

NC



PORTRAIT

of American Travelers™



2025
SUMMER

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Methodology

Total: 4,509 U.S. adults in May 2025.

North Carolina Prospect : defined as those who intend to take *at least one* overnight leisure trip during the next 24 months **and** are interested in visiting North Carolina (4 or 5 on a 5-point scale) There were a total of 1,703 travelers.

Respondents were selected randomly and participated in a 20-minute online survey. The sample has been balanced by statistical weighting to ensure the data is representative of all leisure travelers in America.

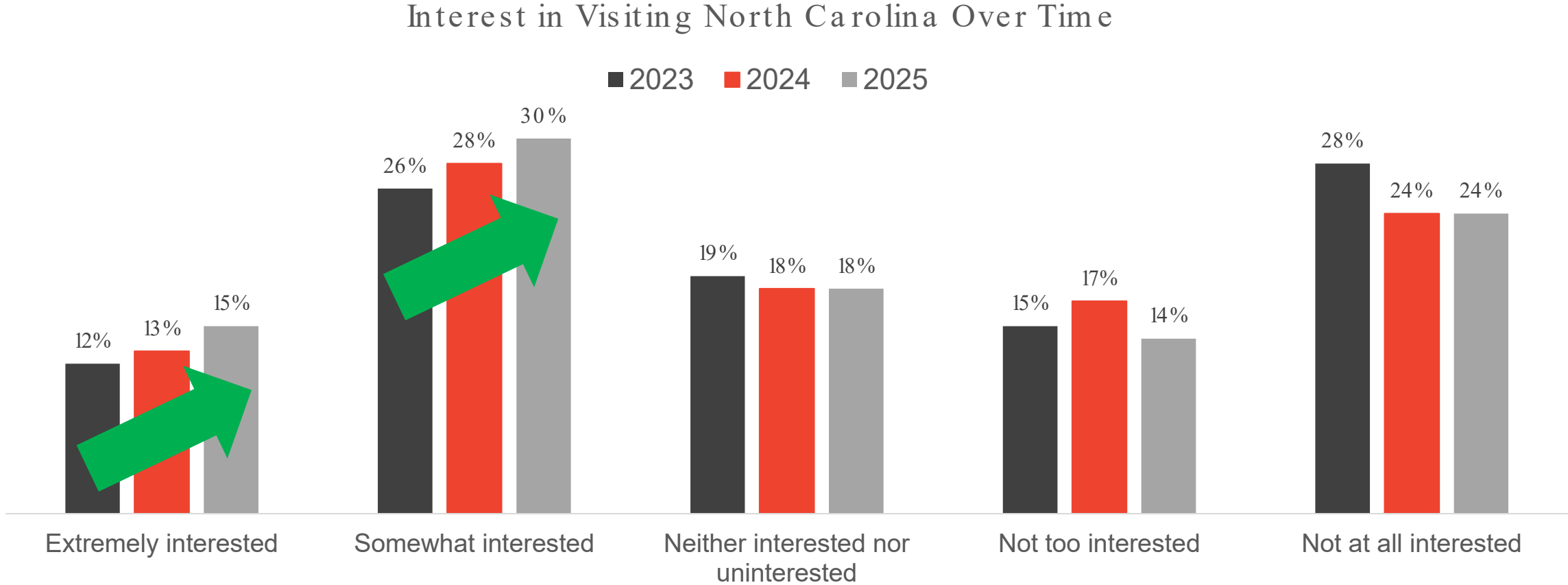
Generation	Age	% of Respondents
Gen Zers	18–28	14%
Millennials	29–44	29%
Gen Xers	45–60	24%
Boomers	61–79	29%
Silent/Gen I	80+	3%

Demographics

	U.S. Leisure Travelers	North Carolina Prospects
Gen Zs	17%	14%
Millennials	27%	34%
Gen Xers	25%	24%
Young Boomers	17%	17%
Older Boomers	11%	9%
Have children under 18 at home	31%	41%
HHI <\$100K	54%	46%
HHI \$100K+	46%	54%
Employed (full or part-time)	59%	70%

North Carolina Prospect

More travelers are interested in visiting North Carolina compared to the previous two years.

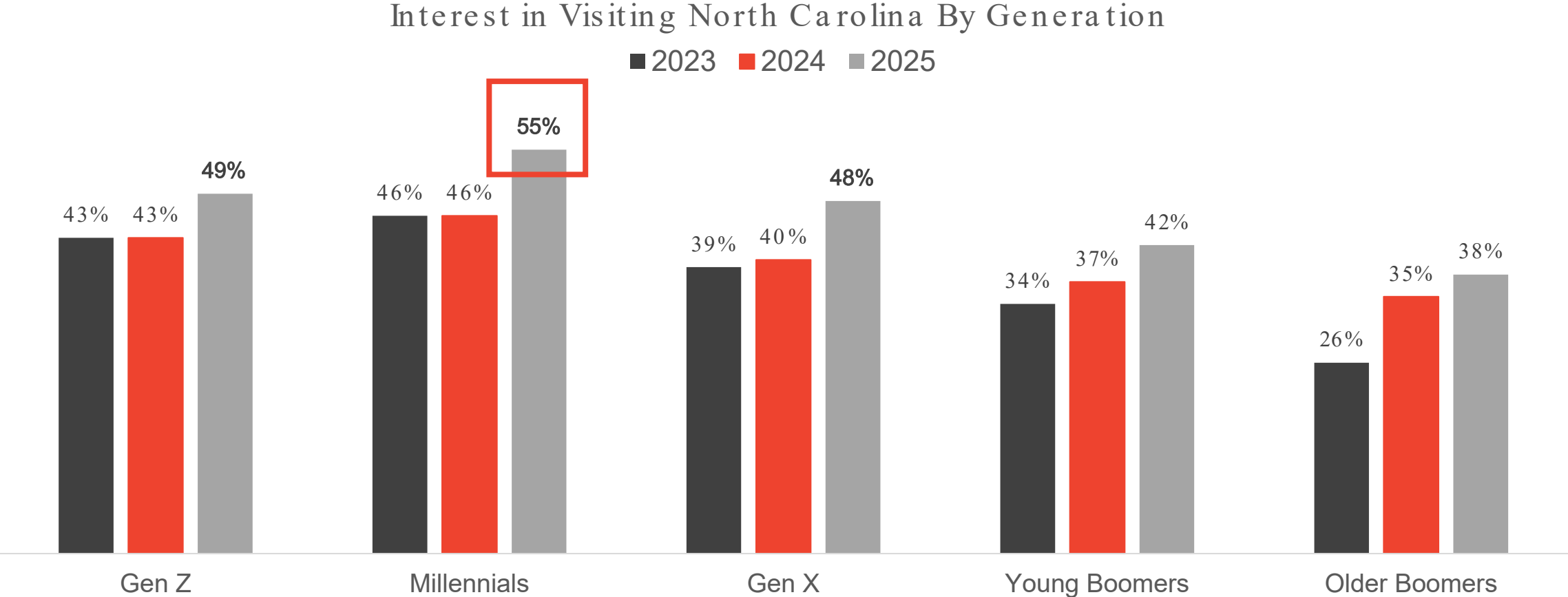


Data in bold indicates a significant difference from Summer 2024.

Base: U.S. Leisure Travelers (n=3,652)

Source: MMGY's 2025 *Portrait of American Travelers*® "Summer Edition"

Millennials are the most interested in visiting, although Gen Zers and Gen Xers both saw significant increases in interest too.



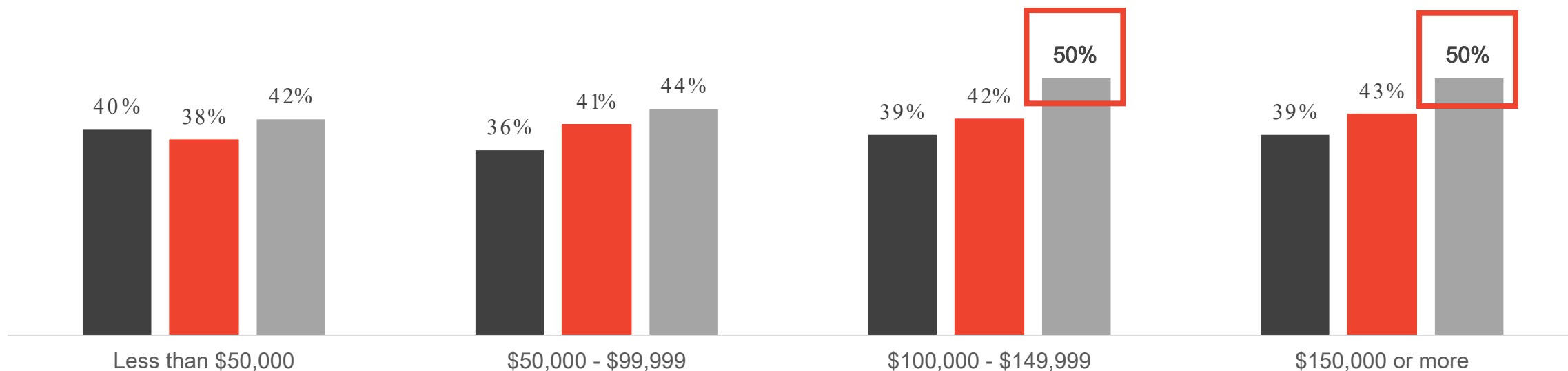
North Carolina Proprietary Questions

Data in bold indicates a significant difference from Summer 2024.
Base: U.S. Leisure Travelers (n=3,652)
Source: MMGY's 2025 *Portrait of American Travelers*® "Summer Edition"

Higher -income travelers (\$100K+) are the most interested in visiting North Carolina.

Interest in Visiting North Carolina By Household Income

■ 2023 ■ 2024 ■ 2025



Data in bold indicates a significant difference from Summer 2024.

Base: U.S. Leisure Travelers (n=3,652)

Source: MMGY's 2025 *Portrait of American Travelers*® "Summer Edition"

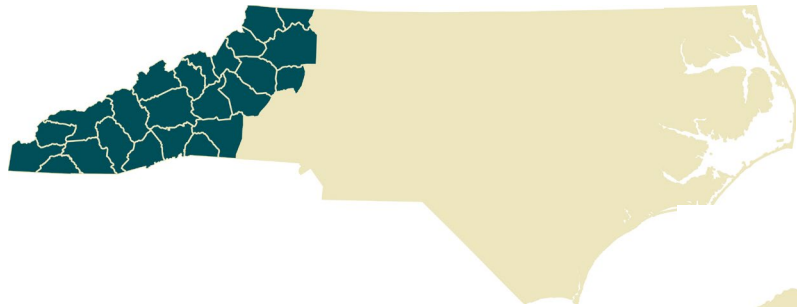
North Carolina Proprietary Questions

North Carolina Proprietary Questions



If you were to visit North Carolina in the next 12
which of the below regions would you visit?

-24 months,

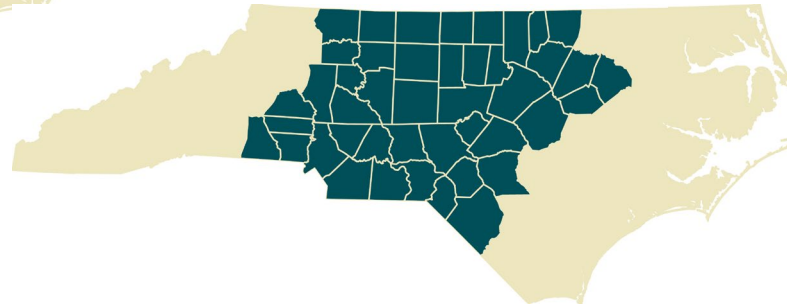


Mountains:

Prospects: 51%

U.S. leisure travelers: 43%

(Includes Asheville & the Foothills, High Country, Smoky Mountains & Cherokee)

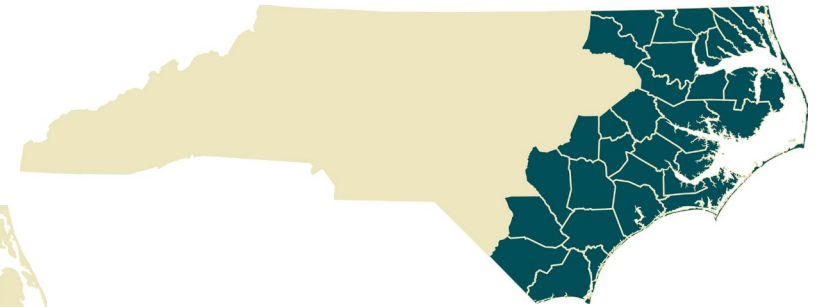


Piedmont:

Prospects: 44%

U.S. leisure travelers: 33%

(Includes Charlotte Region, Greensboro & Winston-Salem, Pinehurst & Sandhills, Raleigh, Durham & the Triangle)



Coast:

Prospects: 67%

U.S. leisure travelers: 55%

(Includes Albemarle & Pamlico Sounds, Brunswick Islands, Crystal Coast, Inner Coastal Plain, Outer Banks & Currituck, Topsail Area, Wilmington Area)

Data in bold indicates a significant difference from U.S. leisure travelers.

