



The Road Trip Traveler

**A SNAPSHOT OF U.S. ROAD
TRIP TRAVELERS AND THE
WORLD CUP OF IT ALL**

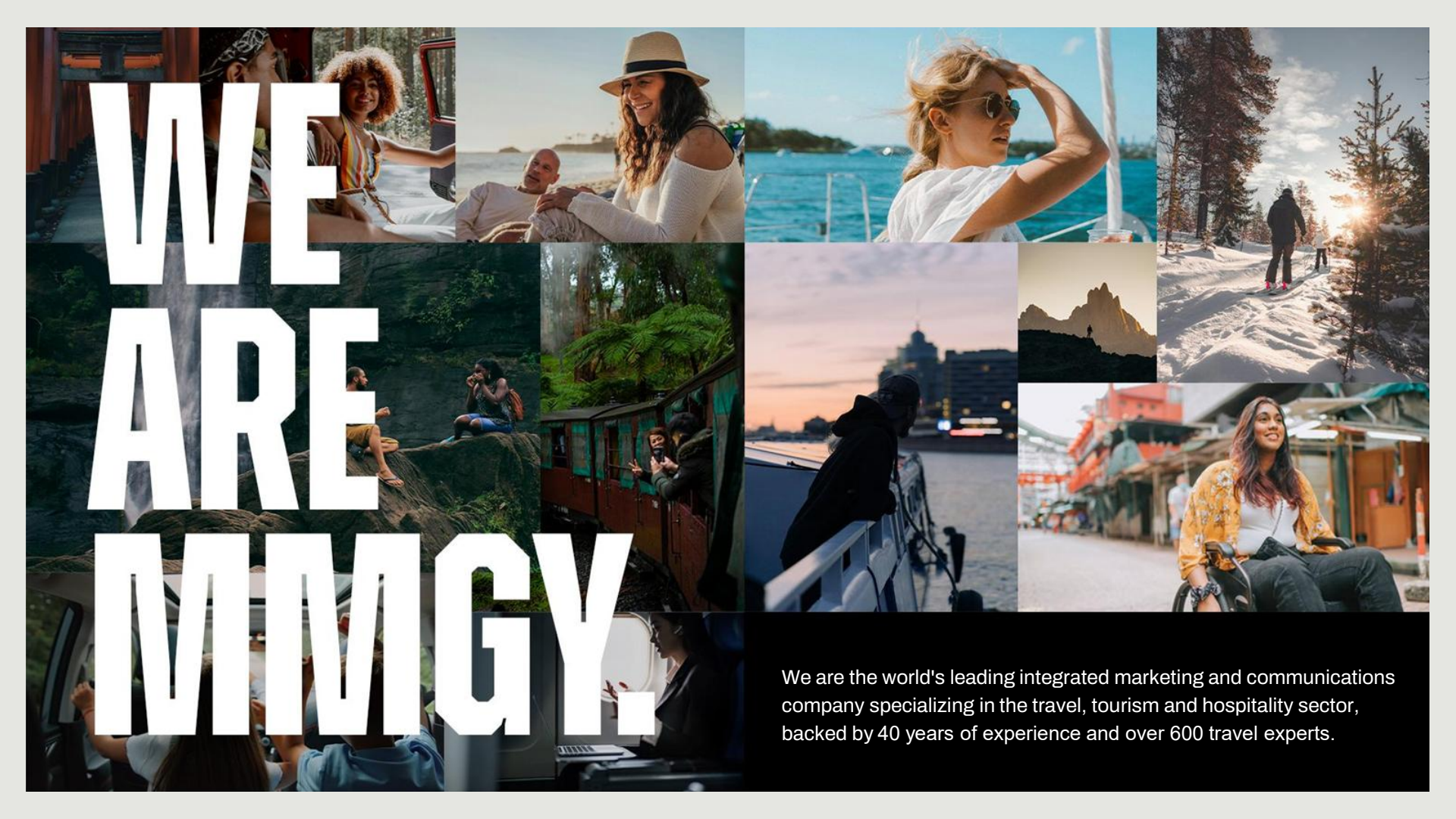
DATE
October 20, 2025

PRESENTER
Hannah Knott

WHO AM I?

