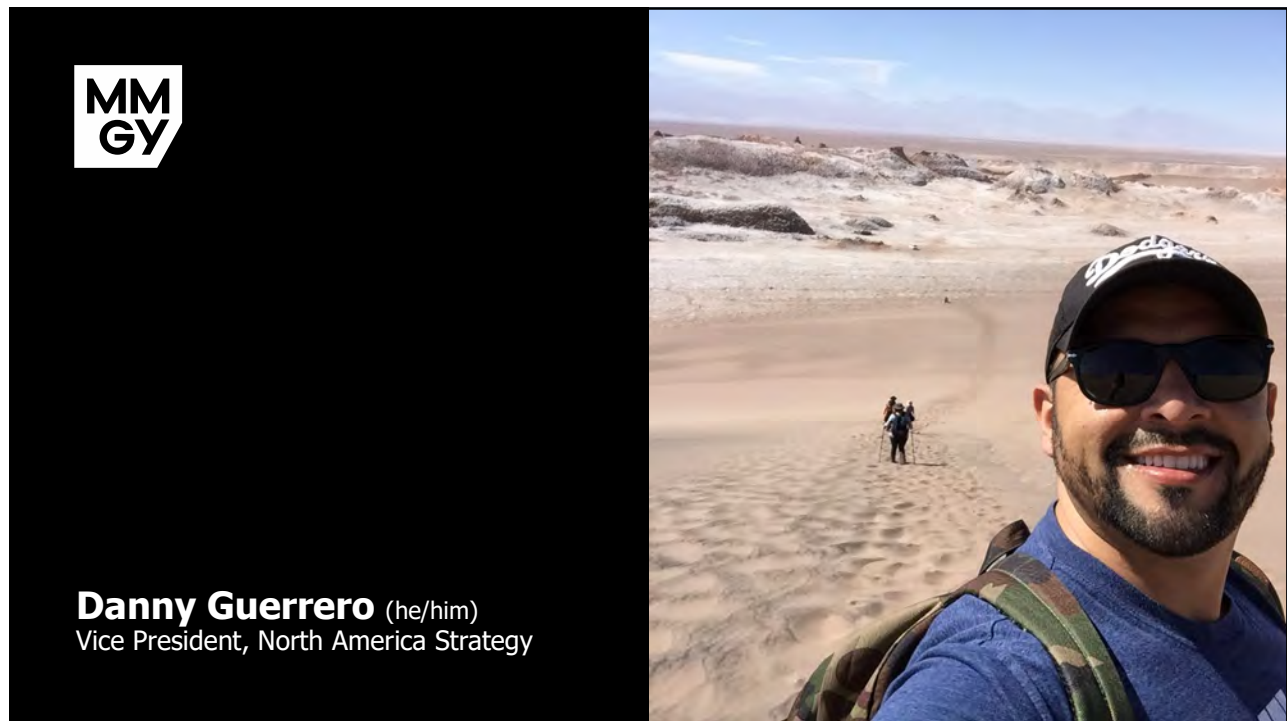




1



2

The world's largest integrated marketing
company specializing in
travel, tourism and hospitality.



3



*We revolve around
travel.*



4

Better insights. Smarty Strategy.

MMGY Travel Intelligence specializes in syndicated and custom market research exclusively for the travel and tourism industry. It boasts the industry's most expansive and richest historical data, and it is dedicated to providing the highest-quality travel and traveler research.

MMGY's mission is to provide its clients with valuable insights they can apply to improve their results. Its portfolio of products and services is designed to power travel industry decision-makers through consumer insights, travel performance data, and audience modeling and segmentation.



