

May 2026

Future Partners



The Future-Ready CALA Market: What American Travelers Want Next

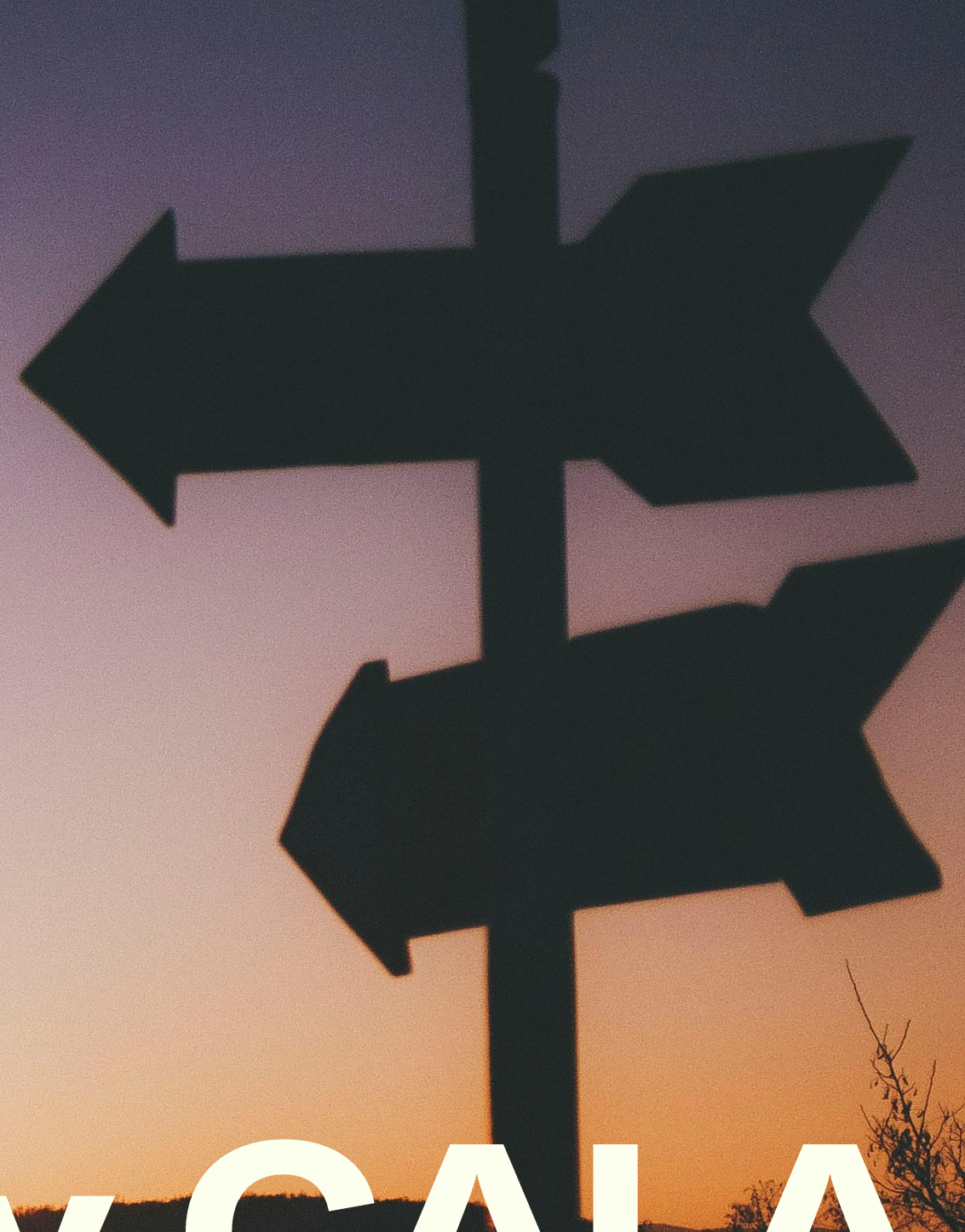


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We Asked Travelers...

May 2026

Future Partners



The Future-Ready CALA Market: What American Travelers Want Next

Opportunity powered by *Insight*

Future Partners

Shaping strategies for travel brands and
tourism leaders that capture *hearts,*
minds and *market share*

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*Bringing the future of travel
within reach*

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Travel & Tourism
Market Research

WHO WE SERVE

- Destination Marketing Organizations
- Airports & Aviation
- Lodging & Hospitality
- Attractions & Entertainment
- International Tourism Boards

200+ Clients

What We Do

Syndicated research + custom insights for the travel & tourism industry

SYNDICATED RESEARCH

Monthly

The State of the American Traveler

Nationally representative tracking of U.S. traveler sentiment, behavior & spending intentions

Quarterly

The State of the International Traveler

16 top global tourism markets—inbound intent, destination perceptions & trip planning

Annual + Monthly Deep Dives

The State of the Meetings Industry

MICE sector tracking with trend reports and deep-dive issue editions

CUSTOM RESEARCH

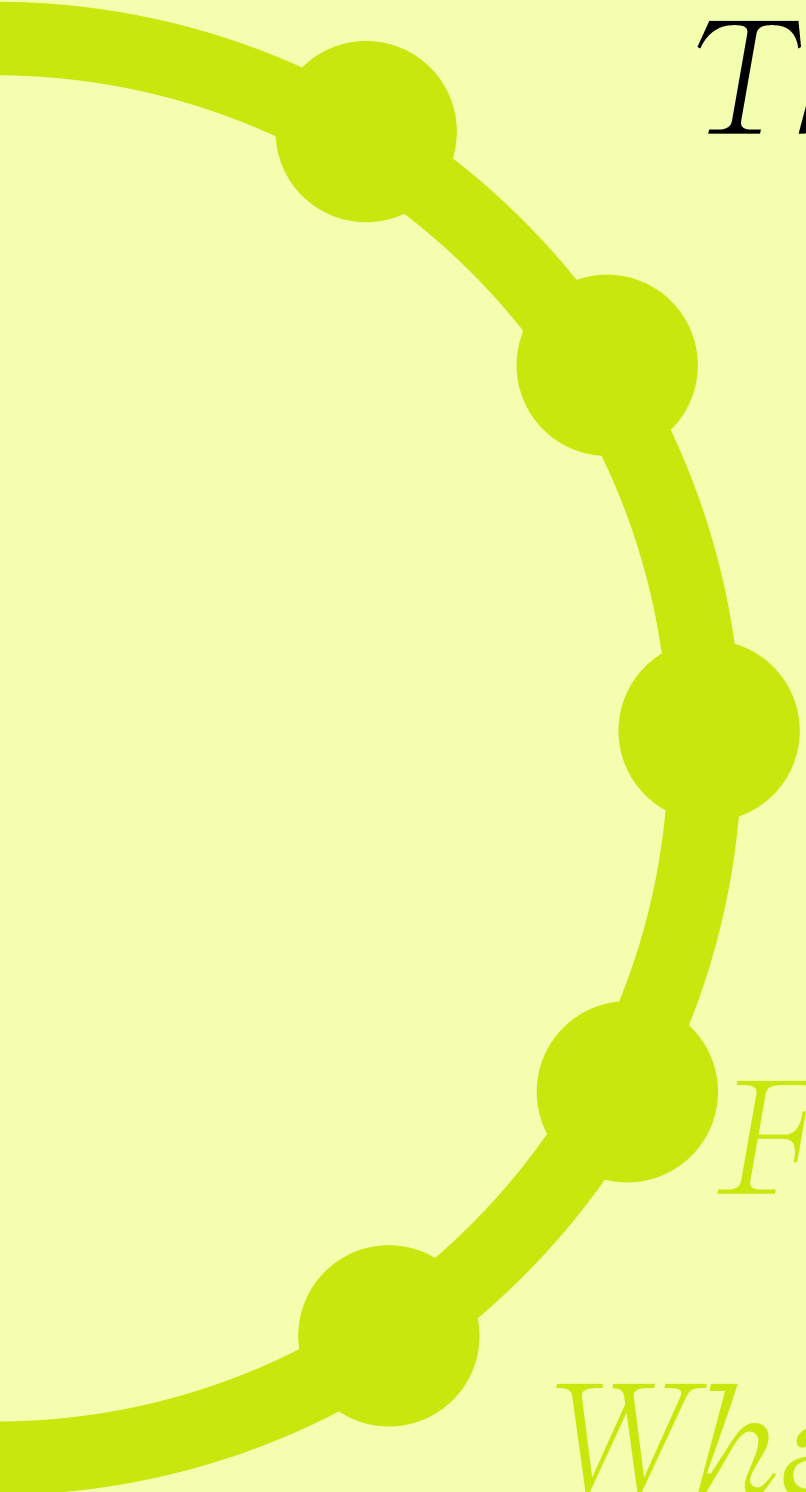
**Audience &
Visitor Insights**

**Brand &
Perception
Studies**

**Campaign
Effectiveness**

**Market &
Concept
Testing**

Today's Agenda



The American Traveler Right Now

*The International Opportunity — Where
CALA Fits*

*The High-Value Traveler + Trends You're
Competing For*

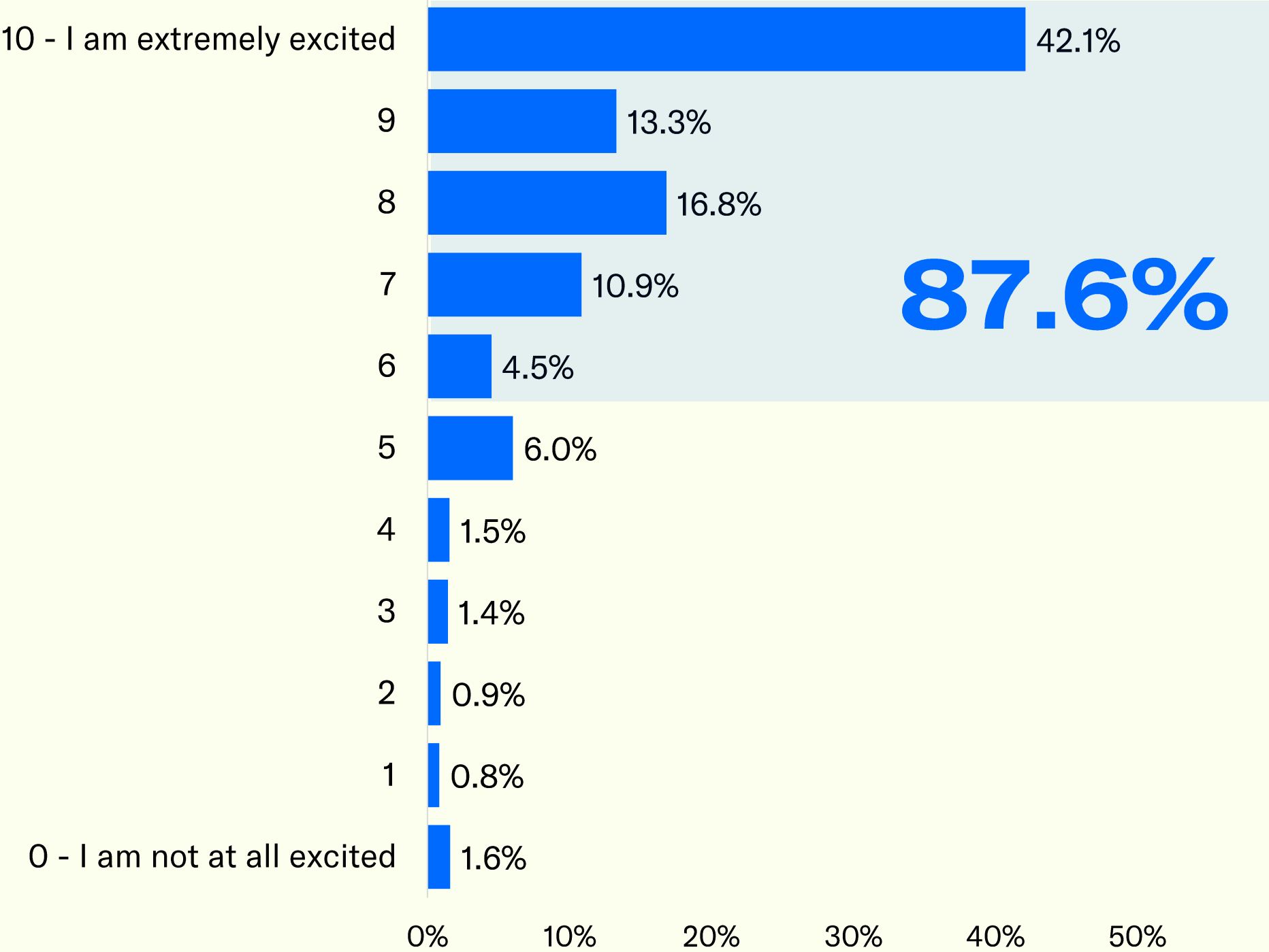
Four Forces Reshaping the Game

What This Means for Your Property

Nearly 9-in-10 Travelers Rate Their Excitement for Travel High

Question:

Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?



Excitement for Leisure Travel Remains High

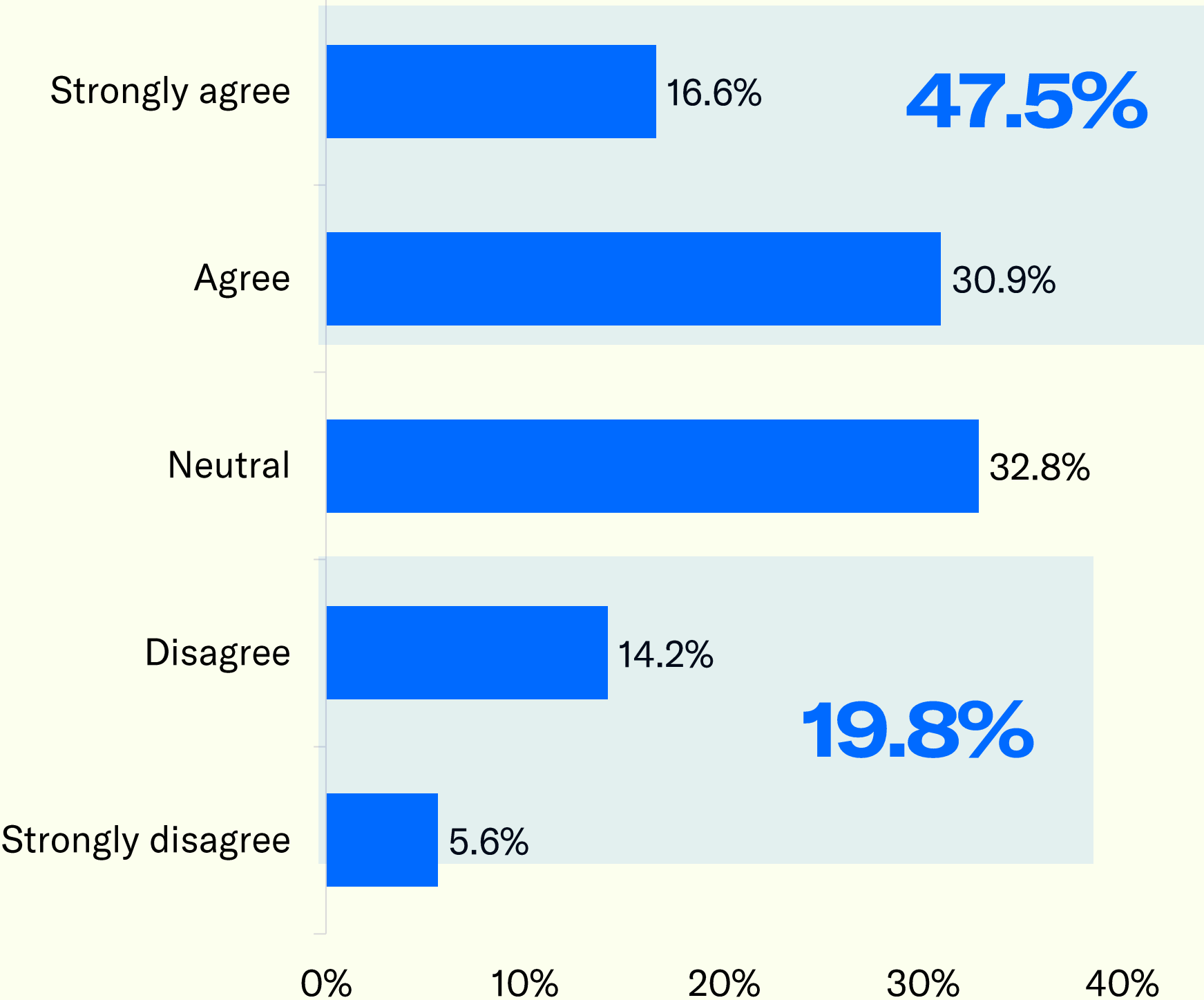
Question: Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?



Just Under Half of Americans Expect a Recession in the Next 6 Months

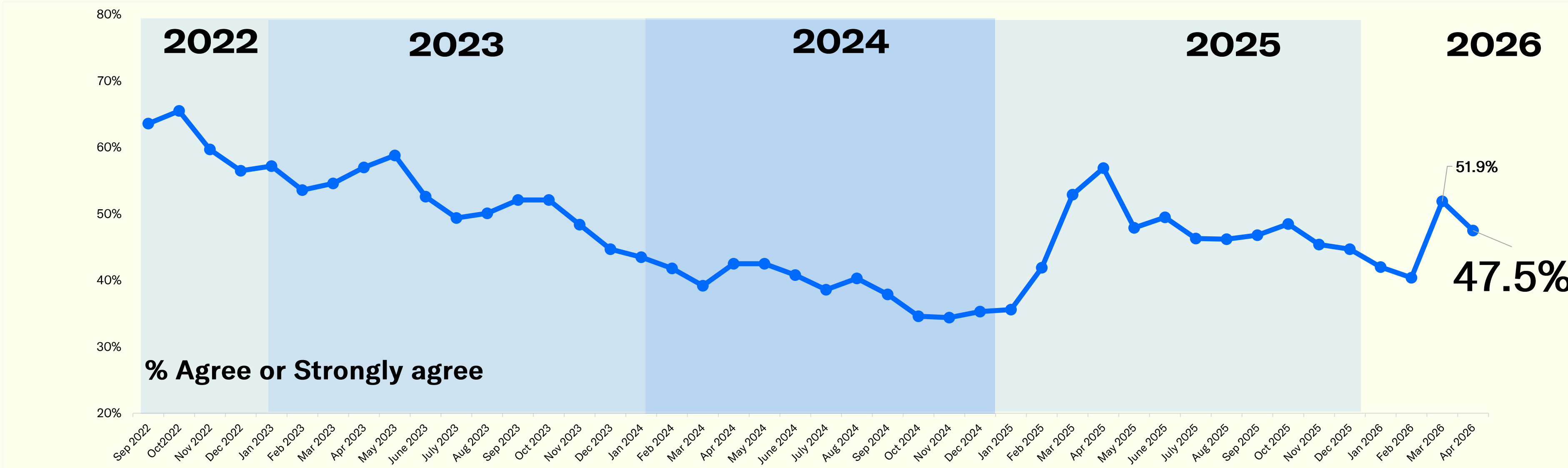
Statement Agreement:

I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



Recession Fears Recently Spiked

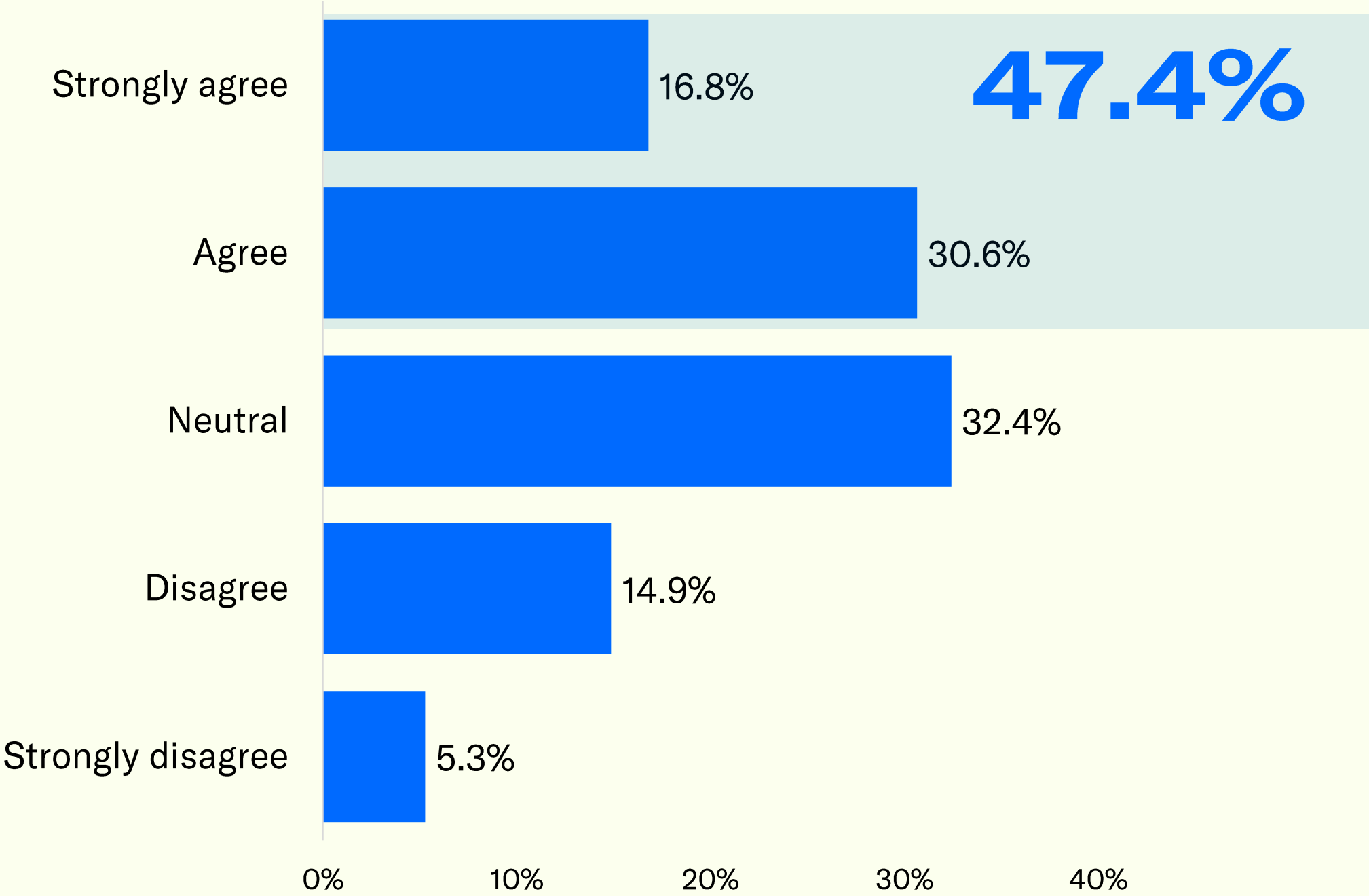
Statement Agreement: I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



Many Travelers are being Careful with their Money, Fearing an Economic Downturn

Question:

Right now, I am being careful with my money because I'm concerned about an upcoming recession.

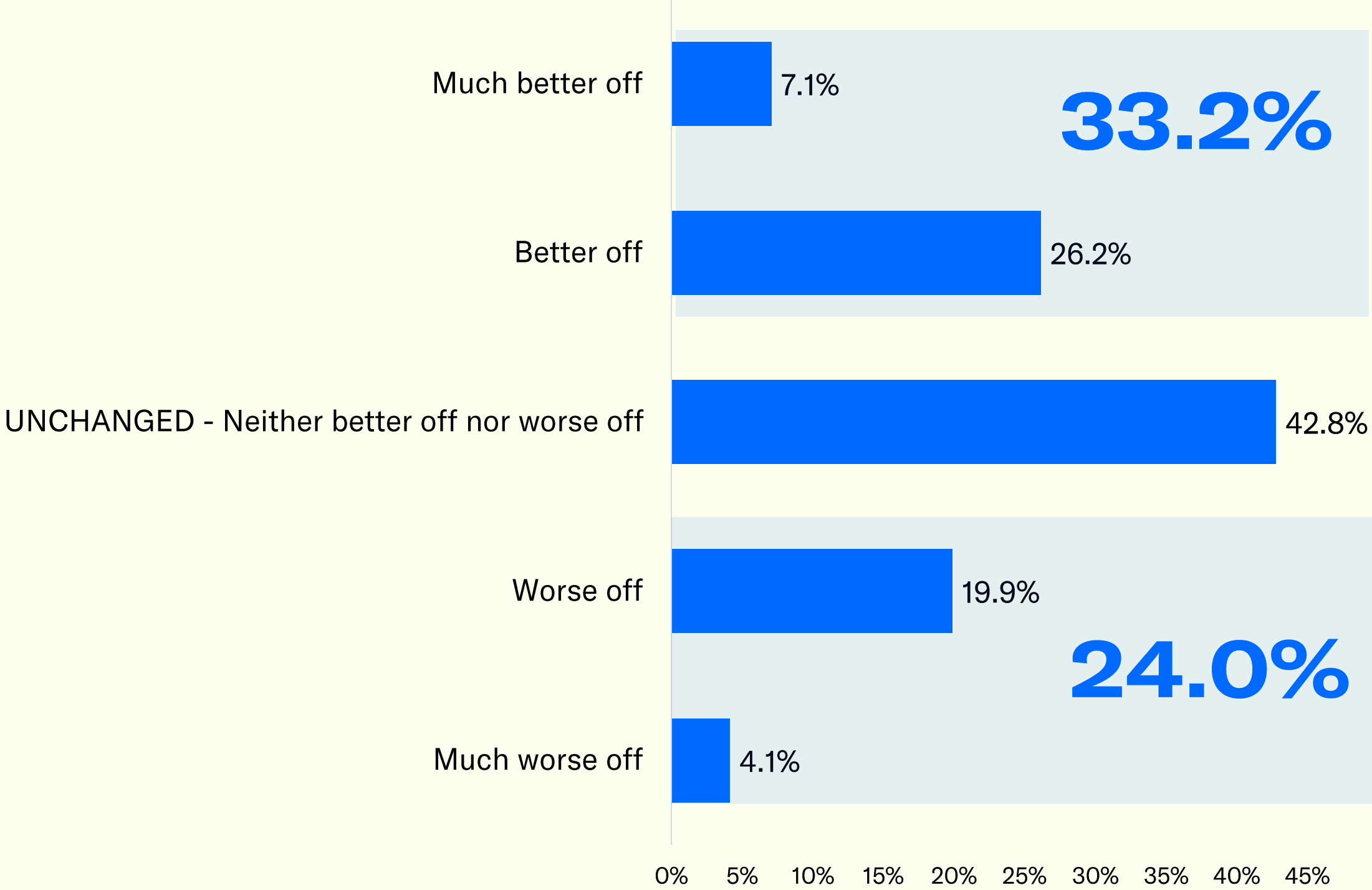


(Base: All respondents, 4,009 completed surveys..)

Despite Recession Concerns, More Americans Feel Financially Better Off than Worse Off

Question:

Would you say that you (and your household) are better off or worse off financially than you were a year ago?

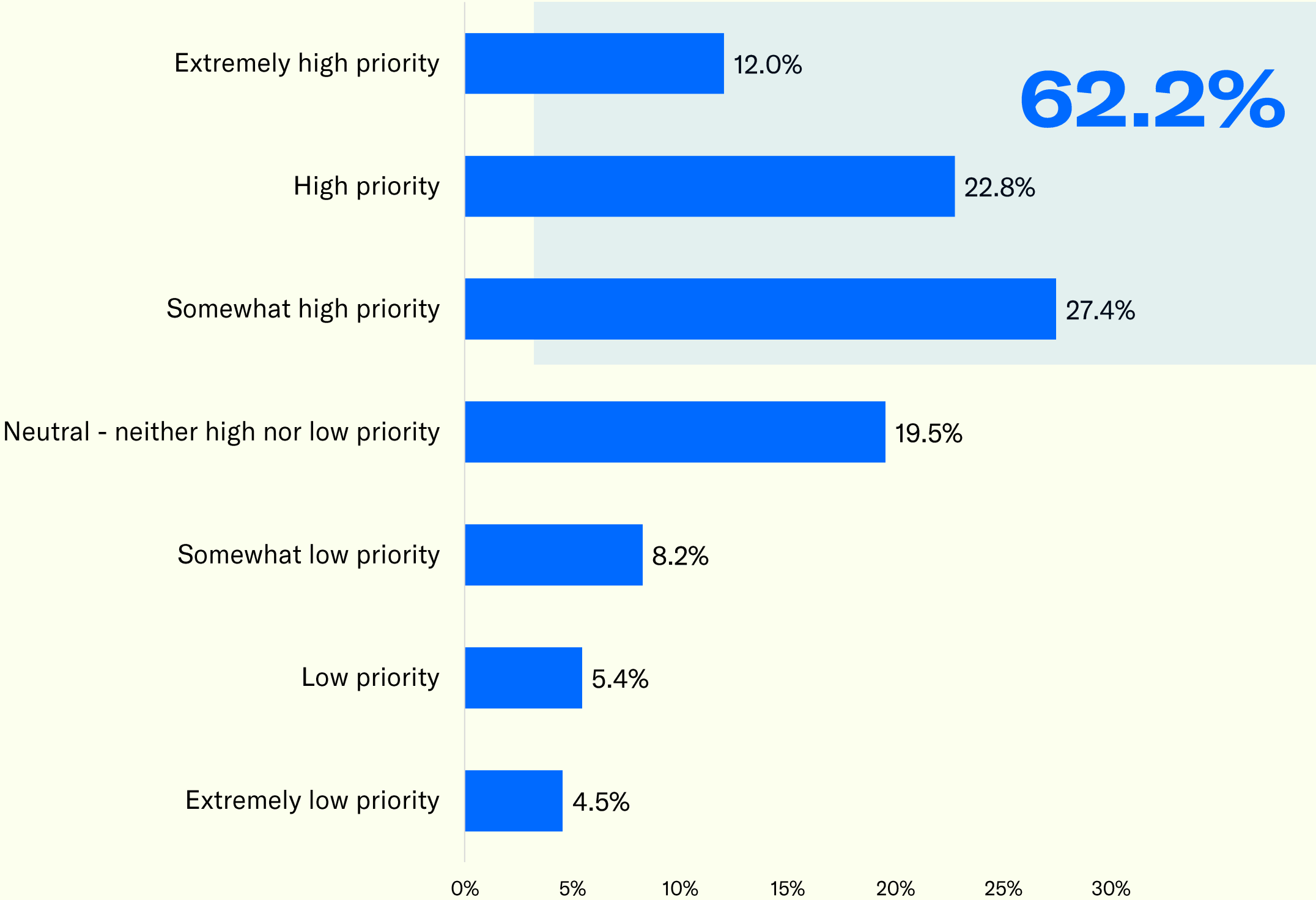


Travel Still Claims a Top Spot Among Consumer Spending Priorities

Question:

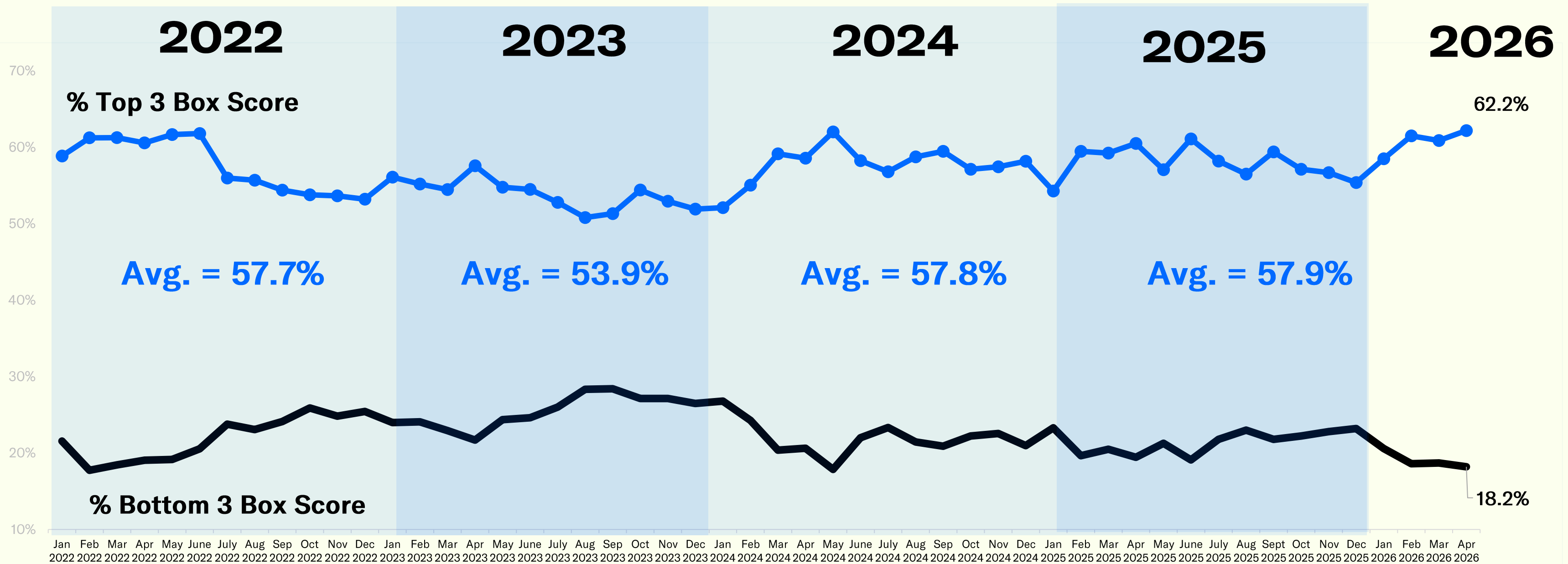
Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.

Leisure travel will be a(n)
_____.



