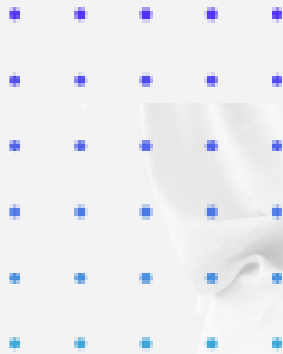


 MORNING CONSULT®

2026 Summer Travel Outlook



Key takeaways

Bottom line: At a high level, the current economic environment appears to pose a threat to summer travel spending: consumer sentiment has fallen in four straight months, and rising gas prices have introduced a pronounced financial anxiety directly tied to travel. However, **travel intent and spending data paints a more positive picture for the industry than the macro conditions otherwise imply.**

Morning Consult data shows consumers remain committed to traveling this summer and expect to spend more across nearly every category. Recent spending data backs up this robust intent, with hotel and airfare outlays climbing throughout the spring. **What emerges is a more cost-conscious consumer than we've seen in recent summers, but one that's maintaining travel as a priority.**

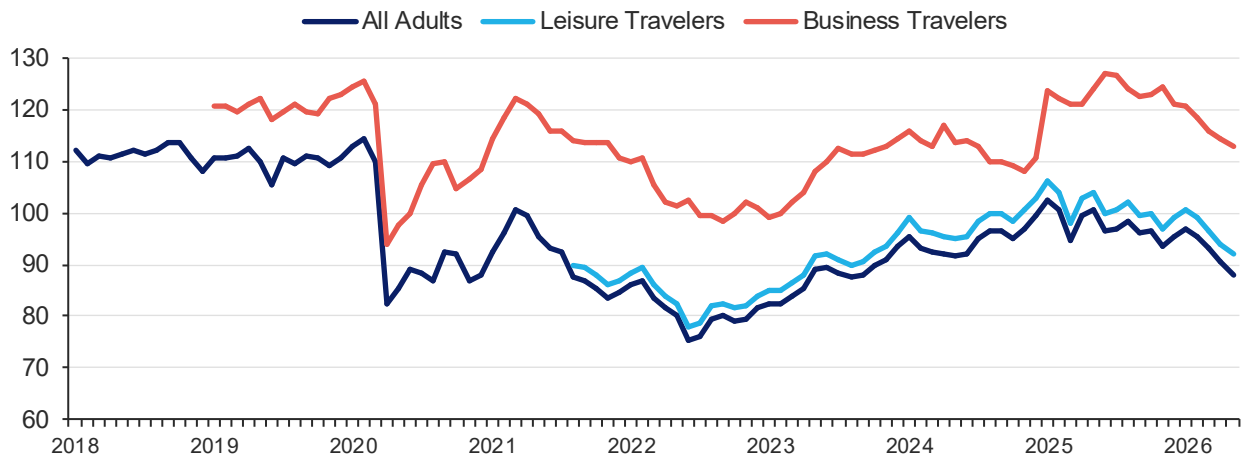
- 1. Intent is outrunning sentiment.** Consumer sentiment has slid four straight months to 88.1, its lowest since mid-2023. Yet leisure travel intent climbed every month this spring, and business travel is following a similar upward trajectory. Travelers aren't waiting for the macro picture to clear before they book.
- 2. Spending is already moving.** Self-reported spending on hotels and airfare hit series highs in April, and travelers expect to spend more this summer across nearly every category — led by gas (net +36), hotels (+20), and dining (+16). Millennials, Gen Z, and higher-income households are driving the lift.
- 3. Gas prices are the pressure point.** 70% of U.S. adults cite rising gas prices as the highest-rated summer travel concern — well above general budget worries (59%) — and 53% say gas has already led them to scale back trips. The squeeze falls hardest on lower- and middle-income households.
- 4. The booking window is still open.** 43% of summer travelers have already booked at least part of their trip and 31% plan to book in the weeks ahead, but 26% remain undecided.
- 5. AI is becoming a real travel-planning channel.** More than half of U.S. adults are already using or open to AI tools for every travel-planning task tested, with adoption concentrated among the younger, higher-income households that are spending more on travel.