5

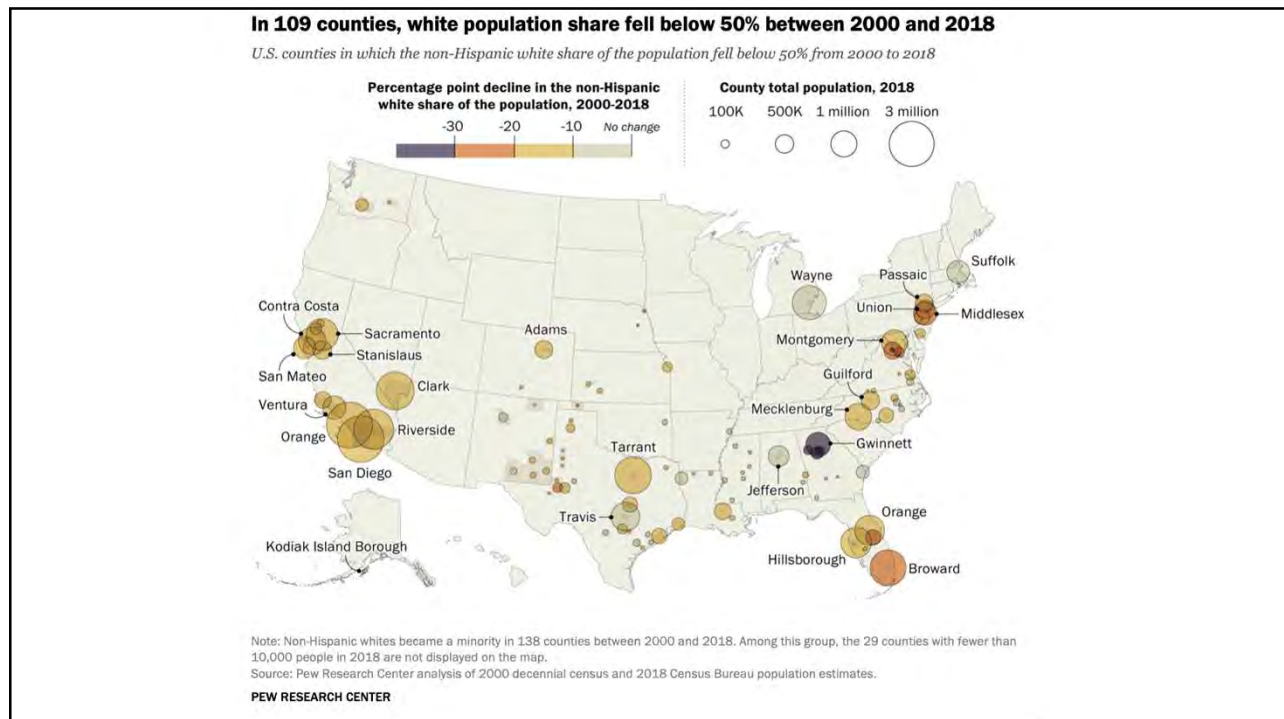
Intelligence



6

An Emerging America

7



8

44% of the U.S. population is projected to be multicultural by 2030.

U.S. Census 2020

MMGY Travel Intelligence

9



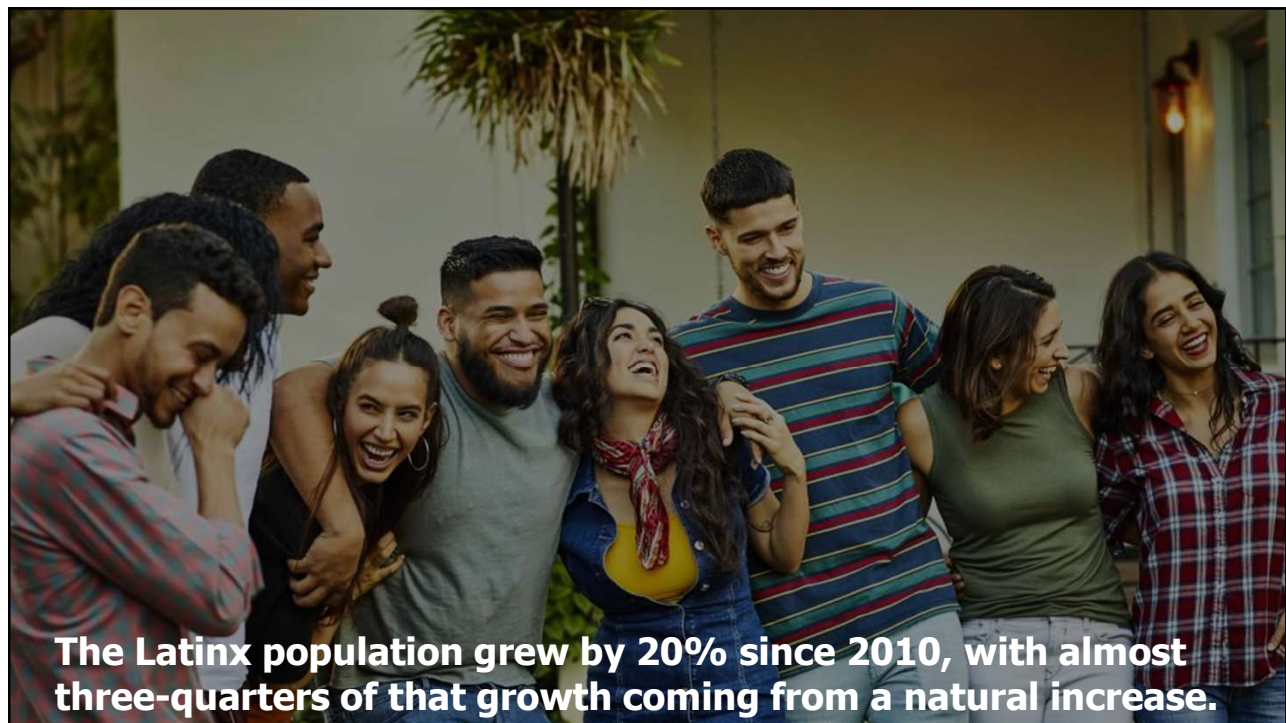
5.6% of United States adults identify as LGBT in 2021, up from 3.5% in 2012. Younger generations are increasingly fluid when it comes to sexual orientation.

10



Asians had the biggest growth rate of any demographic group, increasing by almost 30% over the past decade. Almost two-thirds of that growth was driven by international migration. *

11



The Latinx population grew by 20% since 2010, with almost three-quarters of that growth coming from a natural increase.

12



The Black population grew by almost 12% over the decade.

13

The Power of Multicultural Travelers

14



15



16

1

Diverse travelers are awakening to the power of global travel and self fulfillment.



17

/ Diversity in Travel



47%

of U.S. leisure travelers are influenced by a destination that offers diverse cultural experiences that reflect their own culture.