Base: U.S. Leisure Travelers (n=3,652) & North Carolina Prospect (n=1,703)

Source: MMGY's 2025 *Portrait of American Travelers*® "Summer Edition"

When traveling to North Carolina, what destination types are you most likely to consider?

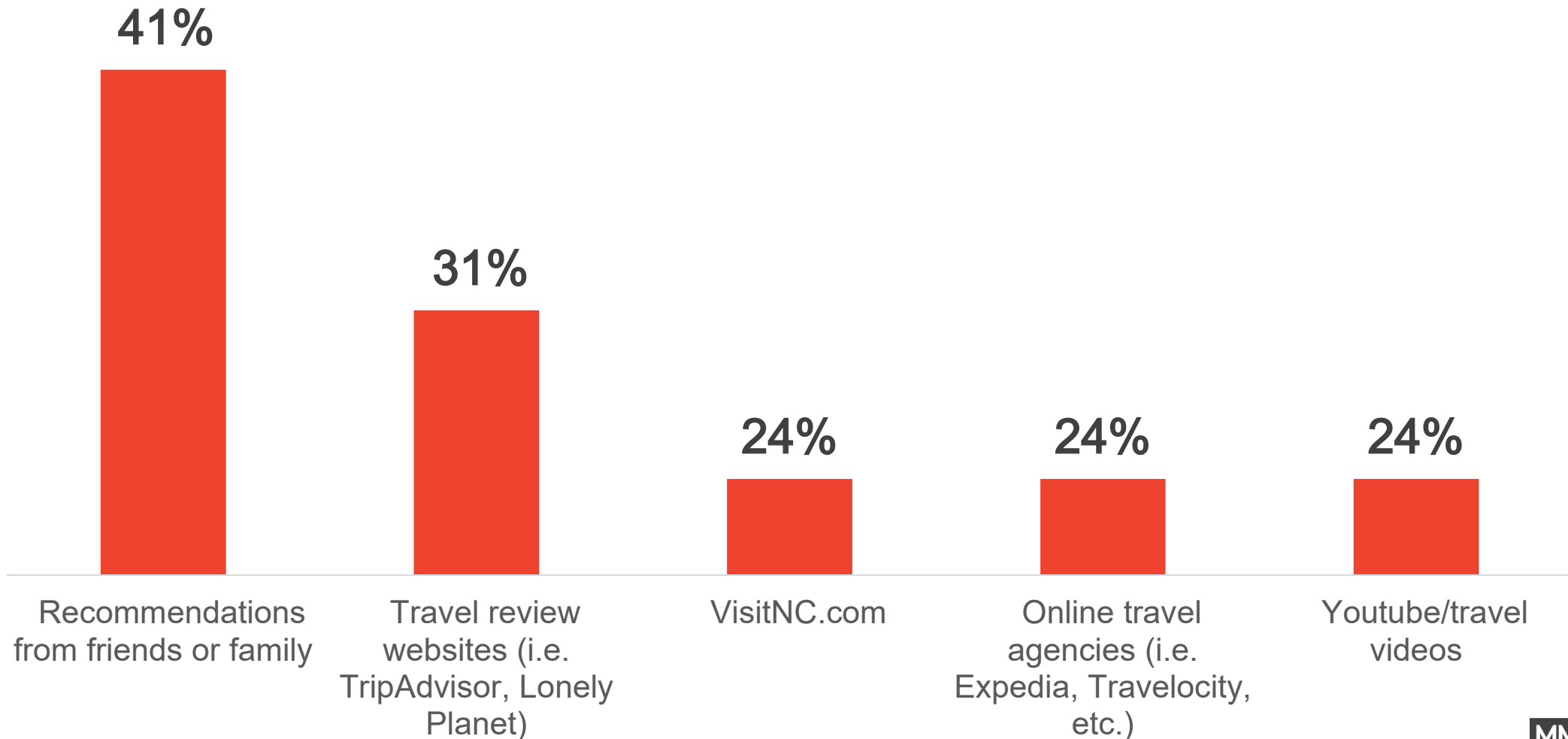
(By travel party composition)

Top two destination types for each travel party are in bold

Destination types	Alone	With significant other	Family vacation	With friends	Group tour
Beach vacations	36%	66%	59%	55%	38%
Historic attractions and museums	31%	45%	36%	35%	38%
Culinary experiences	24%	37%	19%	31%	27%
Outdoor activities and exploring nature	21%	35%	33%	34%	25%
Mountain Vacations	20%	33%	25%	26%	19%
Urban destinations	41%	33%	22%	36%	30%
Theme and water parks	10%	23%	41%	24%	18%

North Carolina Proprietary Questions

If planning a trip to North Carolina, which of the following sources would you use for travel inspiration?



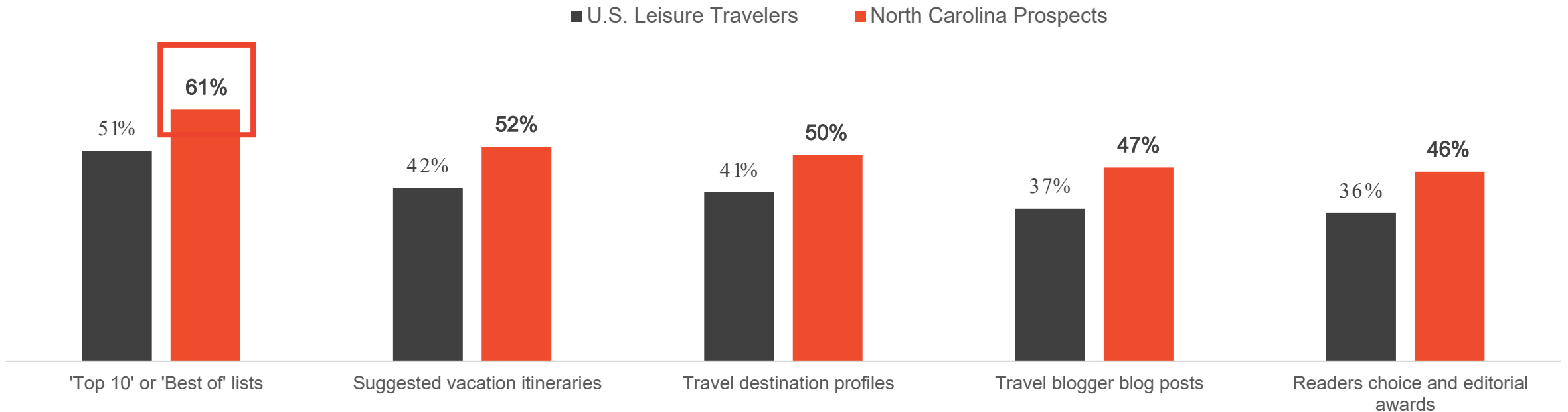
North Carolina Proprietary Questions

Base: North Carolina Prospect (n=1,703)

Source: MMGY's 2025 *Portrait of American Travelers*® "Summer Edition"

'Top 10' lists are the most influential travel media/news stories for ideas and inspiration.

How influential are each of the following travel media/news stories for travel ideas and inspiration?
(% rated 'extremely/very influential')



Data in bold indicates a significant difference from U.S. leisure travelers.

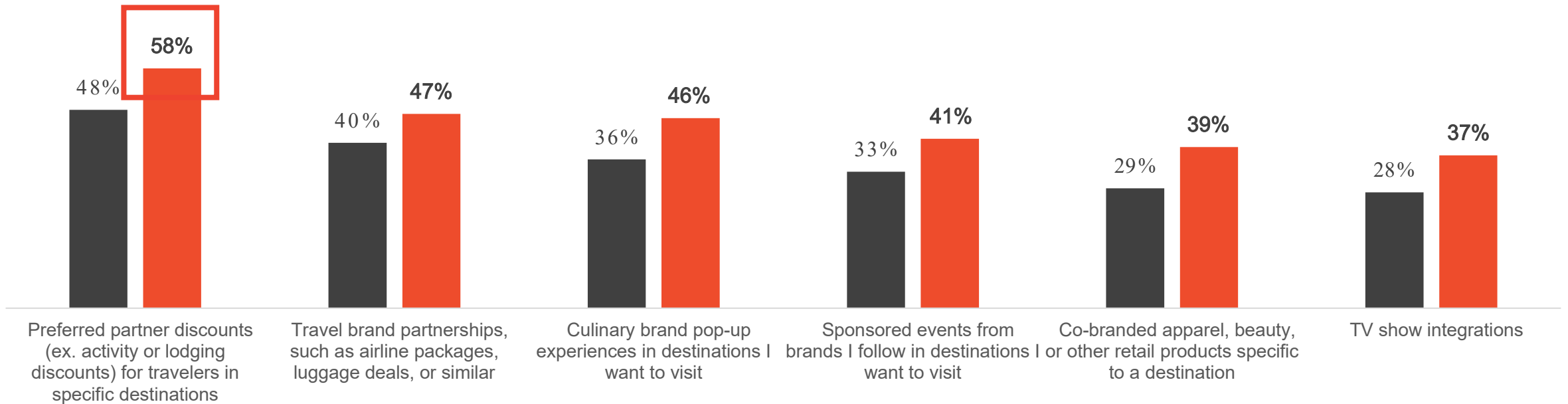
Base: U.S. Leisure Travelers (n=3,652) & North Carolina Prospect (n=1,703)

Source: MMGY's 2025 *Portrait of American Travelers®* "Summer Edition"

All types of brand partnerships are significantly more appealing to prospects than U.S. leisure travelers.

How influential are each of the following brand partnerships for travel ideas and inspiration?
(% rated 'extremely/very influential')

■ U.S. Leisure Travelers ■ North Carolina Prospects



Data in bold indicates a significant difference from U.S. leisure travelers.

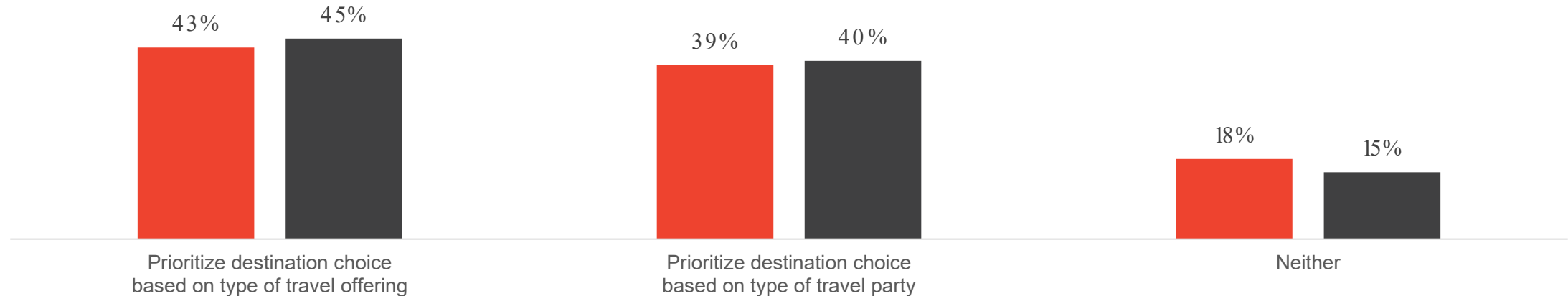
Base: U.S. Leisure Travelers (n=3,652) & North Carolina Prospect (n=1,703)

Source: MMGY's 2025 *Portrait of American Travelers*® "Summer Edition"

Most North Carolina prospects prioritize their destination choice based on the type of travel offering.

Do you prioritize destinations based on your travel party or the travel offering?

■ Summer 2024 ■ Summer 2025



Data in bold indicates a significant difference from U.S. leisure travelers.