Sentiment is sliding — but travelers appear undeterred

Consumer sentiment has now fallen for four consecutive months. The Index of Consumer Sentiment for all U.S. adults stood at 88.1 in May 2026, well below the 100 baseline and the lowest reading since mid-2023. Leisure (91.9) and business travelers (113.0) remain measurably more confident than the broader population, as they consistently have been — but both segments have also been on a steady decline since the start of the year.

U.S. consumer sentiment among travelers has slid for four straight months

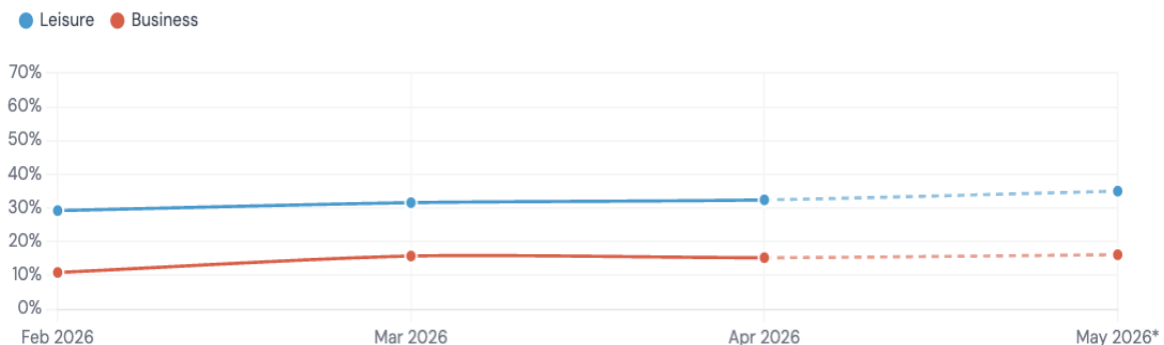
Monthly Index of Consumer Sentiment readings, Jan 2018 – May 2026 (baseline = 100).



Despite the softening confidence backdrop, travel intent has climbed every month since February. Leisure travel intent has risen 5.8 points to 35% in May 2026 — a year-to-date high. Business travel intent has risen at a similar pace. The takeaway for brands: travelers are not waiting for the economy to stabilize before they book.

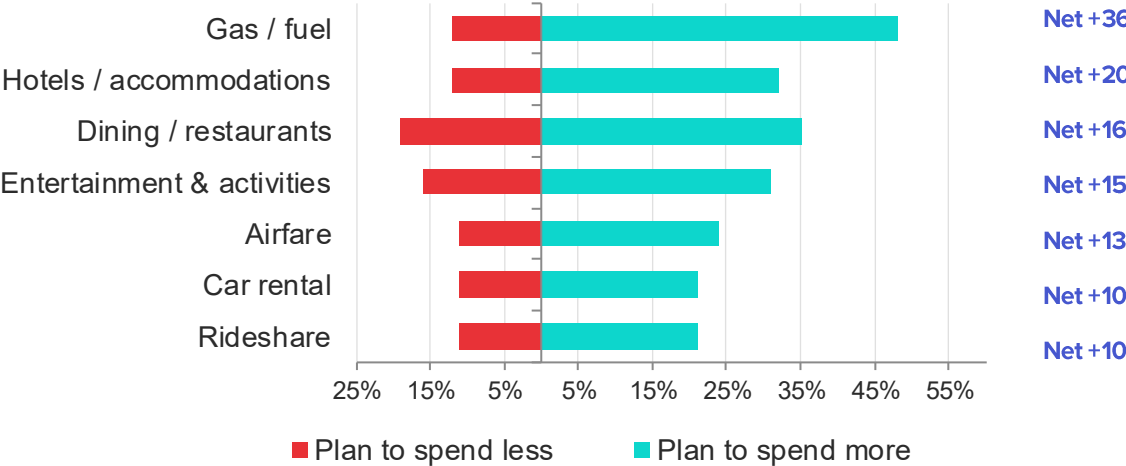
Travel intent is up in May

% of all U.S. adults planning to travel within the next 3 months (< 1 month + 1–3 months from now)



Travelers expect to spend more this summer – and already are this spring

Rather than avoid consumption and potential costs, travelers are bracing to spend more across virtually every travel category this summer than they did last year— gas leads the increases (net +36), followed by hotels (+20), dining (+16), and entertainment (+15).



