



MMGY GLOBAL

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# THE NEAR-TERM VIEW

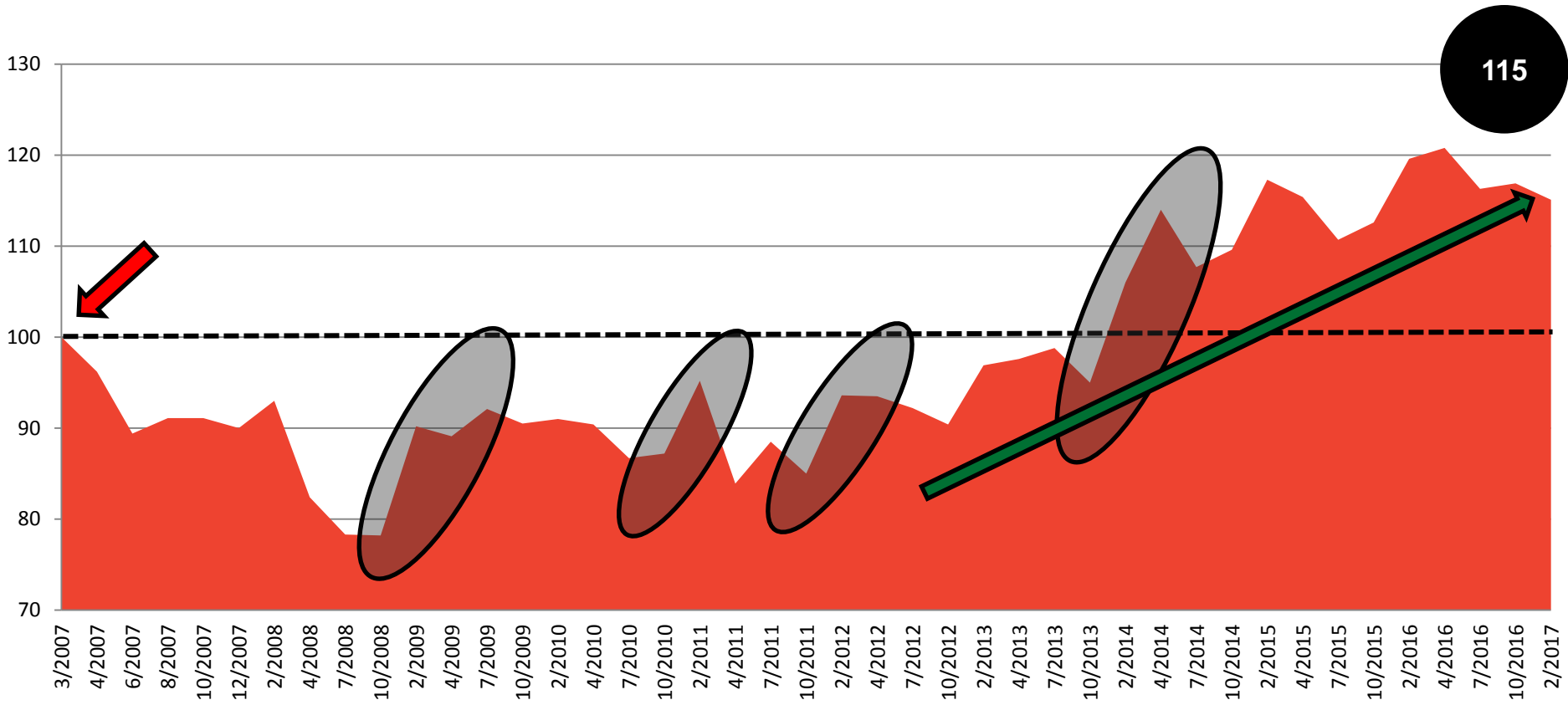




**(n=2,300, every 90 days since Q1, 2007)**

# THE TRAVELER SENTIMENT INDEX™

(2007 - 2017)