Gen Z: 49%

Millennials: 61%

Gen X: 46%

Boomers: 38%

Black: 63%

Latinx: 54%

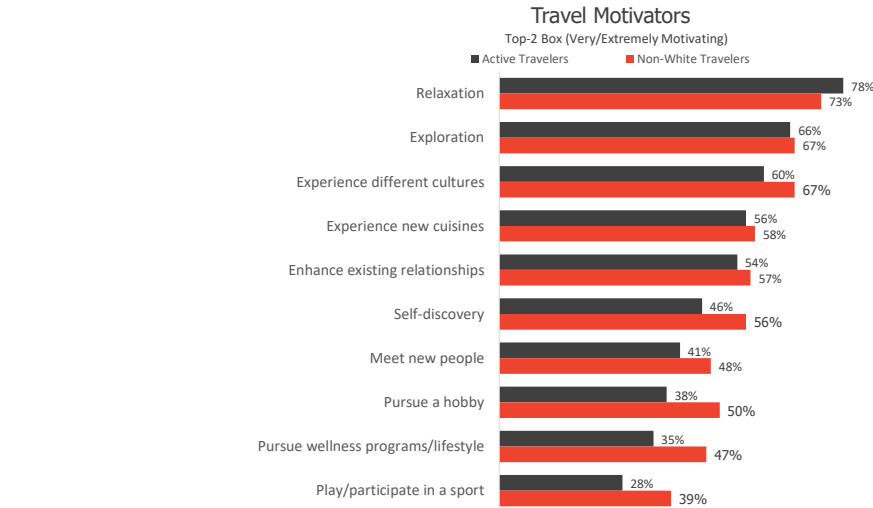
18

18

/ Diversity in Travel: Motivation to Travel



Non-White Travelers Are More Motivated To Travel Than Travelers in General by Experiencing Different Cultures, Self-Discovery, Pursuing a Hobby, Wellness Programs and Participating in a Sport



Base: Active leisure travelers (n=3,937), Non-White Travelers (n=906)
Source: MMGY Global's 2021 *Portrait of American Travelers*® Summer Edition

Question/ Please indicate the degree to which each of the following factors motivates you to travel for vacations.

19

/ Diversity in Travel: Motivation to Travel



LGBTQ+ Travelers Are More Motivated To Travel Than Active Travelers in General by Self-Discovery, Pursuing Wellness Programs or a Hobby and Participating in a Sport



Base: Active leisure travelers (n=3,937), LGBTQ+ Travelers (n=467)
Source: MMGY Global's 2021 *Portrait of American Travelers*® Summer Edition

Question/ Please indicate the degree to which each of the following factors motivates you to travel for vacations.

20

2

Social justice movements, racial and gender inequity are casting a light on perceived inequities in travel.

MM
GY Travel
Intelligence

21

/ Diversity in Travel

MM
GY Travel
Intelligence

42%

of U.S. leisure travelers are more aware of racial, ethnic, sexual and physical inequity when it comes to travel than they were 2 years ago.



Gen Z: 51%

Millennials: 58%

Gen X: 39%

Boomers: 30%

Black: 60%

Indigenous: 57%

LGBTQ+: 52%

Latinx: 51%

22

Base: Active leisure travelers
Source: 2021 Portrait of American Travelers

22

/ Diversity in Travel



% Agree: I Have Felt Unwelcome in Destinations That I Have Visited



23

23

3

Equitable representation becomes a priority for younger generation and diverse travelers.



24

/ Diversity in Travel



Diverse Representation in Travel Advertising Has An Impact

% Agree: I am more likely to visit a destination if I see racial, ethnic, sexual or physical diversity represented in their advertising.



25

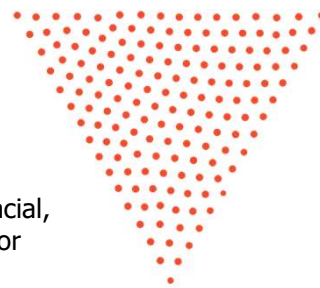
25

/ Diversity in Travel



33%

of U.S. leisure travelers are influenced by a destination's racial, ethnic, cultural, gender, sexual or accessible diversity and/or inclusiveness.



Gen Z: 49%	Indigenous: 61%
Millennials: 54%	Black: 57%
Gen X: 39%	LGBTQ+: 50%
Boomers: 23%	Latinx: 48%
	Asian: 48%

26

Base: Active leisure travelers
Source: 2021 Portrait of American Travelers

26

4

Concerns of safety and feeling welcome emerge as barriers to equitable and inclusive travel for a variety of groups.