And it isn't just intent: self-reported spending on hotels and airfare has surged through the spring, reaching series highs in April. This trend holds even when adjusting for inflation. Millennials, Gen Z and higher-income households are the primary drivers in both categories. The category remains a top-priority discretionary spend, even as households pull back elsewhere.

Hotel and airfare spending reached series highs in April 2026

Nominal average monthly U.S. consumer spending on hotels and airfare, May 2022 – April 2026 (USD).

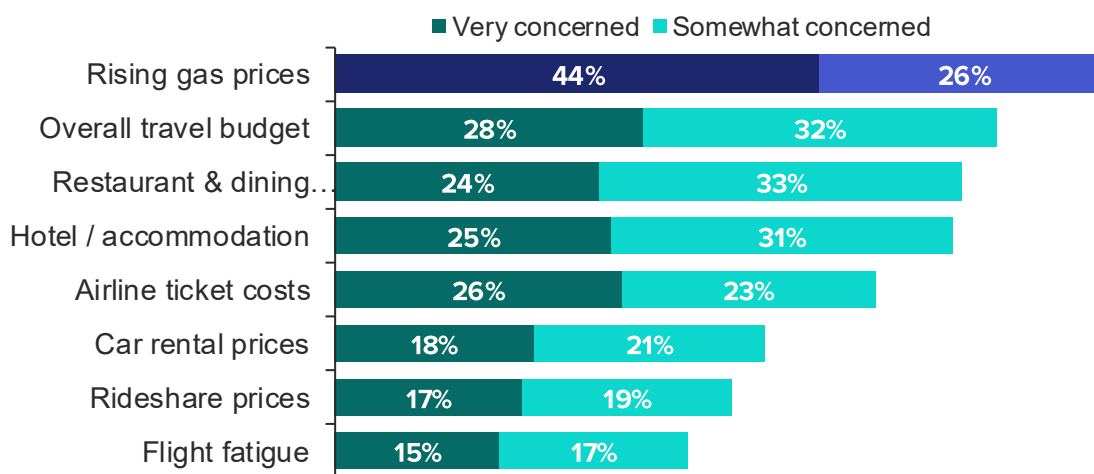


Gas prices are the dominant concern by a wide margin

Asked what concerns them most about summer travel, 70% of U.S. adults cite rising gas prices — the highest reading of any concern measured. Travel-budget worries (59%) and dining costs (57%) round out the top three. Notably, all category-specific cost concerns (hotel, airfare, car rental, rideshare) sit below the broader budget and dining concerns — pointing to a generalized cost squeeze rather than discomfort with any single travel category.

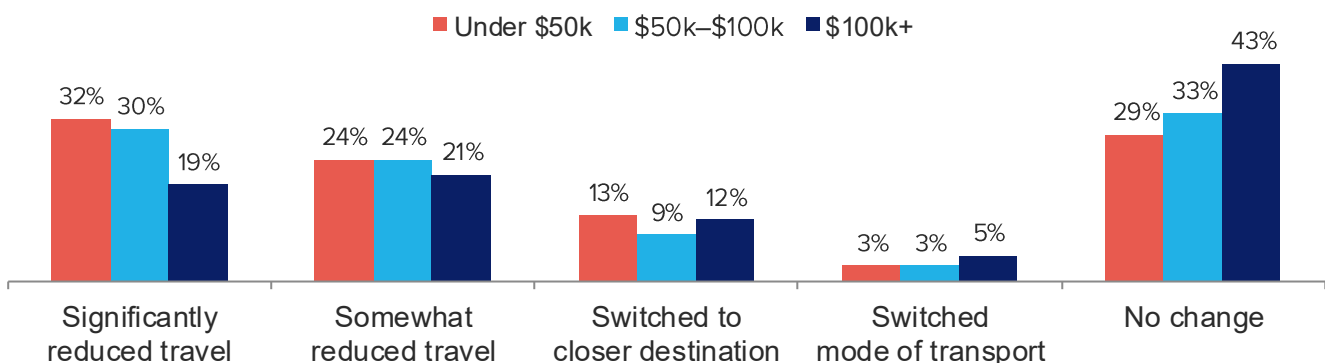
Gas prices top the list of summer travel concerns by a wide margin

% concerned about each item when thinking about summer travel.



