



MMGY GLOBAL

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WE INSPIRE PEOPLE
TO GO PLACES.

THE NEAR-TERM VIEW





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

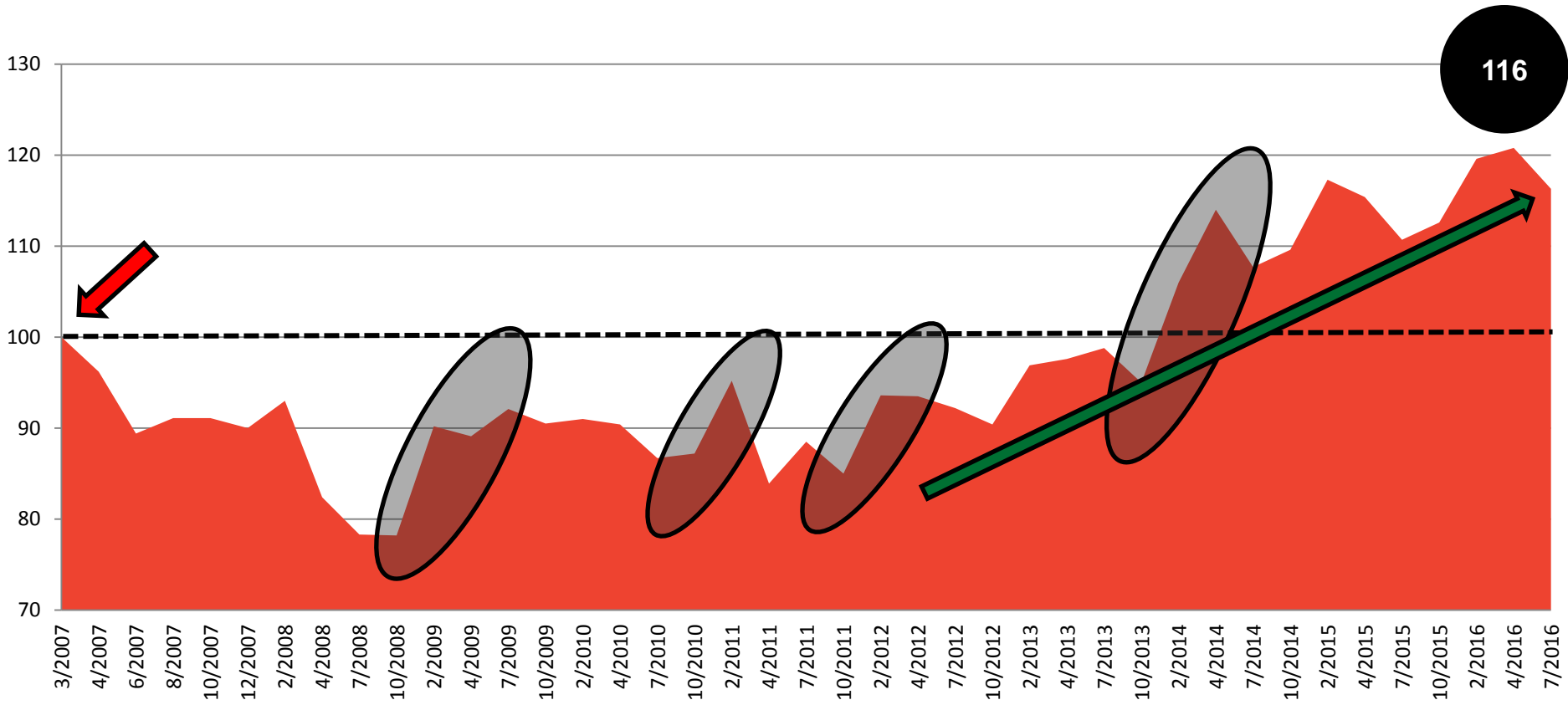
THE TRAVELER SENTIMENT INDEX™

(2007 - 2016)

- On-going measurement of six predictive variables:
 - Interest in travel
 - Time available for travel
 - Personal finances available for travel
 - Affordability of travel
 - Expected quality of travel services
 - Safety of travel

THE TRAVELER SENTIMENT INDEX™

(2007 - 2016)



