Future Partners

The State of Dallas Travel

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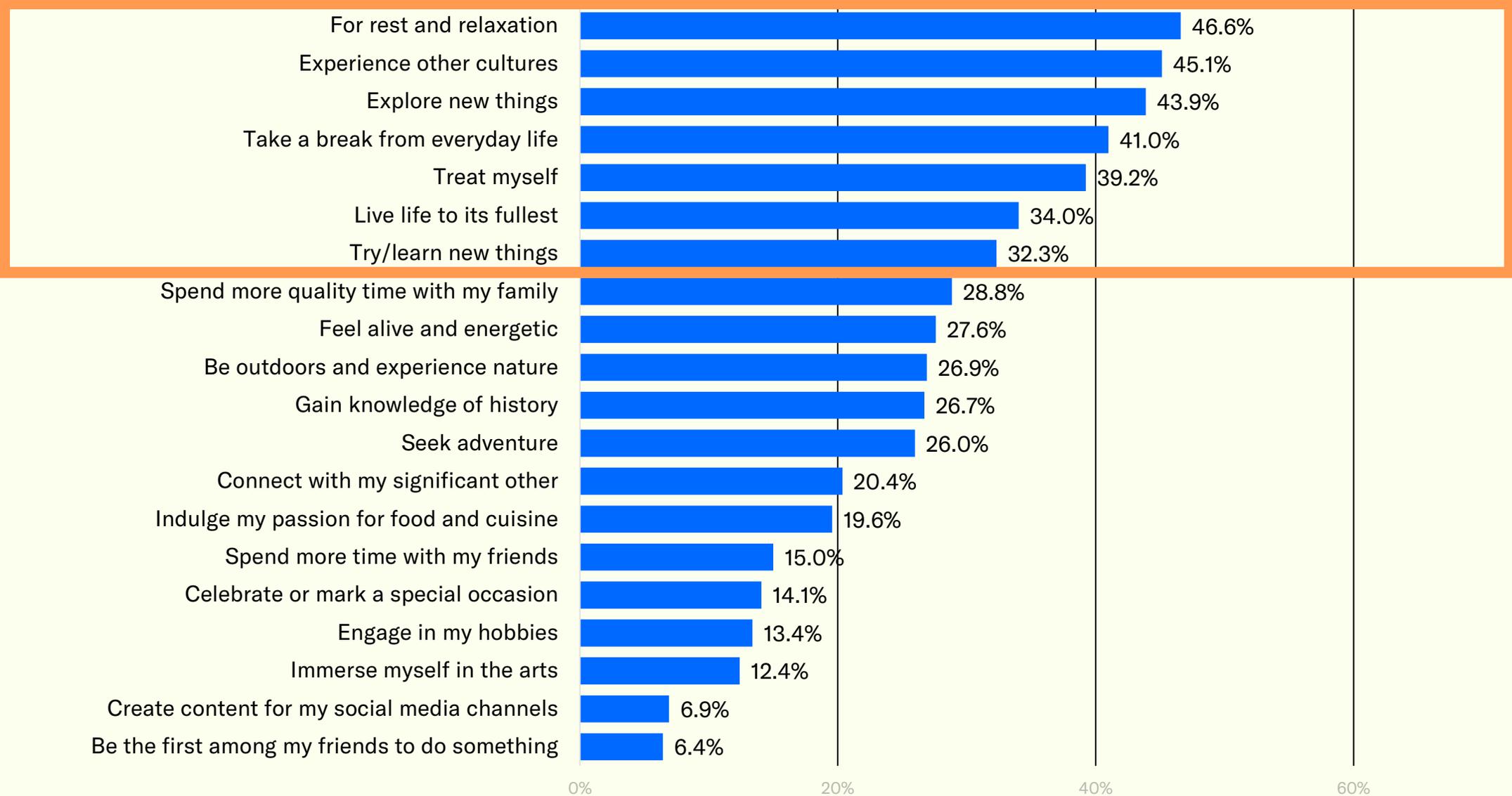
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The State of the International Traveler

- Tracking study conducted since 2014

- Online survey methodology
  - Screened for likely international travel in the next 3 years

- Over 800 fully completed surveys were collected from a random sample of likely international travelers in each market

- In total, 13,200 completed surveys were collected

	SAMPLE SIZE
Argentina	825
Australia	825
Brazil	825
Canada	825
China	825
Colombia	825
France	825
Germany	825
India	825
Italy	825
Japan	825
Mexico	825
Netherlands	825
South Korea	825
Spain	825
United Kingdom	825
TOTAL	**13,200**

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General Drivers of Travel

Driver	Percentage
For rest and relaxation	46.6%
Experience other cultures	45.1%
Explore new things	43.9%
Take a break from everyday life	41.0%
Treat myself	39.2%
Live life to its fullest	34.0%
Try/learn new things	32.3%
Spend more quality time with my family	28.8%
Feel alive and energetic	27.6%
Be outdoors and experience nature	26.9%
Gain knowledge of history	26.7%
Seek adventure	26.0%
Connect with my significant other	20.4%
Indulge my passion for food and cuisine	19.6%
Spend more time with my friends	15.0%
Celebrate or mark a special occasion	14.1%
Engage in my hobbies	13.4%
Immerse myself in the arts	12.4%
Create content for my social media channels	6.9%
Be the first among my friends to do something	6.4%

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The State of the International Traveler 2026

The USA Continues to Rank First as a Most Desired International Destination

Most Desired International Destinations: 2018—2026
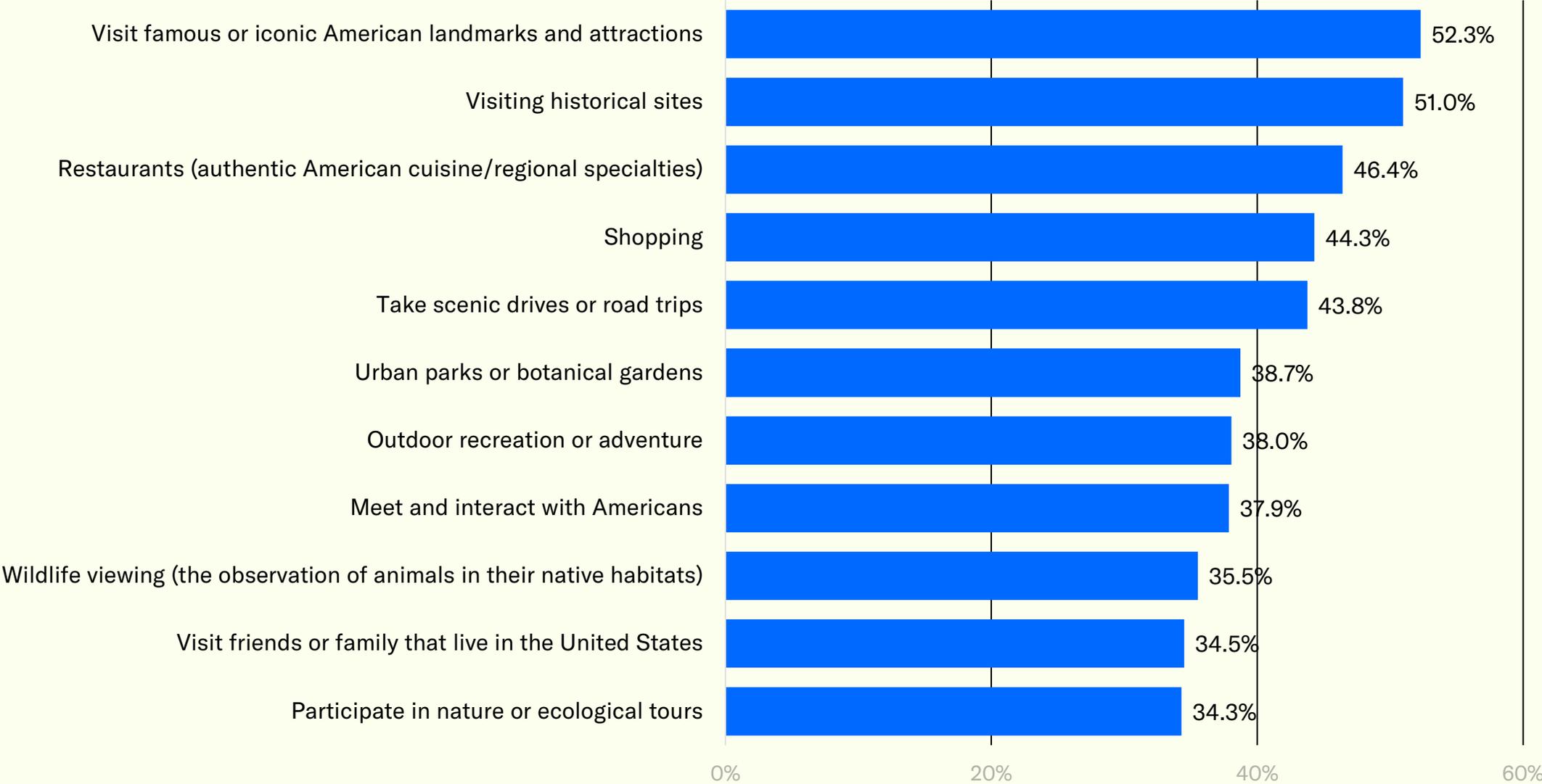### (Unaided, Total Aggregate)

Legend: United States — Spain — Italy — France — Japan

United States: 2018: 32.7% | 2019: 33.5% | 2020: 33.8% | 2021: 33.6% | 2022: 35.9% | 2023: 30.0% | 2024: 36.6% | 2025: 35.0% | 2026: 33.2%

Spain: 2018: 17.3% | 2019: 17.8% | 2020: 18.5% | 2021: 19.5% | 2022: 16.9% | 2023: 19.1% | 2024: 18.0% | 2025: 18.5% | 2026: 20.5%

Italy: 2018: 16.6% | 2019: 17.1% | 2020: 18.0% | 2021: 17.3% | 2022: 15.5% | 2023: 16.5% | 2024: 17.5% | 2025: 17.7% | 2026: 17.5%

France: 2018: 15.0% | 2019: 15.2% | 2020: 14.9% | 2021: 14.4% | 2022: 14.4% | 2023: 15.0% | 2024: 17.2% | 2025: 17.2% | 2026: 14.2%

Japan: 2018: 12.3% | 2019: 14.2% | 2020: 13.4% | 2021: 12.9% | 2022: 12.8% | 2023: 10.6% | 2024: 12.4% | 2025: 15.9% | 2026: 15.7%

Excitement for Types of U.S. Destinations

Destination Types Most Excited to Visit
Average Excitement Score on a Scale of 1 to 10