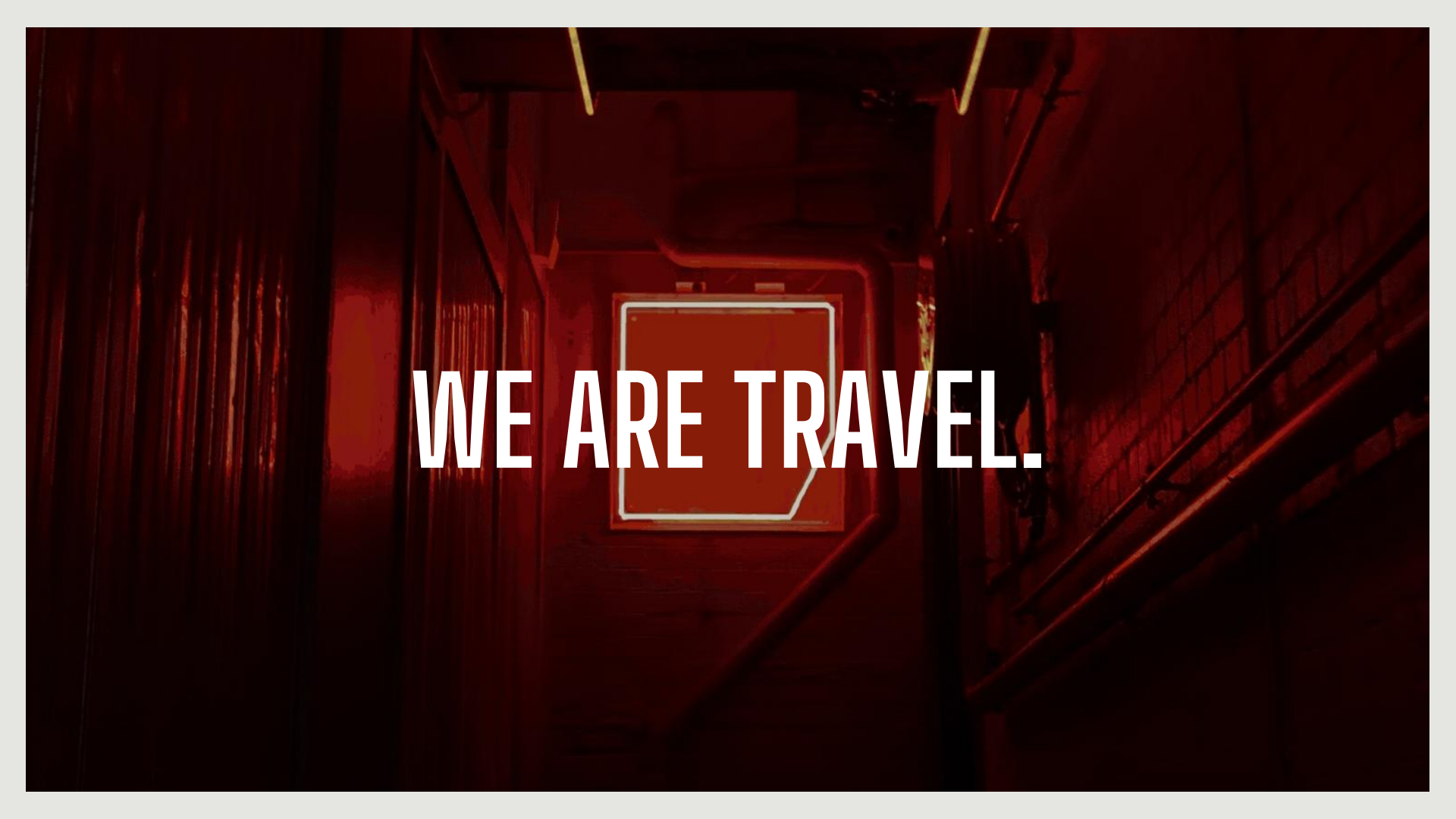
Hannah Knott
Strategic Planner, MMGY





WE ARE MMGY.

We are the world's leading integrated marketing and communications company specializing in the travel, tourism and hospitality sector, backed by 40 years of experience and over 600 travel experts.

A dark, industrial hallway with a glowing square light fixture in the center. The walls are made of brick and metal pipes are visible. The text "WE ARE TRAVEL." is overlaid in white, bold, sans-serif font.

WE ARE TRAVEL.

UNDERPINNED BY ACCESSIBLE RESEARCH



EurekA! – A seriously searchable research platform that puts MMGY Travel Intelligence's industry-leading travel performance data in your control.

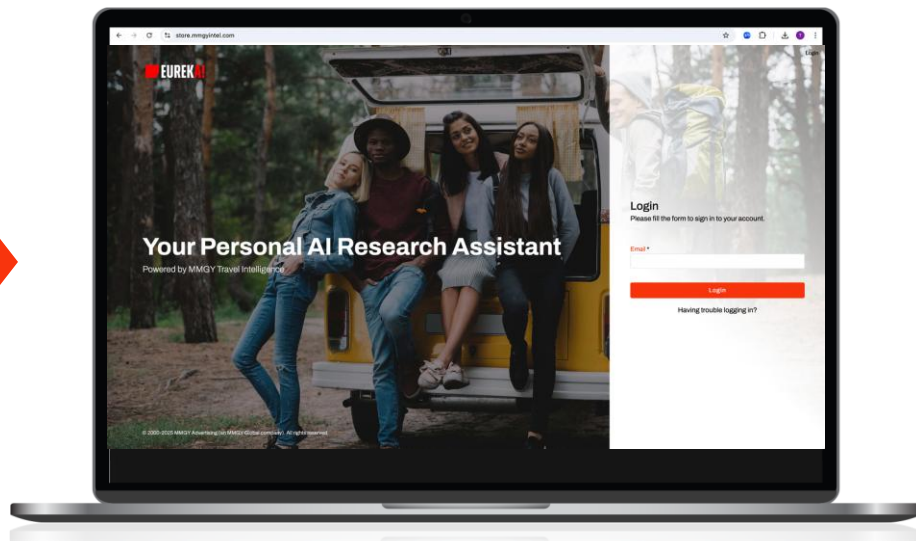


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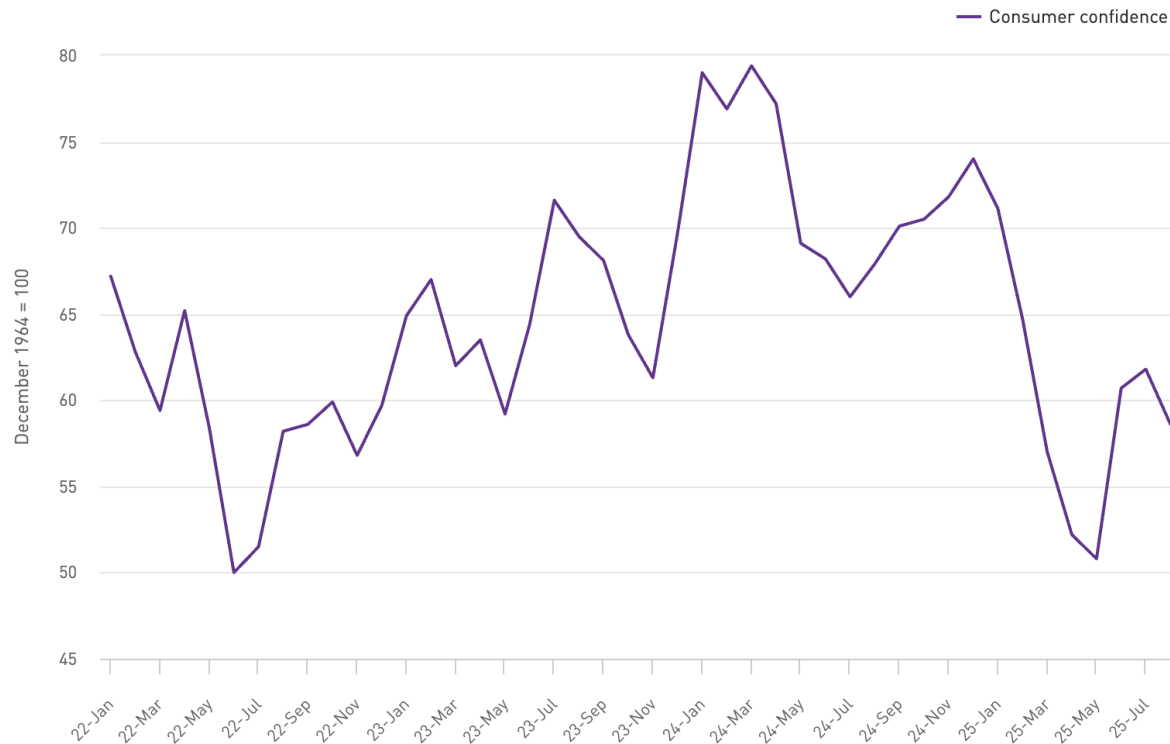
3 The Game

