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Right-sized American summer

2025 Deloitte summer travel survey



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Methodology note

This report relies on a survey fielded to a representative sample of Americans, between March 26 and April 1, and again between April 7 and April 9. The first fielding reached 1,794 travelers; the second reached 1,064 travelers. Please refer to source lines for clarification on questions asked and sample sizes.

Throughout the report, readers will notice several references to travelers' longest trips or **marquee summer trips**. Because most travelers will take multiple trips across the season, including a mix of family visits and adventures in new destinations, it is useful to delve into the longest trip. Travel behaviors across the season, combined with patterns and preferences for the longest trip, can provide a more comprehensive view of travel decisions and purchase trends.

Where the report refers to generations, the following birth years are applied: baby boomers: 1946 to 1964; Generation X: 1965 to 1980; millennials: 1981 to 1996; Generation Z: 1997 onward, adults only.

Right-sized American summer

Americans intend to travel at a healthy clip, but after developments in the economy in early April, many scaled back on spend increases

Deloitte's ConsumerSignals showed a year-on-year decline in Americans' sense of financial wellbeing in April 2025,¹ and a bigger month-on-month dip. In these circumstances, it would be understandable if more planned to forego travel this summer. Instead, 53% plan to take leisure vacations, an increase from 48% in 2024,² making this year one of the highest-incidence summers since the COVID-19 pandemic. Trip frequency is up as well, as many add more quick getaways to their calendars.

Across two fieldings of the survey—in the last week of March, and in the second week of April—Americans held onto the basics. Travel incidence, number of trips, and the length of their longest trip stayed similar.

However, over a two-week period, Americans' vacation plans changed in one big way: the amount of money they plan to spend. The average summer travel budget was set to grow 21% year on year, as of late March. By early April, that figure dropped to 13%.

In summer 2024, fewer Americans traveled, and those who did planned to spend enthusiastically to maximize their experiences. This year's trends appear poised to run in the opposite direction—more travelers and more trips, but a more frugal approach.

The more frugal approach will likely be felt unevenly across the travel industry. Rather than shy away from any categories in huge numbers, travelers surveyed are making individual choices to fit their trips into smaller budgets. And plans might change with further economic developments, or at the time of bookings, and even in destination. But there are a few adjustments that appear to be trending: more driving instead of flying, fewer international trips and destination resort stays, and reduced spend on certain in-destination experiences.

In the post-pandemic years, leisure travel has benefited from a strong prioritization of discovery and new experiences. While it seems that many still place a high value on travel, this summer may be more challenging than recent ones. And although this report explores only Americans' travel plans, government data indicates recent weakness in inbound travel. Noncitizen arrivals to the United States were down 10% year on year in March, including a 14% drop in European visitors.³

Travel providers should plan to be nimble this summer. Timely and targeted deals and offers can help reach travelers at the right moment and attract any incremental dollars they may be willing to spend. And delivering memorable experiences with minimal fuss can help to keep travel high on the list of priorities in the year ahead.

Key findings

Strong travel demand continues amid economic uncertainty

More Americans plan to travel this summer. Those surveyed plan to take more trips: 3.1 on average, versus 2.3 in 2024. Quick getaways of three nights or fewer will account for much of the rise in trips.

Many also plan to extend their longest vacation of the summer. Forty-five percent **of travelers say their longest trip will last a week or more, up from 39% in 2024.**

Spend expectations dampen, but not trip frequency

Surveyed in March, Americans were financially optimistic and had significantly more ambitious travel plans compared with 2024. But for those surveyed in early April, those plans shifted significantly: **Summer travel budget gains fell from 21% to 13%.** This change appeared across generations and income levels, but Gen Zers and those with household income under \$100,000 were the most affected.

Some hold fast to bucket-list trips, while others add quick getaways to the calendar

While the planned travel spend trend decreased across all demographics from March to April, not all are reacting in the same way. **Many of those who had planned a “bucket list” trip, or one that was otherwise particularly special, still say they are increasing spend significantly over 2024.** At the same time, many are adding quick getaways to the calendar.

Travel budget adjustments will be felt more by some travel suppliers than others

Many plan to cut back on flights in favor of driving. Fewer travelers—across all income groups—plan to stay at destination resorts. And in-destination activities are shifting slightly toward the free variety, as more travelers say they plan to engage in outdoor activities and fewer say they will book guided tours.

Also, some changes can be expected in travel shopping. Notably, **Americans with household income of \$200,000 and above are weighing price more heavily this year when they shop for flights and hotels.**

2025 summer travel demand outlook

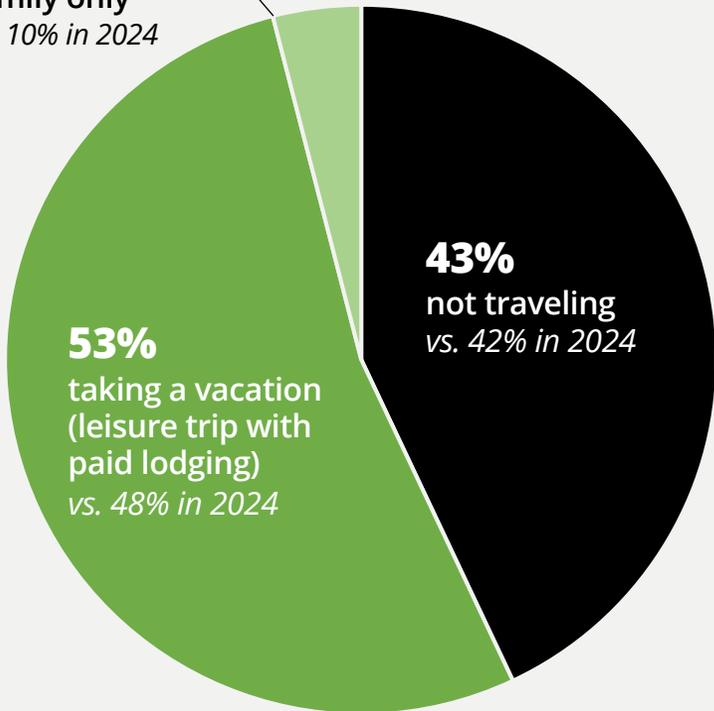
Incidence, frequency,
and spend trends



More than half of Americans plan to travel this summer, and many will take more trips than in 2024

4%

traveling to stay with friends or family only
vs. 10% in 2024



Share of Americans traveling this summer and staying in paid lodging



Average number of summer trips



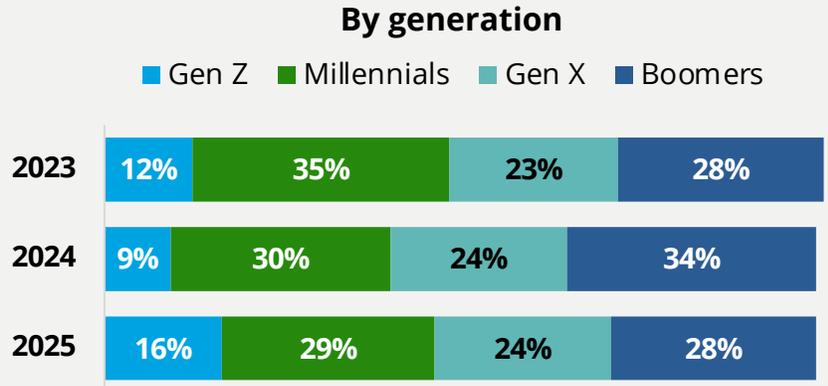
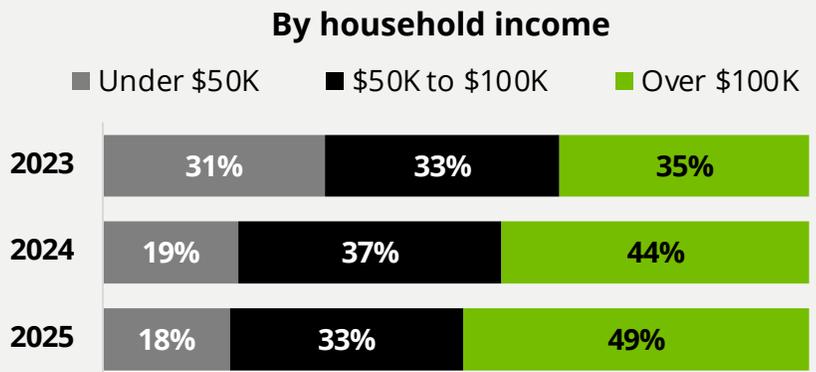
Questions: (1) What activities are you planning to partake in during summer 2025 (between Memorial Day and the end of September)?; (2) How many trips have you booked or are you planning to take in summer 2025?

Note: n (1) = 2,040; n (2) = 1,154.

Source: 2025 Deloitte summer travel survey.

The shift toward a deeper-pocketed traveling public continues, as those with household income of \$100,000+ make up almost half of 2025 summer travelers. Gen Z also gains share as boomers' plans recede.