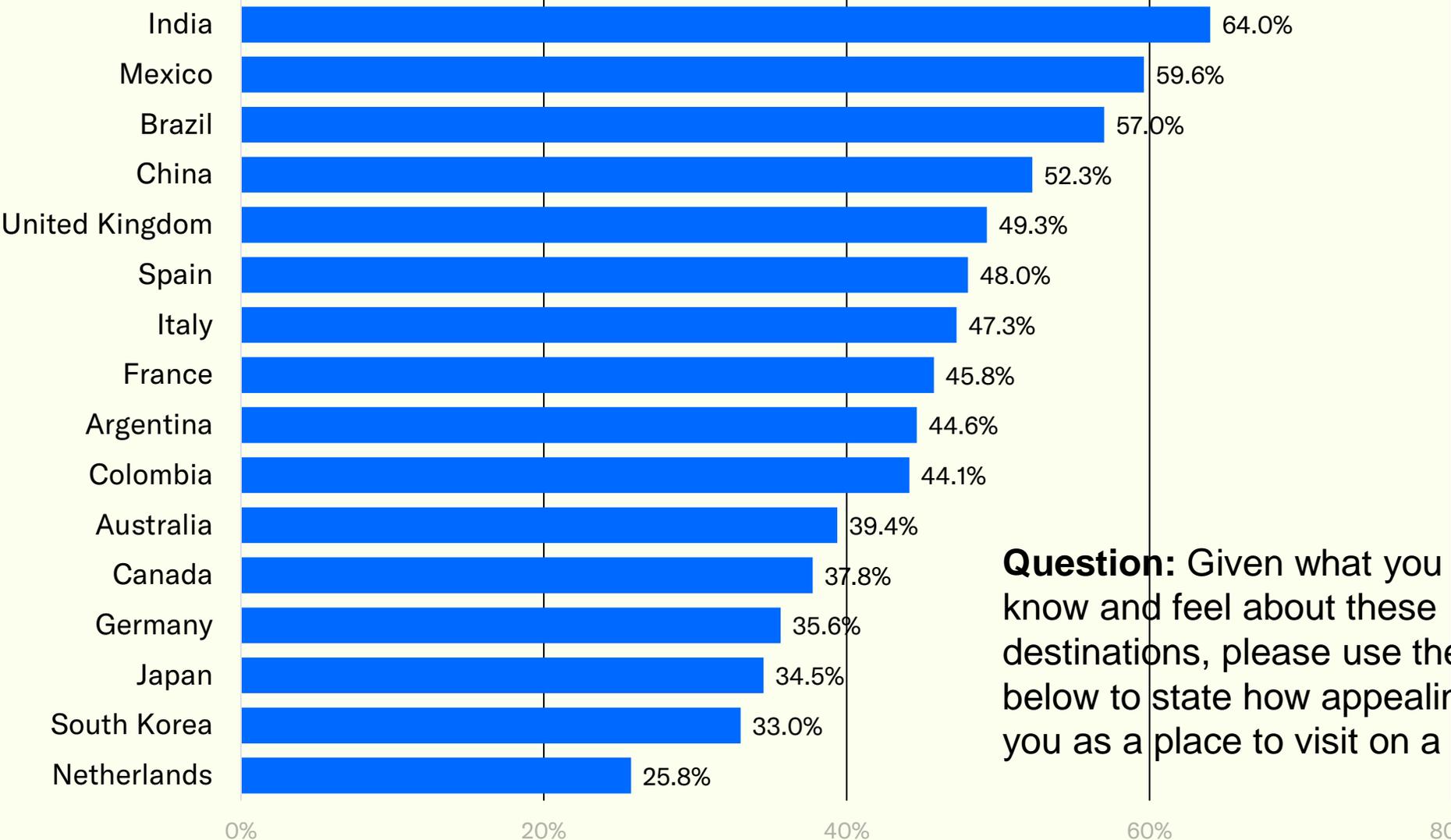| Destination Type	Score
Urban or large city destinations	7.6
U.S. National Parks	7.5
Beach destinations/resorts	7.3
Theme or amusement parks	7.0
Small towns, villages or rural destinations	6.8
Mountain destinations (including ski resorts)	6.5
Desert destinations/resorts	6.3

Important U.S. Leisure Trip Experiences

Experience	Percentage
Visit famous or iconic American landmarks and attractions	52.3%
Visiting historical sites	51.0%
Restaurants (authentic American cuisine/regional specialties)	46.4%
Shopping	44.3%
Take scenic drives or road trips	43.8%
Urban parks or botanical gardens	38.7%
Outdoor recreation or adventure	38.0%
Meet and interact with Americans	37.9%
Wildlife viewing (the observation of animals in their native habitats)	35.5%
Visit friends or family that live in the United States	34.5%
Participate in nature or ecological tours	34.3%

Most Appealing Destinations

Destination	Percentage
New York City, New York	72.6%
Niagara Falls, New York	68.5%
Miami, Florida	65.2%
Los Angeles, California	64.2%
San Francisco, California	64.1%
Washington, DC	62.3%
Orlando, Florida	58.2%
Honolulu, Hawaii	58.1%
Las Vegas, Nevada	57.9%
San Diego, California	51.8%
Chicago, Illinois	49.8%
Anaheim/Disneyland, California	49.2%
Philadelphia, Pennsylvania	48.4%
Houston, Texas	48.0%
Boston, Massachusetts	48.0%
Seattle, Washington	47.9%
New Orleans, Louisiana	47.3%
Atlantic City, New Jersey	45.1%
Dallas/Fort Worth, Texas	44.9%
Newport Beach, California	44.3%
Austin, Texas	44.1%
Napa Valley, California	43.7%
San Antonio, Texas	42.8%
Denver, Colorado	42.6%
Nashville, Tennessee	42.4%
Memphis, Tennessee	41.6%
Phoenix, Arizona	41.3%
Atlanta, Georgia	41.2%
Salt Lake City, Utah	40.0%
Pittsburgh, Pennsylvania	39.6%
Anchorage, Alaska	39.5%
Portland, Oregon	37.7%
Baltimore, Maryland	36.6%
St. Louis, Missouri	36.4%
Minneapolis-St. Paul, Minnesota	36.2%
Savannah, Georgia	36.1%
Charlotte, North Carolina	34.7%
Rapid City, Mt. Rushmore, Badlands area	34.4%
Asheville, North Carolina	33.1%
Little Rock, Arkansas	33.1%
Mobile, Alabama	32.1%

Question: Given what you currently know and feel about these destinations, please use the scale below to state how appealing each is to you as a place to visit on a vacation?

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The State of the International Traveler 2026

Countries Who Find Dallas Most Appealing

Country	Percentage
India	64.0%
Mexico	59.6%
Brazil	57.0%
China	52.3%
United Kingdom	49.3%
Spain	48.0%
Italy	47.3%
France	45.8%
Argentina	44.6%
Colombia	44.1%
Australia	39.4%
Canada	37.8%
Germany	35.6%
Japan	34.5%
South Korea	33.0%
Netherlands	25.8%

Question: Given what you currently know and feel about these destinations, please use the scale below to state how appealing each is to you as a place to visit on a vacation?

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The State of the International Traveler 2026

Planning & Booking Windows

Advance Travel Planning
(Avg. # of weeks planned in advance)

13.7

Country	Weeks
Australia	16.4
United Kingdom	16.1
Japan	15.8
Germany	15.6
Brazil	15.1
France	14.8
Argentina	14.7
Netherlands	14.6
South Korea	14.0
Colombia	13.7
Italy	13.6
Canada	13.5
Spain	12.9
Mexico	11.6
India	10.4
China	8.5

Advance Travel Booking
(Avg. # of weeks booked in advance)

12.3

Country	Weeks
Australia	14.6
United Kingdom	14.5
Japan	14.4
Germany	14.2
Netherlands	13.8
Brazil	13.5
France	13.2
Argentina	13.2
South Korea	12.7
Italy	12.5
Canada	12.0
Colombia	11.7
Spain	11.6
Mexico	10.5
India	9.5
China	7.0
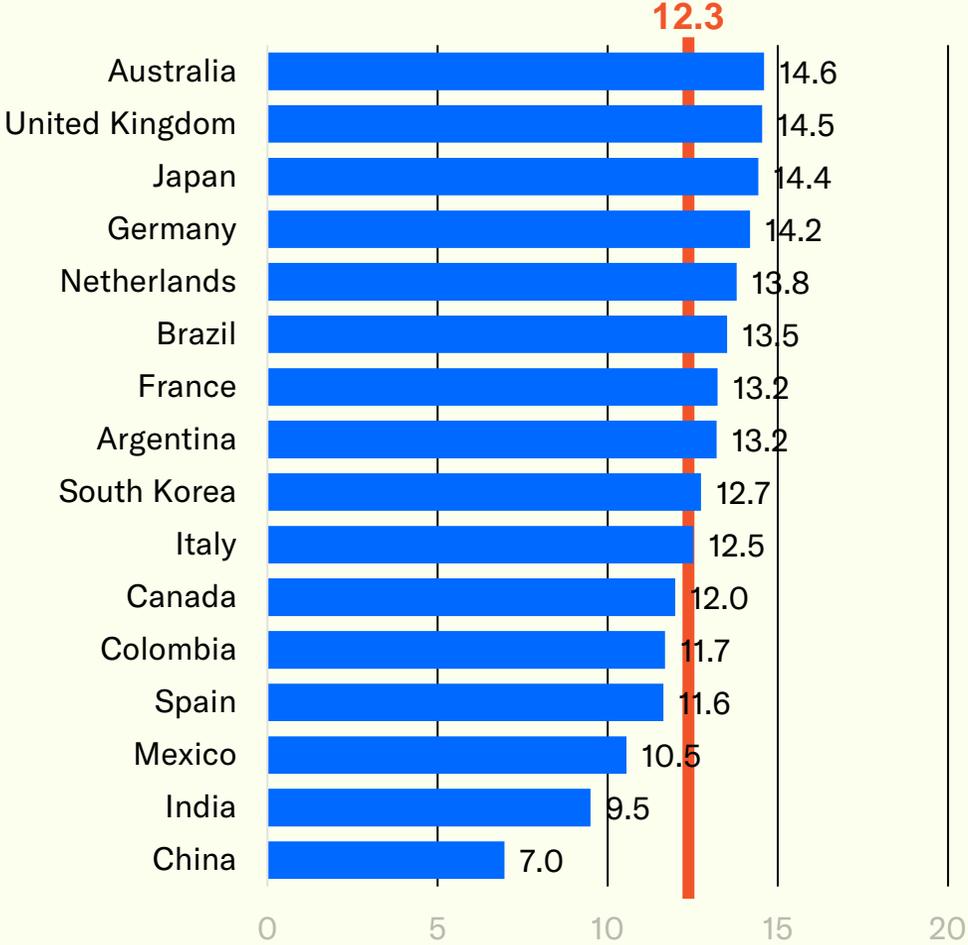
Online Search Surpassed Word-of-Mouth as the Top Source of Destination Inspiration

Sources Use for Destination Inspiration – Change Compared to Last Year
(% of Total Aggregate)

Online search
- 44.2% (2023)
- 49.2% (2024)
- 46.0% (2025)

Word-of-mouth
- 47.2% (2023)
- 39.2% (2024)
- 35.4% (2025)

Legend: ■ 2023 ■ 2024 ■ 2025
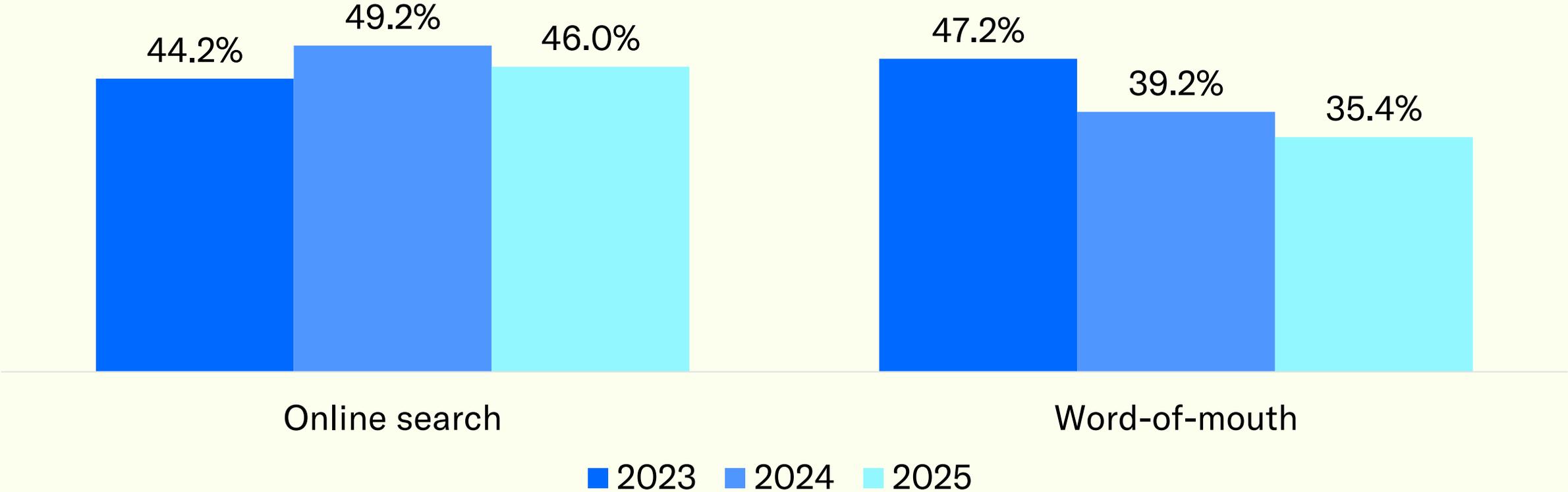
Marketing Considerations

Top 10 Sources of Destination Inspiration
(Total Aggregate)

