



In the mind of Global Travelers

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KEARNEY



We have conducted an extensive global survey of **1,700 respondents** to derive insights on global travelers' changing **preferences and expectations**, and what it takes to **satisfy them**



Our survey aims to help **tourism authorities, developers, and destinations** understand what's driving the decisions of today's travelers



They will be equipped to **tailor their offerings, identify opportunities, and compete with the world's established industry leaders**



International tourist and travel industry

USD **1.5 billion** in 2024

USD **1.8 billion** by 2030



Growing **middle-class** appetite for travel



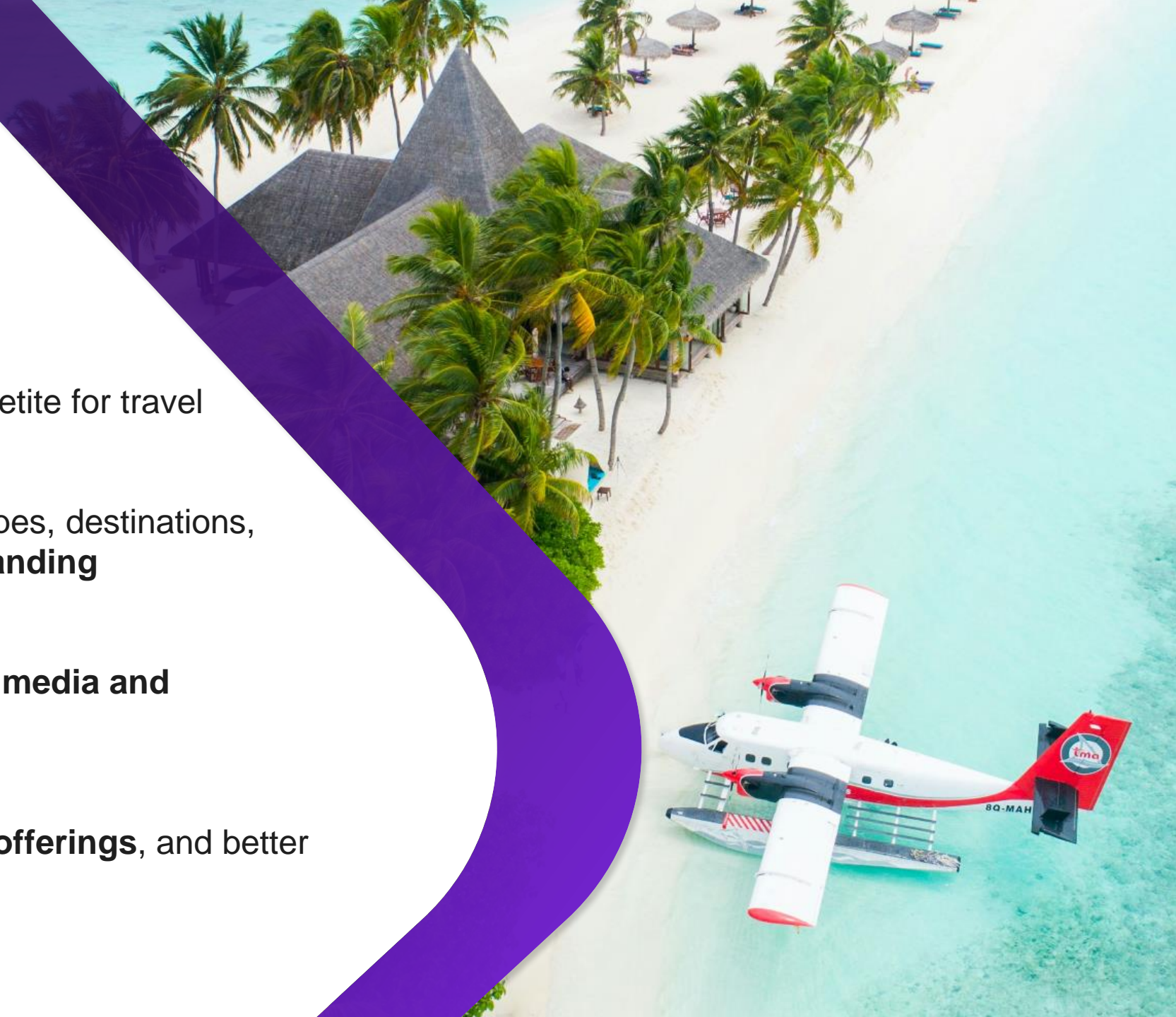
Preferences in vacation types, destinations, and service levels are **expanding**