Travel Spending Priority Climbs above the 4-Year Average

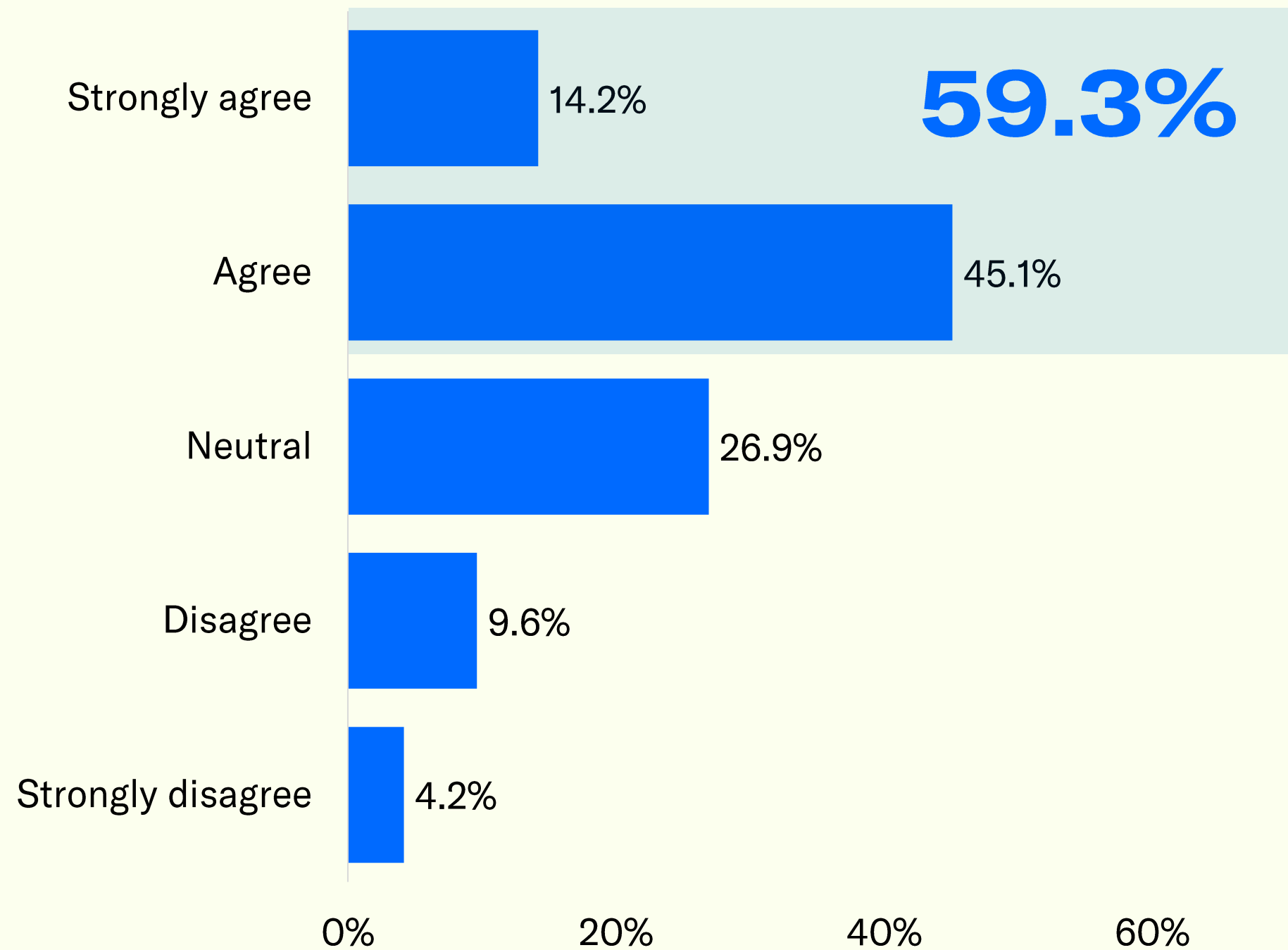
Question: Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.



Most Americans Agree that Travel is a Worthwhile Investment

Question:

Even in an economic recession, I'd consider travel to be a worthwhile investment.



Financial Constraints Continue to be the Biggest Barriers to Travel

Question:
In the PAST SIX (6) MONTHS, which (if any) of the following have kept you from traveling more than you would have otherwise preferred? (Select all that apply)



Today's Agenda



The American Traveler Right Now

*The International Opportunity — Where
CALA Fits*

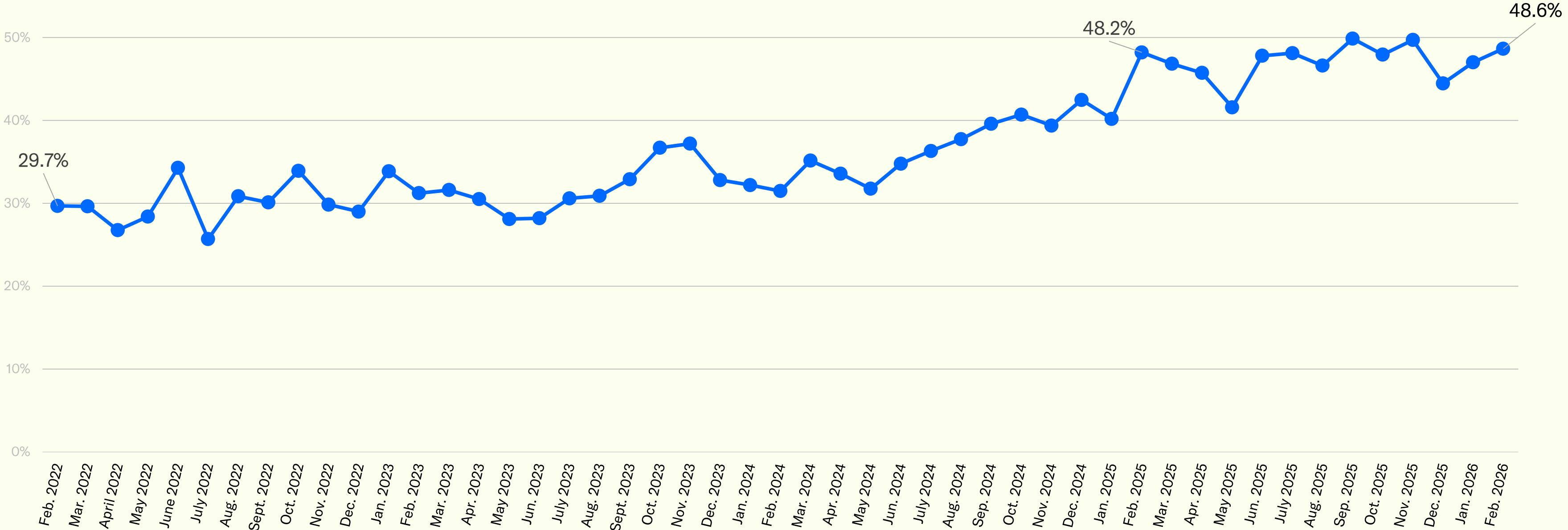
*The High-Value Traveler + Trends You're
Competing For*

Four Forces Reshaping the Game

What This Means for Your Property

Americans' International Travel Intent is at Record Levels

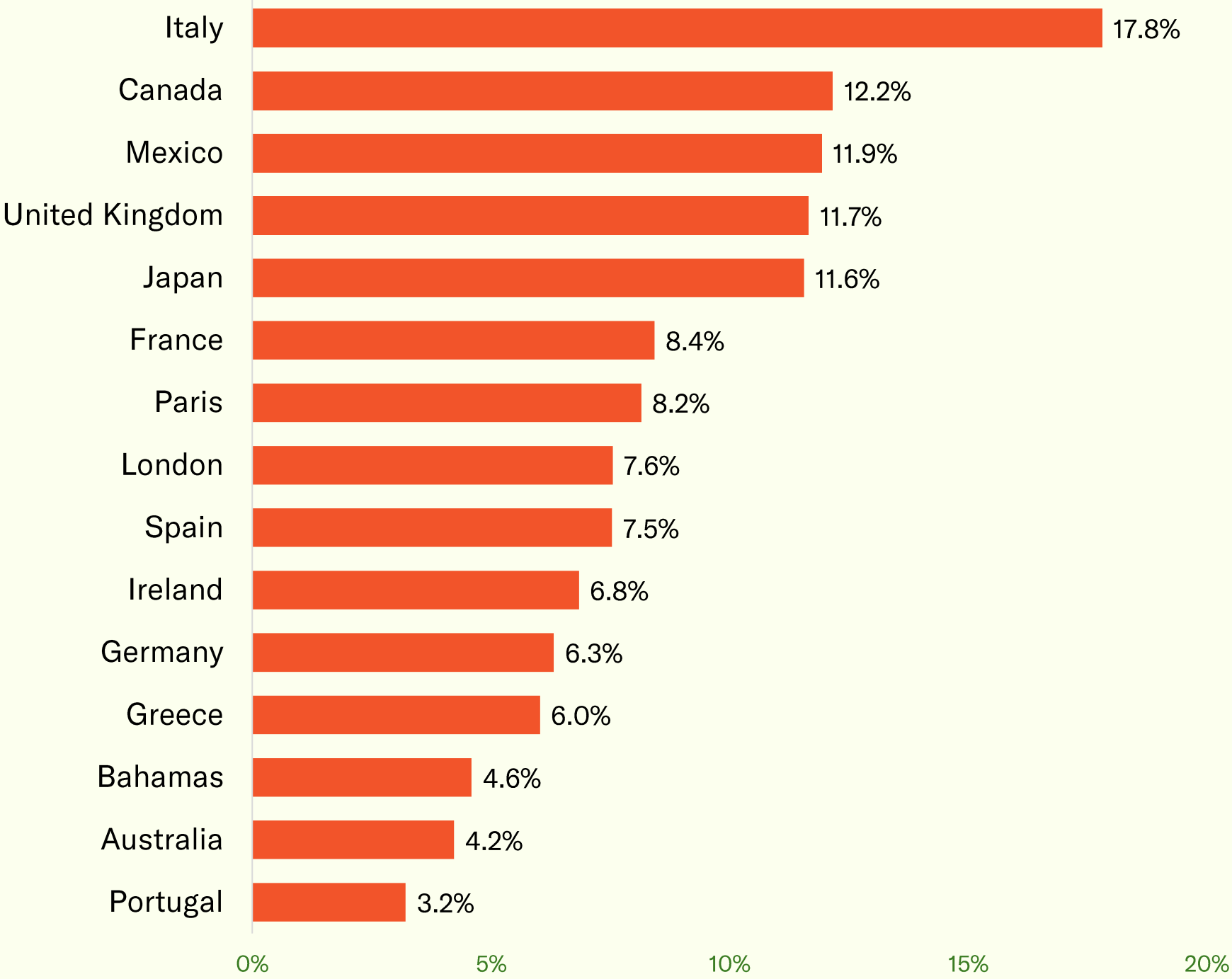
Question: How likely are you to travel outside the United States for leisure in the NEXT TWELVE (12) MONTHS?



Top 15 International Destinations Americans Want to Visit in the Next 12 Months

Question:
Which FOREIGN DESTINATIONS do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to five)

(Please only include destinations outside the United States)



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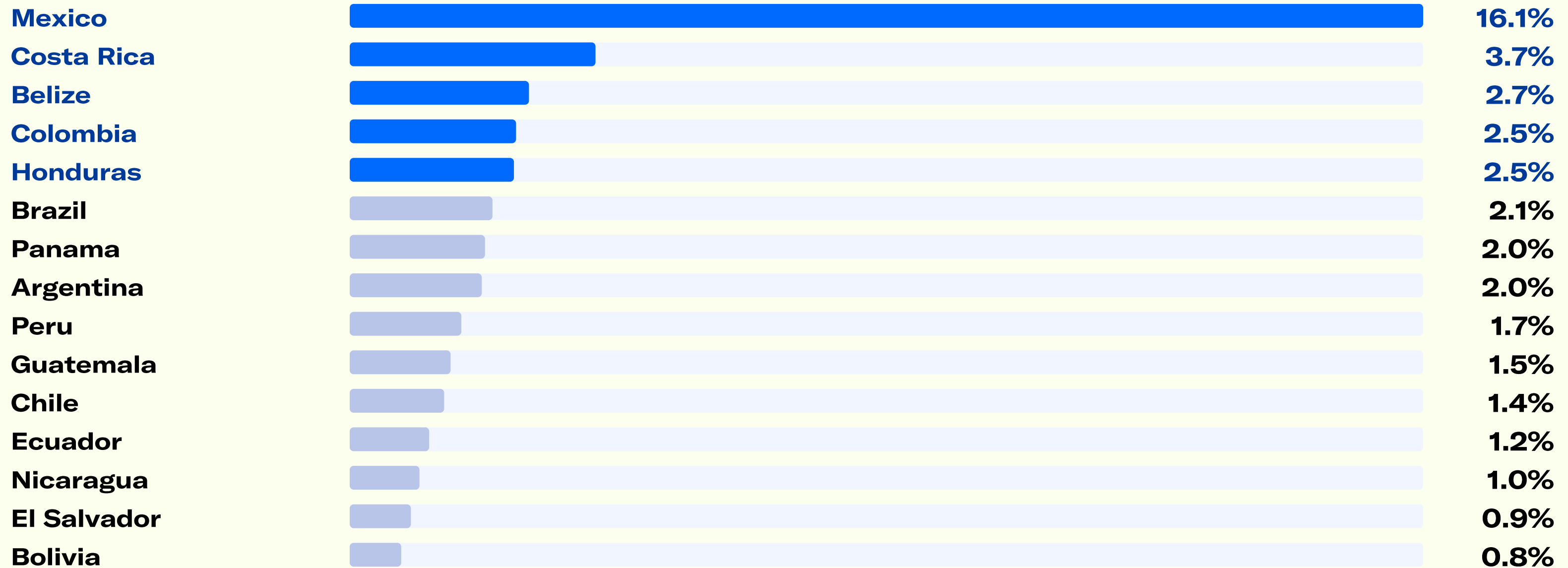
***Latin America* as a Travel
Destination for American
Travelers**

Where Americans Have **Actually Been** in Latin America

Mexico (16.1%) commands more past-2-year reach than the next 14 LATAM markets combined — a category of its own.

% OF U.S. TRAVELERS · YTD AVG.

Visited in the past 2 years

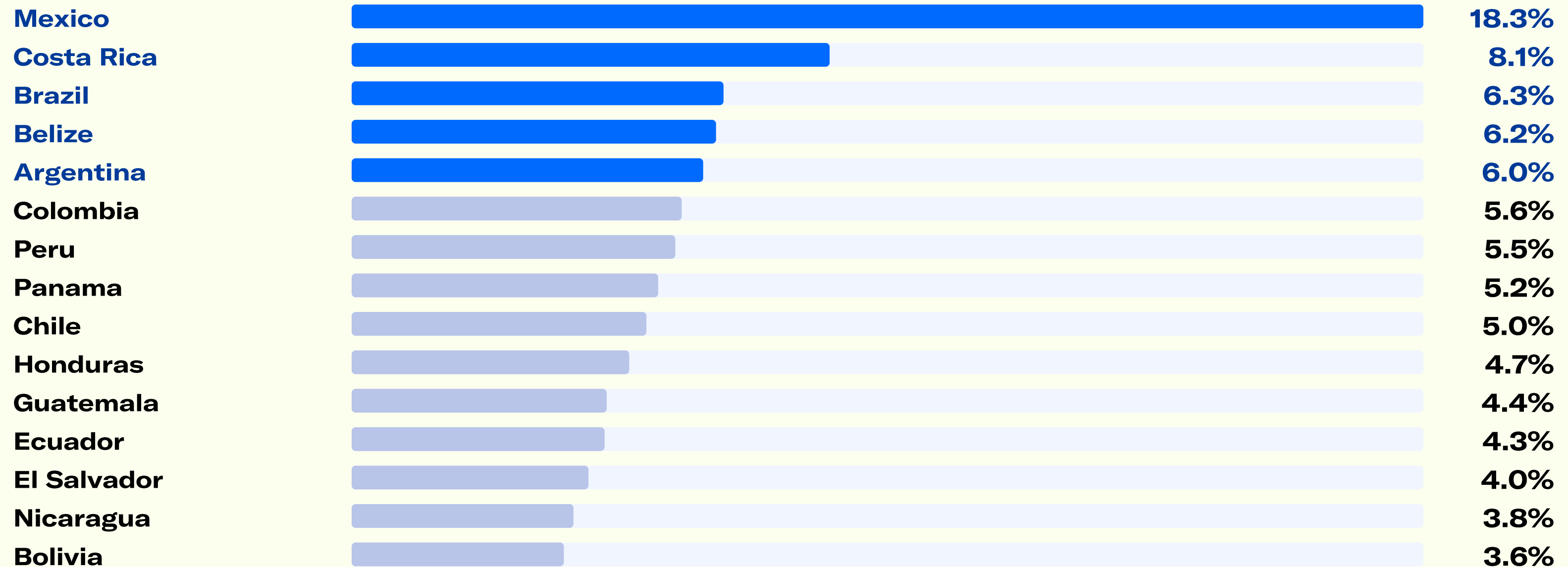


Where They're **Headed Next** in Latin America

Costa Rica jumps to 8.1% intent, more than doubling its past-2-year base — the clearest forward signal outside Mexico.

% OF U.S. TRAVELERS · YTD AVG.

Likely to visit in the next 2 years

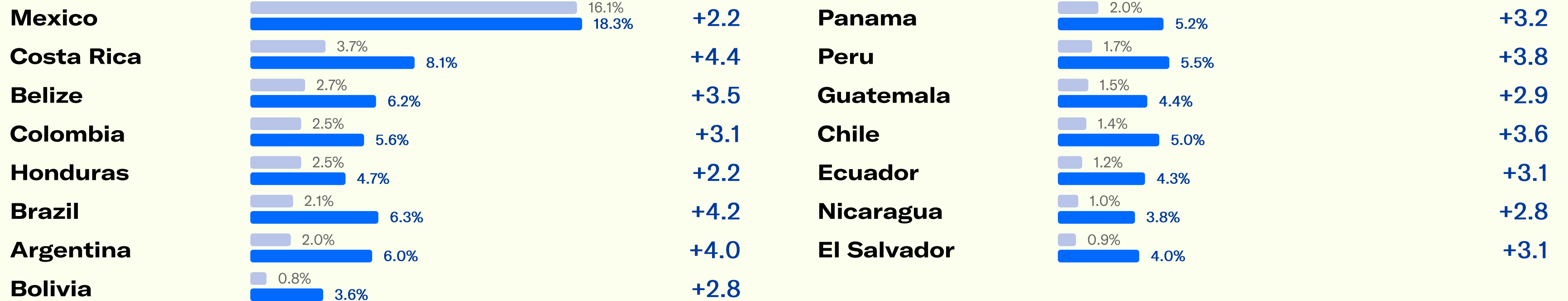


Every LATAM Market Has **Forward Momentum**

Past 2 years vs. likely next 2 years — for every Latin American market, more Americans plan to visit than recently visited. Bolivia and Nicaragua show 3–4× forward intent relative to current base.

% OF U.S. TRAVELERS · YTD AVG.

■ Past 2 years (visited) ■ Next 2 years (likely)



Demographic Index

HOW TO READ IT

$$\text{Index} = (\text{Sub-group \%}) \div (\text{Total \%}) \times 100$$

120+

Strong over-index
≥ 20% more likely
than the avg.
traveler.

110–119

Mild over-index
Somewhat more
likely than average.

90–109

On par
Roughly in line with
the average.

< 90

Under-index
Less likely than
average to travel
here.

Visited in Past 2 Years by Age

Index 100 = U.S. leisure traveler average. Blue = over-index (more likely). Orange = under-index. YTD avg.

COUNTRY	TOTAL %	GEN Z	MILLENNIAL	GEN X	BOOMER+
Mexico	16.1%	65	104	124	81
Costa Rica	3.7%	111	100	124	78
Belize	2.7%	119	85	115	96
Colombia	2.5%	88	124	116	72
Honduras	2.5%	108	88	108	96
Brazil	2.1%	200	138	124	52
Argentina	2.0%	170	120	115	65
Panama	2.0%	110	95	110	100
Peru	1.7%	176	129	118	59
Guatemala	1.5%	167	147	113	60
Chile	1.4%	157	143	107	64
Ecuador	1.2%	183	158	108	42
Nicaragua	1.0%	200	140	140	40
El Salvador	0.9%	156	167	133	33
Bolivia	0.8%	175	162	125	25

Visited in Past 2 Years by Region

Index 100 = U.S. leisure traveler average. Blue = over-index (more likely). Orange = under-index. YTD avg.

COUNTRY	TOTAL %	WEST	MIDWEST	NORTHEAST	SOUTH
Mexico	16.1%	127	87	78	99
Costa Rica	3.7%	100	73	111	108
Belize	2.7%	89	81	85	122
Colombia	2.5%	84	48	128	124
Honduras	2.5%	80	84	68	128
Brazil	2.1%	95	71	129	114
Argentina	2.0%	80	65	140	110
Panama	2.0%	100	70	120	110
Peru	1.7%	106	76	106	106
Guatemala	1.5%	107	73	113	107
Chile	1.4%	107	50	129	107
Ecuador	1.2%	83	67	100	117
Nicaragua	1.0%	120	50	130	110
El Salvador	0.9%	122	56	100	122
Bolivia	0.8%	87	37	138	112

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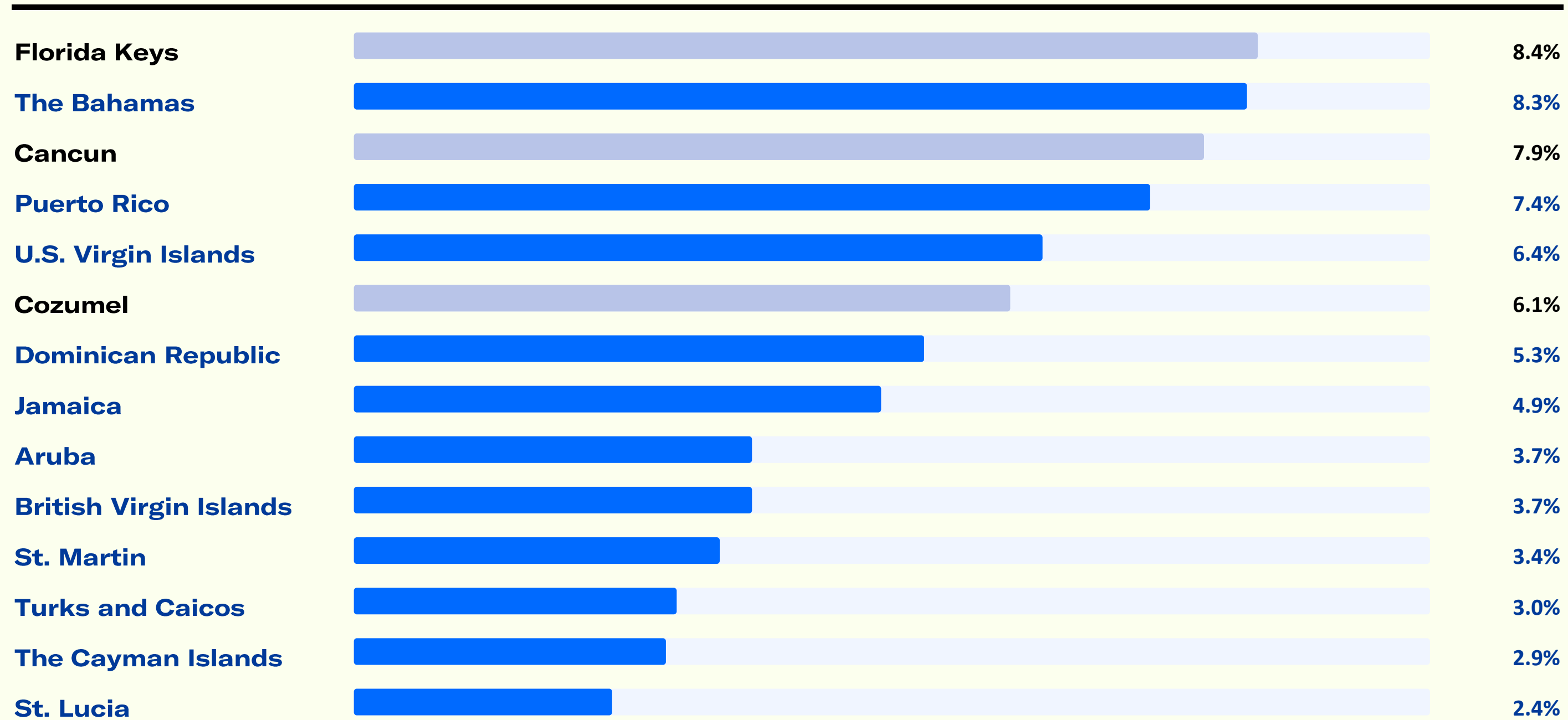
**The Caribbean as a
*Travel Destination***

Caribbean Visitation – Past 12 Months

Caribbean islands account for 9 of the top 14 island & beach destinations Americans visited — with The Bahamas and Puerto Rico landing in the top four overall.

% OF U.S. TRAVELERS · YTD AVG.

Caribbean Other destinations

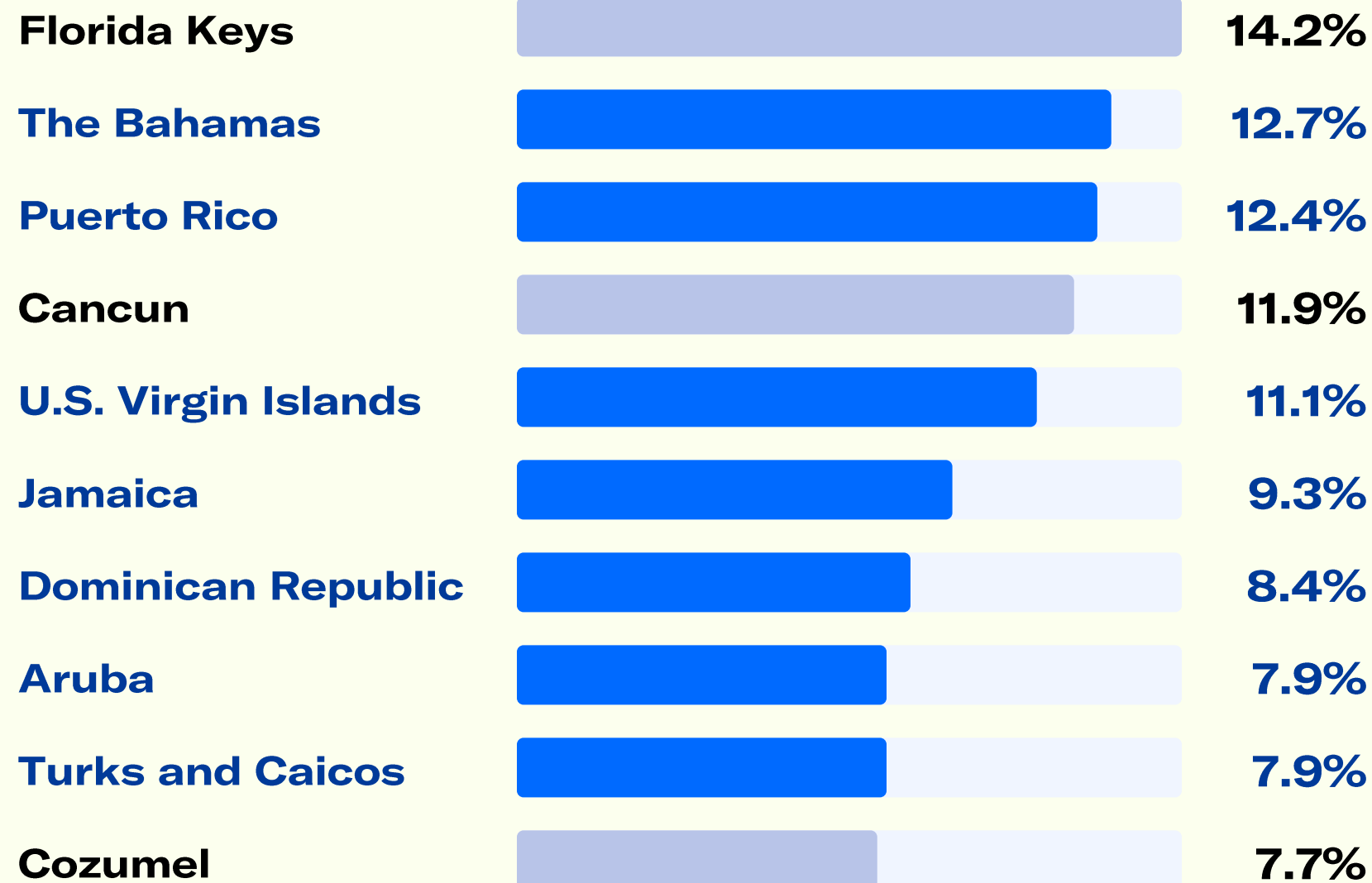


Source: State of the American Traveler (SATS) · Future Partners · 2026 YTD (Jan–Apr, n≈4,022)

Future Intent & Dream Destinations

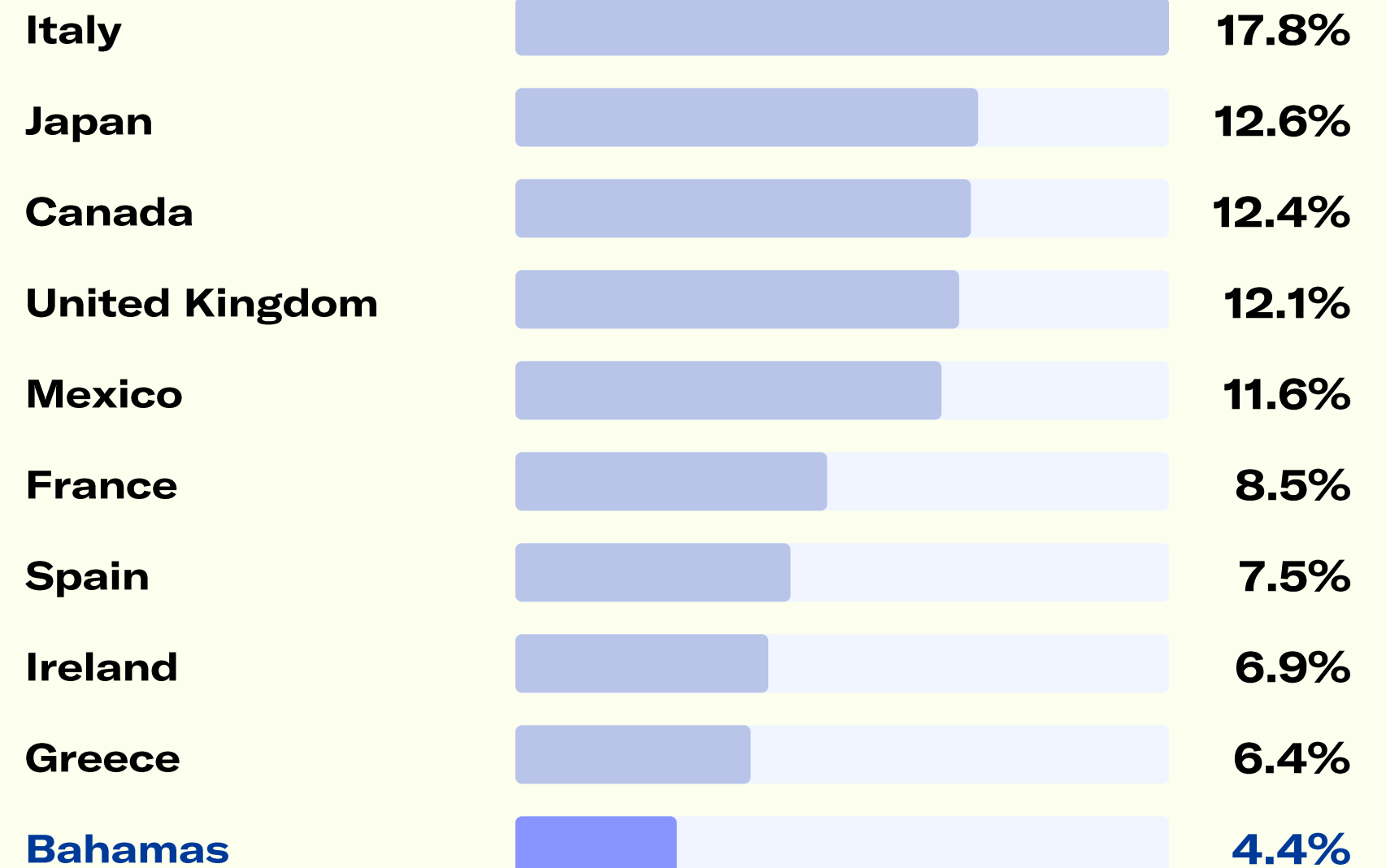
Likely to visit next 12 months

% of U.S. travelers · YTD avg.



Top foreign dream destinations (Unaided)

% of U.S. travelers · YTD avg.