More than half of U.S. adults (53%) say rising gas prices have already led them to reduce summer travel — 29% “significantly” and 23% “somewhat.” Another 12% are switching to closer destinations. Only about a third (32%) say their plans are unaffected. The income skew is sharp: Lower- and middle-income travelers are absorbing the squeeze; higher-income travelers are largely shrugging it off.

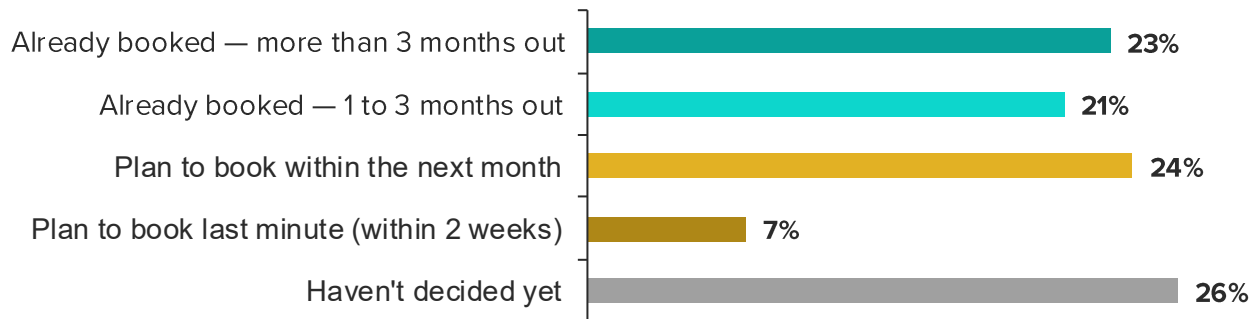
Impact of gas prices on summer travel plans, by household income



The booking window is still open — and the choice mix is shifting

As of late April, 43% of U.S. summer travelers had already booked at least some portion of their summer travel, with about half of those booking more than three months in advance. Another 31% plan to book in the weeks ahead — and 26% remain undecided. That undecided cohort is the operative one for late-spring and early-summer marketing: it is large, late, and disproportionately price-sensitive.

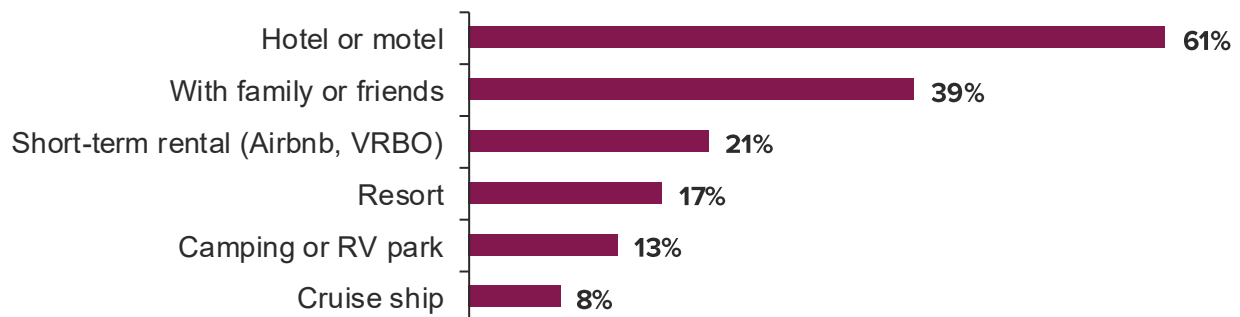
Nearly half of summer travel is already booked — but a quarter remains undecided



Where travelers plan to stay reinforces the value-conscious posture of this summer. Hotels remain the dominant choice — 61% of summer travelers plan to use one at some point — but staying with family or friends comes in second at 39%, ahead of short-term rentals (21%), resorts (17%), and camping or RV (13%). Each of these informal and non-traditional options draws a sizable share of travelers in its own right, a meaningful structural shift from pre-pandemic norms.

