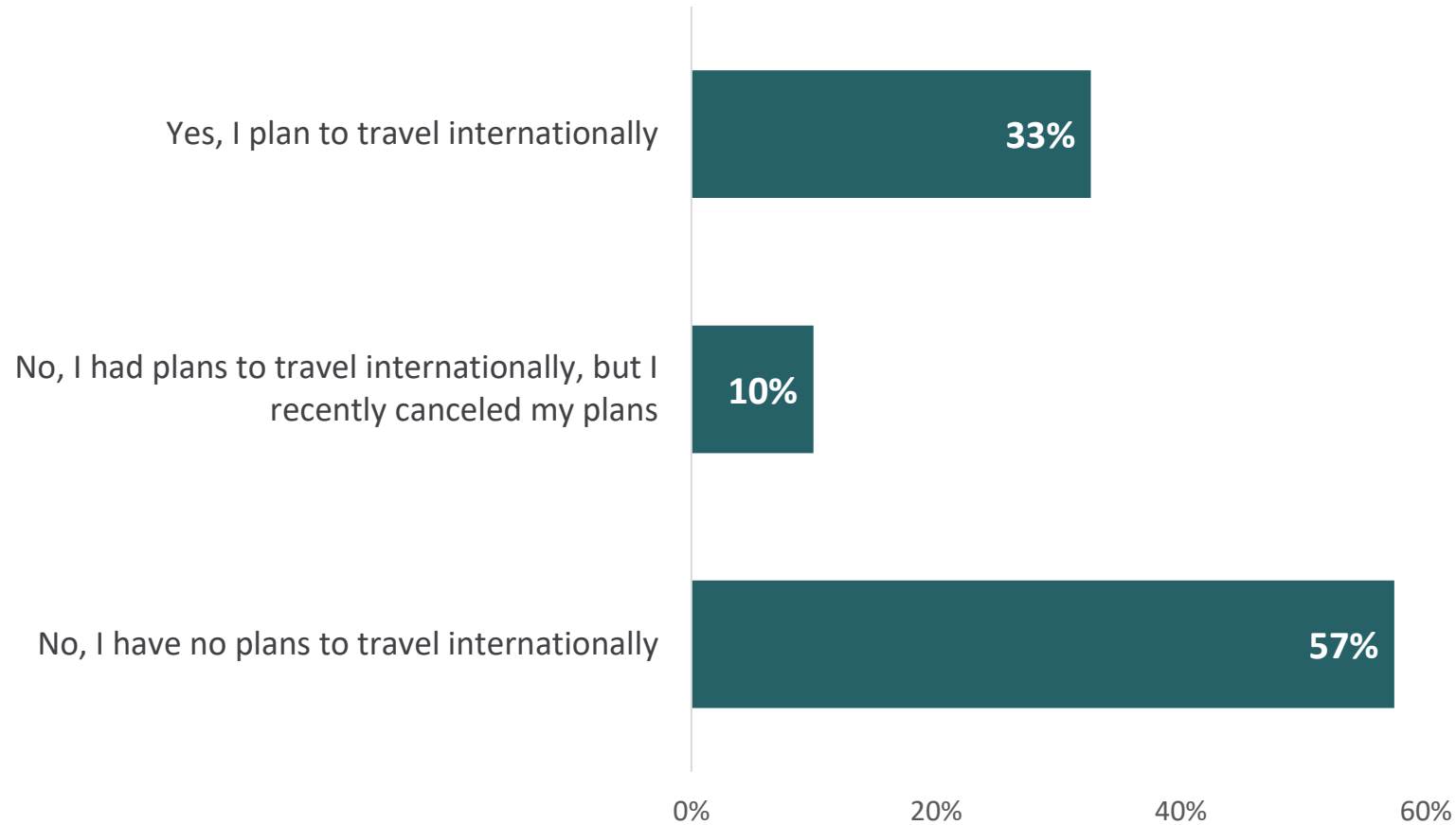


But Amir... What About The War In Iran?!



A Third of Travelers Plan to Travel Internationally

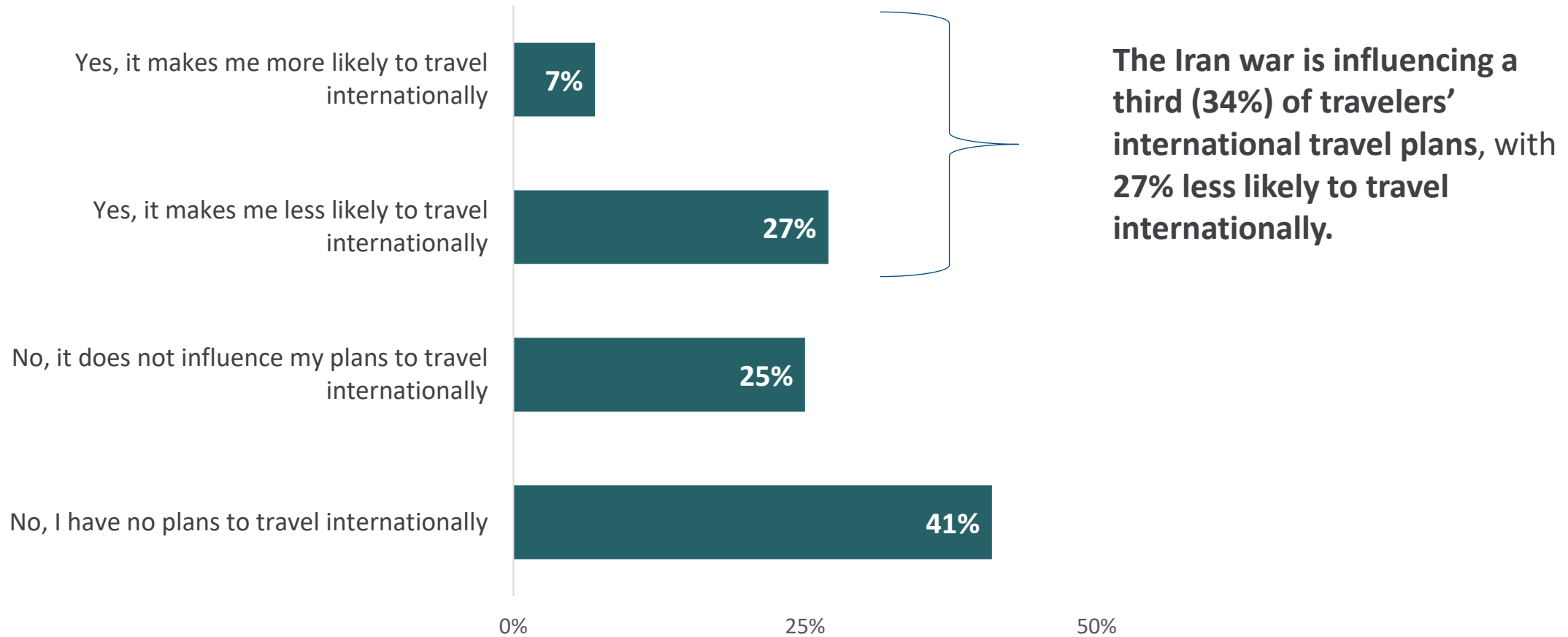
In the next 12 months, do you plan to travel internationally?



A third (33%) of travelers plan to travel internationally in the next 12 months.

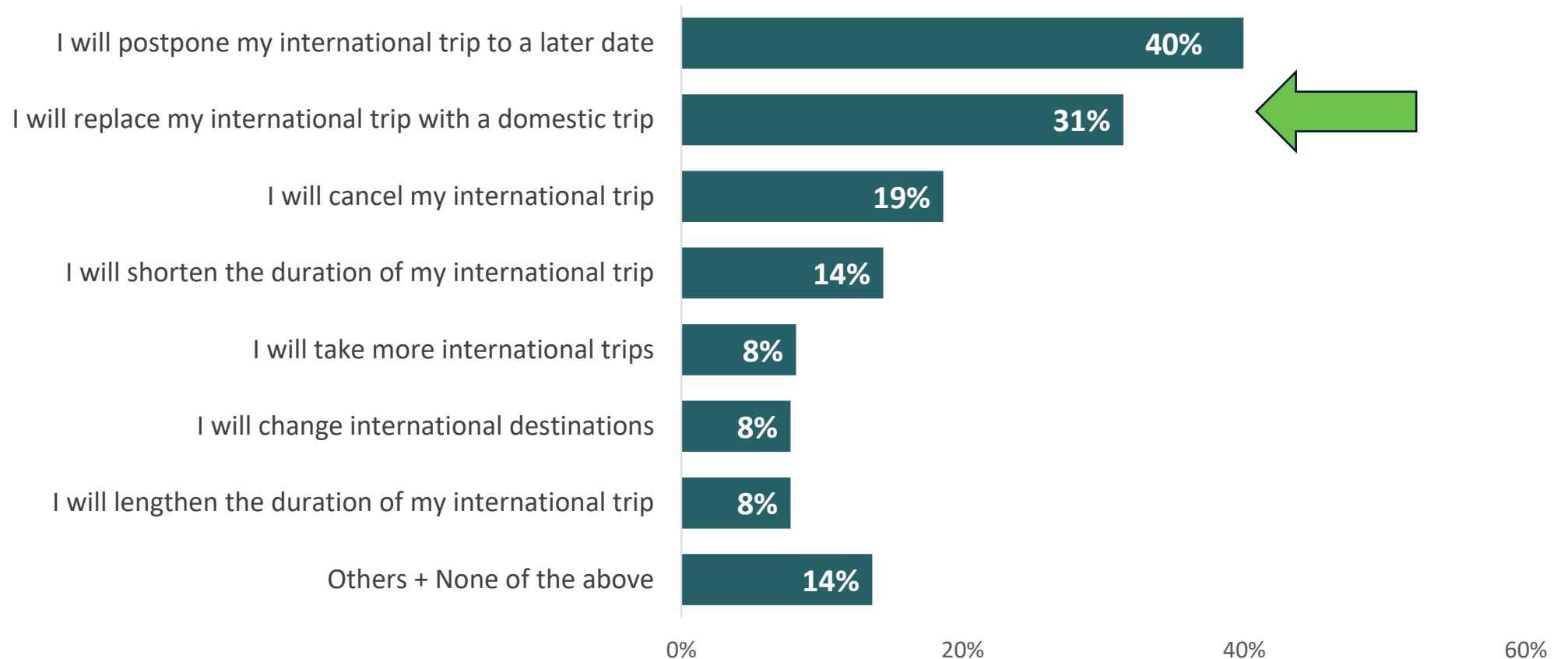
Iran War Influencing a Third of Travelers' International Travel Plans

Is the Iran war influencing you to change your international travel plans in the next 12 months?



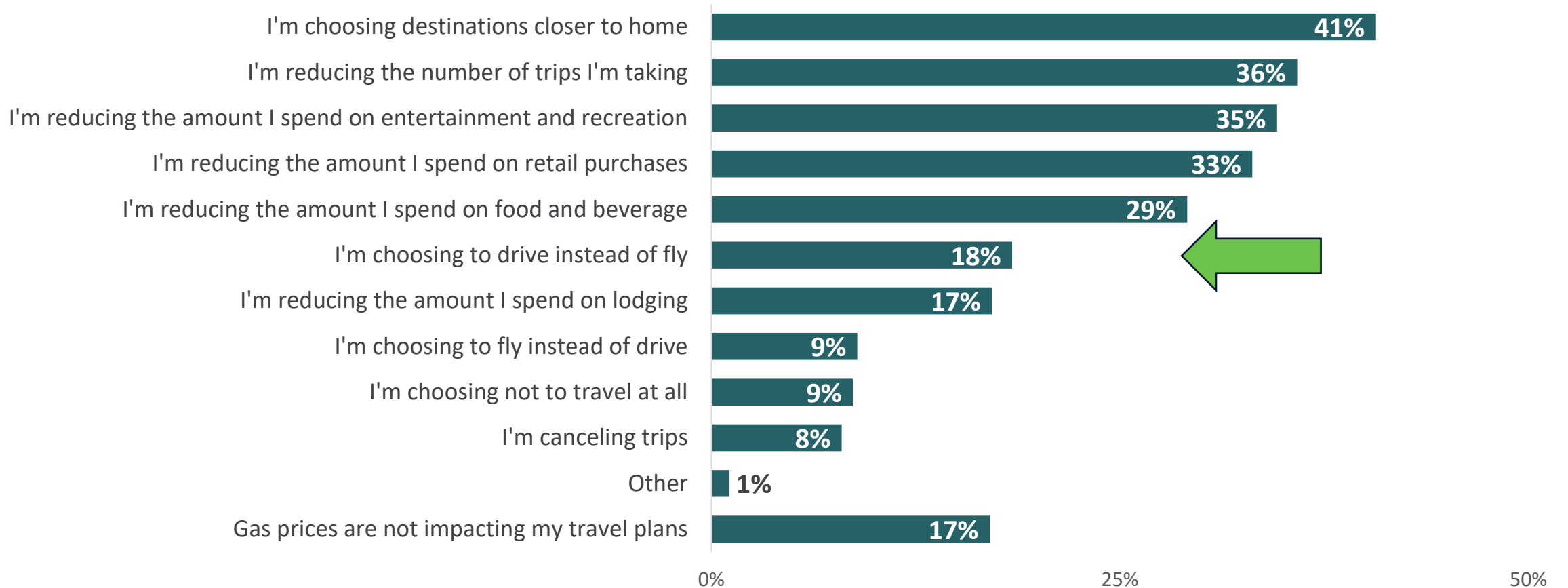
Domestic Travel Opportunity!

You indicated that the Iran war is influencing your international travel plans. How will you change your international travel plans in the next 12 months?



18% Are Choosing to Drive Instead of Fly!

During the next six months, how are gas prices impacting your travel plans?



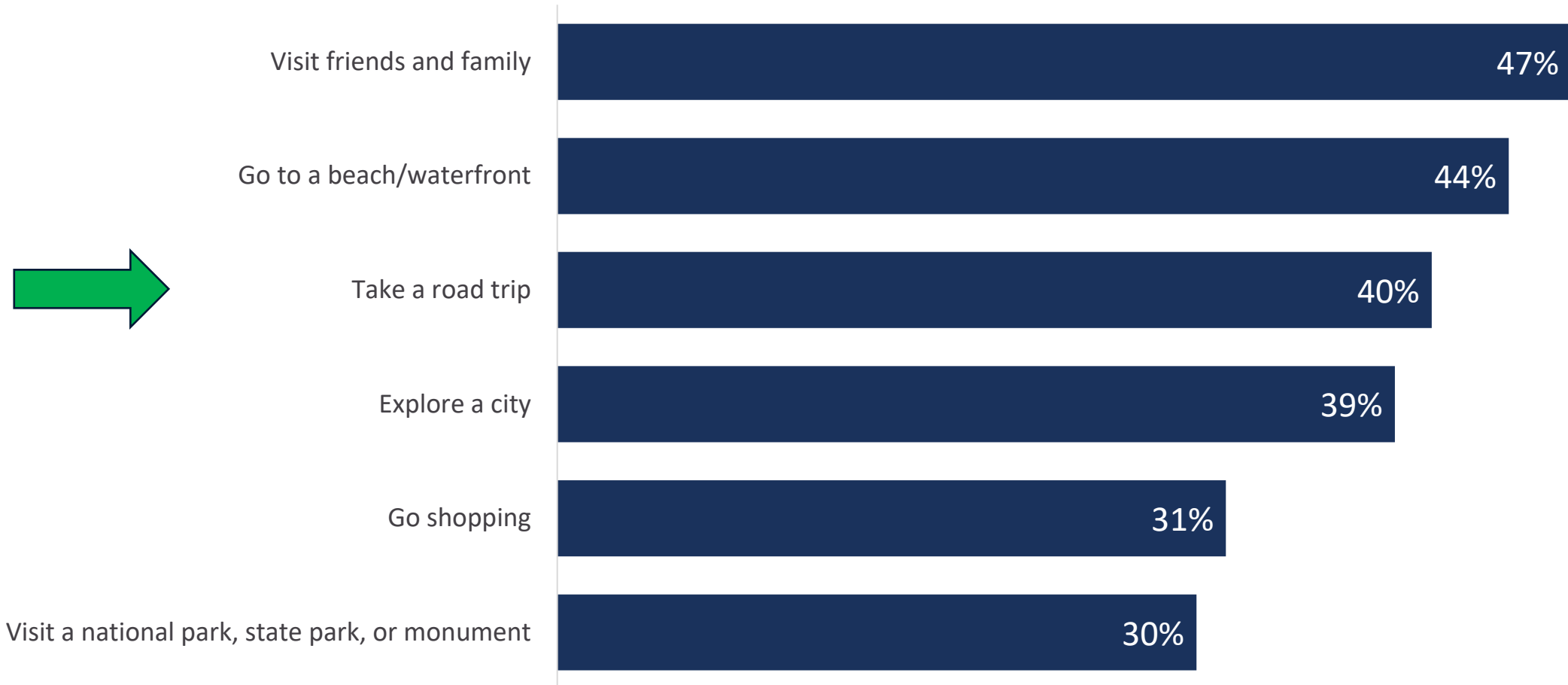
Key Learning... Same as 2025!

2026 – Still A Year of the G.A.R.T!



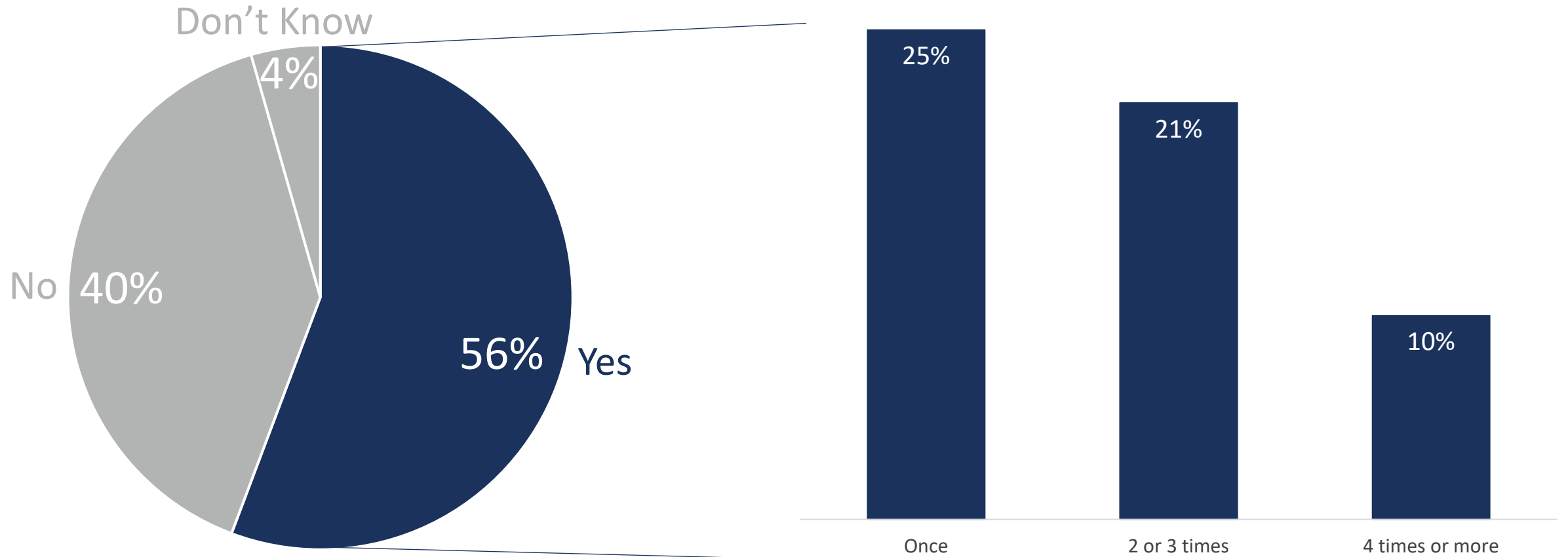
Visiting Family and Waterfront Escapes Lead Leisure Travel Plans

Thinking about your leisure travel plans in the next six months, which of the following activities are you planning to do on your next upcoming trip?