Traveling public demographic mix

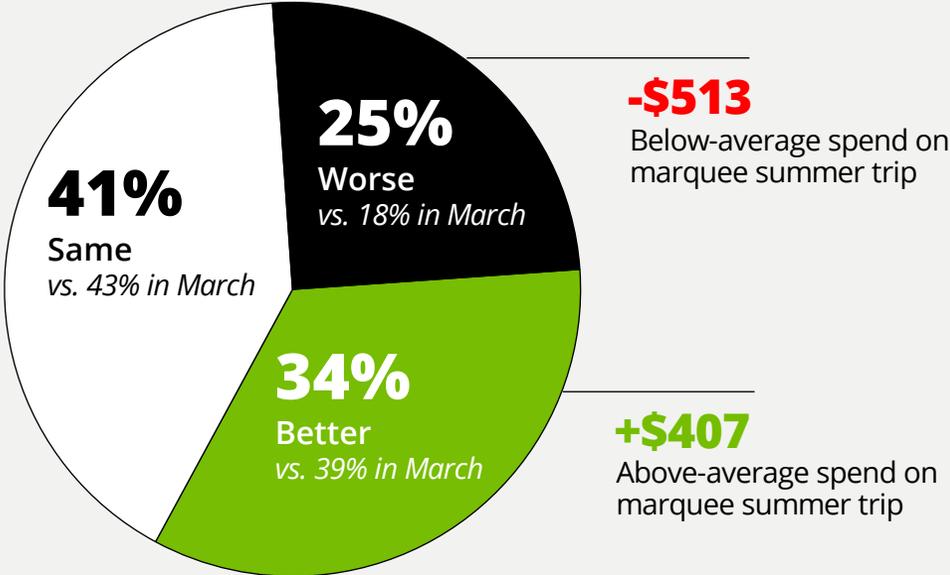


With higher earners accounting for a bigger share of travelers, some of their behaviors, such as more frequent and more international trips, appear more prominent across the traveling public. Likewise, Gen Z's behaviors, such as use of social media, may be playing a bigger role across the travel landscape.

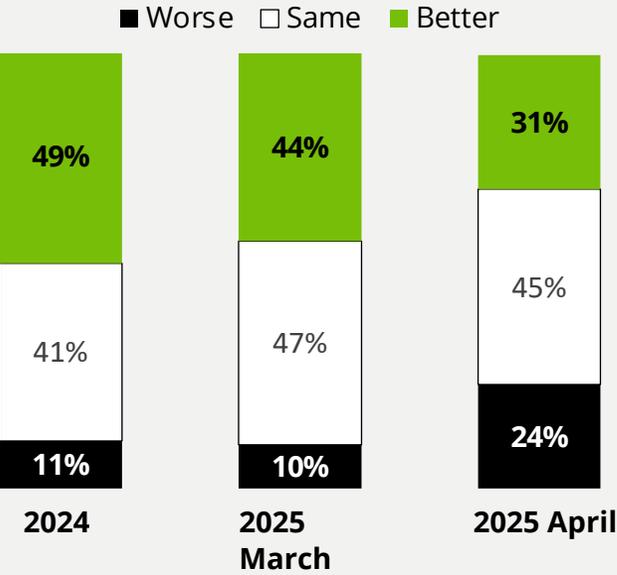
Question: What activities are you planning to partake of in summer 2025 (between Memorial Day and the end of September)? (Select all that apply)
 Note: n = 1,154.
 Source: 2025 Deloitte summer travel survey.

Travelers surveyed feel better off financially than they did last year, but their outlook dimmed from March to April

Financial situation among summer travelers (compared with 2024)



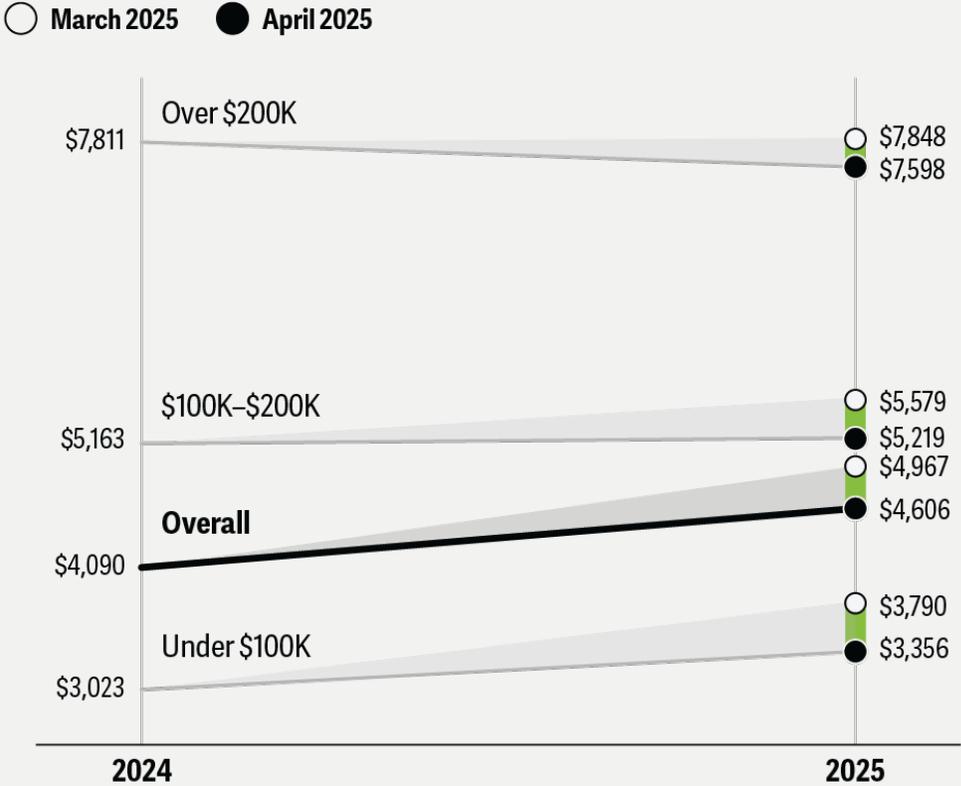
Household financial situation versus one year ago, travelers with \$200K+ household income



Question: Thinking about your household's current financial situation, would you say it is... (please select one).
 Notes: n (April) = 1,064, n (income over \$200K) = 160; n (March) = 1,794, n (income over \$200K) = 239.
 Source: 2025 Deloitte summer travel survey.

Average planned summer travel budgets are up 13% compared to 2024, after a downward adjustment from March intentions. Marquee trip budgets followed a similar pattern.

Seasonal travel budgets (full summer)



Marked shift in marquee trip spend

Among those surveyed in late March, travelers had planned to increase marquee trip budgets to US\$3,987 – 13% higher than 2024. For April respondents, **the average budget shrank to US\$3,471, less than 1% higher than in 2024.**

Younger travelers with higher household incomes made the biggest changes to marquee trip budgets.

Boomers put the most emphasis on a special or bucket list trip, which might explain why they appear less willing to cut back spend for that trip.

Questions: (1) What is your total estimated travel budget for your trips this summer?; (2) How much is the estimated budget for your longest summer trip including paid lodging?
 Note: n = 1,936 in 2024; 1,794 in March; 1,064 in April.
 Source: 2025 Deloitte summer travel survey.

The share of Americans surveyed planning to significantly increase their longest-trip budgets dropped from 1 in 4 in 2024 to less than 1 in 5 in 2025

How does your 2025 trip budget compare to your budget in 2024?

14%

Significantly less
same as in 2024

Why less?

Financial concern has grown slightly as a reason for cutting budgets. For respondents surveyed in April, 28% of those decreasing marquee trip budgets said they are shifting spend away from *one big trip* in favor of traveling *more frequently*. That rose from 18% among respondents in March.

19%

Significantly more
versus 25% in 2024

Why more?

It's about special trips. Reasons for spending more shifted significantly toward making this trip special, from March to April. In April, 49% attributed higher spend to bucket list trips versus 41% in March. In keeping with this trend, upgraded spend is shifting mostly to air (including switching to international trips) and in-destination spend.

Questions: (1) How does your budget for this trip compare to your budget for your longest summer trip in 2024? (2) What best describes why you are spending more/less on this trip than you did on your longest summer trip in 2024? (3) What, if any, adjustments are you making versus last year's trip that make it more/less expensive?

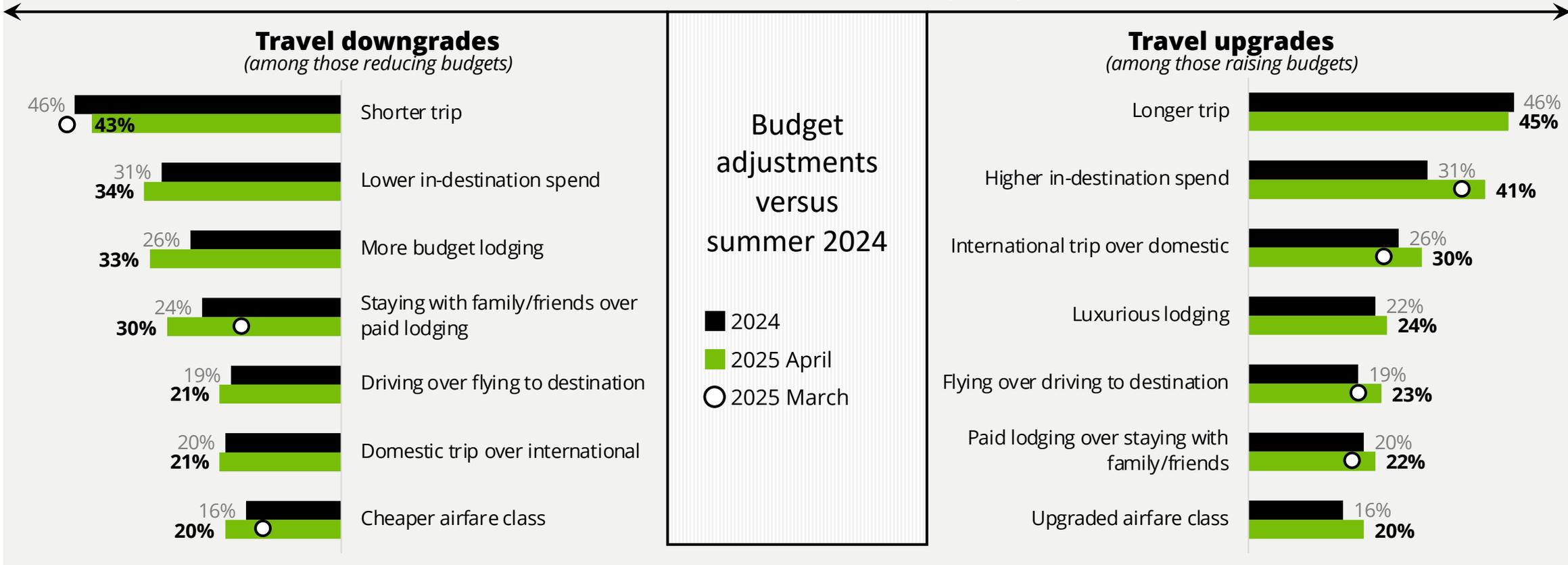
Note: n = 1,064.