27

/ Diversity in Travel




% Agree: I Feel Like I Have To Be More Aware Of My Surroundings Than Most When Traveling Because Of My Identity, Cultural Background, Heritage Or Lifestyle



28

28




The Black Traveler

Insights, Opportunities & Priorities

BLACK TRAVEL ALLIANCE NCBMP NABHOOC MMGY Travel Intelligence

29



The Black Traveler

Insights, Opportunities and Priorities

Over \$100,000 Raised To Fund Grants

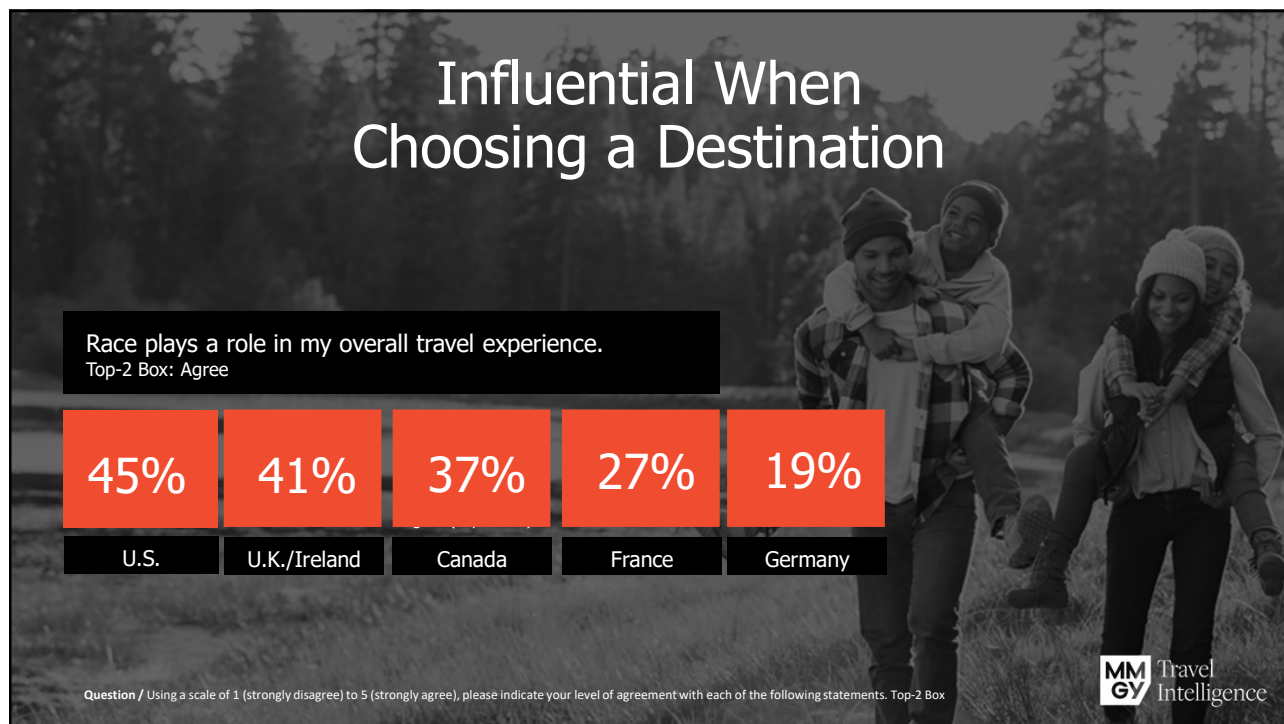
For Black Travel Organizations and Black Content Creators

Black Travel Organization Grant Recipients

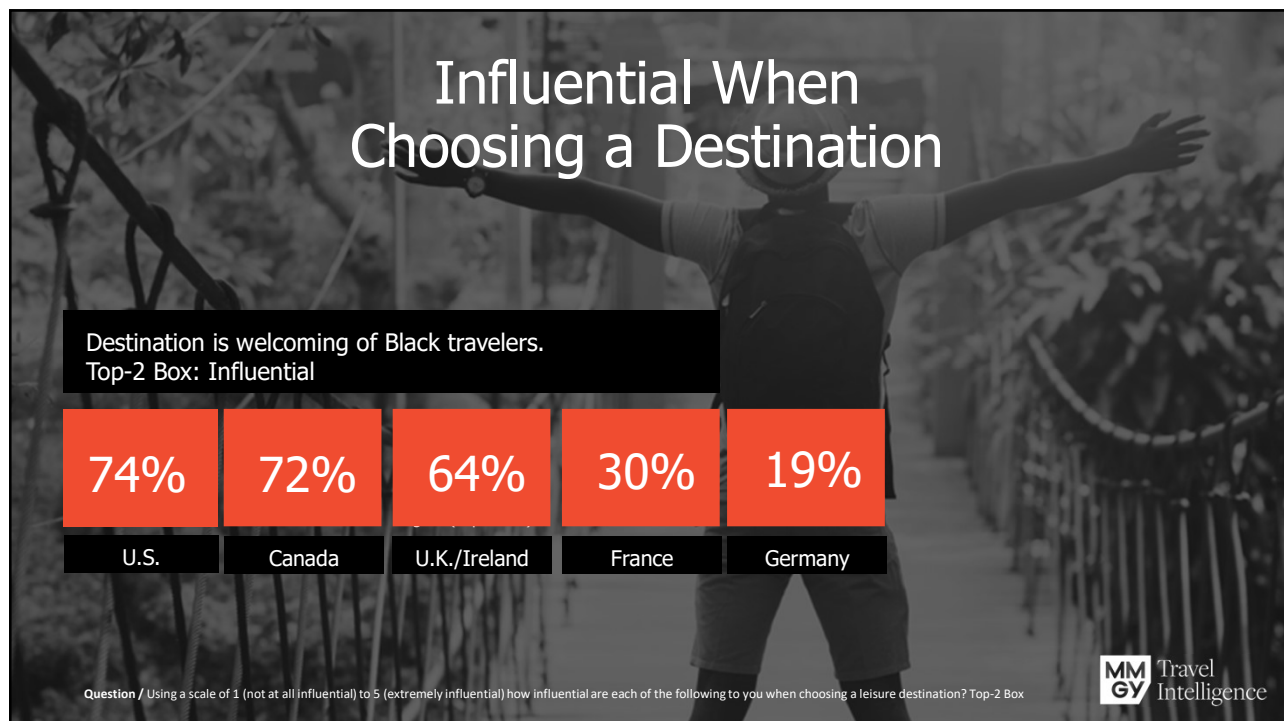
- Black Kids Adventures, Inc
- Black Kids Do Travel
- Fight Through Flights, Incorporated
- iFLY Youth
- Little Africa Paris
- Maison Carib
- Niagara Bound Tours
- Teens of Color Abroad, Inc.
- The Vonne Group
- The Wind Collective