4 The World Cuppers

LET'S SET THE STAGE.

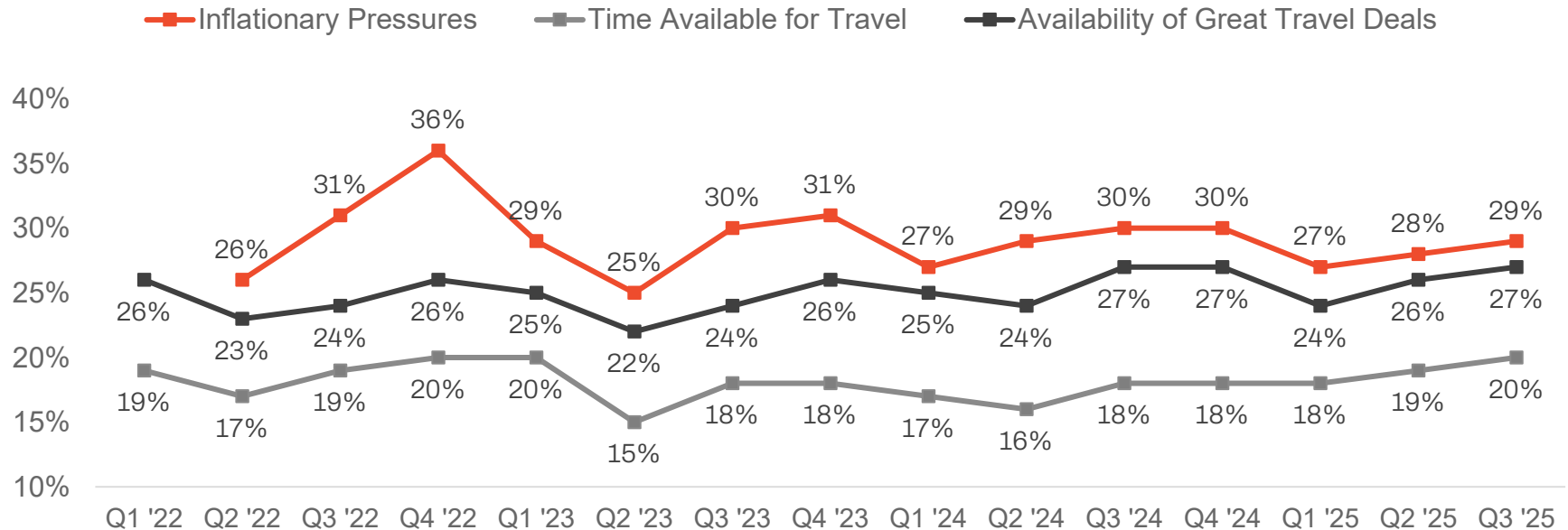
CONSUMER CONFIDENCE DROPS AFTER SUMMER SPIKE