Hotels remain the default stay

% of summer travelers planning to use each option (multi-select).

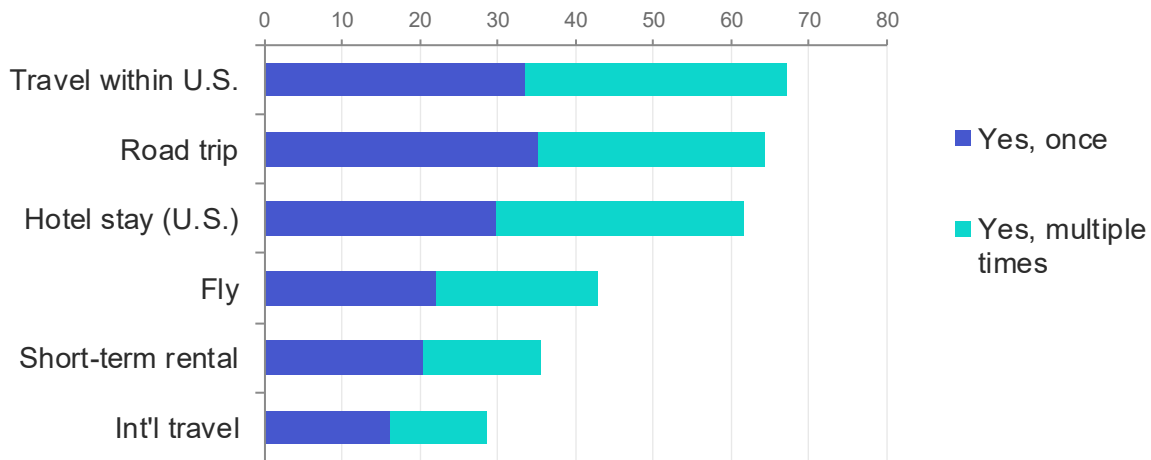


Most summer travel is domestic, and road trips remain popular despite gas prices

67% of U.S. adults plan to travel within the U.S. this summer; 64% plan a road trip. International travel (29%) skews heavily toward younger, higher-income adults. Vacationing with a partner or small group (22%) and family/large-group travel (19%) are the two dominant trip motivations, together representing 41% of summer trip purposes.

Summer travel plans

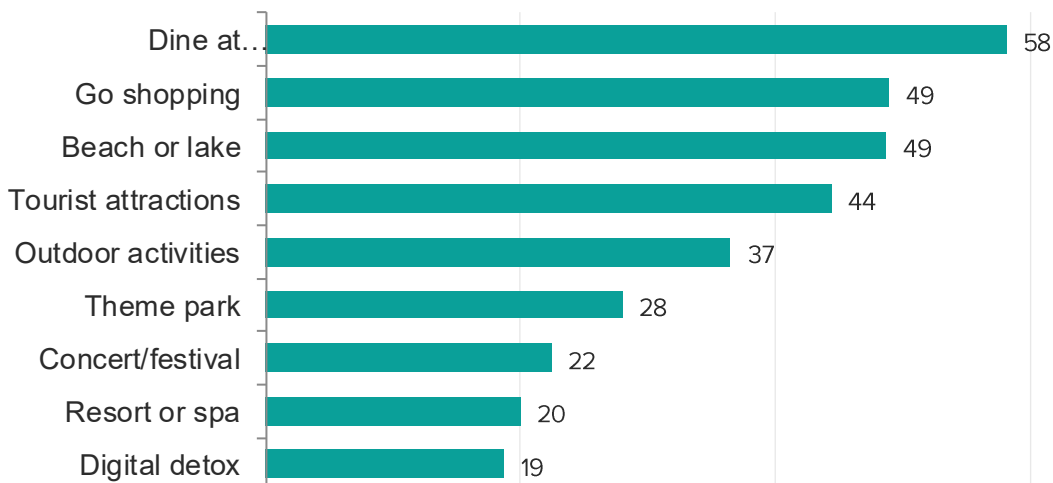
% planning to do each at least once this summer



Dining at local restaurants (58%) and shopping (49%) top the activity list. More experiential activities, such as concerts and digital detoxes, are less popular.