Base: U.S. Leisure Travelers (n=3,652) & North Carolina Prospect (n=1,703)

Source: MMGY's 2025 *Portrait of American Travelers®* "Summer Edition"

Key Insights

North Carolina Proprietary Questions

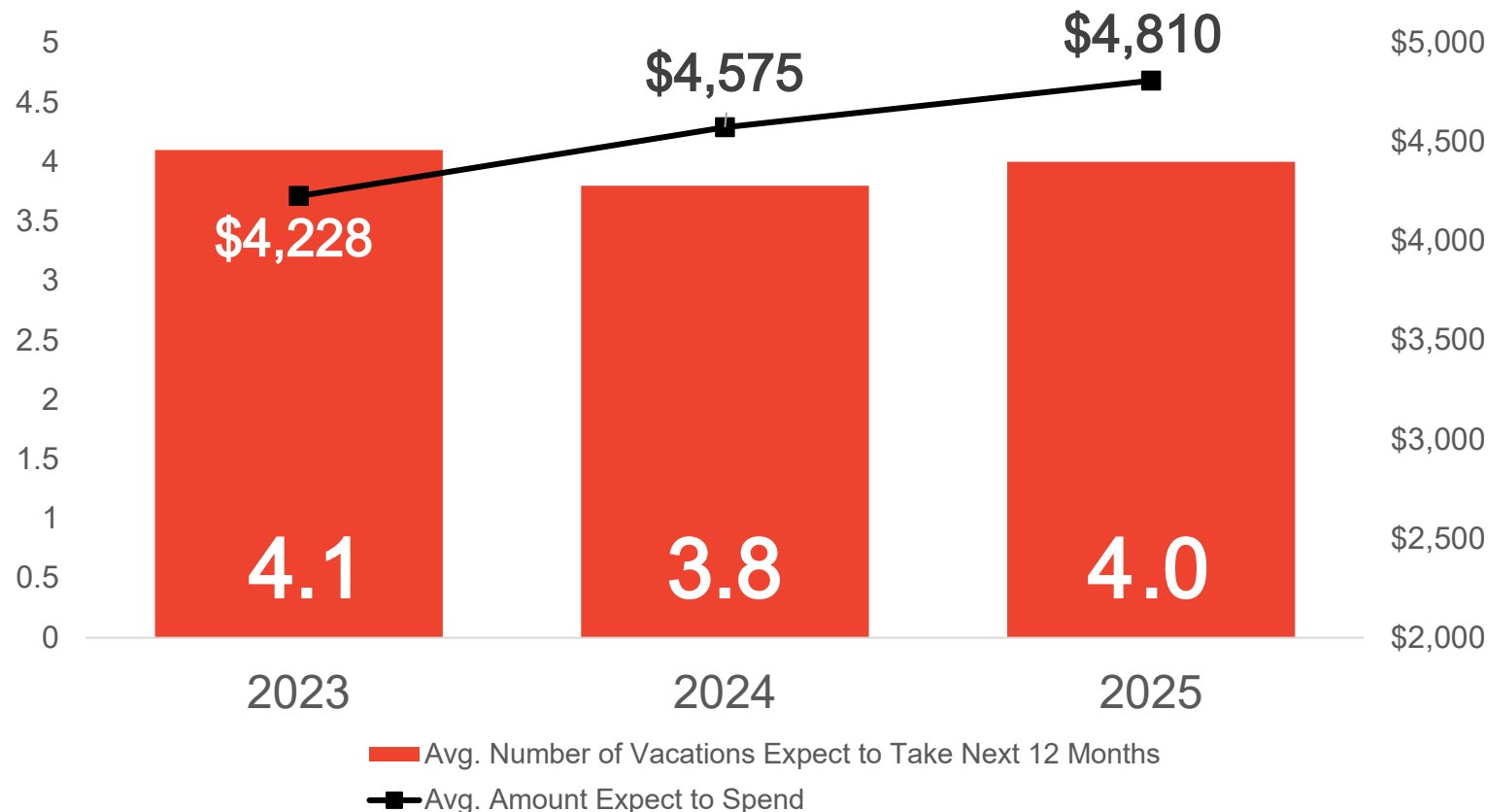
- Interest in visiting North Carolina has increased significantly **across all demographics** compared to the previous two years.
- **Beach vacations** were the only destination type that appeared in the top two selections for all travel parties, showcasing their universal appeal.
- Travel media/news stories **featuring 'Top 10' lists and preferred partner discounts**, are effective ways to drive interest among prospects. Brand partnerships which offer deals or discounts will work especially well following **tightening economic conditions**.



Travel Outlook Snapshot

North Carolina prospects are planning to spend more and take more vacations in the next 12 months.

Prospects Leisure Travel and Spending/Next 12 Months



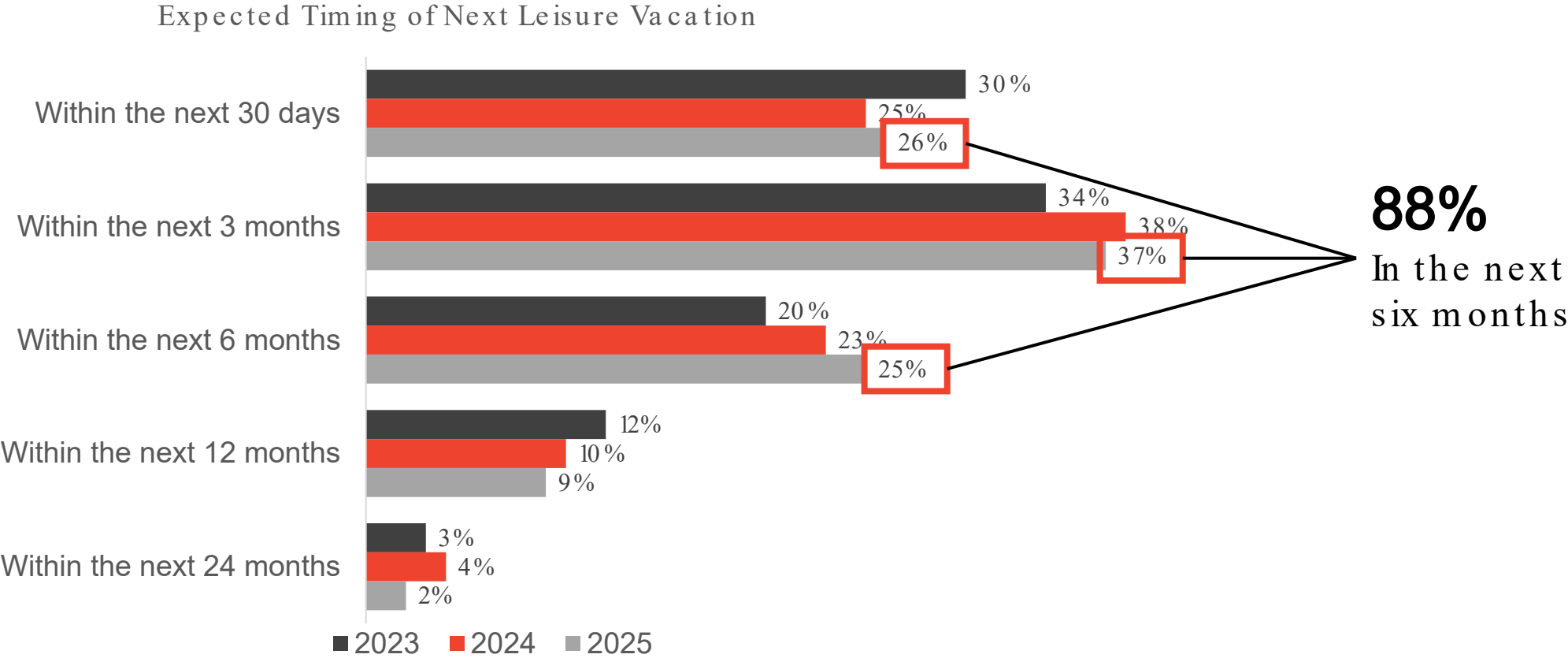
/ In contrast to the average U.S. leisure traveler, the expected spending (\$4,810 vs. \$4,699) and number of vacations (4.0 vs. 3.85) in the next 12 months has risen for prospects.

Traveler Intentions: Over Time

Base: Interested in Visiting North Carolina & Planning to Take a Trip in the Next 12 Months (n=1,393)

Source: MMGY's 2025 *Portrait of American Travelers*® "Summer Edition"

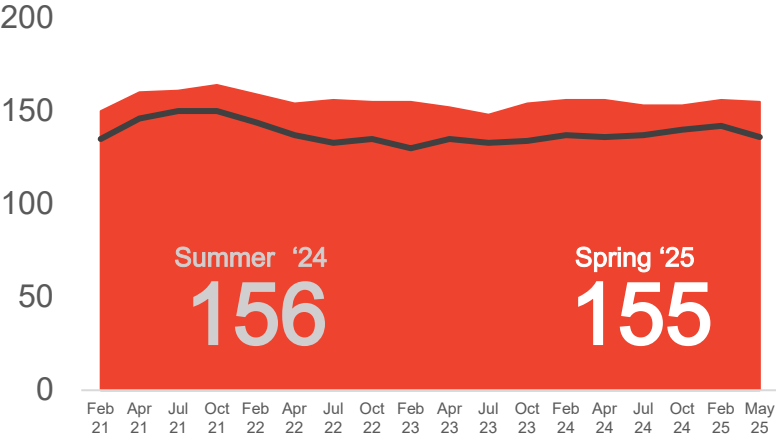
Nine in 10 (88%) prospects are planning to take their next leisure vacation within the next six months.



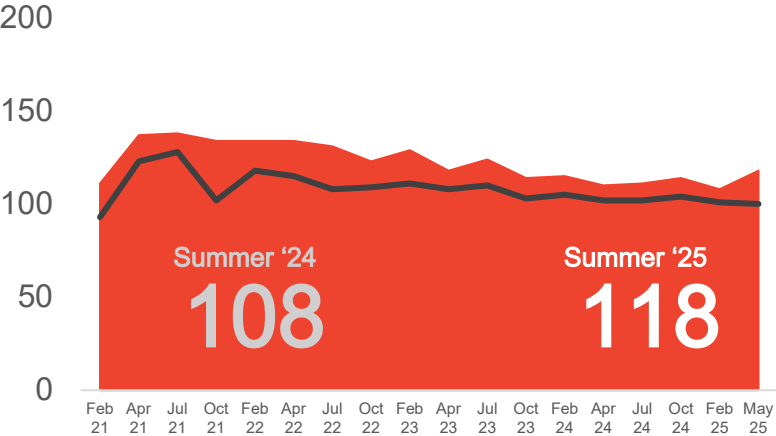
Traveler Intentions: Over Time

North Carolina prospects have a much more positive travel outlook overall compared to Summer 2024.