U.S.
Consumer
Sentiment
Index,
2022-25



INFLATIONARY PRESSURES ON HOUSEHOLD BUDGETS CONTINUE TO AFFECT AMERICAN VACATION PLANS

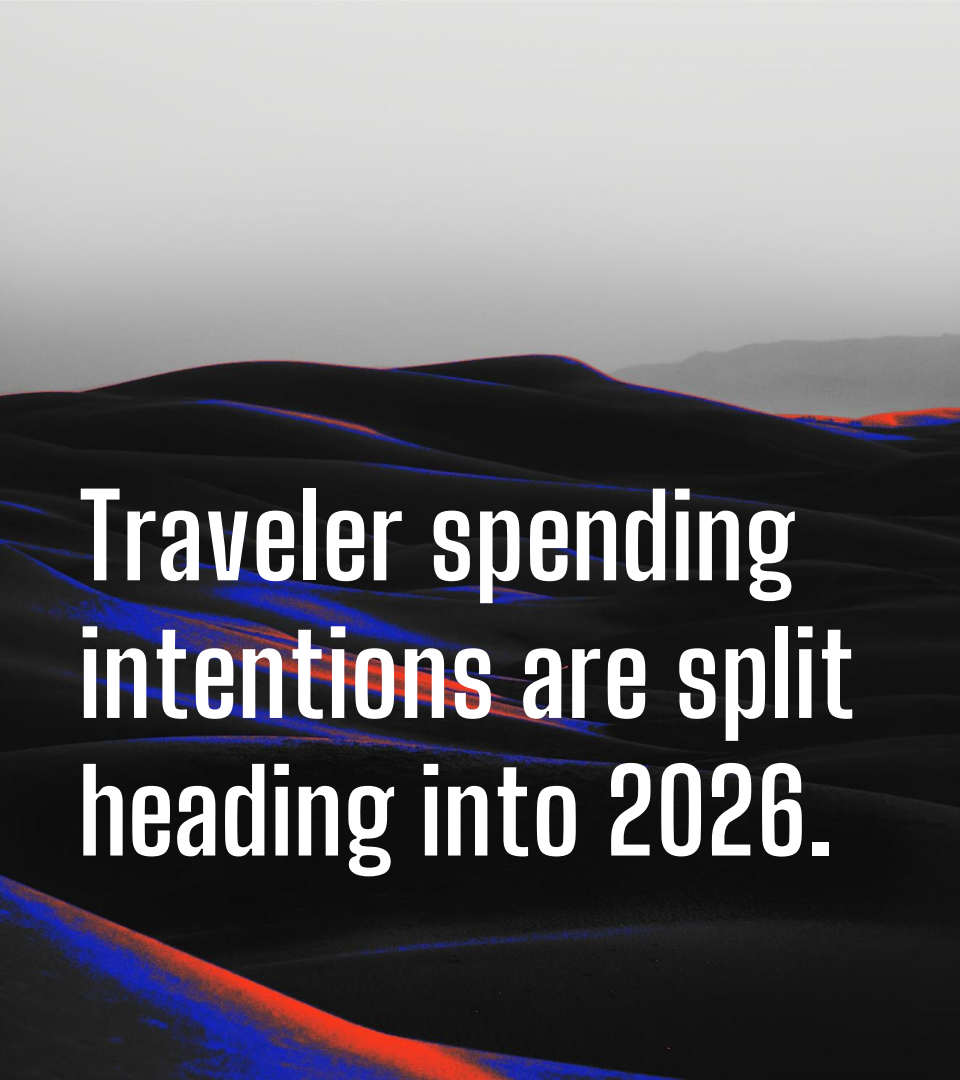
Extreme Impact of Select Variables on Leisure Travel in Next Six Months



**Travel intent
remains high –
but could stay
aspirational.**

78%

**of U.S. adults are planning
their next vacation in the
next 12 months.**



**Traveler spending
intentions are split
heading into 2026.**

57%

of consumers plan to spend more on travel in 2026 compared to 2025.

vs.

40%

of consumers plan to cut back on travel spending in 2026 compared to 2025.



30%

spend more time
looking for travel
deals.



28%

monitor travel
budgets more
closely.



26%

go on shorter trips.



24%

engage with more
travel loyalty
programs to offset
costs.

**IN TIMES OF
ECONOMIC
HARDSHIP
WE SEE ...**

**EVENT TRAVEL AS A
WAY TO MAXIMIZE
LEISURE BUDGETS**

ROAD TRIPS

**IN TIMES OF
ECONOMIC
HARDSHIP
WE SEE ...**

EVENT TRAVEL

**ROAD TRIPS
FOR QUICK,
BUDGET-FRIENDLY
GETAWAYS**

THE EVENT TRAVELER

the party hard-er

WHAT WE'VE SEEN:

When budgets are tight,
travelers combine their
leisure and travel budgets
and look for *reasons* to travel.





77%

of U.S. consumers intend to take a trip to attend an event or support their special interest.

66%

of U.S. sports travelers prefer engaging in event travel with their friends.

63%

of U.S. consumers rely on social media to discover live events, surpassing traditional media channels like TV and newspapers.

62%

of U.S. event travelers agree that people in their fan communities are good sources of event travel information.

WHY IT MATTERS

The U.S. is in for a jam-packed couple of years with the FIFA World Cup 2026, the 250th birthday of the country and the 2028 Summer Olympics in LA.



WHAT PERCENT OF U.S. CONSUMERS PLAN TO TRAVEL FOR A SPECIAL EVENT OR INTEREST THIS YEAR?

A 38%

B 92%

C 53%

D 77%

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A 38%

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THE ROAD-TRIP TRAVELER

beep beep!

WHAT PERCENT OF ACTIVE LEISURE TRAVELERS SAY THEY WILL TAKE A ROAD TRIP IN THE NEXT 12 MONTHS?

A 27%

B 71%

C 42%

D 80%

WHAT PERCENT OF ACTIVE LEISURE TRAVELERS SAY THEY WILL TAKE A ROAD TRIP IN THE NEXT 12 MONTHS?