Increased impact of **social media** and **sustainability**



Iconic destinations, **new offerings**, and better **demand** understanding



Favored Destinations and Travel Types



What are today's hotspots?

Destinations with **established global reputations and strong tourist narratives** are more popular than emerging “niche” destinations



What are today's hotspots?

Destinations with **established global reputations and strong tourist narratives** are more popular than emerging “niche” destinations

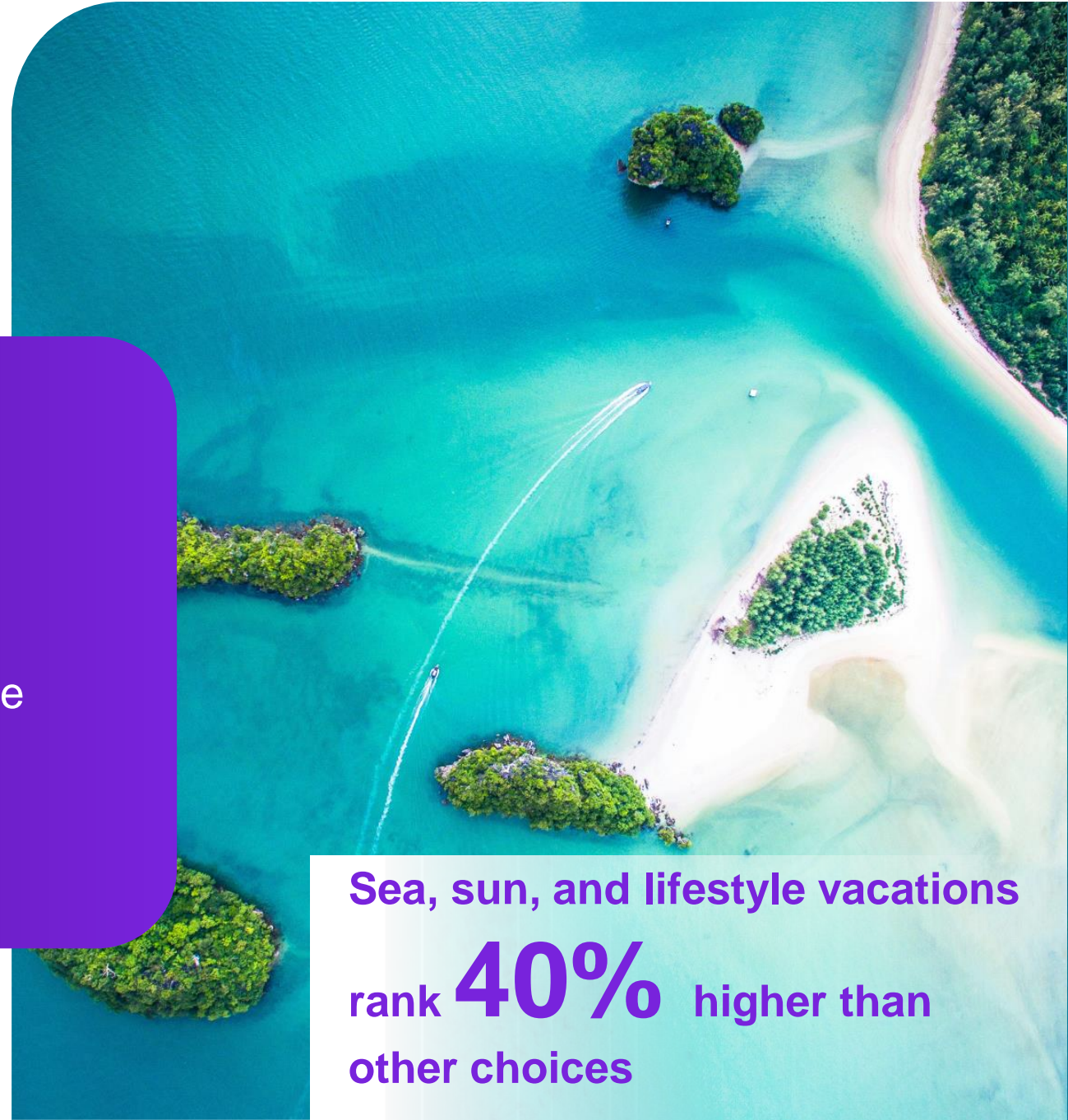
Rank	Wellness 	Heritage 	Events in sports, business, arts & entertainment 	Sea, sun & lifestyle 	Wildlife, ecotourism & agrotourism 
1	California	Rome	Las Vegas	Miami	Kenya
2	Switzerland	Grand Canyon	New York	Bahamas	California
3	Bali	Venice	London	Maldives	Patagonia
4	Spain	Athens	Los Angeles	Dubai	Great Barrier Reef
5	The Alps	Egypt	Sydney	French Riviera	Alps
6	Phuket	Yosemite National Park	Berlin	Sharm-el- Sheikh	Lijiang
7	Marrakech	Kyoto	Shanghai	Costa del Sol	Colorado
8	Aegean Islands	Yucatan	Dubai	Yucatan	Salalah