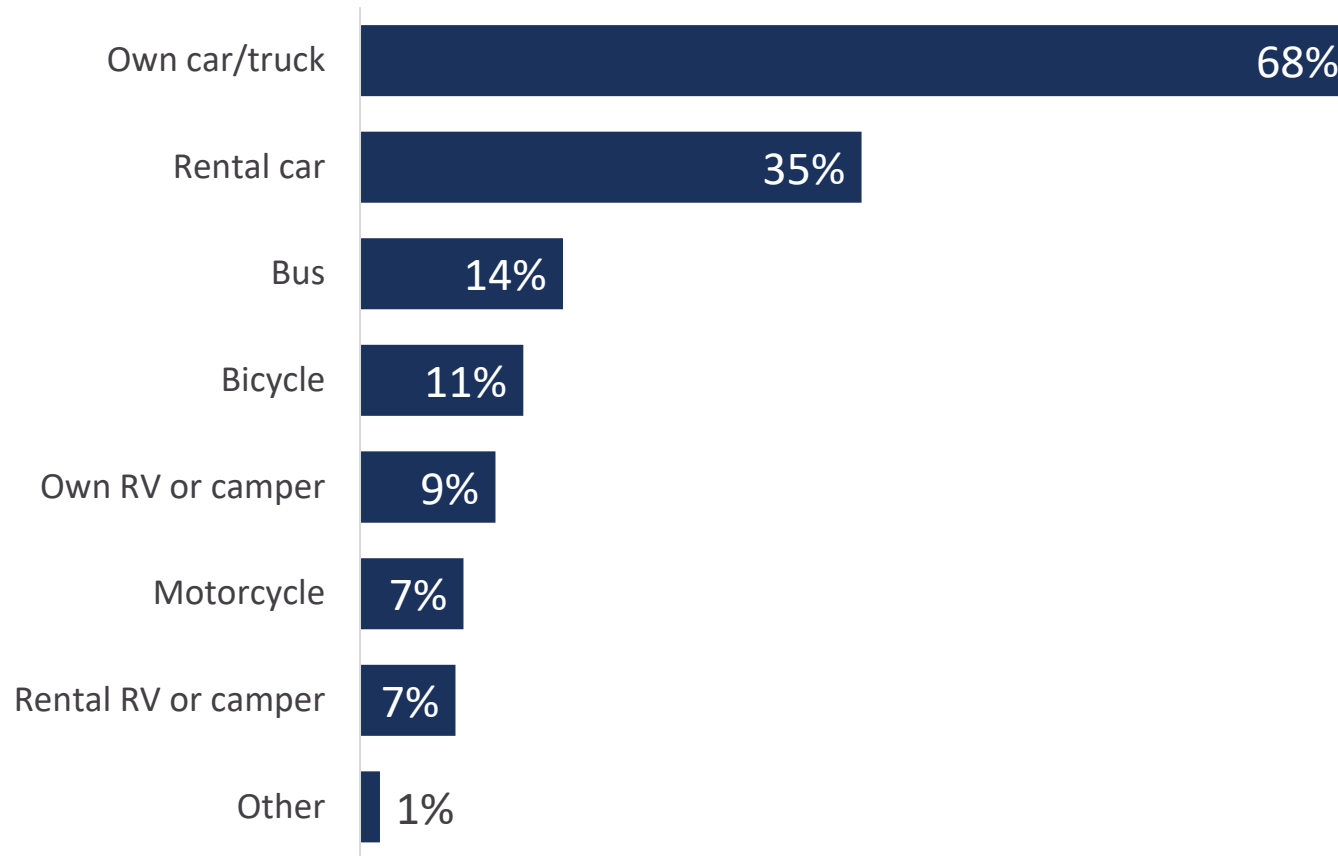
Half of Travelers Have Spent At Least One Night Following a Touring Route

In the last 5 years, have you spent at least one night following a touring route or scenic/historic highway in the USA such as Route 66, the Pacific Coast Highway, Blue Ridge Parkway or any other Scenic Byway?



Personal Vehicle Top Transportation Method for Touring Routes

What types of transportation did you use while traveling along touring routes or scenic/historic highways?

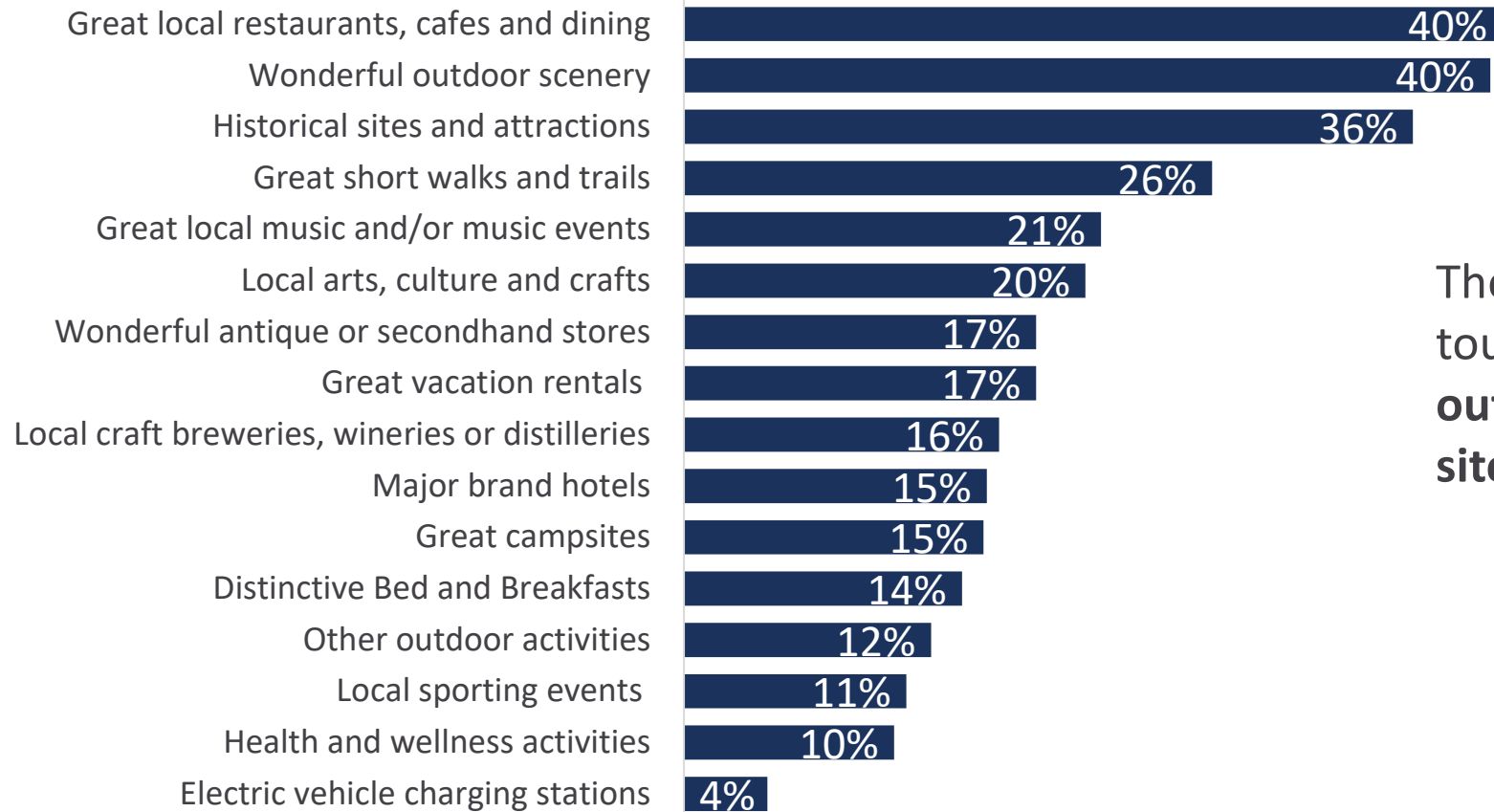


Personal vehicle (68%) overwhelmingly came out on top as travelers' mode of transportation on touring routes.

High Interest in Dining, Outdoor Scenery, and Historical Sites/Attractions on Touring Routes

Thinking of touring routes or scenic/historic highways specifically, what attractions, activities, and services along the route would be of most interest to you or your traveling companions?

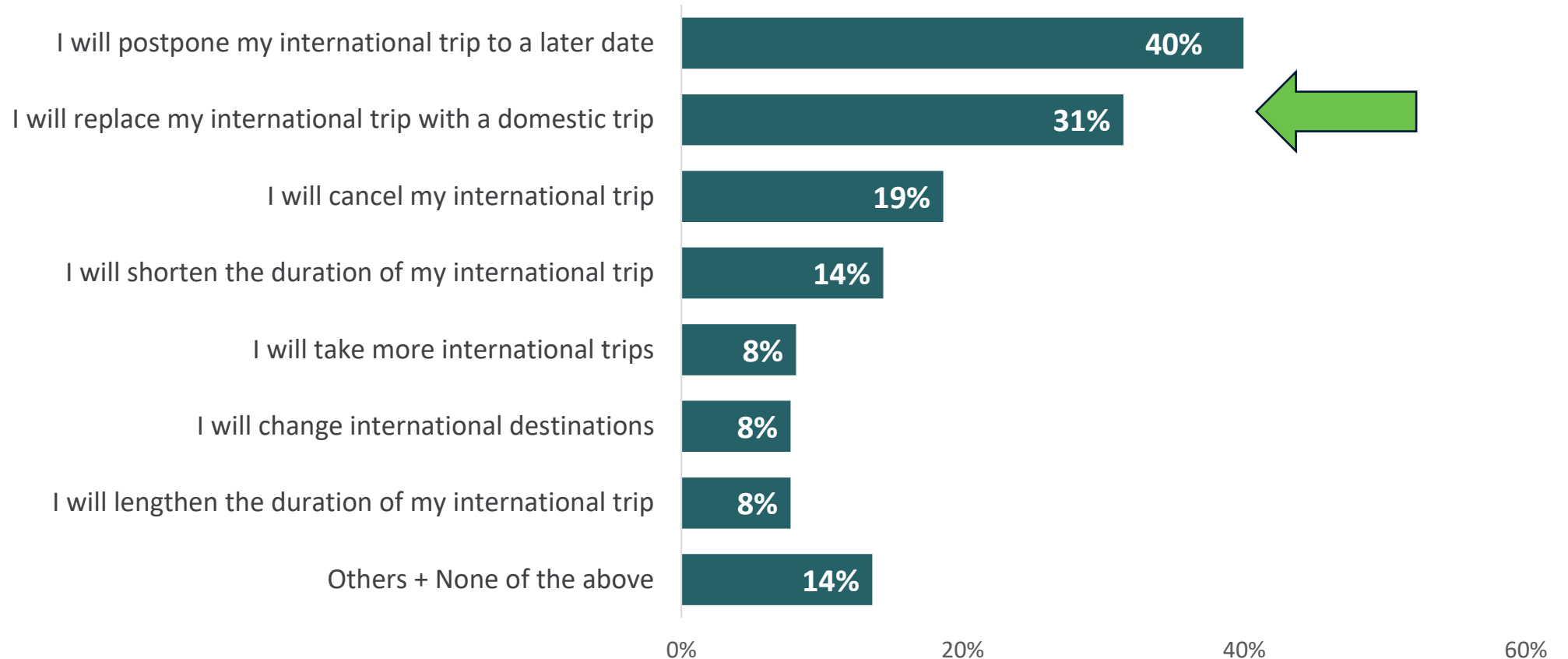
Note: Respondents were asked to select up to four attractions, activities, or services



The top three interests on touring routes are **dining, outdoor scenery, and historical sites/attractions.**

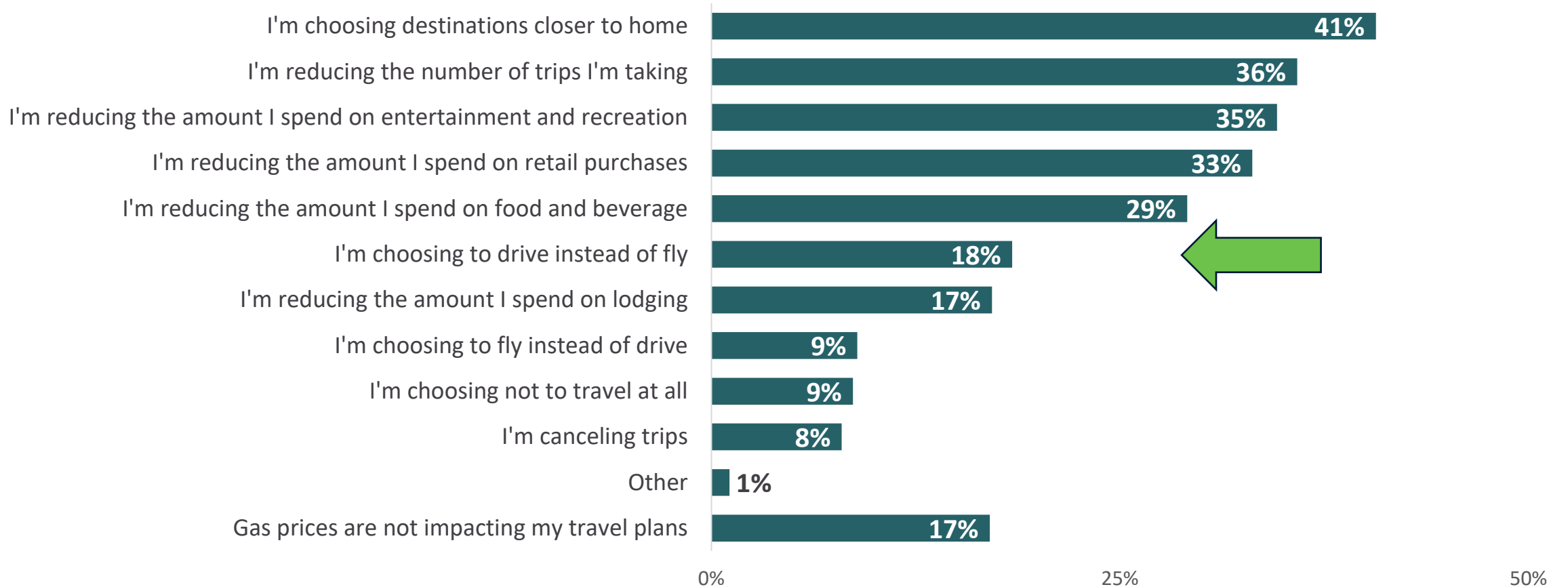
Domestic Travel Opportunity!

You indicated that the Iran war is influencing your international travel plans. How will you change your international travel plans in the next 12 months?



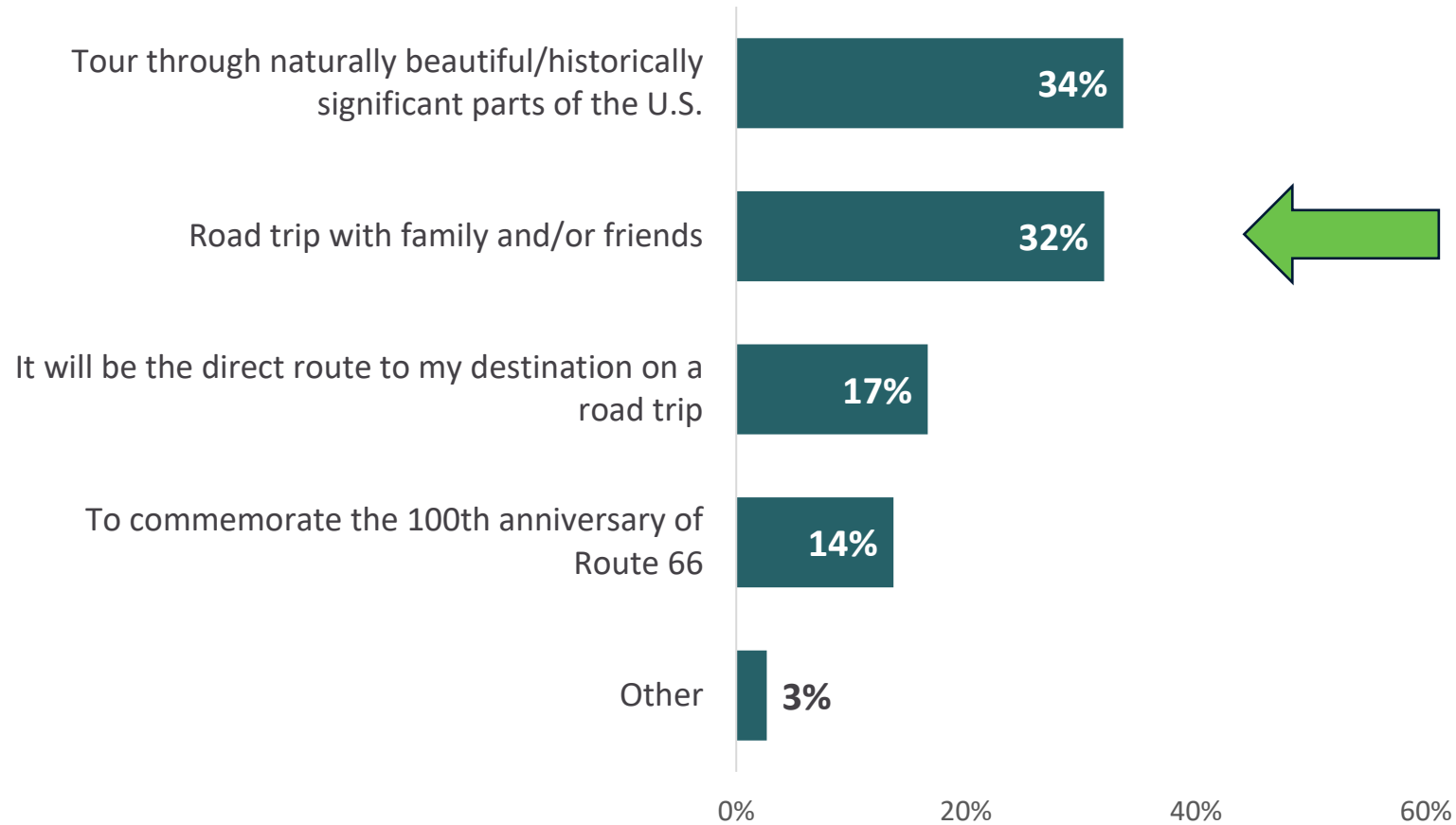
18% Are Choosing to Drive Instead of Fly!

During the next six months, how are gas prices impacting your travel plans?



Touring and Road Trips are Top Reasons for Traveling Along Route 66

What is the primary reason for your intended travel along Route 66?



All The Above Points To:

- More “Togetherring”
- More “VFR” (New & Improved!)
- More Opportunity for Domestic Conversion

So What?!

Double Down on your Regional Drive Markets!



So What?!

Question to Ponder...

Are you aggressive enough with your regional drive market budget/strategy?



Audience Question!

Has anyone become more aggressive in their regional drive market strategy?



Looking Ahead...

Road Trips & Electric Vehicles...