A **27%**

B **71%**

C **42%**

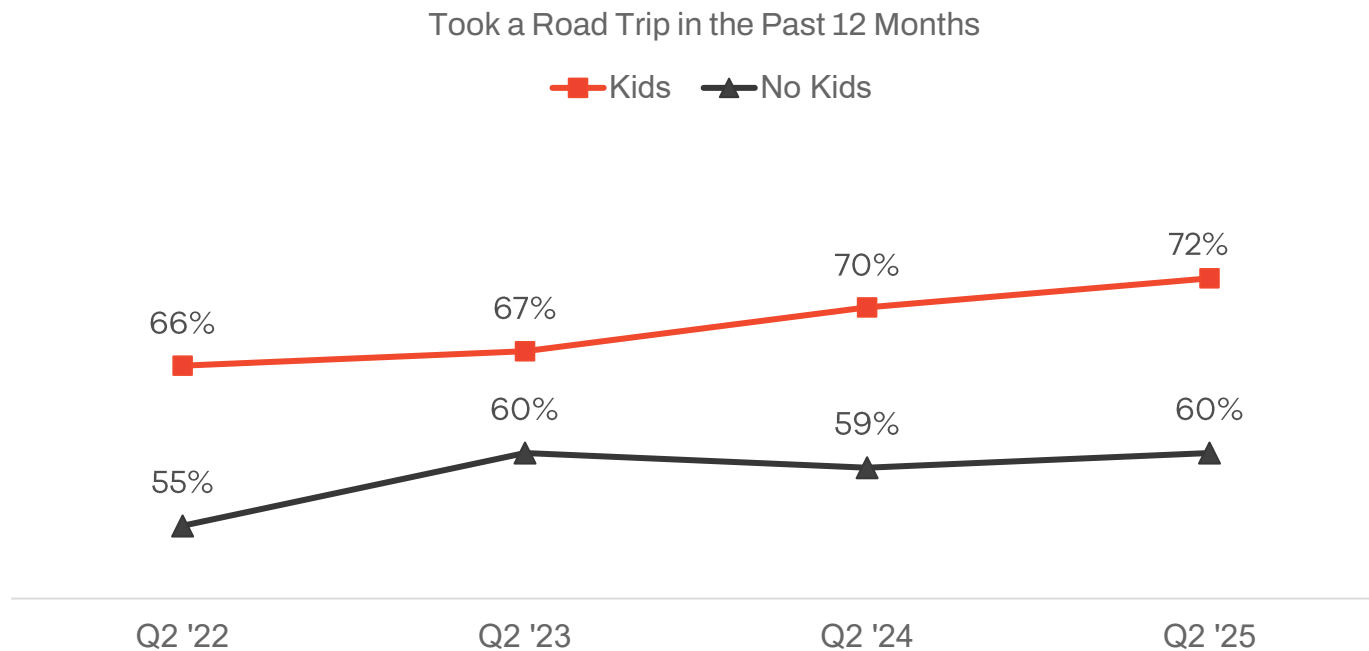
D **80%**



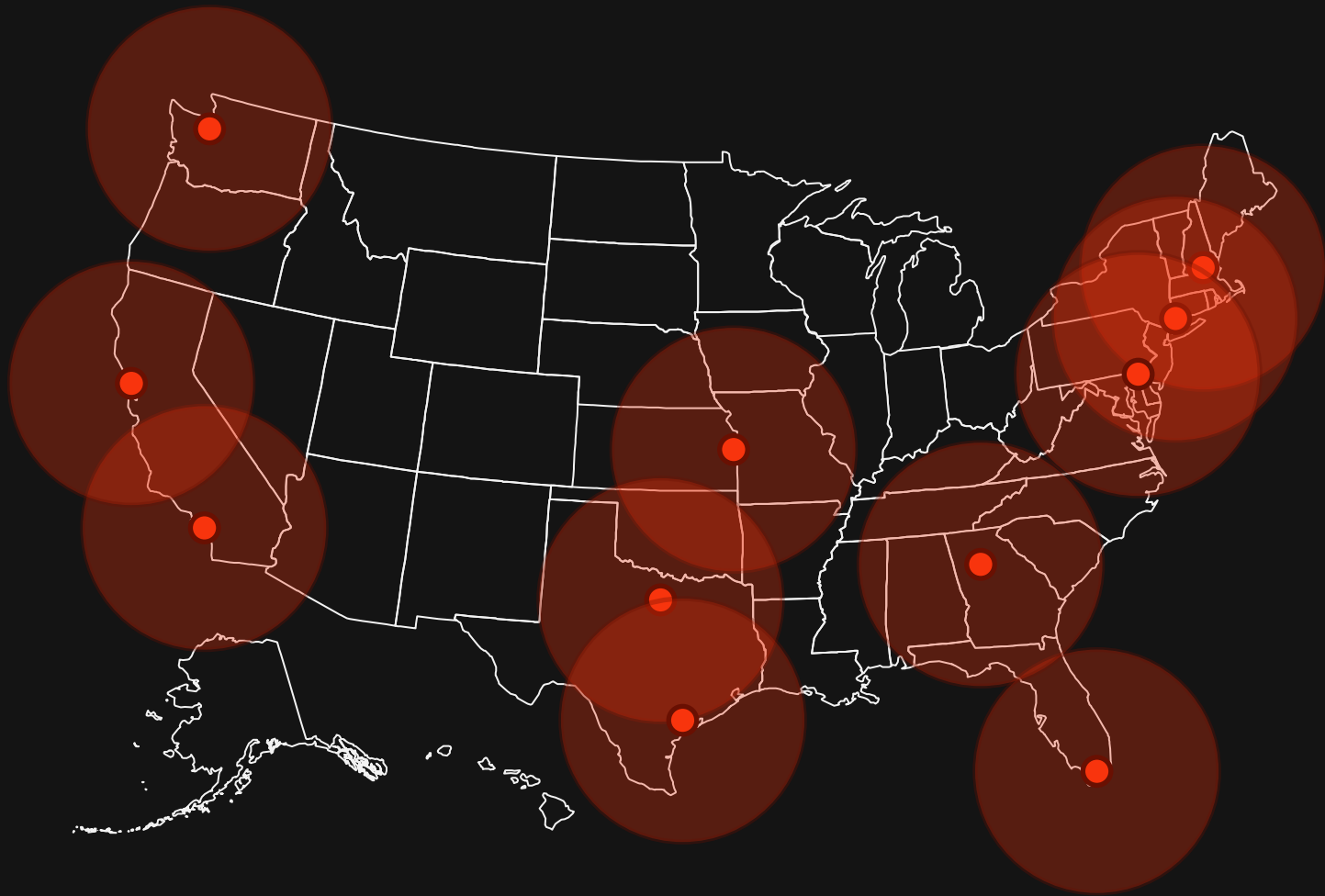
71%

of active leisure travelers
intend to take a road trip
in the next 12 months.

TRAVELERS WITHOUT CHILDREN IN THE HOUSEHOLD SHOW INCREASING INTEREST IN ROAD TRIPS

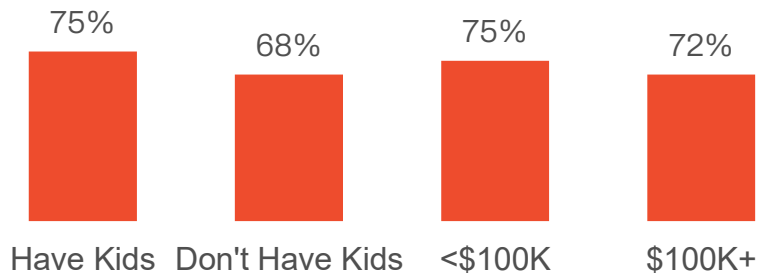


ROAD
TRIPPERS
WILL
TRAVEL UP
TO **983**
MILES
ROUND TRIP.