Beach escapes maintain their universal allure

Sea, sun & lifestyle-related travel
still dominate

Ecotourism becoming more popular, as more
travelers seek sustainable travel compelling and
friendly environmental nature experiences

Sea, sun, and lifestyle vacations
rank **40%** higher than
other choices



Wellness travel is going mainstream

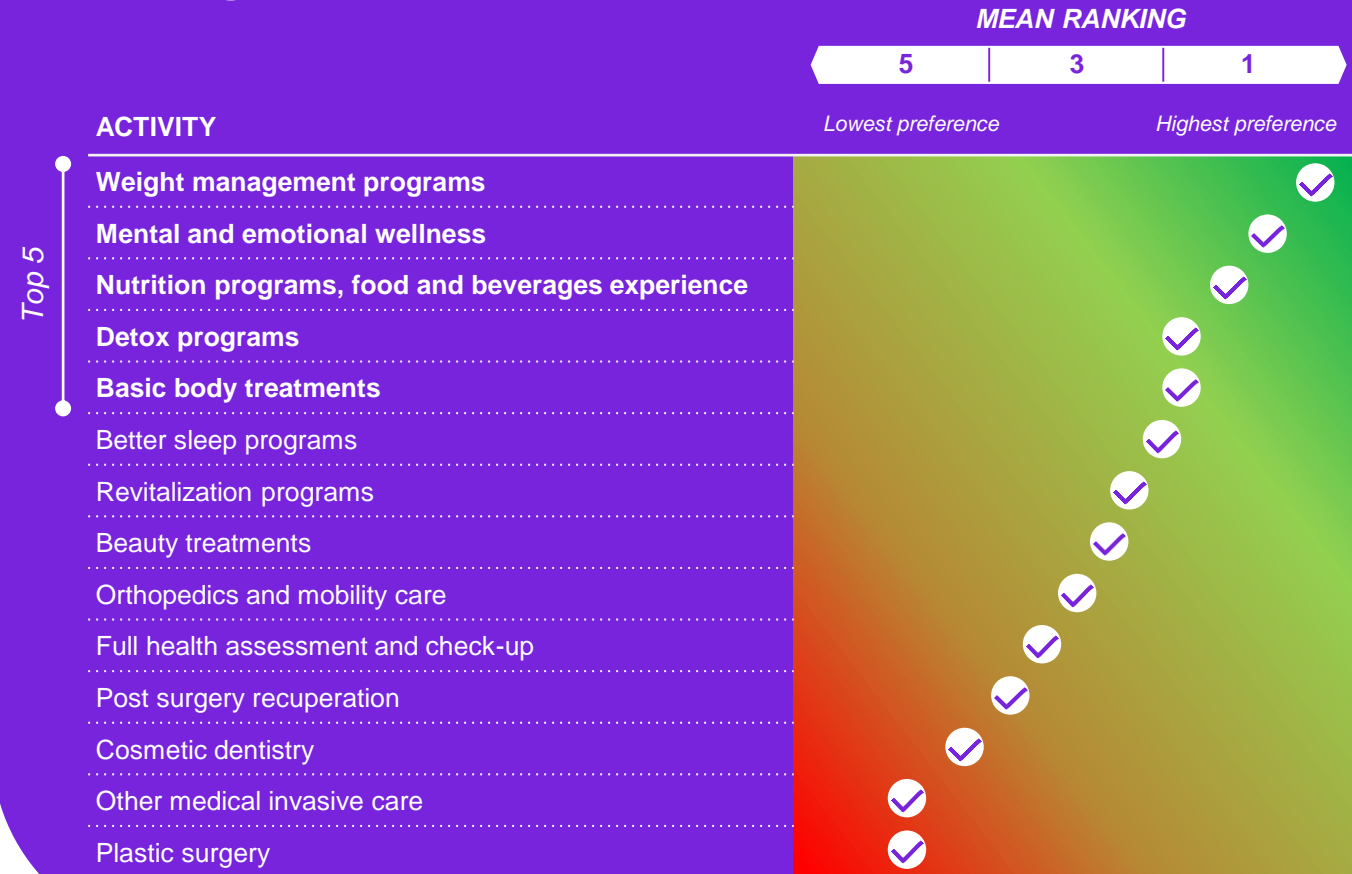
No longer just for luxury travelers

Family-friendly resorts are now available, incl. weight management and mental wellness retreats

30% of wellness travelers now bring their children along



Ranking of wellness activities



Travelers' preferences and priorities



The proximity to urban centers is important

More and more travelers are combining **leisure and business**

More are seeking **leisure adventure** in urban areas, much of it involving **culinary or cultural experiences**



