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

We revolve around travel.
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.
An Emerging America

In 109 counties, white population share fell below 50% between 2000 and 2018

U.S. counties in which the non-Hispanic white share of the population fell below 50% from 2000 to 2018

Percentage point decline in the non-Hispanic white share of the population, 2000-2018

County total population, 2018

100K  500K  1 million  3 million

Note: Non-Hispanic whites became a minority in 138 counties between 2000 and 2018. Among this group, the 29 counties with fewer than 10,000 people in 2018 are not displayed on the map.

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

U.S. Census 2020

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.
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. *

The Latinx population grew by 20% since 2010, with almost three-quarters of that growth coming from a natural increase.
The Black population grew by almost 12% over the decade.

The Power of Multicultural Travelers
44% of all U.S. Travel Spend

Multicultural Travelers

Source: MMGY Travel Intelligence 2019 DK Shifflet's TRAVEL PERFORMANCE Monitor

2021 Portrait of American Travelers
Diverse travelers are awakening to the power of global travel and self fulfillment.

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

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

<table>
<thead>
<tr>
<th>Travel Motivators</th>
<th>Active Travelers</th>
<th>Non-White Travelers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relaxation</td>
<td>78%</td>
<td>71%</td>
</tr>
<tr>
<td>Exploration</td>
<td>66%</td>
<td>67%</td>
</tr>
<tr>
<td>Experience different cultures</td>
<td>60%</td>
<td>67%</td>
</tr>
<tr>
<td>Experience new cuisines</td>
<td>56%</td>
<td>57%</td>
</tr>
<tr>
<td>Enhance existing relationships</td>
<td>54%</td>
<td>57%</td>
</tr>
<tr>
<td>Self-discovery</td>
<td>46%</td>
<td>50%</td>
</tr>
<tr>
<td>Meet new people</td>
<td>48%</td>
<td>50%</td>
</tr>
<tr>
<td>Pursue a hobby</td>
<td>38%</td>
<td>50%</td>
</tr>
<tr>
<td>Pursue wellness programs/lifestyle</td>
<td>27%</td>
<td>47%</td>
</tr>
<tr>
<td>Play/participate in a sport</td>
<td>28%</td>
<td>39%</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Travel Motivators</th>
<th>Active Travelers</th>
<th>LGBTQ+ Travelers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relaxation</td>
<td>78%</td>
<td>71%</td>
</tr>
<tr>
<td>Exploration</td>
<td>66%</td>
<td>67%</td>
</tr>
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</tr>
<tr>
<td>Enhance existing relationships</td>
<td>54%</td>
<td>57%</td>
</tr>
<tr>
<td>Self-discovery</td>
<td>46%</td>
<td>50%</td>
</tr>
<tr>
<td>Meet new people</td>
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<td>50%</td>
</tr>
<tr>
<td>Pursue a hobby</td>
<td>38%</td>
<td>50%</td>
</tr>
<tr>
<td>Pursue wellness programs/lifestyle</td>
<td>27%</td>
<td>47%</td>
</tr>
<tr>
<td>Play/participate in a sport</td>
<td>28%</td>
<td>34%</td>
</tr>
</tbody>
</table>
Social justice movements, racial and gender inequity are casting a light on perceived inequities in travel.

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%

Base: Active leisure travelers
Source: 2021 Portrait of American Travelers
Diversity in Travel

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

- **39%** Non-White Travelers
- **36%** LGBTQ+ Travelers
- **27%** All Active Travelers

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

50% Non-White Travelers
48% LGBTQ+ Travelers
34% All Active Travelers

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

Base: Active leisure travelers
Source: 2021 Portrait of American Travelers
Concerns of safety and feeling welcome emerge as barriers to equitable and inclusive travel for a variety of groups.

% 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

- Non-White Travelers: 57%
- LGBTQ+ Travelers: 51%
- All Active Travelers: 39%
The Black Traveler
Insights, Opportunities & Priorities

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

Over $100,000 Raised To Fund Grants
For Black Travel Organizations and Black Content Creators

Apply Now
### Race plays a role in my overall travel experience.

**Top-2 Box: Agree**

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S.</td>
<td>45%</td>
</tr>
<tr>
<td>U.K./Ireland</td>
<td>41%</td>
</tr>
<tr>
<td>Canada</td>
<td>37%</td>
</tr>
<tr>
<td>France</td>
<td>27%</td>
</tr>
<tr>
<td>Germany</td>
<td>19%</td>
</tr>
</tbody>
</table>

### Destination is welcoming of Black travelers.

**Top-2 Box: Influential**

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S.</td>
<td>74%</td>
</tr>
<tr>
<td>Canada</td>
<td>72%</td>
</tr>
<tr>
<td>U.K./Ireland</td>
<td>64%</td>
</tr>
<tr>
<td>France</td>
<td>30%</td>
</tr>
<tr>
<td>Germany</td>
<td>19%</td>
</tr>
</tbody>
</table>
Black U.S. leisure travelers spent $129.6 billion on domestic and international leisure travel in 2019.