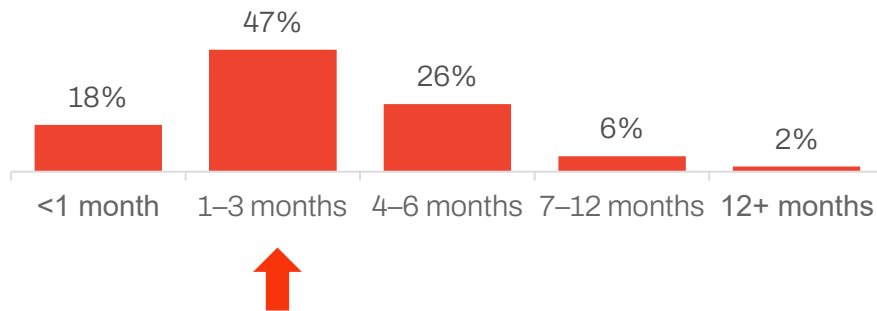


LAST-MINUTE PLANNERS & BUDGET TRAVELERS

% INTEND TO TAKE A ROAD TRIP IN THE NEXT 12 MONTHS

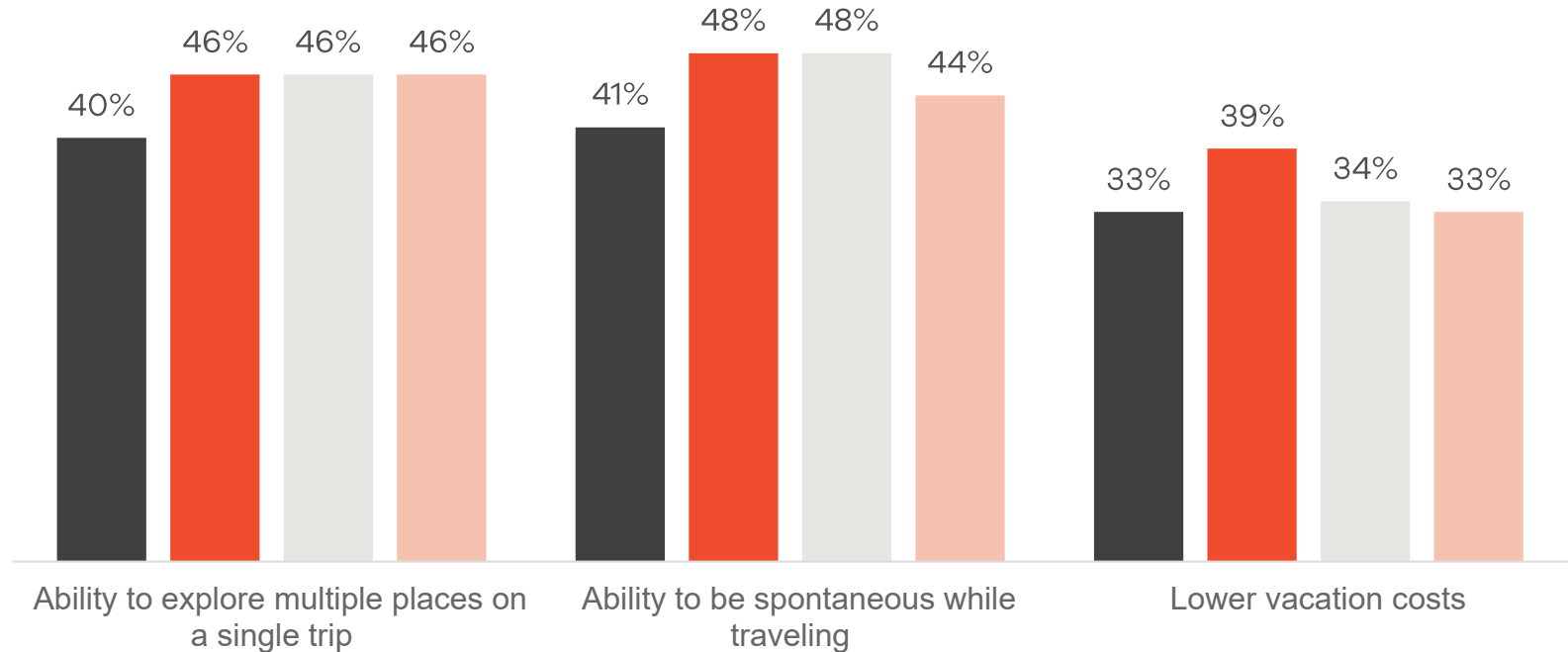


HOW FAR IN ADVANCE DO YOU TYPICALLY PLAN A ROAD TRIP?



ROAD TRIP MOTIVATORS

■ Q2 '22 ■ Q2 '23 ■ Q2 '24 ■ Q2 '25



THE NOSTALGIA-SEEKER

NOSTALGIA RISES IN TOUGH TIMES

Economic and social factors are
leading consumers to seek an escape.

**Regardless of generation,
consumers around the world are
seeking ways to detach from
everyday worries and stressors.**

NOSTALGIA RISES IN TOUGH TIMES

Economic and social factors are leading consumers to seek an escape.

Regardless of generation, consumers around the world are seeking ways to detach from everyday worries and stressors.

BUT NOSTALGIA FOR WHAT?

57% Americans would like their country to be how it used to, with both younger individuals and more youthful markets idealizing the simplicity and perceived ease of an age they never knew.

Despite this, less than half (46%) would prefer to have grown up when their parents were children.

NOW-STALGIA

the act of
breathing new life
into the past



ANY COOL EVENTS HAPPENING IN 2026?

OH YEAH ...