25% of all business travelers plan for “Bleisure” travel

Sustainability is a major goal, but one not always realized

Environmental impact is a **critical consideration...**

...but ultimately, it often takes a **back seat to convenience and comfort**

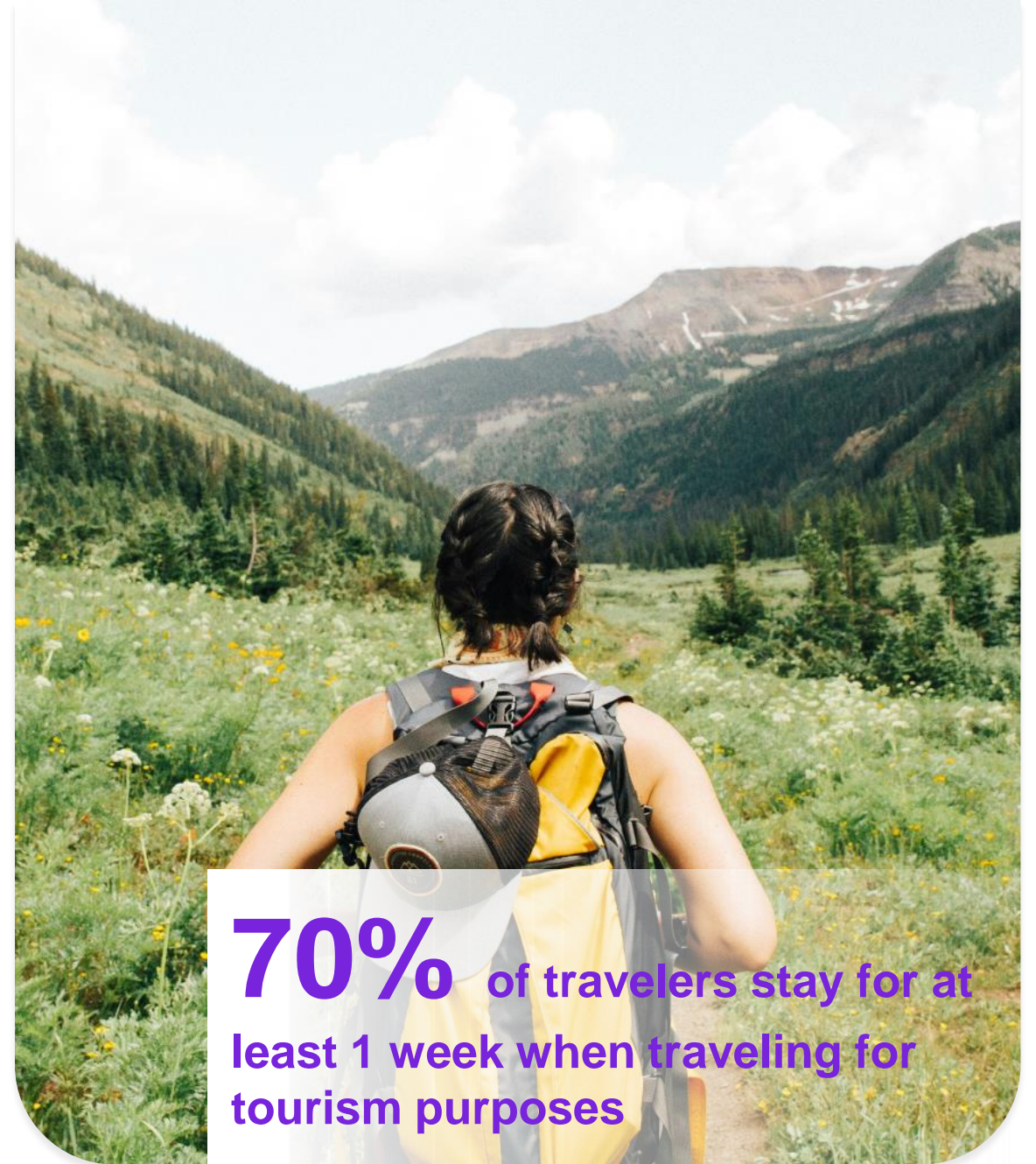
Flight transportation is the

Top 1 option for
travelers to reach their destination

Travelers seek long stays and more activities offsite

75% of travelers spend at least half their time exploring outside of accommodations...

...seeking **immersive experiences** that give them a true sense of the local character and environment