Source: 2025 Deloitte summer travel survey.

Travelers surveyed continue to pull common levers to raise or reduce trip budgets. But more are relying on adjusting in-destination spending, lodging type, and class than last year.

When pulling back on trip budgets, more travelers are downgrading their lodging, staying with friends or family, or picking cheaper airfare classes this year compared with 2024

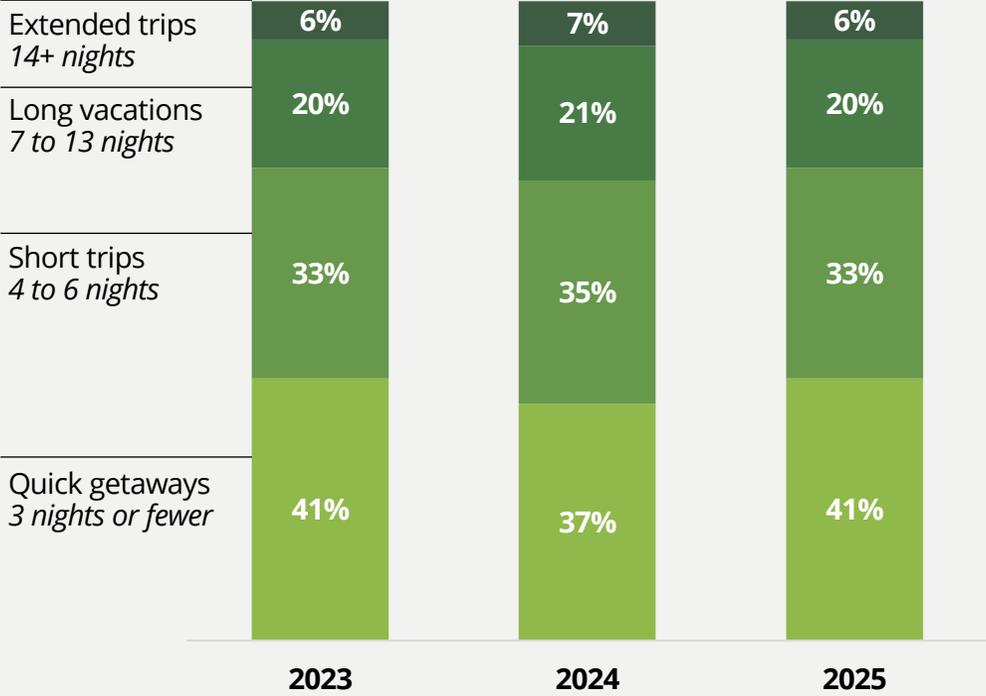
When increasing trip budgets, travelers are increasingly spending on in-destination activities, international trips, flying, and upgraded airfare when splurging on their summer trips this year



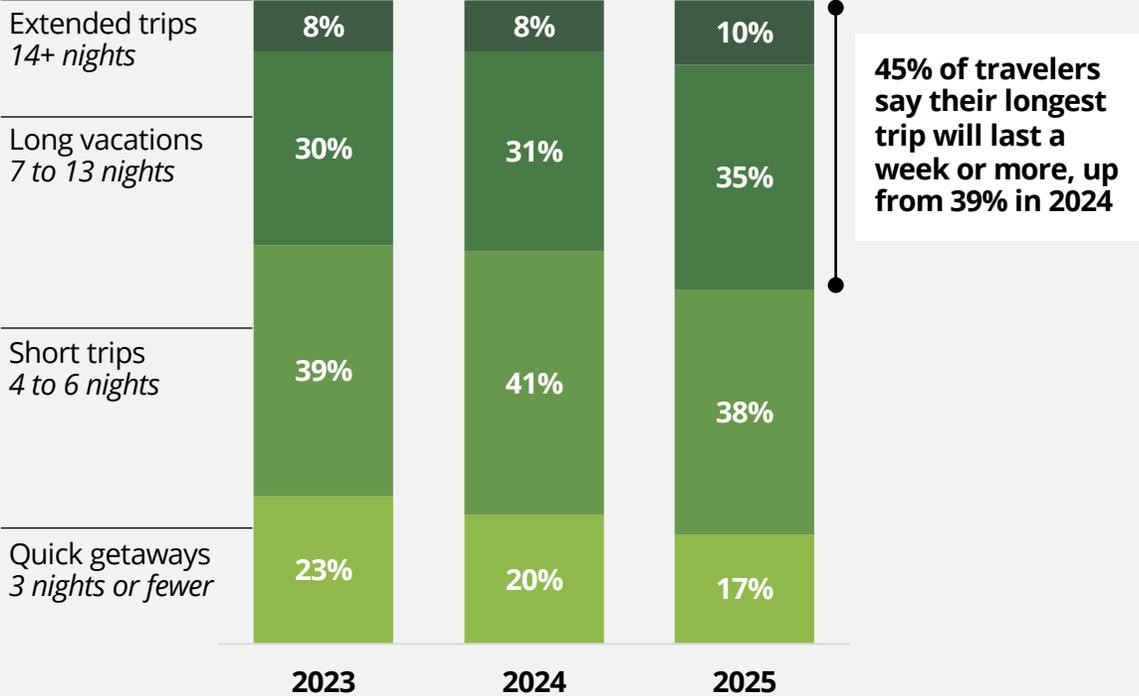
Question: What, if any, adjustments are you making versus last year's trip that make it more/less expensive?
 Notes: n (more expensive) = 193; n (less expensive) = 138. March data is highlighted for spend categories that changed significantly in April.
 Source: 2025 Deloitte summer travel survey.

Quick getaways account for much of the rise in trip frequency. But when it comes to the longest trip of the summer, many respondents are adding days.

All summer trips, share by length, 2023 to 2025



Marquee summer trip, share by length, 2023 to 2025



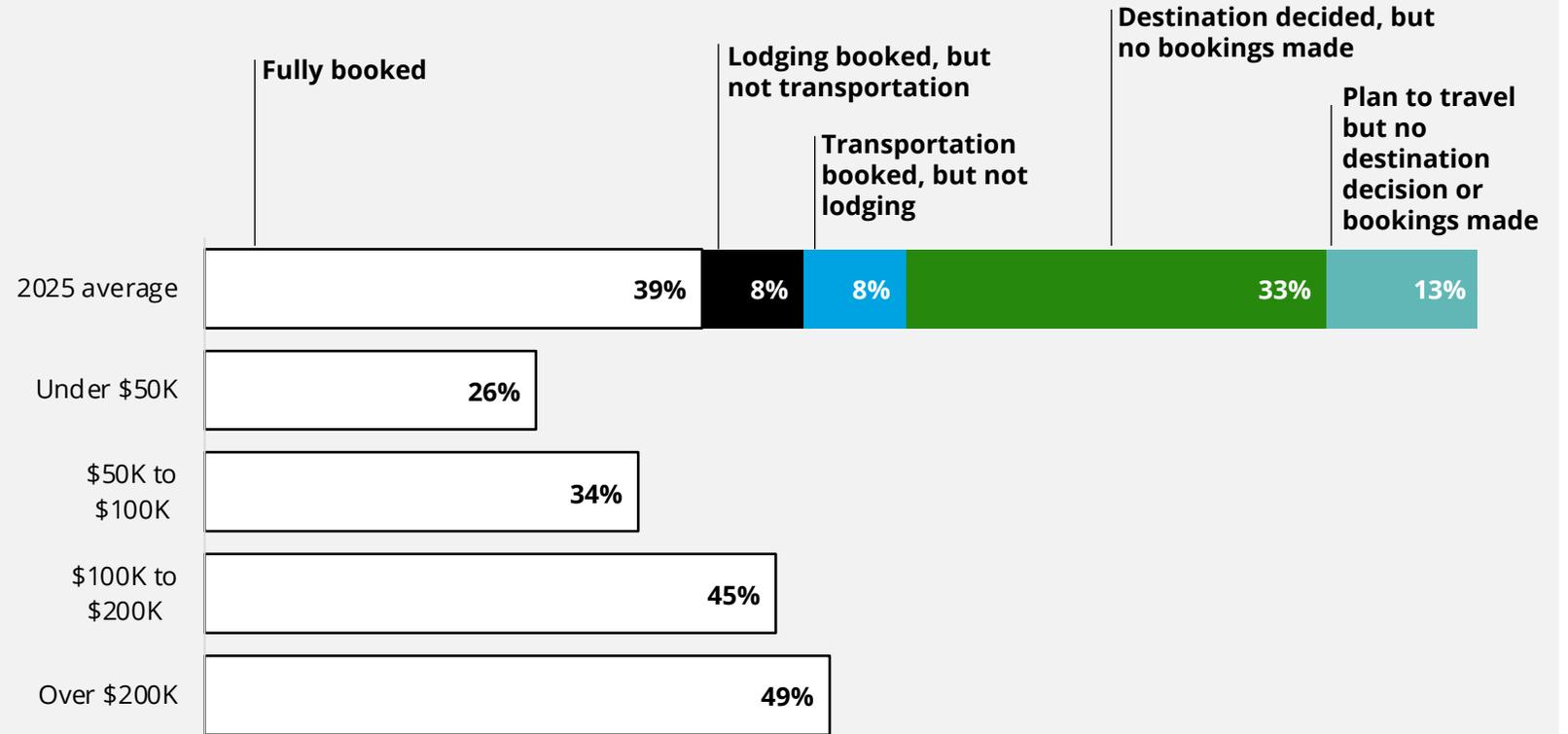
Questions: (1) How many of your summer trips will be...? (2) How long will your longest trip this summer be?
 Note: n = 1,054.
 Source: 2025 Deloitte summer travel survey.