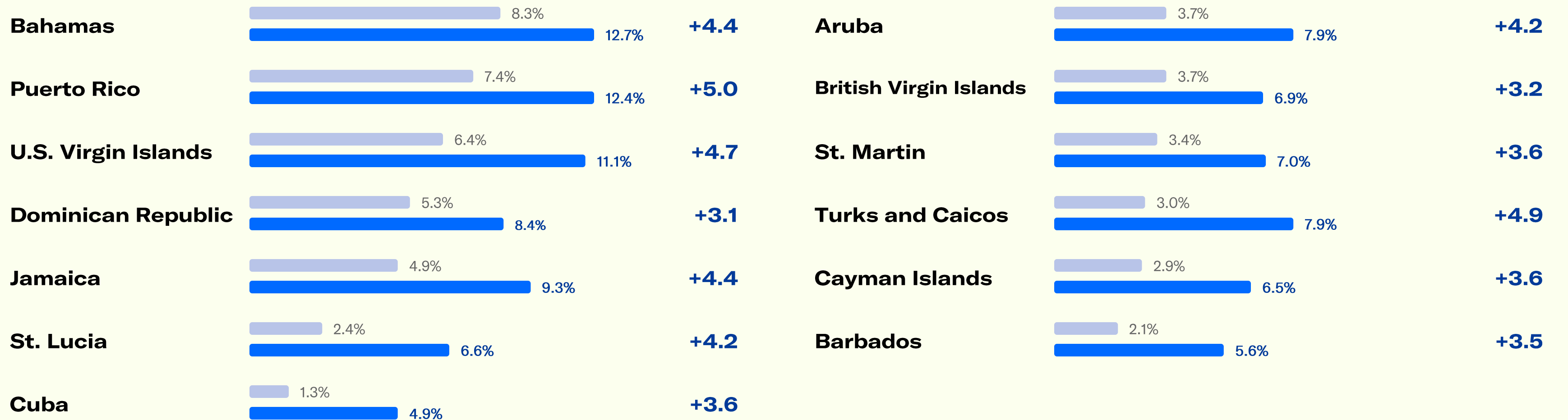


Future Intent & Dream Destinations

For every Caribbean island, more Americans plan to visit in the next 12 months than visited in the past 12 — a consistent, positive demand signal across the region.

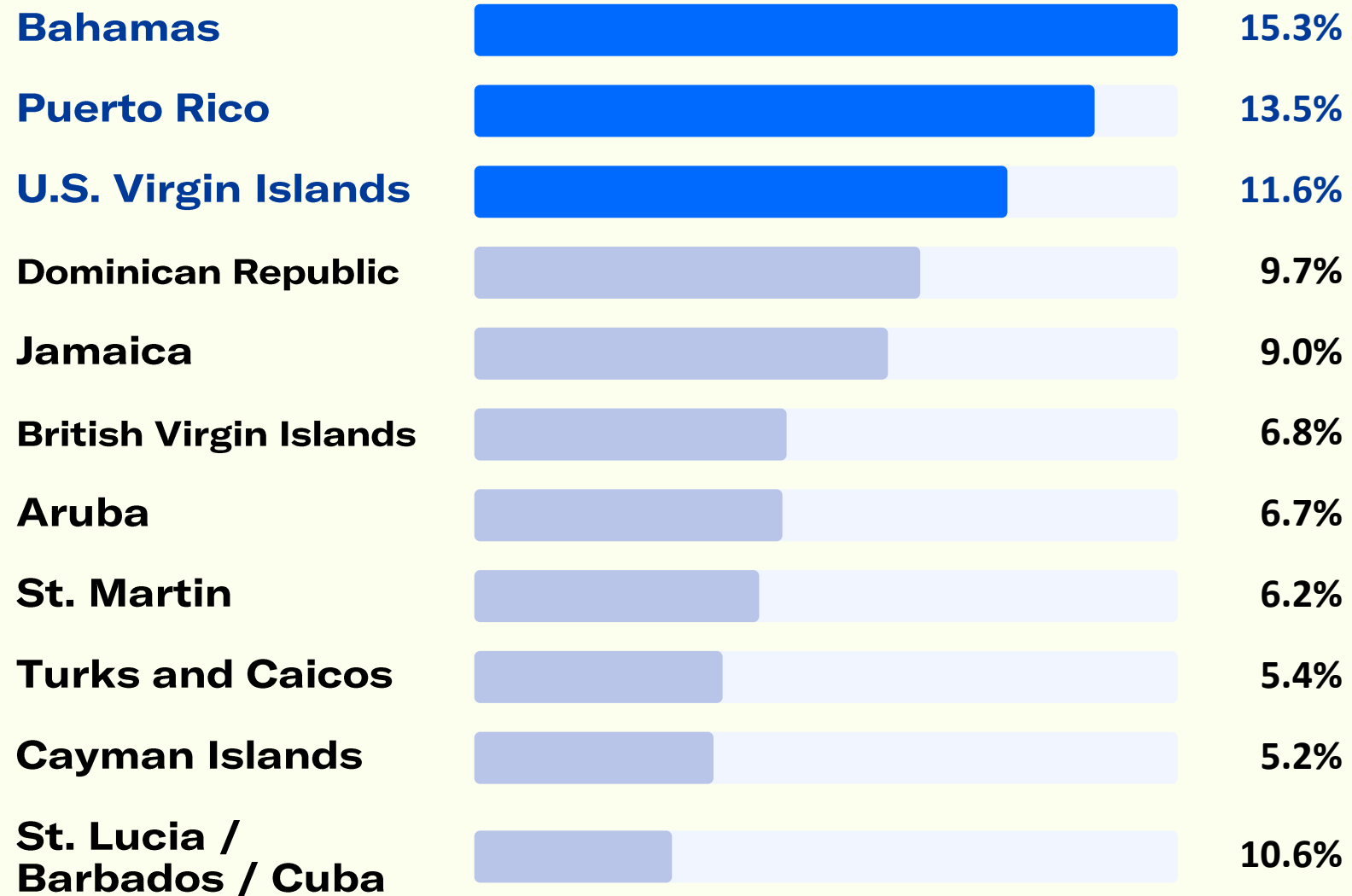
% OF U.S. TRAVELERS · YTD AVG.

■ Past 12 months (visited) ■ Next 12 months (likely)



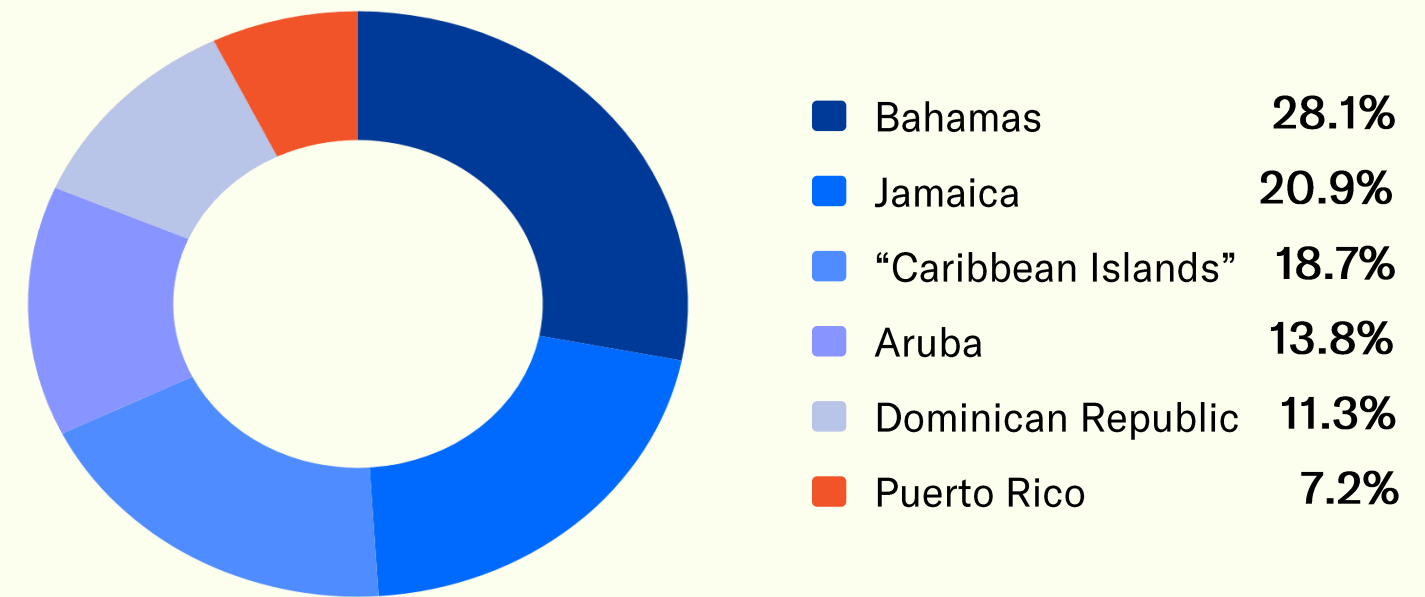
Share of Within-Caribbean Attention

Past 12 Months Visited



Top 3 capture ~40% of within-Caribbean attention for past visits.

Dream Destination Mentions (Unaided)



Bahamas + Jamaica alone command ~49% of Caribbean dream mentions.

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Demographic Index

HOW TO READ IT

$$\text{Index} = (\text{Sub-group \%}) \div (\text{Total \%}) \times 100$$

120+

Strong over-index
≥ 20% more likely
than the avg.
traveler.

110–119

Mild over-index
Somewhat more
likely than average.

90–109

On par
Roughly in line with
the average.

< 90

Under-index
Less likely than
average to travel
here.

Island Visitation by Age

Index 100 = U.S. traveler average. Blue = over-index (more likely). Orange = under-index. YTD avg. (Jan–Apr 2026).

DESTINATION	TOTAL %	GEN Z	MILLENNIAL	GEN X	BOOMER+
Bahamas	8.3%	113	98	122	86
Puerto Rico	7.4%	115	107	124	77
U.S. Virgin Islands	6.4%	92	108	103	91
Dominican Republic	5.3%	100	100	123	83
Jamaica	4.9%	96	116	114	82
Aruba	3.7%	78	89	111	100
British Virgin Islands	3.7%	119	108	119	78
St. Martin	3.4%	68	82	103	115
Turks and Caicos	3.0%	97	93	133	80
Cayman Islands	2.9%	83	97	110	97
St. Lucia	2.4%	113	92	113	92
Barbados	2.1%	152	100	114	86
Cuba	1.3%	246	177	100	38

Caribbean Regional Index

Index 100 = U.S. traveler average. Blue = over-index (more likely). Orange = under-index. YTD avg. (Jan–Apr 2026).

DESTINATION	TOTAL %	WEST	MIDWEST	NORTHEAST	SOUTH
Bahamas	8.3%	67	81	110	128
Puerto Rico	7.4%	74	85	131	112
U.S. Virgin Islands	6.4%	78	78	109	120
Dominican Republic	5.3%	64	96	136	109
Jamaica	4.9%	73	90	104	122
Aruba	3.7%	65	73	162	105
British Virgin Islands	3.7%	81	70	130	116
St. Martin	3.4%	71	85	115	121
Turks and Caicos	3.0%	70	77	117	123
Cayman Islands	2.9%	76	90	93	124
St. Lucia	2.4%	100	71	108	108
Barbados	2.1%	86	67	133	114
Cuba	1.3%	100	54	123	123

Future Intent by Age + Region

Index 100 = U.S. traveler average. Blue = over-index (more likely). Orange = under-index. YTD avg. (Jan–Apr 2026).

DESTINATION	TOTAL %	GENERATION				U.S. REGION			
		GEN Z	MILLENNIAL	GEN X	BOOMER+	WEST	MIDWEST	NORTHEAST	SOUTH
Bahamas	12.7%	123	123	118	69	67	87	102	126
Puerto Rico	12.4%	181	140	102	62	69	90	122	115
U.S. Virgin Islands	11.1%	114	118	115	75	71	87	105	123
Jamaica	9.3%	148	149	111	54	72	97	105	117
Dominican Republic	8.4%	165	137	114	58	68	90	112	119
Aruba	7.9%	138	128	109	71	75	82	148	105
Turks and Caicos	7.9%	147	138	118	56	78	80	109	120
St. Martin	7.0%	146	127	109	71	79	83	113	119
British Virgin Islands	6.9%	148	143	104	61	86	83	107	113
St. Lucia	6.6%	173	145	111	55	79	80	114	118
Cayman Islands	6.5%	165	142	105	63	83	77	103	123
Barbados	5.6%	155	152	114	50	86	80	118	112
Cuba	4.9%	227	173	98	37	92	71	114	112

Unaided Destination Recall

DESTINATION	TOTAL %	GEN Z	MILL.	GEN X	BOOM+	WEST	MW	NE	SOUTH
Bahamas	4.4%	91	100	120	84	48	116	91	132
Jamaica	3.3%	67	100	127	85	42	127	109	121
"Caribbean Islands"	2.9%	7	62	100	148	69	128	110	107
Aruba	2.2%	100	68	114	114	23	82	200	109
Dominican Republic	1.8%	106	78	144	83	33	117	111	133
Puerto Rico	1.1%	145	100	100	100	55	82	136	136

200 INDEX

Northeast → Aruba

Northeast travelers are **twice as likely** as the average to write in Aruba — a regional affinity that should inform media targeting.

148 INDEX

Boomer+ → "Caribbean Islands"

Boomers are nearly **50% more likely** than average to write in "Caribbean Islands" generically — a brand-awareness opportunity for individual islands.

145 INDEX

Gen Z → Puerto Rico

Gen Z over-indexes strongly on Puerto Rico — the island's cultural currency with younger travelers is real and growing.

Today's Agenda



The American Traveler Right Now

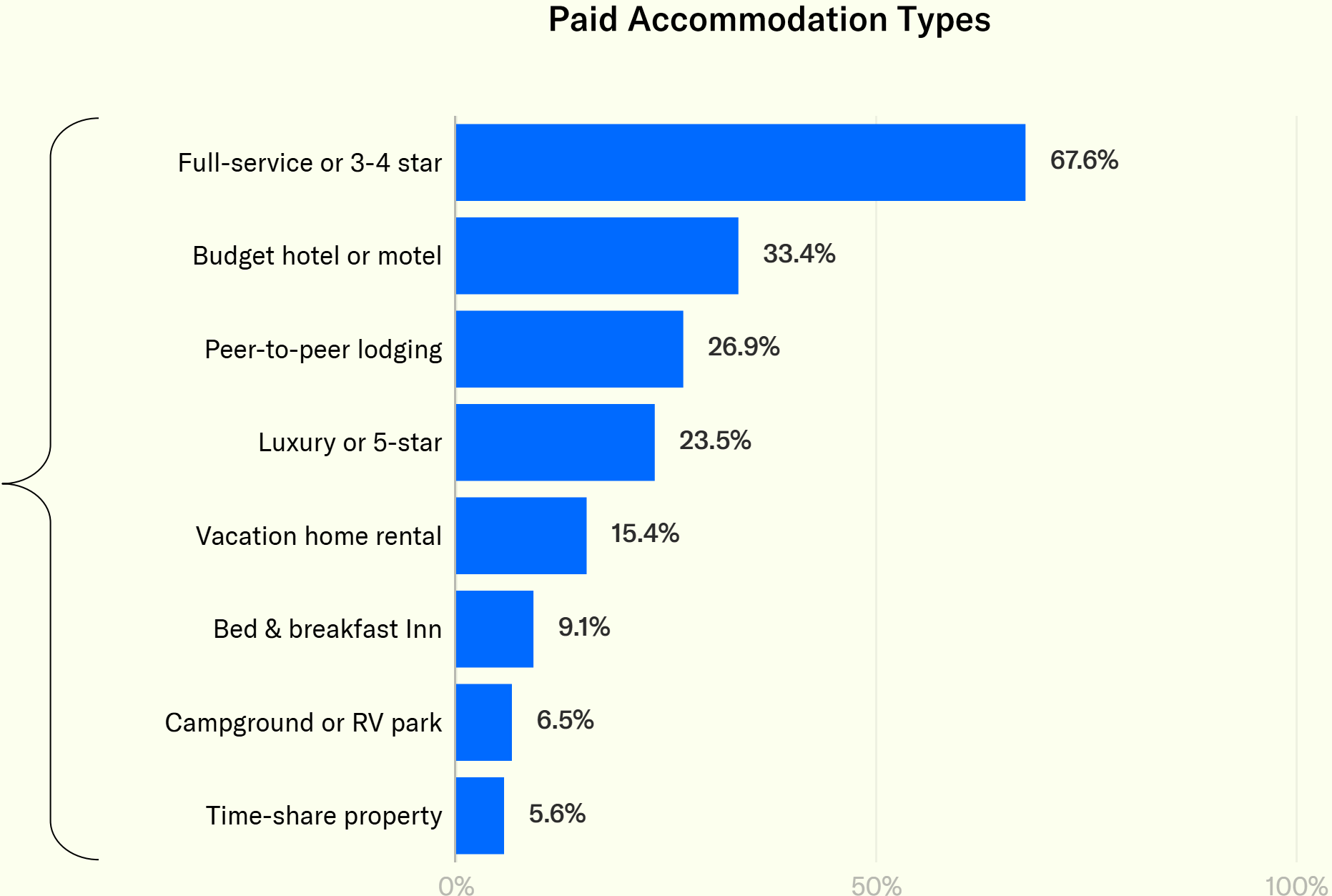
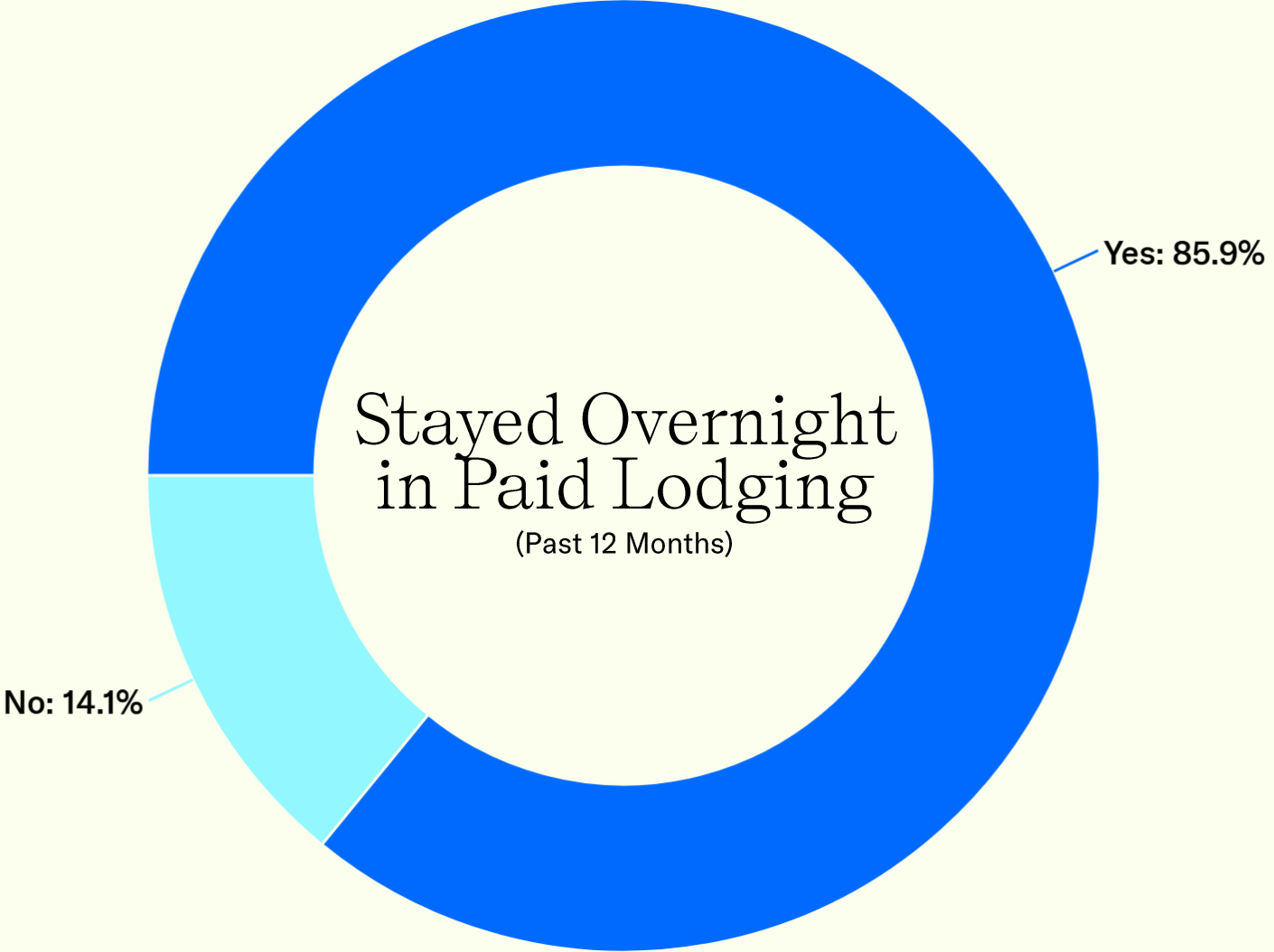
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What This Means for Your Property

American Travelers' Typically Lean Towards Full-Service 3 or 4-Star Hotel Properties



Question 1: In the PAST 12 MONTHS, on any trips have you STAYED OVERNIGHT IN ANY PAID LODGING (i.e., a hotel, motel, inn, vacation rental, Airbnb type rental, etc.)?

Question 2: In the PAST 12 MONTHS, which type of paid lodging have you stayed in? (Select all that apply)

Off-Season Travelers

- Took at least one overnight leisure trip during the off-season in the past 12 months
- 85.6% of off-season travelers have also taken trips during the peak season

Dispersal Travelers

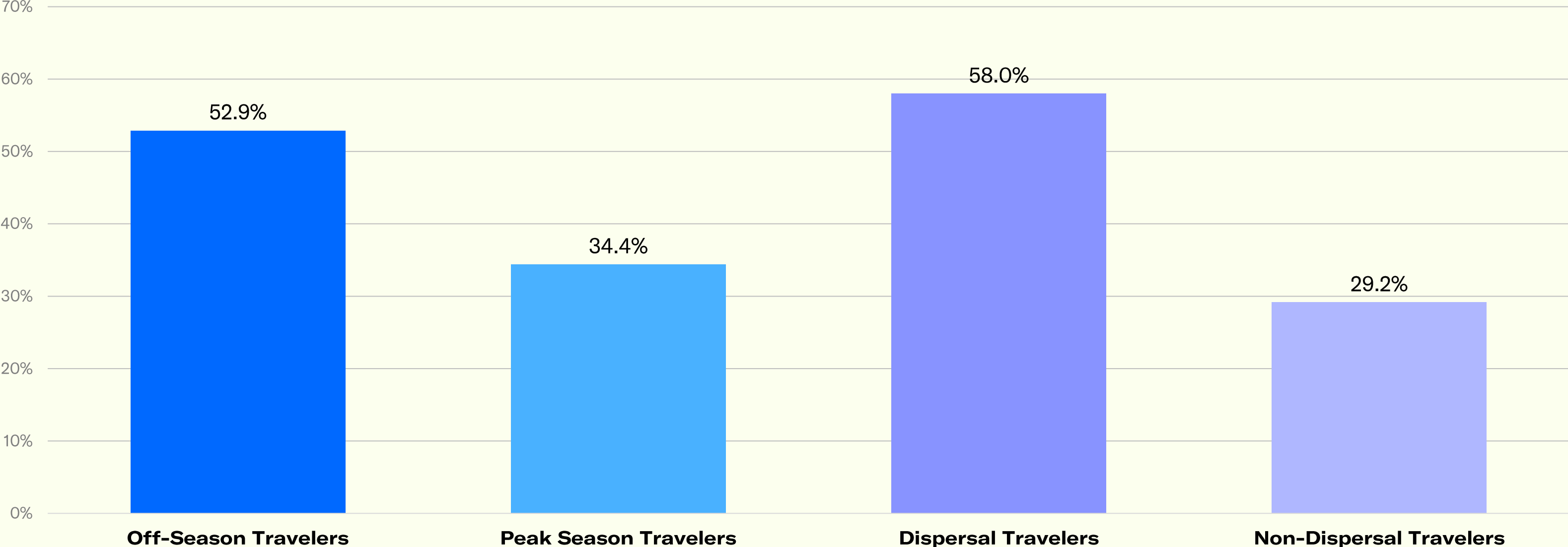
- Traveled to lesser-known destinations or attractions in the past 2 years for at least some of their trips



Dispersal and Off-Season Travelers are Looking at International Travel at a Much Higher Rate

Question: How likely are you to travel outside the United States for leisure in the NEXT TWELVE (12) MONTHS?

% Very Likely or Likely



Off-Season and Dispersal Travelers Report Higher Average Household Incomes

Question: Which best describes the combined annual income of all members of your household?

Average Annual Household Income



Dispersal and Off-Season Travelers are Much More Adventurous

Question: How adventurous do you consider yourself to be while traveling?

% Extremely Adventurous or Very Adventurous



Media, Inspiration & Planning by Destination Type



Beach

Low-effort inspiration, low-friction planning



City

High-information, high-inspiration travelers



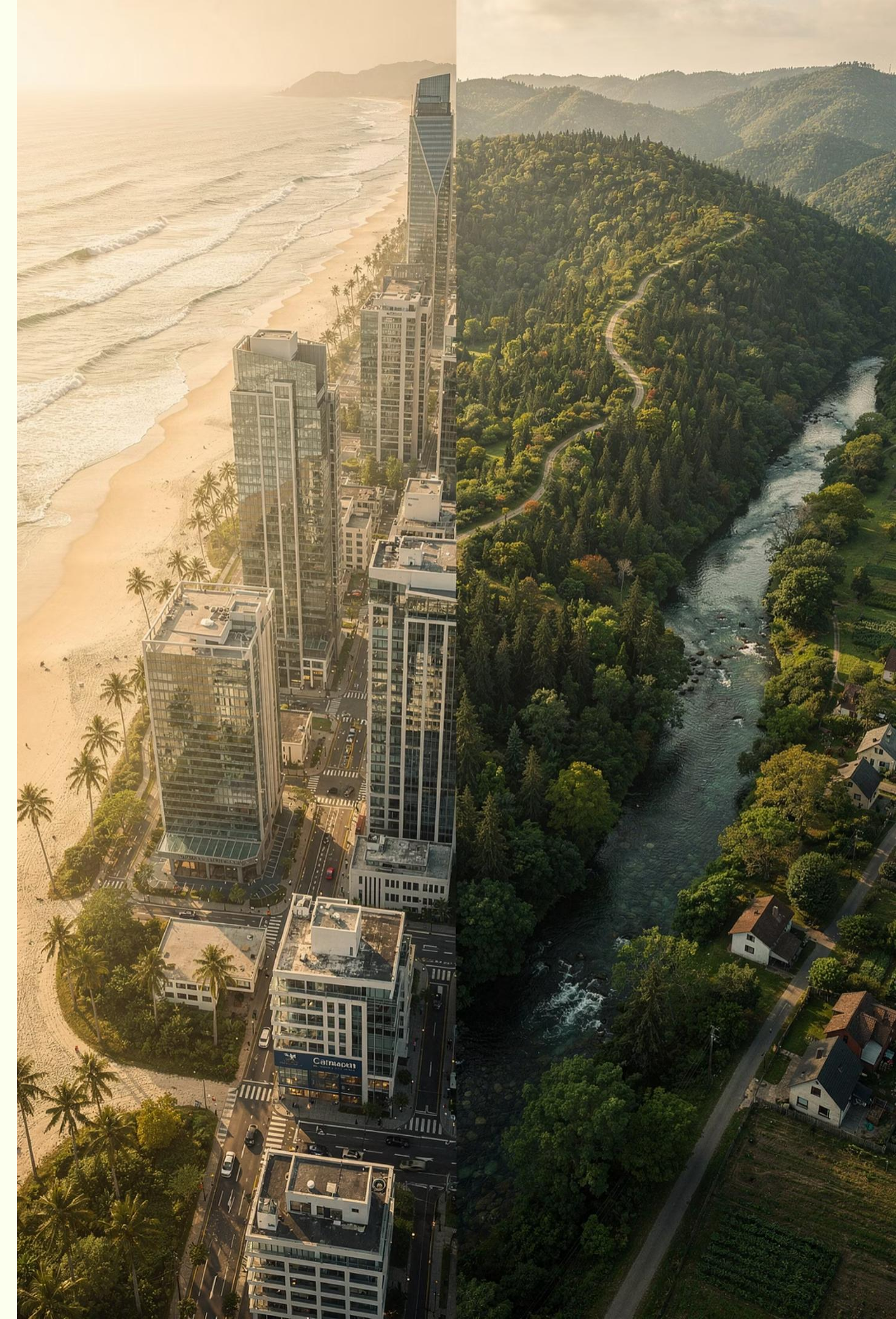
Nature / Park

Intentional, research-driven planners



Small Town / Rural

Discovery + trust-driven planning



Destination Choice in Summary : Different Motivations, Different Risk Assessments

Travel Motivations & Decision Questions by Trip Type

BEACH TRIPS » "I want to unwind"

- Primary driver: Relaxation (~70%+)
- Top priority: Beaches/water (~85%)
- Key concern: Heat & hurricanes (~40–55%)

👉 Decision: *"Will this feel easy, relaxing, and stress-free?"*

NATURE TRIPS » "I want something meaningful"

- Primary driver: Nature connection (~75%)
- Top priorities: Parks (~80%), scenic drives (~65%)
- Key concern: Wildfires (~45%)

👉 Decision: *"Is this unique, authentic, and worth the effort?"*

CITY TRIPS » "I want to experience more"

- Primary driver: Exploration & culture (~60–65%)
- Top priorities: Food scene (~70%), culture, nightlife
- Key concern: Crowds (~65%)

👉 Decision: *"How much can I do, see, and experience?"*

SMALL TOWN TRIPS » "I want something different (but easy)"

- Primary drivers: Relaxation + discovery
- Top priorities: Hidden gems (~65%), family-friendly (~50%)
- Lower risk sensitivity overall

👉 Decision: *"Is this simple, enjoyable, and a little off the radar?"*

Beach Travelers

Low-effort Inspiration, Low-friction Planning

◆ Top Inspiration Sources

- **Friends & family recommendations (very high)**
- **Social media (Instagram, TikTok)**
- **Travel deal sites**

Heavily driven by: *"That looks relaxing / I heard it's great"*

◆ Media Patterns

Visual-first:

- **Instagram**
- **TikTok**
- **Influencer content performs well**
- **Less research-heavy content**

◆ Planning Resources

- **OTAs (Expedia, Booking, etc.)**
- **Package deals**
- **Airline + hotel bundles**

Planning style: Fast, simplified, price-aware



City Travelers

High-information, High-inspiration Travelers

◆ Top Inspiration Sources

- Online research (Google, travel guides)
- Social media
- Travel websites / editorial content

Driven by: *"What's there to do? What's trending?"*

◆ Media Patterns

Mix of:

- Social (discovery)
- Search (validation)

Heavy use of:

- Lists
- "Top things to do"
- Food/travel content

◆ Planning Resources

Multiple platforms used:

- Google search
- Review sites (TripAdvisor, Yelp)
- Maps
- Less reliance on packages

Planning style: Iterative, research-heavy, optimized

Key Insight

City travelers are: **Active planners and information maximizers**

Nature/Park Travelers

Intentional, Research-driven Planners

- ◆ Top Inspiration Sources
 - **Word of mouth (trusted sources)**
 - Travel long-form content
 - Search (destination-specific research)

Driven by: *"I want to go somewhere meaningful"*

- ◆ Media Patterns
 - Less social-driven
 - More: YouTube, Blogs, Guides
- ◆ Planning Resources
 - **Direct research (park sites, official resources)**
 - Itinerary planning tools
 - Maps, logistics-heavy tools

Planning style: Deliberate, detail-oriented, effort-accepting

Small Town / Rural

Discovery + Trust-driven Planning

- ◆ Top Inspiration Sources
 - **Word of mouth (very high)**
 - "Hidden gem" content
 - Social (but less influencer-heavy)

◆ Media Patterns

Discovery-oriented:

- Blogs
- Niche content
- Less mainstream travel media

◆ Planning Resources

Mix of:

- OTAs (for basics)
- Direct/local research

Planning style: Light planning, but curiosity-driven

Emerging Trends Shaping Travel



No films, no music, no sleep: Is 'raw-dogging' long flights heroic or foolish?

10 August 2024

share save Add BBC

Lucy Hooker
business reporter, BBC News



Damion Bailey says he likes the 'challenge' of avoiding in-flight entertainment, films, books or music.

Last week, Damion Bailey posted on Instagram that he had just achieved his "personal best" – a 13-and-a-half hour flight between Shanghai and Dallas without any in-flight entertainment, films, books or music.

"It's quite tough, honestly," the 34-year-old from Miami, Florida tells BBC News. But he keeps doing it.

Mr Bailey is part of a new travel trend, known as "raw-dogging", where passengers spend long hours mid-air just staring straight ahead.

The longer you do it, the tougher you have apparently proven yourself to be.

"Just raw-dogged it, 15 hour flight to Melbourne," boasts Australian music producer Torren Foot on TikTok, blinking hard as if to stay awake.

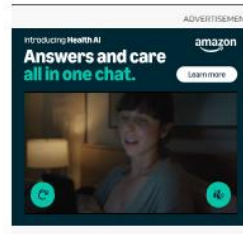
"No music, no movies, just flight map."

Some also avoid eating or drinking. A few say they won't get up at all, even to use the toilet. But health experts warn that more extreme versions of the trend can pose serious risks.

Manchester City footballer Erling Haaland recently joined the trend, posting that he had got through a seven-hour flight with "no phone, no sleep, no water, no food" and had found it "easy".

Responses on social media questioned if he had really stuck to his own rules (a common question on similar posts from others). Some wondered if he was a robot.

And some simply asked "why"?