Source	Percentage
Online search engines	46.0%
Online travel agencies	39.9%
Online travel content	35.6%
Opinions of friends, colleagues, or relatives	35.4%
Tour agent or tour operator websites	32.6%
Social media	31.9%
Official visitor bureau's website	31.3%
Travel agent – offline (traditional or store front)	27.2%
Official visitors bureau's visitor information...	25.6%
Travel or lifestyle magazine – printed or online	19.9%
Official visitor bureau's social media content	18.2%
Artificial Intelligence tool (ChatGPT, etc.)	16.8%
Commercial guidebook	16.5%
Digital influencers	12.0%
Newspaper travel section – printed or online	11.5%
Podcasts	7.6%

Online Media vs. Word-of-Mouth Preference
(By Market)

	Online Search	Word-of-Mouth (WOM)	Difference: Online over WOM
Japan	50.5%	24.2%	+26.3pp
South Korea	55.5%	37.8%	+17.7pp
Australia	57.8%	41.0%	+16.8pp
India	59.5%	43.0%	+16.5pp
Italy	43.4%	28.0%	+15.4pp
Netherlands	43.8%	28.8%	+14.9pp
Canada	56.0%	42.8%	+13.2pp
United Kingdom	50.2%	37.6%	+12.6pp
Germany	45.3%	33.3%	+12.0pp
Brazil	46.5%	37.1%	+9.5pp
France	36.7%	30.4%	+6.3pp
Mexico	36.2%	31.8%	+4.5pp
China	35.3%	33.5%	+1.8pp
Colombia	40.5%	39.4%	+1.1pp
Spain	36.5%	36.1%	+0.4pp
Argentina	41.7%	42.1%	-0.4pp

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The State of the International Traveler 2026

Use of Destination Marketing Organization Digital Content for Travel Planning

DMO Websites

Japan	33.2%
United Kingdom	33.2%
Spain	32.1%
Canada	31.6%
Argentina	30.9%
Germany	27.8%
Italy	26.5%
France	26.4%
Brazil	25.6%
Netherlands	25.3%
South Korea	21.7%
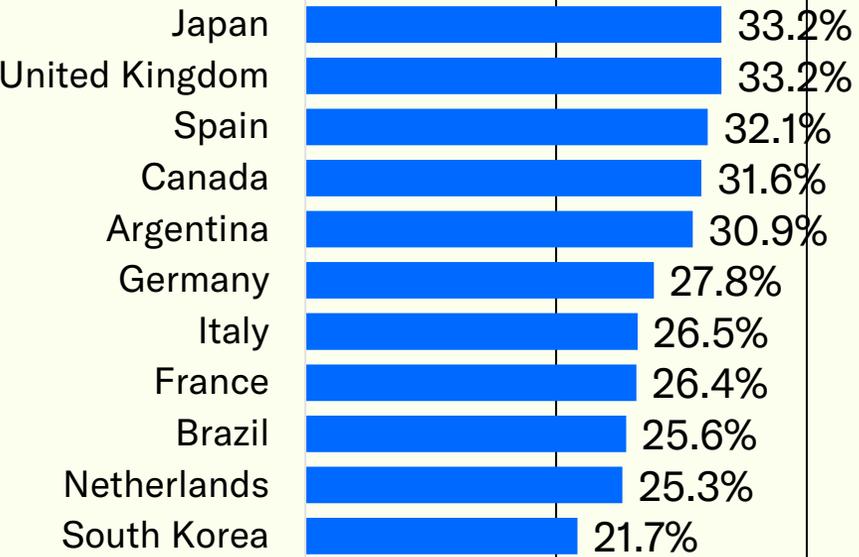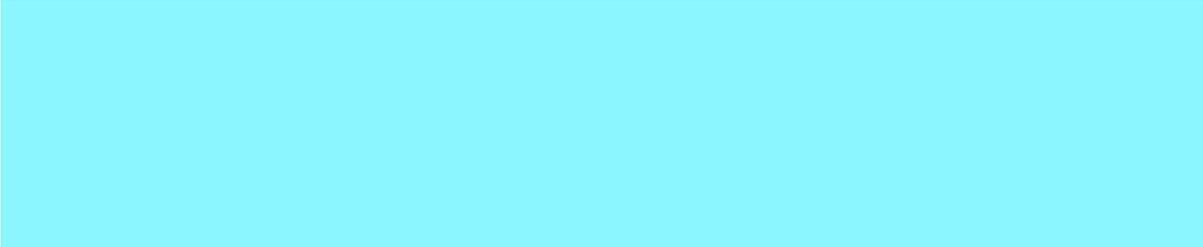
31.3%
Aggregate average

DMO Social Media Content
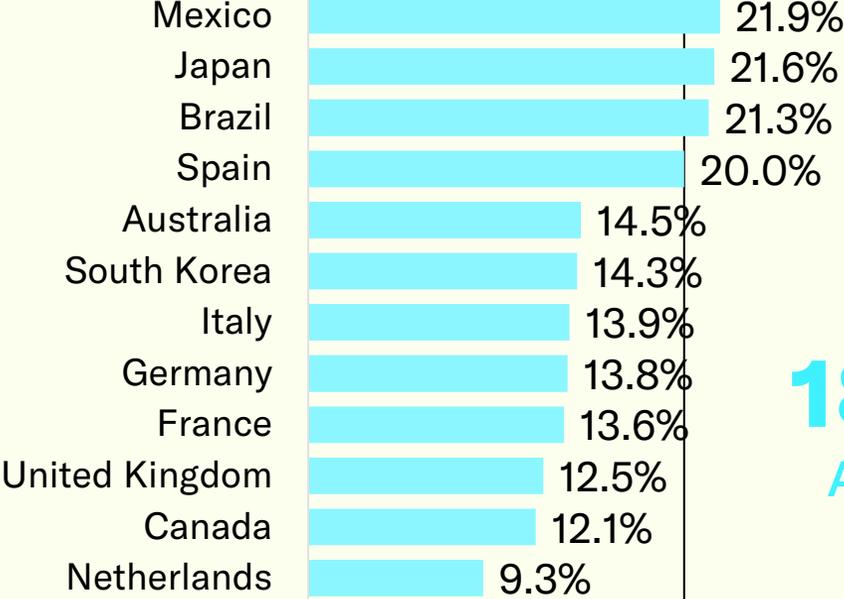
Mexico	21.9%
Japan	21.6%
Brazil	21.3%
Spain	20.0%
Australia	14.5%
South Korea	14.3%
Italy	13.9%
Germany	13.8%
France	13.6%
United Kingdom	12.5%
Canada	12.1%
Netherlands	9.3%

18.2%
Aggregate average

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Dreaming Phase

Considering Phase

Planning Phase

Experiencing Phase

Post-Trip
Sharing Phase

Top Used Social Media Channels in the Travel Planning Journey

Dreaming Phase

Top Used Social Media Channel

Channel	Percentage
Instagram	39.0%
YouTube	38.7%
Facebook	27.3%
TikTok	17.7%
WhatsApp	12.2%
Twitter/X	11.0%
Pinterest	10.4%
Telegram	6.8%
Snapchat	4.9%
LinkedIn	4.4%
Reddit	3.6%
Discord	3.6%
Threads	3.5%
Kakaostory	1.0%
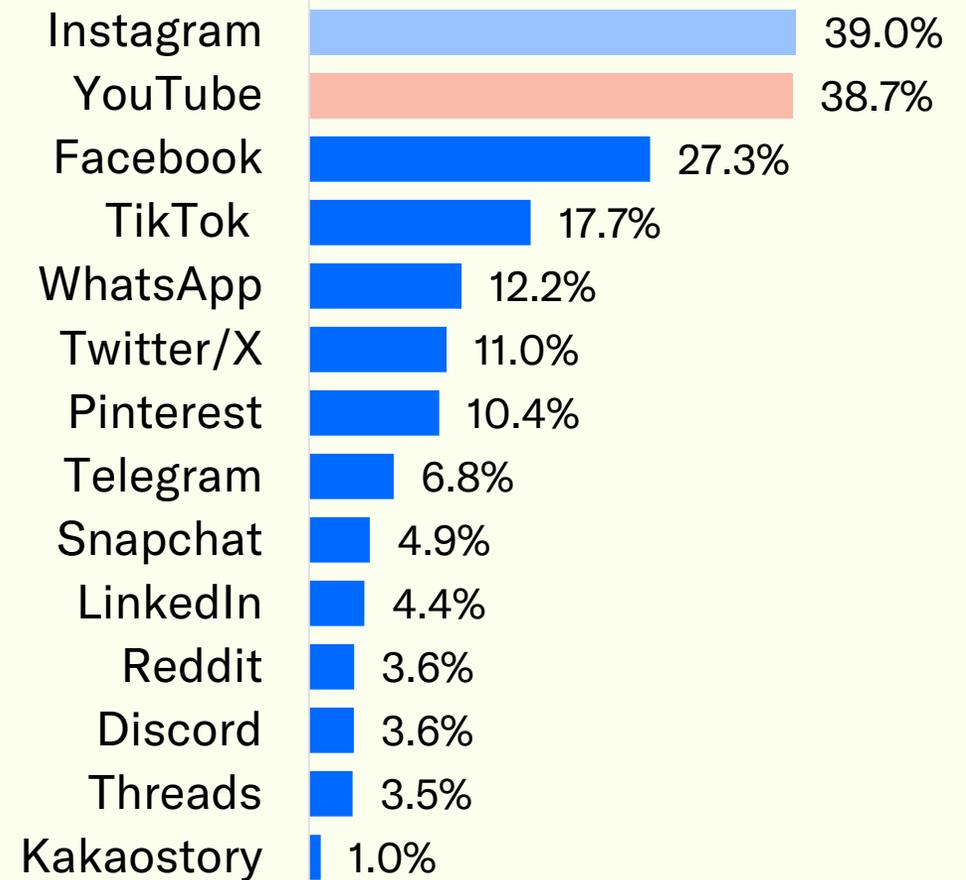
Dreaming Phase

Considering Phase

Top Used Social Media Channel

Channel	Percentage
YouTube	38.8%
Instagram	35.6%
Facebook	24.8%
TikTok	15.5%
WhatsApp	14.2%
Twitter/X	13.0%
Pinterest	8.6%
Telegram	7.2%
LinkedIn	5.7%
Snapchat	5.5%
Reddit	4.9%
Threads	3.4%
Discord	3.2%
Kakaostory	1.3%
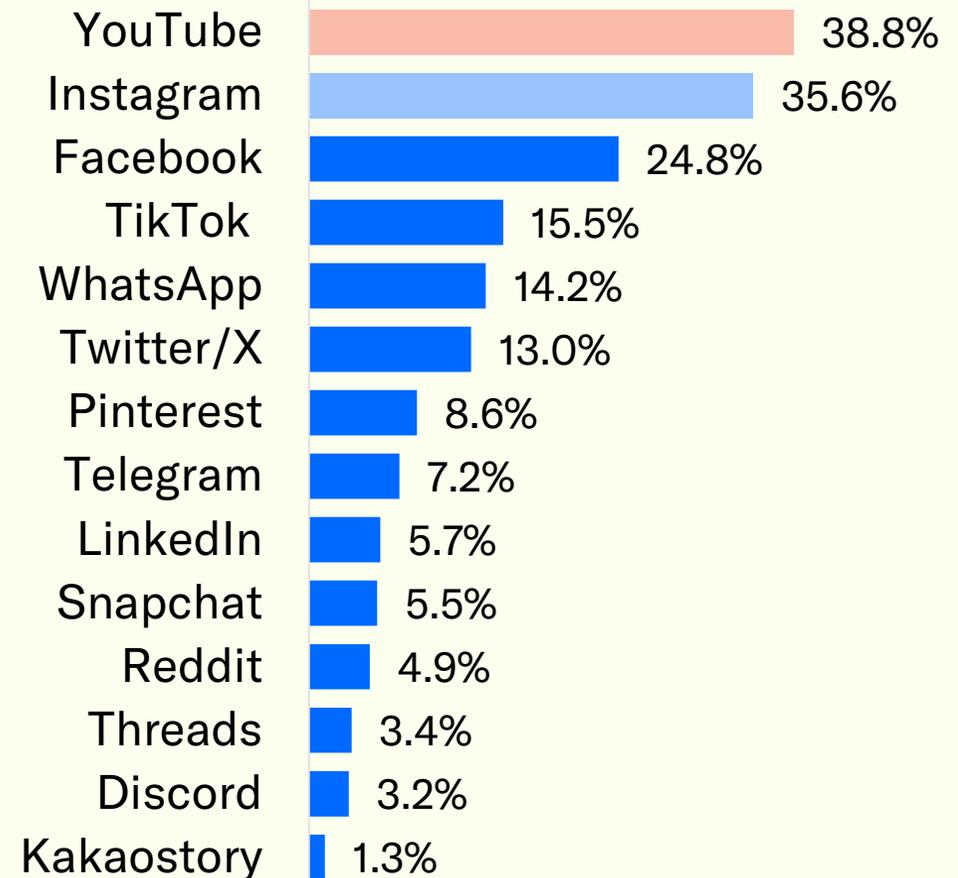
Dreaming Phase