4 in 10 marquee trips were fully booked by early April

With more than half (55%) of trips at least partially booked, developments in the economy are unlikely to have a big influence on Americans' longest trips of the summer

Question: Thinking of the longest trip you will take this summer, how would you describe your progress in planning and booking this trip?
 Note: n = 1,064.
 Source: 2025 Deloitte summer travel survey.

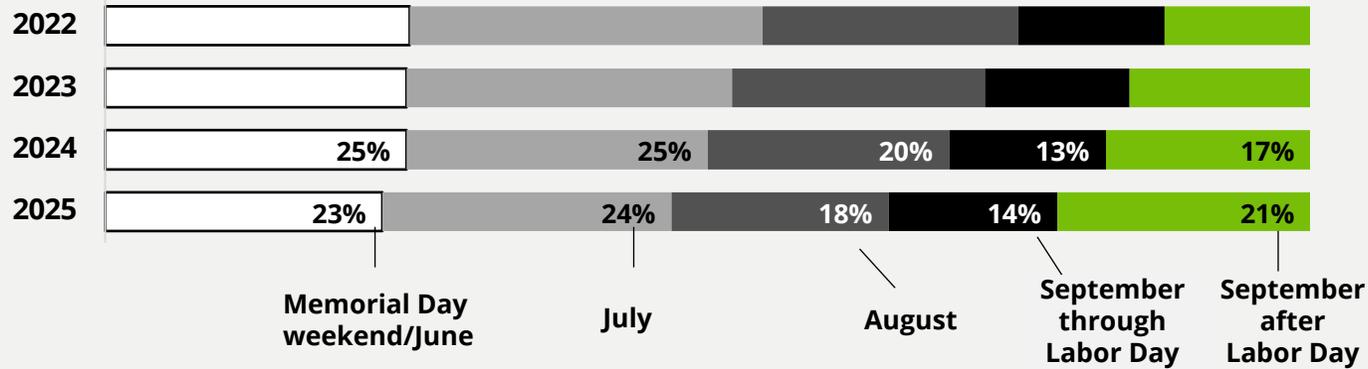
Booking status of marquee summer trip (April 2025 respondents)



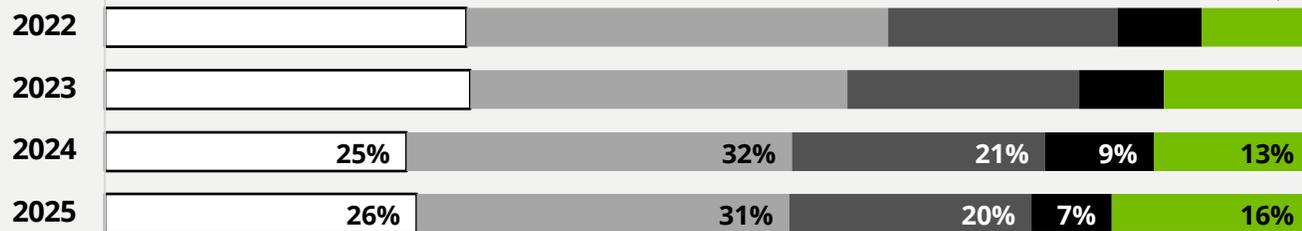
The shift toward more post-Labor Day travel continues, as more Americans surveyed extend the summer with late-season trips

Timing of summer trips

All trips



Marquee trip



1 in 3

boomers are taking their marquee summer trip post-Labor Day

(up from 1 in 4 in 2024, and versus 4% of Gen Z in 2025)

1 in 4 travelers with income of \$200,000 and above are planning their marquee summer trip for after Labor Day (versus 1 in 7 of those with lower incomes)

Questions: (1) How many of your summer trips will begin in each of the following time periods? (2) When will your marquee summer trip take place? If your trip spans more than one of the provided dates, select the option that reflects a majority of your trip.

Note: n = 1,064.

Source: 2025 Deloitte summer travel survey.

Affordability remains the biggest deterrent for non-travelers surveyed; most travelers report that high prices have forced some adjustments to their trips

Reasons for not traveling	2025		2024	2023	2022	2021
	March	April				
Cannot afford it	35%	38%	39%	50%	44%	31%
Travel is too expensive right now	28%	30%	32%	24%	NA	NA
Rather spend on other things	18%	17%	19%	16%	19%	15%
Concerned about travel disruption	7%	6%	6%	6%	NA	NA

In April, financial concerns became a slightly more prominent barrier to travel

Most of those who plan to travel acknowledge high prices have prompted some changes to trip plans in the past year

Airfare	Room rate
22% decided to drive instead of fly	24% stayed with friends or family instead of at a hotel
19% decided not to take a trip	19% downgraded accommodations
12% selected a less convenient itinerary	18% decided not to take a trip
41% report no changes due to high airfare	38% report no changes due to high room rates

Questions: (1) Why are you unlikely to travel this summer? Select up to three. (2) Which of the following have you done in the past year due to the cost of (flights/hotels)? Select all that apply.
 Notes: n (1) = 880, n (2) = 2,040.
 Source: 2025 Deloitte summer travel survey.

Some respondents changed transportation plans from March to April, opting for road trips instead of flights, and pulling back on international travel

On marquee trips, more travelers are taking long road trips (8+ hours) to reach their destination compared with 2024

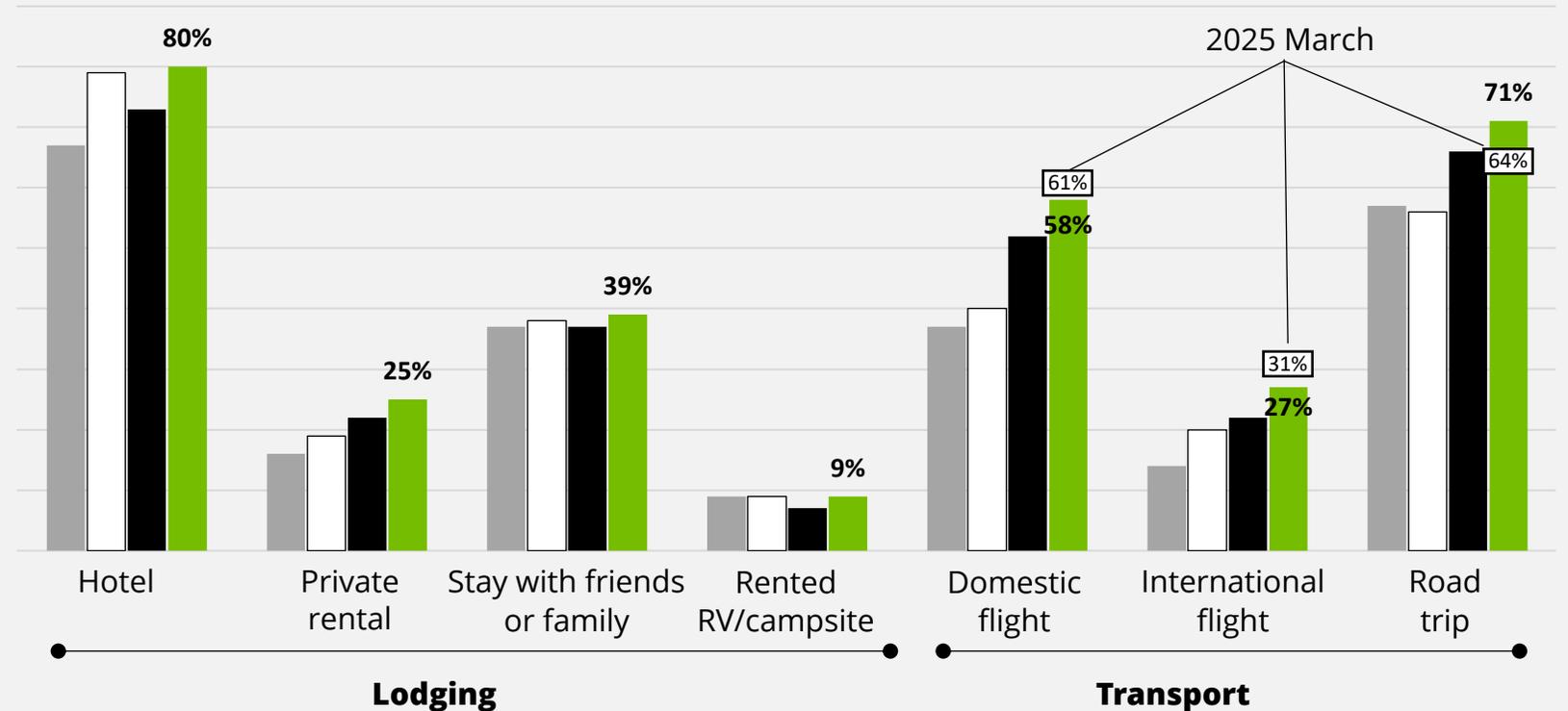
Question: Across your travels this summer, which accommodation/transportation options are you likely to use? Select all that apply.
 Notes: n = 1,154. March incidence is only noted where there is a notable shift from March to April.
 Source: 2025 Deloitte summer travel survey.