TRAVEL

'Naked flying' is the new 'raw-dogging': Keep up with airline trends that save you time, money

Exclusive

Full-Time Traveler Explains Why She 'Raw-Dogs' Every Flight, Even When It's Over 16 Hours (Exclusive)

Ceirra Pipher, 29, says she uses her spare time on planes to think about her expectations for a trip or, on the way home, review fond memories

By **Zoey Lyttle** | Published on February 13, 2026 09:00AM EST

6 COMMENTS



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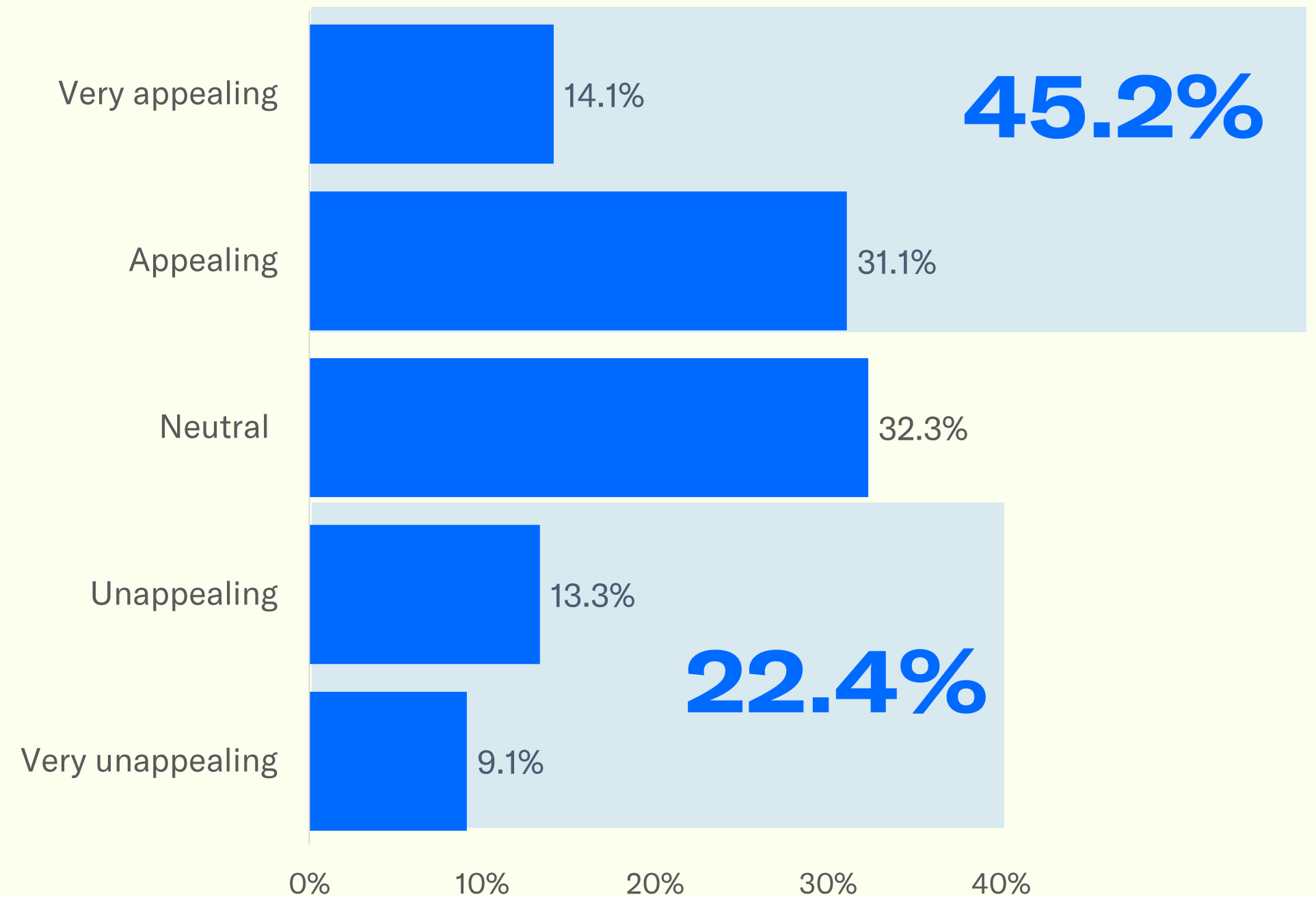
Hotel-As-Destination Travel

...refers to travel motivated mainly by the hotel experience, with the hotel or resort serving as the central reason for the trip.



Hotel-As-Destination Travel: When the Hotel *Is* the Vacation.

Question: How appealing do you find the idea of HOTEL-AS-DESTINATION travel in 2026?



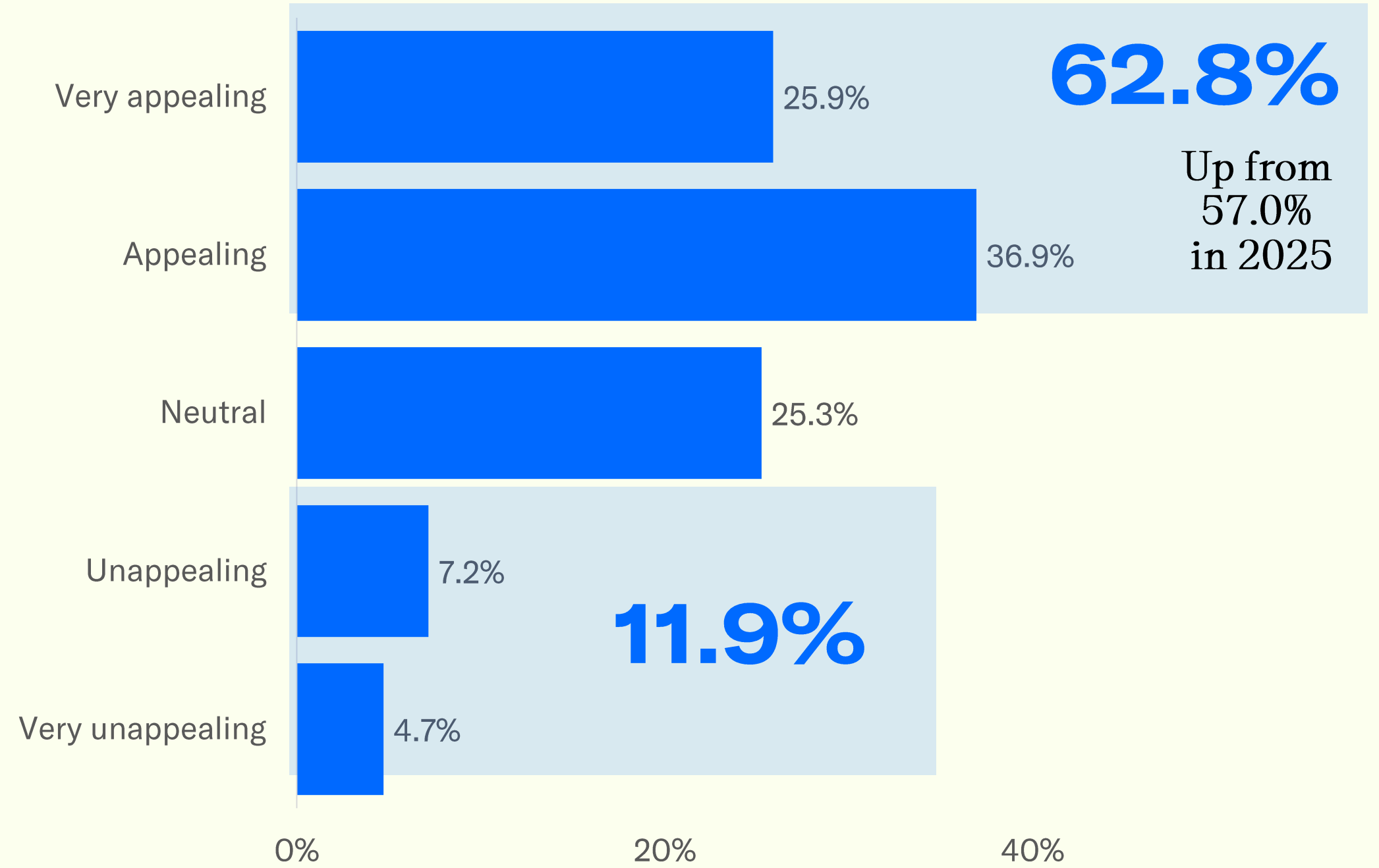
Foodie Trips

...traveling to explore
destinations known for their
food and drink experiences.



From Street Eats to Michelin Feasts, Travelers Keep Wanting Food-Driven Trips

Question: How appealing is the idea of taking foodie trips in 2026?



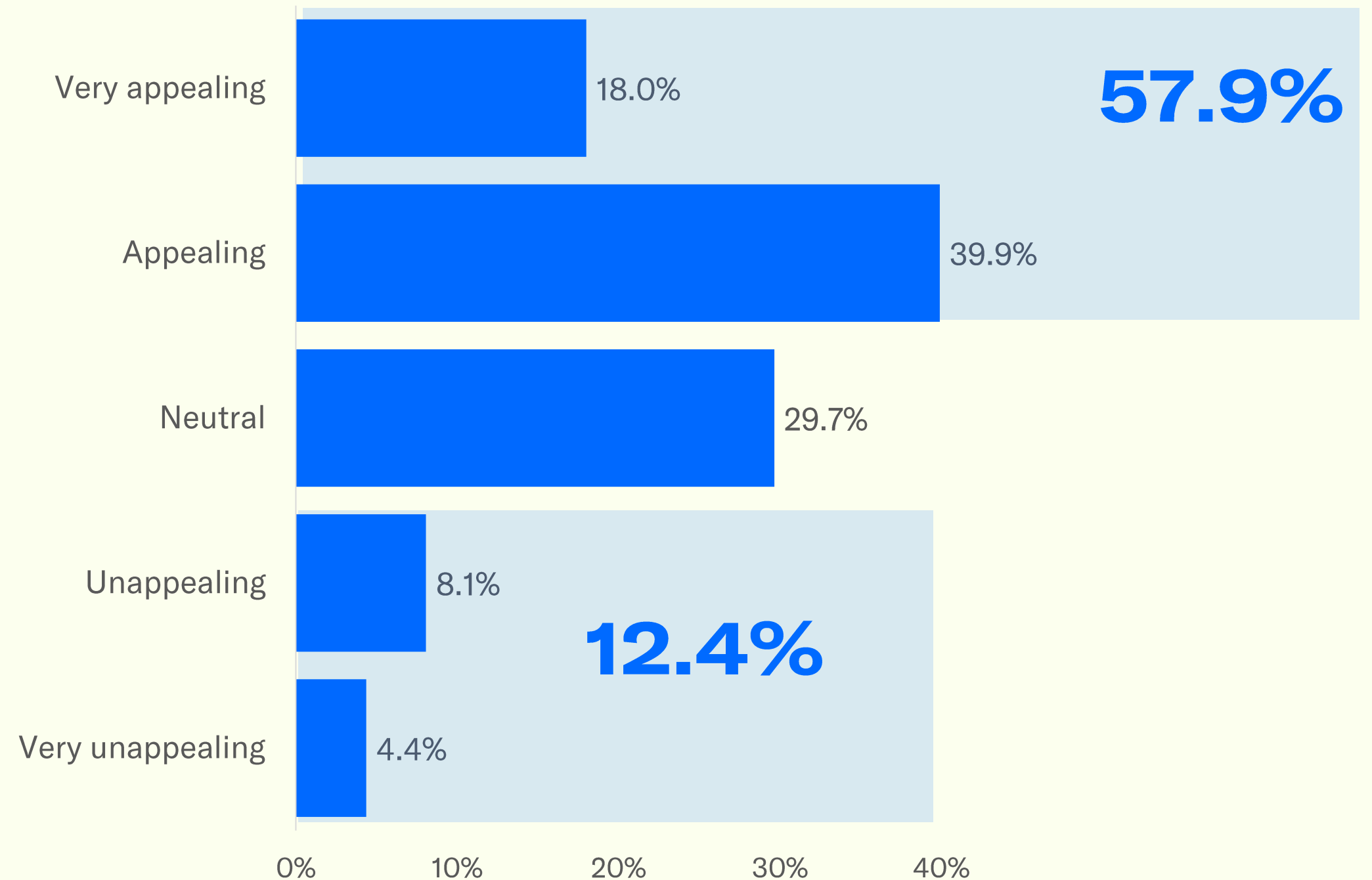
Slowcations

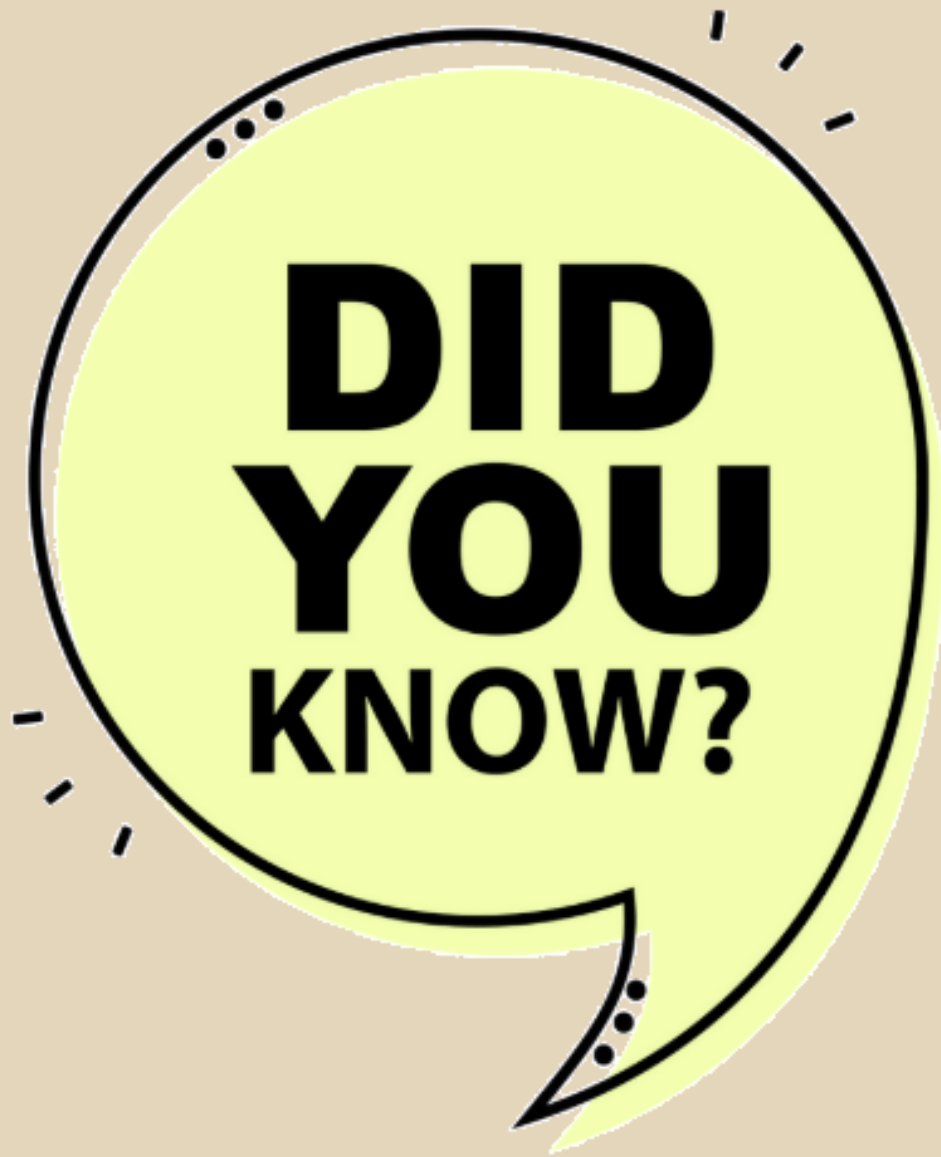
...leisurely and immersive travel, focusing on quality over quantity. It encourages deep connection with a destination by spending more time there, engaging with the local culture, environment, and community.



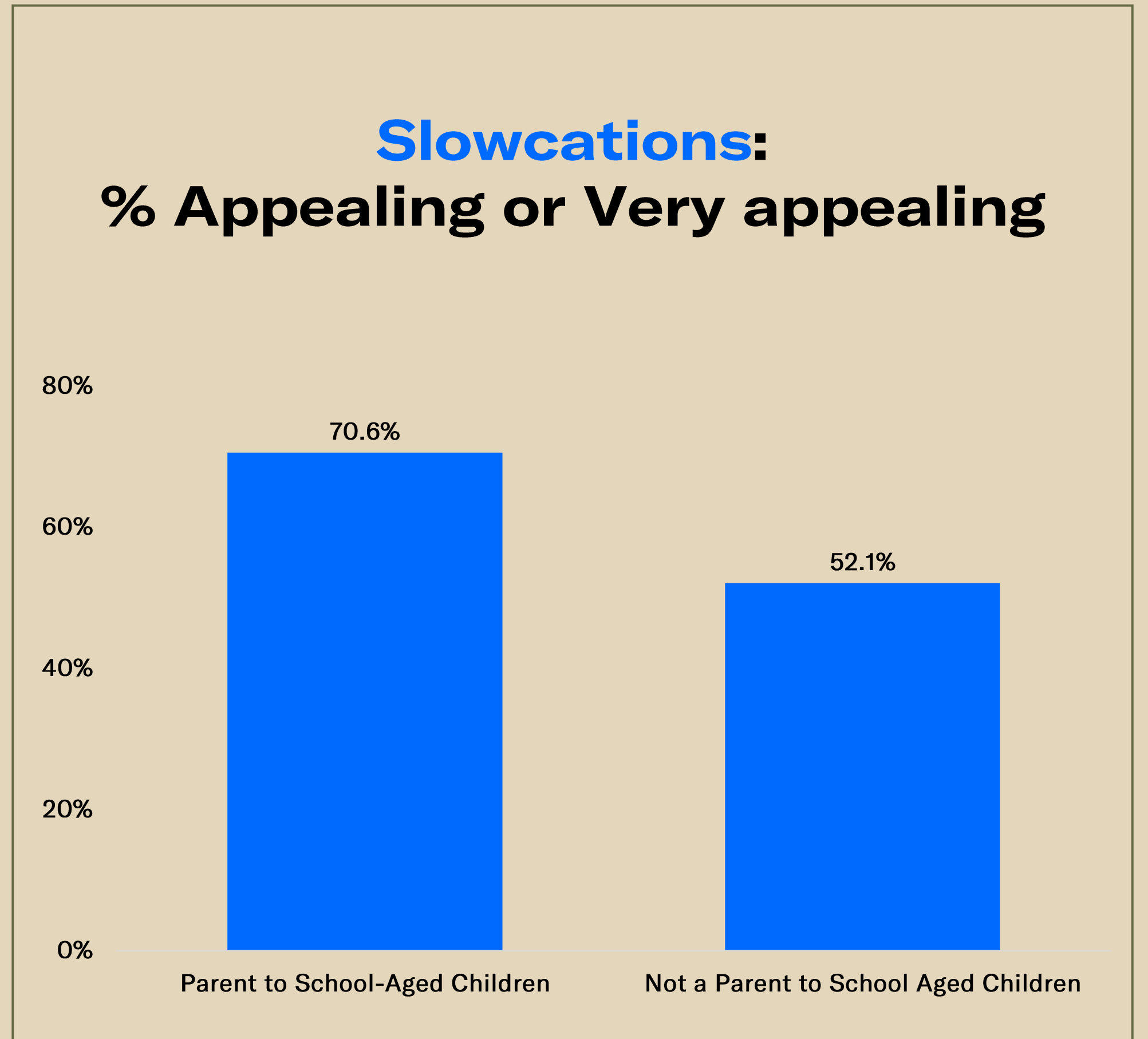
The Slowcation Appeal Continues to be Strong

Question: How appealing is the idea of staying in one destination for an extended period to relax and immerse yourself in local culture in 2026?





Family travelers also like the idea of slow travel.



A photograph of a person sleeping in a bed in a dimly lit room. The person is lying on their side, covered with a white sheet and a dark blanket. A nightstand next to the bed holds a digital clock displaying '1:47', a glass of water, and a lamp with a white shade. The room is softly lit, creating a calm and restful atmosphere.

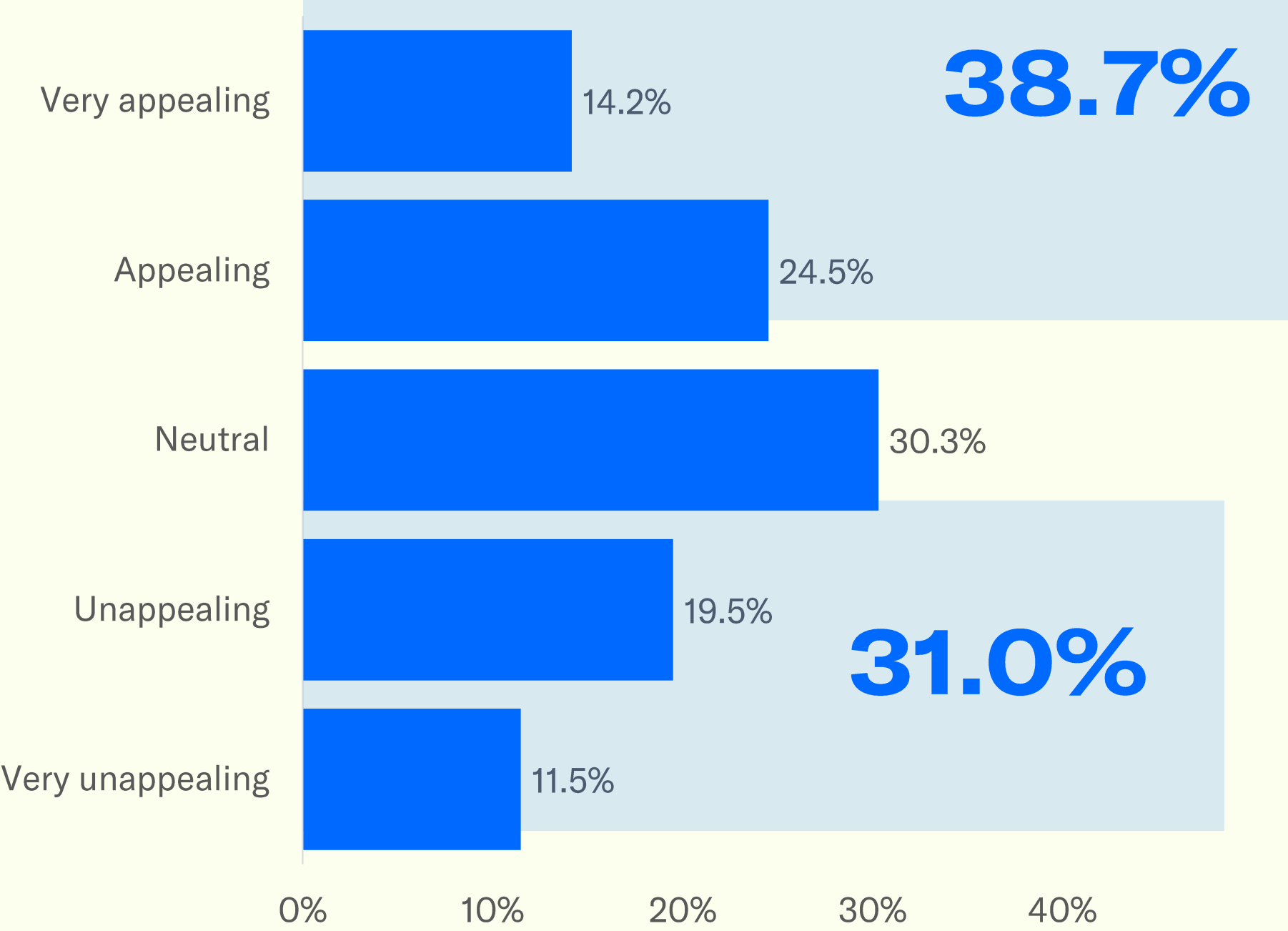
Sleep Tourism

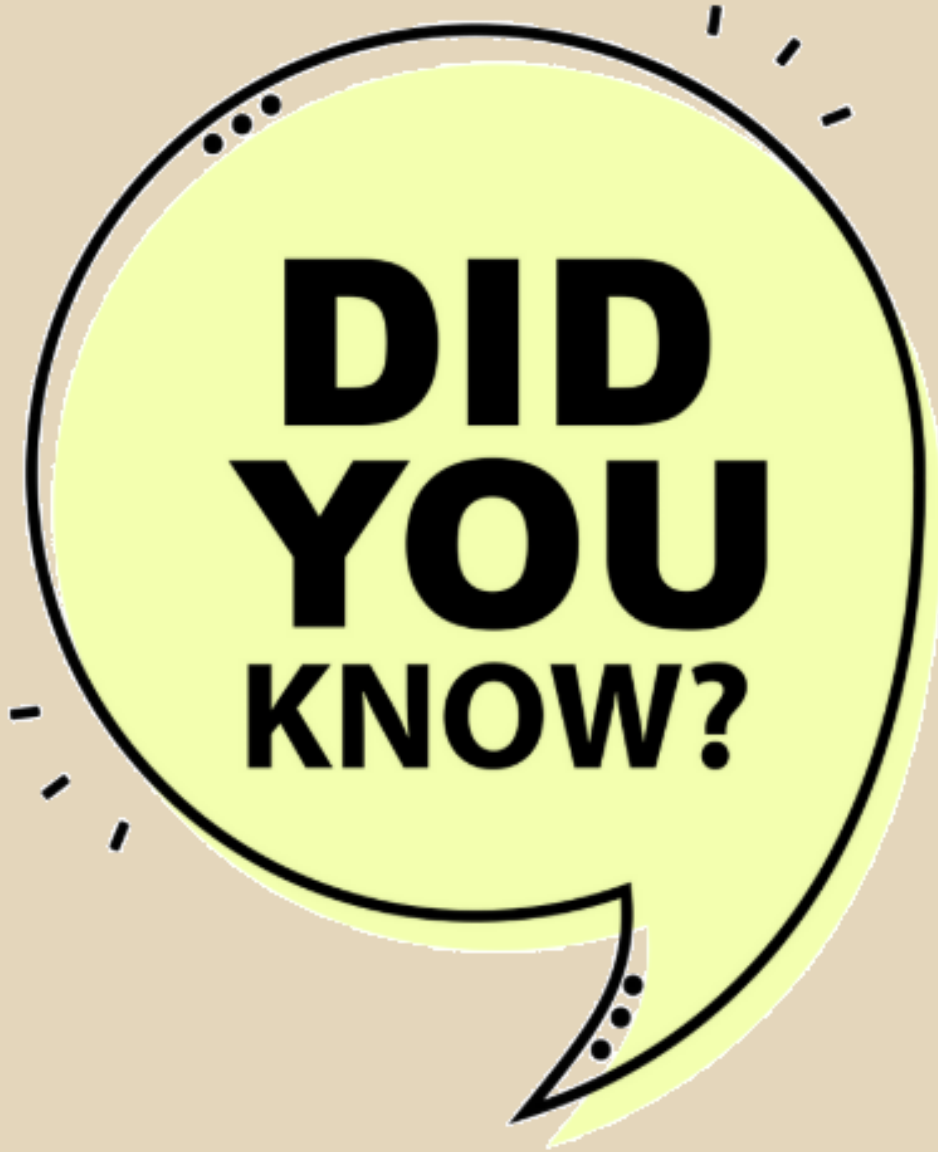
...trips focused on rest,
relaxation, and improving
your sleep in 2026?



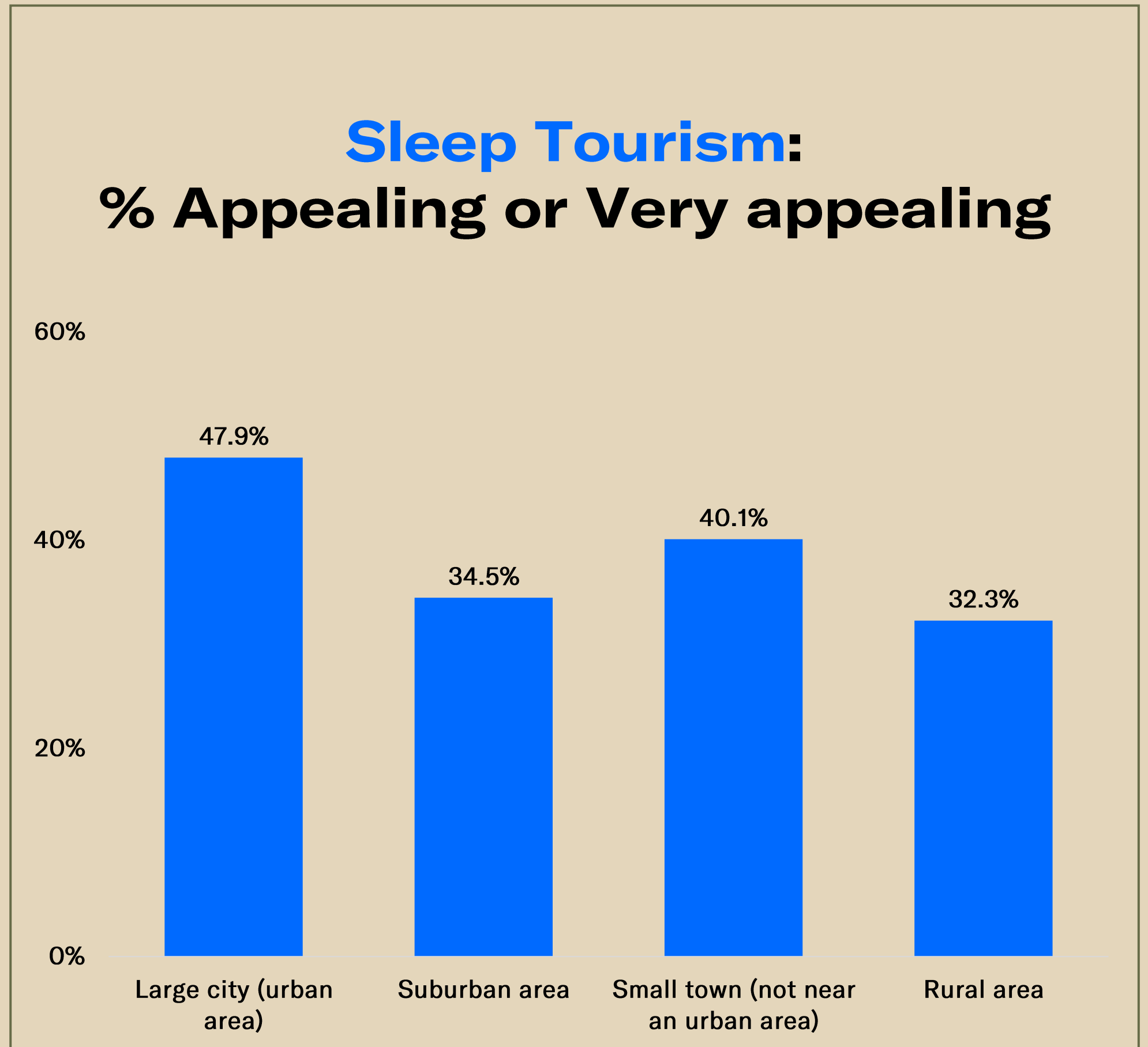
Is Rest the New Luxury? Many Americans Want a Vacation and a Snooze.

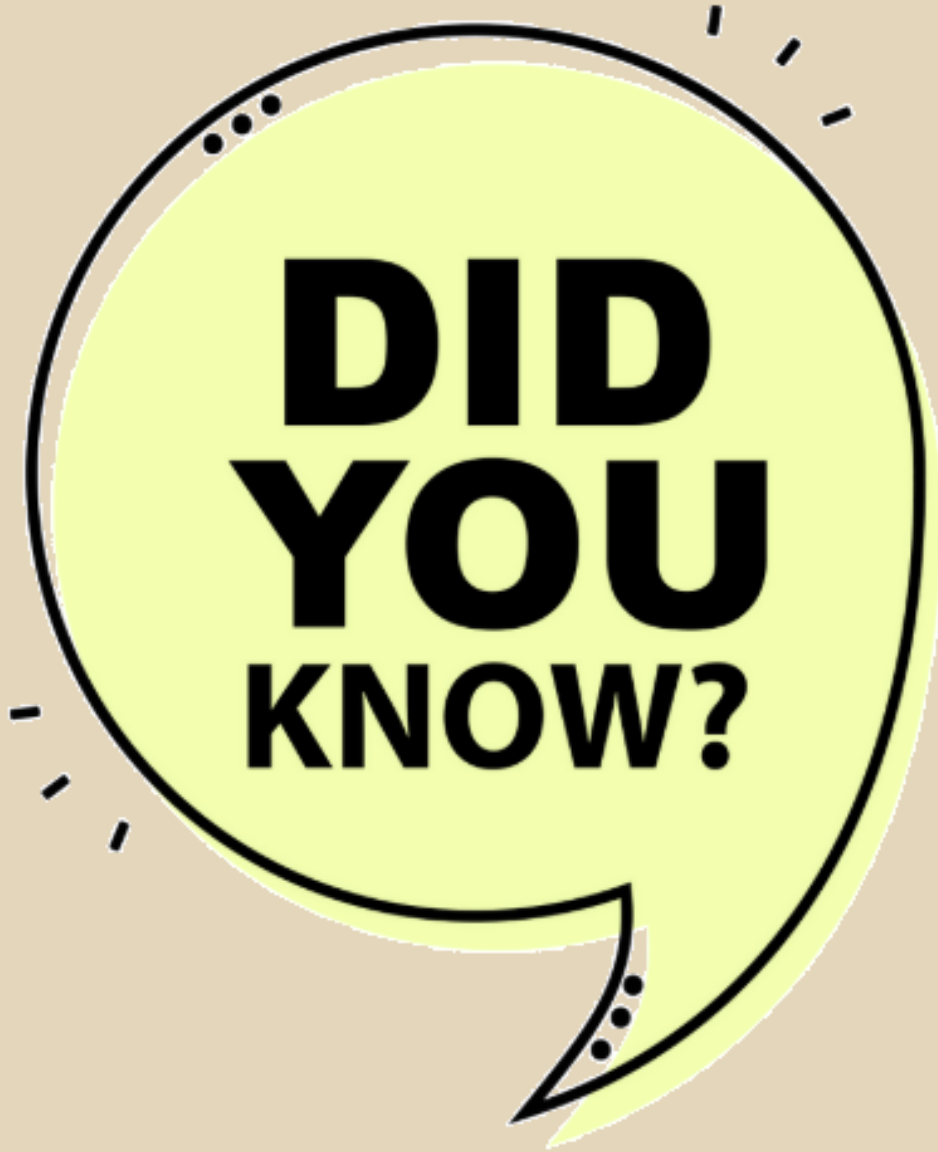
Question: How appealing is the idea of trips focused on rest, relaxation, and improving your sleep in 2026?