FIFA WORLD CUP 2026



WHICH GENERATION IS MOST LIKELY TO LEAVE THE HOST CITIES FOR A RELAXING WEEKEND BREAK ?

A Gen Z

B Millennial

C Gen X

D Boomer

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A Gen Z

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**U.S. leisure
travelers are
ready to get in
on the action.**

21%

**of active leisure travelers
plan to travel specifically
for the FIFA World Cup
2026 men's tournament.**

KANSAS CITY MATCH SCHEDULE

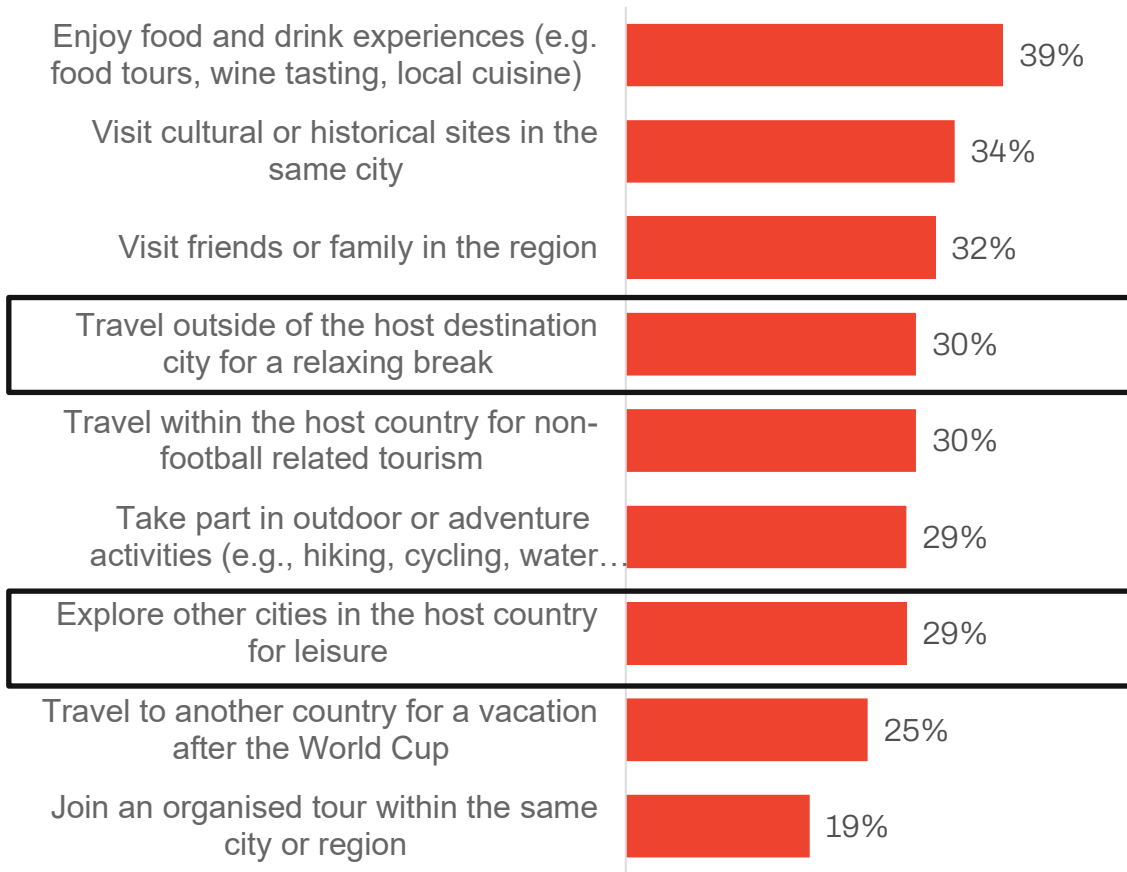
- TUESDAY, JUNE 16
- SATURDAY, JUNE 20
- THURSDAY, JUNE 25
- SATURDAY, JUNE 27
- FRIDAY, JULY 3
- SATURDAY, JULY 11

DALLAS MATCH SCHEDULE

- SUNDAY, JUNE 14
- WEDNESDAY, JUNE 17
- MONDAY, JUNE 22
- THURSDAY, JUNE 25
- SATURDAY, JUNE 27
- TUESDAY, JUNE 30
- FRIDAY, JULY 3
- MONDAY, JULY 6
- TUESDAY, JULY 14

THE WORLD CUP HALO EFFECT

WHAT OTHER ACTIVITIES ARE YOU PLANNING DURING YOUR TRIP TO A WORLD CUP MATCH?



39% OF GEN ZERS

intend to explore other cities within the host country for leisure.

35% OF MILLENNIALS

plan to travel outside of the host destination city for a relaxing break.

/Source: MMGY's 2025 *Portrait of American Travelers*™ "Fall Edition"





Audience Profiles You Can Trust

**REAL DATA INTO
REAL PEOPLE**

Key Differentiators

- **Behavioral Insights** – Goes beyond demographics to predict where and when consumers will travel
- **Travel-Centric Audiences** – Prebuilt, activation-ready segments across any major DSP
- **Seamless Activation** – Easier targeting across multiple platforms

Data Power

- 60,000+ U.S. households tracked monthly
- National probability sample with census-balanced demographics
- Includes traveler and nontraveler data for accurate market estimates

Why It Works

- Aligns marketing with real travel behavior
- Targets high-value travelers at key moments
- Leverages best-in-class travel data to enhance strategy

THE WORLD CUP TRAVELER

WORLD CUP TRAVELER

Driven – Social – Experience-Seeking

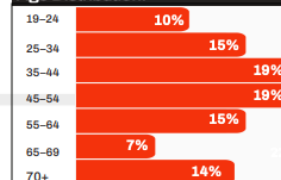
For World Cup Travelers, travel isn't just leisure; it's a way to push boundaries, connect with cultures and gain new perspectives. Tech-savvy and financially confident, they like to balance thoughtful advanced planning with spontaneity. World Cup Travelers are passionate about community and experiences that tap into a shared excitement. Brands that can deliver on these will earn their attention and loyalty.