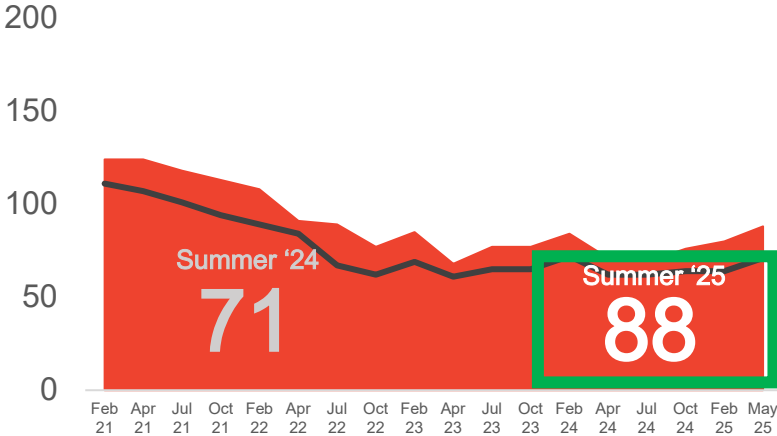
Interest in Travel



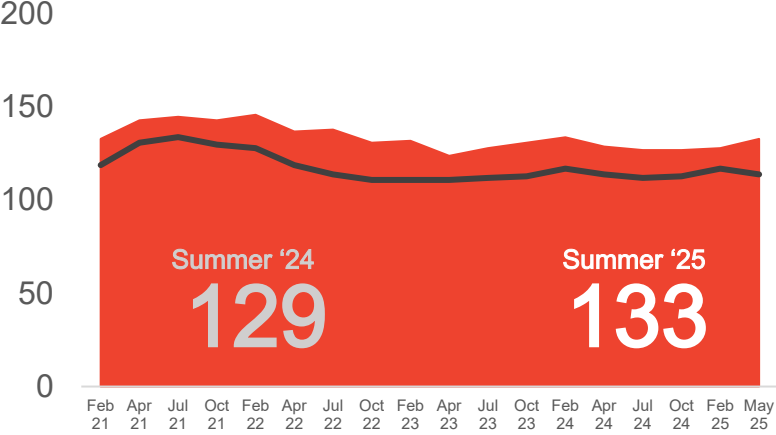
Perceived Safety of Travel



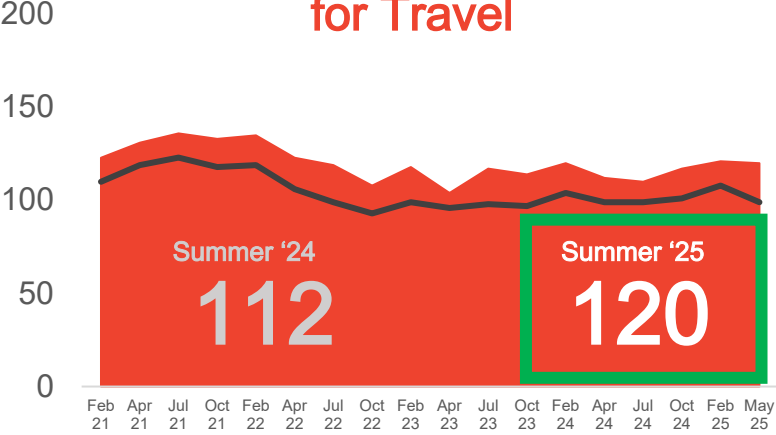
Affordability of Travel



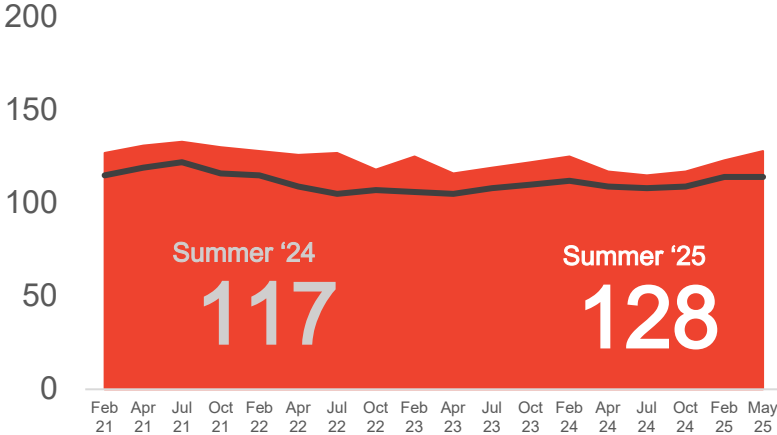
Time Available for Travel



Personal Finances Available for Travel



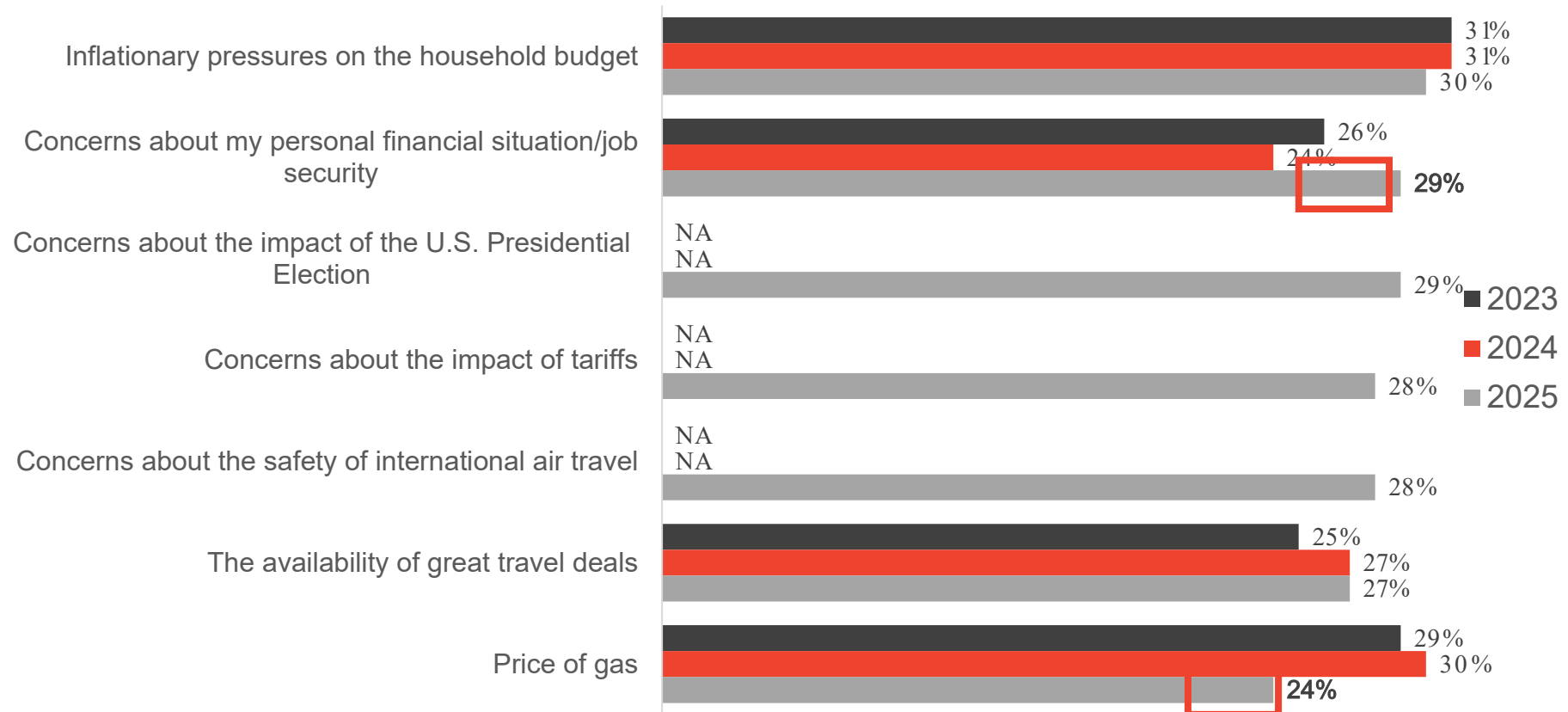
Quality of Service of Travel



Traveler Sentiment Index™

Inflationary pressures are continuing to have the biggest impact on prospects, while concerns about personal financial situations/job security are growing.

% Who Are Extremely Impacted By...



NA = Not asked.

Data in bold indicates a significant difference from Summer 2024.

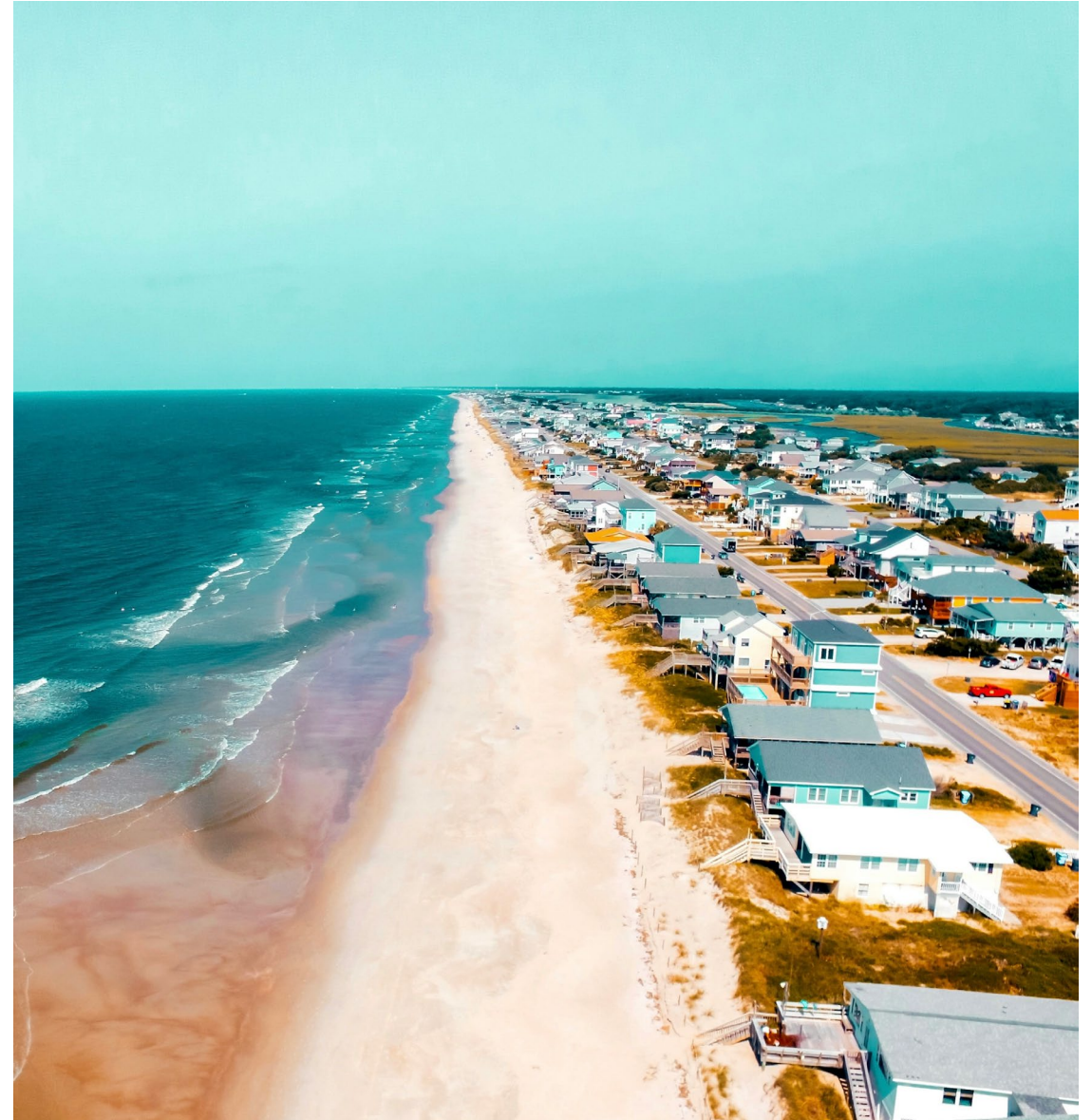
Base: North Carolina Prospect (n=1,703)

Source: MMGY's 2025 *Portrait of American Travelers®* "Summer Edition"

Key Insights

Traveler Outlook

- Prospects are planning to spend **\$4,810** (vs. \$4,575 in 2024) on vacations in the next 12 months and take **4.0 trips** (vs. 3.8) over the same period.
- The U.S. leisure traveler is planning to **reduce** their spending and number of vacations compared to 2024.
- Personal financial concerns, the impact of tariffs and inflationary pressures continue to impact prospects.
- On a more **positive** note, the impact of the price of gas has been significantly reduced on prospects' travel plans.





Where People Want to Visit

Florida, Hawaii, South Carolina, and Colorado are the other top states of interest among North Carolina prospects.

Top 5 States of Interest <i>Among Prospects</i>	2023	2024	2025
Florida	70 %	73%	75%
Ha wa ii	73%	71%	75%
South Carolina	72%	67%	69%
Colora do	67%	67%	67%
New York	62%	63%	65%

North Carolina Interest:
U.S. Respondents = **38%**
Prospects = **100%**

Destinations of Interest

Charlotte and Outer Banks are consistently the top two North Carolina destinations for prospects.

Top Destinations of Interest <i>Among Prospects</i>	2023	2024	2025
Florida Keys/Key West, FL	70%	68%	69%
Maui, HI	66%	66%	68%
Island of Hawai'i	69%	66%	67%
Honolulu, HI	66%	64%	66^
Hilton Head Island	59%	63%	64%

Destinations of Interest

Summer Module

Road
Trips



Road trips are hugely popular among prospects.

63% USLT 68% PROSPECT

of North Carolina Prospects have taken a road trip during the **past 12 months**

70% USLT 73% PROSPECT

of North Carolina Prospects intend to take a road trip during the **next 12 months**

Base: North Carolina Prospect (n=1,703)

Source: MMGY's 2025 *Portrait of American Travelers*® "Summer Edition"



Motivation For Past or Future Road Trips

	2023	2024	2025
Ability to explore multiple places on a single trip	45%	50%	49%
Ability to be spontaneous while traveling	49%	50%	48%
Ability to pack everything needed for vacation in the car	43%	44%	38%
Thrill of making discoveries on the road	38%	41%	38%
Lower vacation costs	42%	34%	33%
Ability to take vacation at the last minute	28%	33%	33%
Nostalgia for past road trip vacations	26%	26%	27%
Ease in taking pets along	16%	21%	14%
None of the above	4%	6%	4%

/ Being able to explore multiple places and be spontaneous while traveling are the biggest motivators for road trips among North Carolina prospects.

Road Trips

Data in bold indicates a significant difference from Summer 2024.

Base: Taken or Plan to take a road trip & North Carolina Prospect (n=1,411)

Source: MMGY's 2025 *Portrait of American Travelers*® "Summer Edition"

North Carolina prospects are planning to travel further and visit more places on their road trips than U.S. leisure travelers.