GermainCars

ELECTRIC VEHICLE
ROAD TRIPS



Electric Vehicle Travel

Fresh research & insights on electric vehicle road trips and travel by U.S. travelers



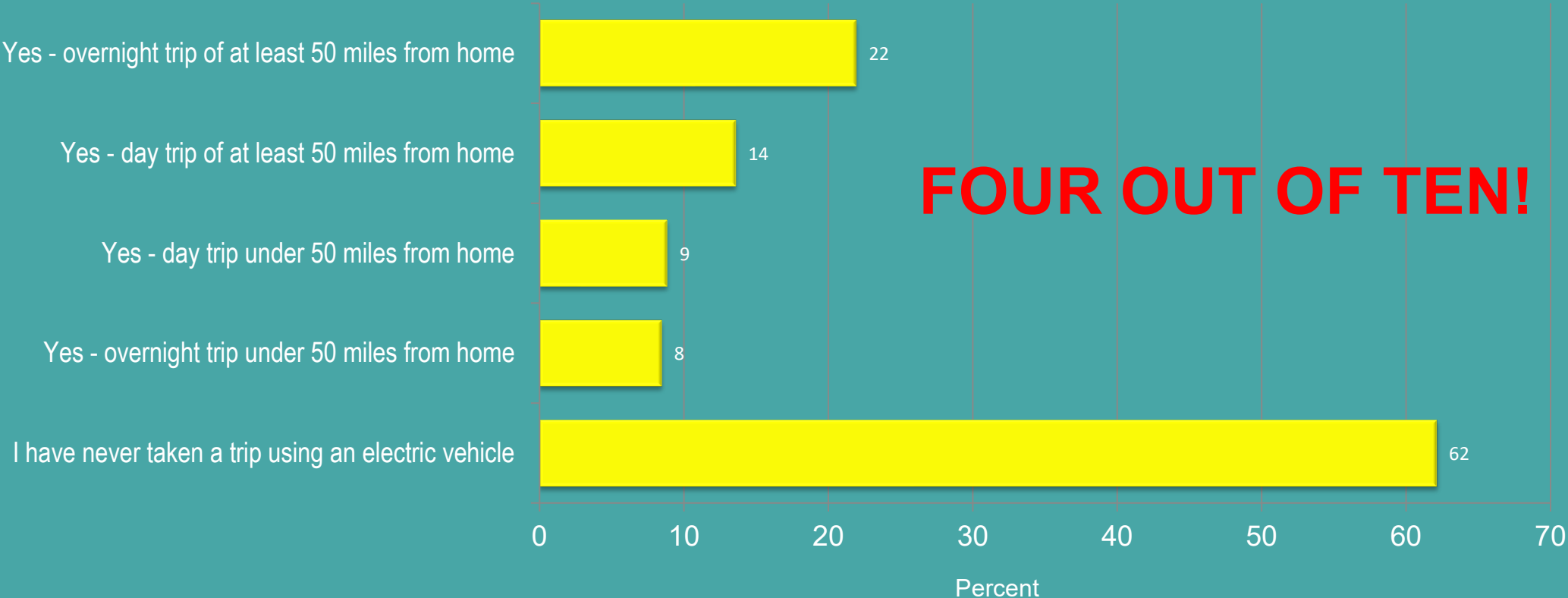
miles
PARTNERSHIP

Longwoods
INTERNATIONAL

Have you ever used an electric vehicle to travel on a trip?



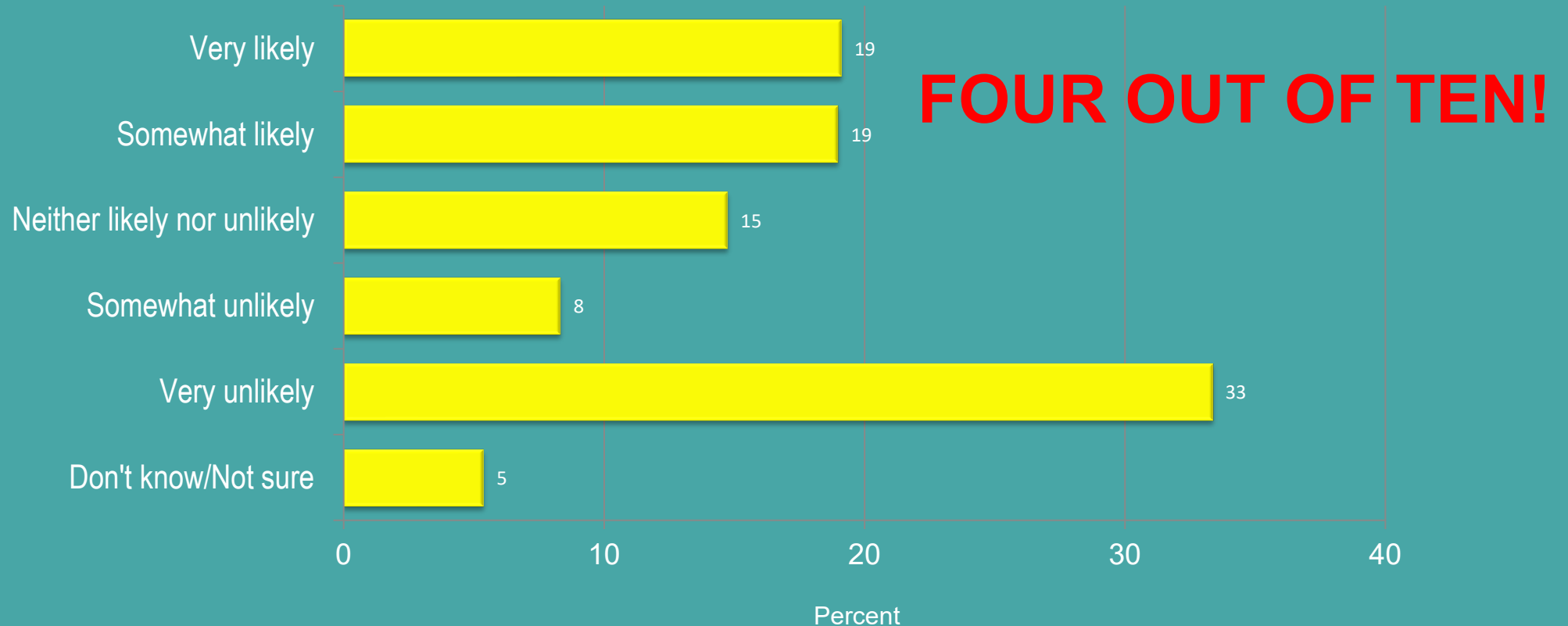
Base: Travelers



Source: Custom Survey on EV Travel June 2024

On your next trip, how likely are you to use an EV?

Base: Travelers



Source: Custom Survey on EV Travel June 2024

Key Question...

Is your business or organization EV-Ready?

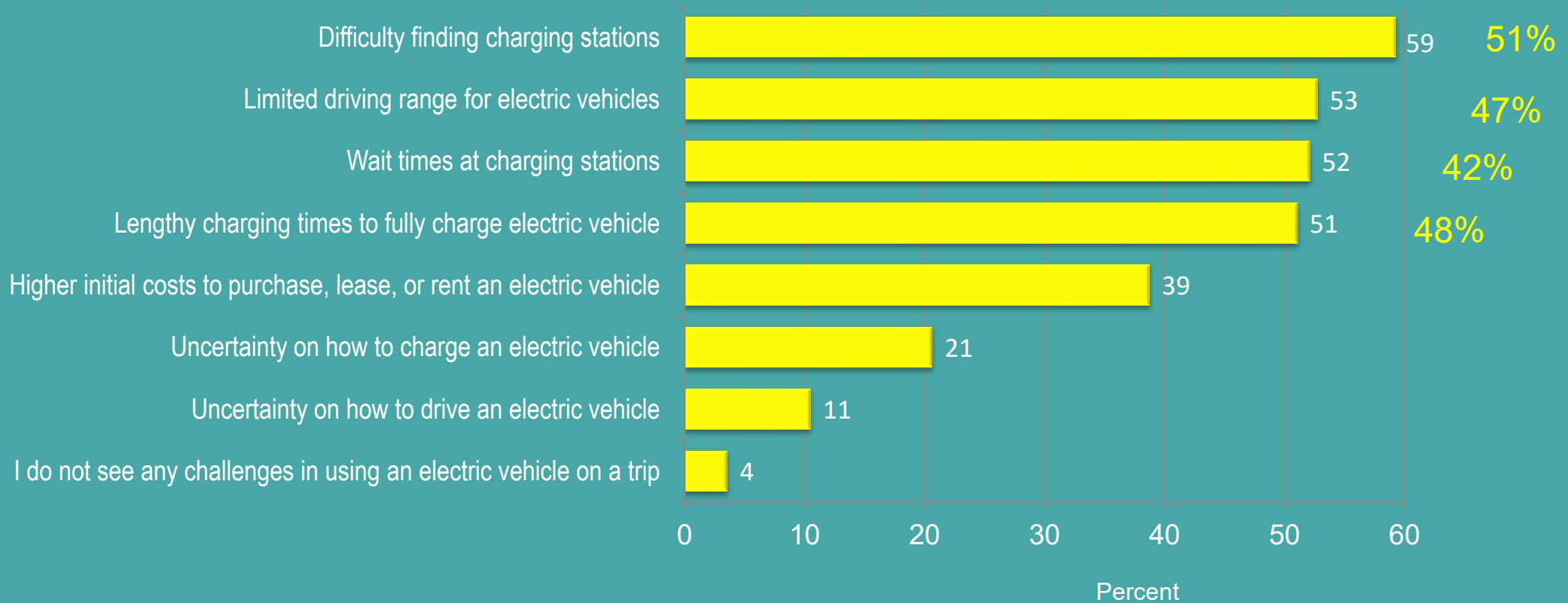


In your opinion, which of the following are the primary challenges of using an electric vehicle on a trip?



Base: Travelers

July 2023 Survey Results



Source: Custom Survey on EV Travel June 2024



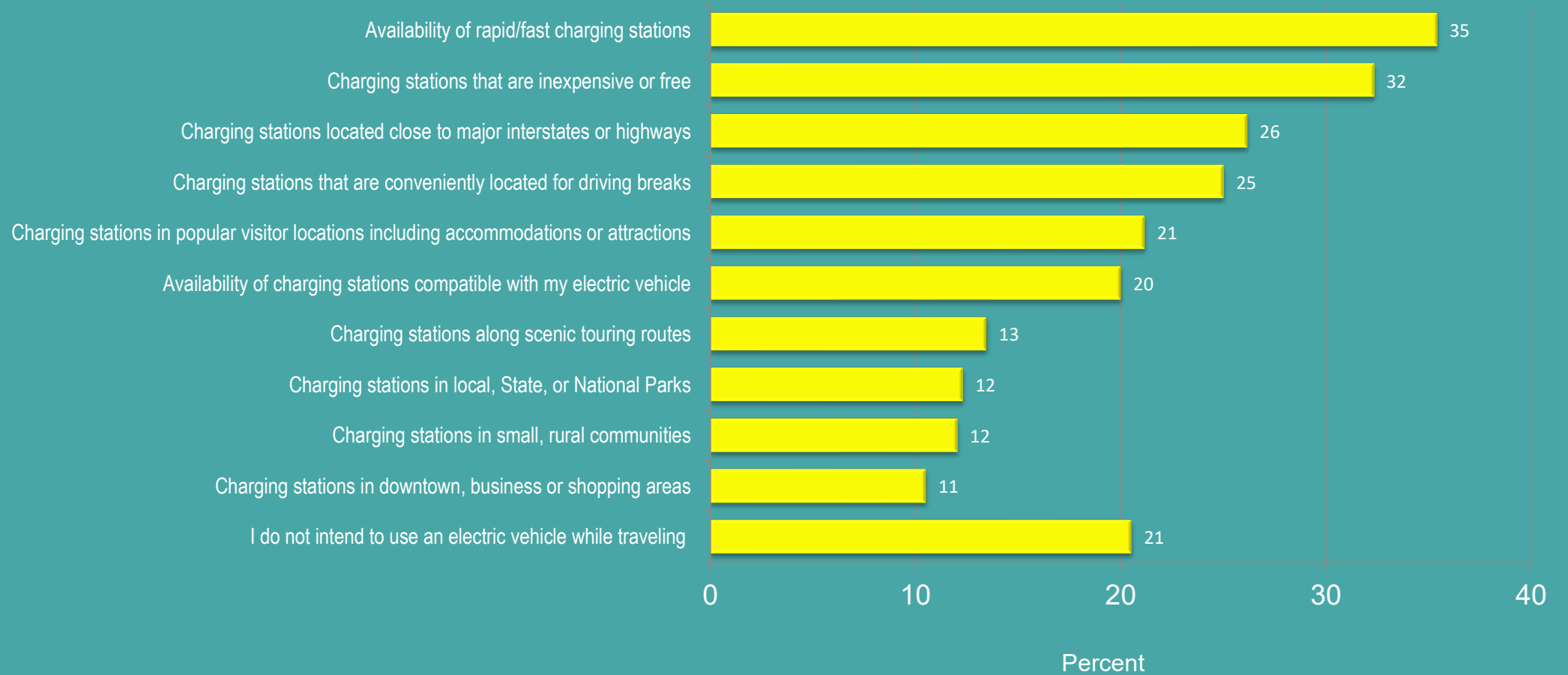
So What?!

**Infrastructure will be a competitive advantage!
Market it...**



Which of the following amenities or services would make you more likely to visit a destination in an electric vehicle?

Base: Travelers



Source: Custom Survey on EV Travel June 2024

Audience Question!

Anyone actively marketing your destination's EV infrastructure in some of your messaging?



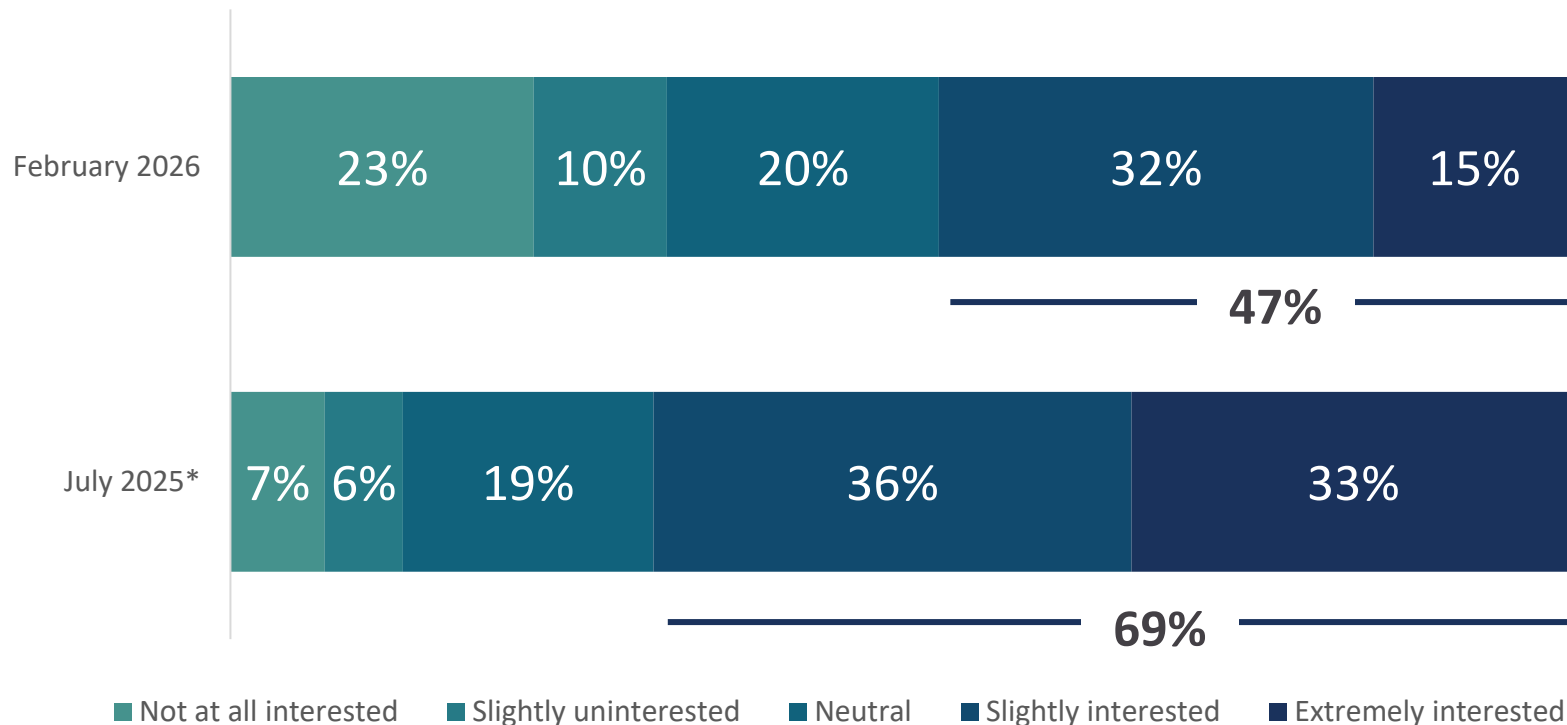
Key Learning...

Mega-Events Are Generating Demand/Opportunity!
The Rise of “Gig Tourism!”



Nearly Half of Travelers are Interested in Touring Route 66

Route 66 is celebrating its 100th year anniversary in 2026. How interested are you in touring part or all of Route 66 within the next 12 months?

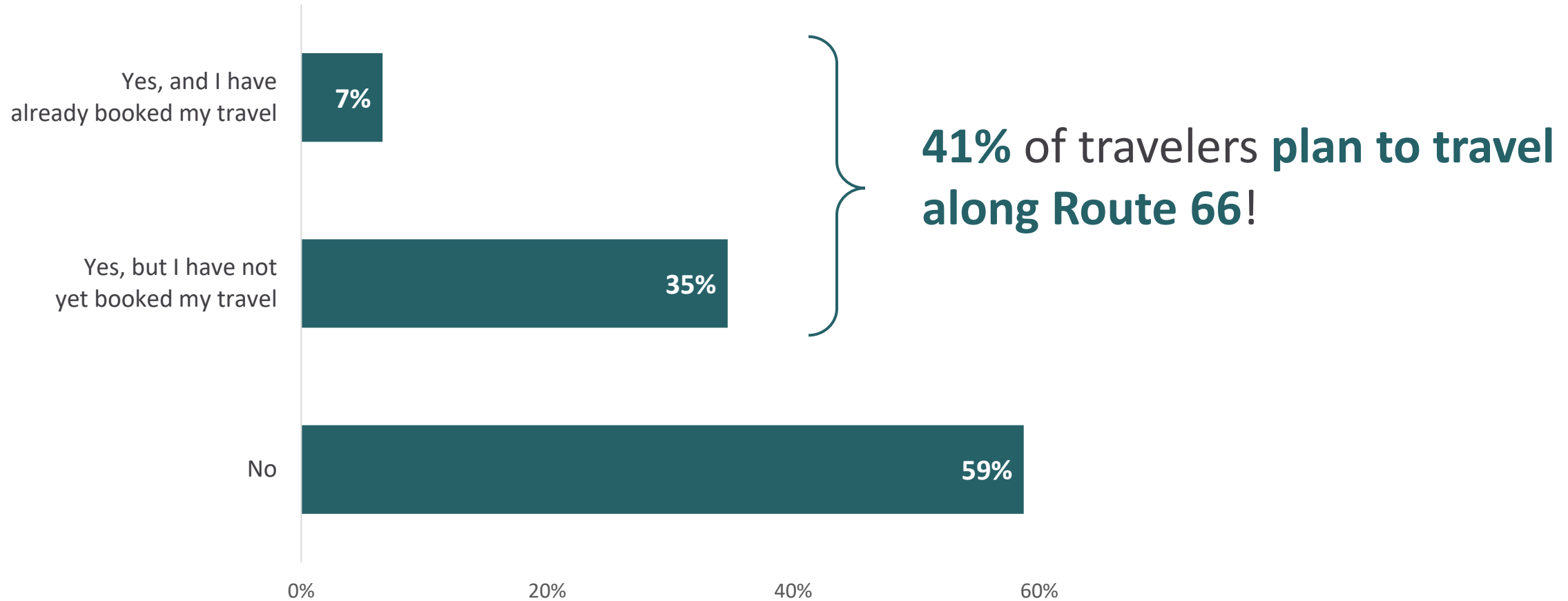


47% of travelers are either extremely or slightly interested in touring part or all of Route 66 in the next 12 months.

While interest remains high, **it is down 21.2 points vs July 2025**, in which travelers were asked about their interest in touring Route 66 within the next 2 years. This drop can mainly be attributed to a decrease in those **extremely interested**, which is down 18.0 points vs July 2025.