70% of travelers stay for at least 1 week when traveling for tourism purposes

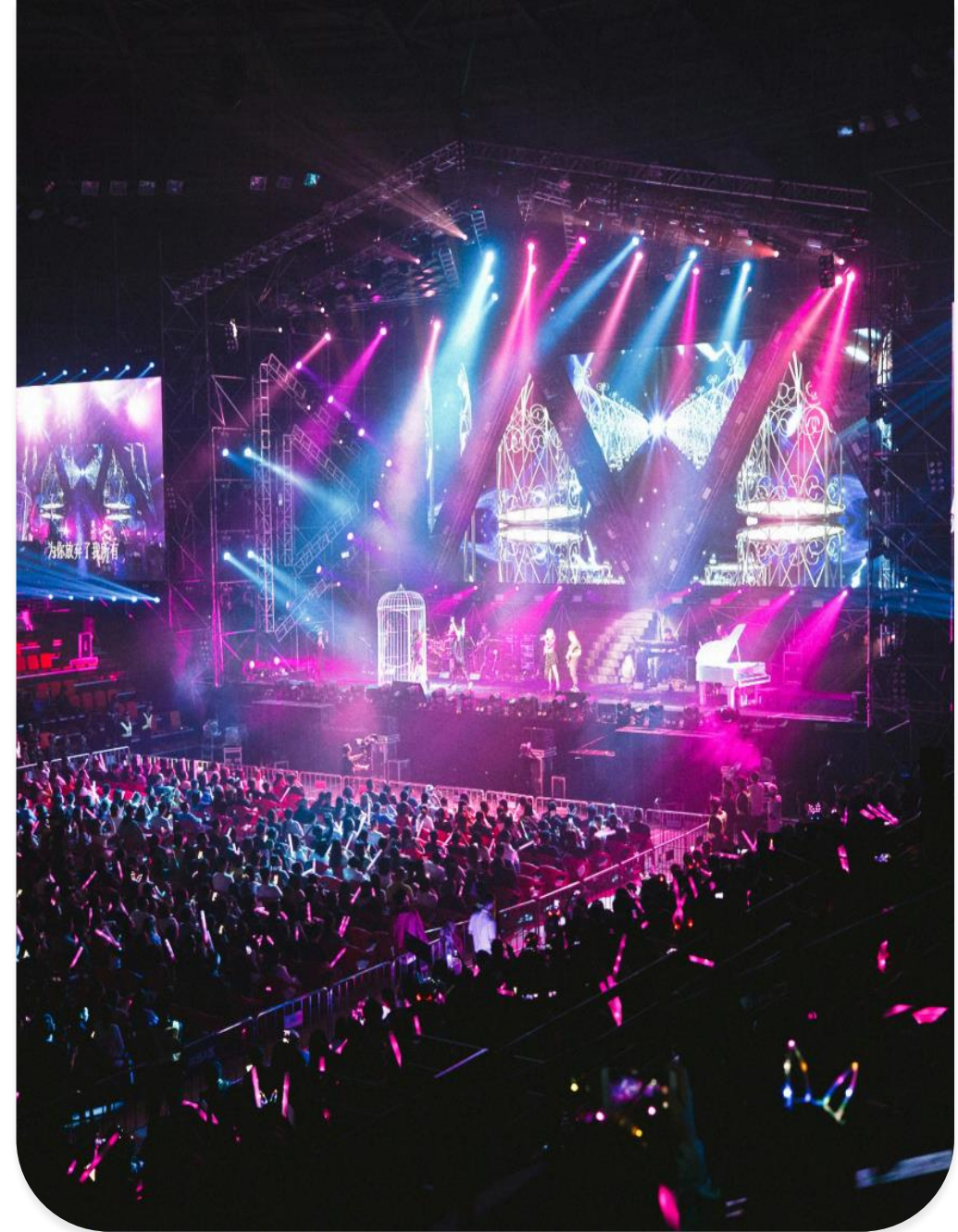
What young travelers want



Gen Zers and millennials are fueling demand for experiential & events tourism

Major events can **transform local economies**

For respondents aged **21 to 24 years old**, events-related travel was the **3rd most popular type of travel**



Younger travelers are at the forefront of sustainable travel

Millennials **advocate for eco-friendly travel options** like minimizing the environmental impact of their travel mode and opting for green mobility alternatives

For those **under age 34**, environmental considerations play a **pivotal role** in their travel decisions



75% of travelers claim that impact on the environment plays a role in their travel decisions

Grasp the opportunity!

...globally...

- ✓ **Adapt** to shifts in consumer preferences and practices
- ✓ **Respond** to the increasing breadth of traveler demands

...and in the Middle East...

- ✓ **Balance** top-down directives with an understanding of the market
- ✓ **Position** as a leading destination
- ✓ **Inform** through data-driven insights and strategies
- ✓ **Set** new standards and offer unparalleled experiences
- ✓ **Stay** ahead of travelers' expectations





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Eco-friendly travel is not just the preference for younger travelers

... **40%** of top-income earners claim the environment plays a big role in their travel choices