Brand preferences stem from innovation and cultural relevance. Trendsetting matters, but purpose is essential – brands that champion sustainability and social impact build lasting trust. Loyalty grows when rewards feel meaningful and premium options deliver value. World Cup Travelers also rely on expert-backed recommendations – they believe following the guidance of experts equates to making smart purchase decisions. But at the end of the day, community is key. When a brand aligns with personal values and sparks conversation among their peers, it becomes part of their everyday life.

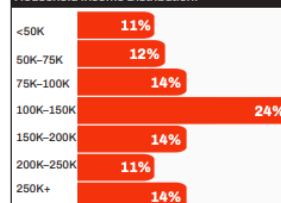
For World Cup Travelers, travel is about immersion in the moment that makes lasting memories. Taking six to seven trips a year, their destinations are chosen with purpose. World Cup Travelers balance adventure, relaxation and world-class experiences. Sporting events, top-tier dining and outdoor pursuits fuel excitement, while positive reviews and social buzz influence choices. Whether a city break, resort escape or road trip, every journey must offer something new, inspiring and worth sharing.

DEMOGRAPHICS

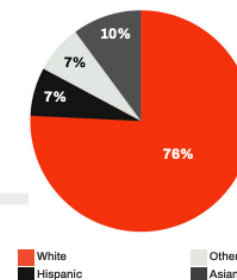
Age Distribution:



Household Income Distribution:



Ethnicities:



Annual Travel Spend: \$2,000+

Children in Household: 43%

ABOUT THIS AUDIENCE

They Are:

- Sports fans
- Tech confident
- Adventurous
- Ambitious
- Gamers
- Open-minded

They Believe:

- Immigration is good for their country
- In talking about mental health
- It is important to explore the world
- They are good at managing money
- In learning about other cultures/countries

They Value:

- Contributing to their community
- Helping others first
- Challenging themselves
- Helping the environment
- Being successful

TRiPs

Audience Profiles You Can Trust

HOT TAKE:
NOT ALL WORLD
CUP HALO TRAVEL
WILL BE ABOUT
SOCCER FANS



KANSAS CAN
BENEFIT FROM
BOTH THE INBOUND
FANS *AND* THE
LOCALS ESCAPING
THE FRENZY



WE'VE SEEN THIS ONE BEFORE ...

'Are There Any Parisians Left?' The Olympics Have Residents Fleeing the City.

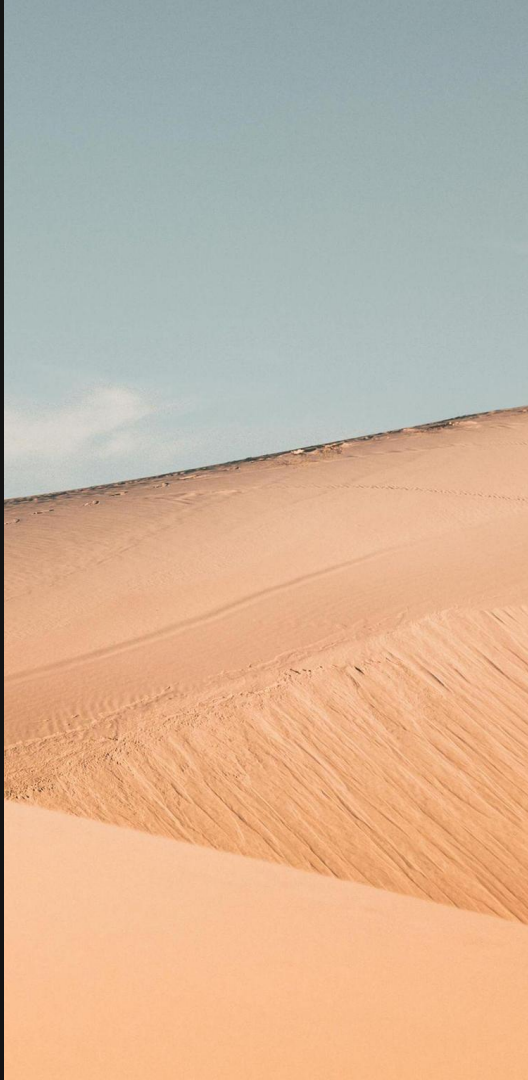
'Are there any Parisians left?' Shopkeepers fear Olympics will become 'obstacle' for business

Restaurant owners are complaining about the impact of traffic restrictions in the capital's center ahead of the Olympic Games opening ceremony.



THE ACTION-AVERSE

“KC will be ...
Too crowded.
Too expensive.
Too loud.”



THE OPPORTUNISTS

“This is the perfect time to get
out of the city and explore ...
maybe I’ll even rent out my
house over the weekend.”



THE WORLD CUP TRAVELER IN A NUTSHELL

THE WORLD CUP HALO

- INBOUND FANS
- INTERNATIONAL VISITORS

“THE GET-ME-OUTTA-HERES”

- KC RESIDENTS
- NEARBY LOCALS

LET'S RECAP

EVENT TRAVELERS

ROAD TRIPPERS

NOW-STALGIA
SEEKERS

LET'S RECAP

EVENT TRAVELERS

ROAD TRIPPERS

NOW-STALGIA
SEEKERS

**LET'S
RECAP**

EVENT TRAVELERS

ROAD TRIPPERS

**NOW-STALGIA
SEEKERS**

**BUT WHAT
DOES IT ALL
MEAN FOR
KANSAS?**

EVENT TRAVELERS

ROAD TRIPPERS

**NOW-STALGIA
SEEKERS**

**BUT WHAT
DOES IT ALL
MEAN FOR
KANSAS?**

**THE PERFECT
STORM!**

EVENT TRAVELERS

ROAD TRIPPERS

**NOW-STALGIA
SEEKERS**

LET'S TALK