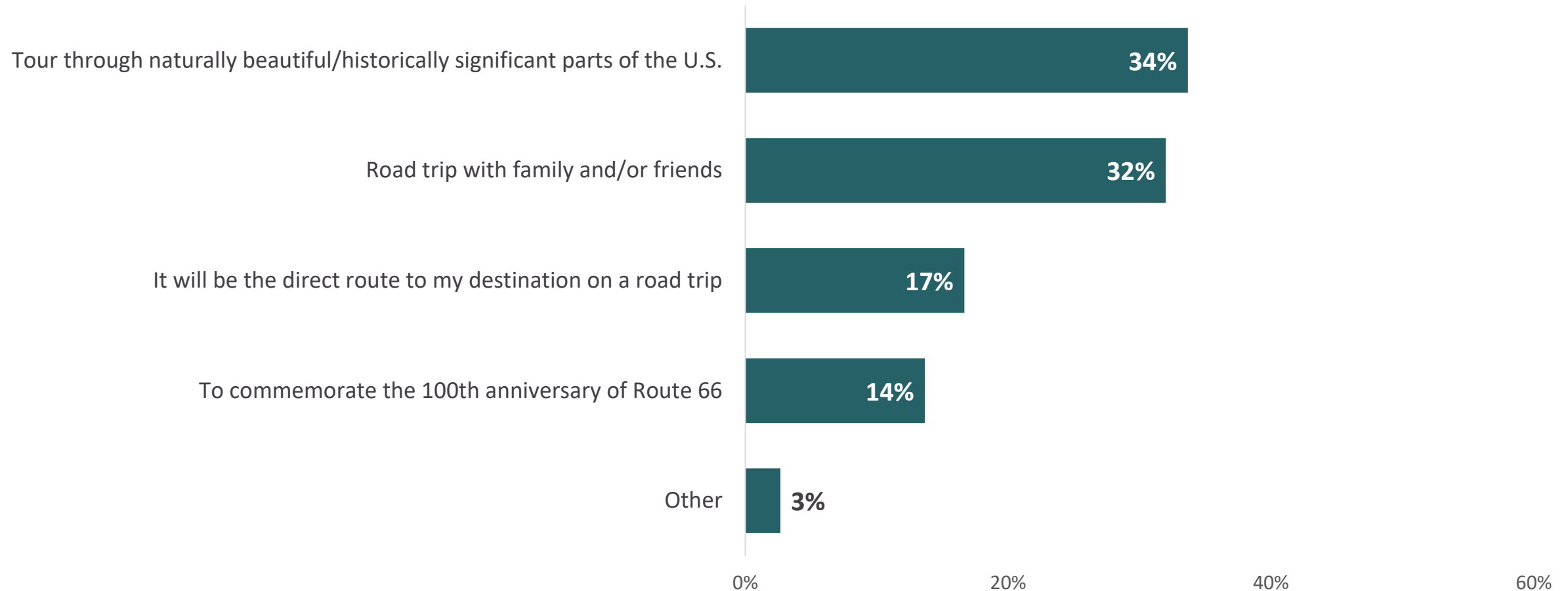
41% of Travelers Plan to Travel Along Route 66

Within the next 12 months, do you plan to travel along Route 66?



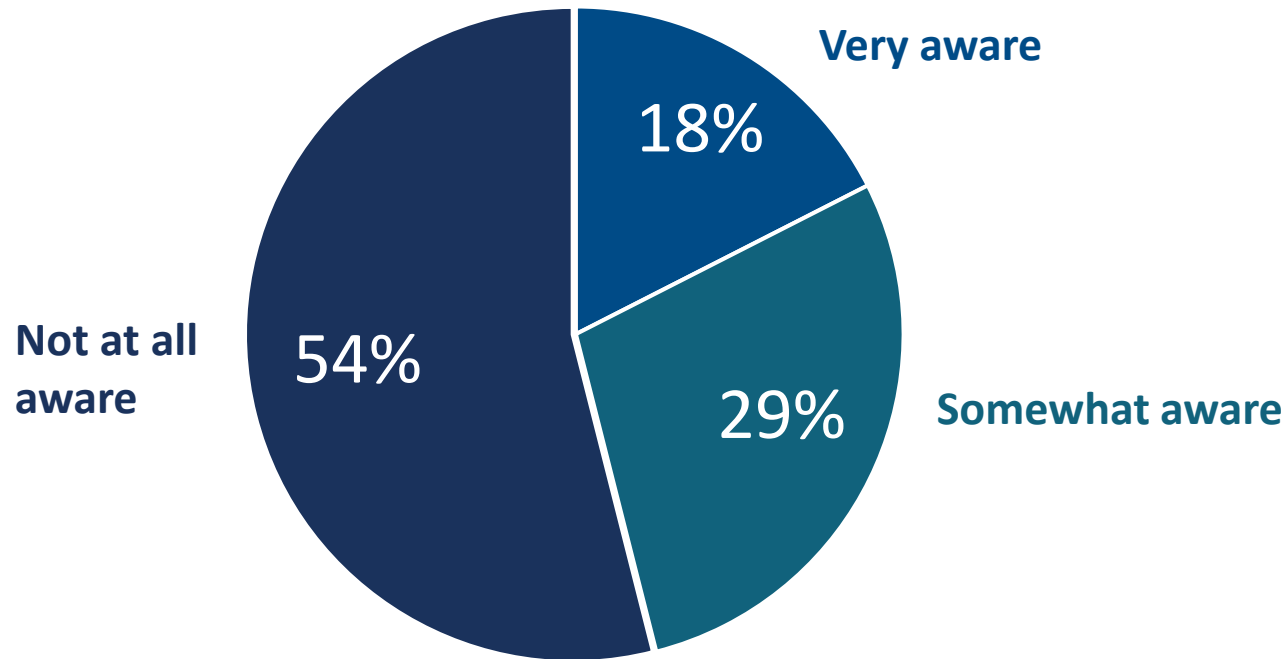
Touring and Road Trips are Top Reasons for Traveling Along Route 66

What is the primary reason for your intended travel along Route 66?



Nearly Half of Travelers are Aware of America 250

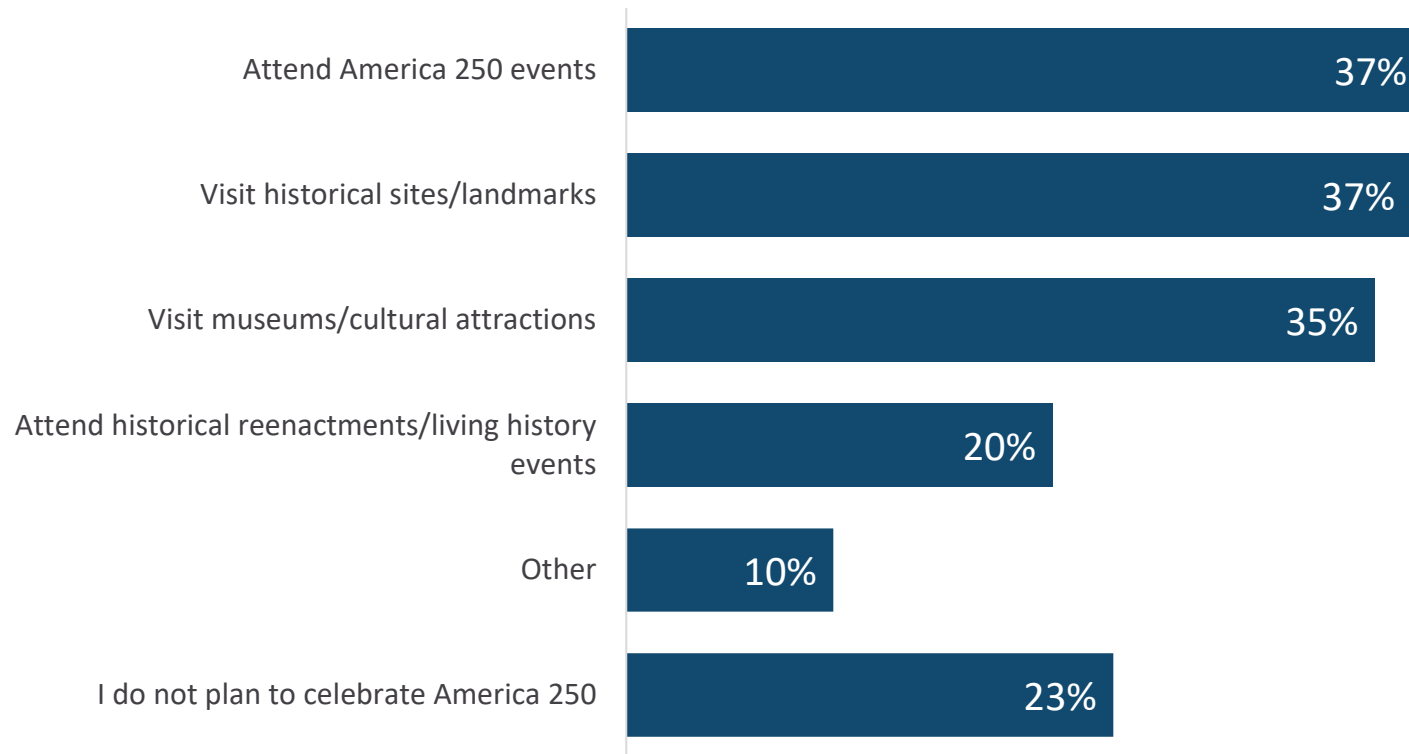
Please indicate your level of awareness of America 250.



Nearly half (46%) of travelers are **somewhat or very aware** of America 250.

Travelers' Plans to Celebrate America 250

How do you plan to celebrate America 250?

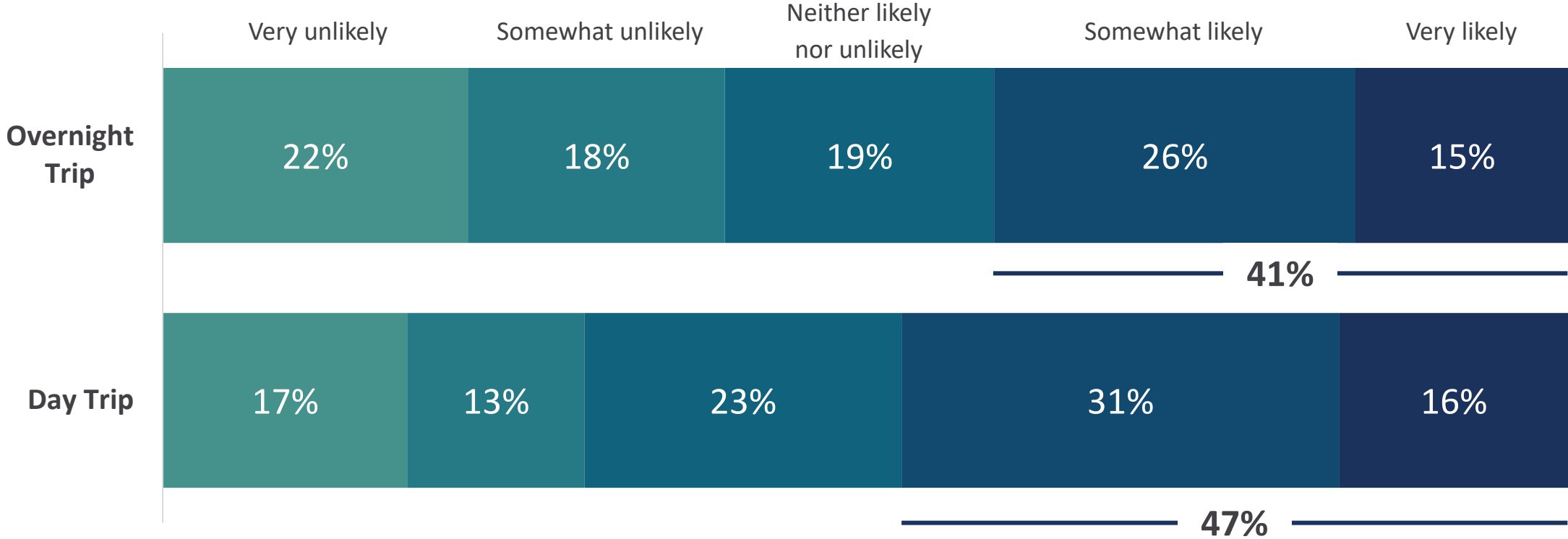


Base: Travelers somewhat/very aware of America 250

Travelers plan to celebrate America 250 primarily by **attending America 250 events (37%)**, **visiting historical sites/landmarks (37%)** and **visiting museums/cultural attractions (35%)**.

Interest in Traveling for America 250 Among Those Aware of America 250

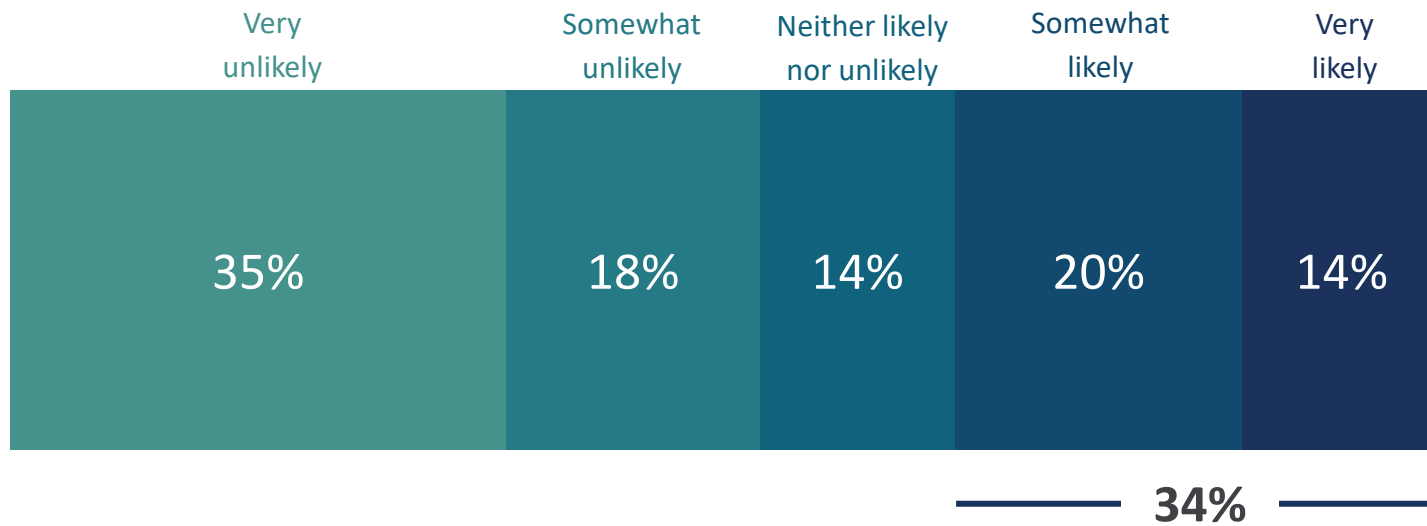
How likely are you to take a trip for the purpose of celebrating America 250?



Source: Longwoods International ATS Wave 105
Percentages are based only on respondents who are confirmed travelers and are somewhat/very aware of America 250

A Third of Travelers Likely to Attend Special Sporting Events

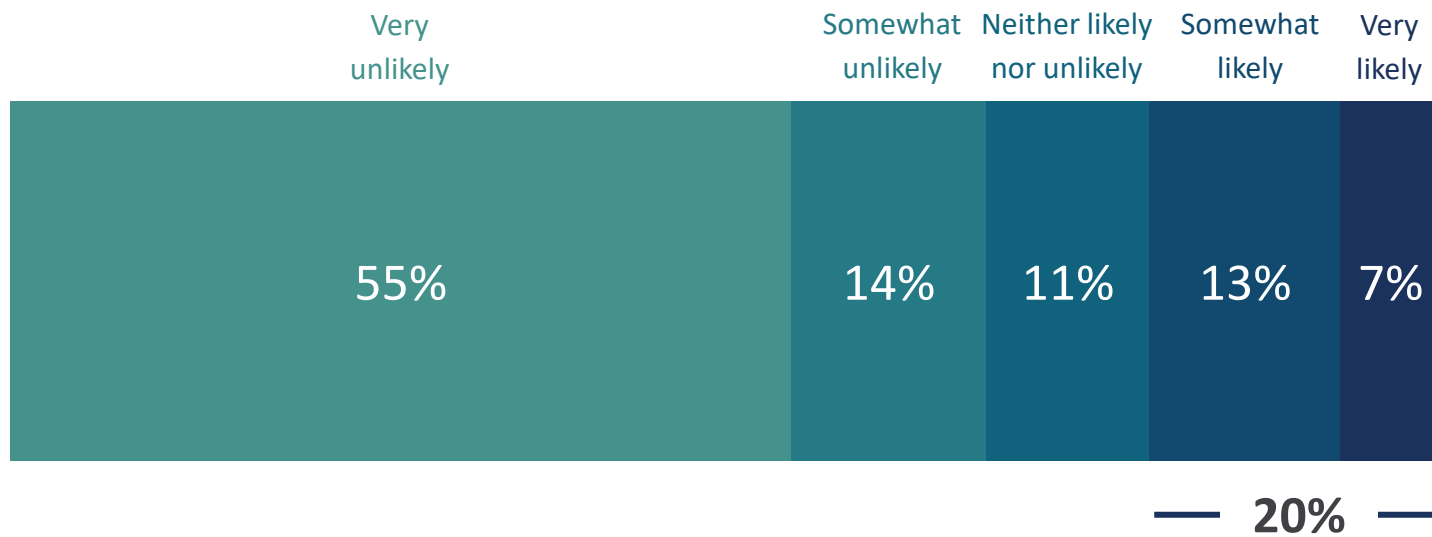
Within the next 12 months, how likely are you to travel overnight to attend special sporting events, such as professional or college sporting events or international competitions taking place in the U.S.?



A third (34%) of travelers say they **are likely to travel overnight to attend special sporting events!**

20% of Travelers Somewhat or Very Likely to Attend a World Cup Match

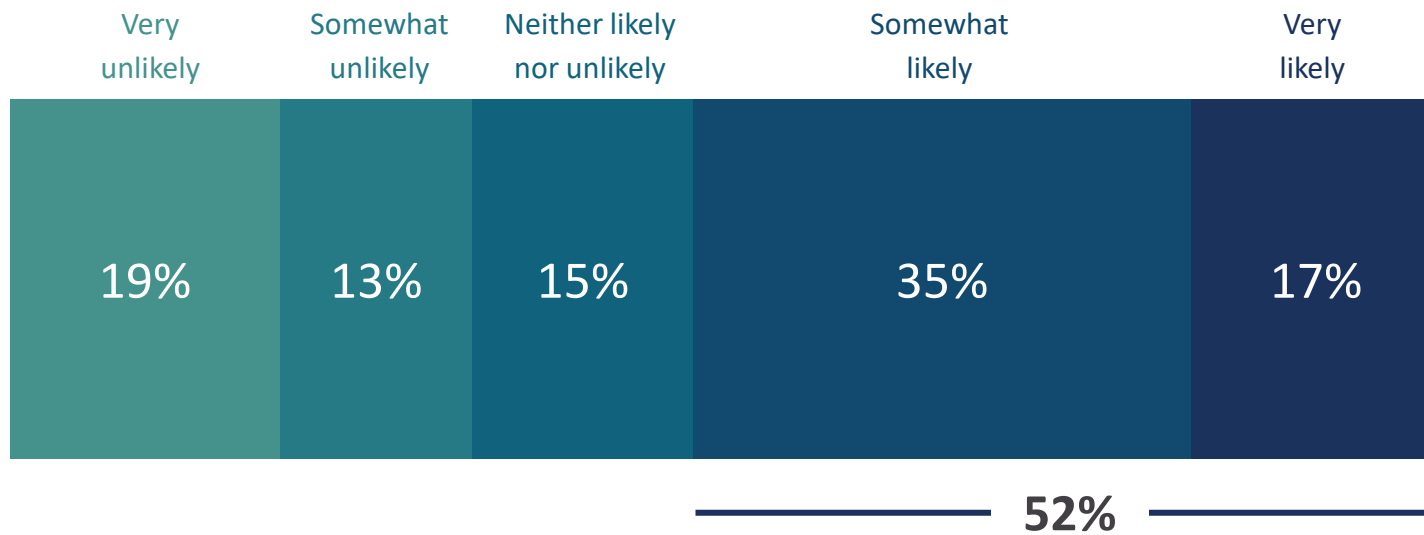
How likely are you to attend a FIFA World Cup match in the United States this summer?



20% say they are **very or somewhat likely to attend a World Cup match** this summer.

Half of Travelers Likely to Attend Special Cultural or Entertainment Events

Within the next 12 months, how likely are you to travel overnight to attend special cultural or entertainment events, such as concerts/music festivals or local cultural festivals?



Half of travelers (52%) say they are **likely to travel overnight to attend special cultural or entertainment events** in the next 12 months!

So What?!