Compared with 2024, more Americans plan to stay in hotels and private rentals at least once

Travel segment usage, full summer

(percentage of US travelers using travel segments across summer trips)

● 2025 ● 2024 ○ 2023 ● 2022
 April

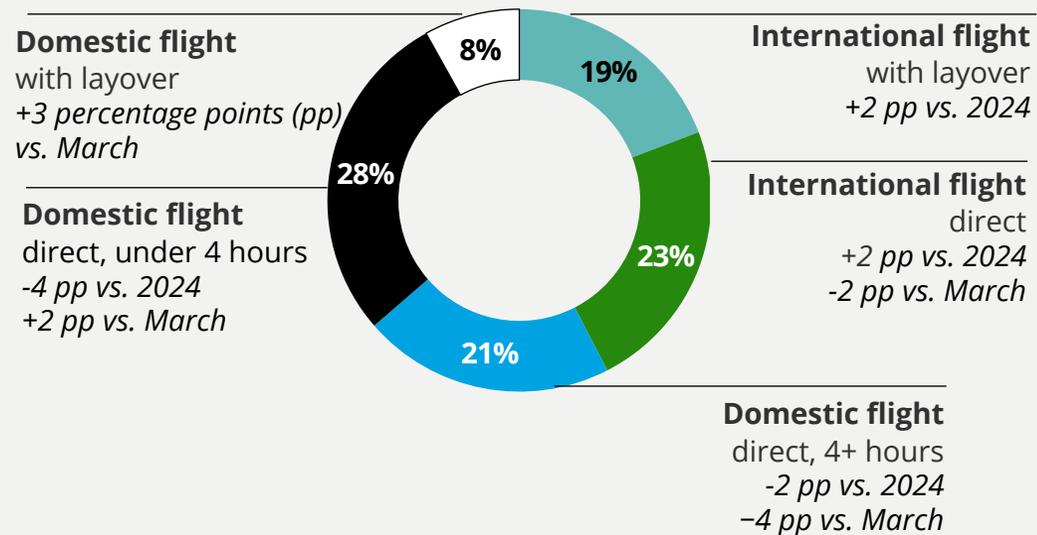


For marquee trips, international travel rises, even after a slight downward adjustment from March to April

More flyers surveyed said they will opt for lower-priced options, leaving demand for premium fares below 2024 levels

55% of paid lodging travelers will fly on their longest trip
(versus 51% in 2024 and 2023)

Flight type, marquee summer trip*



Type of airfare booked/planned



In March, responses indicated a small shift toward more premium fares (45% versus 43% in 2024).

Even high-income travelers are taking a flight downgrade. More are booking lower-fare tickets with their preferred airlines (36% versus 28% in 2024) instead of purchasing upgrades or first-class tickets.

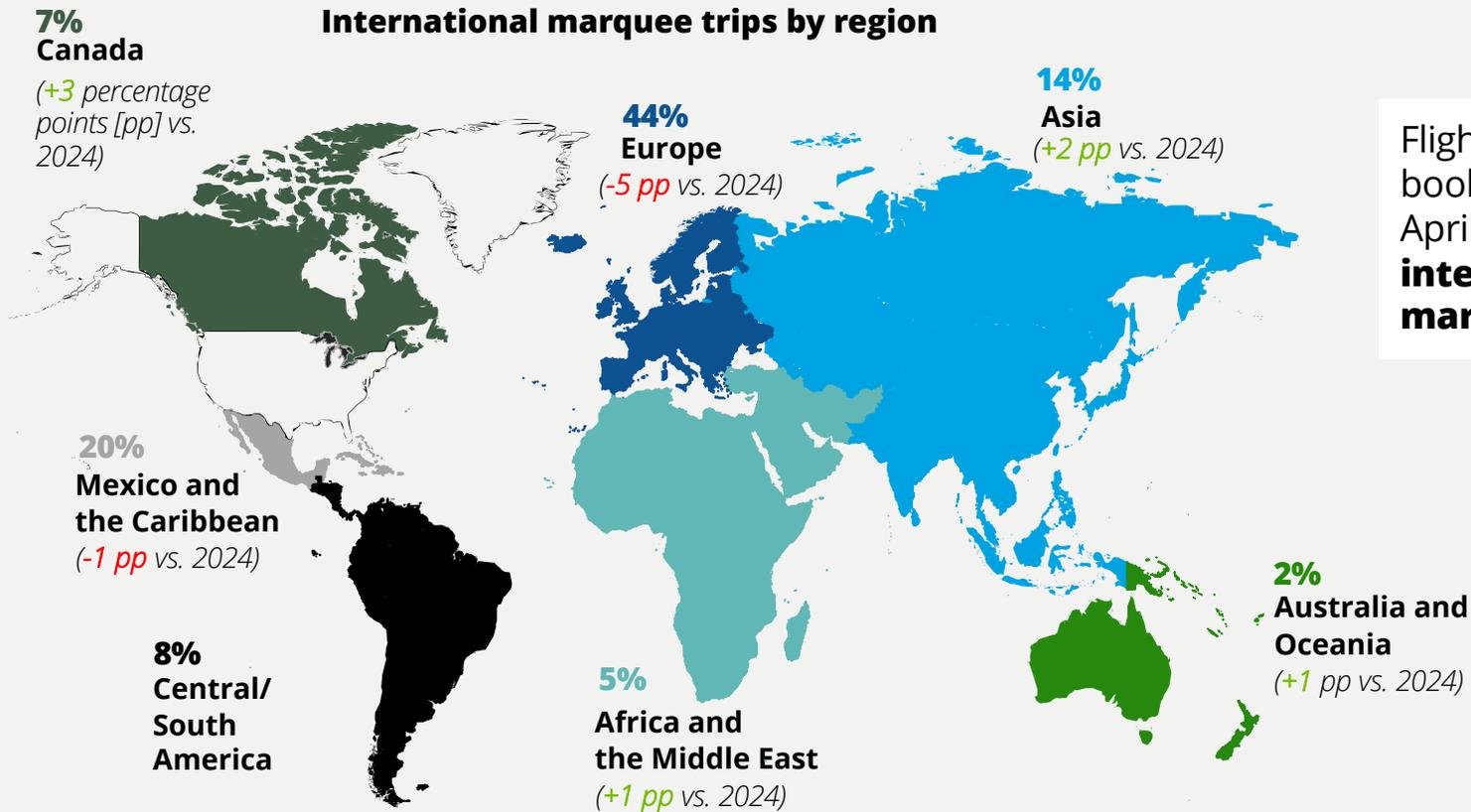
Questions: (1) Which transportation option(s) will you be using to reach your destination during this trip? Please select all that apply. (2) Which of the following best describes your flight? (3) Which best describes the airfare that you have booked/are planning to book?

Notes: n = 581 travelers flying on their longest trip; *where no change is noted, there was no change.

Source: 2025 Deloitte summer travel survey.

42% of air travelers plan to fly internationally on their longest trip, up from 38% in 2024

49% of international travelers surveyed in April had completed all their travel bookings and another 13% had booked their flight only

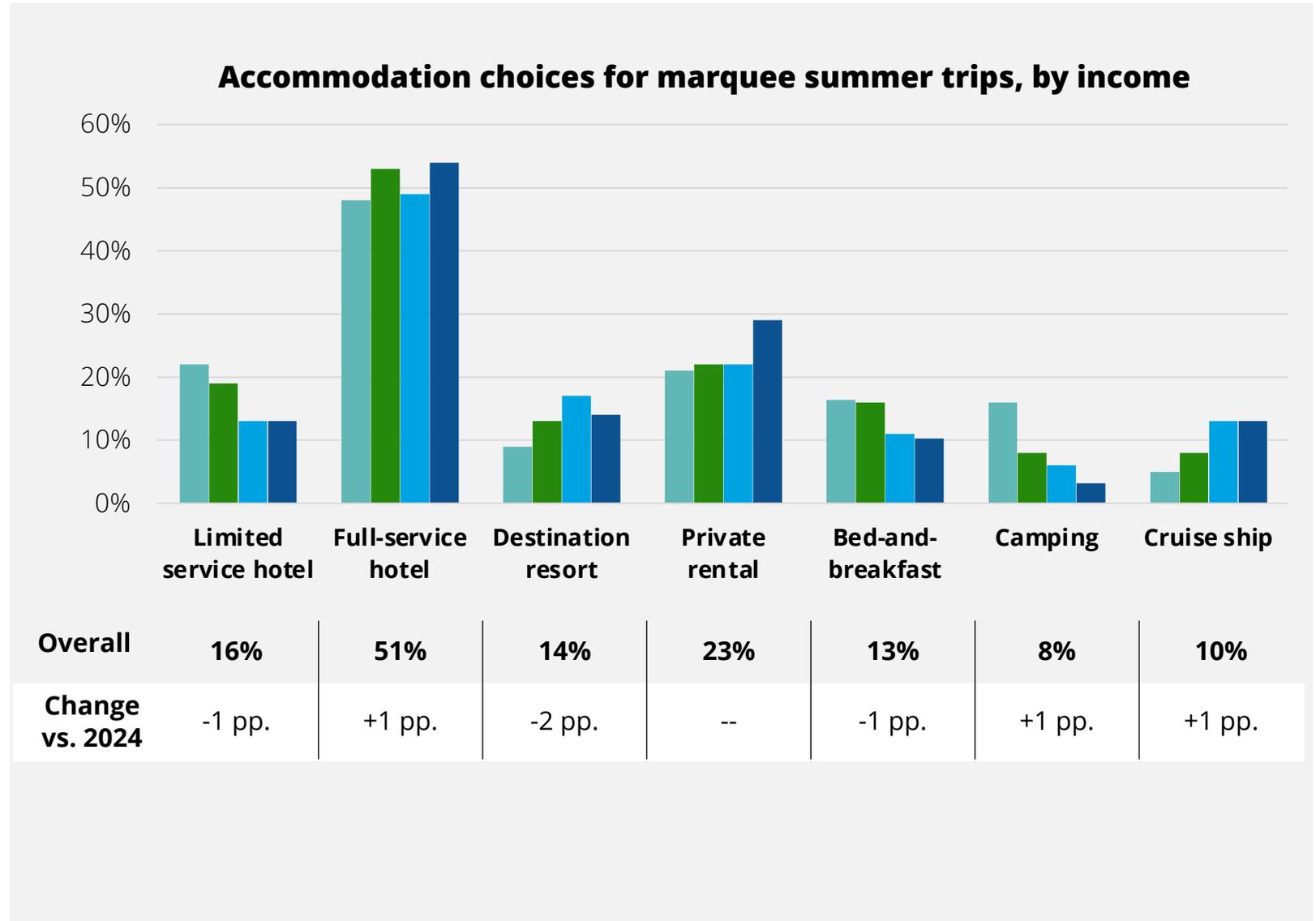


Flights were booked by early April for **62% of international marquee trips**

Question: Which international region will you be flying to?
Note: n = 245 planning to travel internationally on their longest trip of the season.
Source: 2025 Deloitte summer travel survey.