Planned activities on summer trips

% of travelers planning each; select all that apply



AI use for travel planning is poised to rise

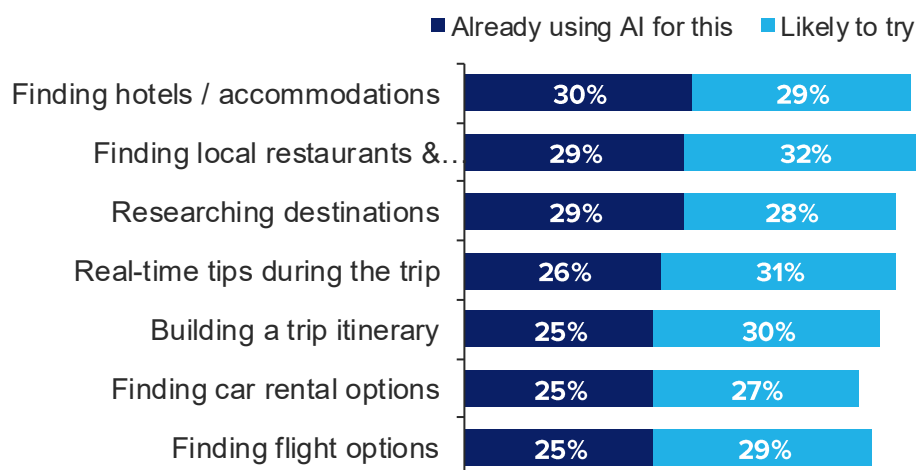
Roughly one in four U.S. adults already uses AI tools — ChatGPT, Gemini, and the like — for travel planning, and a roughly equal share who aren't currently using AI say they're likely to try.

Combined, that puts more than half of U.S. adults in the receptive camp for every single travel planning task tested.

Hotel research, restaurant and activity discovery, and destination research lead. Flights and car rentals lag slightly — both task categories where established platforms remain the default — but even there, more than half are using AI or open to trying it. Adoption skews young and affluent: 31–41% of \$100k+ households are already using AI for travel planning, about 1.5 times the rate of households under \$50k.

A majority of U.S. adults are already using or open to AI for travel planning

% of U.S. adults by current use and openness to AI tools for each task.



Millennials are the heaviest current users overall, leading or tying Gen Z on five of seven tasks tested. Gen Z over-indexes on the most exploratory use cases — researching destinations (41%) and car rentals (35%) — suggesting AI is becoming a default starting point for the early-stage discovery work that used to start with Google or TripAdvisor.

Income reinforces the pattern: 31–41% of \$100k+ households are already using AI for travel planning, about 1.5 times the rate of households under \$50k. AI travel planning currently skews young and affluent — the same cohort that is least affected by gas prices and most likely to take an international trip this summer.

Methodology and sources

Summer 2026 Travel Custom Survey

Custom Morning Consult survey of a nationally representative sample of 2,003 U.S. adults, fielded April 28–30, 2026. Margin of error is +/- 2 percentage..

Travel & Hospitality Tracker in Morning Consult Intelligence

Morning Consult's monthly tracker of travel intent, recent activity, and provider trust, covering approximately 2,000 U.S. adults per month. Data shown is from the February 2026 through May 2026 waves. The May 2026 wave is partial as of this writing.

Index of Consumer Sentiment (ICS)

Morning Consult's composite measure of U.S. consumer confidence, based on over 5,000 daily surveys. Figures shown are monthly readings from January 2018 through May 2026. Traveler segments are based on respondents' reported travel behavior over the prior year.

U.S. Consumer Spending tracker

Morning Consult's monthly tracker of U.S. household self-reported spending and spending allocation across categories, fielded among a representative sample of approximately 8,200 U.S. adults per month. Hotel and airfare values shown are monthly average category spend, May 2022 – April 2026.

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