Considering Phase

Planning Phase

Top Used Social Media Channel

Channel	Percentage
YouTube	37.3%
Instagram	32.2%
Facebook	22.1%
WhatsApp	15.8%
TikTok	14.8%
Twitter/X	12.0%
Telegram	8.0%
Pinterest	7.3%
LinkedIn	6.1%
Snapchat	5.4%
Reddit	4.8%
Threads	3.5%
Discord	3.3%
Kakaostory	1.1%
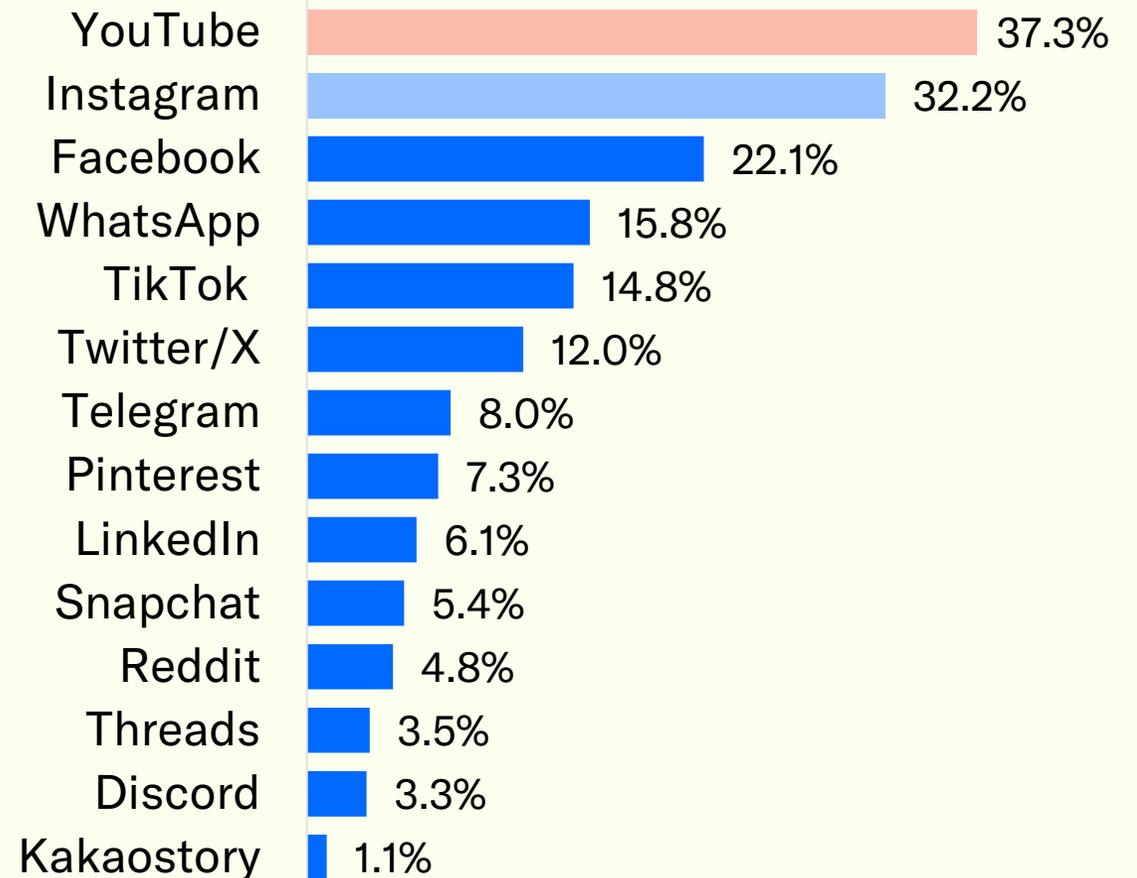
Dreaming Phase

Considering Phase

Planning Phase

Experiencing Phase

Top Used Social Media Channel
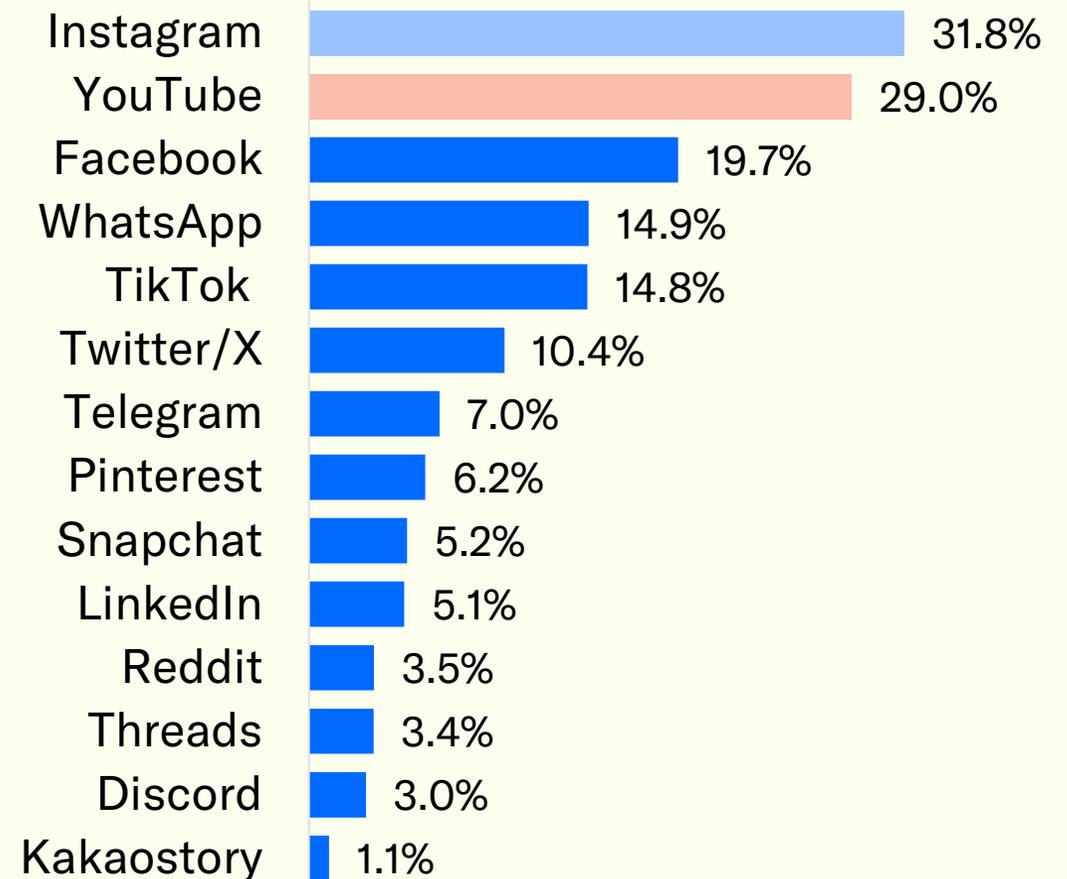
Channel	Percentage
Instagram	31.8%
YouTube	29.0%
Facebook	19.7%
WhatsApp	14.9%
TikTok	14.8%
Twitter/X	10.4%
Telegram	7.0%
Pinterest	6.2%
Snapchat	5.2%
LinkedIn	5.1%
Reddit	3.5%
Threads	3.4%
Discord	3.0%
Kakaostory	1.1%

Dreaming Phase

Considering Phase

Planning Phase

Experiencing Phase

Post-Trip Sharing Phase

Top Used Social Media Channel

Channel	Percentage
Instagram	32.3%
Facebook	21.6%
YouTube	19.3%
WhatsApp	16.7%
TikTok	11.6%
Twitter/X	9.8%
Telegram	6.3%
Snapchat	4.8%
Pinterest	4.8%
LinkedIn	4.1%
Threads	3.1%
Reddit	2.8%
Discord	2.3%
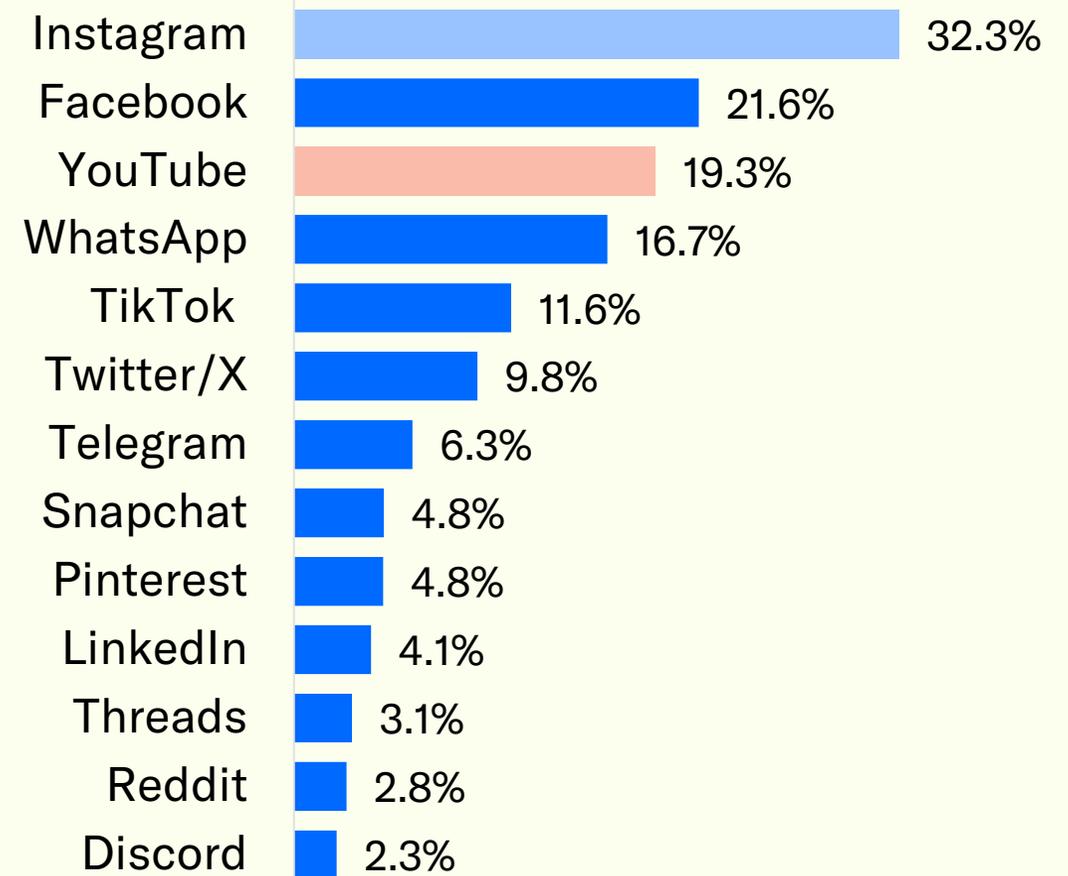
Desired Tone for International Destination Ads