BLACK TRAVEL ALLIANCE MMGY Travel Intelligence **APPLY NOW** MMGY Travel Intelligence

30



31



32



Black Leisure Travel Spending in the U.S.

\$129.6 Billion

Black U.S. leisure travelers spent \$129.6 billion on domestic and international leisure travel in 2019.

2019 Shiftlet TRAVEL PERFORMANCE/ MonitorSM

MMGY Travel Intelligence

33



Vistas Latinas:

*A Landmark Study of
U.S. Travelers of Hispanic Descent*

Vistas Latinas

TRAVEL UNITY

MMGY Travel Intelligence

34



35

Culinary Tourism

Interest (Top-2 Box)	Total	Gen Z	Millennial	Gen X	Boomer+
Brand-new dining experiences	73%	72%	75%	79%	60%
Street food, including food trucks	71%	78%	77%	70%	55%
Regional food specialties	70%	70%	71%	75%	62%
Food that is completely different from my own culture	70%	71%	72%	77%	57%
Dishes that are only available in the destination	70%	71%	72%	76%	56%
Food that reminds me of home	68%	68%	73%	69%	56%
New takes on traditional Latinx cuisines	65%	65%	69%	68%	50%
Food experiences by Latinx chefs	65%	70%	70%	72%	44%
Famous restaurants/famous chefs	65%	67%	73%	71%	41%
Food & wine festivals	62%	56%	70%	68%	44%
Fine dining	62%	66%	70%	65%	40%
Food tours	62%	66%	71%	66%	38%
Distillery or brewery tours	56%	46%	65%	62%	39%
Winery tours	55%	48%	65%	57%	39%

All Hispanic travelers are interested in “brand-new dining experiences” while on a leisure trip.

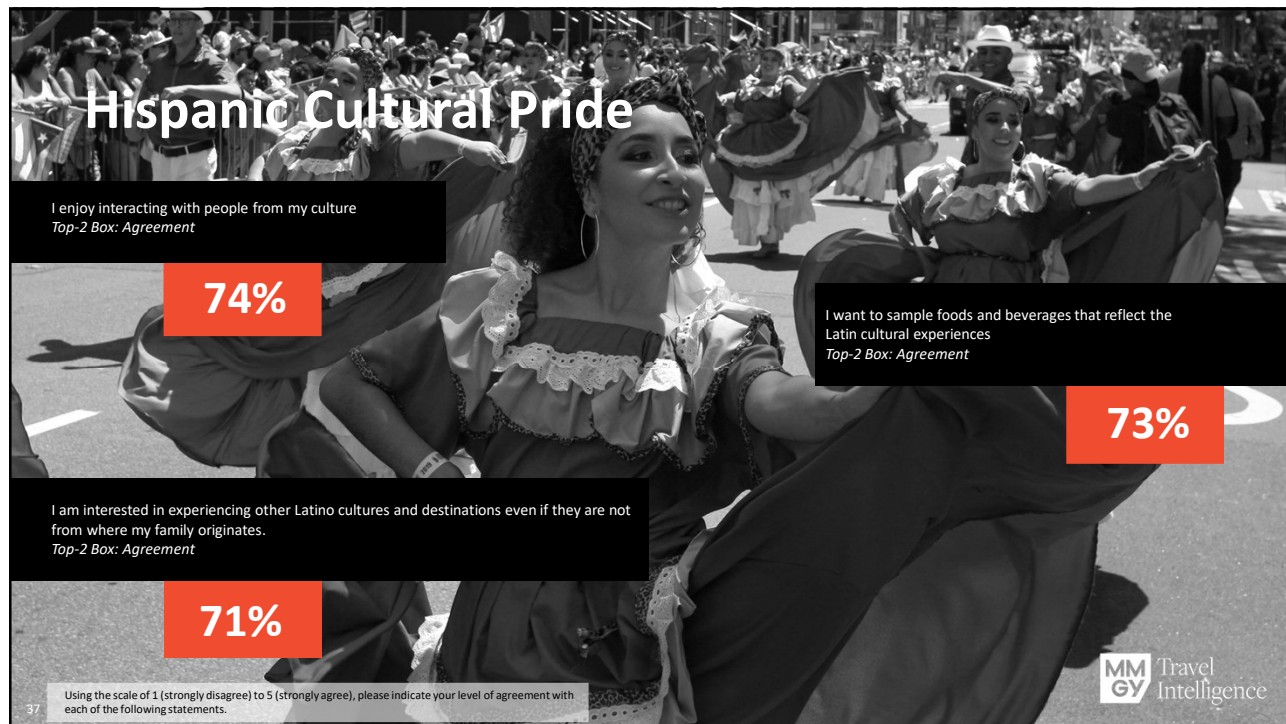
Different generations have different culinary interests while on a leisure trip.