Can you leverage and localize Mega Events, even if they are not in your destination?



SWIFTIE NIGHT OUT

A TAYLOR-THEMED
NEW ORLEANS
BAR CRAWL



Audience Question!

**How are you leveraging and localizing
upcoming Mega Events?**



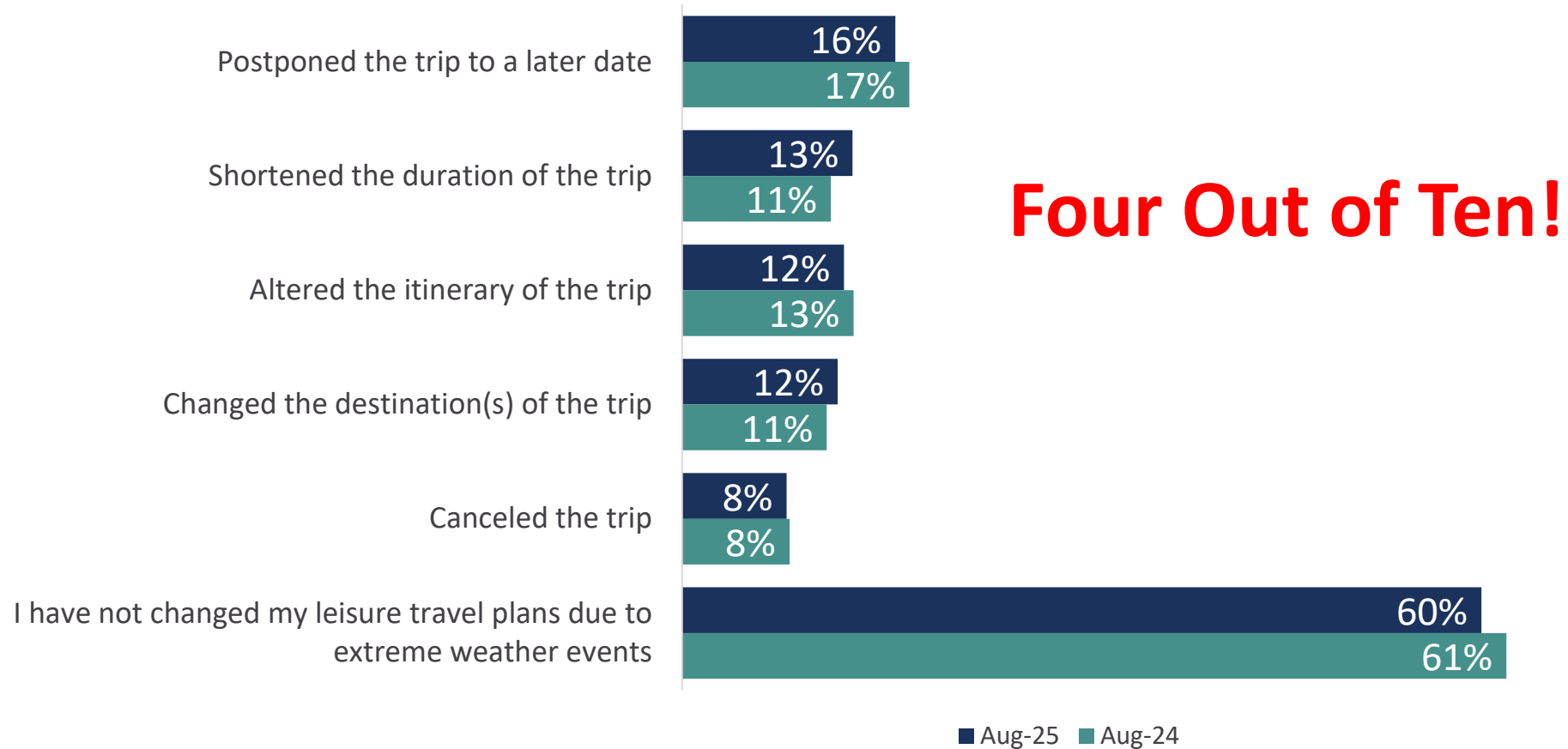
Key Learning...

Can We Talk About the Weather?



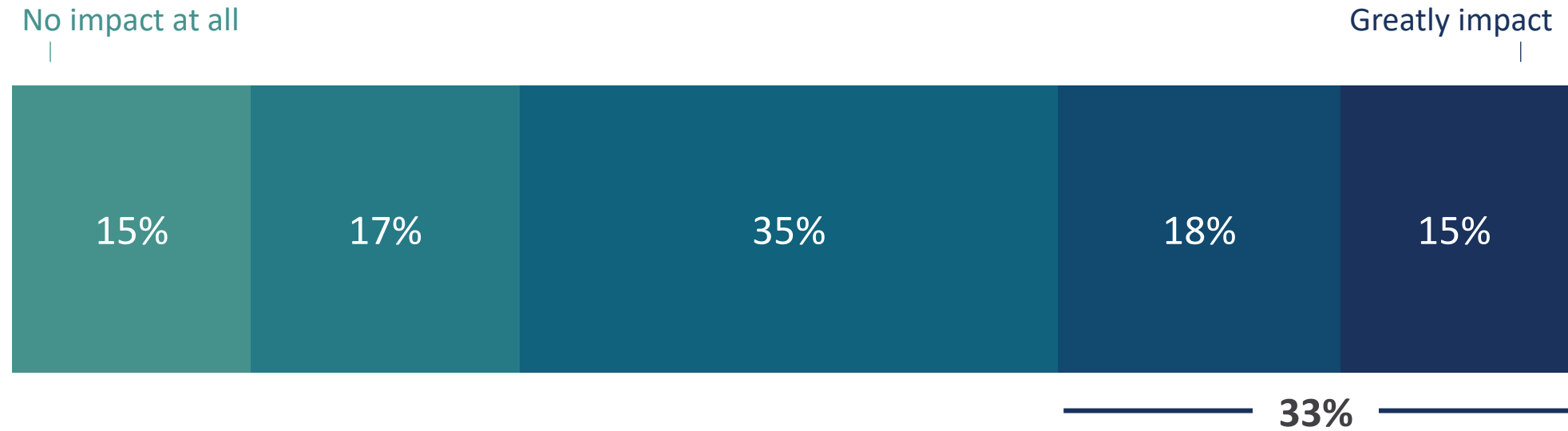
Changes to Leisure Travel Plans Due to Extreme Weather Events Remain Consistent Since 2024

In the past year, have you changed your leisure travel plans due to extreme weather events, such as extreme heat, drought, flooding, hurricanes, etc.?



Likelihood of Extreme Weather Events at a Destination Will Impact a Third of Travelers' Decisions to Travel There

Thinking about your leisure travel plans in the next 12 months, to what extent does the likelihood of extreme weather events at a destination impact your decision to travel there?



One Third!

So What?!

Will the Growing Frequency of Extreme Weather Events Create New Travel Patterns?



So What?!

Question to Ponder...

Should you adjust your marketing strategy
“proactively” as a result of weather/climate
change?



Audience Question!

Is anyone shifting their marketing strategy
“proactively” in anticipation of
weather/climate change patterns?



Key Learning...

The Politicization of Travel?



POLITICS MAY HAVE YOU FEELING LIKE THIS...



But they have an impact...

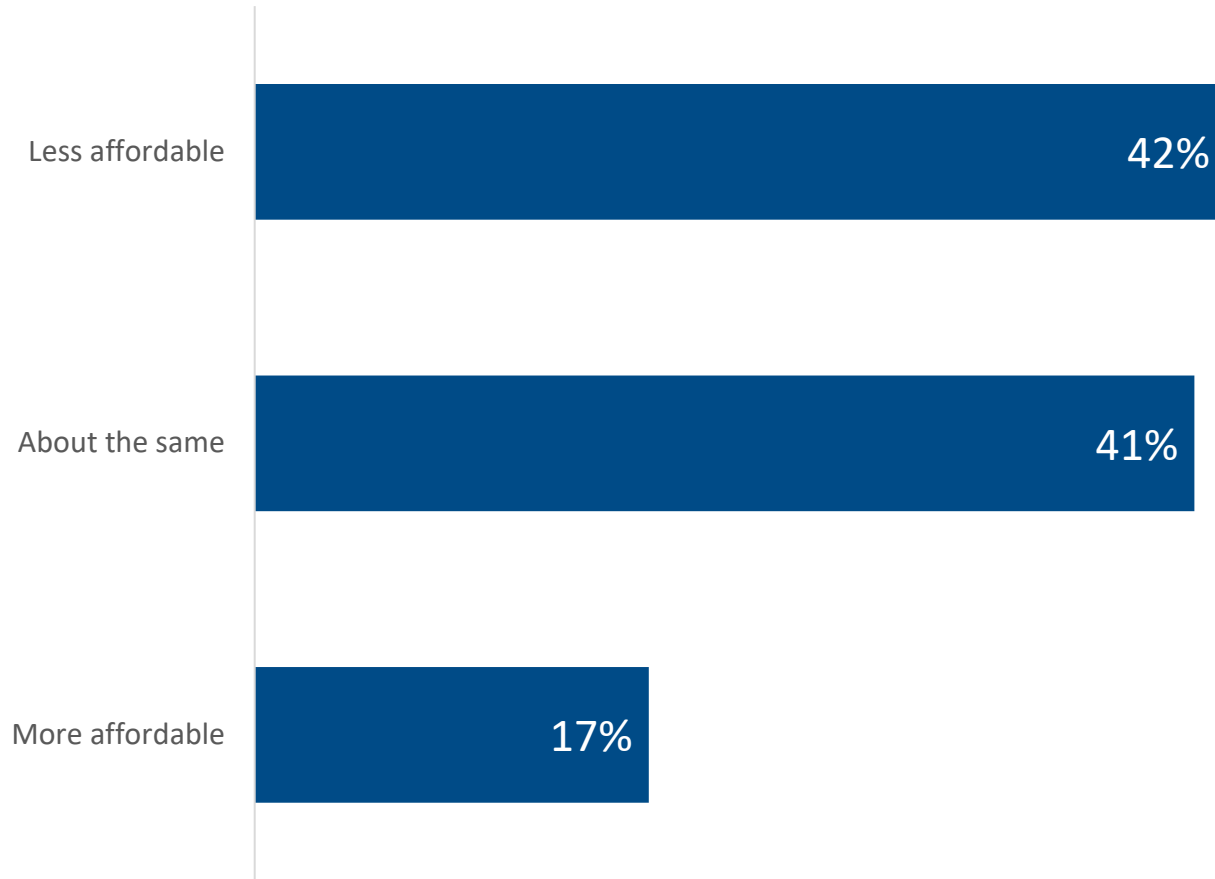


LITERALLY
ANYONE ELSE
★ 2024 ★



Travel Affordability Concerns: Most Expect Higher or Steady Costs

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

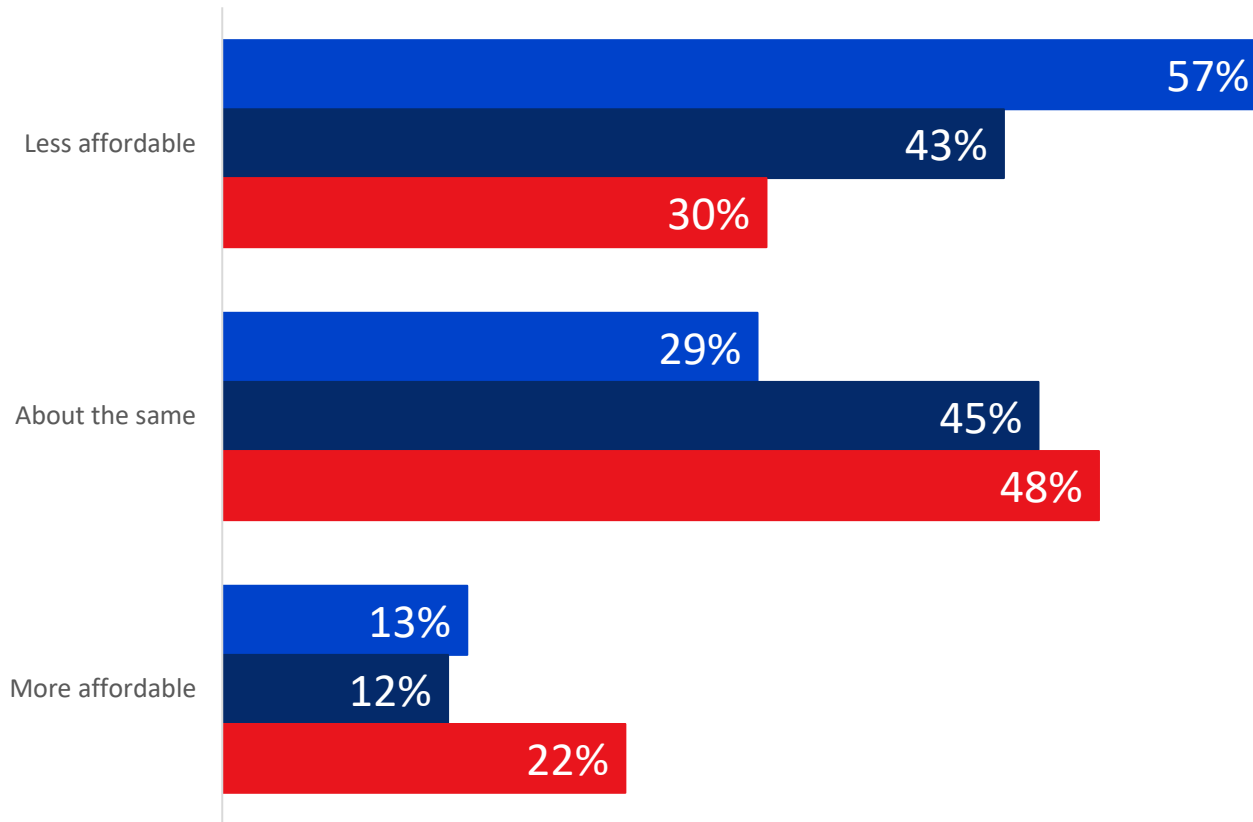


A majority of respondents (83%) expect travel costs to become less affordable or remain the same in the next year. This suggests growing concerns about personal finances, the economy, inflation, airfare, and accommodation prices impacting travel decisions.

Travel Cost Expectations Split Along Party Lines

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

■ Democrat ■ Independent ■ Republican

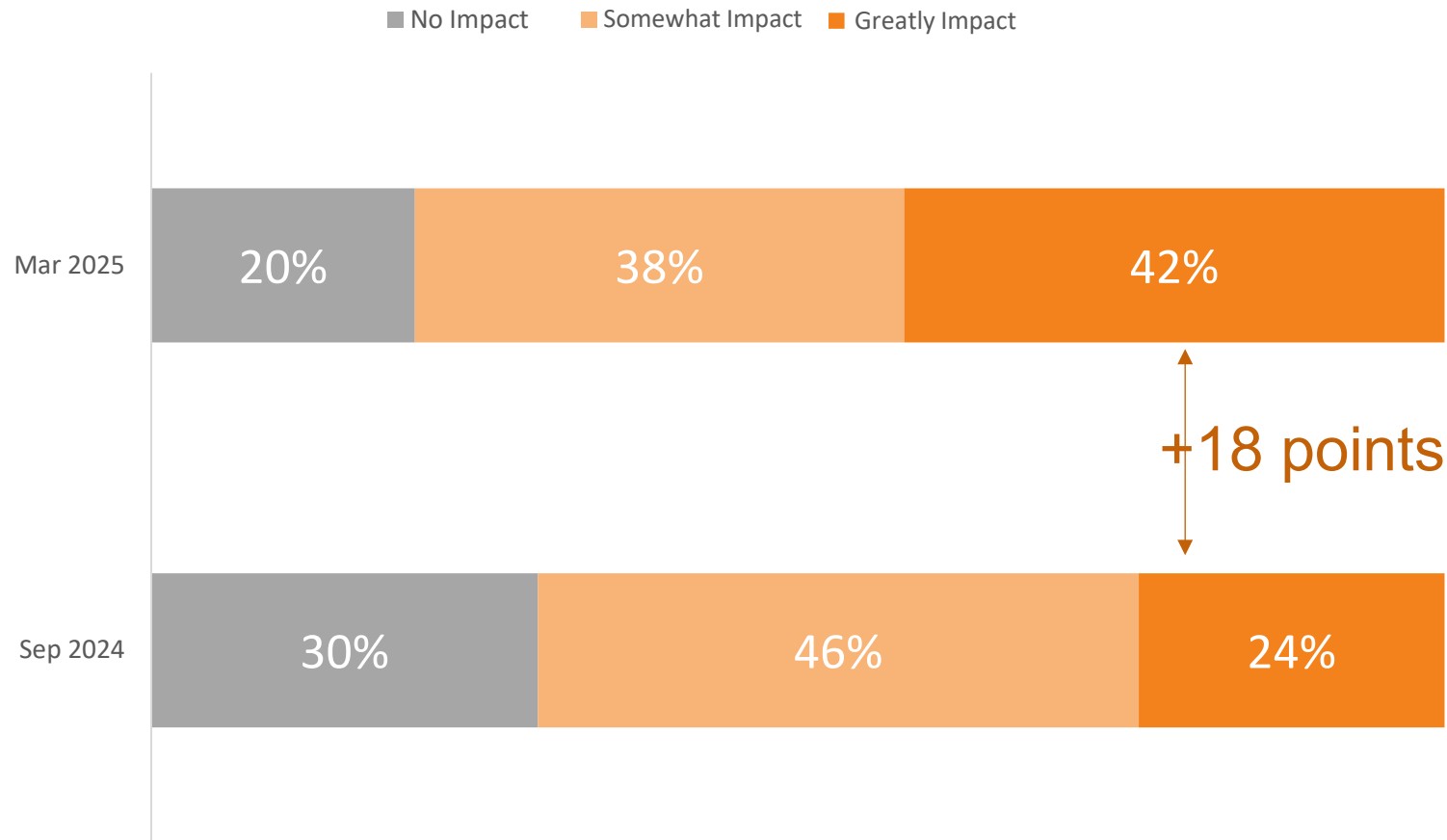


Perceptions of travel affordability vary by political affiliation. A majority of **Democrats** (57%) anticipate higher costs, while **Republicans** are the most optimistic, with 22% expecting travel to become more affordable.

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

Growing Influence of Politics on Travel Decisions

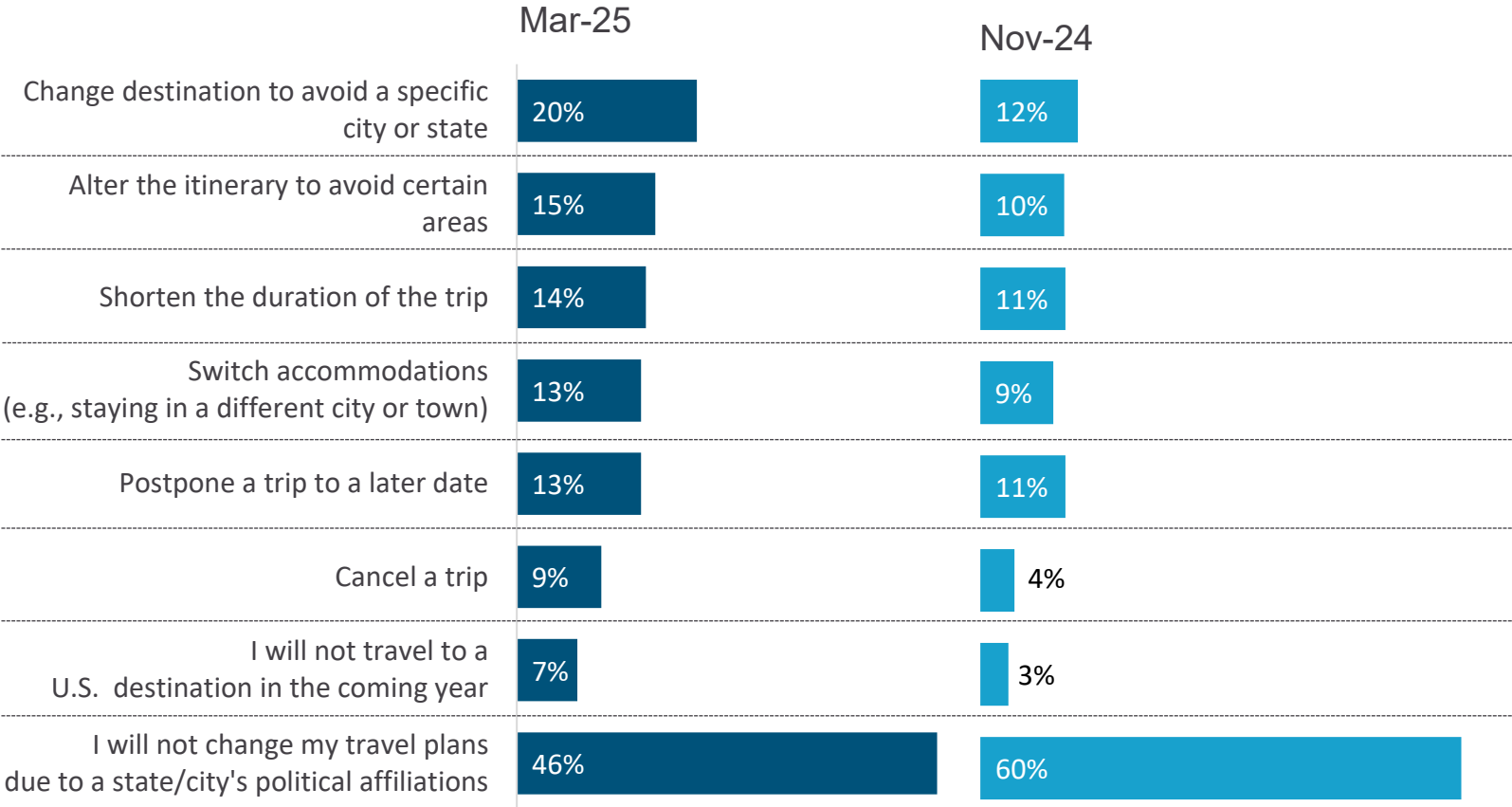
To what extent does the political climate of a destination influence your decision to visit?