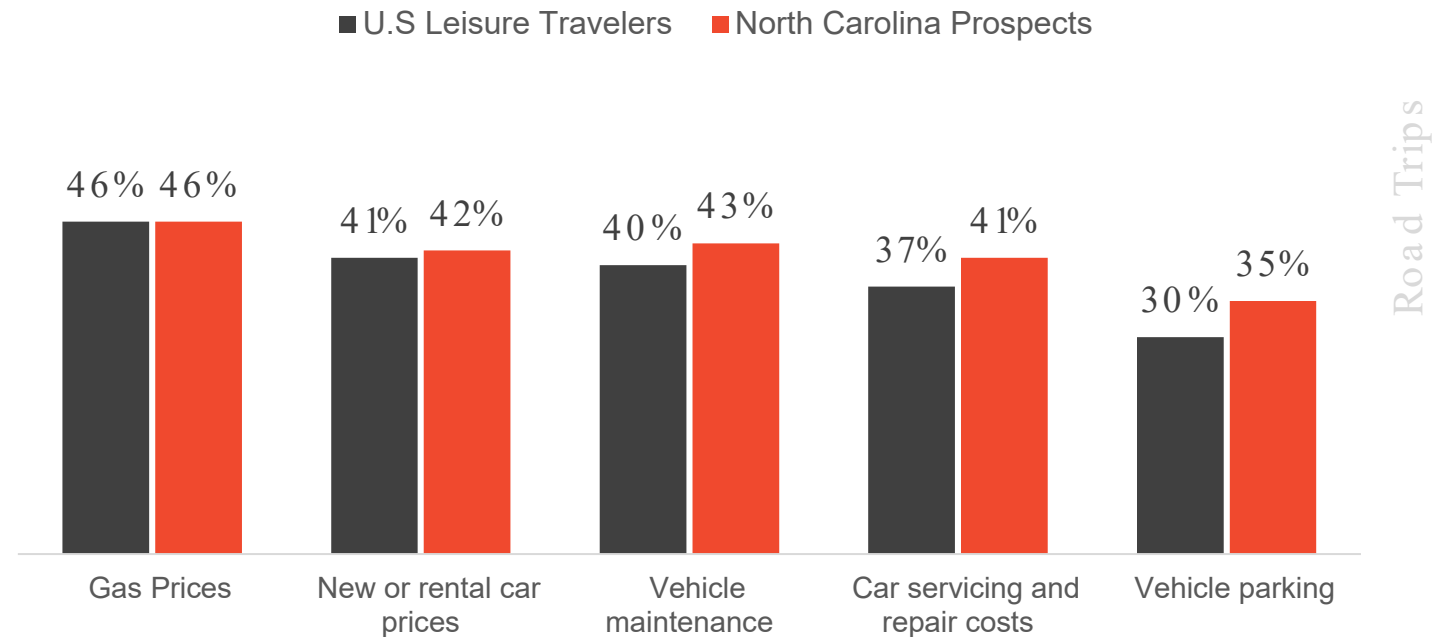
3.4

Average number of cities/places North Carolina Prospects intend to visit on their next road trip
(vs. 3.2 among U.S. Leisure Travelers)

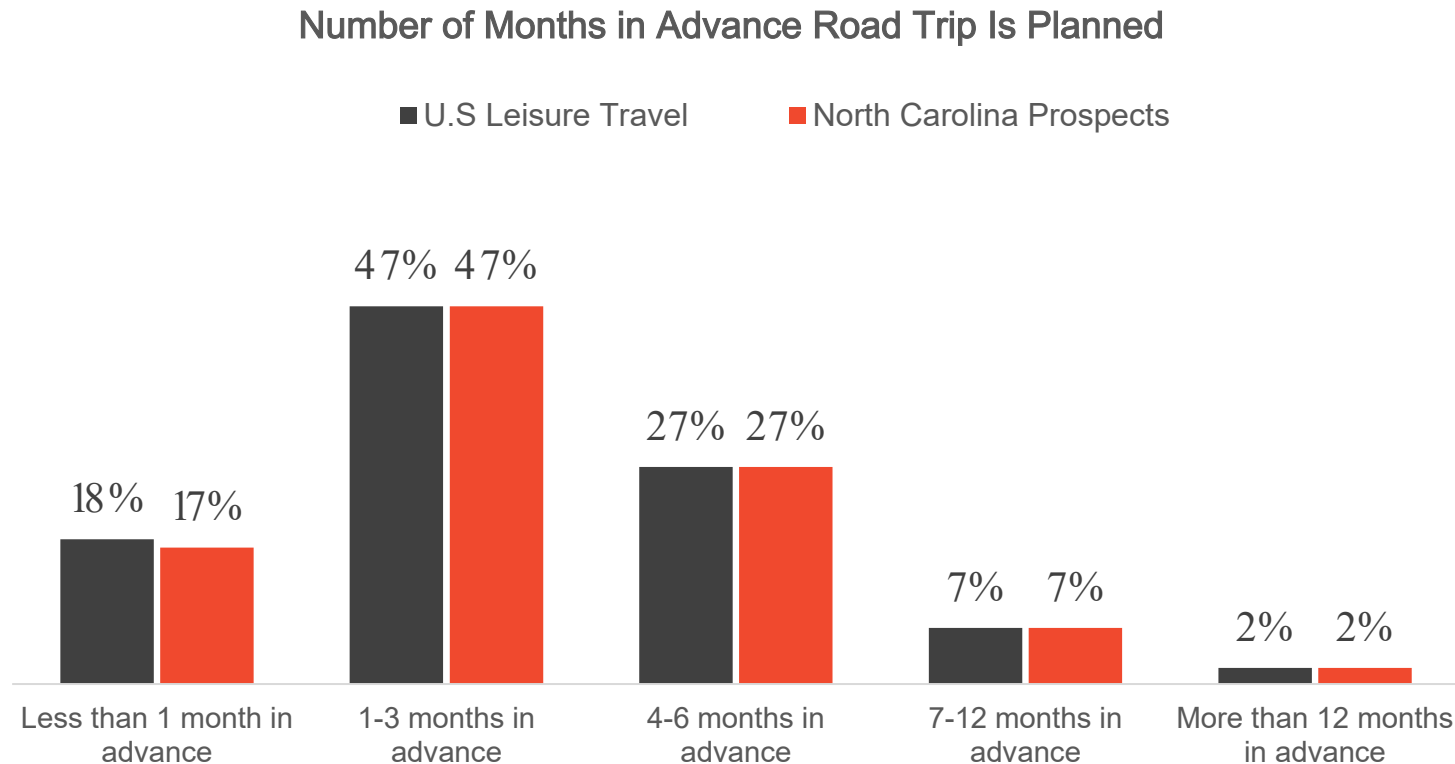
1,005

Average number of miles North Carolina Prospects are willing to drive on their next road trip
(vs. 980 among U.S. Leisure Travelers)

What road trip costs will be impacted by tariffs?



The Blue Ridge Parkway is the most popular road trip route for prospects in the next 12 months.



Most popular road trip routes: (next 12 months)

1. Blue Ridge Parkway (25%)
2. The Texas Hill Country (19%)
3. Pacific Coast Highway (17%)
4. Overseas Highway (17%)
5. Route 66 (16%)

Key Insights

Road Trips

- Intent to take a road trip remains high among prospects in Summer 2025, with 73% of prospects planning to take a road trip in the next 12 months.
- Exploring multiple places and being spontaneous are the primary pull factors for these travelers.
- Compared to the U.S. leisure traveler, they feel that the overall impact of tariffs on road trip costs will be larger



Summer Module

Family Travel



Over 4 in 10 (43%) prospects are planning to travel with their children during the next 12 months.

38% 2024 43% 2025

of North Carolina Prospects plan to travel with children under 18 during the next 12 months

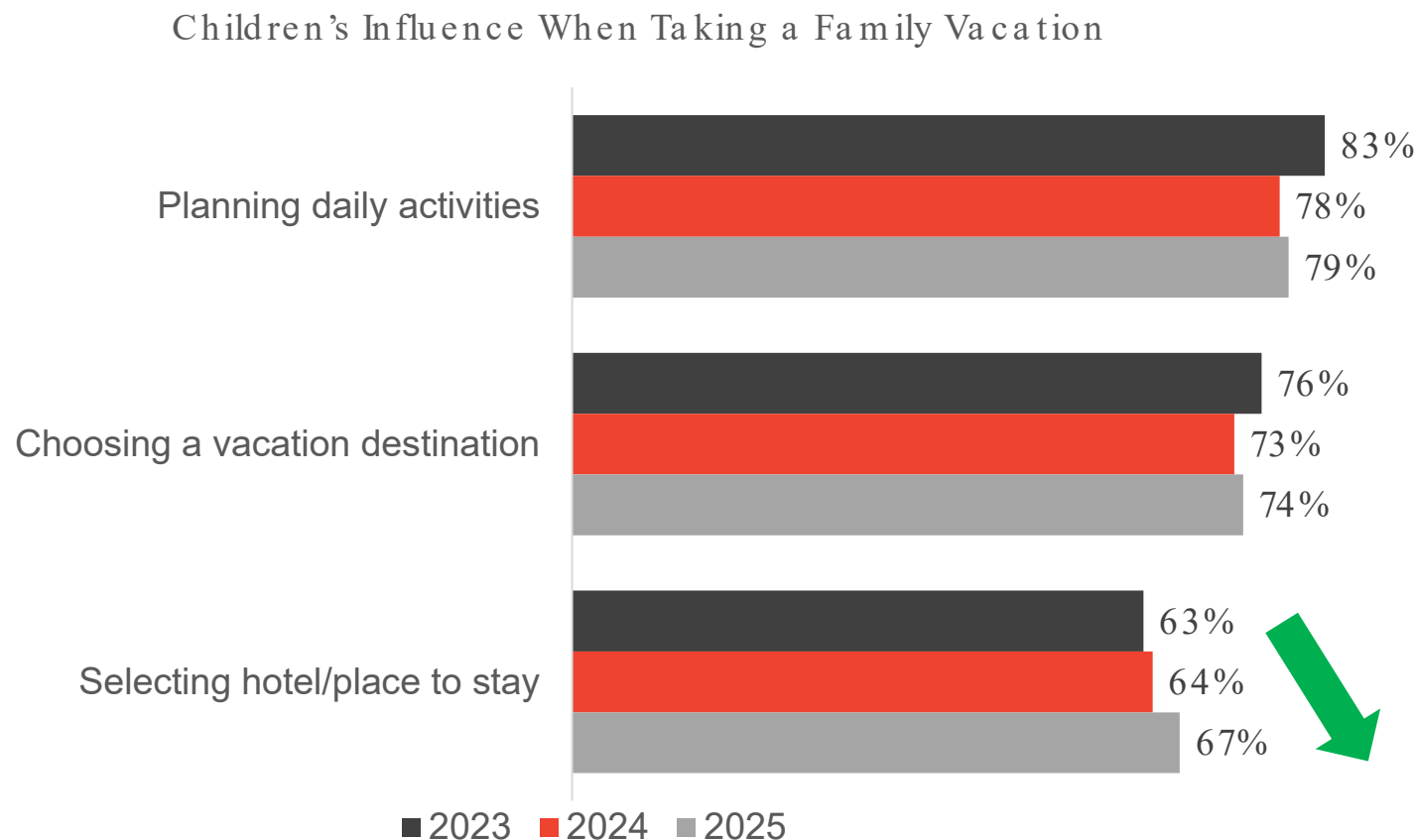
37% plan to travel with three or more generations of their family in the next 12 months

Base: North Carolina Prospect (n=1,703)

Source: MMGY's 2025 *Portrait of American Travelers*® "Summer Edition"



Children's role in travel is highly significant for prospects, with more children having an influence in selecting a hotel/place to stay than anytime in the past 3 years.



Traveling For Children's Events/Activities

66%

U.S. Leisure Traveler

74%

North Carolina Prospect

of North Carolina Prospects
(who have children) plan to
travel for their children to
participate in activities.

Type of Activity*	USLT	North Carolina
Sporting events	33%	37%
Performing arts and music events	24%	28%
Cultural and heritage events	22%	27%
Summer Camp	23%	26%
Talent shows	20%	25%
Academic competition/camp	16%	19%
College preparatory events	15%	17%

* Among those who plan to travel for their children to participate in a sporting event
Base: Have children & North Carolina Prospect (n=770)
Source: MMGY's 2025 *Portrait of American Travelers®* "Summer Edition"

Key Insights

Family Travel

- Children continue to be highly influential in travel decisions for prospects, with almost 8 in 10 (79%) who have children stating they are influential in planning daily activities.
- Additionally, 74% of prospects who have children plan to travel for their events/activities, most commonly for their sporting events, or performing arts and music events.
- A significant 37% of prospects are also planning to travel with three or more generations of their family in the next 12 months.