% of Total Aggregate

Tone	%
Friendly/welcoming	46.3%
Positive/joyful	42.9%
Calm/relaxing/peaceful	40.4%
Fun/playful/exciting	37.5%
Shows a variety of activities/things to do	35.4%
Scenic/picturesque	33.8%
Informative/educational	33.5%
Inspirational/encouraging	33.4%
Sophisticated/elegant/refined	21.0%
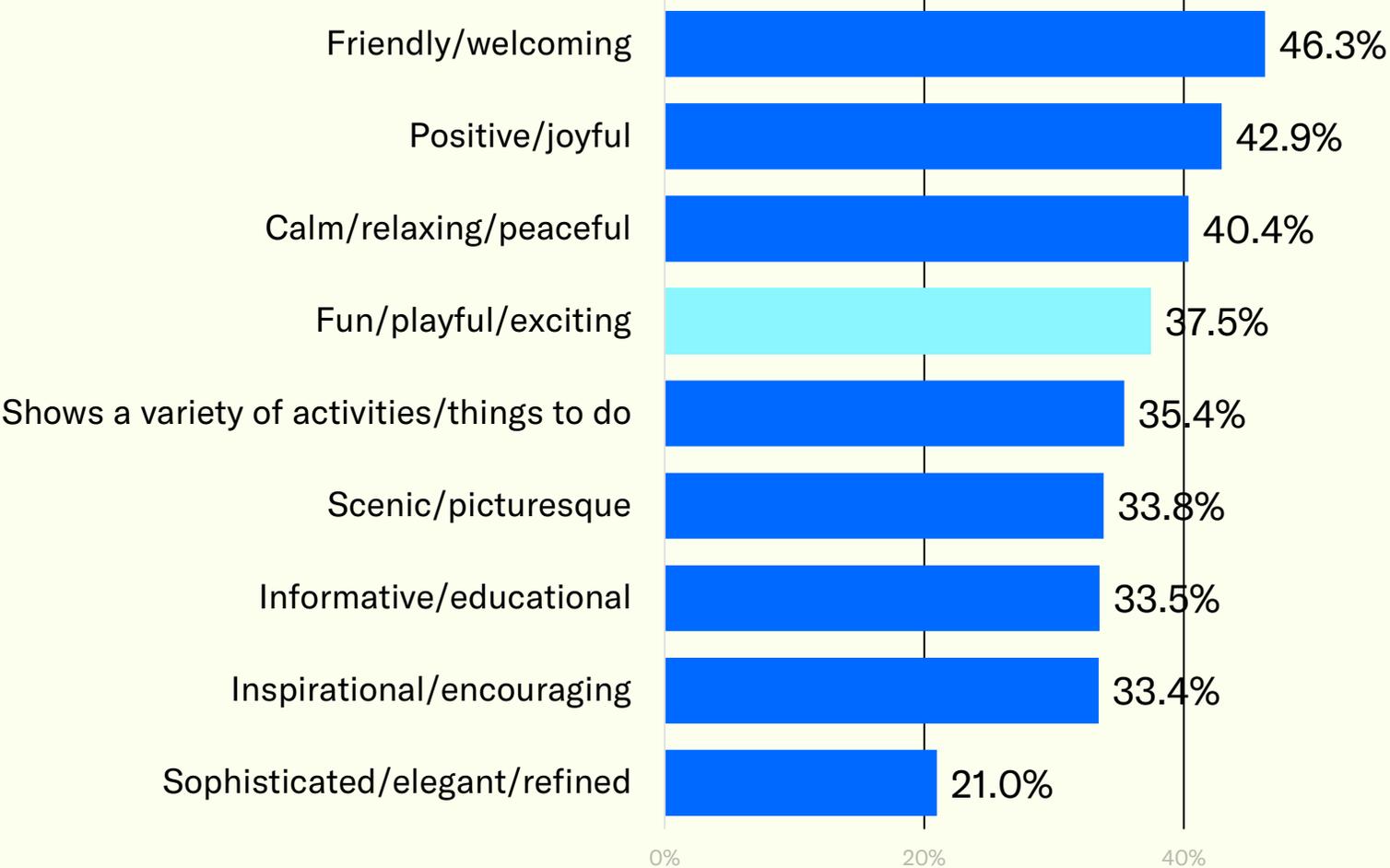
Desire a Fun/Playful/Exciting Tone

Country	%
India	52.4%
Mexico	50.9%
Colombia	50.5%
China	48.1%
France	21.2%
Germany	13.7%

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The Role of Sporting Events

The Role of Professional Sporting Events

Professional Sporting Events Likely to Attend on a Trip to the United States
(Total Aggregate)

Event	Percentage
National Basketball Association game	30.1%
National Football League game	25.2%
Major League Baseball game	23.5%
Major League Soccer game	22.2%
National Hockey League game	14.1%
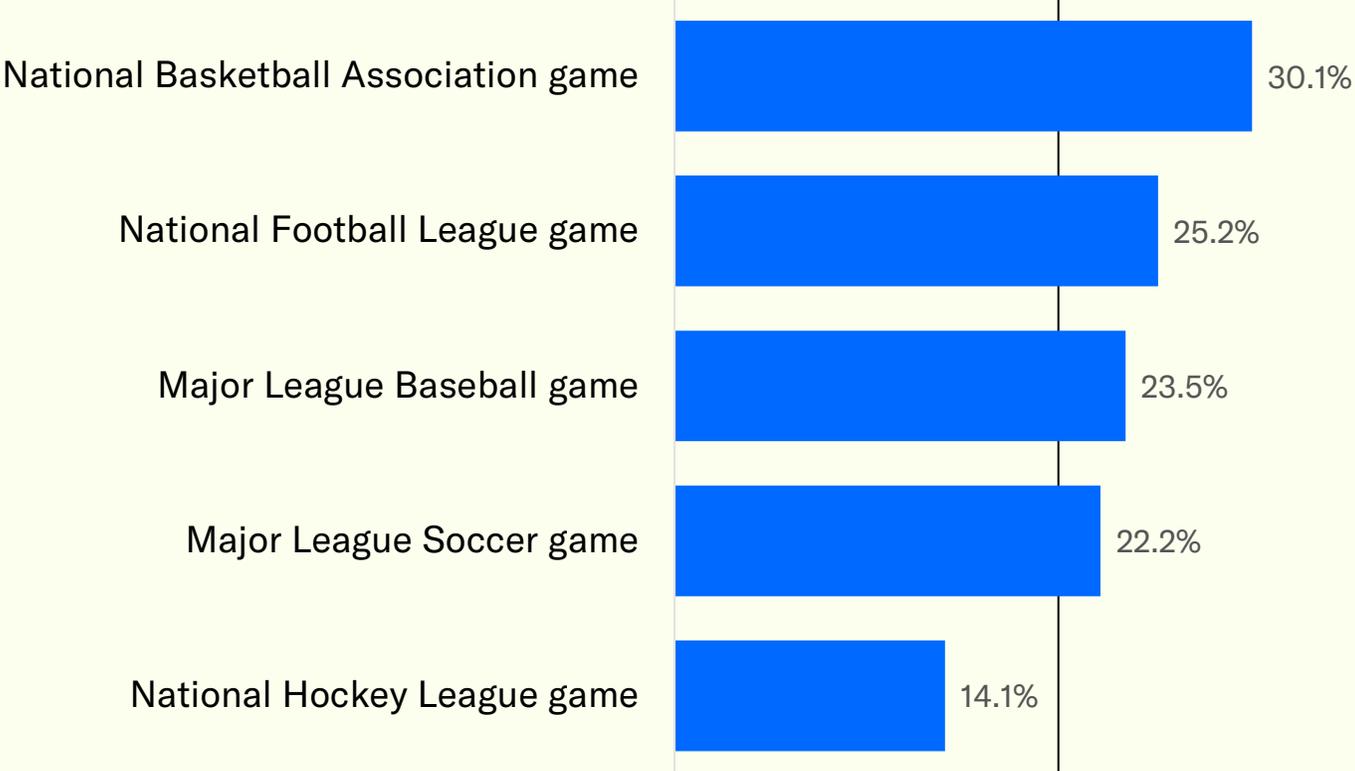
The Impact of the 2026 FIFA World Cup

Interest in Traveling to the U.S. for the 2026 FIFA World Cup
(Total Aggregate)

50.8%

Category	Value
Very interested	23.8%
Interested	27.0%
Neutral	19.2%
Uninterested	11.9%
Very uninterested	18.1%

Country	Value
India	86.1%
Brazil	75.2%
China	73.6%
Argentina	65.7%
Mexico	63.6%
Colombia	62.3%
South Korea	48.7%
Italy	46.4%
Japan	44.6%
Spain	44.2%
United Kingdom	42.9%
France	41.9%
Australia	30.2%
Germany	29.9%
Netherlands	29.9%
Canada	27.4%

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The State of the International Traveler 2026

The Impact of the 2026 FIFA World Cup

2026 FIFA World Cup Hypothetical Trip – Number of Days for U.S. Destinations Visited

	# of Days in U.S.	# of Destinations	Days per Destination
Colombia	20.9	12.4	1.7
Argentina	17.7	5.7	3.1
Brazil	15.6	6.8	2.3
Mexico	15.3	15.1	1.0
India	15.3	8.6	1.8
Germany	13.6	6.7	2.0
Australia	13.2	5.1	2.6
Spain	12.5	4.4	2.8
Netherlands	12.4	5.8	2.2
United Kingdom	12.4	5.2	2.4
Italy	12.1	5.0	2.4
France	11.4	4.5	2.5
South Korea	8.4	3.4	2.5
China	8.3	3.3	2.6
Canada	8.3	3.3	2.5
Japan	8.0	4.9	1.6

2026 FIFA World Cup Hypothetical Trip – Likely Travel Party Size

India	10.4
Colombia	4.9
Mexico	4.9
Japan	4.0
South Korea	3.9
Brazil	3.6
Netherlands	3.4
United Kingdom	3.3
Germany	3.2
Australia	2.7
Canada	2.7
France	2.7
Argentina	2.7
Italy	2.7
China	2.6
Spain	2.5
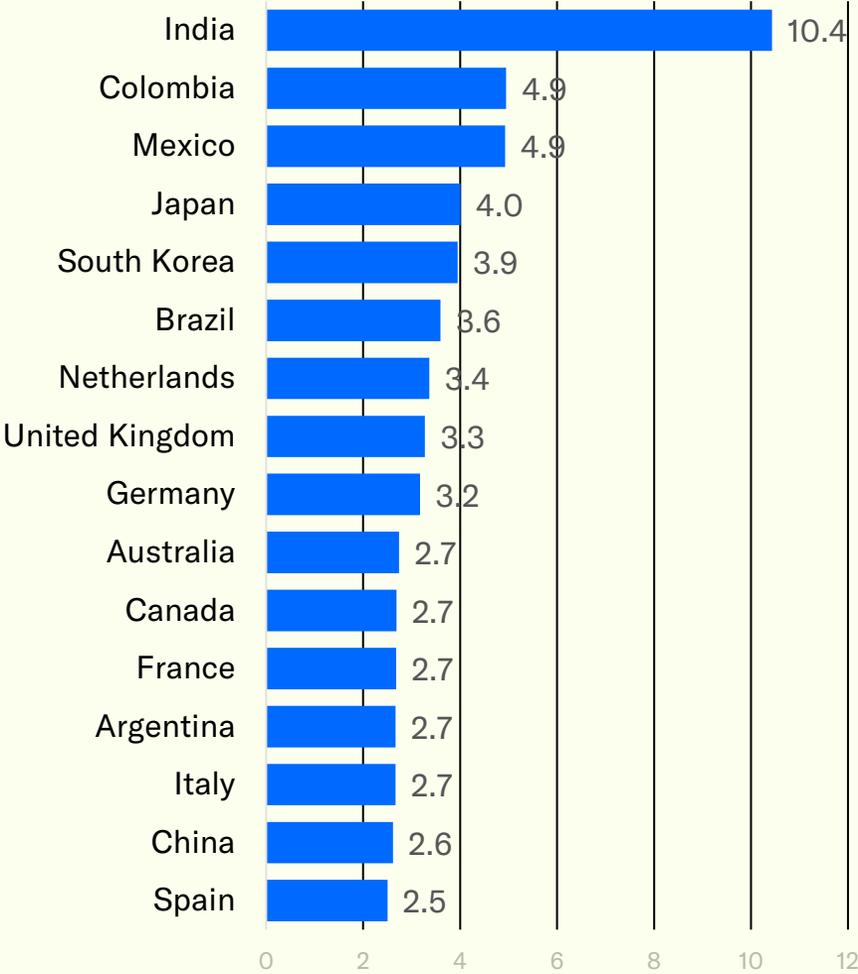
The Impact of the 2028 Olympic Games

Interest in Traveling to the U.S. 2028 Olympic Games
(Total Aggregate)

51.4%

Category	Percentage
Very interested	22.7%
Interested	28.7%
Neutral	20.8%
Uninterested	12.0%
Very uninterested	15.8%

Country	Percentage
India	87.9%
China	77.6%
Brazil	75.6%
Mexico	66.9%
Colombia	54.5%
Italy	51.6%
Japan	51.3%
South Korea	48.1%
Argentina	47.6%
France	47.3%
Spain	45.6%
United Kingdom	41.8%
Australia	34.5%
Germany	32.8%
Netherlands	29.9%
Canada	28.5%

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The State of the American Traveler

- Monthly tracking survey

- Representative sample of adult American travelers in each of four U.S. regions

- Tracks traveler sentiment to generate insights into domestic travel trends

- 4,000+ fully completed surveys collected each wave.