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

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

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



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

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

So What?!

Question to Ponder...

Are there marketing opportunities here or do we avoid this topic all together?



Oh Canada!

And Did I Mention Canadian Travel Sentiment Towards the U.S. is Not That Great?





THE ROAD AHEAD

Canadian Travel Sentiment Study

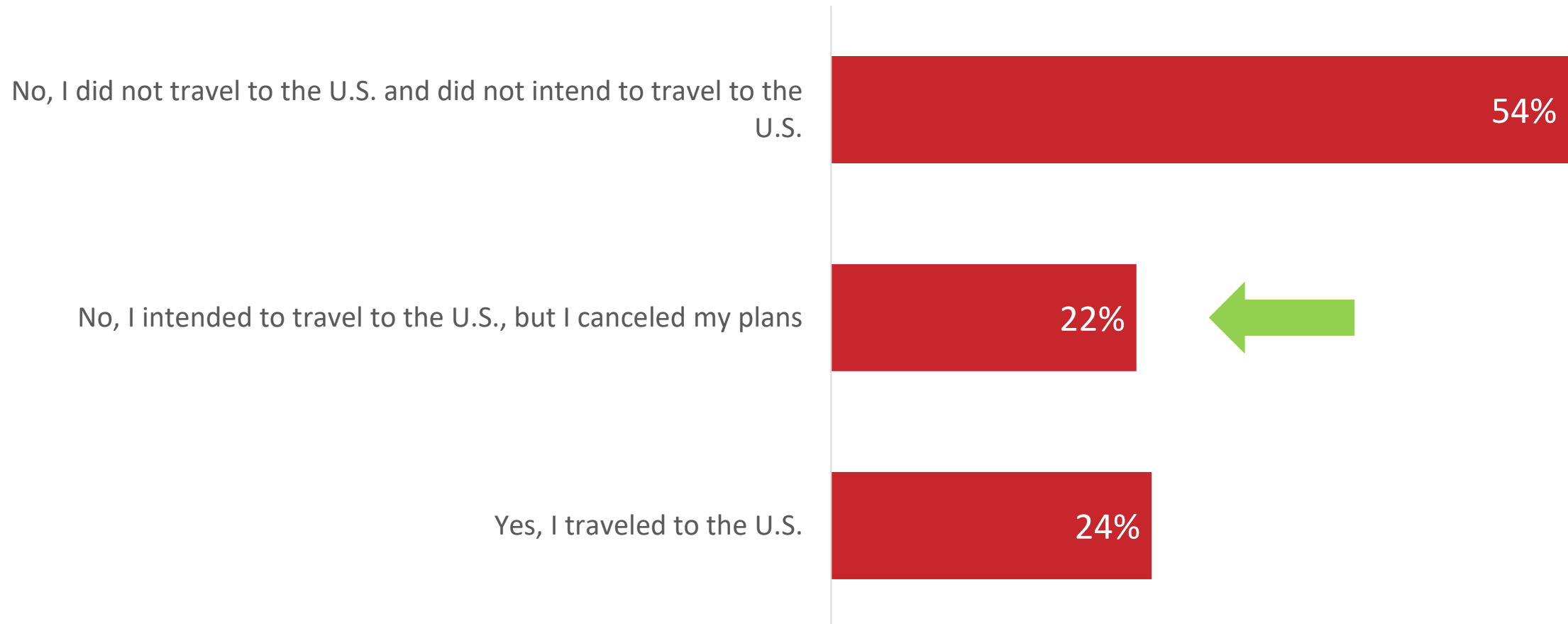
WAVE 5

APR 30, 2026

 Longwoods
INTERNATIONAL

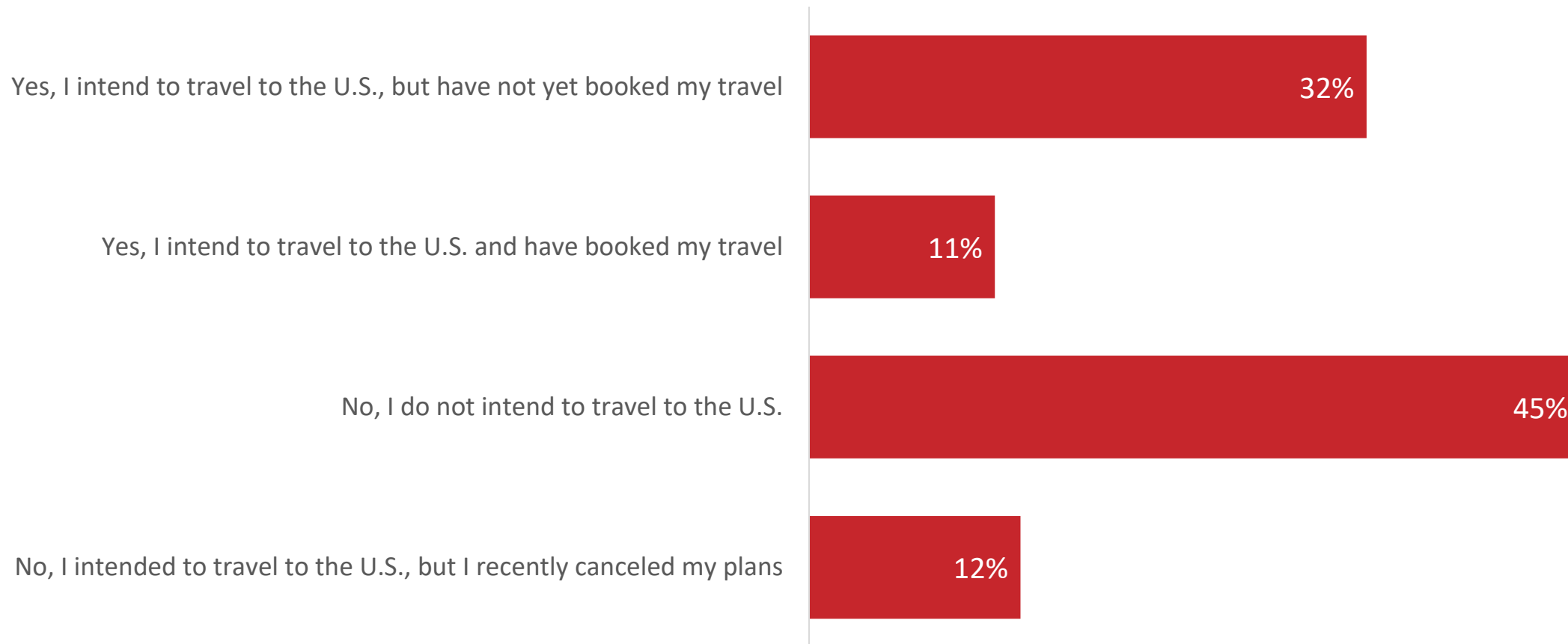
Recent U.S. Travel Activity: 1 in 5 Cancelled!

Did you travel to the U.S. in the last 6 months?



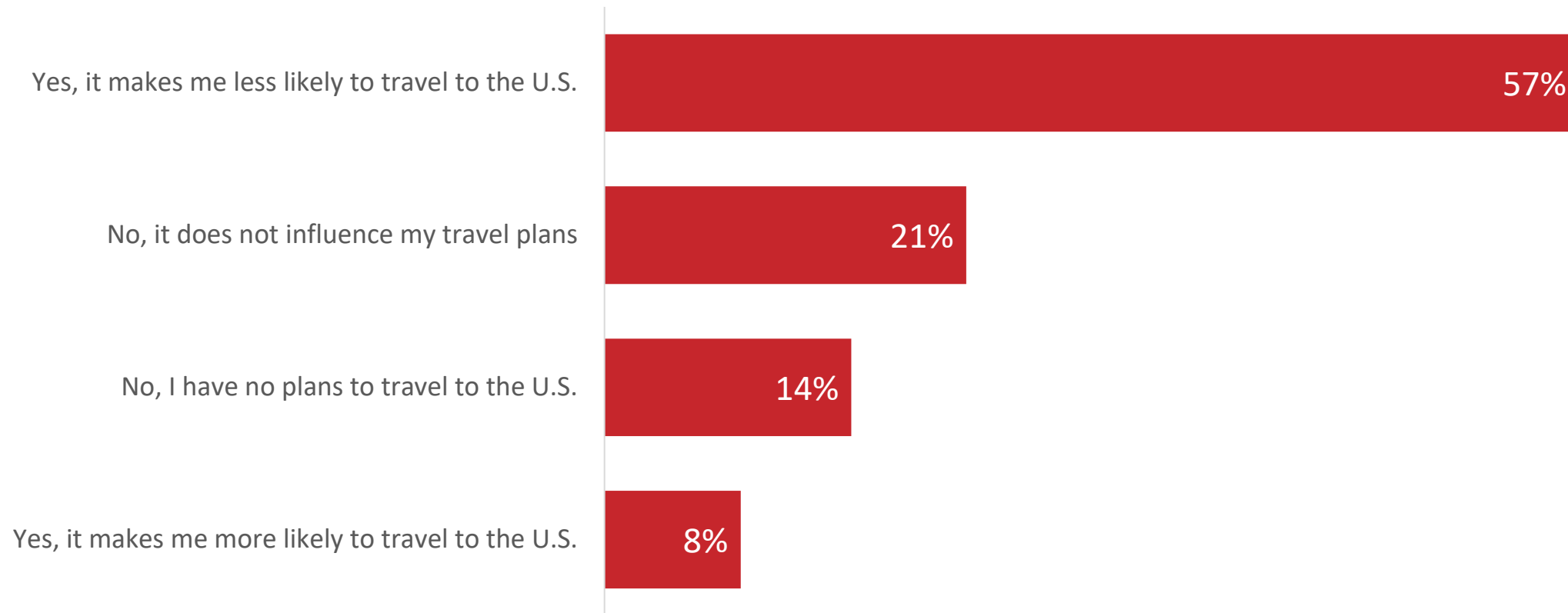
43% of Canadian Travelers Intend to Travel to the U.S. in Next 12 Months

In the next 12 months, do you intend to travel to the U.S.?



U.S. Policies and Politics Continue to Deter Canadian Travelers

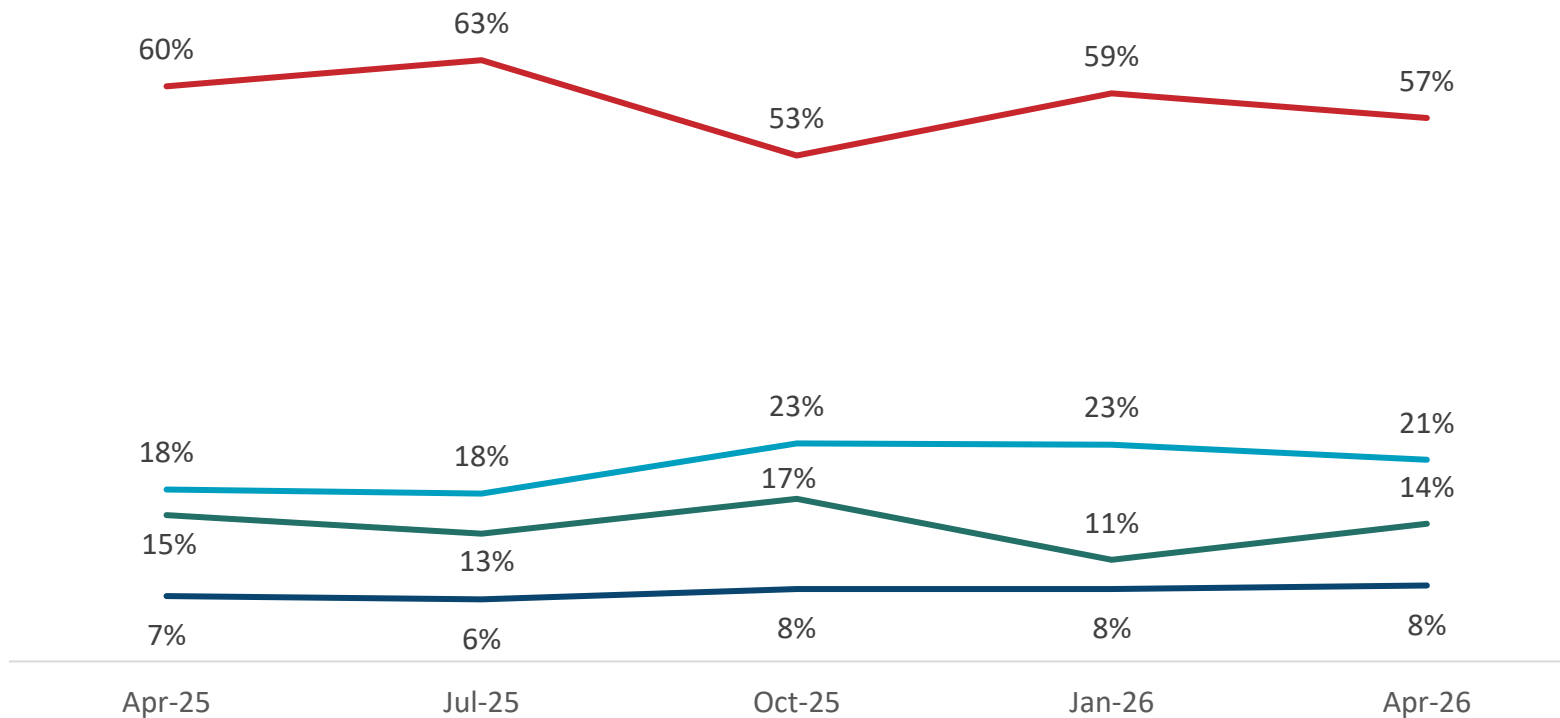
Are current U.S. Government policies, trade practices, and/or political statements influencing you to change your travel plans to the U.S. in the next 12 months?



Policy Deterrence Remains Strong Among Canadian Travelers

Are current U.S. Government policies, trade practices, and/or political statements influencing you to change your travel plans to the U.S. in the next 12 months?

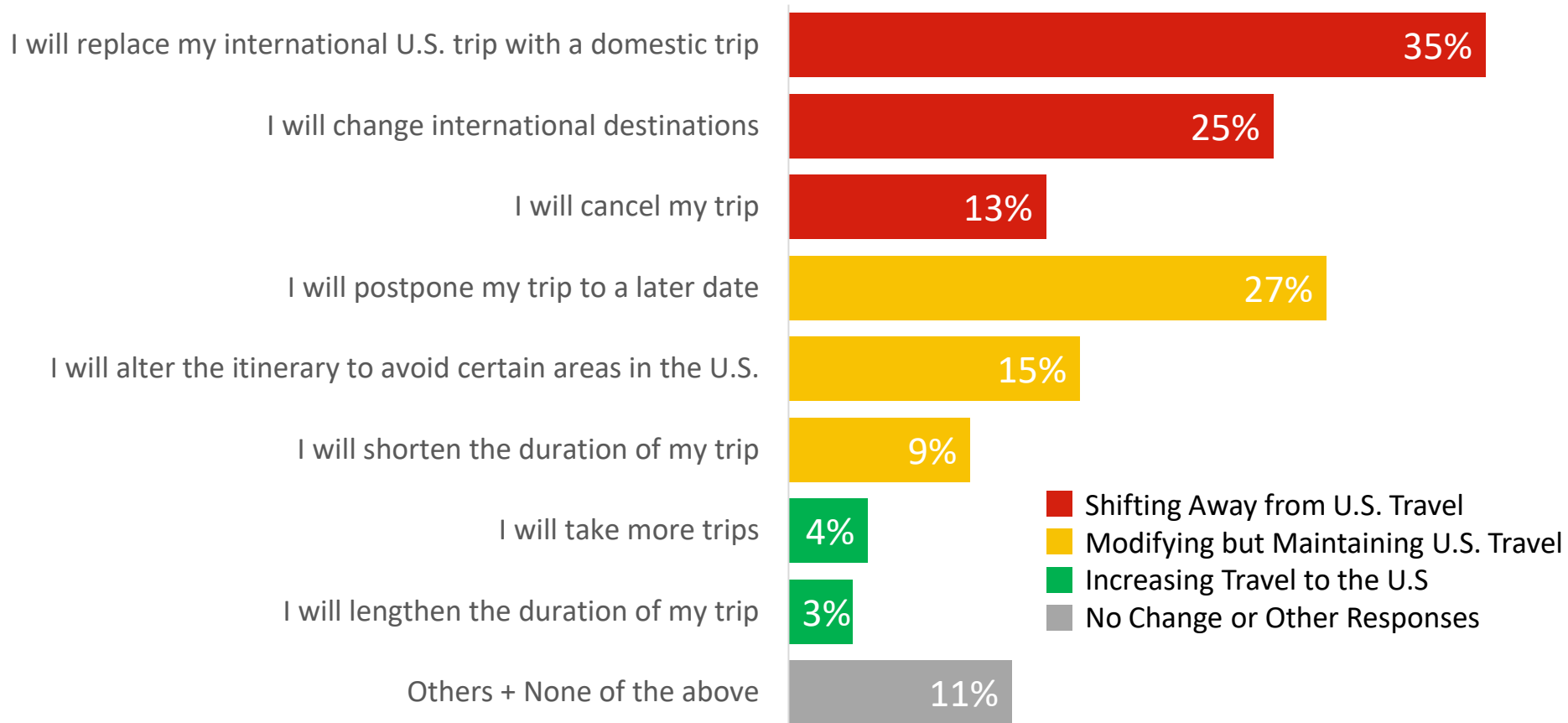
— Less Likely to Travel to U.S. — No Influence on Travel Plans — No Plans to the U.S. — More Likely to Travel to U.S.



In the most recent April 2026 study, **57% of Canadian travelers** say U.S. government policies make them **LESS LIKELY** to travel to the U.S.

Canadian Travel Adaptations: Domestic Substitution Remains Top Alternative

You indicated that the current U.S. government policies are influencing your travel plans to the U.S., how will you change your travel plans to the U.S. in the next 12 months?



Note: Respondents could select multiple options; therefore, percentages may not sum to 100%.

Alternative International Destinations: Europe, Mexico, and Asia Most Mentioned

You indicated you will change international destinations. Please specify the international destination you are considering in place of your original U.S. trip.