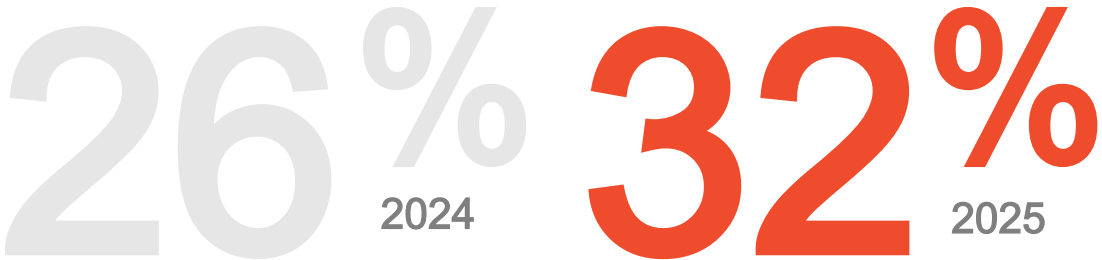


Summer Module

Travel Advisors



More prospects are using travel advisors compared to previous years.



of those interested in visiting North Carolina have used the services of a travel advisor during the past 2 years



of those interested in Visiting North Carolina plan to use the services of a travel advisor during the next 2 years

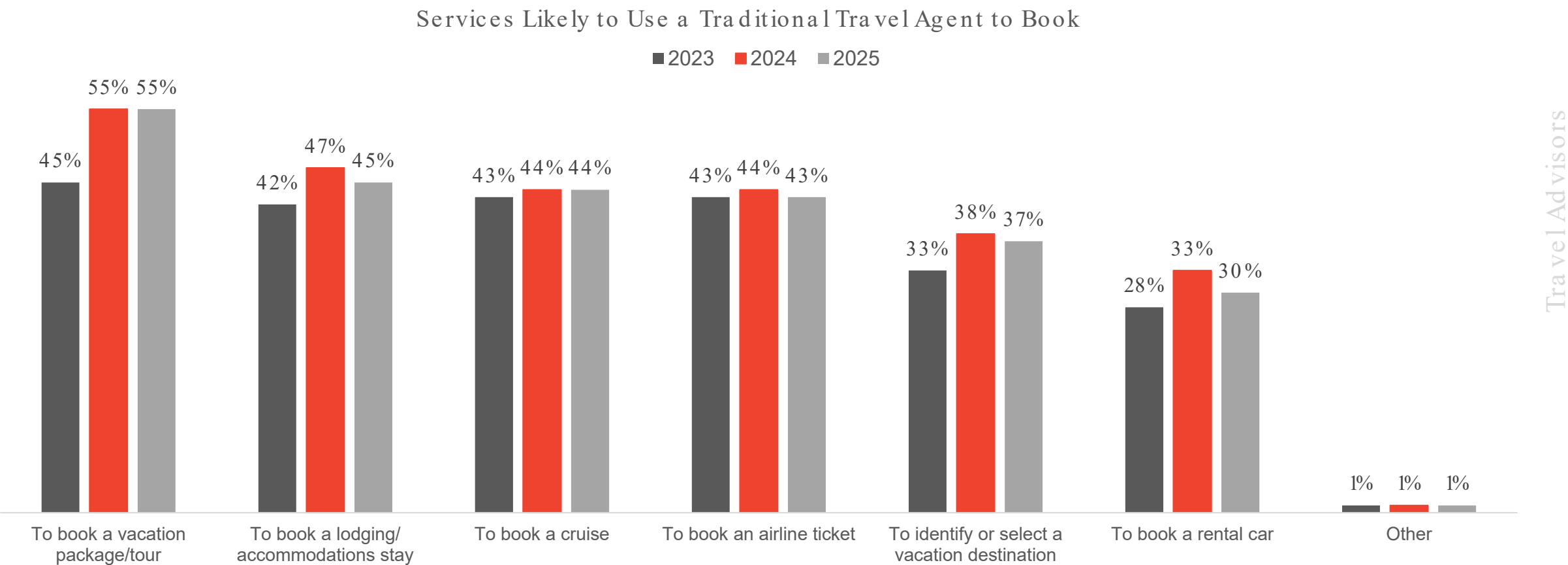


Increasing use of travel agents among prospects is driven by a desire to get the best prices for a vacation, assistance with complex arrangements and a desire for peace of mind when booking travel.

Reasons to Use a Traditional Travel Agent	2023	2024	2025
To get the best prices for a vacation	56%	48%	42%
For assistance with complex travel arrangements	NA	NA	42%
To have peace of mind that what I'm booking is the experience I expect it will be	42%	46%	42%
They provide help if things go wrong	43%	40%	39%
To take the time and hassle out of researching and booking travel	43%	46%	37%
To gain access to experiences I can't get on my own	35%	44%	36%
To get recommendations on the hottest/trending places to visit	27%	42%	33%
To get tailored itineraries for specific occasions, preferences or needs	NA	NA	33%
Other	5%	5%	1%

Data in bold indicates a significant difference from Summer 2024.

Travel advisors are most used to book a vacation package/tour and lodgings/accommodations.

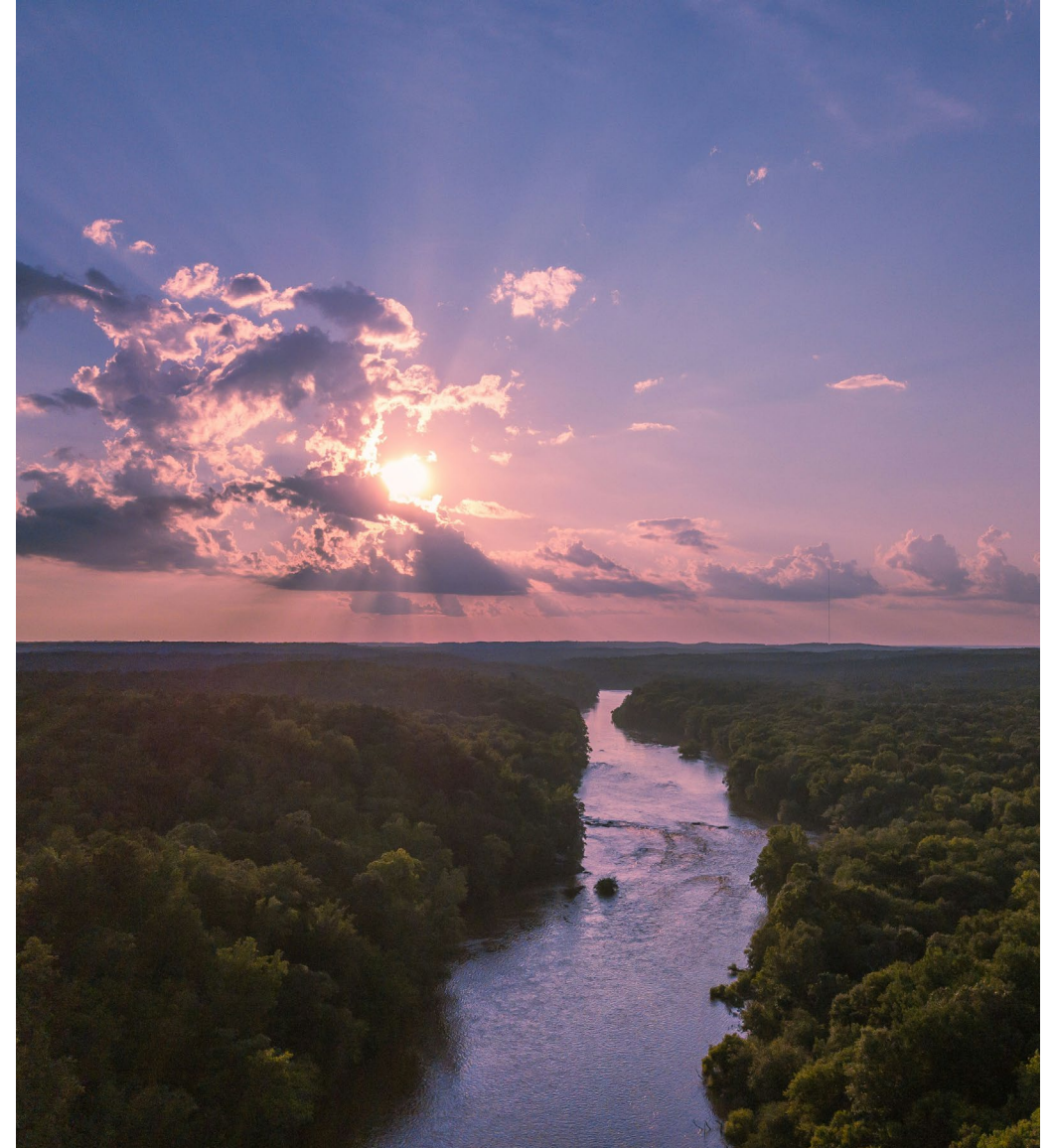


Data in bold indicates a significant difference from Summer 2024.
Base: Plan to use a traditional travel agent & Interested in Visiting North Carolina (n=728)
Source: MMGY's 2025 *Portrait of American Travelers* ® "Summer Edition"

Key Insights

Travel Advisors

- The number of prospects who have both used a traditional travel agent in the past 2 years, and who plan to use their services in the next 2 years has increased significantly from Summer 2025.
- These travelers are most likely to use their services for lower prices, assistance with complex arrangements and for peace of mind when booking vacations.
- AI should be increasingly used as a tool by travel advisors help support these important professional services.

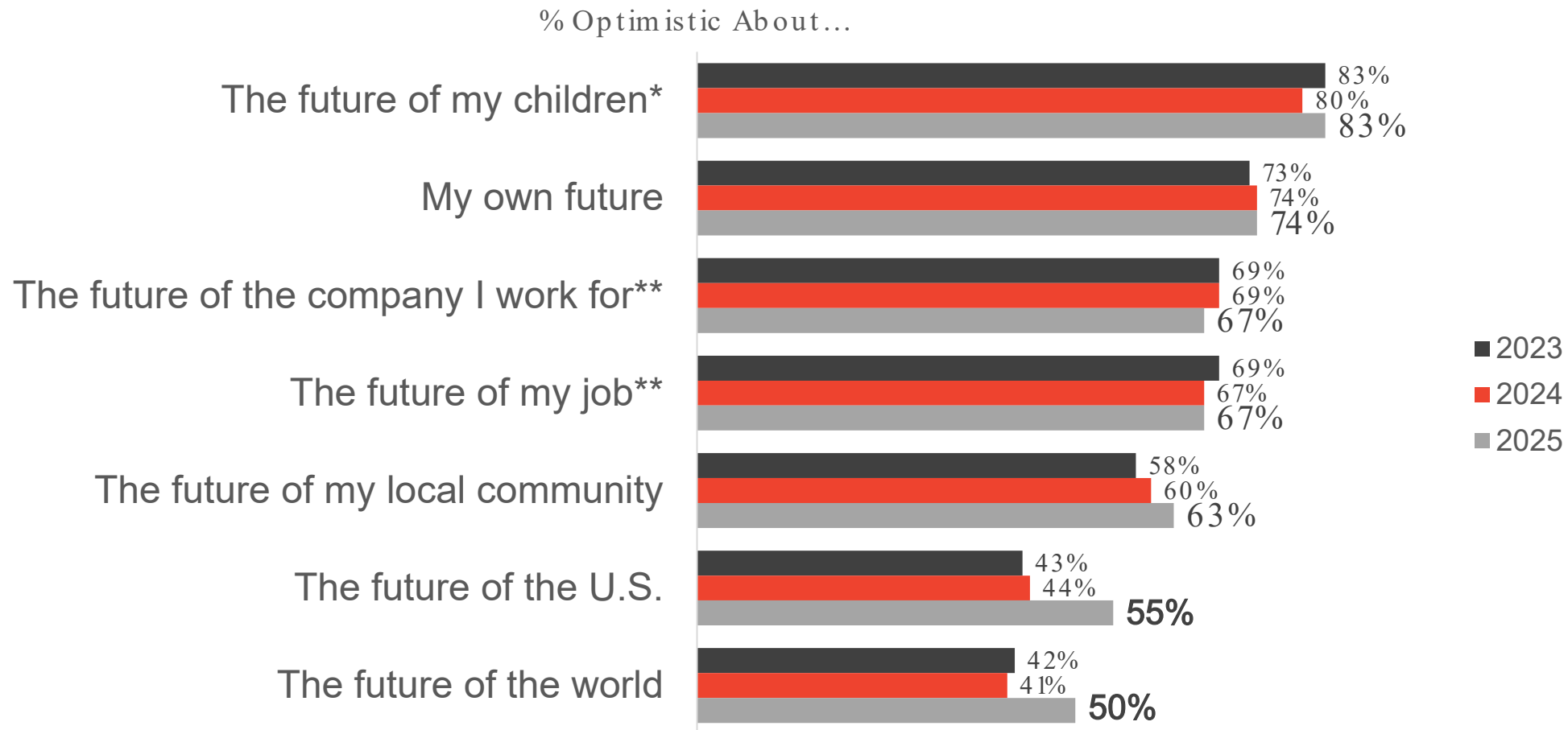


Summer Module

Traveler Perspectives



Significantly more prospects are optimistic about the future of the U.S. and the world compared to Summer 2023 and Summer 2024.