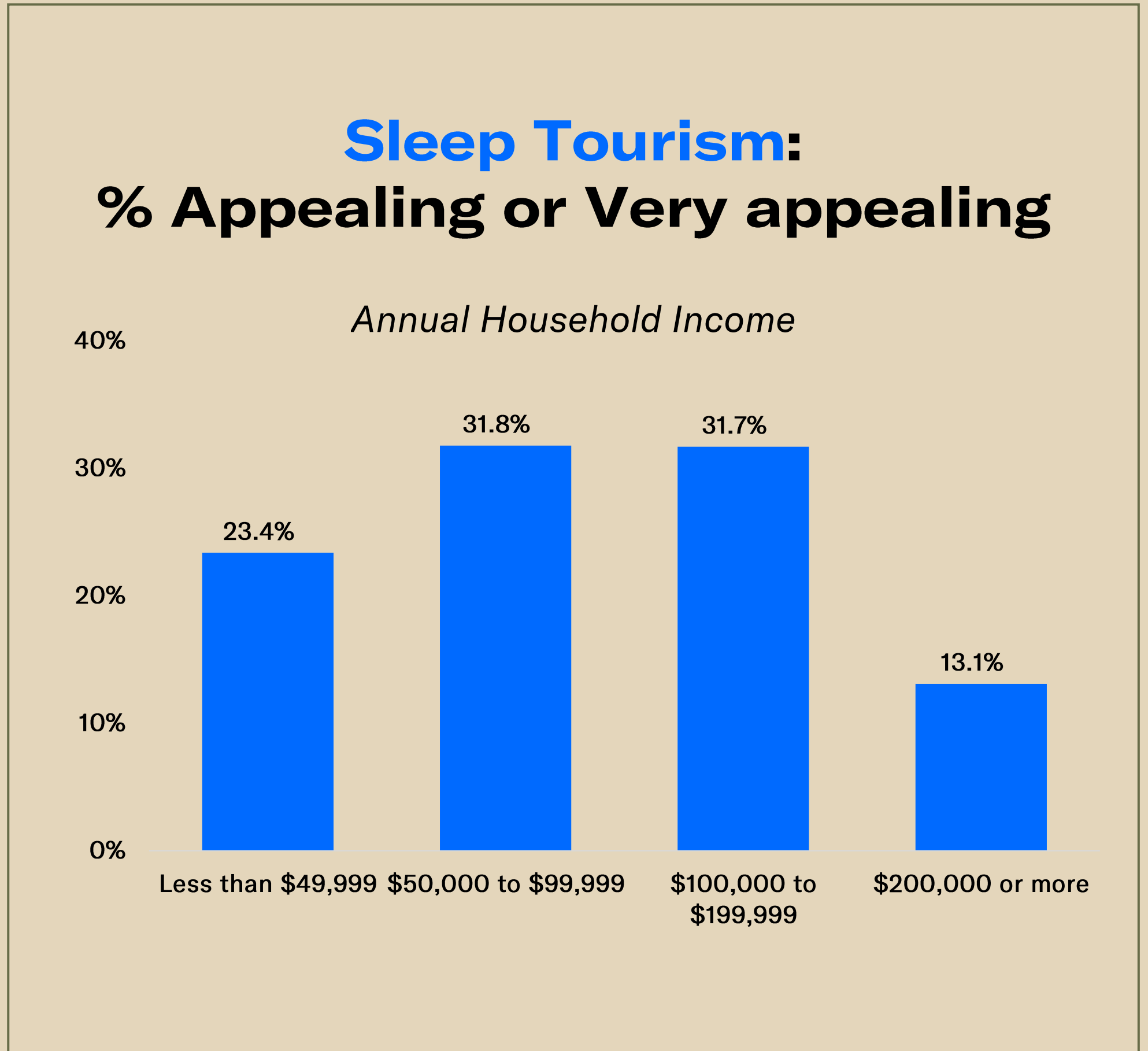


City folk and small towners need more sleep.





**Middle income
bands need more
sleep than others.**



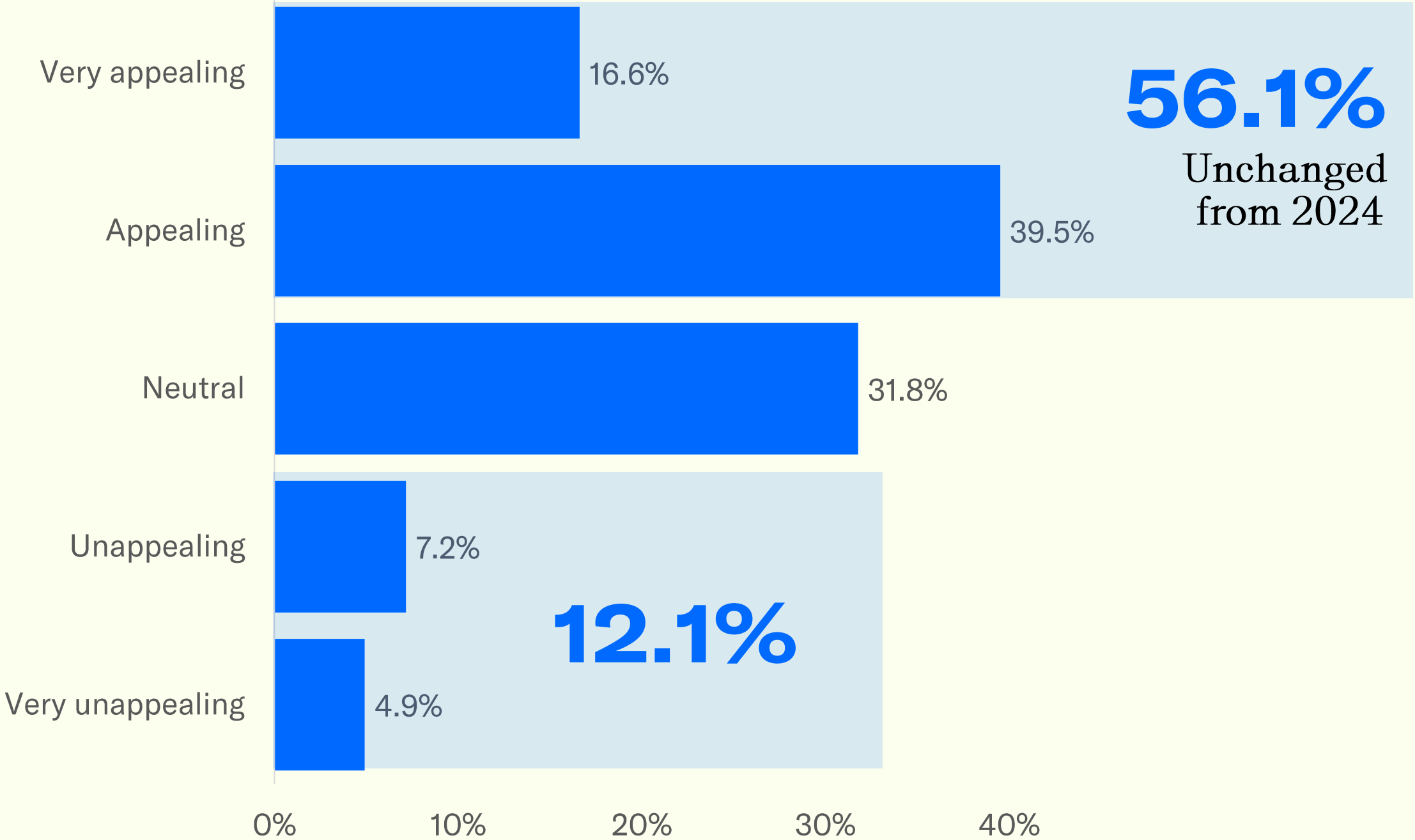
Experiential Travel

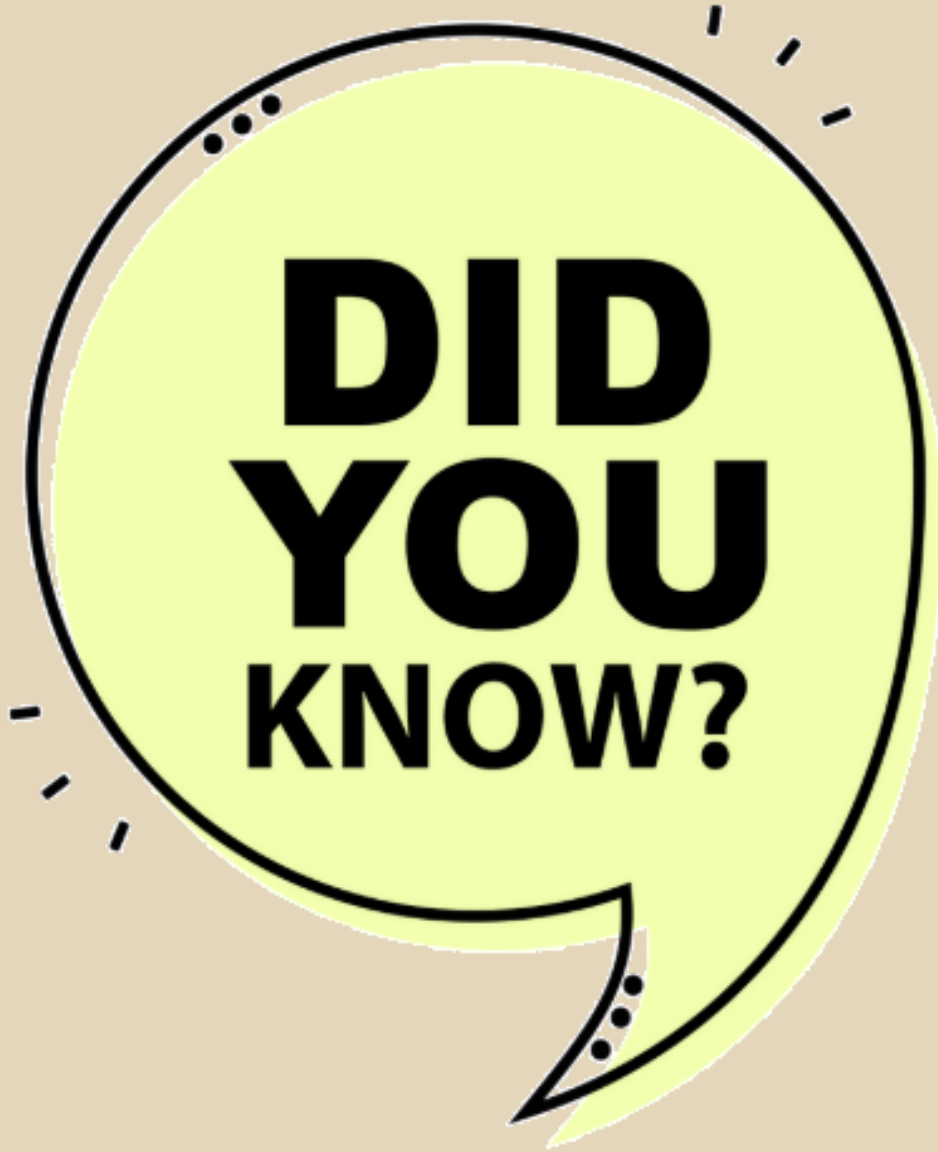
...participating in immersive, hands-on experiences that connect you with a destination's culture, history, or environment.



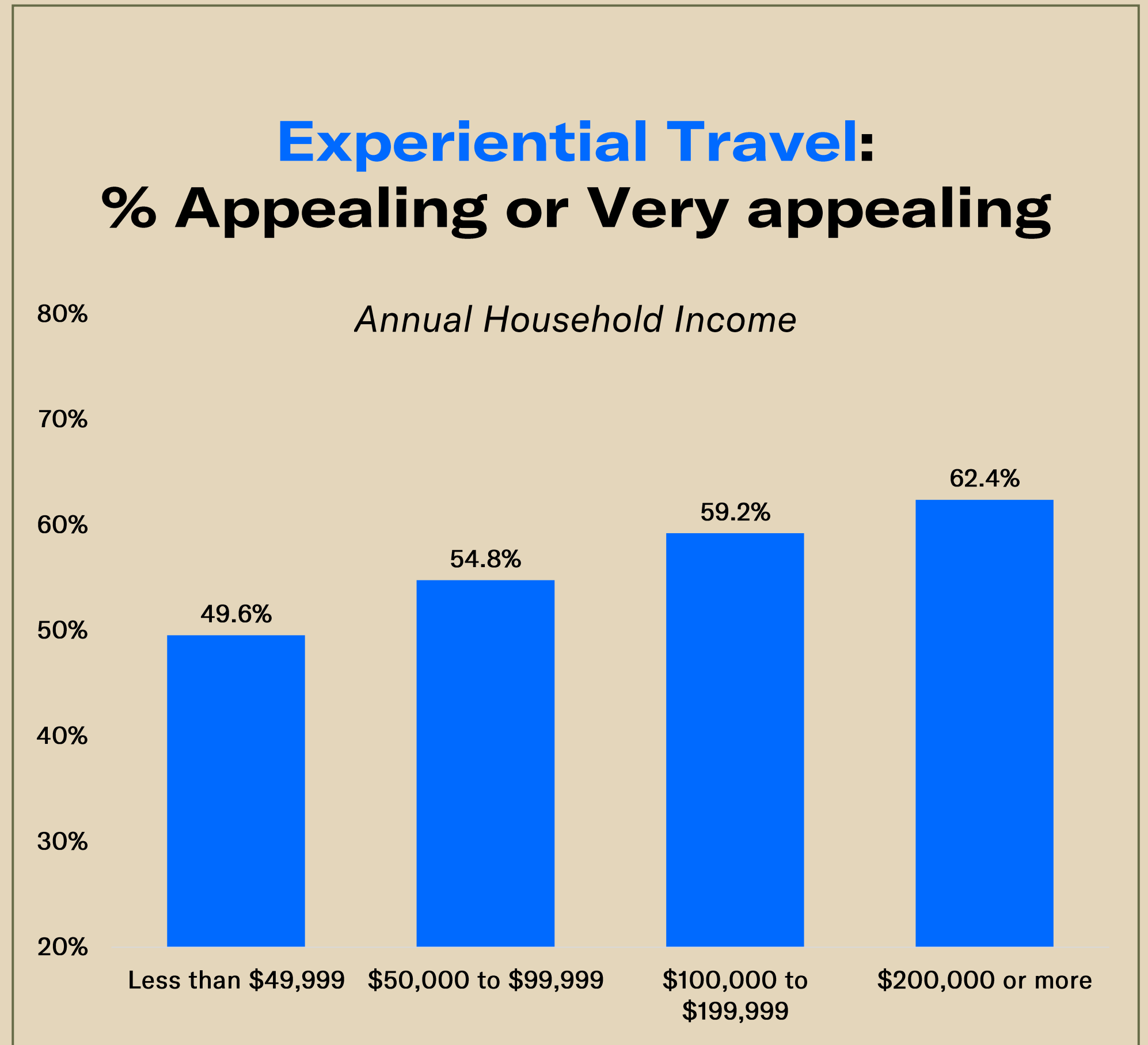
Experiential Travel: Hands-On Experiences Win Travelers' Hearts

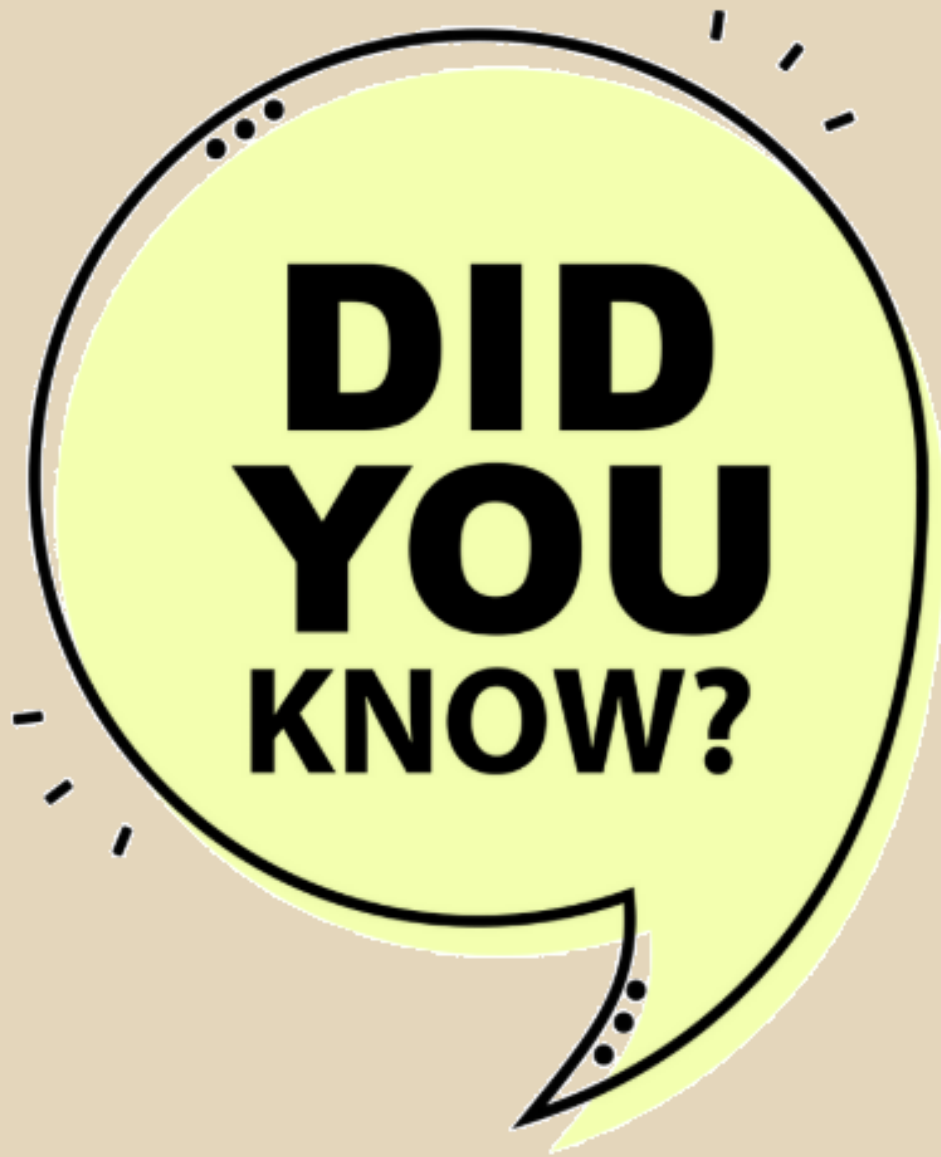
Question: How appealing is the idea of participating in immersive, hands-on experiences that connect you with a destination's culture, history, or environment in 2026?





When marketing experiential travel, think affluent travelers.





**And they have the
highest travel
budgets for 2026**

**Experiential Travelers:
Maximum Annual Travel Budget**

\$7,130

vs. \$6,210 for the average
American Traveler

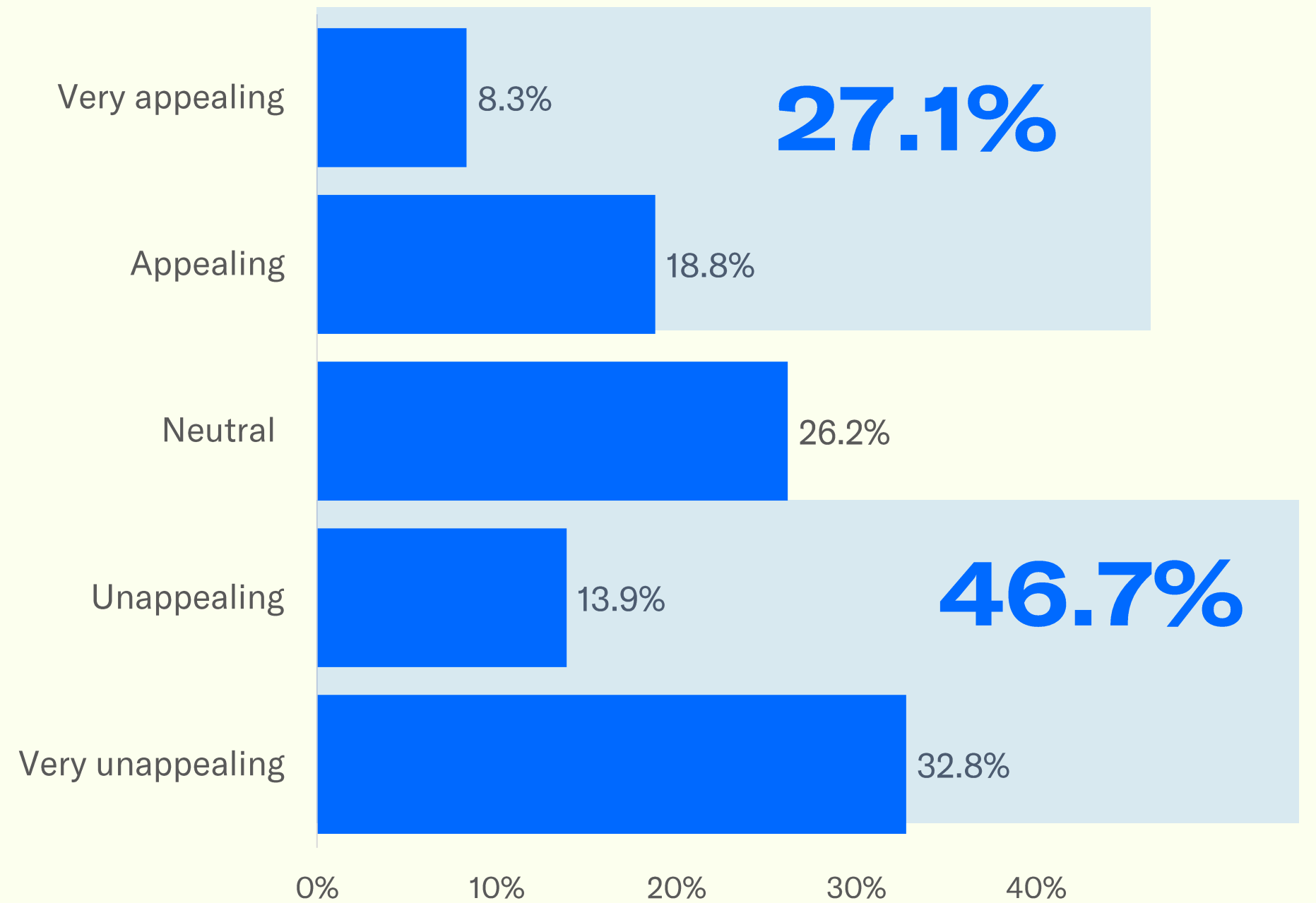
Connection Travel

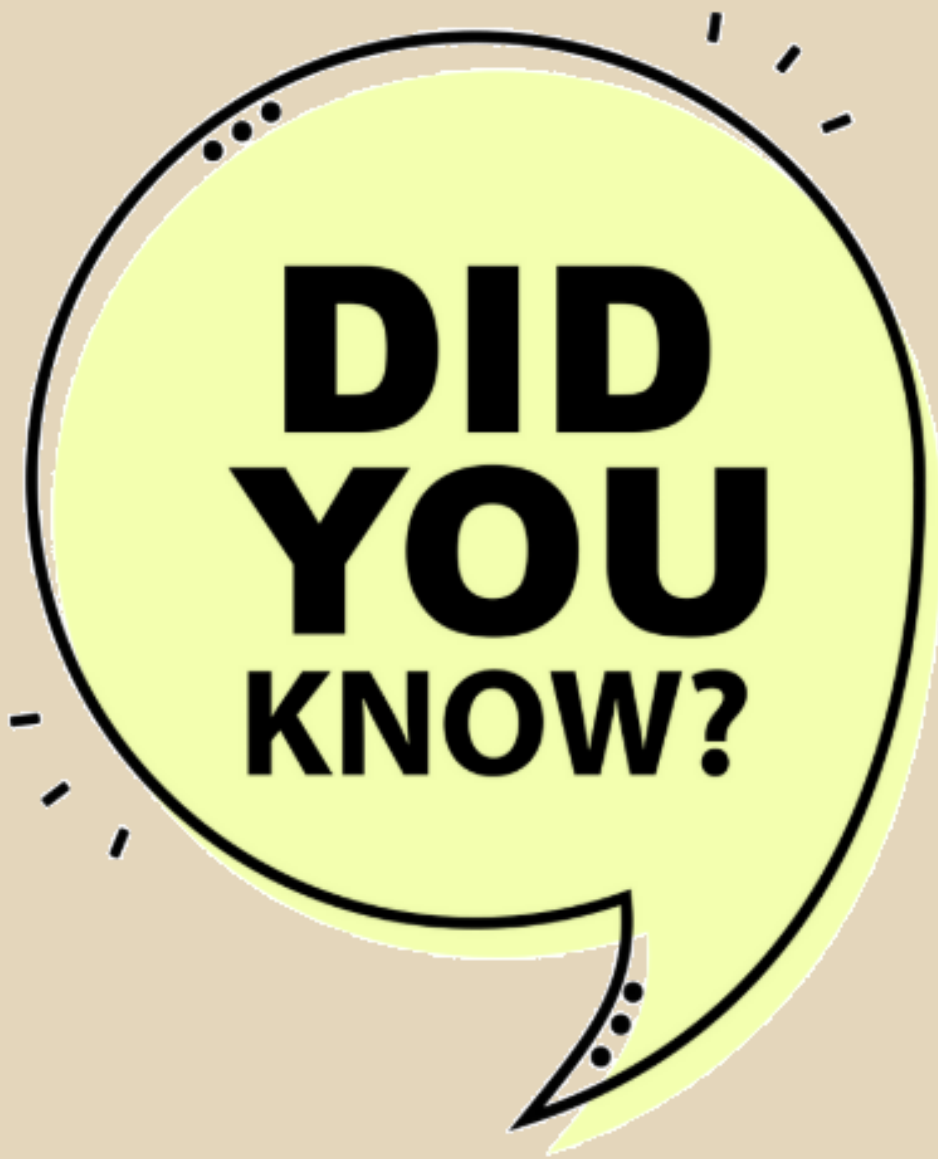
...refers to trips taken specifically to meet face-to-face for the first time a new friend or romantic partner you first met online.



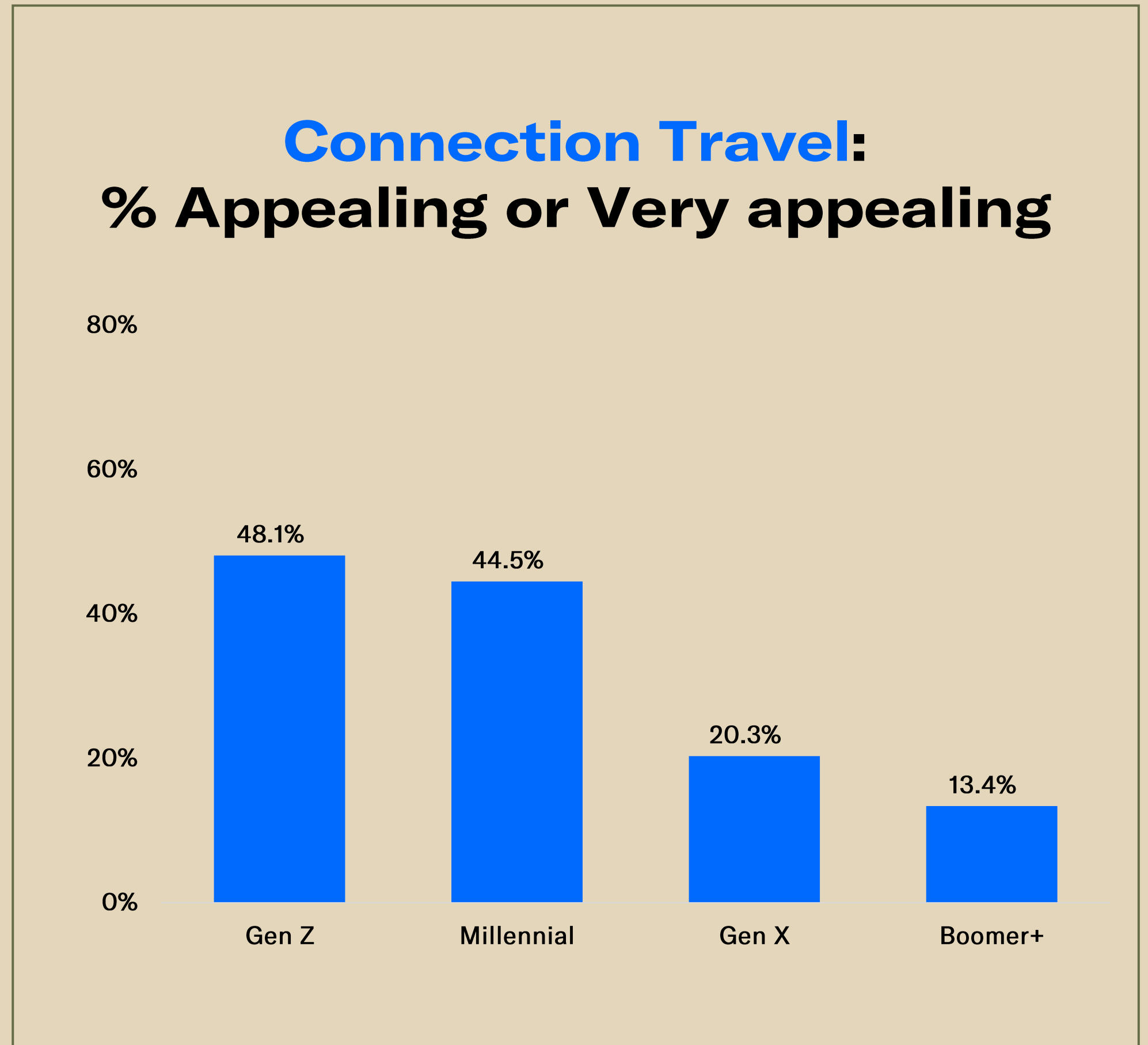
Connection Travel: Love at First Flight? Young Travelers Say Yes.

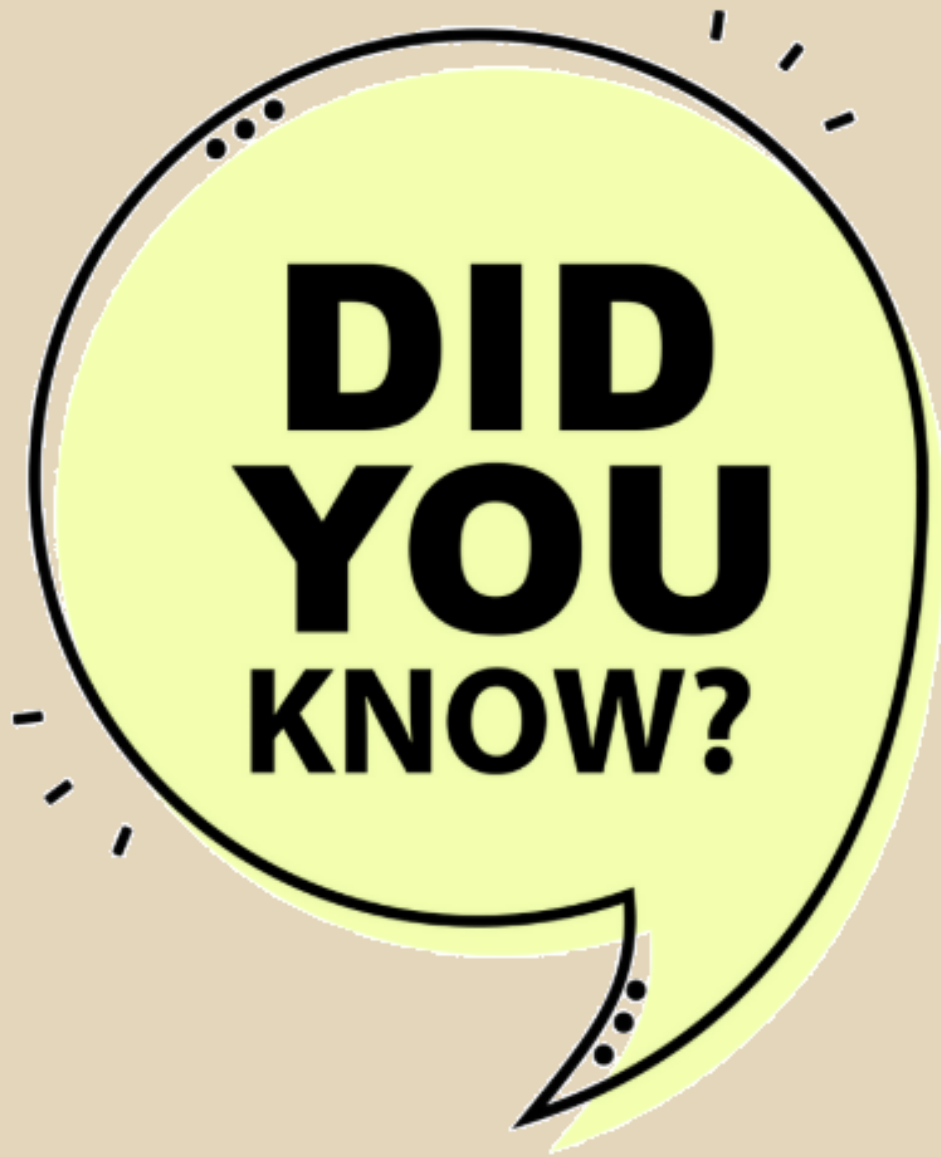
Question: How appealing is the idea of connection travel to you in 2026?