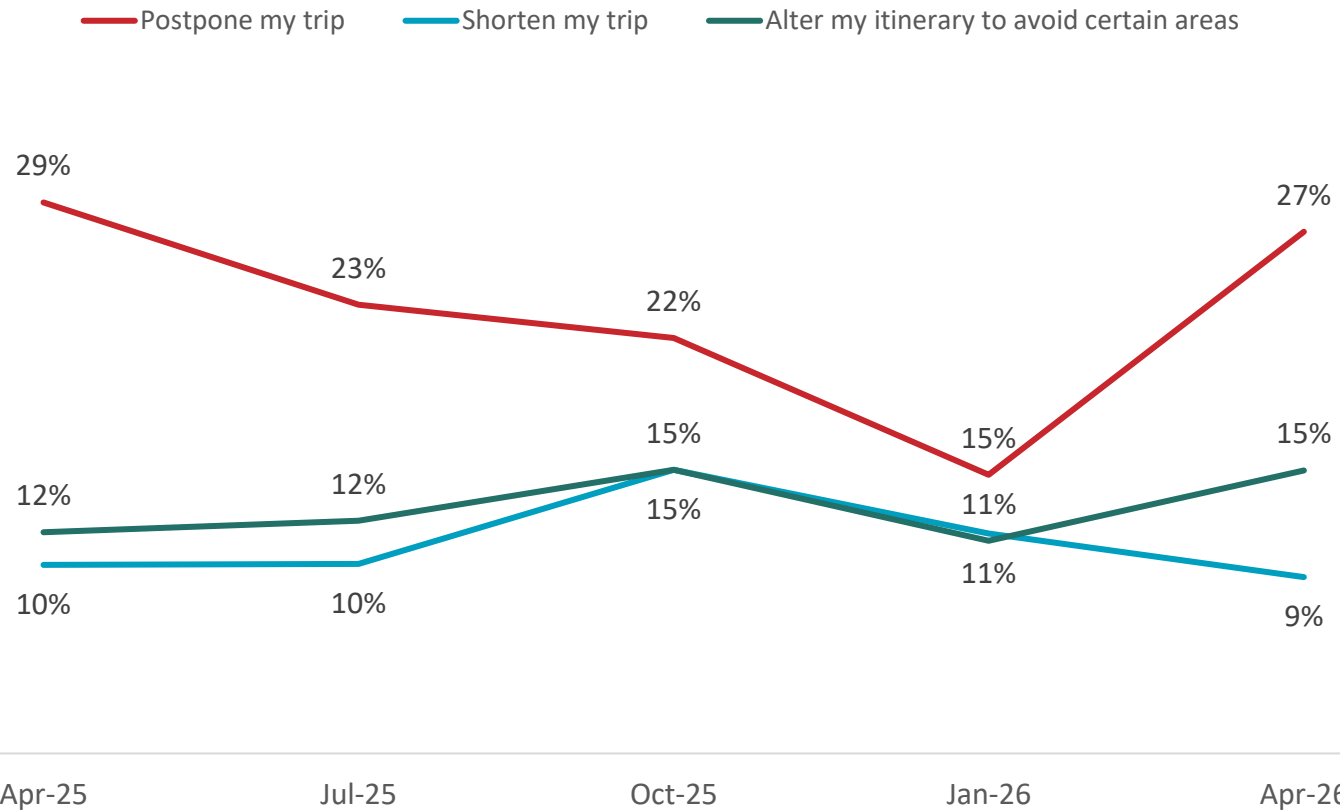


- **Europe was the most frequently** mentioned alternative international destination to U.S.
- **Mexico and Asia** were also commonly mentioned as alternatives.
- Additional destination preferences include **Japan and the Caribbean.**

Note: This data reflects responses to an open-ended question about preferred travel destinations, where respondents mentioned countries, they are interested in visiting instead of the U.S. The font size corresponds to the frequency of each country's mention, highlighting the most popular destinations among Canadian travelers. Grouped or ambiguous answers (e.g., "Europe or Asia", "Japan Mexico Costa Rica") were split, and country spellings/synonyms were standardized.

Trip Postponement Increases Among Policy-Concerned Travelers

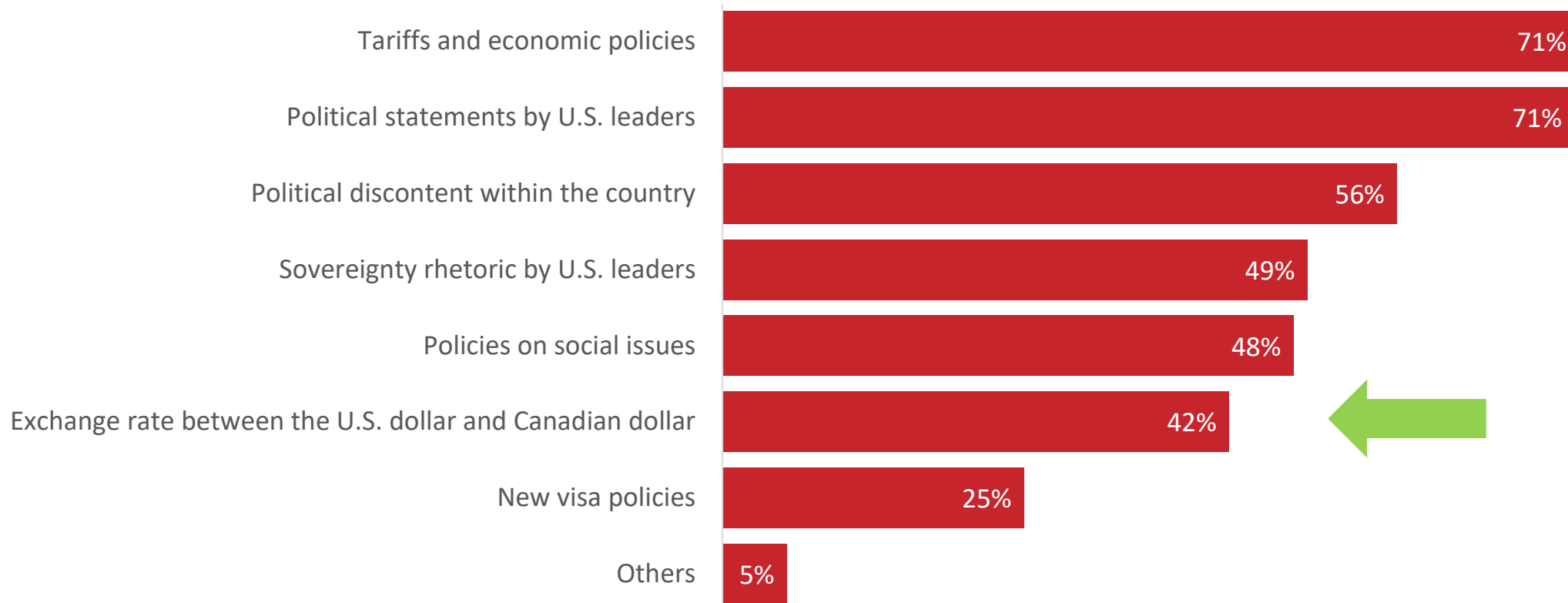
For respondents modifying but maintaining U.S. Travel: You indicated that the current U.S. government policies are influencing your travel plans to the U.S., how will you change your travel plans to the U.S. in the next 12 months?



Among policy-concerned travelers, **trip postponement increased to 27%** from **15%** in January 2026, a 13-percentage-point increase.

Tariffs and U.S. Politics... But It's the Economy Too!

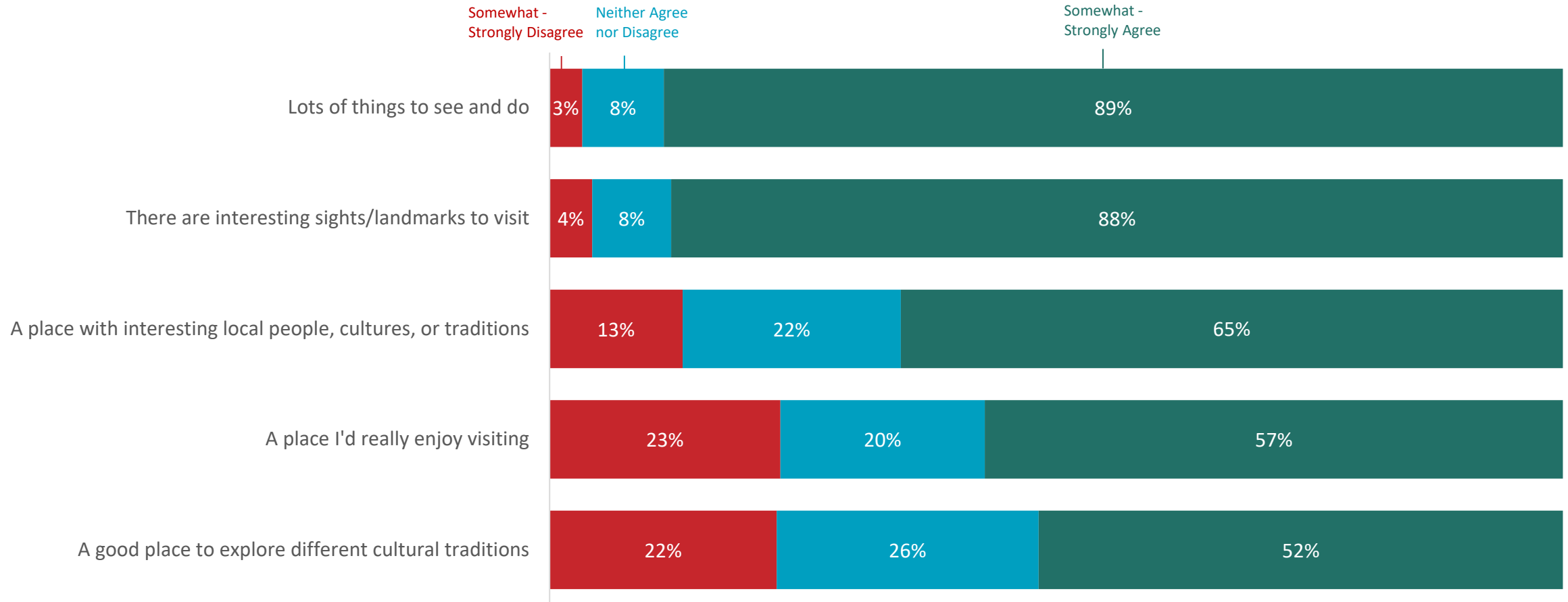
You indicated that you will change your travel plans to the U.S. in the next 12 months. Which of the following U.S. government policies, trade practices, and/or political statements caused you to change your travel plans?



Note: Respondents could select multiple options; therefore, percentages may not sum up to 100%.

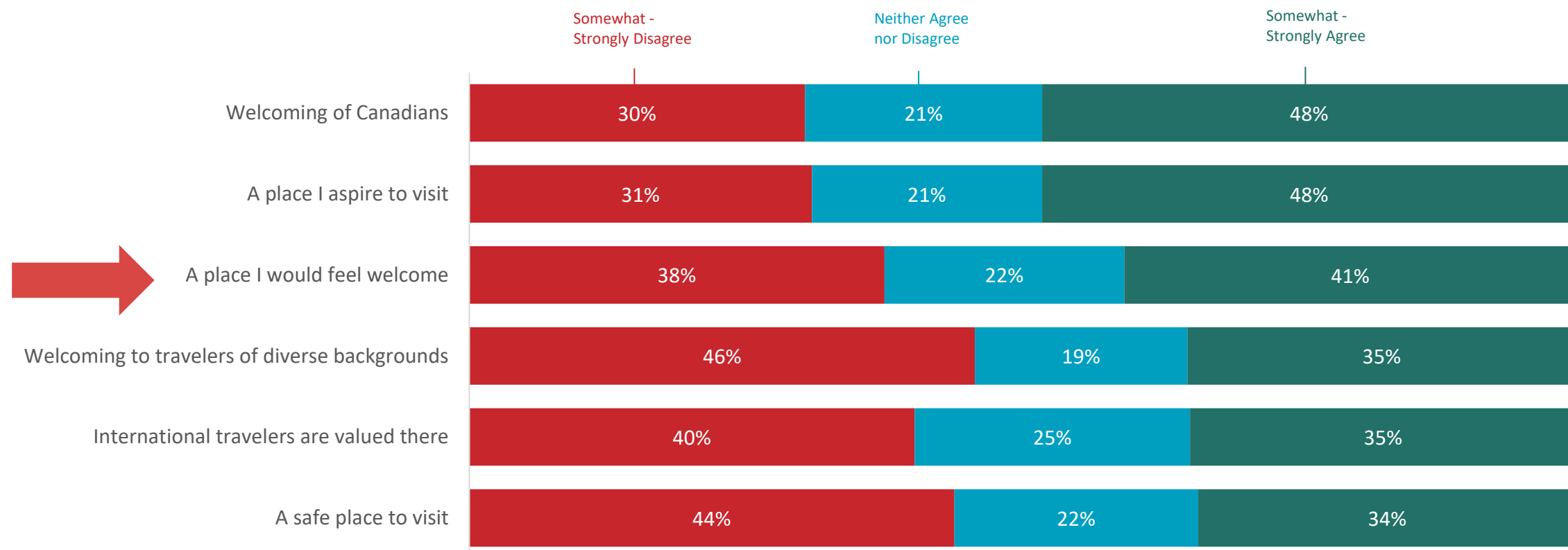
U.S. Widely Perceived by Canadian Travelers as a Place with Lots to See and Do

Please provide your personal impressions of the United States as an international tourism destination.



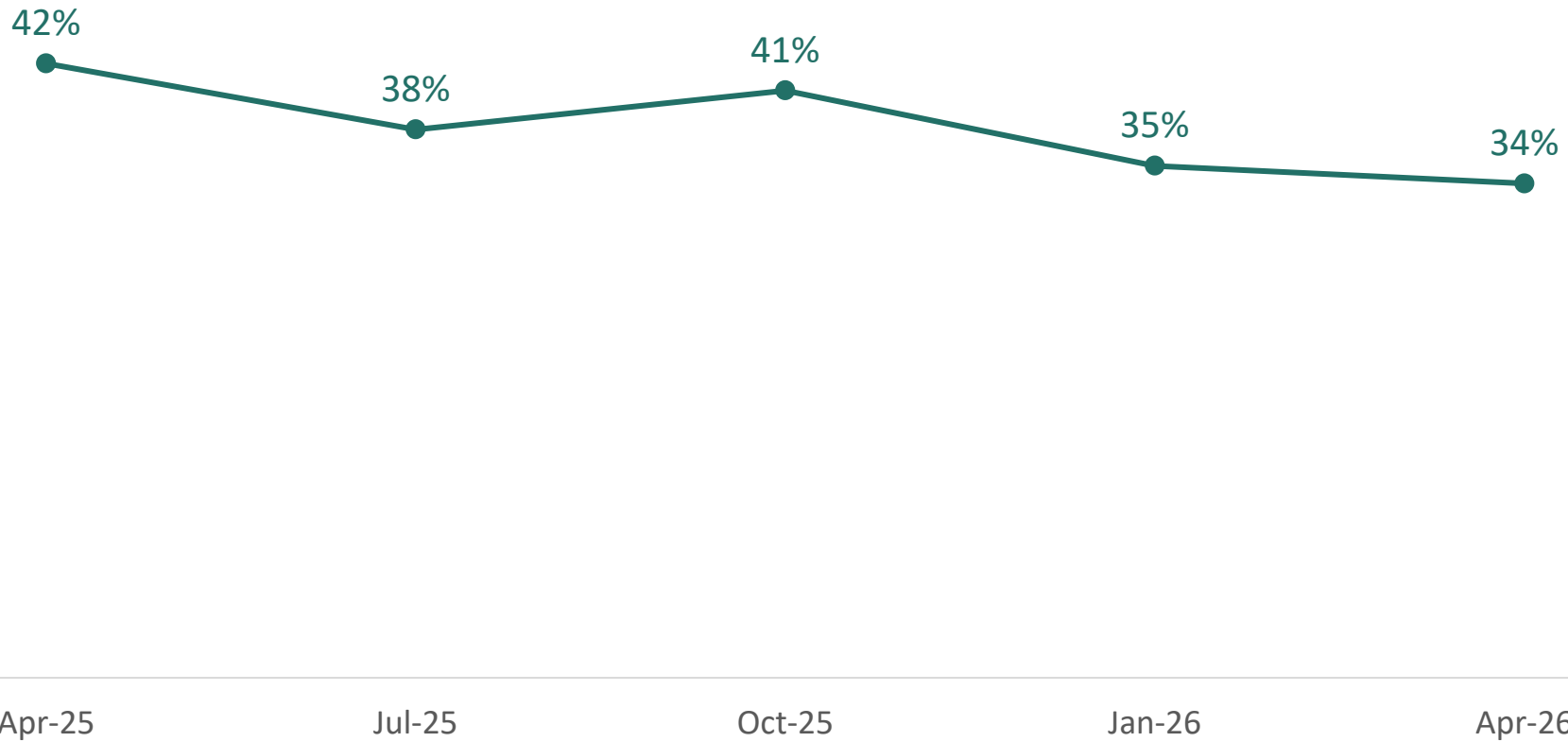
Perceptions of U.S. as Welcoming, Safe, and Valuing International Travelers Remain Low

Please provide your personal impressions of the United States as an international tourism destination.



Canadian Travelers' Confidence in U.S. Safety Continues to Decline

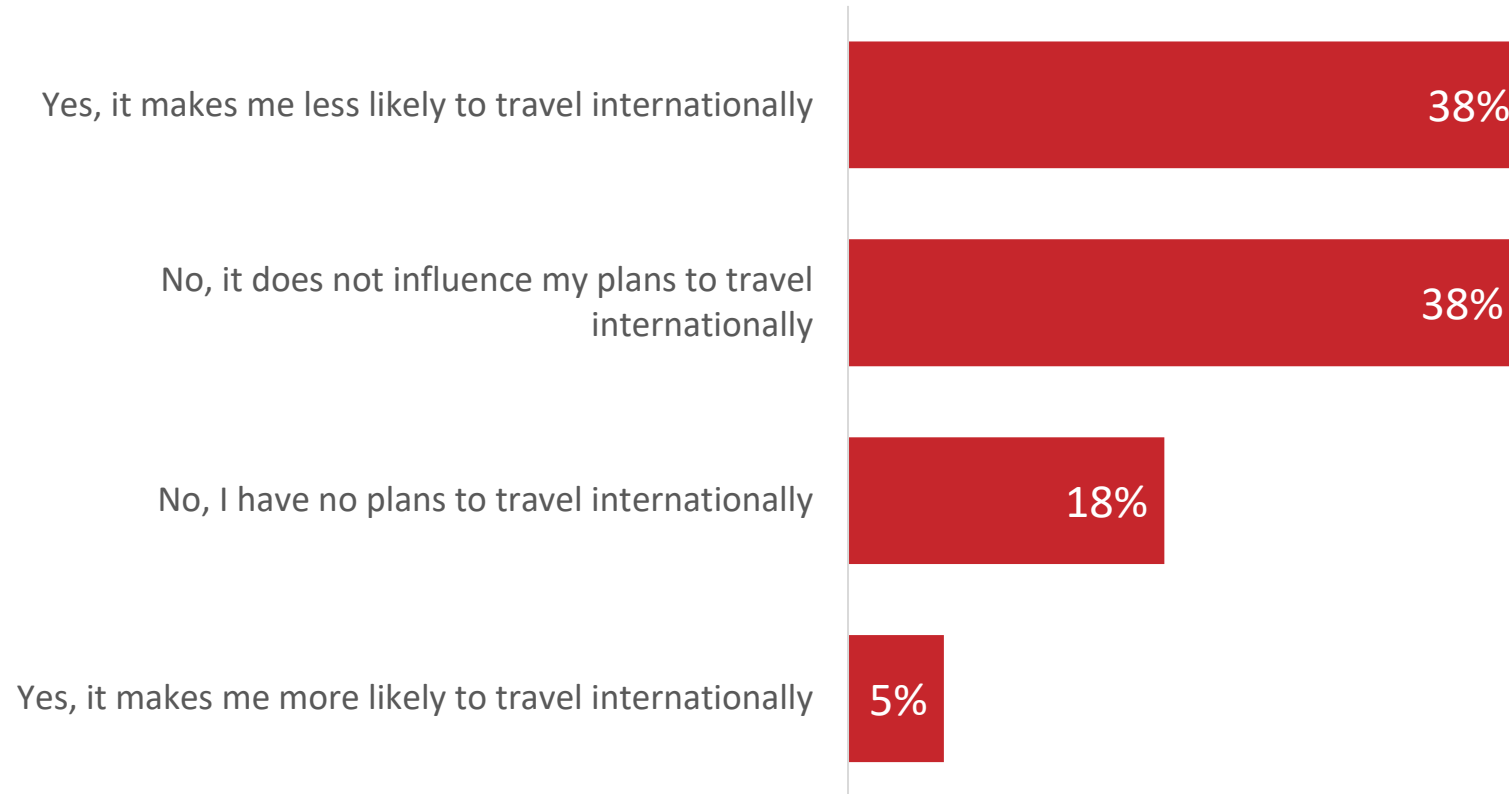
% of Canadians Agreeing with the U.S. perception: "A safe place to visit"



Only **34%** of Canadian travelers feel the U.S. is "A safe place to visit"— still declining from April 2025.