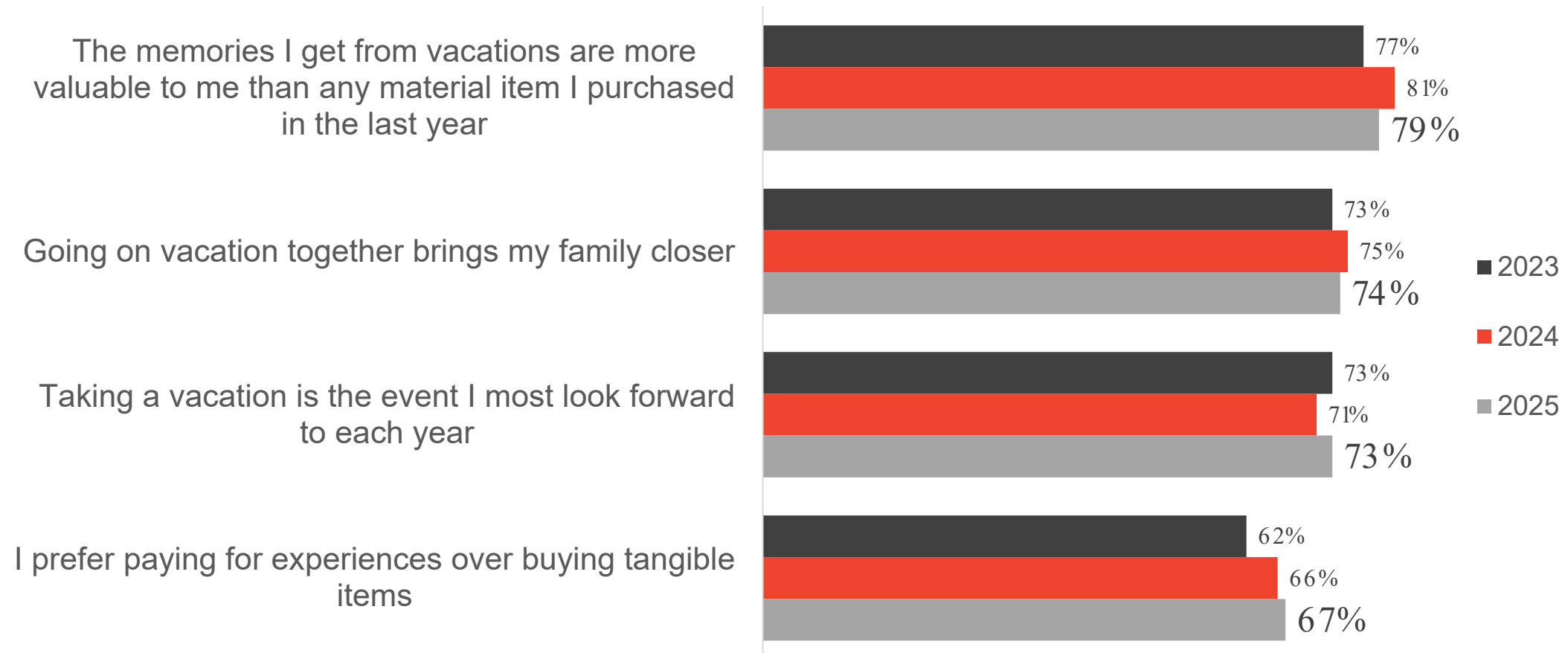


Traveler Perspectives

* Among those with children
** Among those who are employed
Data in bold indicates a significant difference from Summer 2024.
Base: North Carolina Prospect (n=1,703)
Source: MMGY's 2025 *Portrait of American Travelers®* "Summer Edition"

Making memories and bringing their family closer together are the primary vacation motivators for prospects.

% Agree with Statements



Traveler Perspectives

Data in bold indicates a significant difference from Summer 2024.

Base: North Carolina Prospect (n=1,703)

Source: MMGY's 2025 *Portrait of American Travelers®* "Summer Edition"

Luxury Travel

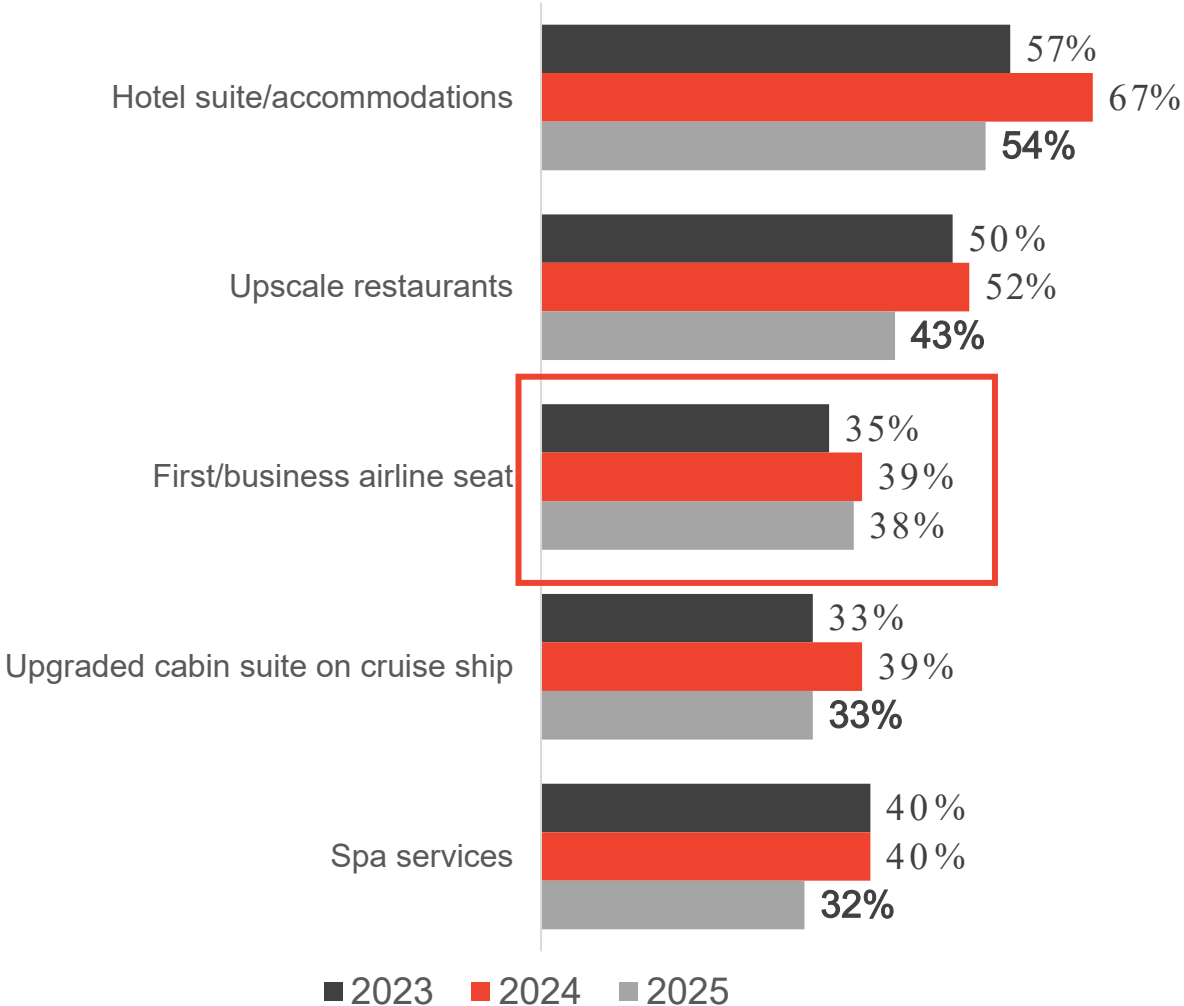
58%
2025

Agree: I enjoy being treated like a VIP.
(vs. 54% USLT)

37%
2025

Agree: I consider myself to be a luxury traveler.
(vs. 33% USLT)

Top Luxury Travel Features Willing To Pay More For
(Among those who consider themselves luxury travelers)



Traveler Perspectives

Data in bold indicates a significant difference from Summer 2024.

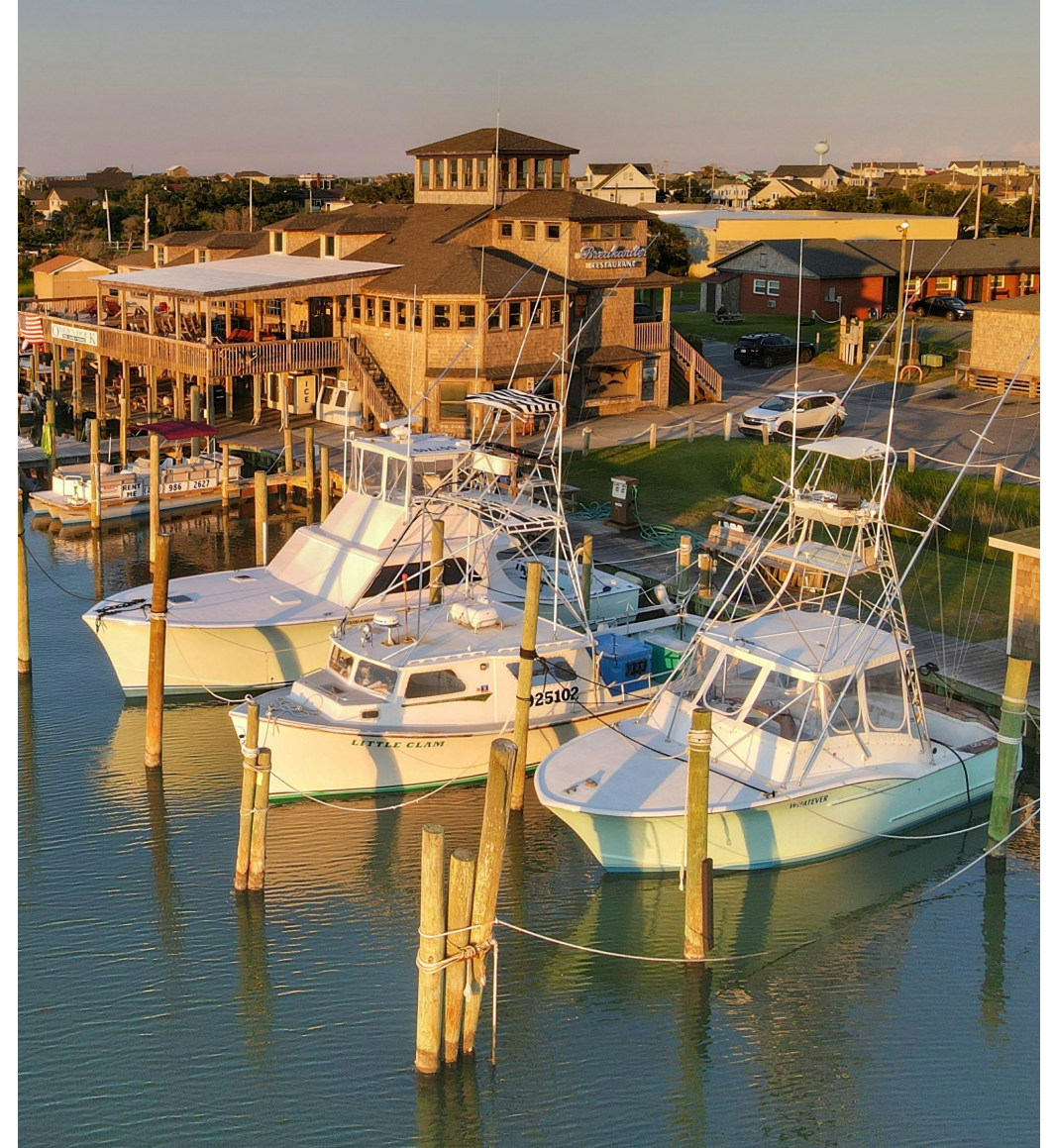
Base: North Carolina Prospect (n=1,703)

Source: MMGY's 2025 *Portrait of American Travelers*® "Summer Edition"

Key Insights

Traveler Perspectives

- Prospects have an overall optimistic outlook, with a significant increase in optimism in the future of the U.S. and the world compared to the previous two years.
- Making memories and bringing their family closer together are the biggest travel motivators for these travelers, highlighting how important vacations are as a medium for priceless experiences with family.
- Furthermore, almost 6 in 10 (58%) prospects enjoy being treated like a VIP and the luxury experiences they are most willing to pay for are hotel suites or upscale restaurants.



A vintage photograph of a lake with mountains in the background and people in a canoe. The scene is set on a calm body of water, likely a reservoir or a large lake, with a range of rugged, snow-capped mountains in the distance. The sky is filled with soft, white clouds. In the foreground, a small wooden canoe with two people inside is visible. One person is leaning over the side of the canoe, and the other is sitting. A small, light-colored object, possibly a surfboard or a small boat, is floating in the water to the left of the canoe. The overall tone of the image is nostalgic and serene.