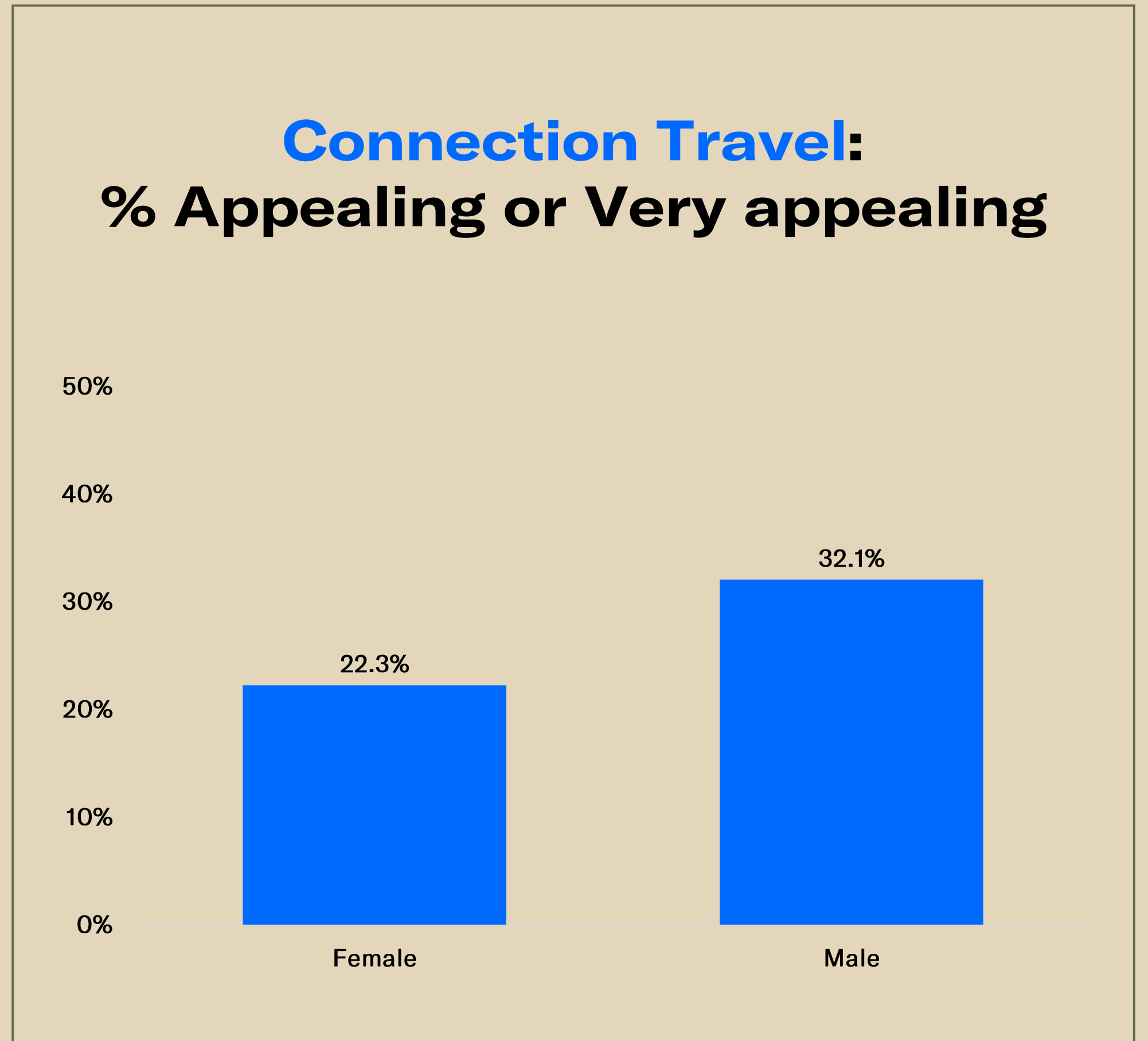


This is the domain of the youth, with Gen Z (48%) and Millennials (45%) leading the way.



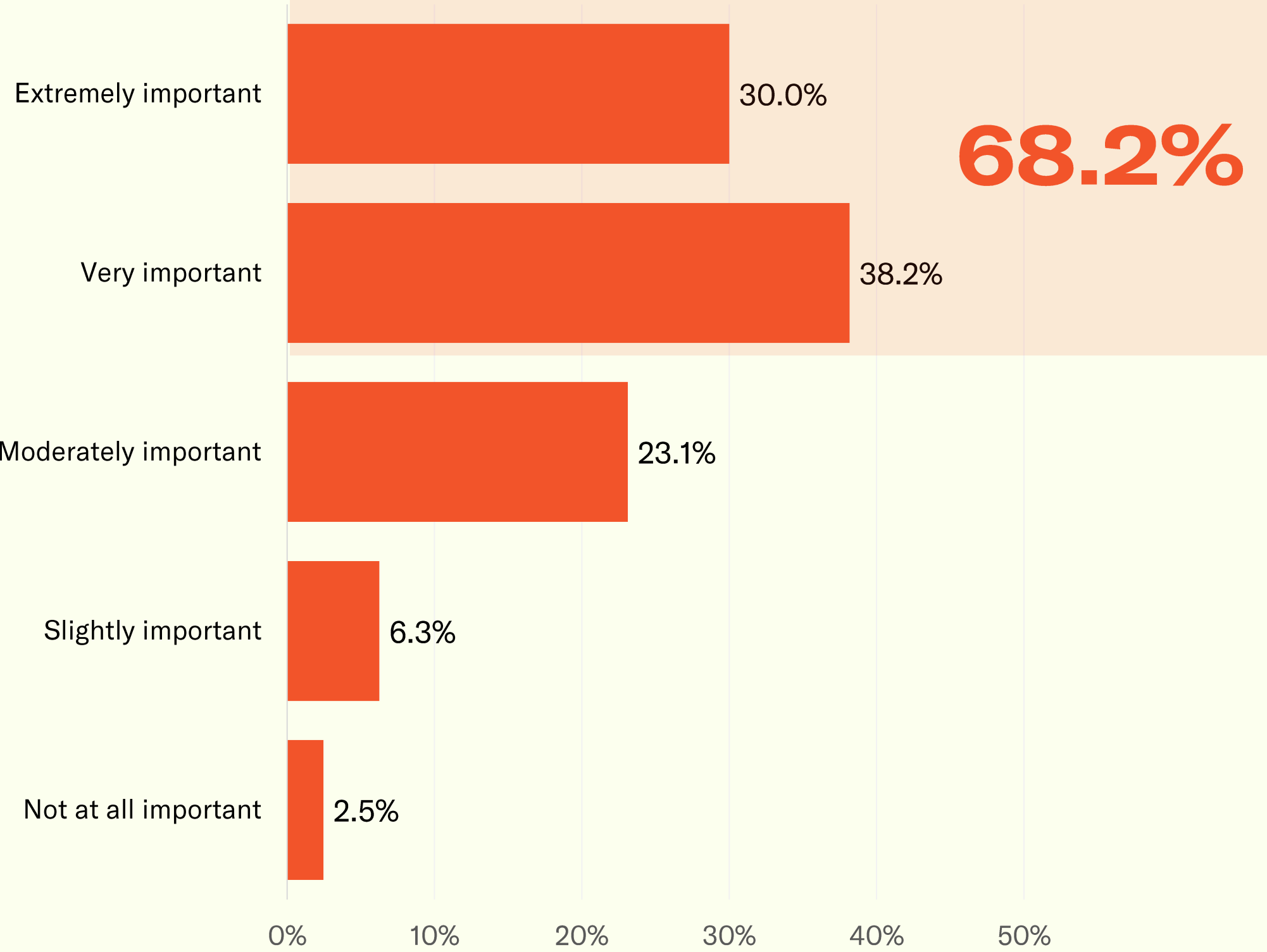


Men are also more into it than women.



Wellness is No Longer Niche: Travel is Widely Used by People to Support their Overall Well-Being

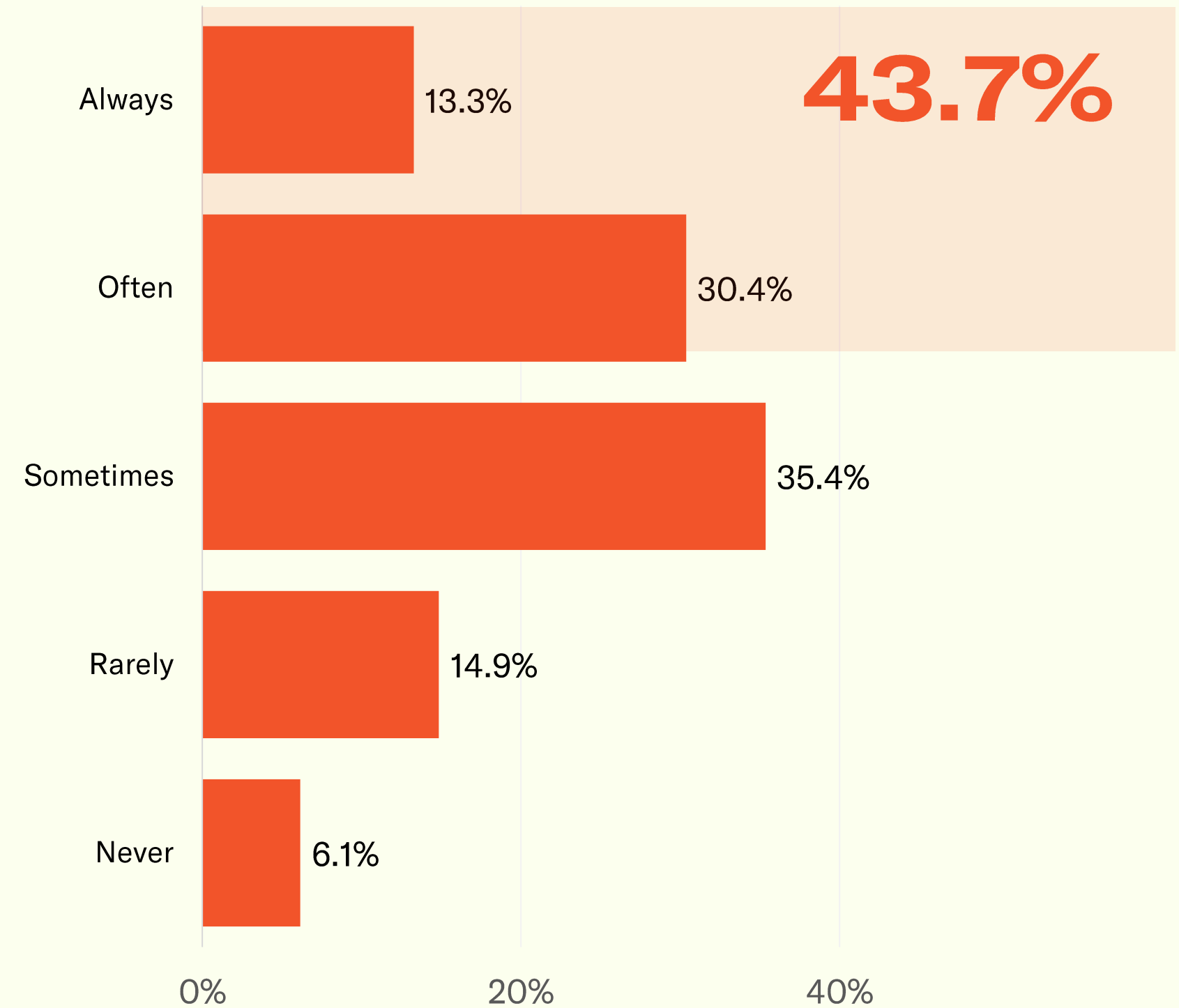
Question:
Think about what motivates you to travel. In general, how important is it to you that your leisure trips support your physical, mental, or spiritual well-being? (Select one)



More than 40% of Travelers Often or Always Plan their Leisure Trips Specifically to Support Their Well-Being

Question:

How often do you plan leisure trips specifically to support your physical, mental, or spiritual well-being?



Today's Agenda



The American Traveler Right Now

*The International Opportunity — Where
CALA Fits*

*The High-Value Traveler + Trends You're
Competing For*

Four Forces Reshaping the Game

What This Means for Your Property

The Four Forces Reshaping the Game

**Geopolitical Headwinds
The Generational Shift
AI-Powered Planning
Value-Seeking Patterns**



Geopolitical Headwinds

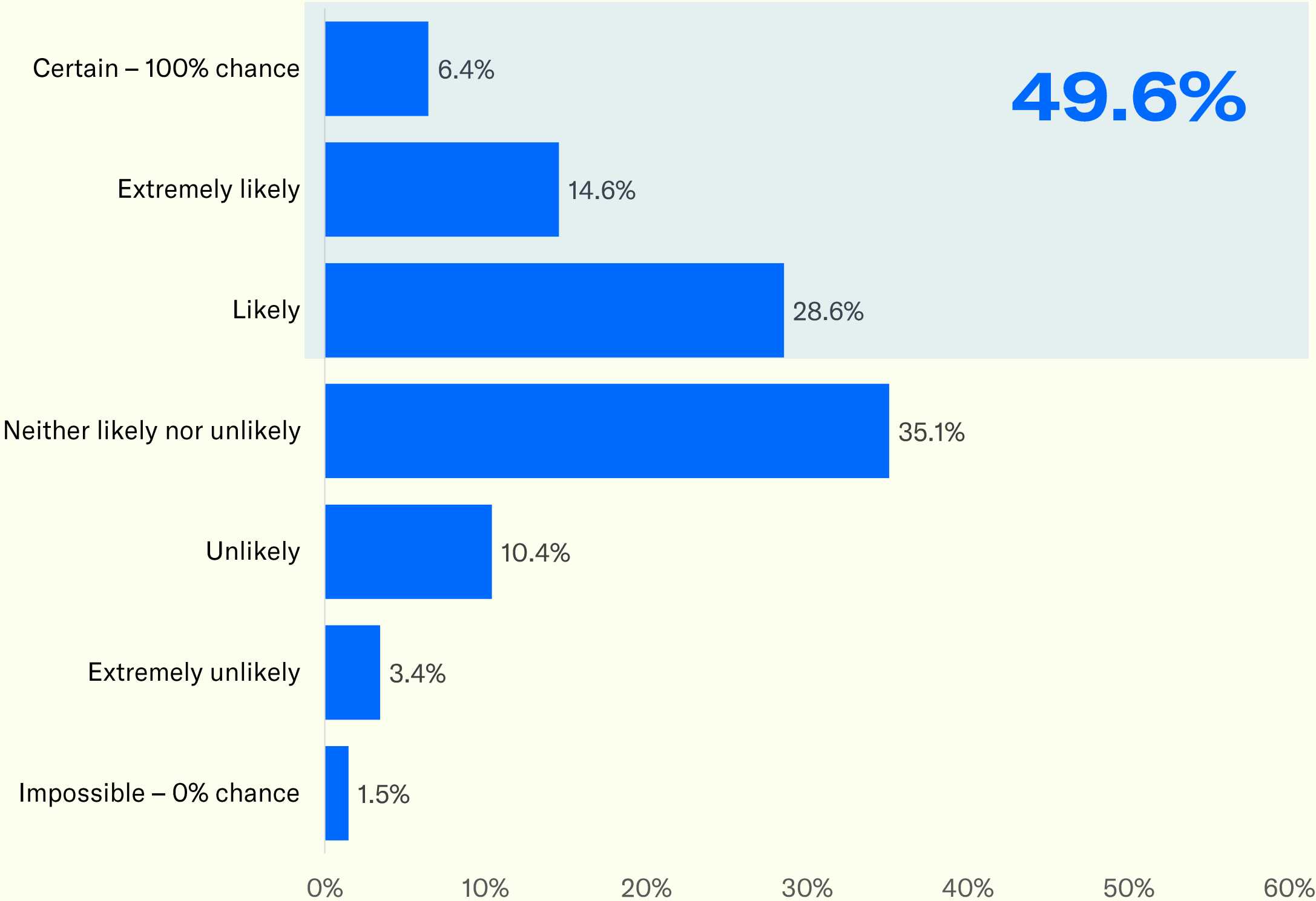
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Half of American travelers see politics as influencing the choice of destinations visited.

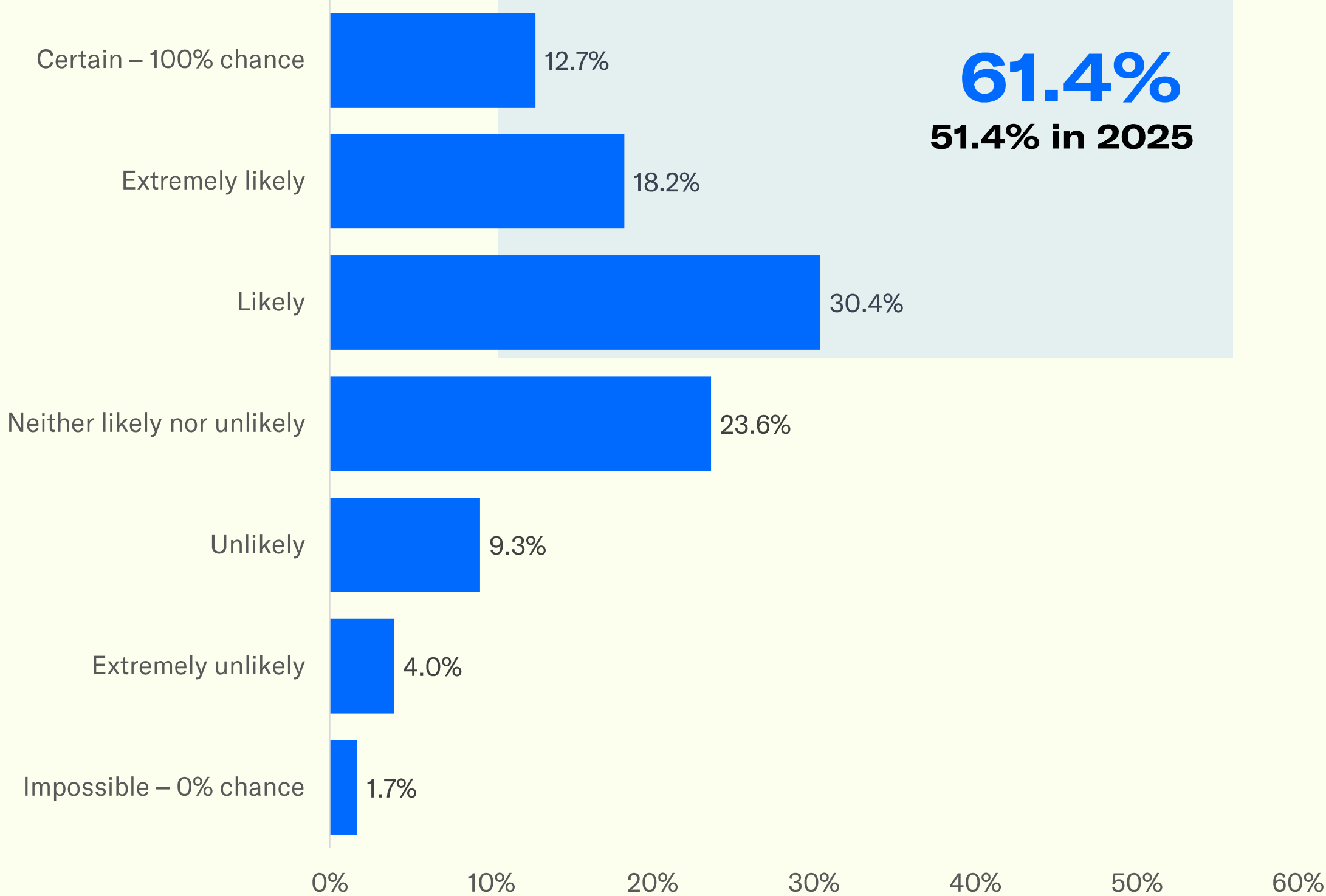
Statement:

More travelers will avoid (or select) destinations based on their personal politics.



Americans are increasingly unsure they will be welcomed when visiting foreign countries.

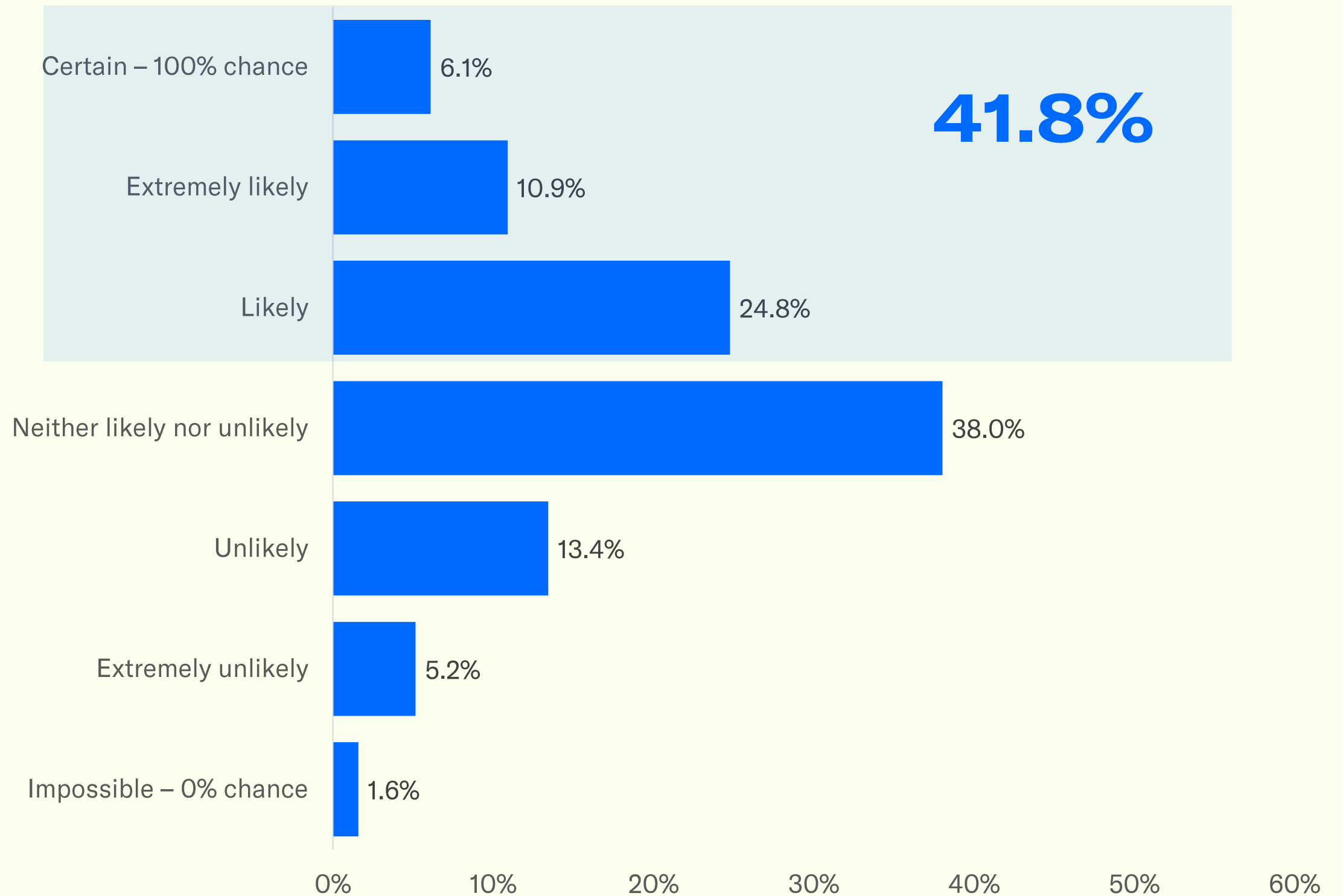
Statement:
Foreign destinations will become less welcoming to American travelers



By a two-to-one ratio, travelers expect more anti-tourism protests.

Statement:

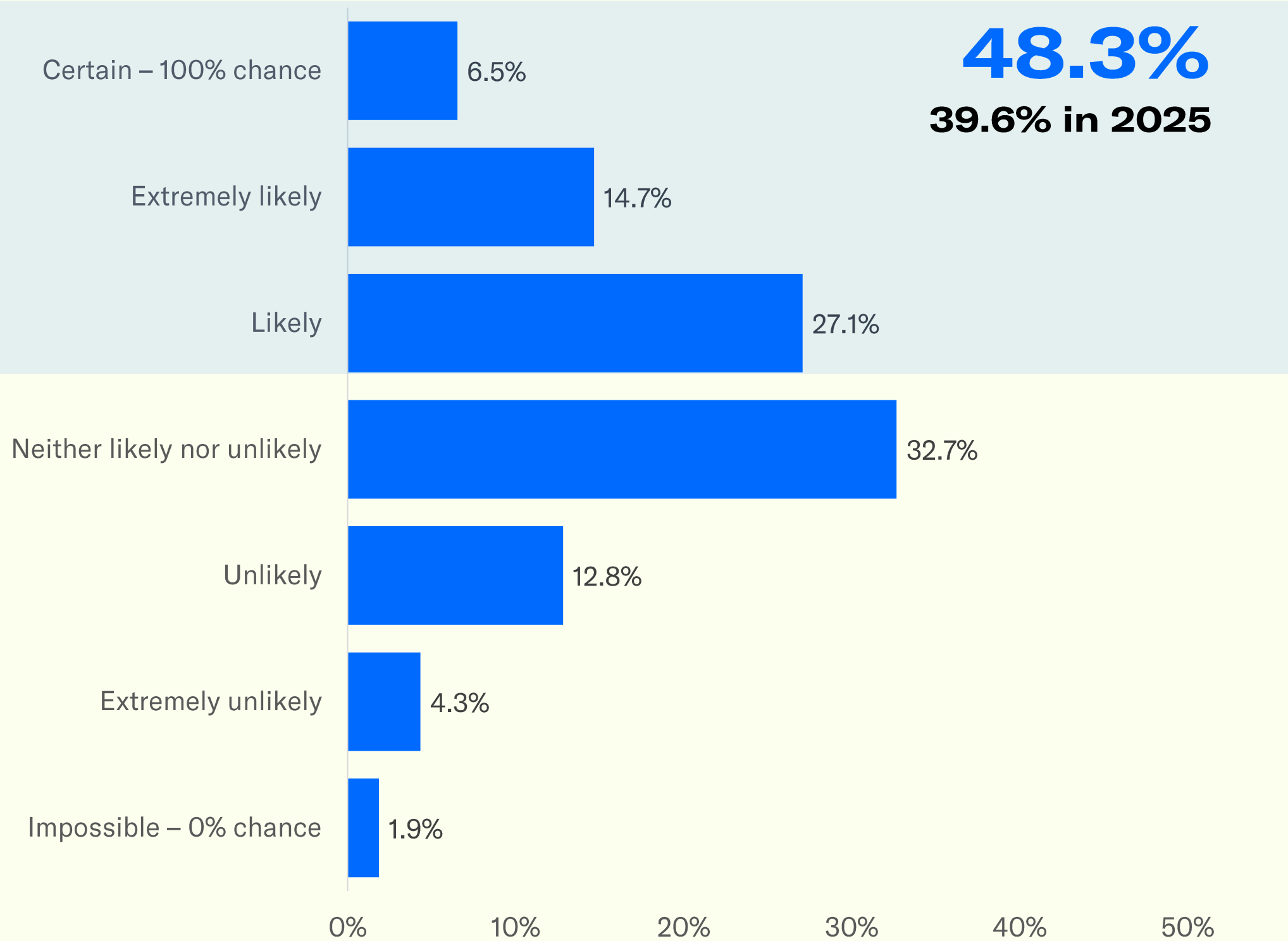
Anti-tourism protests will become more common.



Nearly 50% of travelers expect that destinations will start capping the number of tourists allowed to protect their communities.

Statement:

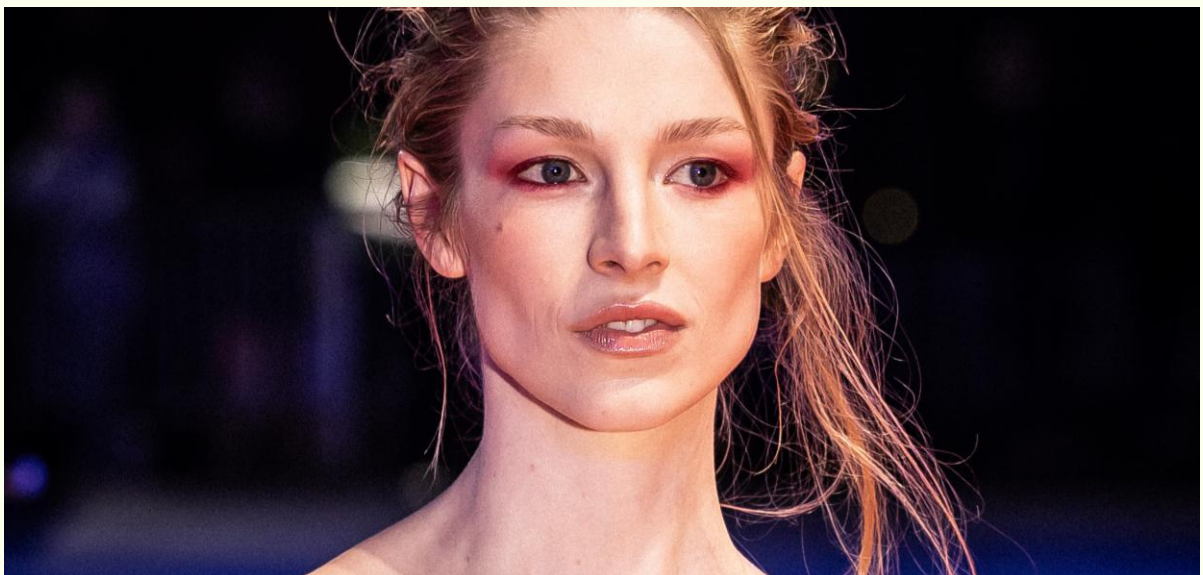
More destinations will start capping the number of tourists to protect their communities



The Generational Divide

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Gen Z is the most growth-oriented, digitally-native, experience-driven segment in travel.

Gen Z is the Most Growth-Oriented Travel Segment

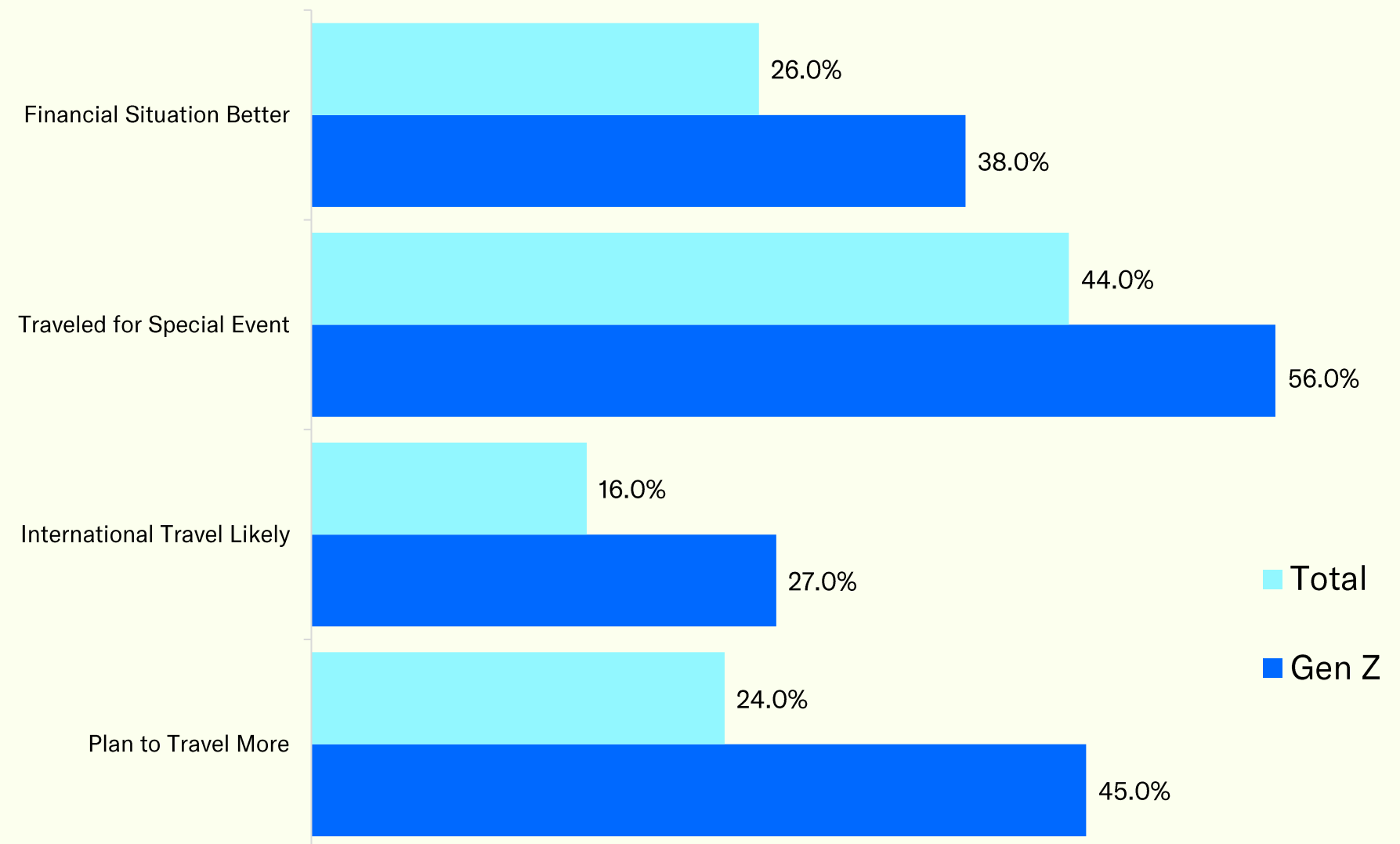
Nearly half of Gen Z plan to travel more in the next 12 months — nearly double the overall rate. They are also far more open to international travel, with fewer structural barriers holding them back.

3%

of Gen Z say international travel is "Very Unlikely" — 19 pts below the average.