For marquee trips, private rental plans are led by high-income travelers

- Less than \$50K
- \$50K to \$100K
- \$100K to \$200K
- \$200K+



Question: Which type of lodging are you planning to stay at or considering for your longest trip of the summer? Select all that apply.

Notes: n = 1,064; pp. = percentage points.

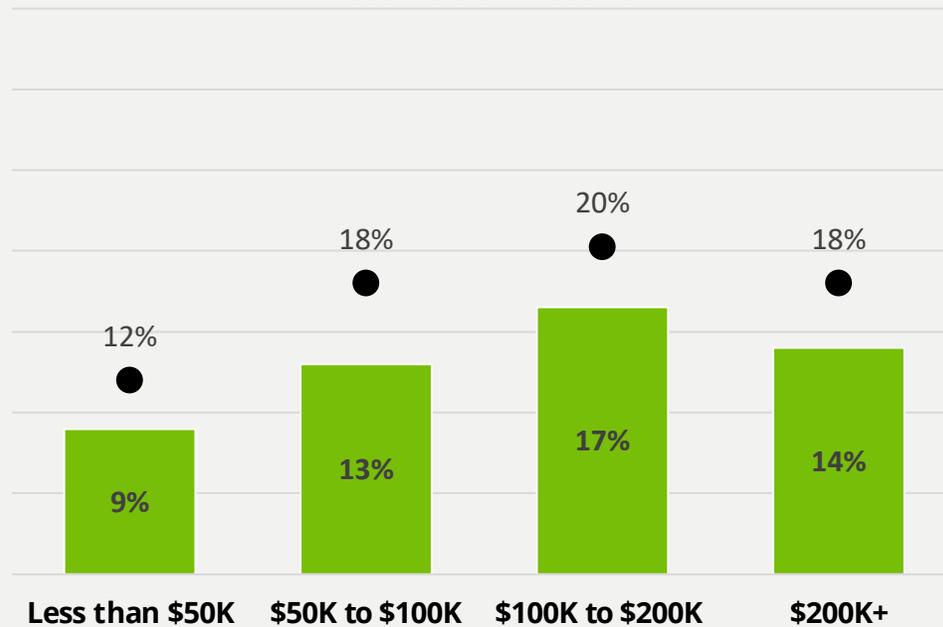
Source: 2025 Deloitte summer travel survey.

From March to April, travelers across income levels moved away from destination resorts. Private rentals may benefit from a shift in mindset among higher-income travelers.

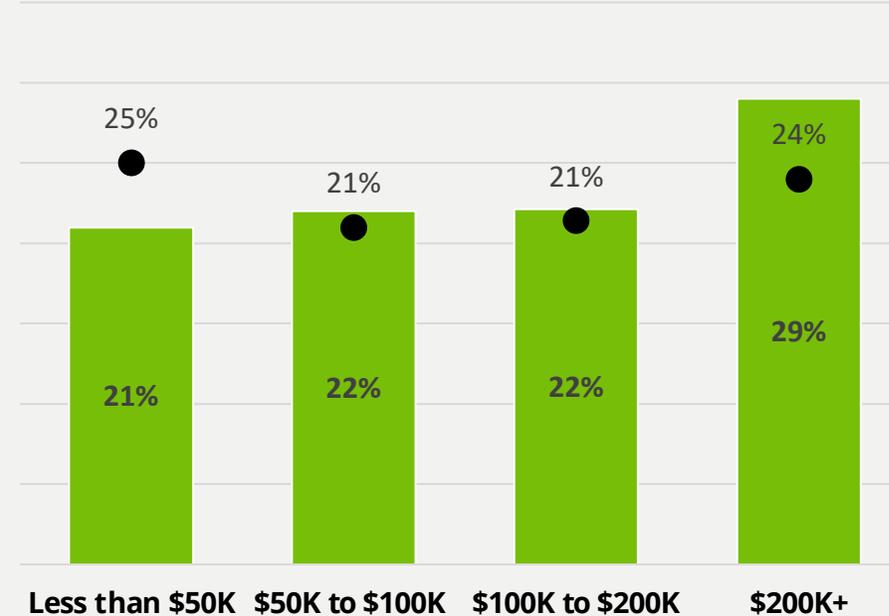
Marquee trip lodging intent, by income

■ 2025 April intent ● 2025 March intent

Destination resort



Private rental



Question: Which type of lodging are you planning to stay at or considering for your longest trip of the summer? Select all that apply.

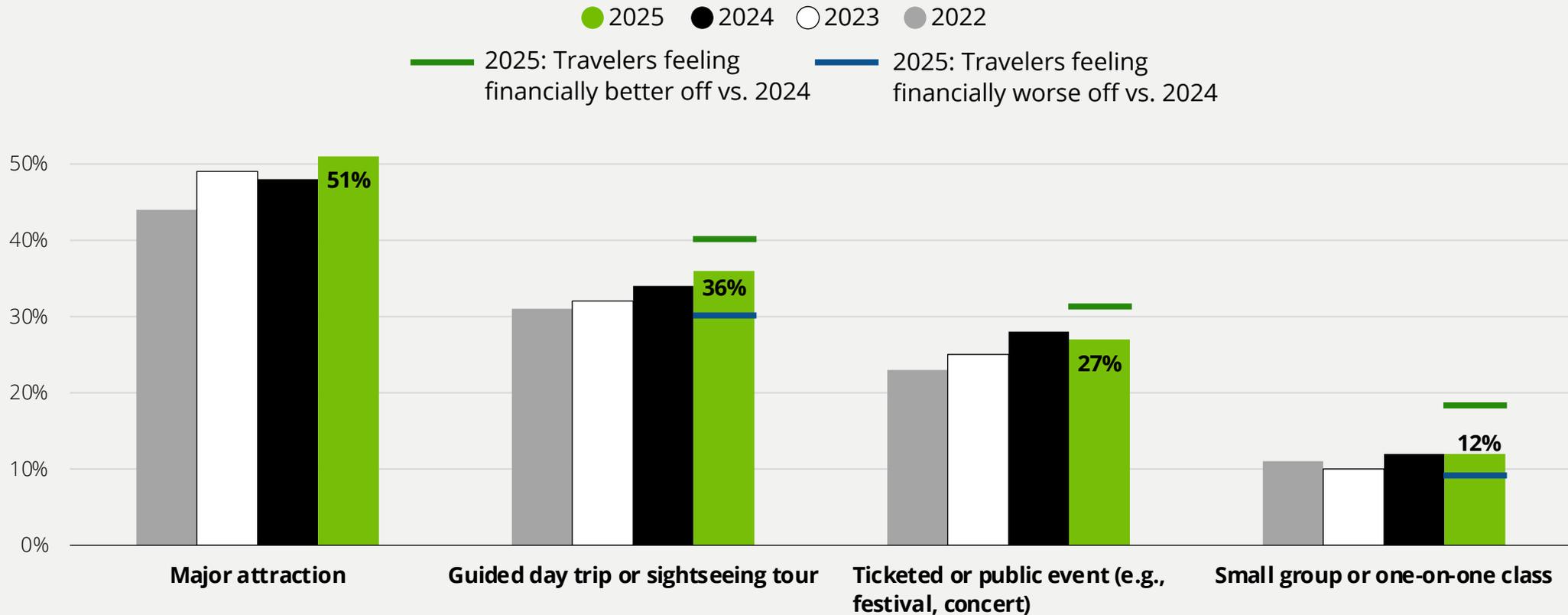
Note: n = 1,064.

Source: 2025 Deloitte summer travel survey.

A similar share of travelers plan to enjoy in-destination experiences during their marquee trips as in 2024

When travelers' in-destination spends shift, demand for guided tours and classes is most likely to fluctuate

Participation in in-destination travel activities among lodging travelers



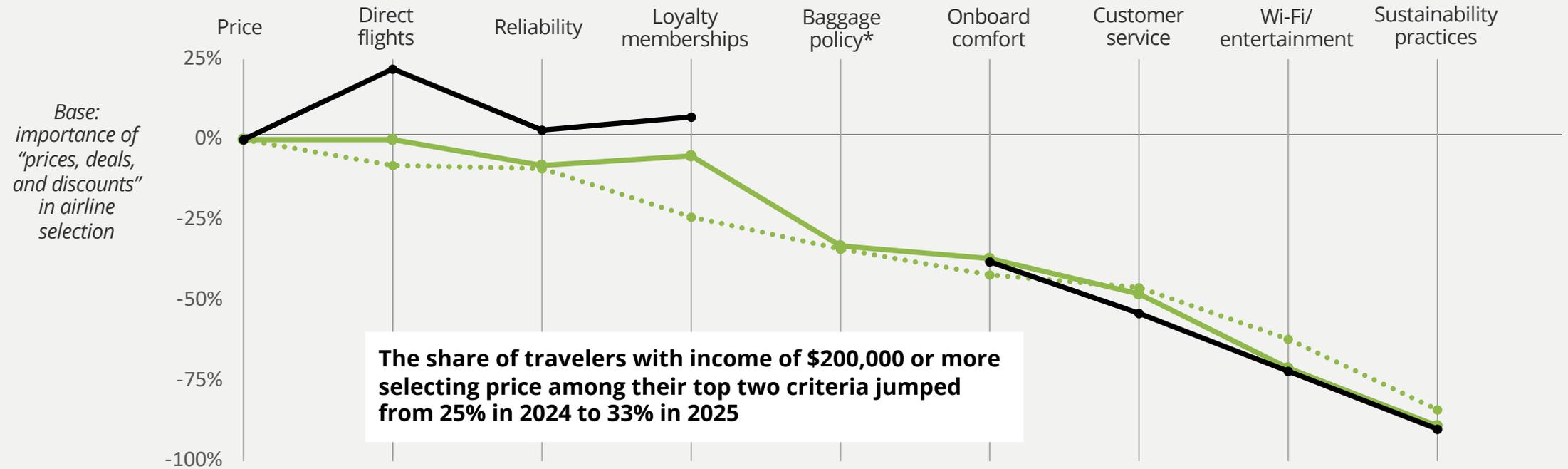
Question: Which of the following experiences are you likely to participate in on this trip? Select all that apply.
 Notes: n = 1,064; March incidence is only noted where there is a notable shift from March to April.
 Source: 2025 Deloitte summer travel survey.