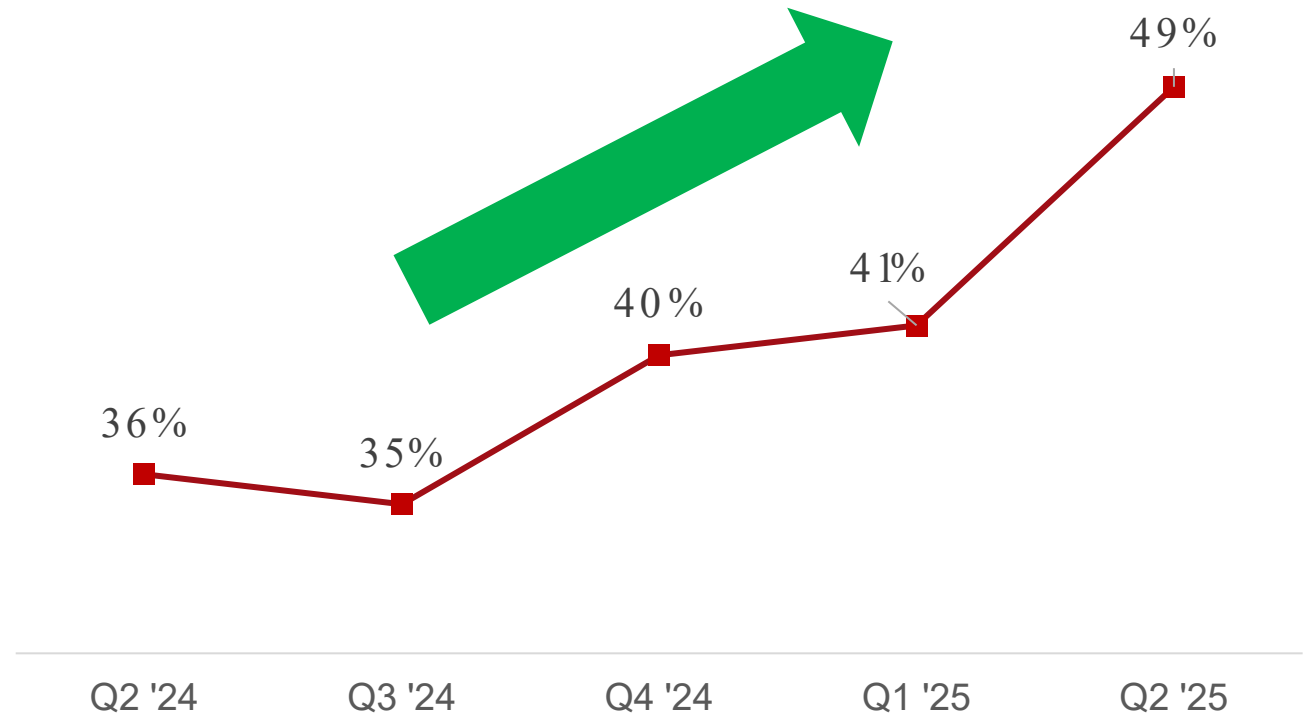
Vacation Motivators and Activities

Almost half of all prospects are now using AI tools for their travel planning.

49%

of North Carolina Prospects have used ChatGPT or another AI tool for travel planning.
(Compared to **42%** of **U.S. leisure travelers**)

AI Usage for Travel Planning Over Time
(Among North Carolina prospects)



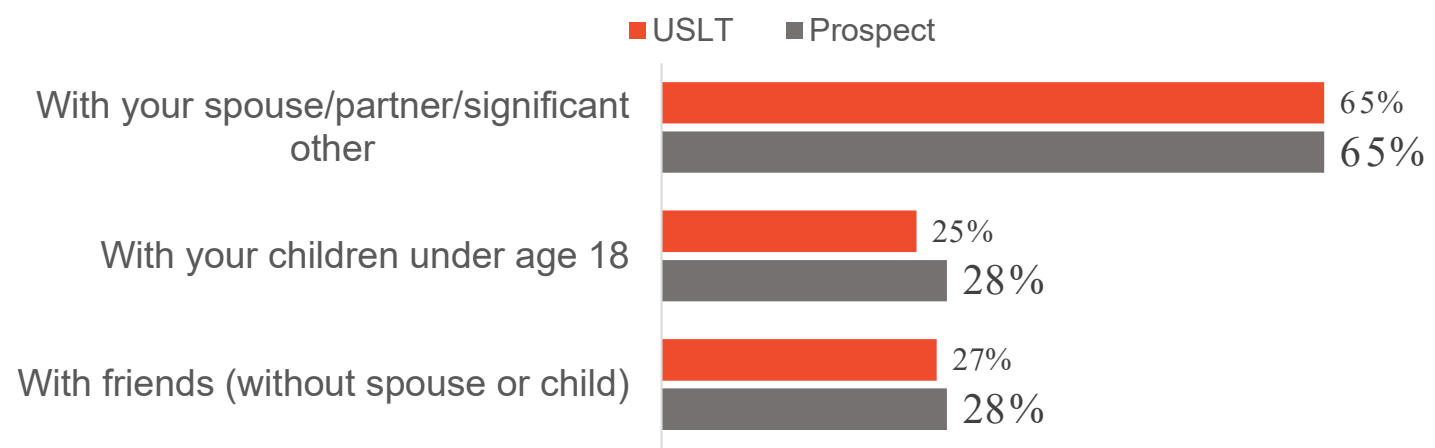
Base: North Carolina Prospects (n=1,703); those who have used ChatGPT or another AI tool for travel planning (n=813)

Source: MMGY's 2025 *Portrait of American Travelers* ® "Summer Edition"



Prospects are most likely to be traveling with their spouse/partner.

Travel Party During the Next Six Months



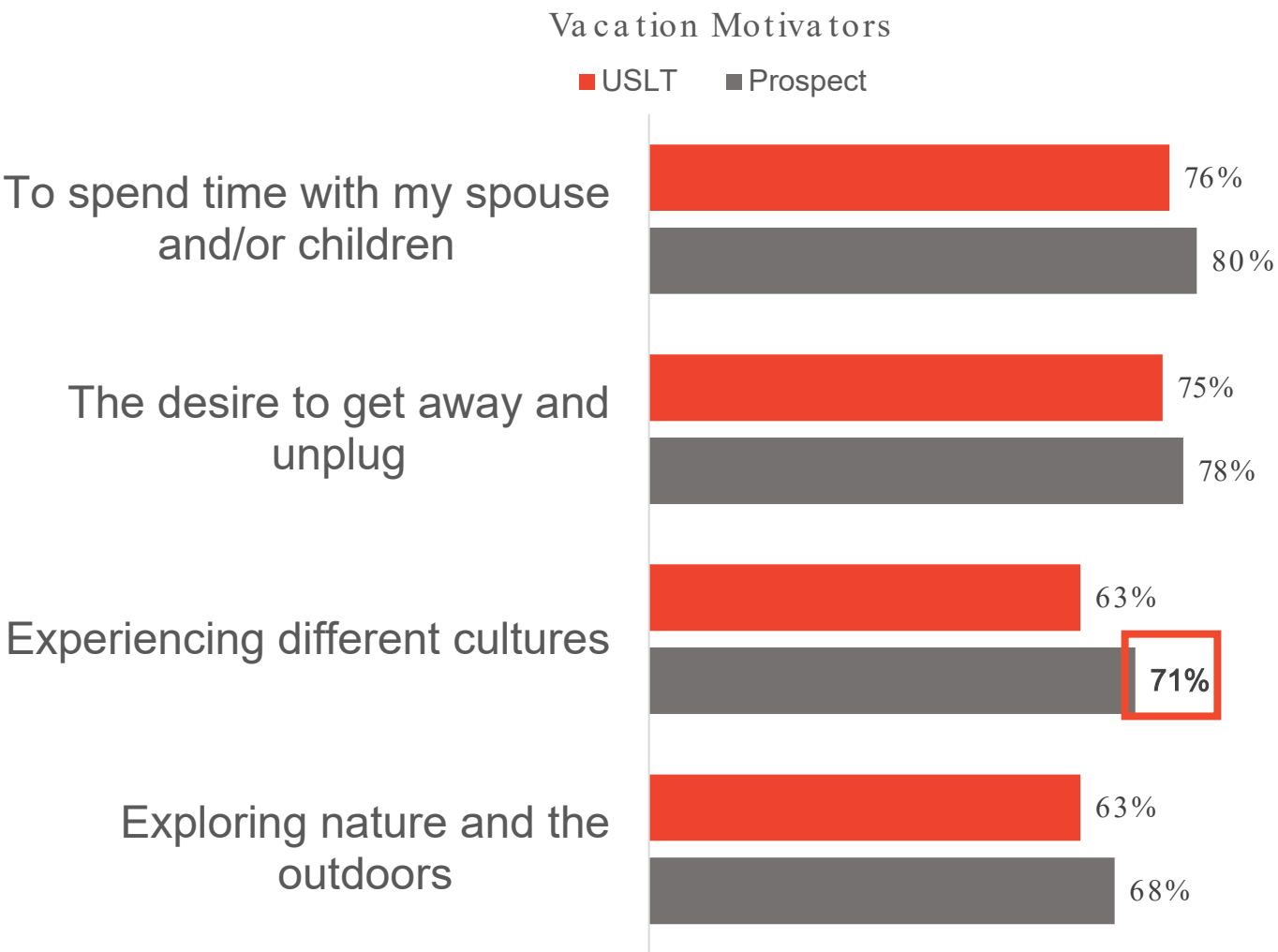
Top Travel Expectations in the Next 6 Months



Base: North Carolina Prospect who intend to travel during the next six months (n=1,528)
Source: MMGY's 2025 *Portrait of American Travelers* ® "Summer Edition"



Experiencing different cultures is significantly more important to prospects in 2025.

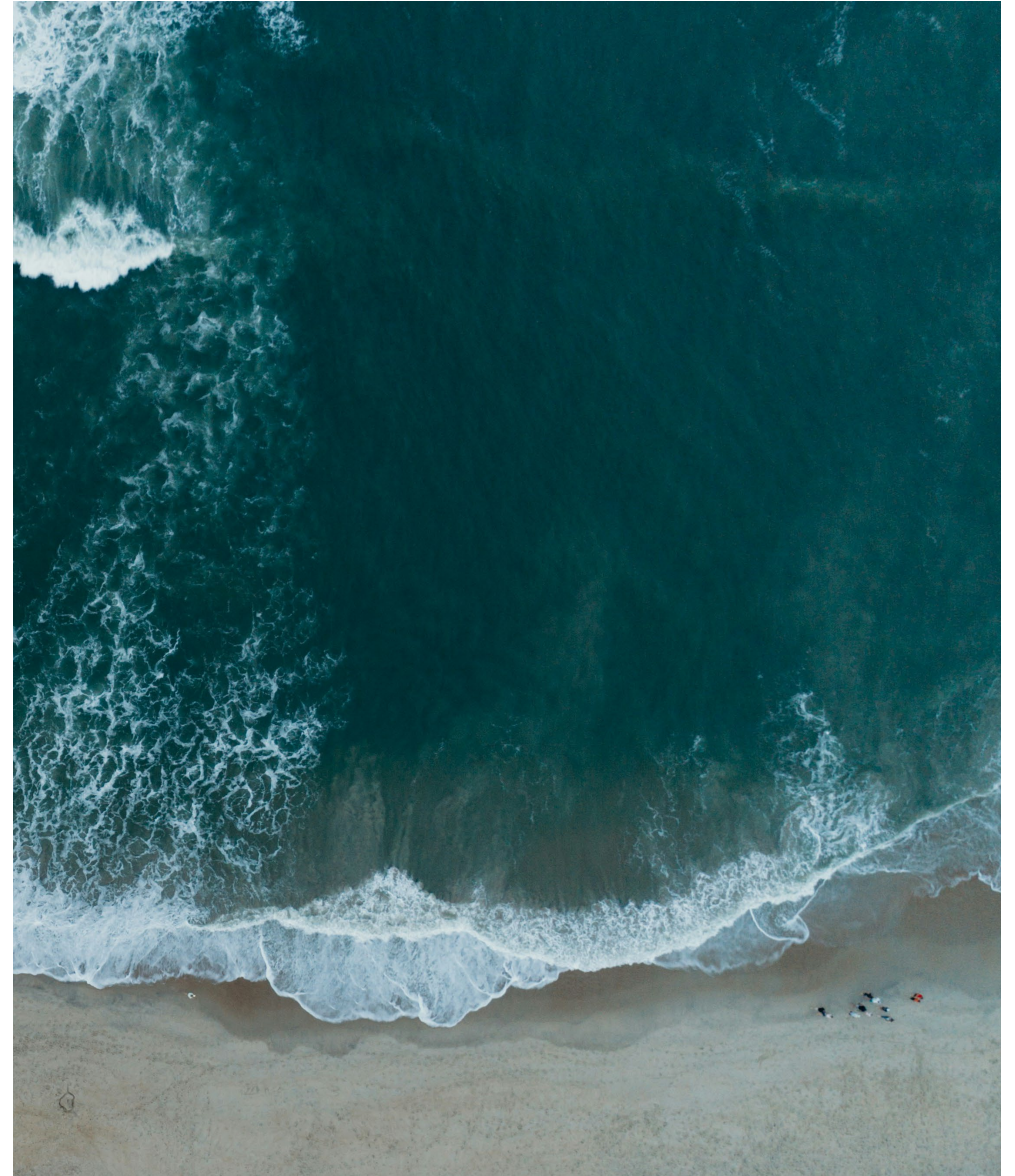


Base: North Carolina Prospect (n=1,703)
Source: MMGY's 2025 *Portrait of American Travelers* ® "Summer Edition"

Key Insights

Vacation Motivators and Activities

- AI usage among prospects has increased significantly over the previous year, jumping from **36% to 49%** in one year. One in 3 (34%) trust AI travel recommendations indicating a growing number of prospects will plan, and even book, their travel directly through AI in the coming years.
- Prospects are most likely to stay in a hotel or resort, visit friends and family and/or travel by personal car in the next six months. These travelers are most likely to travel with their significant other in this period.
- Spending time with family, and the desire to get away and unplug are major travel motivators.





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THANK YOU