- Gen Zers and Millennials are more interested in street food, including food trucks.
- Millennials are more interested in “famous restaurants/famous chefs.”
- Gen X are more interested in “food experiences by Latinx chefs.”

36 Please use the scale below to indicate your interest in each of the following culinary options while on a leisure trip. 1=Not at all interested, 5=Extremely interested

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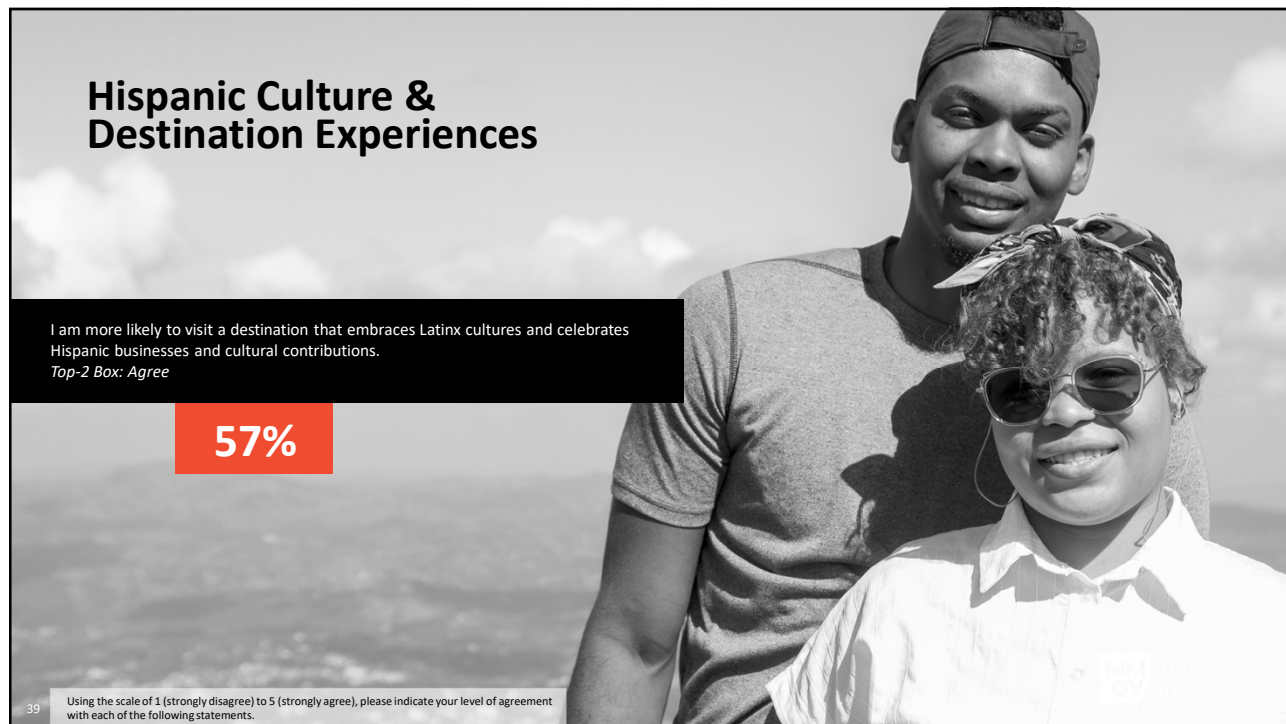
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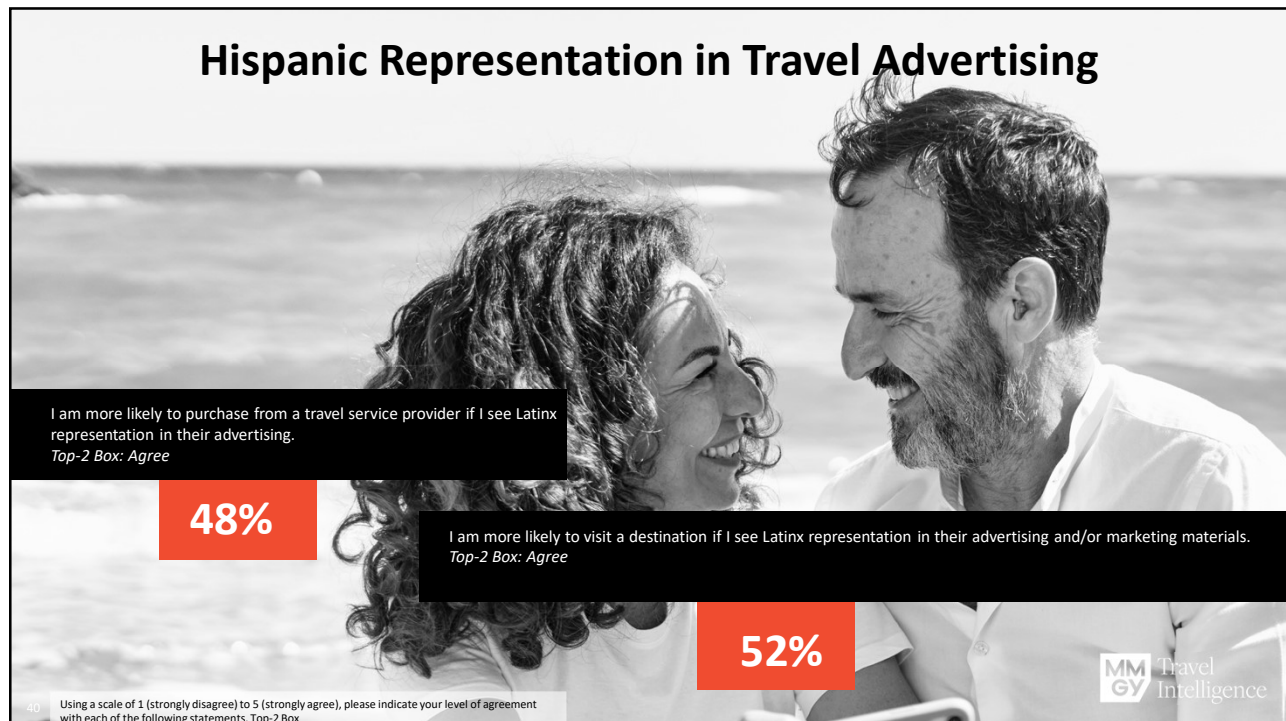
37