- Surveys collected thru December 2025

- Confidence interval of +/- 1.55%

- Data is weighted to reflect the actual population of each region

United States Census Regions and Divisions
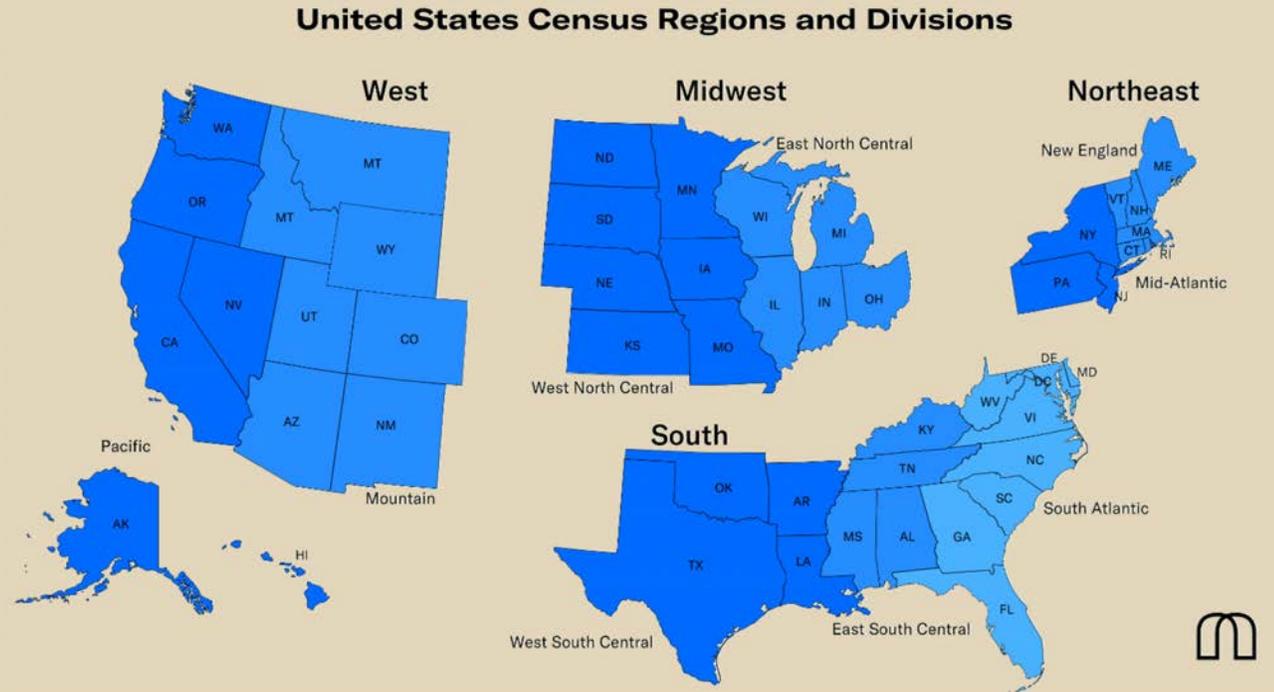
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Traveler Sentiment

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Americans Are Very Excited to Travel

Question:

Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?

Rating	Percentage
10 - I am extremely excited	
9	
8	
7	
6	
5	7.0%
4	1.7%
3	1.6%
2	1.5%
1	0.7%
0 - I am not at all excited	1.6%

0% 10% 20% 30% 40% 50%
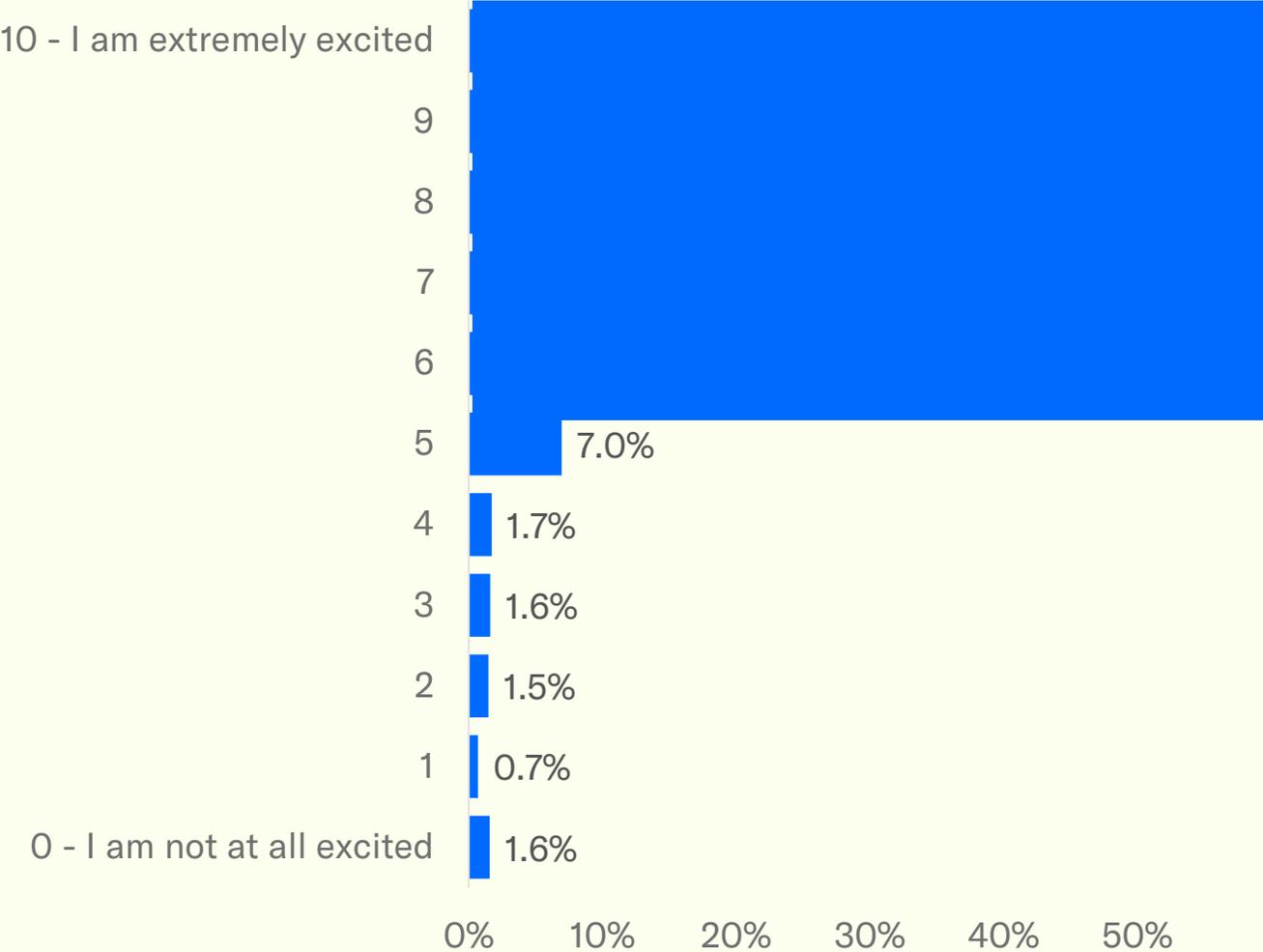
Travel Excitement Has Reached a New Normal— and It's High. Some Recent Declines Seen.

Question: Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?

2021　2022　2023　2024　2025

Mean Score on 11-point Scale

9

8

7

6

5

March 19-21
March 26-28
April 2-4
April 9-11
April 16-18
April 23-25
April 30 - May 2
May 6-8
May 13-15
May 20-22
May 26-28
June 2-4
June 9-11
June 16-18
June 23-25
July 7-9
July 21-23
August 4-6
Aug 18-20
Sept 1-3
Sept 15-17
Sept 29-Oct 1
Oct 13-15
Oct 27-29
Nov 10-12
Nov 24-26
Dec 8-10
Dec 26-28
January 2022
February 2022
March 2022
April 2022
May 2022
June 2022
July 2022
August 2022
September 2022
October 2022
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Feb 2025
March 2025
April 2025
May 2025
June 2025
July 2025
Aug 2025
Sept 2025
Oct 2025
Nov 2025
Dec 2025

Household Finances: Some Unease, But No Dramatic Change From Last Month

Question:
Would you say that you (and your household) are better off or worse off financially than you were a year ago?

Much better off

Better off

UNCHANGED - Neither better off nor worse off — 43.9%

Worse off

Much worse off

0% 10% 20% 30% 40% 50%
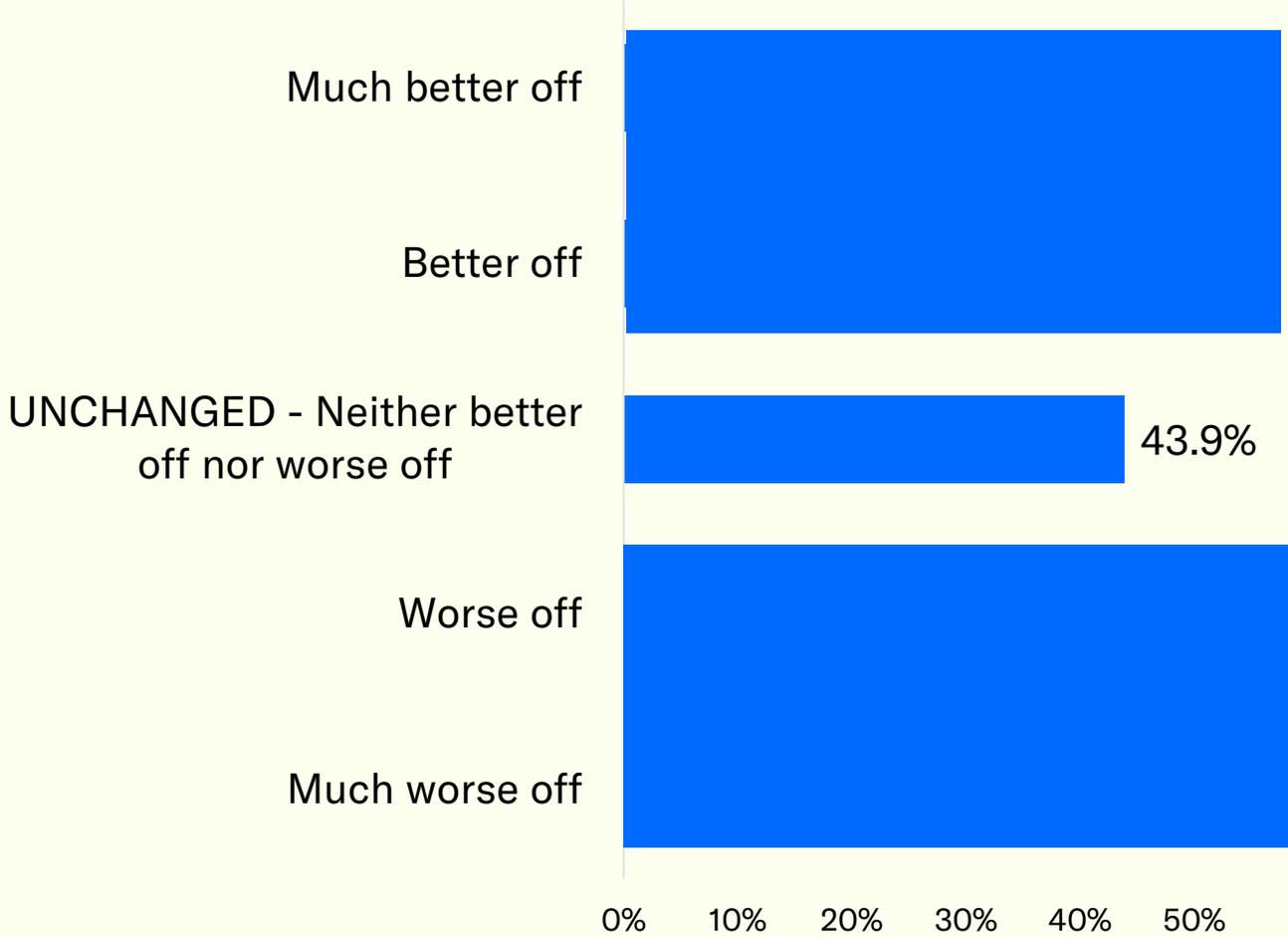
While Dropping This Month, Financial Sentiment Has Gradually Improved

Question: Would you say that you (and your household) are better off or worse off financially than you were a year ago?