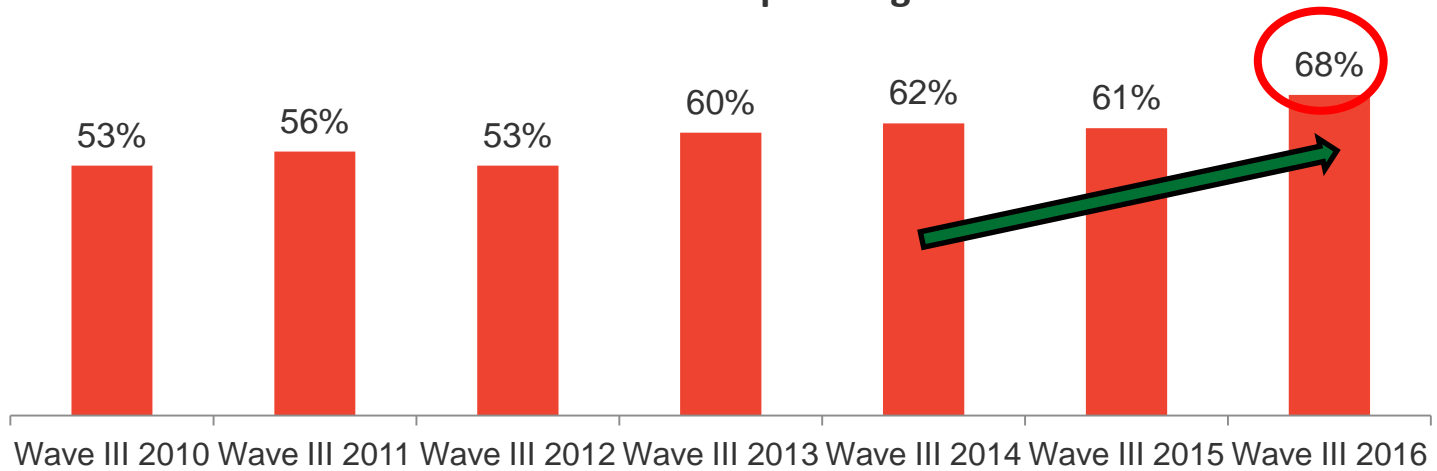
Source: travelhorizons™





LEISURE TRAVEL INTENTIONS

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



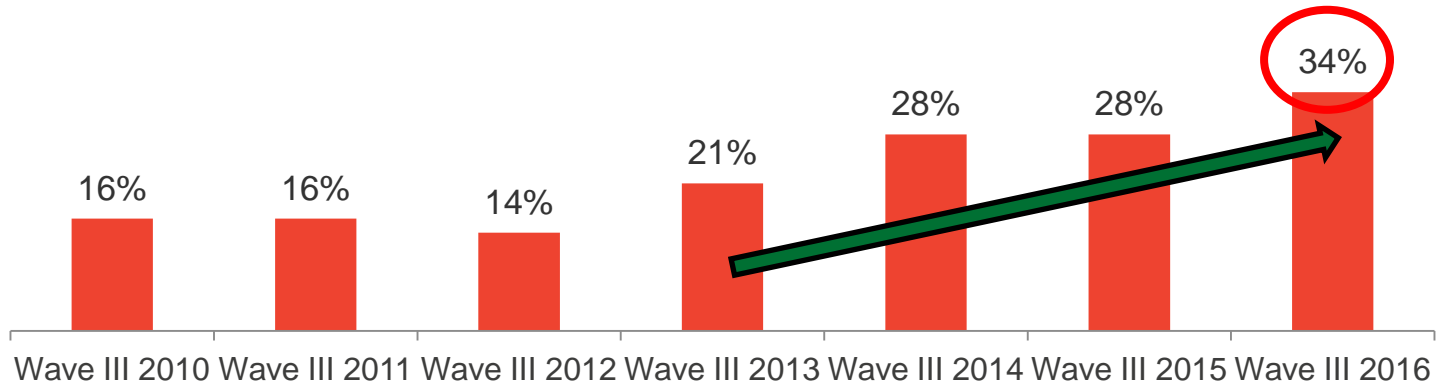
Source: travelhorizons™





BUSINESS TRAVEL INTENTIONS


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



Source: travelhorizons™



GROWING OPTIMISM

Very/Extremely Optimistic About:	% 2014	% 2015	% 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



MMGY GLOBAL

The cover features a large, stylized white 'M' and 'A' logo in the center, with a red 'P' and 'T' integrated into the design. Above the logo are five small red icons: a train, an airplane, a car, a bus, and a person. The background consists of wavy, layered grey and white shapes. The entire cover is framed by a thick red border.

PORTRAIT

• OF AMERICAN TRAVELERS •

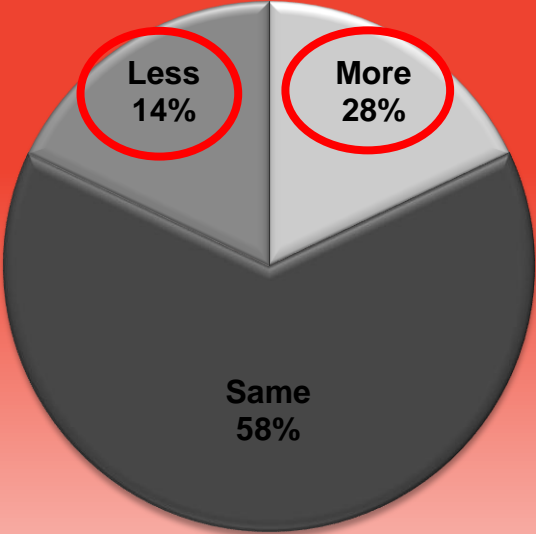
2016 • 2017

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
- 26th 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 %	Xers %	Boomers %	Matures %
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 SELECTED DESTINATIONS (NEXT TWO YEARS)



% OF U.S. LEISURE TRAVELERS INTERESTED IN VISITING SANTA BARBARA

40%

(Napa Valley - 51%; LA – 43%; Palm Springs – 38%)



% INTERESTED BY GENERATIONAL GROUP

Millennials 18-34	Gen Xers 35-48	Boomers 49-67	Matures 68+
43%	29%	24%	3%



FOR MORE INFORMATION:

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