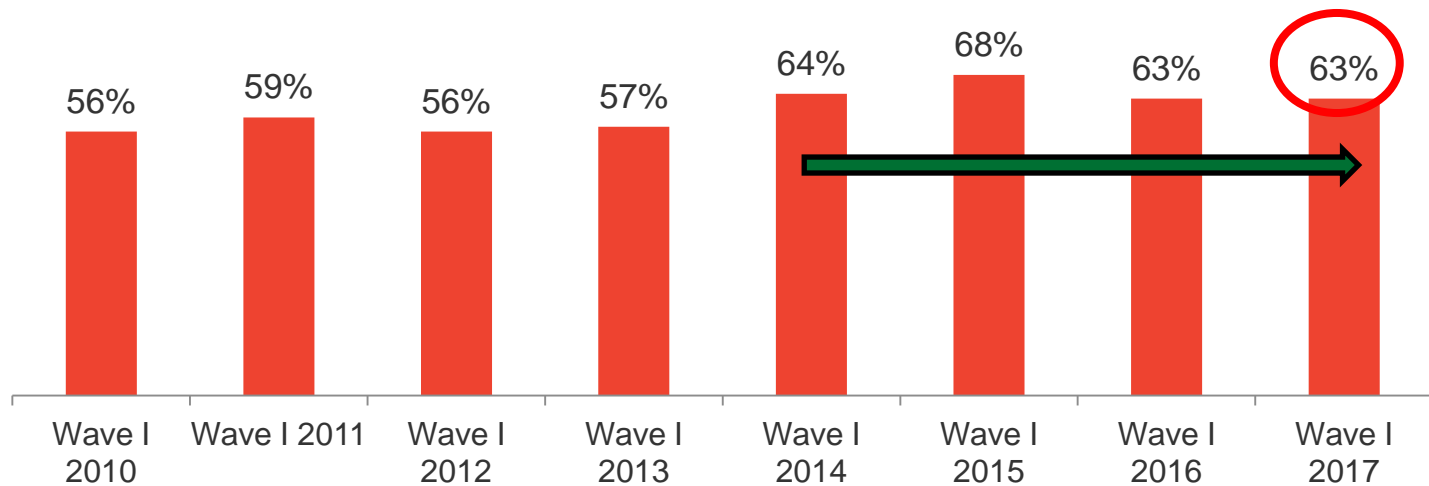


Source: travelhorizons™



# LEISURE TRAVEL INTENTIONS

Plan to Take at Least One Leisure Trip During the Next Six Months



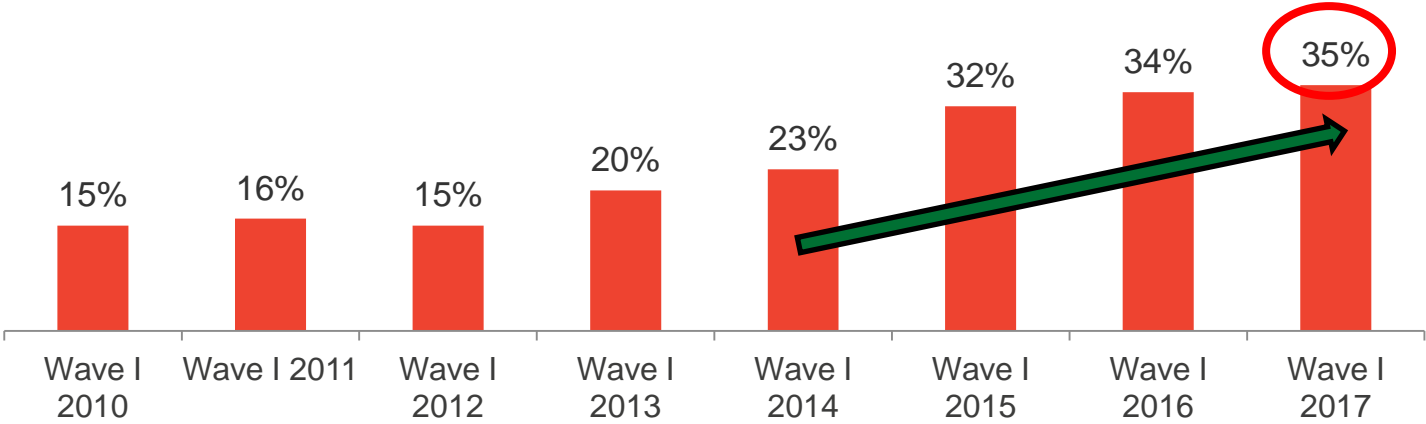
Source: travelhorizons™





# BUSINESS TRAVEL INTENTIONS

Plan to Take at Least One Business Trip During the Next Six Months



Source: travelhorizons™



# GROWING OPTIMISM

| Very/Extremely Optimistic About: | %<br>2014 | %<br>2015 | %<br>2016 |
|----------------------------------|-----------|-----------|-----------|
| Future of my children            | 73        | 71        | 83        |
| My future                        | 73        | 70        | 82        |
| Future of my job                 | 62        | 63        | 73        |
| Future of my company             | 61        | 60        | 70        |
| Future of America                | 41        | 39        | 51        |
| Future of the world              | 35        | 35        | 45        |



# THE LONGER-TERM VIEW





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The cover features a large, stylized white 'M' and 'A' logo in the center, set against a background of wavy, layered grey and white shapes. Above the 'M' and 'A' are five small red icons: a train, an airplane, a car, a bus, and a person with a suitcase. The word 'PORTRAIT' is written in large, bold, red, sans-serif capital letters across the middle of the logo.