2022 **2023** **2024** **2025**

50%

40%

30%

20%

% Worse off or Much worse off

10%

January 2022 February 2022 March 2022 April 2022 May 2022 June 2022 July 2022 August 2022 September 2022 October 2022 November 2022 December 2022 January 2023 February 2023 March 2023 April 2023 May 2023 June 2023 July 2023 August 2023 Sept 2023 Oct 2023 Nov 2023 Dec 2023 Jan 2024 Feb 2024 Mar 2024 Apr 2024 May 2024 June 2024 July 2024 Aug 2024 Sept 2024 Oct 2024 Nov 2024 Dec 2024 Jan 2025 Feb 2025 Mar 2025 Apr 2025 May 2025 June 2025 July 2025 Aug 2025 Sept 2025 Oct 2025 Nov 2025 Dec 2025

Future Partners

Base: All respondents, approx. 4,000 completed surveys per wave

Travel Spending Confidence Drops

Question:
Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?

Yes - It is a very good time

Yes - It is a good time

It is neither a good time nor bad time — 38.4%

No - It is a bad time

No - It is a very bad time

0% 10% 20% 30% 40% 50%
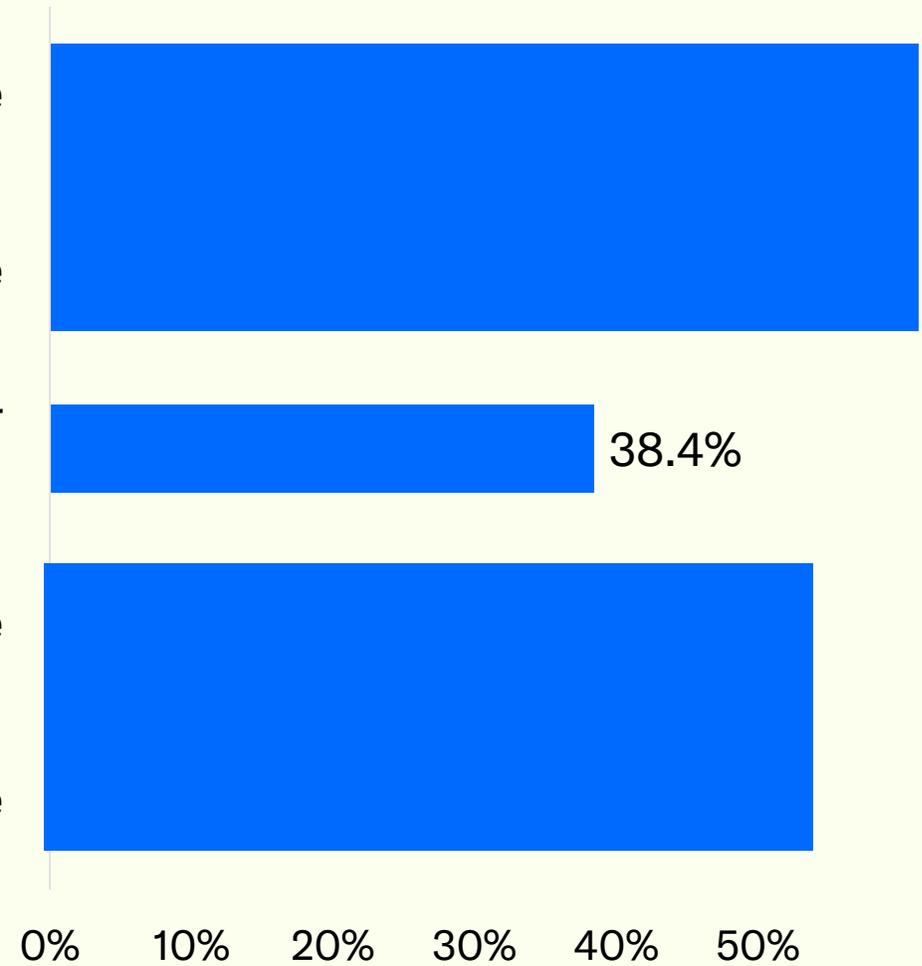
Spending Confidence Dropped This Month, But Has Been Inching Upward

Question: Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?

2022 **2023** **2024** **2025**

% Bad time or Very bad tin

50%
40%
30%
20%
10%

Jan-22 Feb-22 Mar-22 Apr-22 May-22 Jun-22 Jul-22 Aug-22 Sep-22 Oct-22 Nov-22 Dec-22 Jan-23 Feb-23 Mar-23 Apr-23 May-23 Jun-23 Jul-23 Aug-23 Sep-23 Oct-23 Nov-23 Dec-23 Jan-24 Feb-24 Mar-24 Apr-24 May-24 Jun-24 Jul-24 Aug-24 Sep-24 Oct-24 Nov-24 Dec-24 Jan-25 Feb-25 Mar-25 Apr-25 May-25 Jun-25 Jul-25 Aug-25 Sep-25 Oct-25 Nov-25 Dec-25

Future Partners

Base: All respondents, approx. 4,000 completed surveys per wave
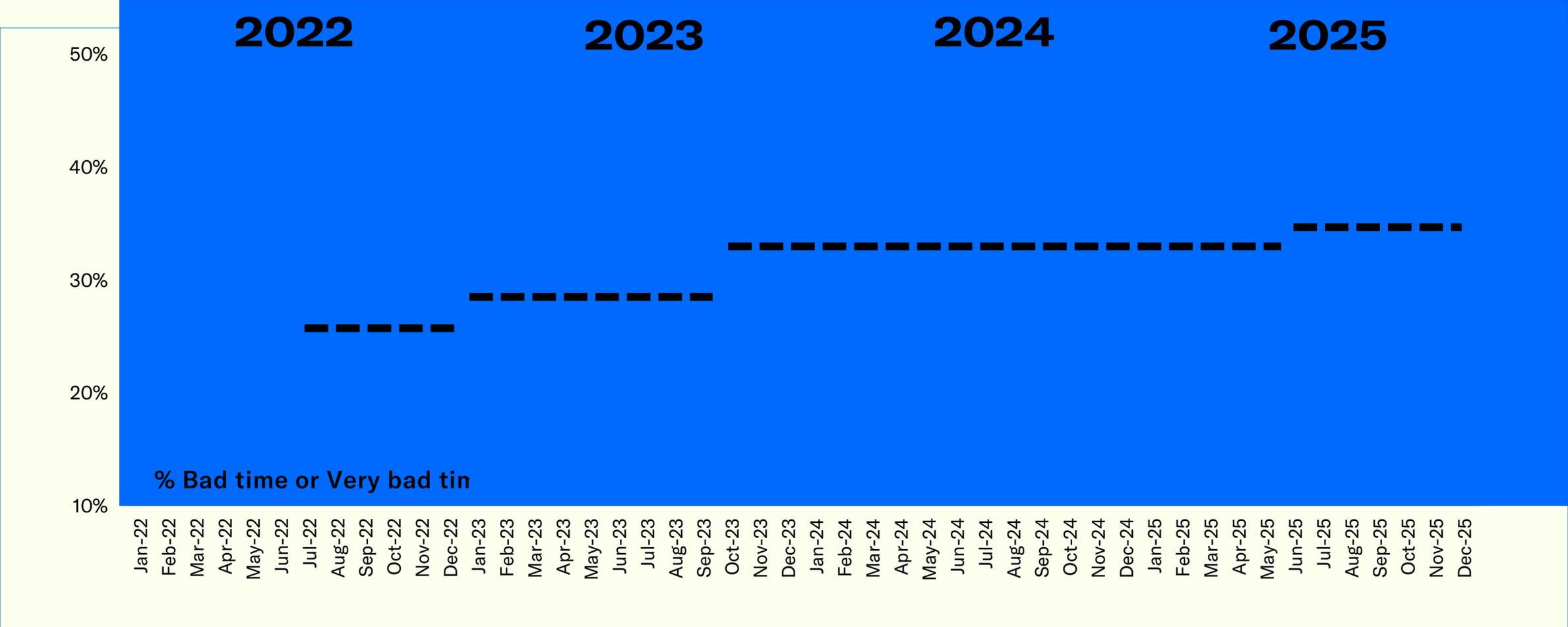
Looking Forward

Future Partners

Trip Expectations for the Upcoming Year Ticked Downward

Question:
IN TOTAL, how many leisure trips (of 50 miles or more from your home) do you expect to take in NEXT TWELVE (12) MONTHS?

Mean Dec 2025 = 3.8

Response	Percentage
10 or more	7.4%
9	0.7%
8	2.6%
7	2.7%
6	6.7%
5	8.9%
4	13.7%
3	15.1%
2	20.4%
1	13.9%
Zero	3.3%
I don't know	4.7%

Base: All respondents, 4,000 completed surveys
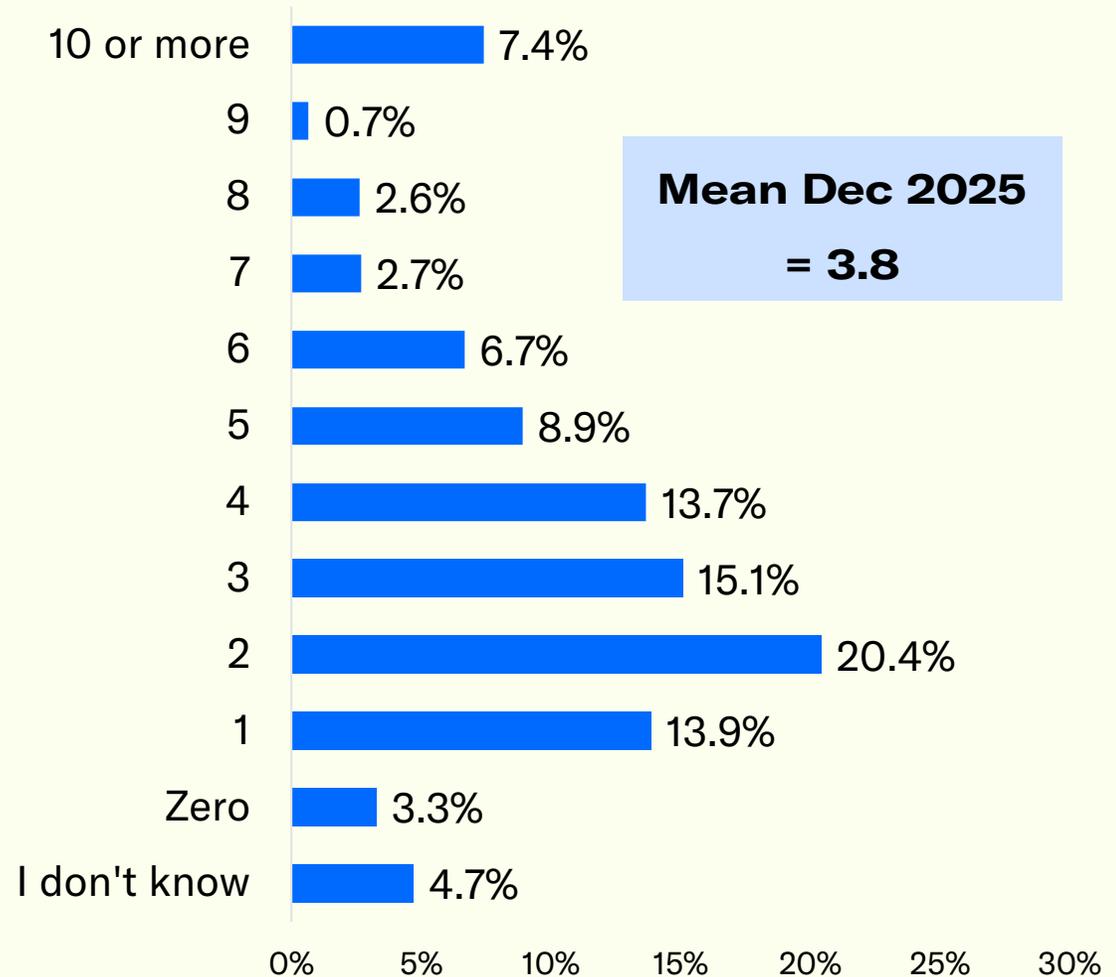
Expected Trip Volume Dropped This Month

Question: IN TOTAL, how many leisure trips (of 50 miles or more from your home) do you expect to take in NEXT TWELVE (12) MONTHS?