Airline shopping: The highest-income travelers appear to have become more price sensitive, ranking airfare higher in their selection criteria than they did in 2024

The highest-income travelers still value loyalty memberships and direct flights more than others, but price has risen in importance

Importance of airline selection factors relative to price, by income

● 2025: Overall average ● 2025: Over \$200K ● 2024: Over \$200K



Question: Which of the following factors are most important to your airline selection for this trip?

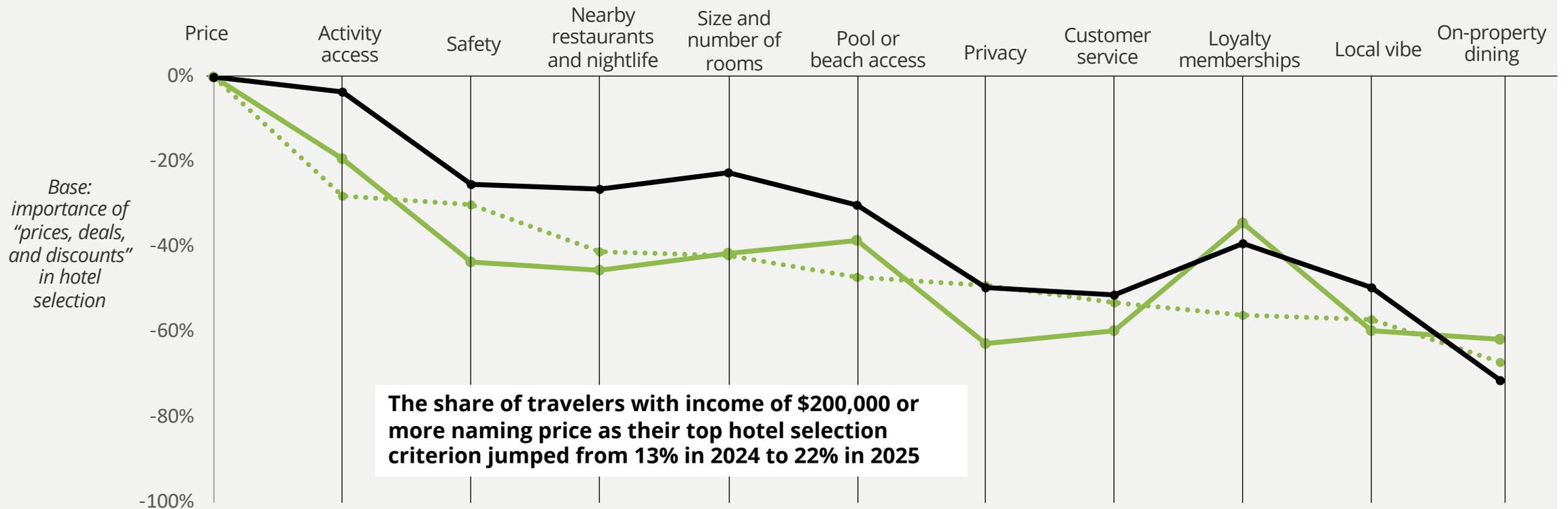
Notes: n = 581; *baggage policy was added as an option in 2025.

Source: 2025 Deloitte summer travel survey.

Hotel shopping: The highest-income travelers appear to have become more price sensitive, weighing room rates more heavily in their choices than in 2024

Importance of lodging selection factors in relation to price, by income

● 2025: Overall average ● 2025: Over \$200K ● 2024: Over \$200K



Question: Which of the following factors are most important to your lodging selection for this trip?

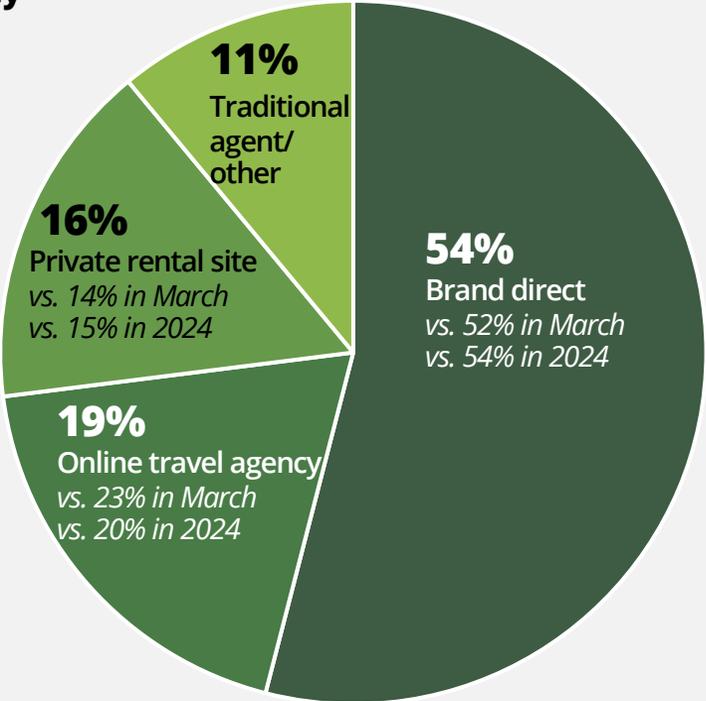
Note: n (travelers booking hotels, resorts, and rentals) = 902.

Source: 2025 Deloitte summer travel survey.

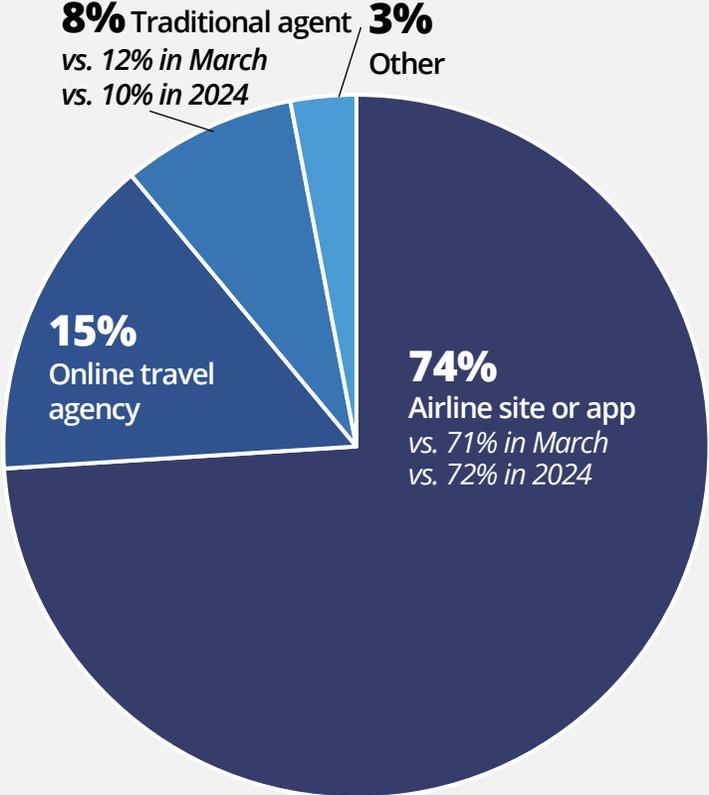
Adjustments to travel plans appear to have led to small shifts in marquee trip booking channels

A rise in rental interest caused some changes to lodging booking channels. And with some scaling back flight plans (especially switching from international to domestic), there is some movement from traditional agent bookings to airline direct.

Lodging booking channel, April 2025 survey



Air booking channel, April 2025 survey



Question: Which channel did you or do you plan to use to book your lodging/flight for this trip?
Notes: n = 902 travelers plan to book lodging; n = 581 travelers plan to book flights.
Source: 2025 Deloitte summer travel survey.

Travel trends in brief

Luxury, tech, sustainability, and remote work



What is a luxury property? Respondents say extraordinary location, exceptionally comfortable rooms, and impeccable service stand out, but opinions vary across generations.

Attributes that make hotels luxurious (top two selections)

<p>Extraordinary location: 36%</p> <ul style="list-style-type: none"> • Boomers: 45% • Gen X: 39% • Millennials: 30% • Gen Z: 30% 	<p>Level of service: 34%</p> <ul style="list-style-type: none"> • Boomers: 45% • Gen X: 37% • Millennials: 30% • Gen Z: 19% 	<p>Luxury spa, pool, or fitness center: 20%</p> <ul style="list-style-type: none"> • Boomers: 5% • Gen X: 24% • Millennials: 21% • Gen Z: 36% 	<p>Brand name: 18%</p> <ul style="list-style-type: none"> • Boomers: 13% • Gen X: 25% • Millennials: 20% • Gen Z: 4%
<p>Room comfort: 35%</p> <ul style="list-style-type: none"> • Boomers: 39% • Gen X: 30% • Millennials: 32% • Gen Z: 45% 	<p>Design/visual appearance: 25%</p> <ul style="list-style-type: none"> • Boomers: 27% • Gen X: 17% • Millennials: 35% • Gen Z: 19% 	<p>Available experiences: 14%</p> <ul style="list-style-type: none"> • Gen Z: 21% • Boomers: 10% 	<p>On-property dining: 9%</p> <p>Gen Z: 15%</p>

Generational callouts

Boomers: Settle solidly on the three attributes that win out overall—extraordinary location, room comfort, and service

Gen Xers: Associate brand names with luxury more than any other generation

Millennials: Seek exceptional design

Gen Zers: Place higher emphasis on the comfort of the room and a spa, pool, or fitness center

Question: Thinking of the most luxurious lodging you have stayed in the past two years, which two attributes of the property did you feel most contributed to its luxuriousness?