38



39



40

Hispanic/Latinx Discrimination in Travel

(Agreement Statements)



Four in 10 Hispanic travelers have experienced discrimination due to their "accent, language and/or physical appearance while traveling."

Comparing statements to *The Black Traveler* study, 71% of Black travelers agreed "I am more likely to visit a destination that is perceived as safe for Black travelers," and 69% saying they "...have to be more aware of my surroundings."



41 Using the scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements. (Top-2 Box Agreement)

41

EMERGING TRAVELERS



42

Millennials and Gen Z travelers perceive travel in a multi-dimensional way that extends beyond solely a leisure proposition.

Travel brands and products must connect with personal value systems and connect with culture orientations to grow affinity.



43



44

/ Travel Advisors

Travel Advisor Usage Is On The Rise

30%

Have used a travel advisor during the past two years.

Gen Zs: 44%
Millennials: 51%
 Gen Xers: 25%
 Boomers: 12%

36%

Plan to use a travel advisor during the next two years.

Gen Zs: 49%
Millennials: 57%
 Gen Xers: 33%
 Boomers: 18%

Millennials maintain the largest propensity to use travel agents, while Gen Xers displayed the largest increase in intent, and GenZs the second largest propensity behind Millennials.

Base: Active leisure travelers (n=3,937)
 Source: MMGY Global's 2021 *Portrait of American Travelers* Summer Edition

45



45

/ Lifestyle: Luxury

Luxury Travel

54%

Agree: I enjoy being treated like a VIP.

Gen Zs: 46%
Millennials: 66%
 Gen Xers: 57%
 Boomers: 45%

35%

Agree: I consider myself to be a luxury traveler.

Gen Zs: 34%
Millennials: 55%
 Gen Xers: 35%
 Boomers: 20%

Base: Active leisure travelers (n=3,937)
 Source: MMGY Global's 2021 *Portrait of American Travelers* Summer Edition

46



46

Emerging consumers will drive demand for global travel based on how brands operate sustainably, and how these consumers believe their individual actions affect destinations and the environment.



47

/ Sustainability & Travel



83%

Of active leisure travelers are willing to change travel behavior to reduce impact on the environment.

Gen Z: 92%
Millennials: 91%
 Gen X: 83%
 Boomers: 73%



48

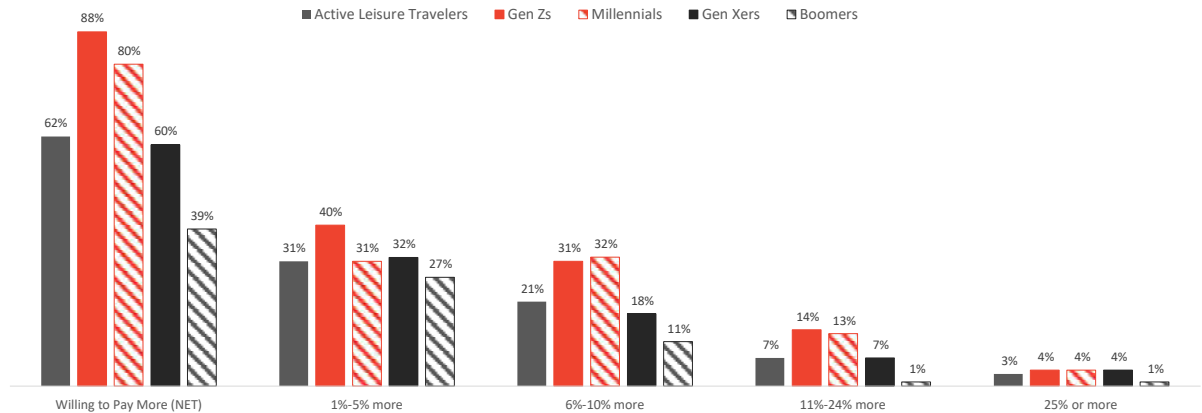
48

/ Sustainability & Travel By Generation



Emerging Travelers Willing to Pay More For Travel Brands That Demonstrate Environmental Responsibility