Iran War Influencing Canadian Travelers' International Travel Plans

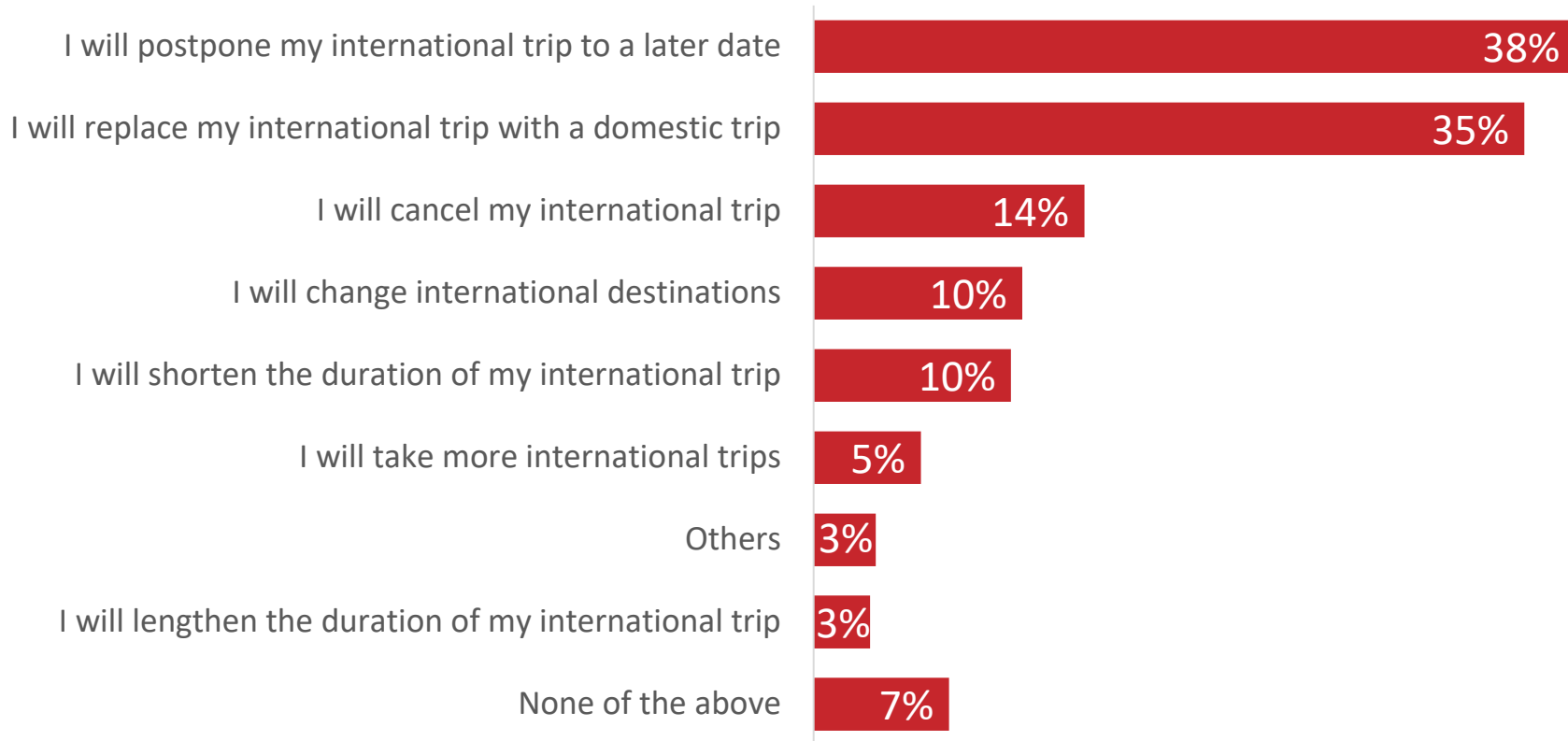
Is the Iran war influencing you to change your international travel plans in the next 12 months?



38% of Canadian travelers' are **LESS LIKELY** to travel internationally due to the Iran war.

Four in Ten to Postpone their International Trip Due to the Iran War

You indicated that the Iran war is influencing your international travel plans. How will you change your international travel plans in the next 12 months?



Among travelers who indicated the Iran war is influencing their international travel plans, **38% will postpone their international trip** and **35% plan to replace their international trip with a domestic trip.**

Looking Ahead...

Is this going to become a **TREND** for the longer term?!

Next Survey: June



So What?!

Question to Ponder...

Do we stick just to PR and special promotions with Canada, or is there a benefit for those putting paid media back into the market?



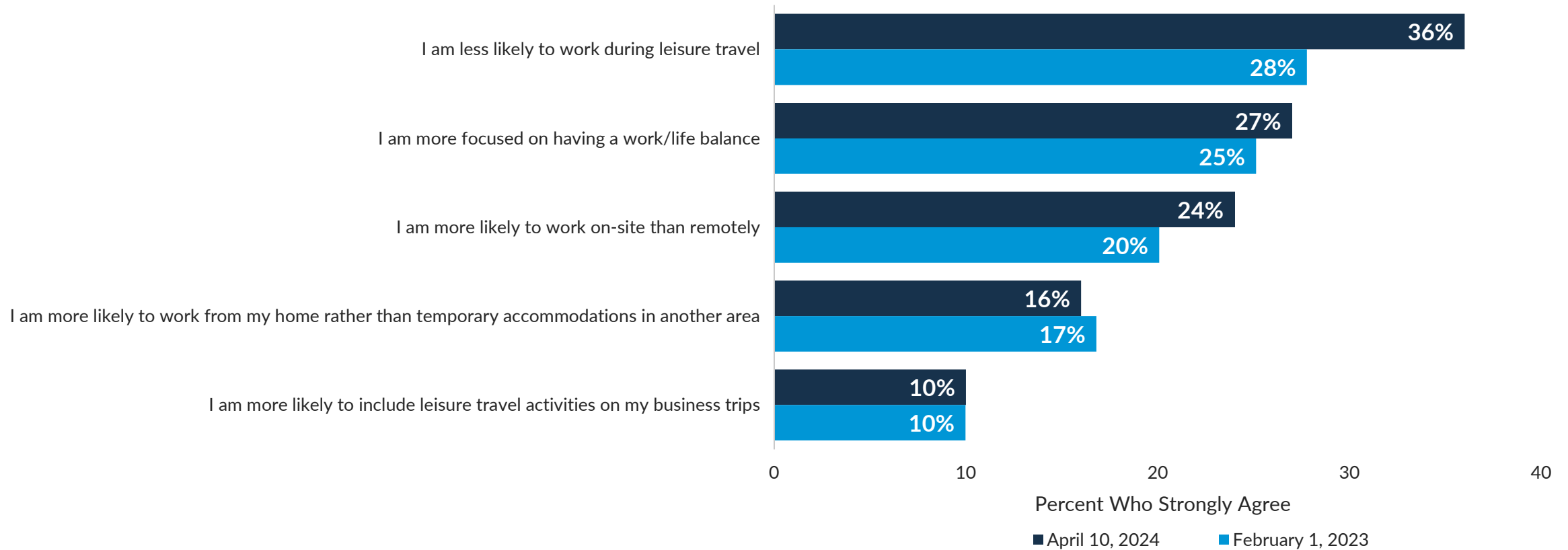
Key Learning...

A Traveler With the Expectation of Balance!



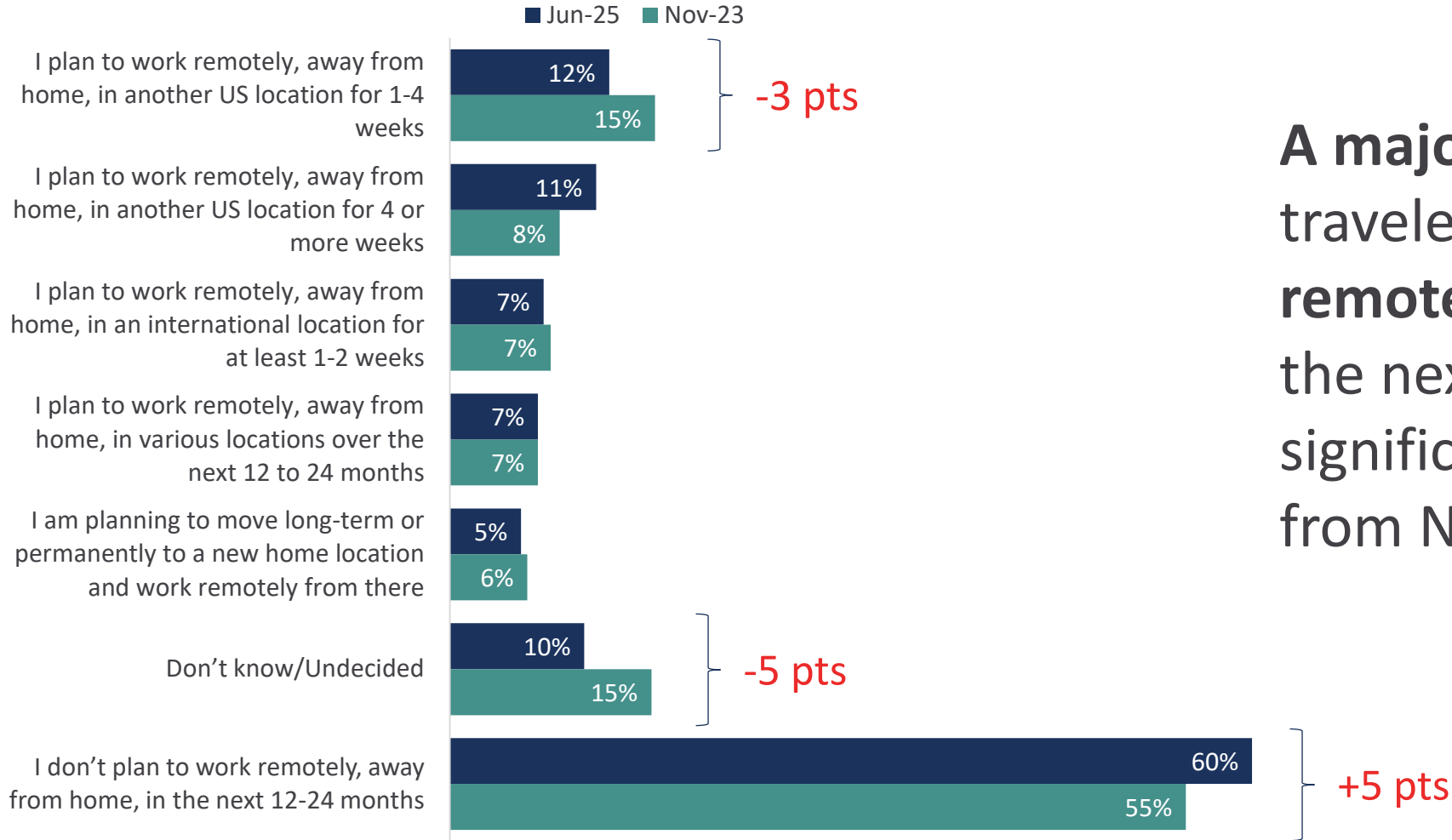
IMPACT ON TRAVEL PLANS

Strongly agree with the following statements regarding your work activities compared to 2020/2021:



Majority of Travelers Do Not Plan to Work Remotely, Away from Home

Which of the following describes your remote work plans within the next 12-24 months?



A majority (60%) of American travelers do not plan to work remotely, away from home, in the next 12-24 months, a significant 5-point increase from November 2023.

Source: Longwoods International ATS Wave 97
 Percentages are based only on respondents who are confirmed travelers (see definition in Methodology slide)

**...And can we
talk about the
word “bleisure?!”**



So What?!

The ability to **CONNECT** when you are there to **DISCONNECT** is no longer a marketable advantage... **STOP IT!!!**



So What?!

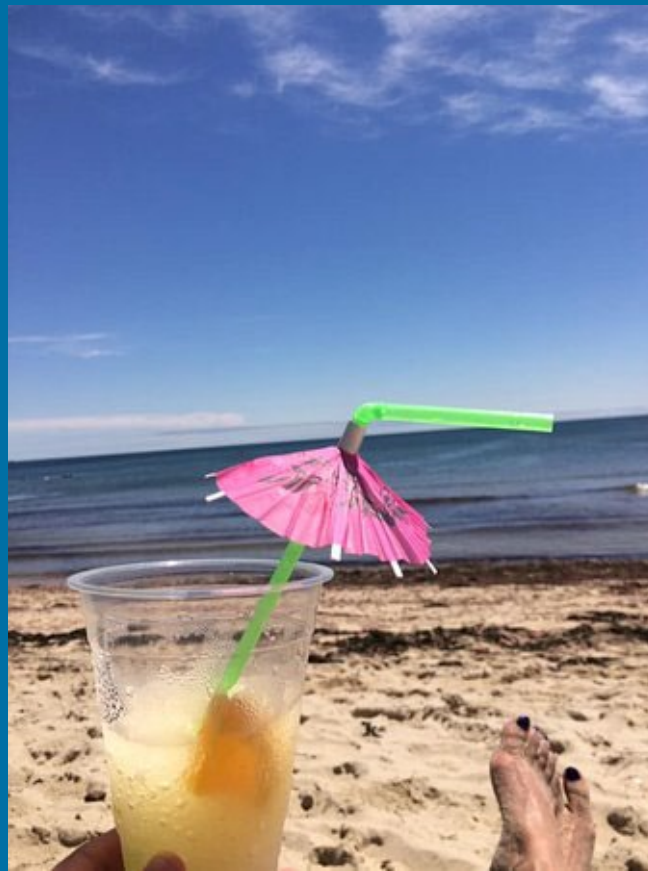
Question to Ponder...

How do you get partners/stakeholders to stop marketing “bleisure?”



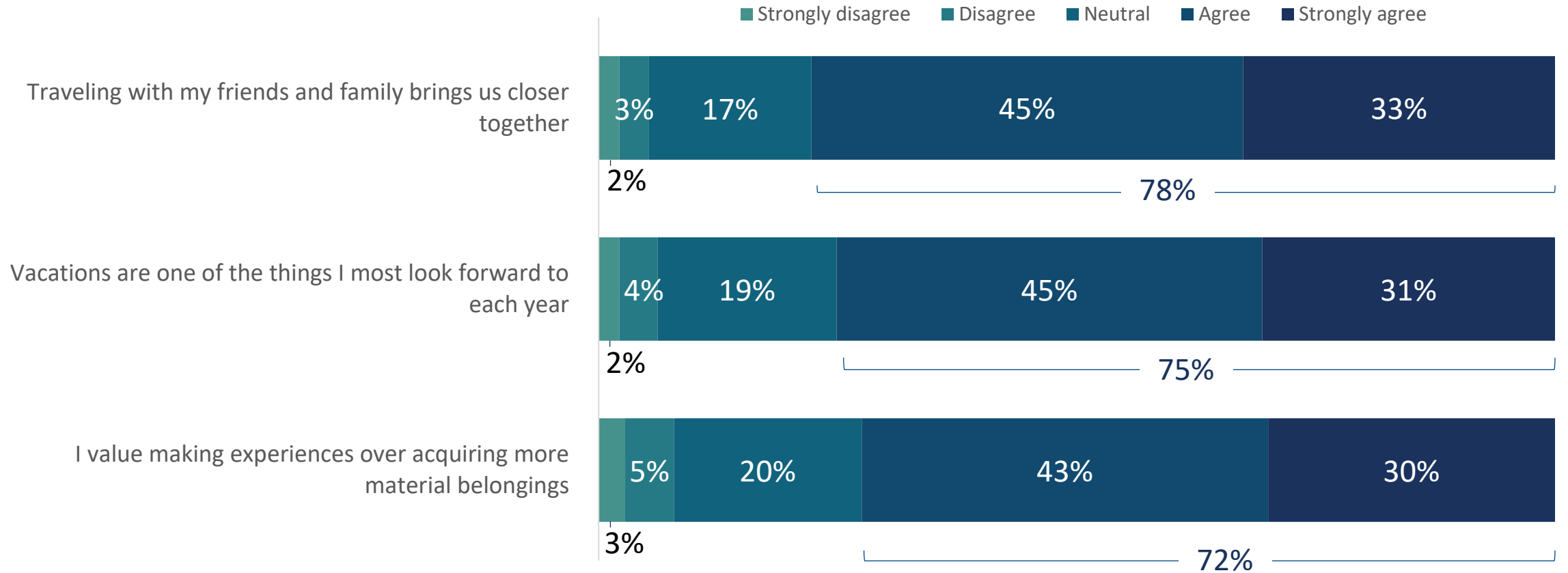
One More Key Learning...

Amid all the Disruption... Travel is also a Fulfilling Distraction!



Travelers Overwhelmingly Place High Value and Importance on Travel

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



The Bottom Line...

**More American Travelers Are Seeking
Distraction from the Disruption!**

**Overall Domestic Travel Volume Will Remain
STRONG!**

So What?!

The “RE” can draw the emotional connection between craved distraction and fulfillment of the need to get away!



2026



A “Re-fresh”



Key Learning – Opportunity!

Use Words & Images of “Re...”

- **Re**unite
- **Re**connect
- **Re**kindle
- **Re**lax
- **Re**set
- **Re**juvenate
- **Re**invigorate
- **Re**imagine
- **Re**invent, etc...

Travel becomes even more intentional.. Show them!

Whether it's active or passive... blatantly connect the dots in the hearts and minds of the travelers that their need for distraction, fulfillment, and even transformation amid the current disruptions can be met by your experiences!

Help Them Re-fresh with a Re-ason!

And the Best Part Is...

We did not even have to discuss AI...
It's very important... but not for this
conversation!



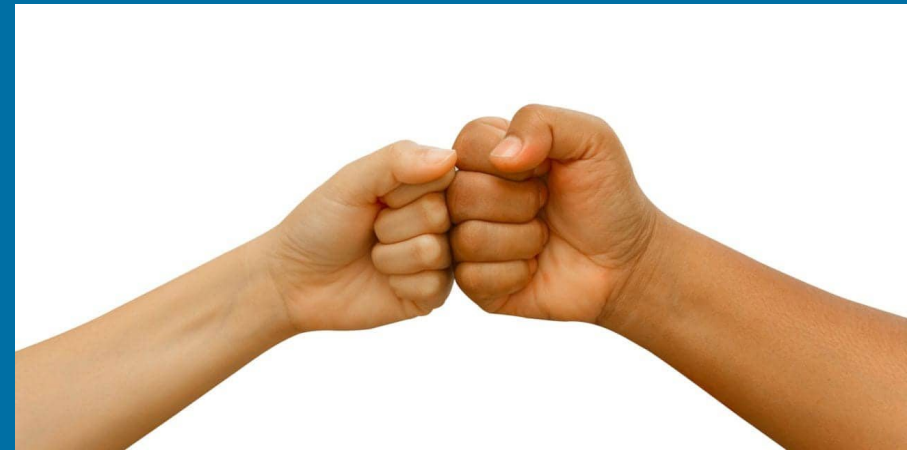
The Bottom Line: So What?!

Old Trends Among New Issues...

Always Headwinds...

But Always Opportunity!

We Got This!



Thank You!

Amir Eylon

President & CEO, Partner

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