Note: n (respondents in the \$150K+ income group who have stayed at a property they consider luxurious in the past two years) = 353.

Source: 2025 Deloitte summer travel survey.

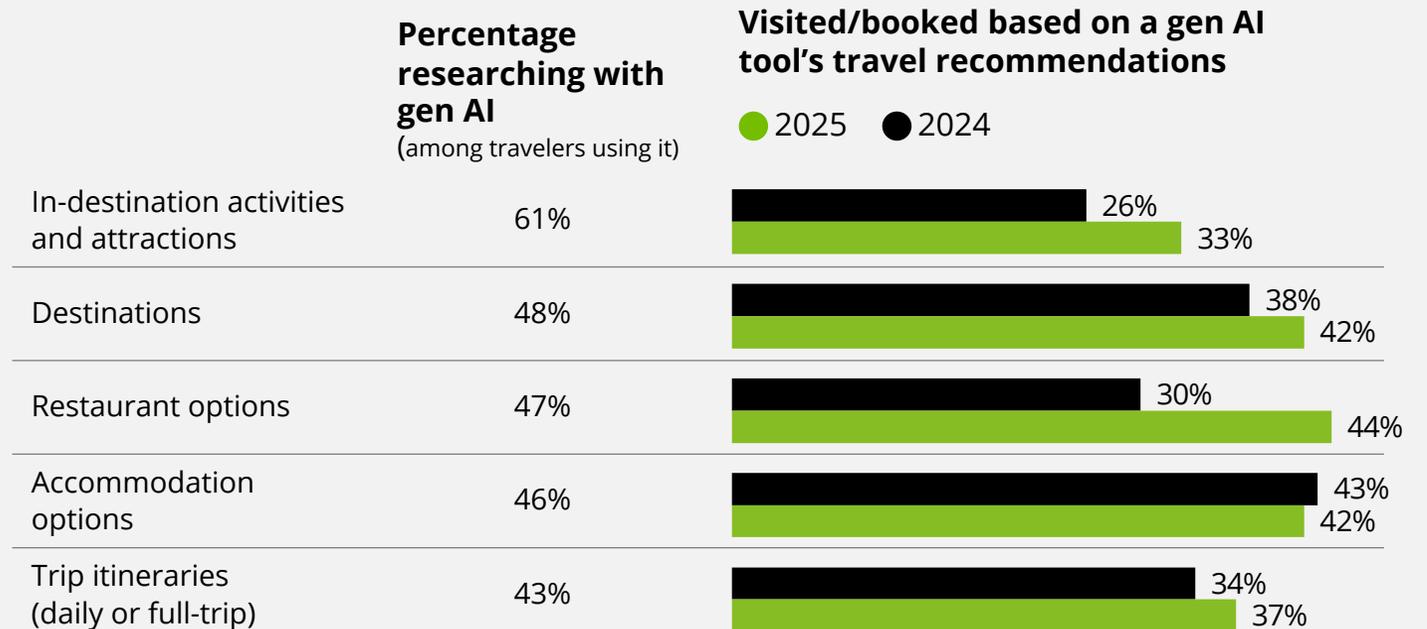
Generative AI's use in travel planning continues to grow and evolve

Usage is growing, with Gen Z catching up to millennials and Gen X usage doubling versus 2024

Percentage of travelers using gen AI in trip planning

	2024	2025
Overall	10%	15%
Gen Z	13%	23%
Millennials	17%	23%
Gen X	7%	13%
Boomers	5%	6%

More travelers say they have followed through on gen AI travel recommendations



Questions: (1) Which of the following do you use for travel inspiration and information? Please select all that apply. (2) How have you used gen AI tools in travel discovery or planning? Please select all that apply. (3) Which, if any, actions have you taken based on a gen AI tool's travel recommendations?
 Notes: n = 270; totals may not add to 100% due to rounding.
 Source: 2025 Deloitte summer travel survey, March fielding.

Gen Zers surveyed report the most effort to travel sustainably, but clear and concrete action is limited

Factoring in sustainability ratings when making supplier choices is the most widely adopted sustainability measure across generations

Question: Which of the following do you try to do when you travel? Please select all that apply.
 Note: n = 1,794.
 Source: 2025 Deloitte summer travel survey, March fielding.

Percentage saying they try to follow sustainable travel practices

	Gen Zers	Millennials	Gen Xers	Boomers
Prioritize hotels, rentals, and airlines with higher sustainability ratings	38%	29%	26%	16%
Filter search for more sustainable lodging options	17%	21%	12%	6%
Filter search for lower-emission flights	12%	12%	4%	1%
Pay to offset flight's carbon emissions	11%	9%	5%	2%
Avoid flying due to environmental impact	12%	10%	5%	4%

23% of travelers surveyed plan to work during their longest trip this summer, up slightly from 2024

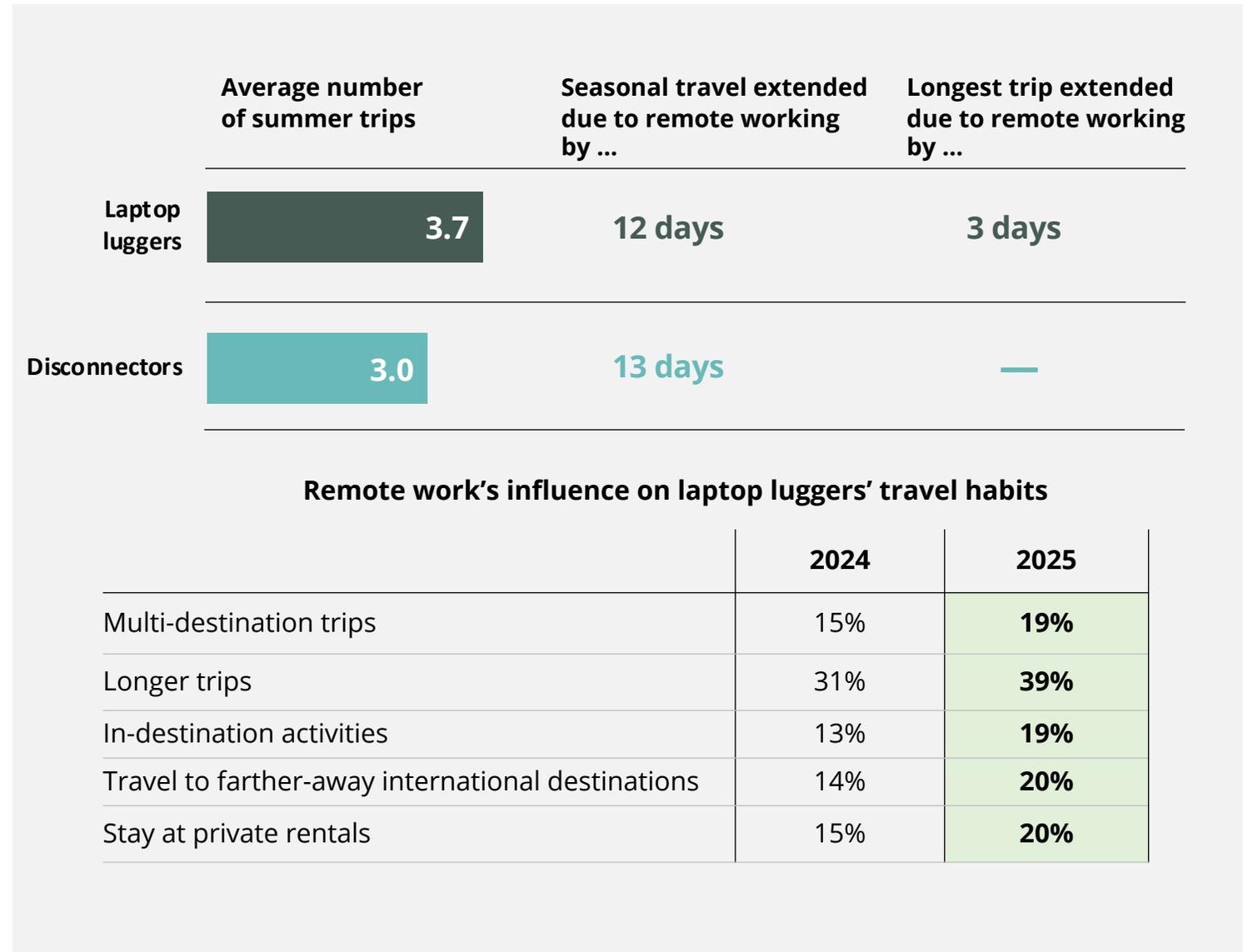
Millennials and higher-income travelers are engaging in laptop lugging the most

Gen Z	25%
Millennials	34%
Gen X	22%
Boomers	12%
Under \$50K	17%
\$50K to \$100K	24%
\$100K to \$200K	21%
Over \$200K	29%

Questions: (1) Do you plan to work during this trip? (2) How many leisure trips will you be taking this summer season? (3) How many days are you adding to the season and this trip because of the ability to work remotely? (4) How has remote work affected your travel habits? Select all that apply.

Notes: n for questions 1, 2, and 3 (laptop luggers) = 240, n (disconnectors) = 488 as of March 2025; n for question 4 (laptop luggers) = 472, n (disconnectors) = 778 as of April 2025.

Source: 2025 Deloitte summer travel survey.



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Thank you

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Deloitte Consumer Industry Center

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