Vistas Latinas:
A Landmark Study of U.S. Travelers of Hispanic Descent
Hispanic U.S. leisure travelers spent $113.9 B on domestic leisure travel in 2019.

Transportation and food and beverage account for the largest share of spending.

### Culinary Tourism

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

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."

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
I enjoy interacting with people from my culture  
Top-2 Box: Agreement

74%

I want to sample foods and beverages that reflect the Latin cultural experiences  
Top-2 Box: Agreement

73%

I am interested in experiencing other Latino cultures and destinations even if they are not from where my family originates.  
Top-2 Box: Agreement

71%

Using the scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements.

Hispanic Cultural Pride

Experience Hispanic Culture

Giving my children the opportunity to experience their cultural background makes me feel like a better parent.  
Top-2 Box: Agree

70%

Experiencing my culture is a great learning experience for my children.  
Top-2 Box: Agree

70%
I am more likely to visit a destination that embraces Latinx cultures and celebrates Hispanic businesses and cultural contributions.
Top-2 Box: Agree
57%

I am more likely to purchase from a travel service provider if I see Latinx representation in their advertising.
Top-2 Box: Agree
48%

I am more likely to visit a destination if I see Latinx representation in their advertising and/or marketing materials.
Top-2 Box: Agree
52%
Hispanic/Latinx Discrimination in Travel
(Agreement Statements)

I am more likely to visit a destination that is perceived as safe for Latinx travelers. 66%
As a Latinx traveler, I feel like I have to be more aware of my surroundings when traveling. 61%
I have experienced discrimination due to my accent, language and/or physical appearance while traveling. 41%
I have felt unwelcome in destinations I have visited. 36%
I have felt unwelcome in hotels/resorts I have stayed in. 34%

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.”

EMERGING TRAVELERS
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.
/ 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 Gen Zs the second largest propensity behind Millennials.


/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%

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.

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%
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

<table>
<thead>
<tr>
<th>Willing to Pay More (NET)</th>
<th>Active Leisure Travelers</th>
<th>Gen Zs</th>
<th>Millennials</th>
<th>Gen Xers</th>
<th>Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>1%-5% more</td>
<td>62%</td>
<td>40%</td>
<td>21%</td>
<td>7%</td>
<td>3%</td>
</tr>
<tr>
<td>6%-10% more</td>
<td>40%</td>
<td>31%</td>
<td>18%</td>
<td>11%</td>
<td>7%</td>
</tr>
<tr>
<td>11%-24% more</td>
<td>21%</td>
<td>32%</td>
<td>7%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>25% or more</td>
<td>3%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
</tr>
</tbody>
</table>

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

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

Actions Willing To Take To Reduce Impact On Environment

<table>
<thead>
<tr>
<th>Actions</th>
<th>Active Leisure Travelers</th>
<th>Gen Zs</th>
<th>Millennials</th>
<th>Gen Xers</th>
<th>Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visit destinations in the off-season to reduce overcrowding</td>
<td>49%</td>
<td>39%</td>
<td>33%</td>
<td>29%</td>
<td>27%</td>
</tr>
<tr>
<td>Use less single-use plastics while traveling</td>
<td>50%</td>
<td>43%</td>
<td>34%</td>
<td>38%</td>
<td>40%</td>
</tr>
<tr>
<td>Book trips with environmentally friendly hotels and tour companies</td>
<td>45%</td>
<td>34%</td>
<td>29%</td>
<td>38%</td>
<td>38%</td>
</tr>
<tr>
<td>Rent bicycles or walk more instead of taking automobile transportation</td>
<td>39%</td>
<td>35%</td>
<td>33%</td>
<td>33%</td>
<td>38%</td>
</tr>
<tr>
<td>Purchase carbon offsets</td>
<td>8%</td>
<td>3%</td>
<td>1%</td>
<td>3%</td>
<td>2%</td>
</tr>
</tbody>
</table>

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

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

- 43% Active Leisure Travelers
- 51% Gen Zs
- 56% Millennials
- 42% Gen Xers
- 29% Boomers

READY FOR SOME TAKE-AWAYS?
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.

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

THANK YOU