Willingness to Pay Higher Rates To Patronize Travel Service Providers Demonstrating Environmental Responsibility



Base: Active leisure travelers
Source: 2021 Portrait of American Travelers

Question/ Which of the following options best reflects your willingness to pay a higher rate or ticket price to patronize travel service providers (i.e., hotels, airlines), who demonstrate environmental responsibility?

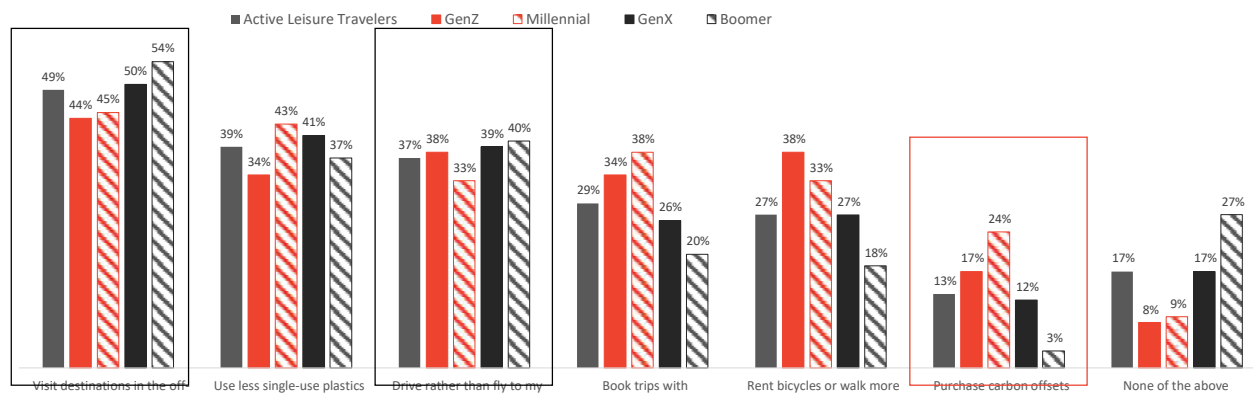
49

/ Sustainability & Travel



Emerging Travelers More Willing To Make The Extra Effort For The Environment

Actions Willing To Take To Reduce Impact On Environment



Base: Active leisure travelers
Source: 2021 Portrait of American Travelers

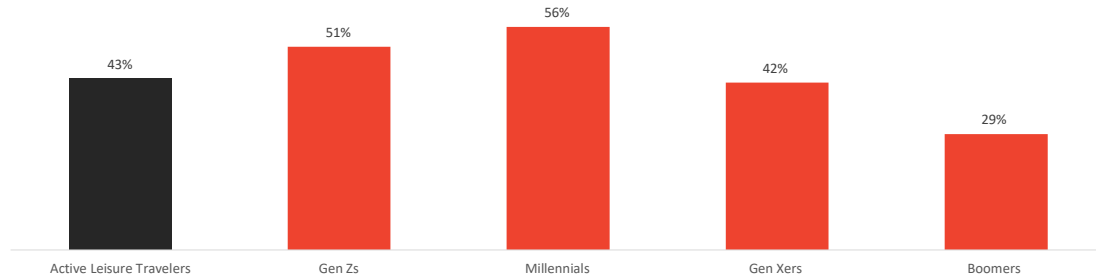
Question/ What are you willing to change about the way you travel to reduce your impact on the environment?

50

Emerging Travelers Are More Likely to Agree That Climate Change Will Impact Destination Selection

I Believe Climate Change Will Influence Which Destinations I Want To Visit
In The Next 5-10 Years

% Strongly/Somewhat Agree



51

51

READY FOR SOME TAKE-AWAYS?

52

MULTICULTURALISM IN THE U.S. HAS AS MUCH TO DO WITH RACE AS IT HAS TO DO WITH THE VALUES SYSTEMS OF EMERGING TRAVELERS, REGARDLESS OF RACE OR ETHNICITY.

TAP INTO AN EMPOWERED DIVERSE TRAVELER BY FIRST UNDERSTANDING THAT THESE AMERICANS MAY NOT FEEL REPRESENTED, SAFE OR WELCOMED.

THE AMERICAN CONSUMER IS CHANGING, AND ECONOMIC POWER RESIDES WITHIN CONSUMERS OF ALL TYPES. THIS IS AN IMPORTANT REMINDER TO TRAVEL BRANDS OUTSIDE OF THE U.S.



53

Danny Guerrero (he/him)
Vice President, North American Strategy
Co-Chair, Diversity, Equity & Inclusion Council
dguerrero@mmgyglobal.com

THANK YOU

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