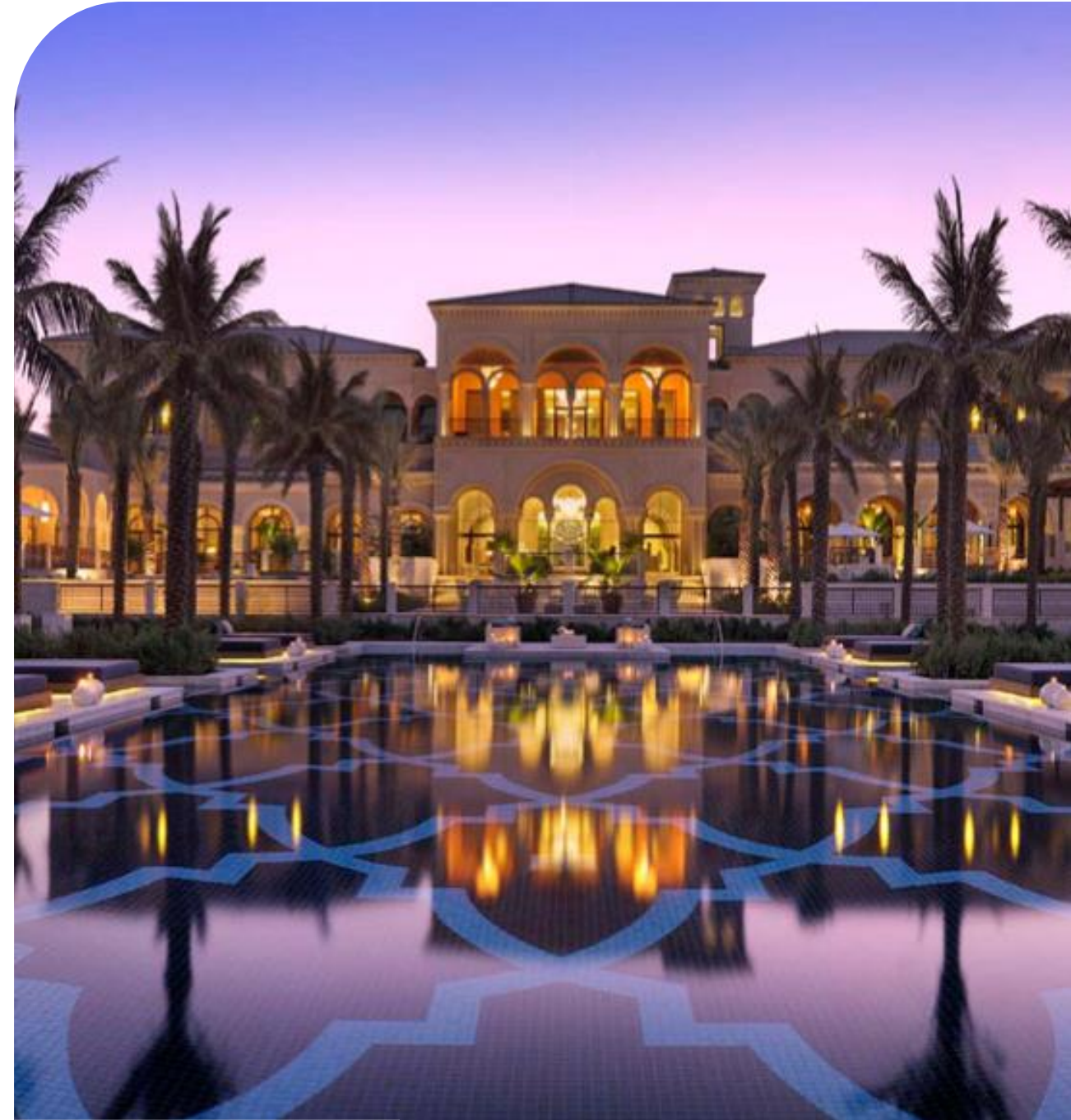
The greatest demand is either for the luxury end or for the budget-friendly end of the spectrum



50% of travelers are willing to spend on premium or luxury services - typically those aged 25 to 44 years or those from developing economies



Budget seekers include **solo travelers** - a growing segment - and those seeking **off-premises adventure**



Incident management is more important than ever

...especially for regions in the **early stages of tourism development**, and especially in the era of **social media**

Understanding and addressing **what delights and what dismays** travelers most is critical to fostering a thriving, competitive industry



Travelers get the greatest satisfaction in trip planning and booking

Disintermediation and technological tools have empowered travelers to manage and customize their trips...

...the **availability of online information** enhances their knowledge and anticipation