Fewer structural barriers, stronger global appetite.

Gen Z Vs. Total – Key Travel Behaviors



Optimistic Outlook with a Budget Ceiling

Gen Z is strikingly bullish about their near-term finances — nearly 3× the overall rate expect to be "much better off" within a year. But current income constrains how far that optimism translates to spend.

38%

say financial situation is better vs. 1 year ago

+12 pts vs. Total

32%

expect to be "much better off" within 1 year

+20 pts vs. Total

39%

rate leisure travel as high spending priority

+11 pts vs. Total

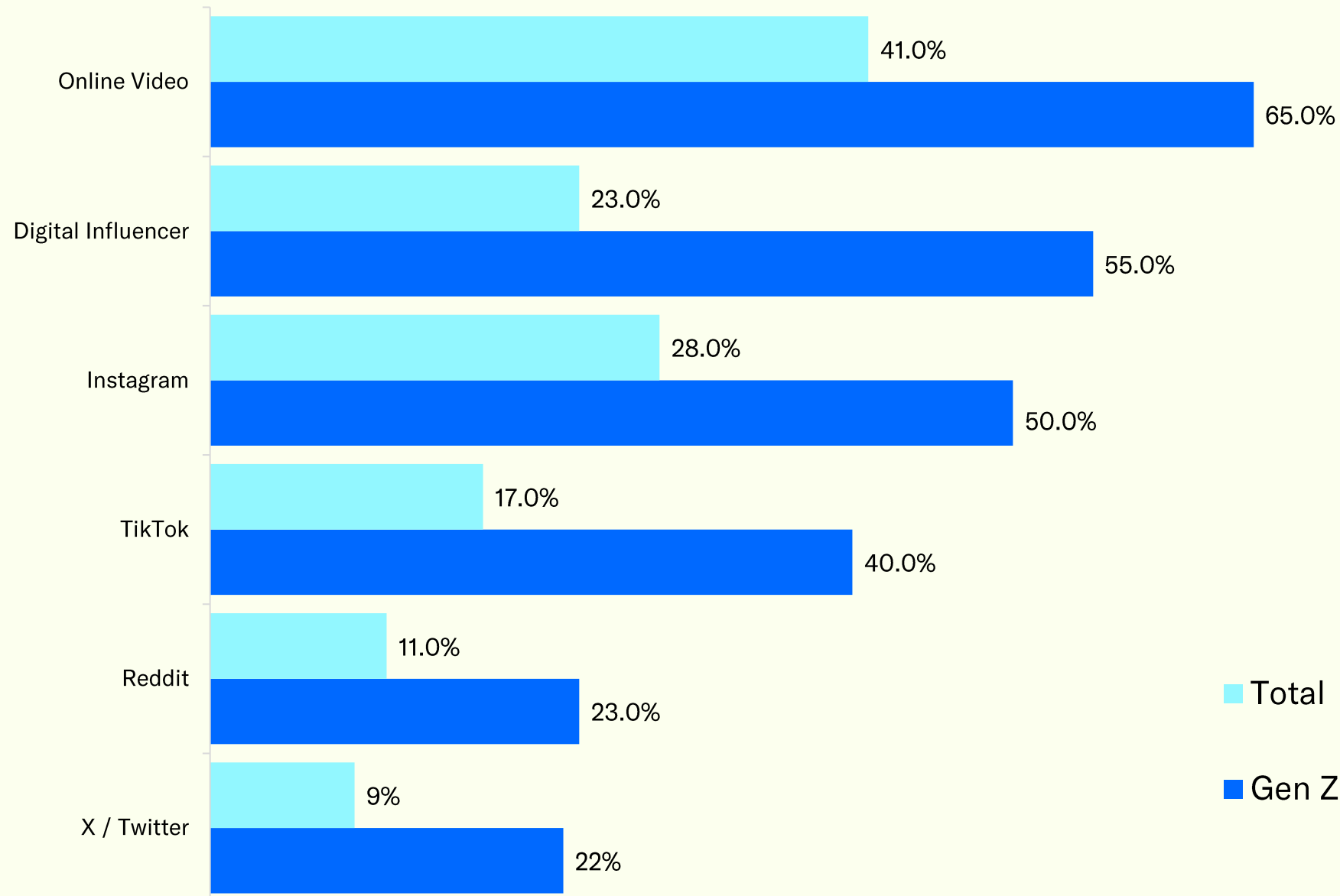
Budget ceiling: only 12% of Gen Z budget \$10,000+ for leisure travel (-12 pts vs. Total).

High aspiration, constrained capacity. Reach them early in the planning cycle with value-forward messaging.

Video and Influencers are the Front Door

Influencer use is the single largest behavioral gap in the entire dataset (+32 pts). Video platforms dominate discovery. TikTok is both a research and a conversion channel.

% Used for Travel Research



+32 pts

Influencer gap

+24 pts

Online video gap

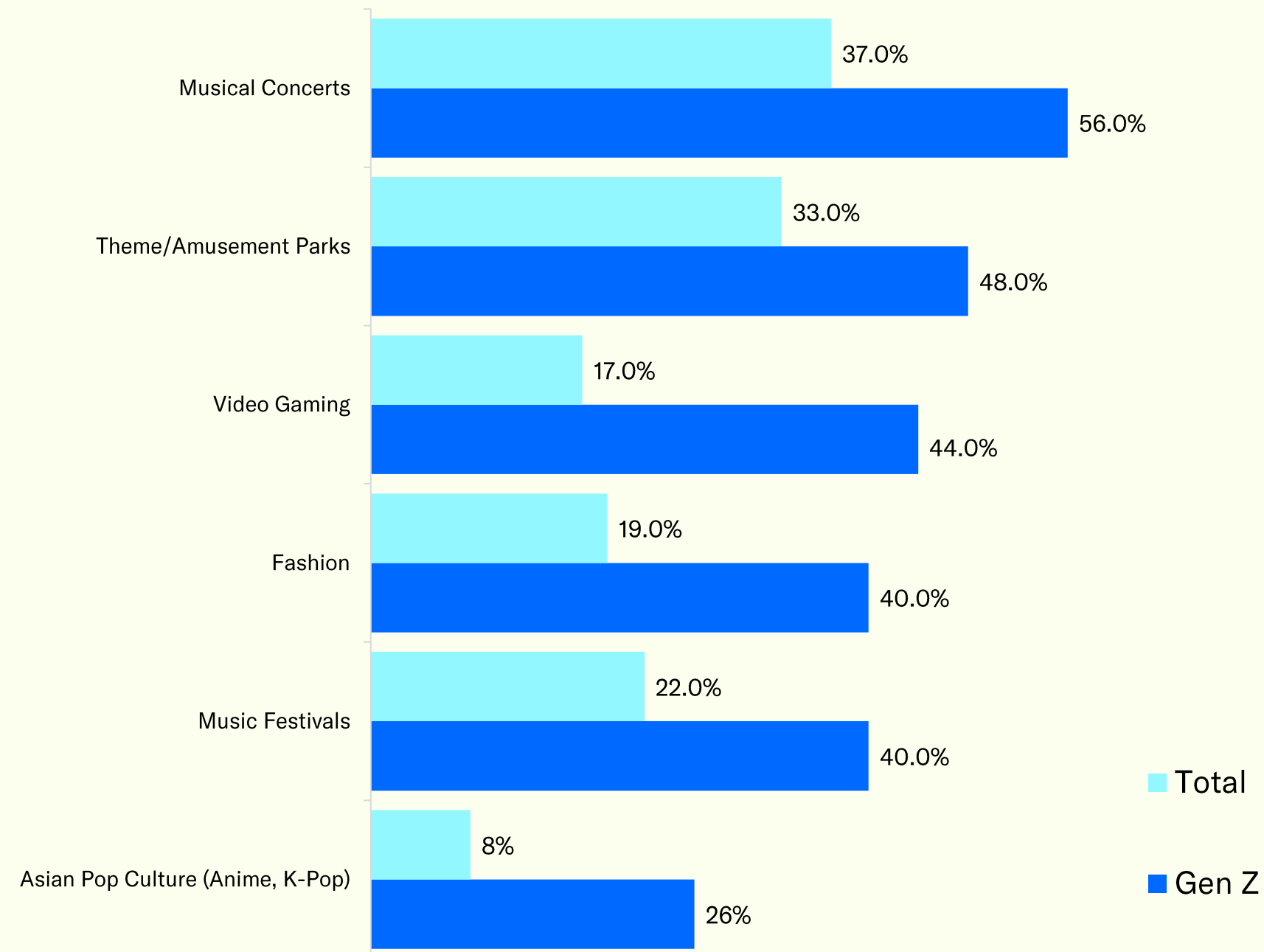
+23 pts

TikTok gap

Experience-Driven in Every Dimension

Gaming is the largest single interest gap (+27 pts). Live music, fashion, theme parks, and Asian pop culture all over-index sharply — each pointing to distinct travel programming opportunities.

% Highly Interested – Lifestyle Categories



+27 pts

Gaming

+21 pts

Fashion

+18 pts

Pop Culture

Social Roots. Career-Active. Work Barrier.

HOW THEY TRAVEL

61% **+16 pts**

took an overnight VFR trip (visit friends / relatives)

47% **+15 pts**

took at least 1–4 business or conference trips

34% **+12 pts**

cite work busyness as a travel barrier

14% **+10 pts**

cite sold-out availability as a barrier

TRAVEL CHALLENGES

49% **+22 pts**

Psychological challenges (anxiety, mental health)

27% **+18 pts**

Hearing-related challenges

34% **-17 pts**

Mobility / physical challenges

Independent *and* connected — they want both.

A generation often caricatured as insular actually wants travel that stretches them, links them to family, and gives them room to go it alone.

SOLO TRAVEL

43.4%

of Gen Z took a solo leisure trip in the past 12 months — the highest of any generation.

MULTI-GENERATIONAL

58.6%

want to take a trip with three or more generations of family — more than any older cohort.

GROWTH MINDSET

65.6%

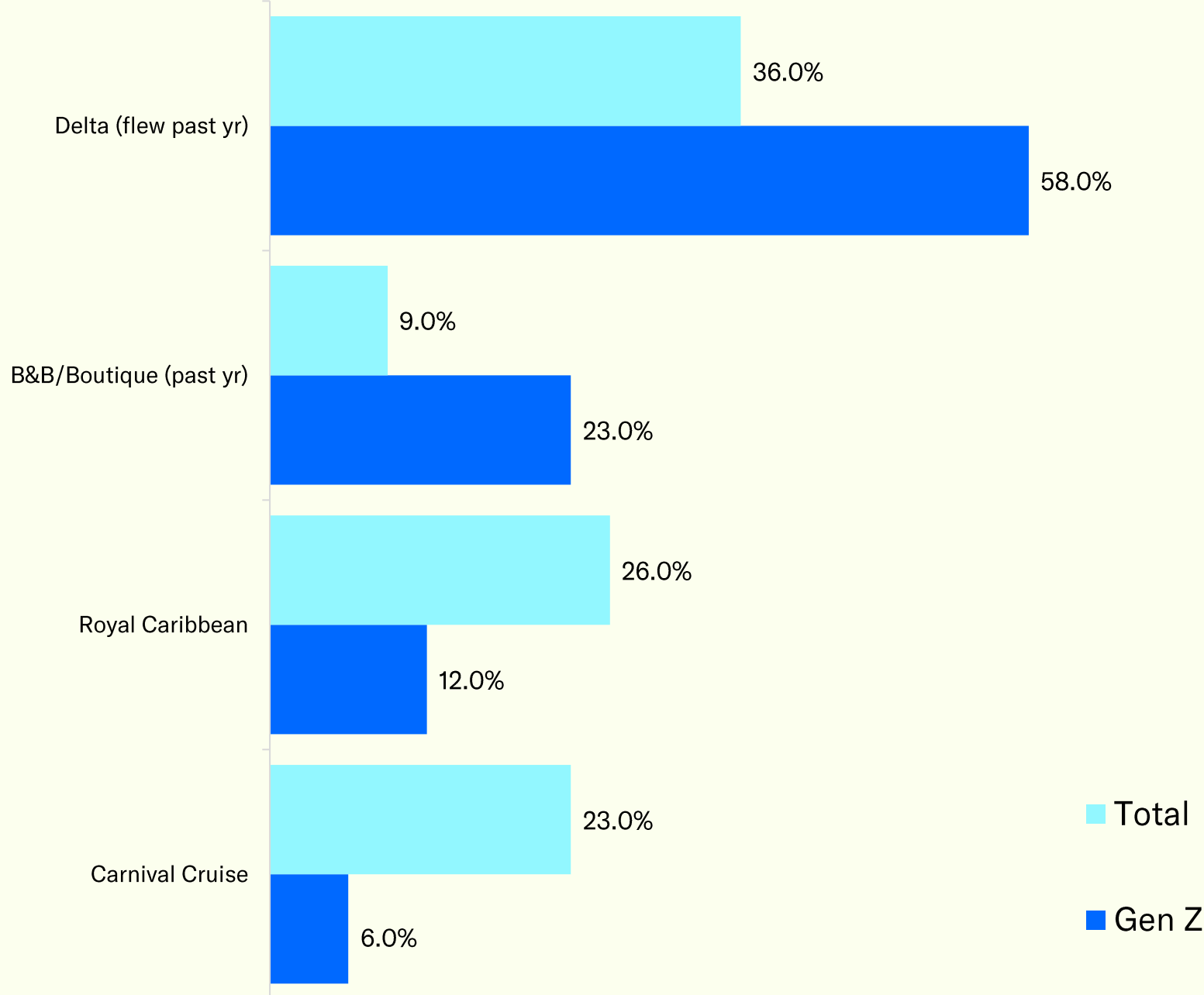
are likely, extremely likely, or certain to use travel to step outside their comfort zone.

Gen Z wants the whole range — solo discovery one weekend, three-generation reunion the next. Products and content should flex across both.

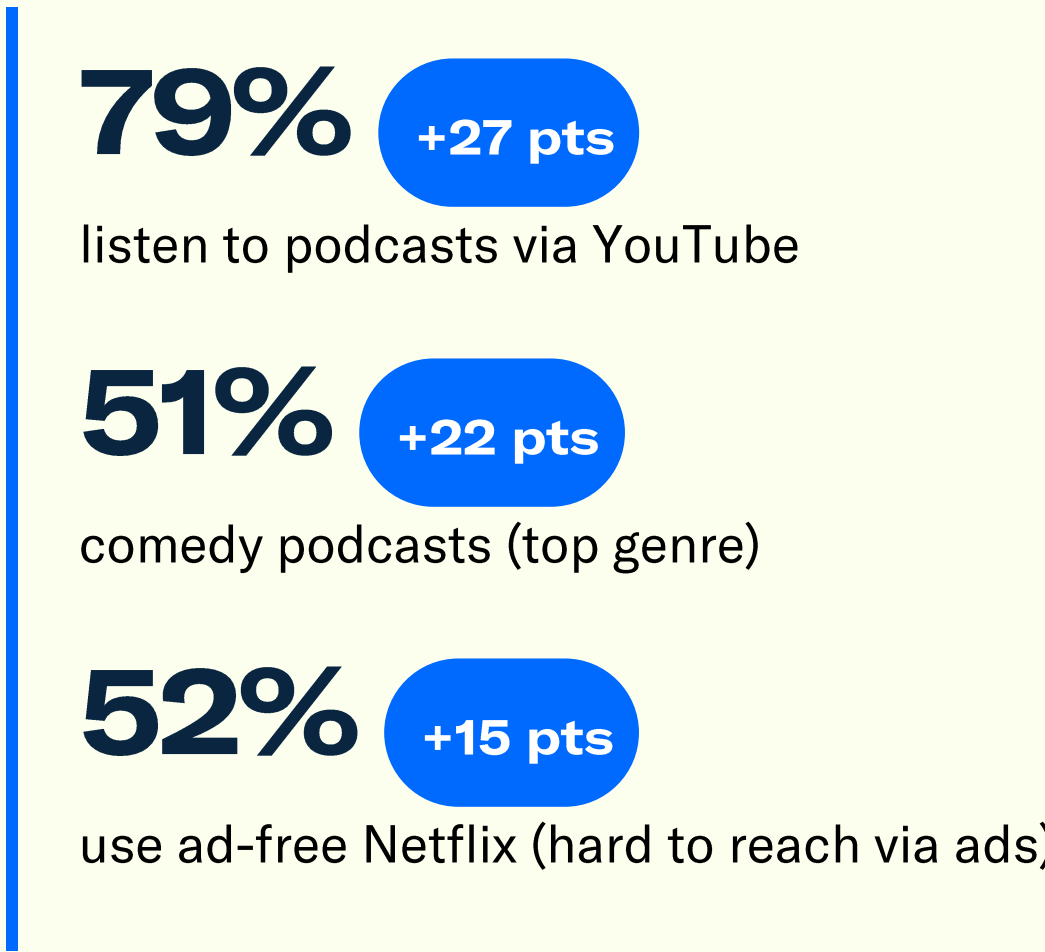
Delta Wins. Cruises Not Registering. YouTube Dominates.

Brand preferences and media habits reveal where Gen Z is and isn't reachable, and which travel products resonate.

Airlines, Lodging, & Cruises



Media Consumption



Six plays for winning the Gen Z traveler.

01

Lead with experience, not attraction

Sell what visitors will do and feel. Festivals, food scenes, nightlife, and adventures beat static landmarks in Gen Z's consideration set.

02

Make TikTok a primary channel

Not a side project. 48.7% of Gen Z plans travel on TikTok — creator partnerships and short-form video belong upstream of paid search.

03

Build programming around events

Gen Z will travel for the right event. Co-market with music festivals, food events, and cultural moments to earn share when they're already shopping.

04

Invest in a culinary identity

Food is the #1 passion driver. Destinations with distinctive food stories have a natural advantage; others should build one deliberately.

05

Talk to the solo traveler

43% of Gen Z travel alone. Create content, itineraries, and hotel products for independent visitors seeking growth and discovery.

06

Bridge the generations

Gen Z wants trips with their parents and grandparents. Position experiences that appeal across age brackets without diluting the cool factor.

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We Asked Travelers...

Future Partners

We Asked Travelers...

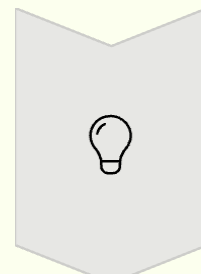
AI-Powered Planning

Future Partners

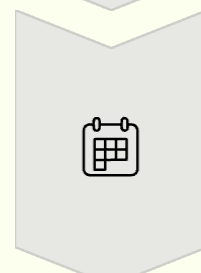




Where Travelers Feel Confident vs. Where Friction Shows Up



Inspiration
Confidence: Destination choice
"I know where I want to go"



Compare/Book
Hesitation: Accommodations + review trust
"Will it match the photos?"



Pre-trip Logistics
Frustration: Pricing/policies + transportation disruptions
"Fees, cancellations, price jumps"

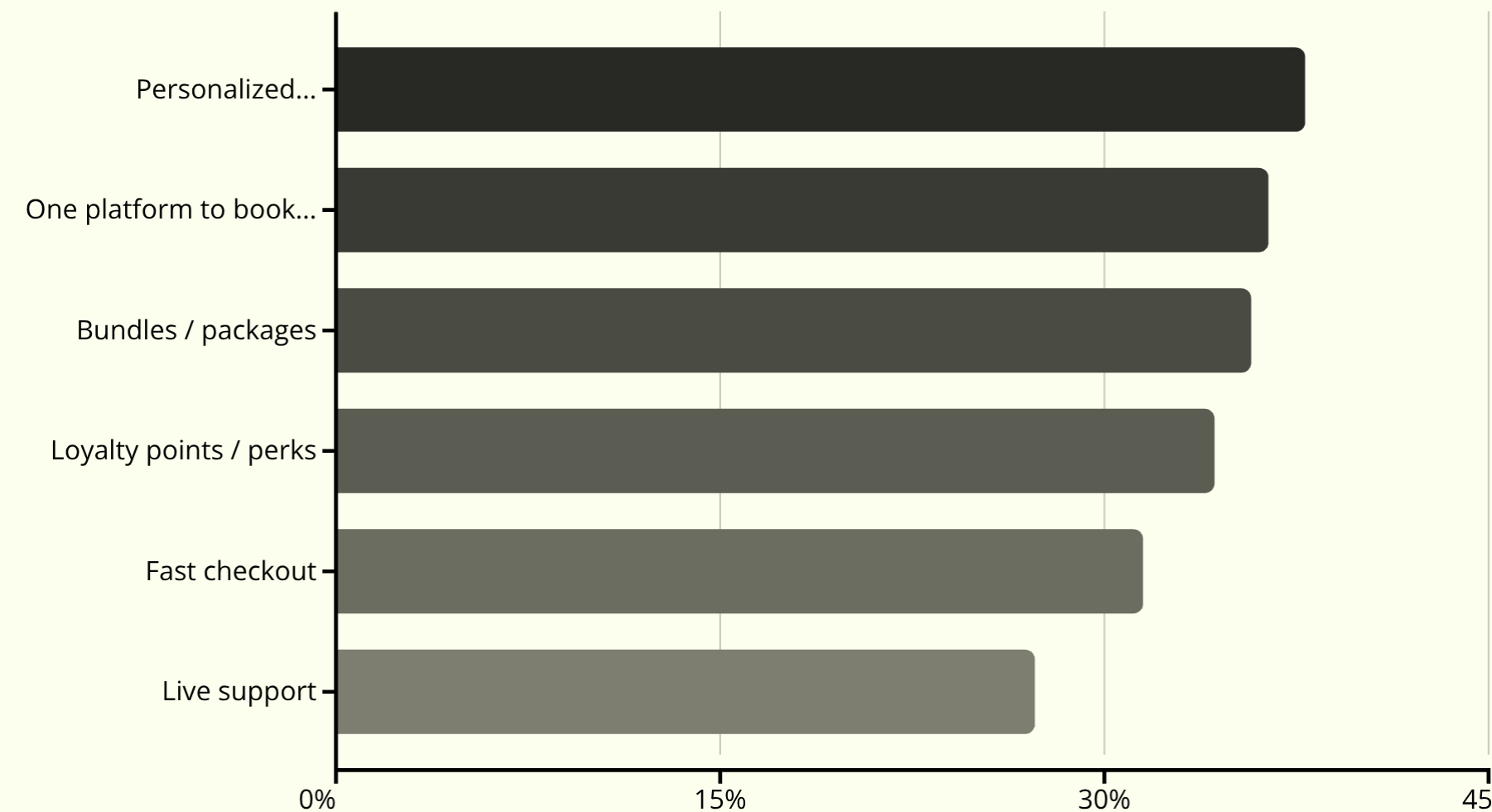
□ People feel good about the 'where'—they struggle with the 'how much,' 'who to trust,' and 'what happens if plans change.'

- Top Hesitation Triggers
- Reviews
 - Cleanliness
 - Location
 - "Fit"

- Top Frustration Triggers
- Price volatility
 - Cancellations
 - Lack of support
 - Delays

When Forced to Cut 3 Booking Features, Travelers Drop 'Nice-to-Have' Convenience Features First

What Gets Dropped First (Least Important)



Most Disposable

- Bundles / packages 16.8% dropped first
- One platform to book everything 15.4%
- Personalized recommendations 9.8%

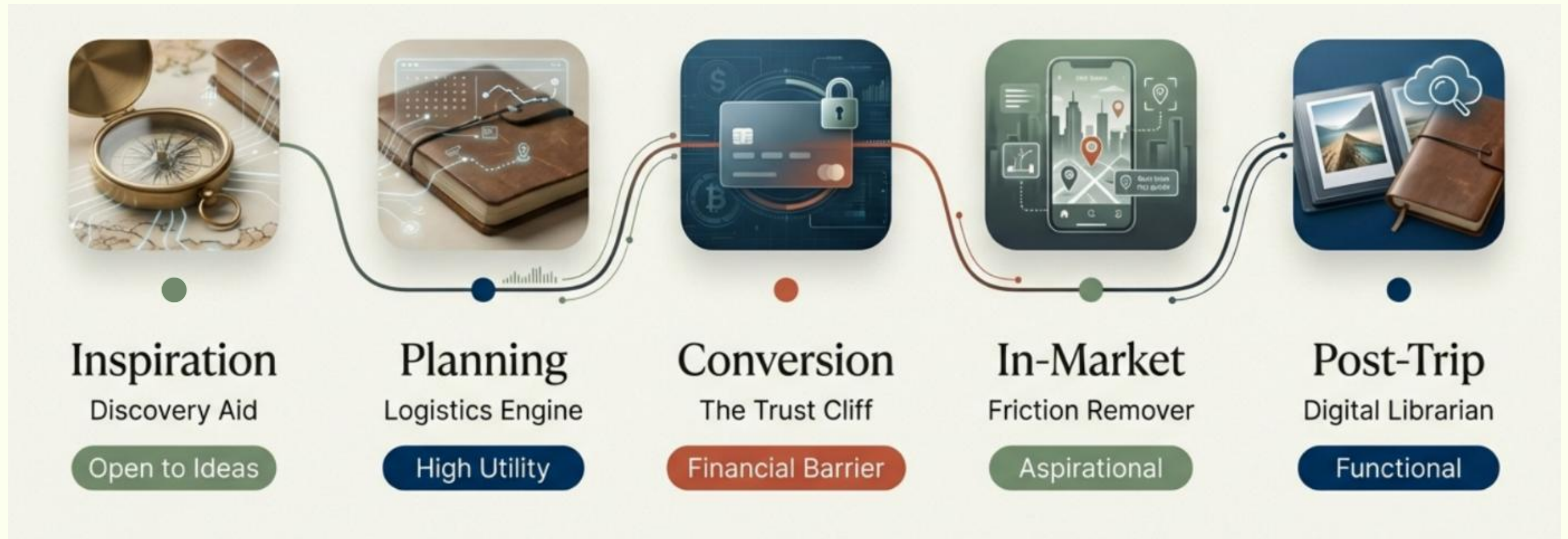
Most Durable

- Transparent fees – 22.4%
- Trusted reviews – 23.1%
- Lowest price – 25.2%
- Flexible cancellation – 26.6%

📌 The Insight

In a tradeoff scenario, 'extras' get cut first: personalization, bundling, loyalty programs, and all-in-one platforms are the most expendable. Foundational trust signals prove harder to drop — transparent fees and trusted reviews show the lowest drop rates, revealing what truly matters when travelers face difficult choices.

Traveler Mindsets Shift Dramatically Throughout the Planning Process



Inspiration: AI assisted Discovery More than AI Decision-Making

Travelers are increasingly comfortable letting AI suggest where to go, but they rarely book solely on those suggestions.

Open to Suggestions

53.6%

Discovery Assistance:

Found Places they wouldn't have otherwise

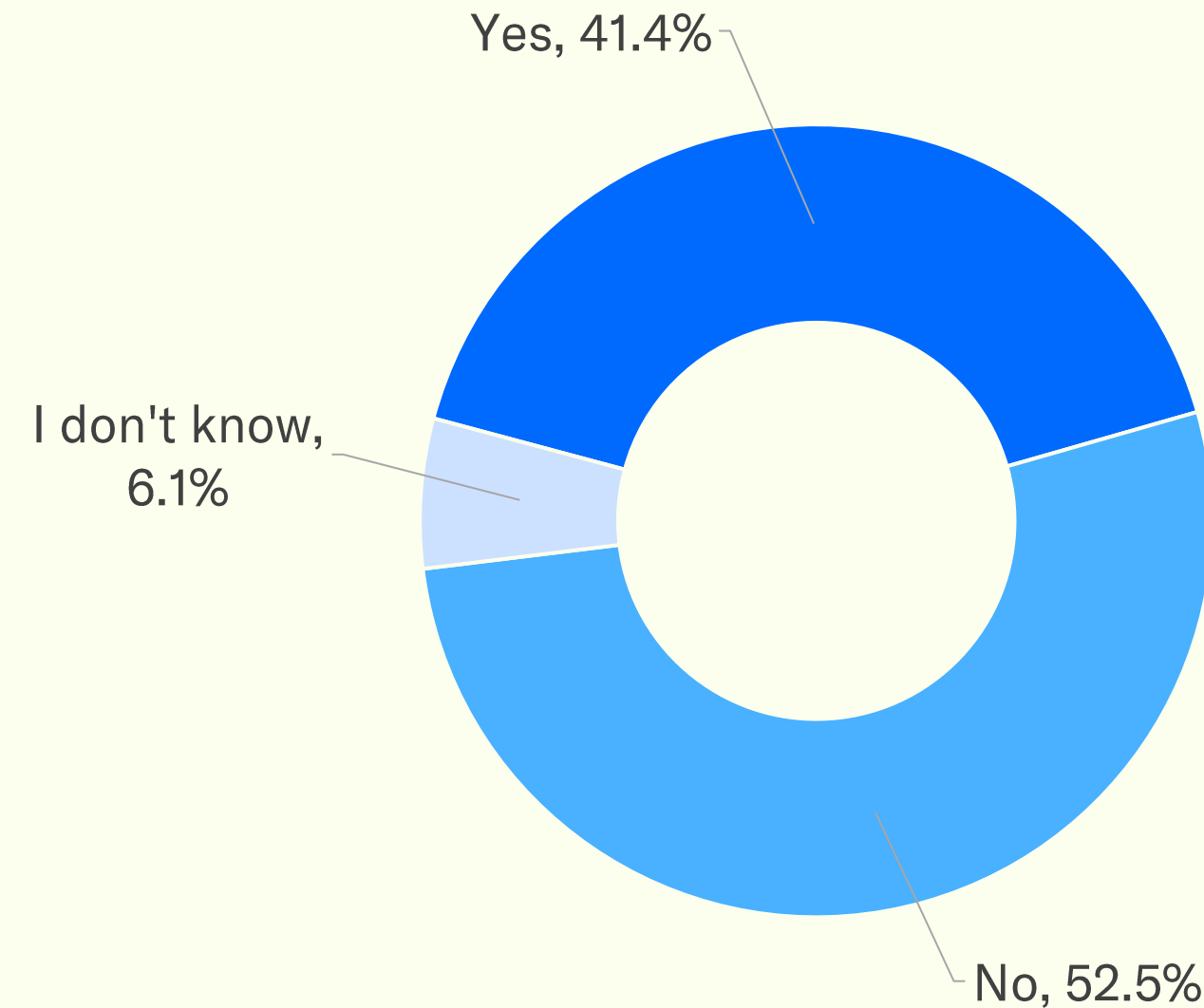
34.3%

Primary Decision Maker

17.3%

A Significant Share of Travelers Turn to AI **When Planning** Trips

Question: To the best of your knowledge, in the PAST TWELVE (12) MONTHS have you used any of the above Artificial Intelligence (AI) tools or chatbots specifically to help you plan (or prepare for) any of your trips?



Conversion: The Trust Cliff



40.4%

Believe AI provides better deals and recommendations



34.0%

Say AI would be valuable if it guaranteed the best price

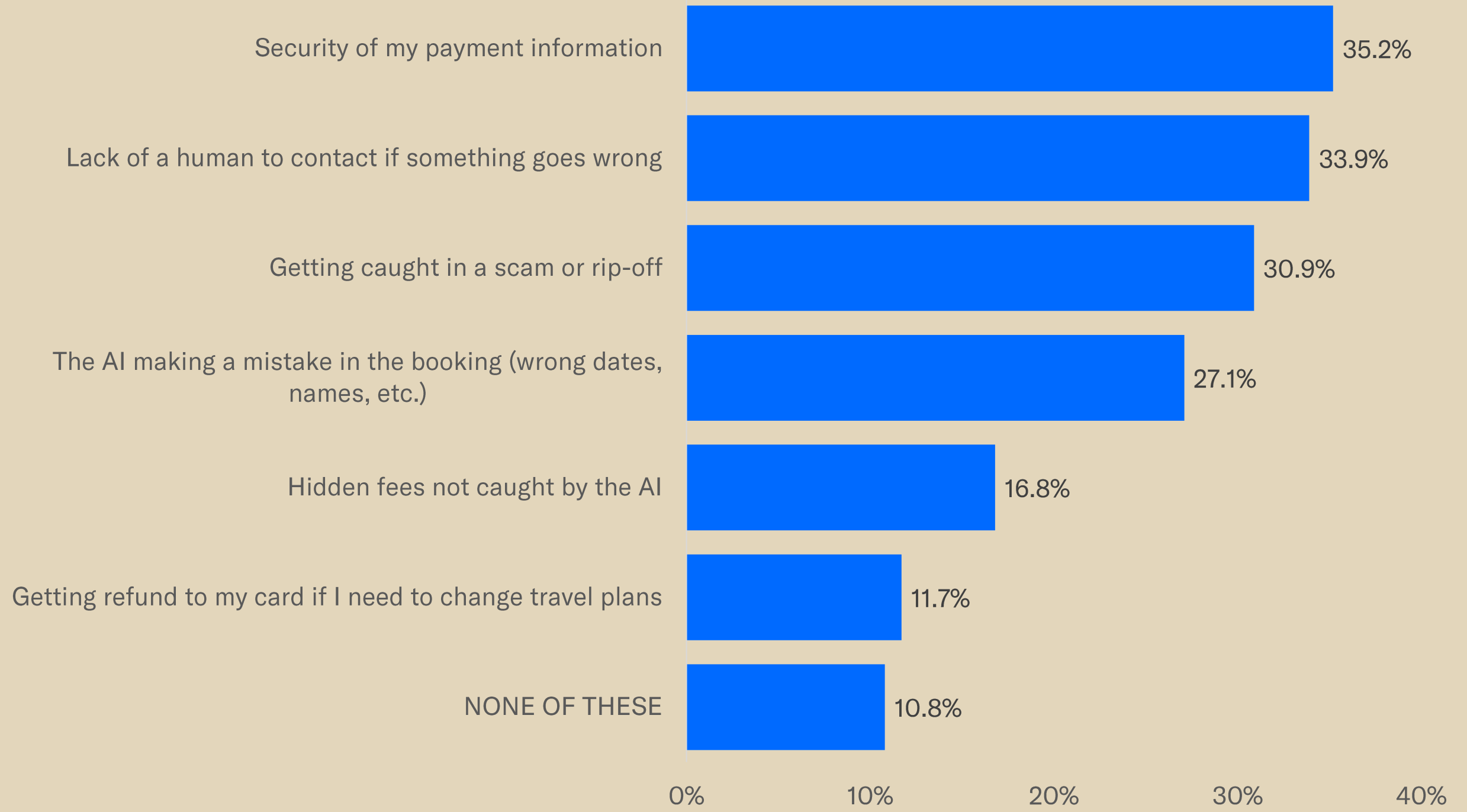


7.9%

Very comfortable providing credit card info to AI

Lowest-Price Guarantees are Not Enough to Buy Traveler Confidence

Question: What would be your biggest concern about having an Artificial Intelligence (AI) tool book and pay for your travel?