# PORTRAIT

• OF AMERICAN TRAVELERS •

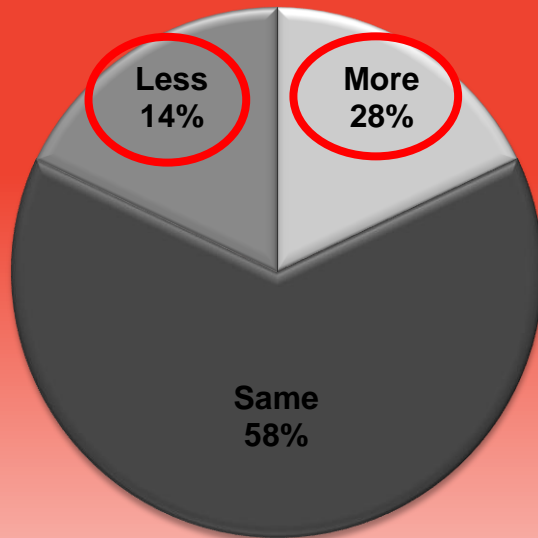
2016 • 2017

EXECUTIVE SUMMARY

- >18 years of age
- Took at least one trip >75 miles from home that required overnight accommodations during last 12 months
- Annual HHI >\$50,000
- n=2,948
- 26<sup>th</sup> year

# MILLENNIALS LEADING THE WAY

## Expected Trips Next Year Versus Last Year



All Active Travelers

|             | Millennials | Xers | Boomers | Matures |
|-------------|-------------|------|---------|---------|
| More Trips  | 45          | 25   | 19      | 18      |
| The Same    | 44          | 61   | 65      | 65      |
| Fewer Trips | 11          | 14   | 16      | 17      |
| Net Δ       | +34         | +11  | +3      | +1      |



# MILLENNIALS V BOOMERS: DIVERGENT MARKET MAKERS



**~ 83,000,000**  
**(18-36 YOA)**



**~ 76,000,000**  
**(51-69 YOA)**



# MOTIVATIONS FOR LEISURE TRAVEL

|                                     | Millennials<br>% | Xers<br>% | Boomers<br>% | Matures<br>% |
|-------------------------------------|------------------|-----------|--------------|--------------|
| Relaxation                          | 88               | 89        | 91           | 83           |
| Get away from home                  | 86               | 89        | 87           | 72           |
| Exploration                         | 84               | 80        | 78           | 68           |
| Experience different cultures       | 81               | 71        | 67           | 66           |
| Enhance relationships               | 77               | 72        | 71           | 57           |
| Experience new cuisines             | 74               | 68        | 61           | 55           |
| Self-discovery                      | 64               | 52        | 43           | 27           |
| Pursue a hobby                      | 59               | 45        | 34           | 24           |
| Meet new people                     | 53               | 41        | 44           | 51           |
| Pursue wellness programs/lifestyles | 50               | 39        | 24           | 20           |
| Play/participate in a sport         | 43               | 27        | 18           | 10           |

# INTEREST IN VISITING HOUSTON (NEXT TWO YEARS)



# % OF U.S. LEISURE TRAVELERS INTERESTED IN VISITING HOUSTON

**30%**

(San Antonio - 39%, Dallas - 32%)



# % INTERESTED IN HOUSTON BY GENERATIONAL GROUP

| Millennials<br>18-34 | Gen Xers<br>35-48 | Boomers<br>49-67 | Matures<br>68+ |
|----------------------|-------------------|------------------|----------------|
| 50%                  | 27%               | 20%              | 3%             |



# % INTERESTED IN HOUSTON BY ANNUAL HHI

| \$50-\$125K | \$125-\$249K | >\$250K |
|-------------|--------------|---------|
| 75%         | 19%          | 6%      |





FOR MORE INFORMATION:

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