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While Traveling: Interest in Friction Removal is High



Question: Now, think about when you are actually on your trip. Please rate how you would feel about using Artificial Intelligence tools AI for the following tasks. How interested would you be in using Artificial Intelligence tools to do each of the following?

Local Expertise Remains the Gold Standard for the in-destination Experience

AI is accepted in visitor centers and hotels as a supplement, not a replacement.

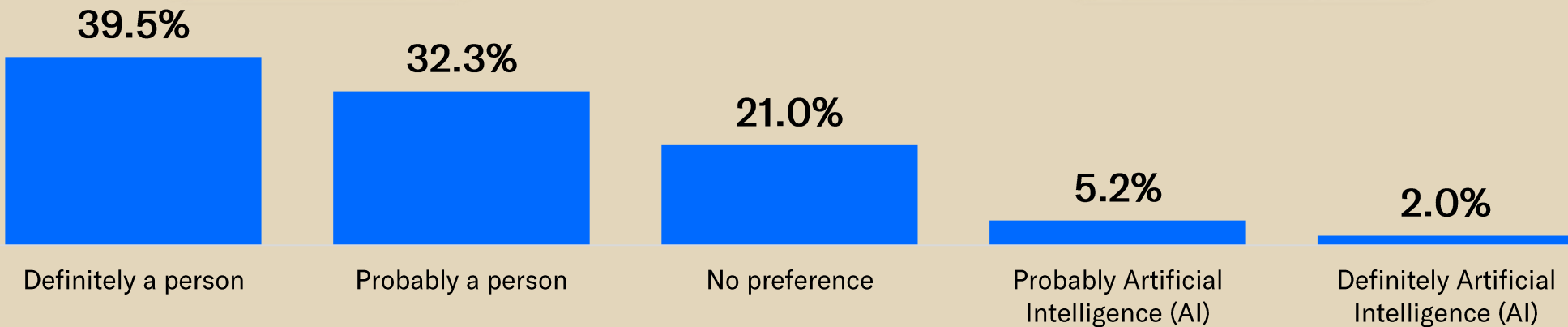
59.7%
Preference For Local Expert Advice

68.7%
Important that Real People are Available



40.2%
Comfortable with AI Hotel Front Desk

46.4%
Appreciate AI-powered amenities in Hotel rooms



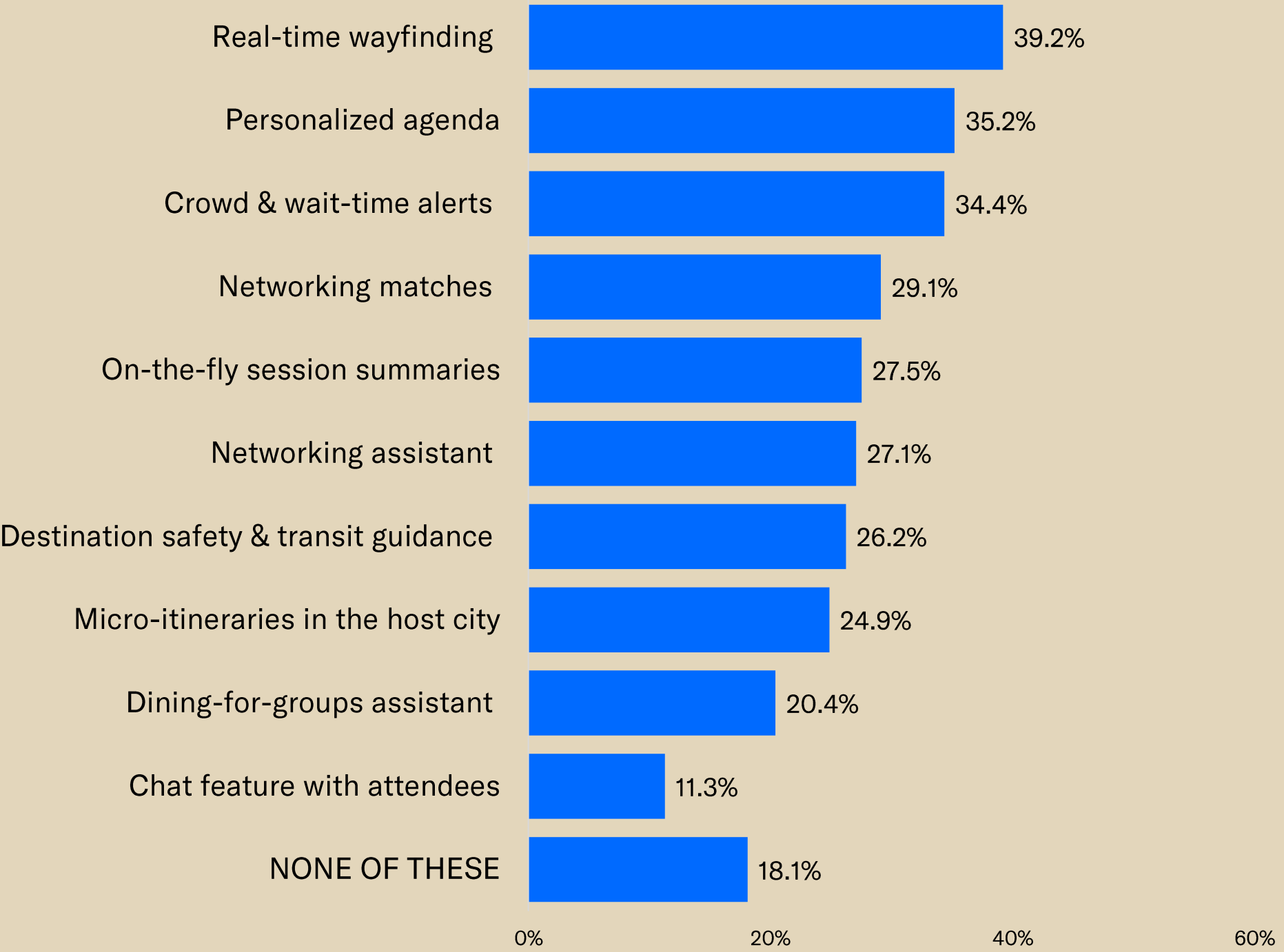
Question: Which would you feel more confident about getting local travel advice and opinions from? (Select one)

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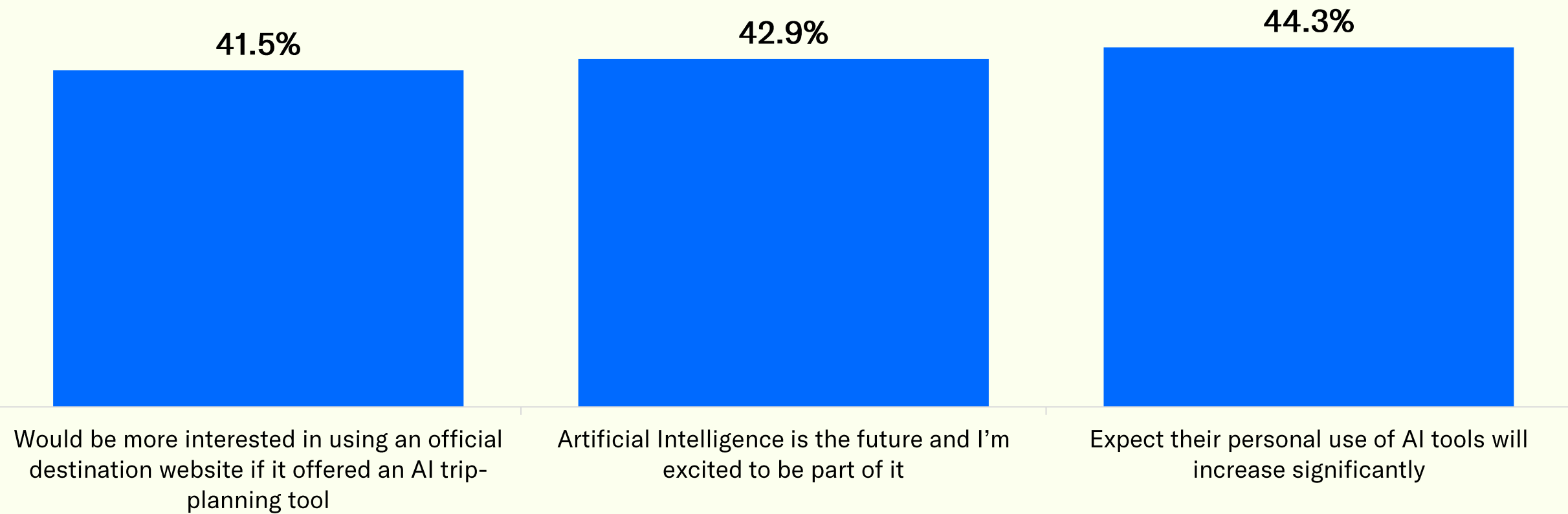
Business Travelers: Most Valued AI Conference Features

Question: You mentioned earlier that you travel for business, conferences, conventions or group meetings.

Which AI-powered features would generally be valuable to you at a convention or conference?



Looking Ahead: AI's Future In Travel



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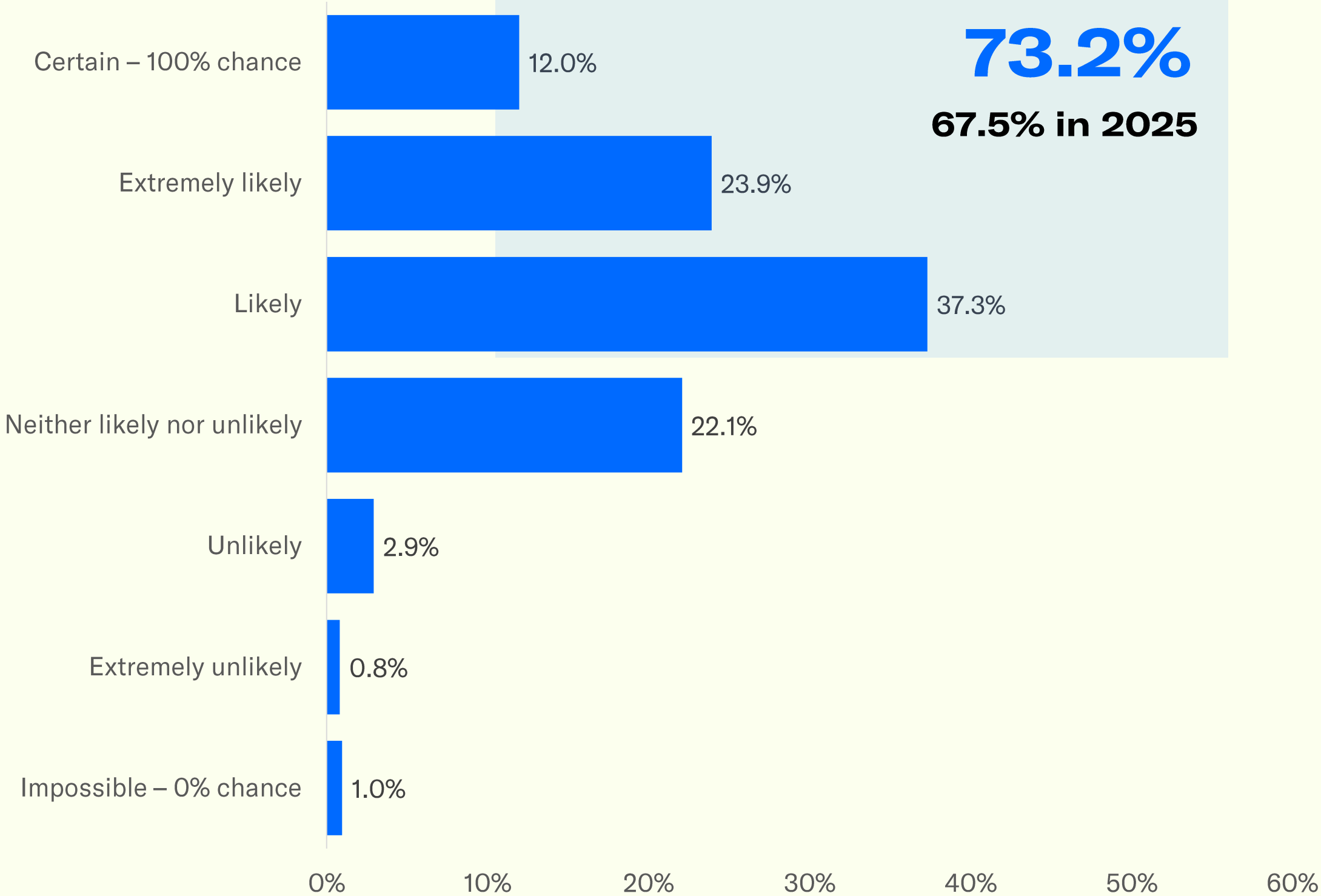
Value-Seeking Patterns

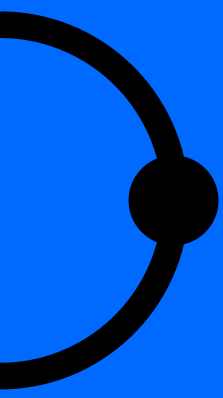
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The high cost of travel weighs heavily on travelers' minds, with 3-in-4 seeing budget-friendly travel as growing

Statement:
Budget-friendly destinations will become more popular in 2026.





The rise of dupes

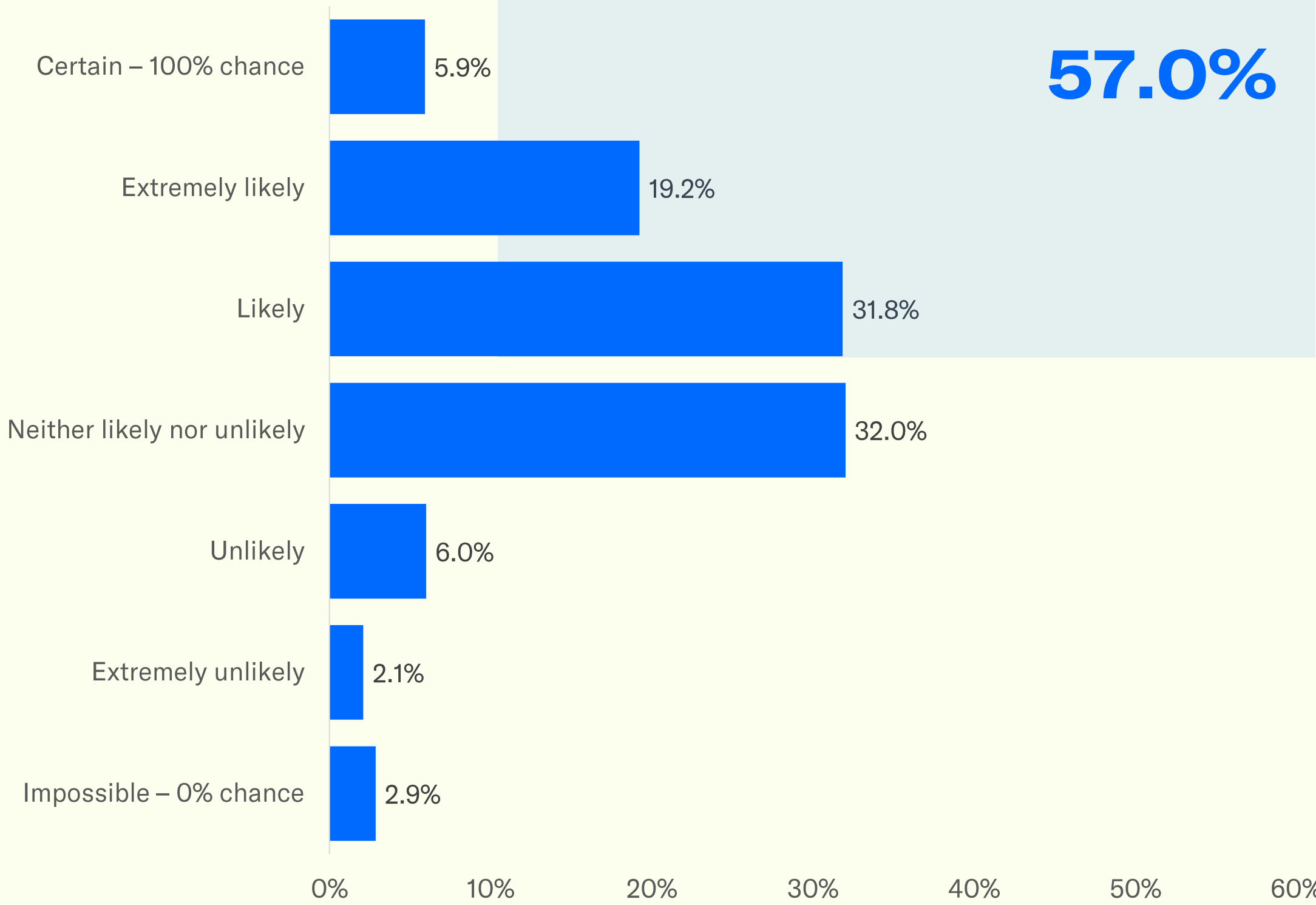
“Dupes” is a slang word for destinations that are affordable alternatives to historically more expensive places.

Nearly 6-in-10 travelers see dupes as growing in popularity.

Statement:

“Dupes” is a slang word for destinations that are affordable alternatives to historically more expensive places.

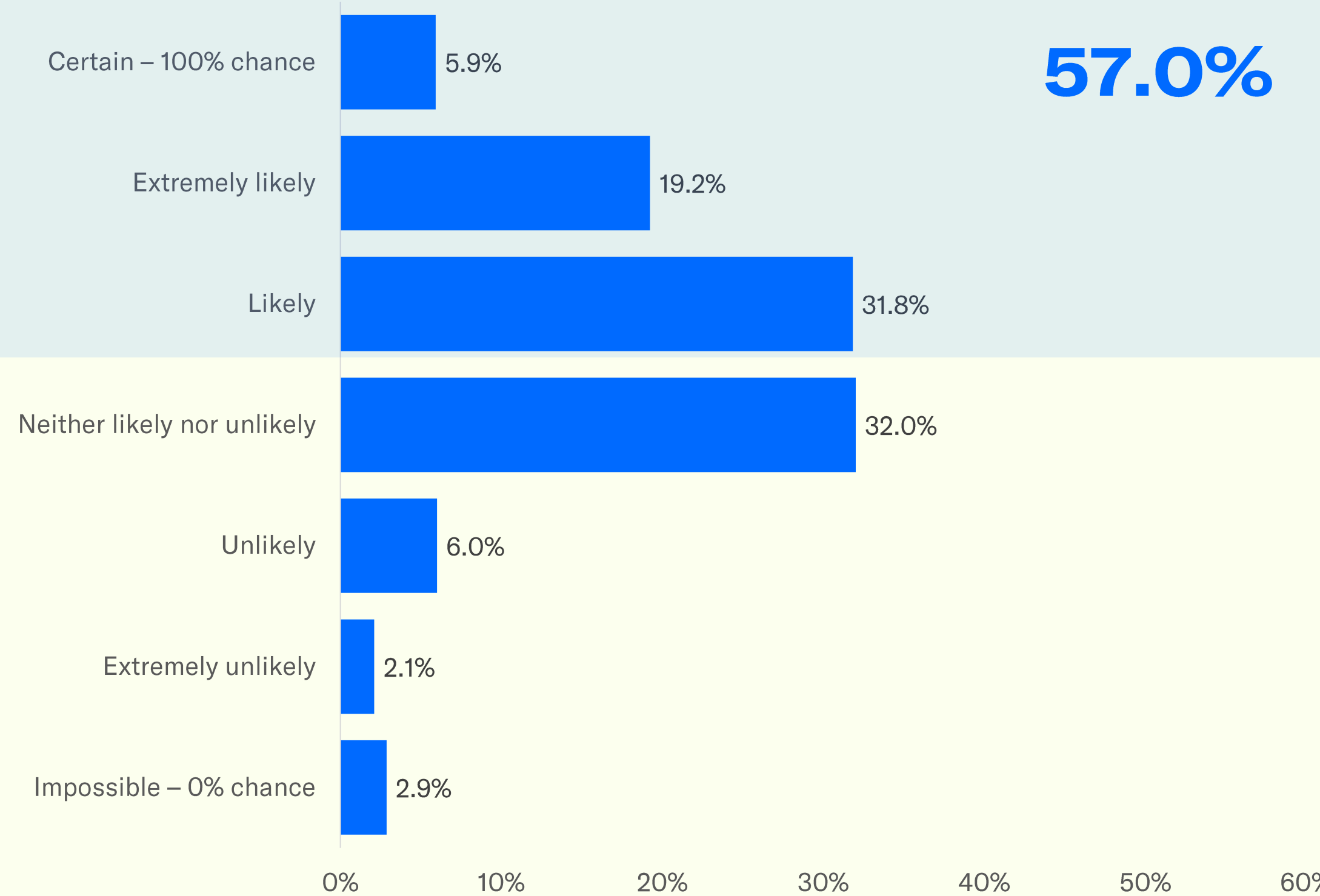
In 2026, visiting dupes will grow in popularity.



Although down from last year, nearly 6-in-10 travelers see the market responding to high costs and crowding by traveling to off-the-beaten-path destinations.

Statement:

Undiscovered or off-the-beaten-path travel destinations will grow in popularity due to the crowding and high costs of popular destinations.



Today's Agenda



The American Traveler Right Now

*The International Opportunity — Where
CALA Fits*

*The High-Value Traveler + Trends You're
Competing For*

Four Forces Reshaping the Game

What This Means for Your Property



Now, I'd like to ask you about your travel spend priorities.



What's something you're willing to spend more on now? And what are you cutting back on?

Make It Count: Experiences Over Stuff

Spending More On

Travelers are prioritizing experiences and activities that create lasting memories—guided tours, cooking classes, outdoor adventures, cultural immersions, and unique attractions that tell a story.

"Making memories"

"Unique experiences"

"Immersive cultural experiences"

"Experiences over material possessions"

Cutting Back On

Souvenirs, impulse shopping for clothes and gadgets, and wasteful extras are taking a back seat. The shift is clear: memories matter more than merchandise.



Comfort + Convenience: Better Stays, Smoother Travel

Spending More On

Accommodations: Nicer, well-located hotels, unique stays, and private villas that enhance the experience.

Flight convenience: Direct flights, upgrades, and anything that avoids layovers and travel friction.

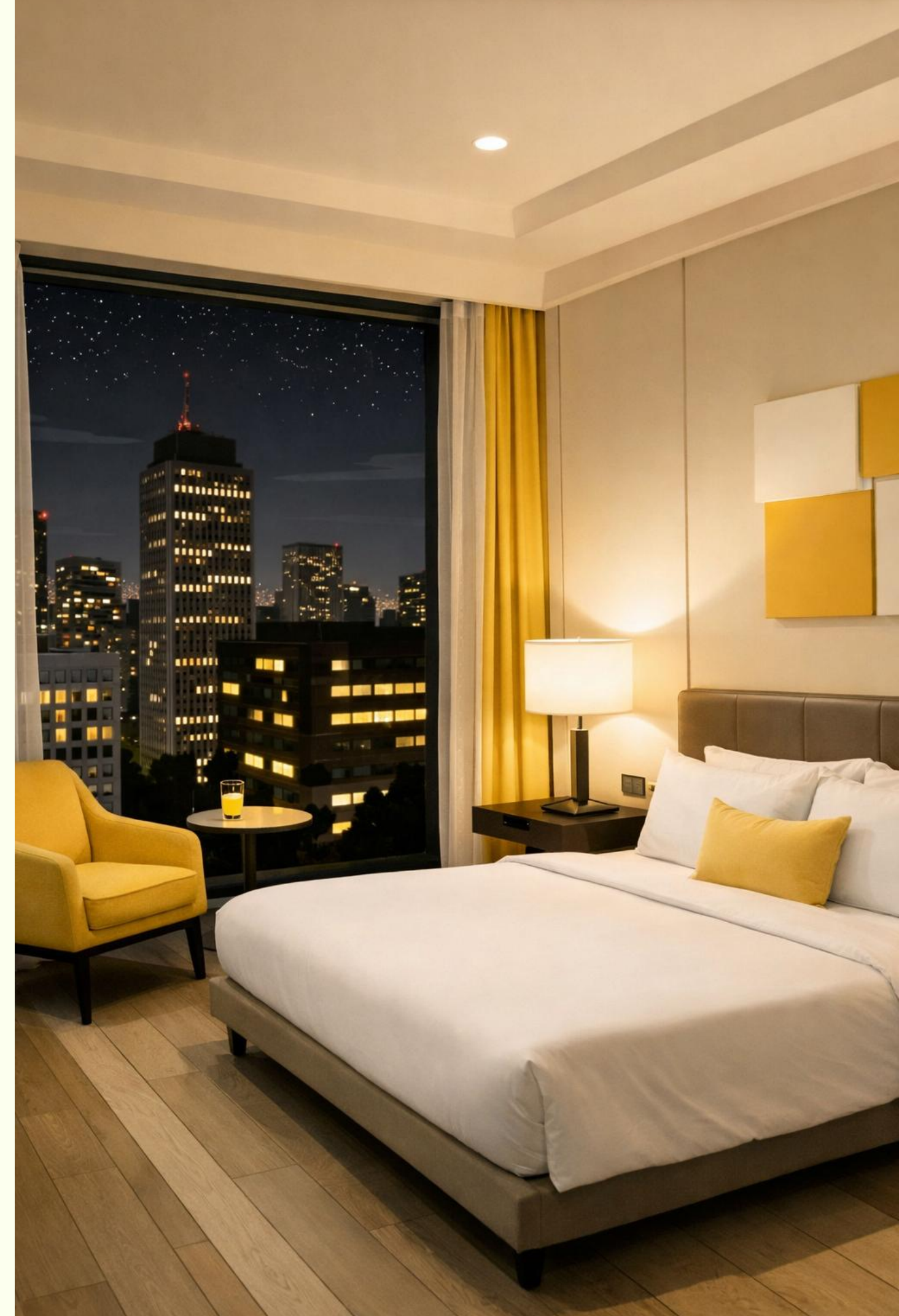
"Nice hotel in the right location"

Cutting Back On

Luxury car rentals, expensive transfers, and unnecessary upgrades. Some travelers are taking fewer but longer trips, focusing on quality over quantity.

"Direct flights only"

"Comfortable and safe accommodation"



Wellness + Values: Self-Care Meets Purpose



Wellness & Self-Care

Spa treatments, yoga retreats, mental health support, and personal care investments are rising.



Healthier Eating

Organic, nutritious food choices replace indulgent dining and fast food habits.



Values-Based Choices

Eco-friendly options and supporting local businesses align spending with personal values.

"Pamper myself"

"Wellness retreats"

"Organic food"

"Eco-friendly"

"Support local"

The Reallocation



Competitive Landscape

Marriott · Hyatt · Hilton

Hyatt Guest Carry the **Highest Income & Spend**

Average household income, high-earner share, and leisure spend differentiate the three brands. Hyatt sits at the top of every income and spend cut.



Travel Enthusiasm & Intent

Excitement scores and international intent are significantly elevated vs. the general American traveler — with Hyatt showing the largest gap.

Travel Excitement (Top 2 Box)



International Travel Intent (% planning intl. leisure trip)

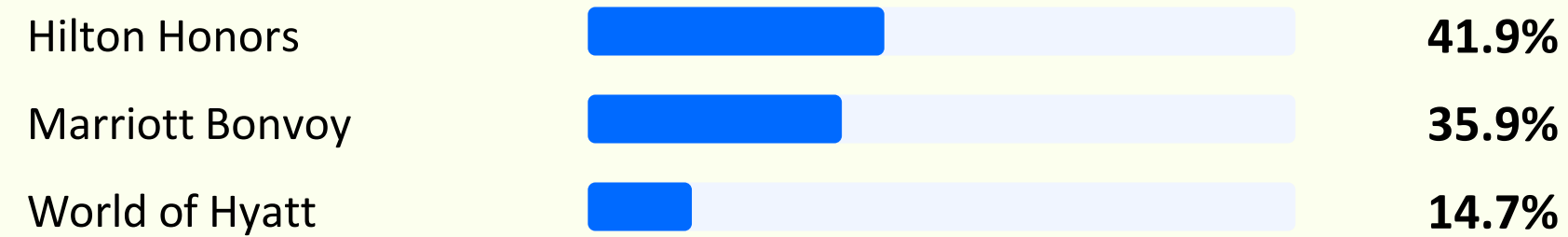


All three brands significantly outpace the average American traveler — **Marriot guests show 20.7 pts higher international intent.**

Loyalty Programs

Program adoption, credit card engagement, and the broader importance of rewards in booking decisions across the three brands.

Hotel Rewards Program Enrollment



Among all hotel loyalty program members surveyed.

Credit Card Rewards Usage (among brand guests)



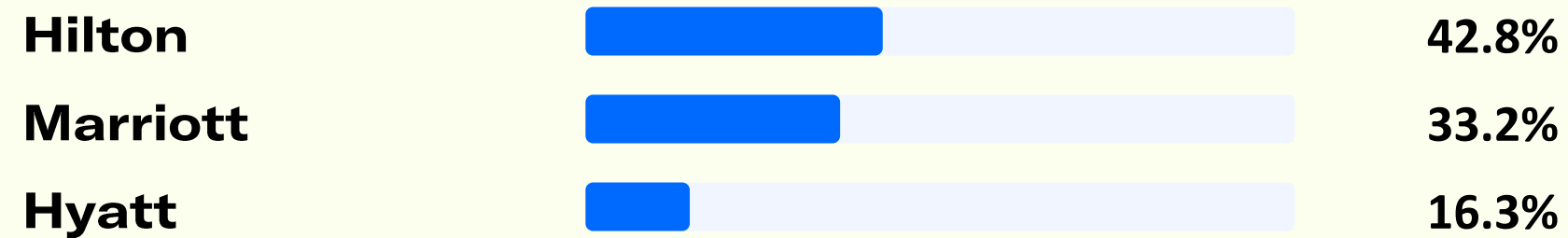
60.5%

of hotel brand guests say rewards are **important or extremely important** when choosing where to book.

Gen Z – Hotel & Rewards

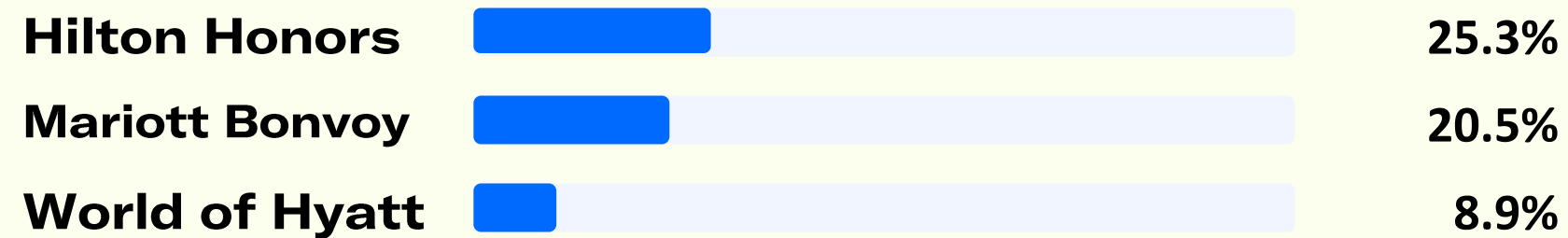
Gen Z show a mild preference for Hilton, followed by Marriott & Hyatt for both hotel brands and hotel rewards.

Hotel Brands Used (Past 12 Months)



Among all hotel loyalty program members surveyed.

Hotel Rewards Programs



While Gen Z is less likely to use hotel brands in general, their preferences mimic that of the overall traveler.

Booking Behavior

Platform usage across Marriott, Hyatt, and Hilton guests in the past 12 months. Direct relationship still anchors roughly a third of each brand's base.

OTA / PLATFORM (% USED PAST 12 MONTHS)	MARRIOTT	HYATT	HILTON
Expedia	35.5%	33.2%	36.1%
Airbnb	31.8%	34.5%	30.2%
Booking.com	28.4%	29.7%	27.9%
Hotels.com	22.6%	20.1%	24.3%








MARRIOTT
29.1%
Direct booking (no OTAs used)

HYATT
30.9%
Direct booking (no OTAs used)

HILTON
28.7%
Direct booking (no OTAs used)

Caribbean & LatAm Opportunity

Mexico, The Bahamas, and Jamaica lead demand.

DESTINATION	MARRIOTT SHARE	MARRIOTT	HYATT	HILTON
Mexico		11.9%	11.0%	12.2%
Bahamas		4.2%	3.3%	3.8%
Jamaica		2.8%	3.2%	2.5%
Dominican Republic		2.1%	1.8%	2.3%
Puerto Rico		2.0%	1.9%	2.1%
Costa Rica		1.7%	2.0%	1.5%
Aruba		1.4%	1.1%	1.6%

% of brand guests identifying each destination as a desired international leisure destination.

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Monthly Webinar
Series for the
Latest on American
Travel Sentiment
& Behaviors**



Livestream Calendar



Thank You

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