2022　　　　**2023**　　　　**2024**　　　　**2025**

Trips expected

Data point labels (left to right): 3.2, 3.1, 2.9, 3.0, 2.8, 2.8, 2.7, 2.9, 2.8, 3.0, 2.7, 3.2, 3.2, 3.1, 3.5, 3.6, 3.4, 3.4, 3.2, 3.2, 3.4, 3.5, 3.6, 3.5, 3.6, ..., 4.0, 3.8, 3.7, 3.5, 3.7, 3.7, 3.7, 3.8, 3.8, 4.0, 3.8
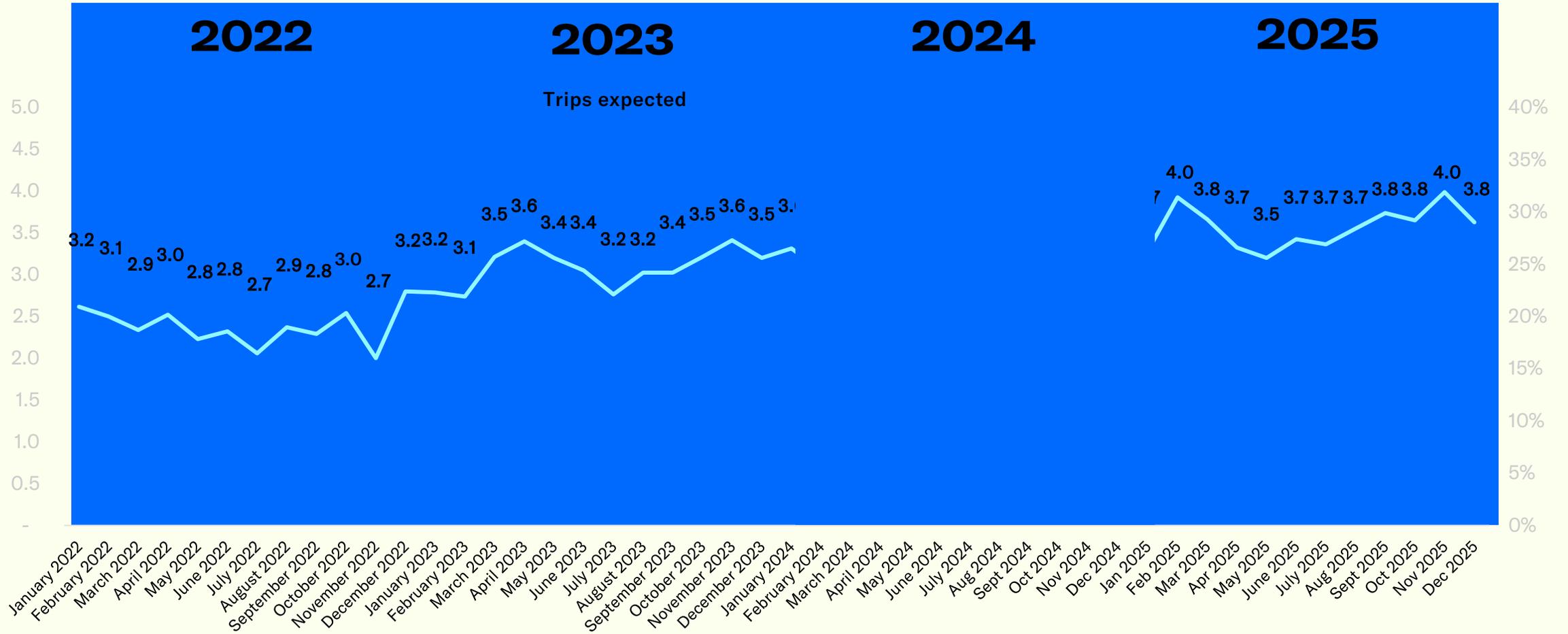
How are Americans Feeling About the Future of the US Economy?
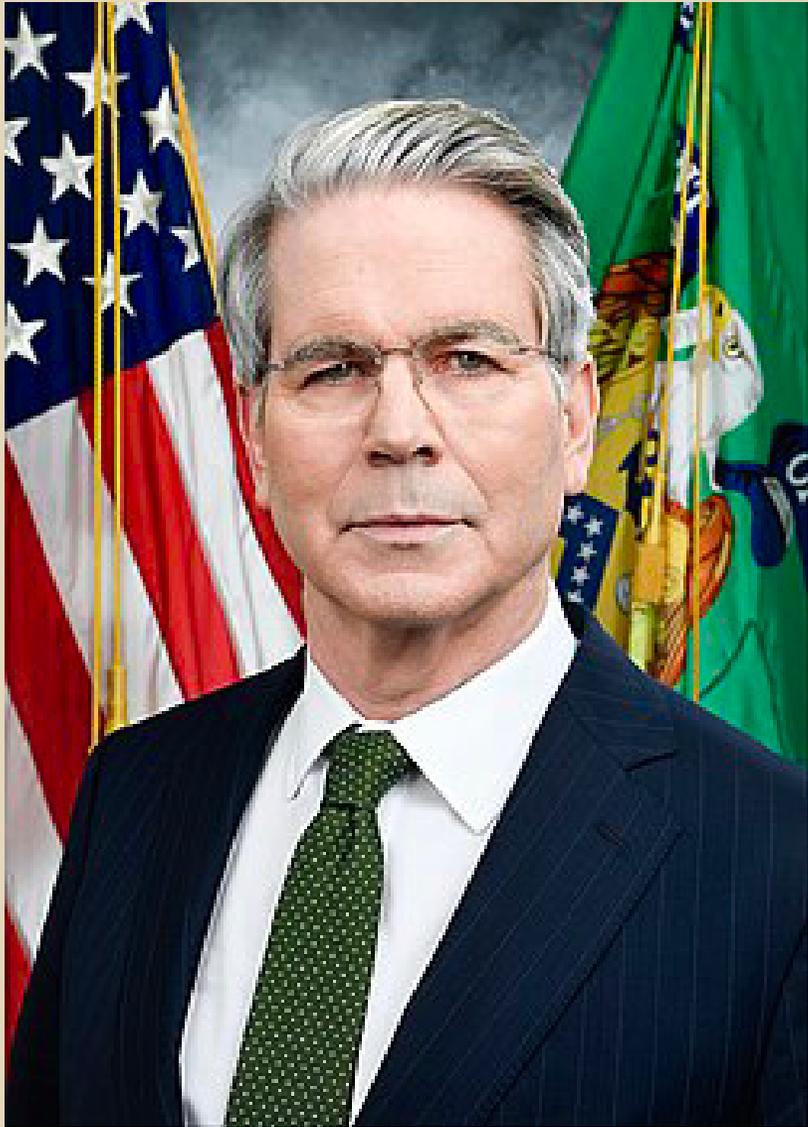
Future Partners

"The US economy, which appears OK by the most commonly used measures, is definitely not OK once you look under the hood. One essential aspect of this weirdness is the economy is strongly bifurcated...people who were already affluent are becoming more so, but the less well-off are under severe pressure."

Paul Krugman
Nobel Laureat Economist

Future Partners

American Travel Income Landscape

Question:

Which best describes the combined annual income of all members of your household?

< $80K
43.5%

> $150K
23.3%

Mean =
$115,700

$80K to
$150K
33.2%
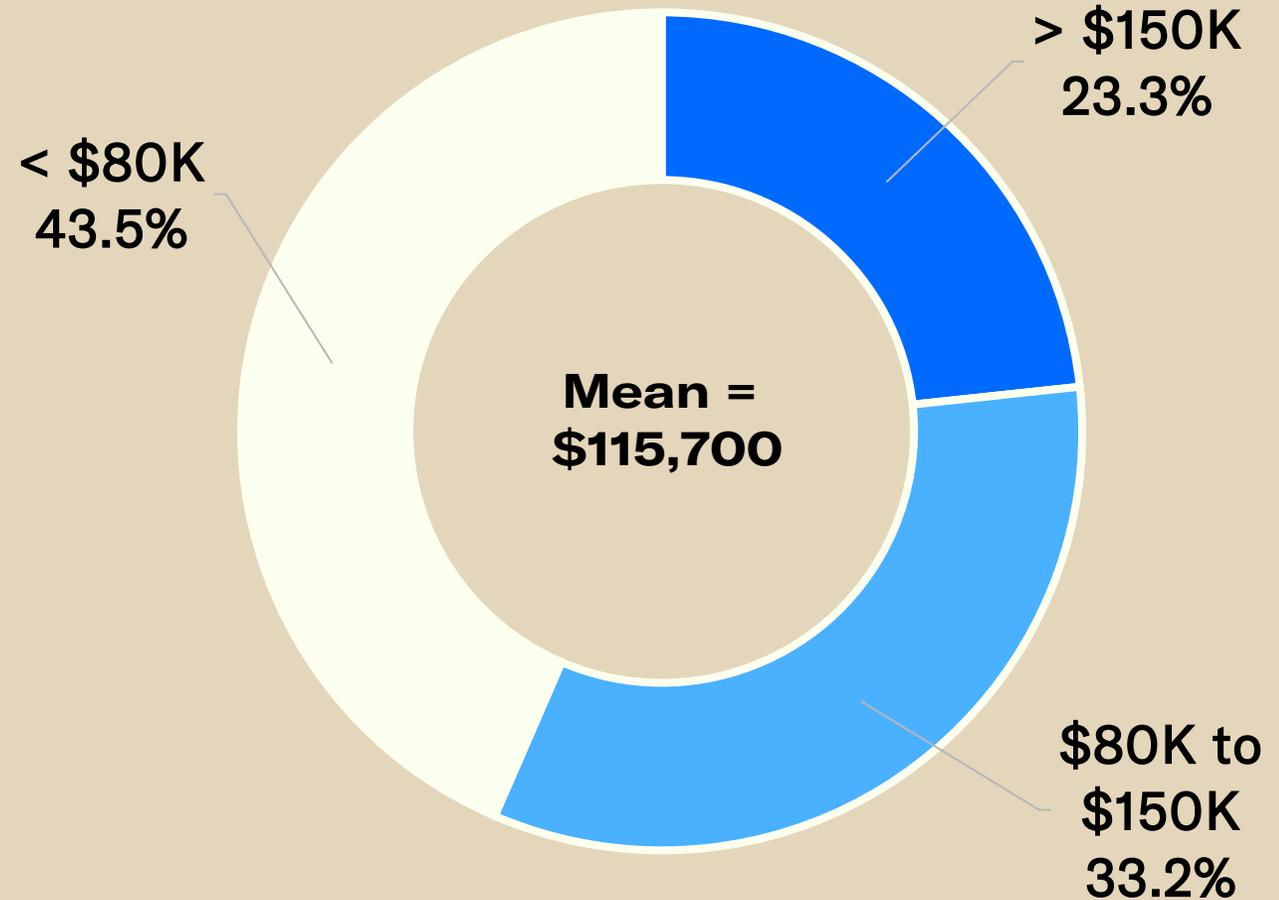
Maximum Travel Budgets Decreased in December

Question:
How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS?

Budget	Percentage
$10,000 or more	19.3%
$5,000 - $9,999	20.6%
$2,000 - $4,999	25.0%
$1,000 - $1,999	15.5%
$500 - $999	9.5%
$100 - $499	7.5%
Under $100	2.5%

Mean = $5,511
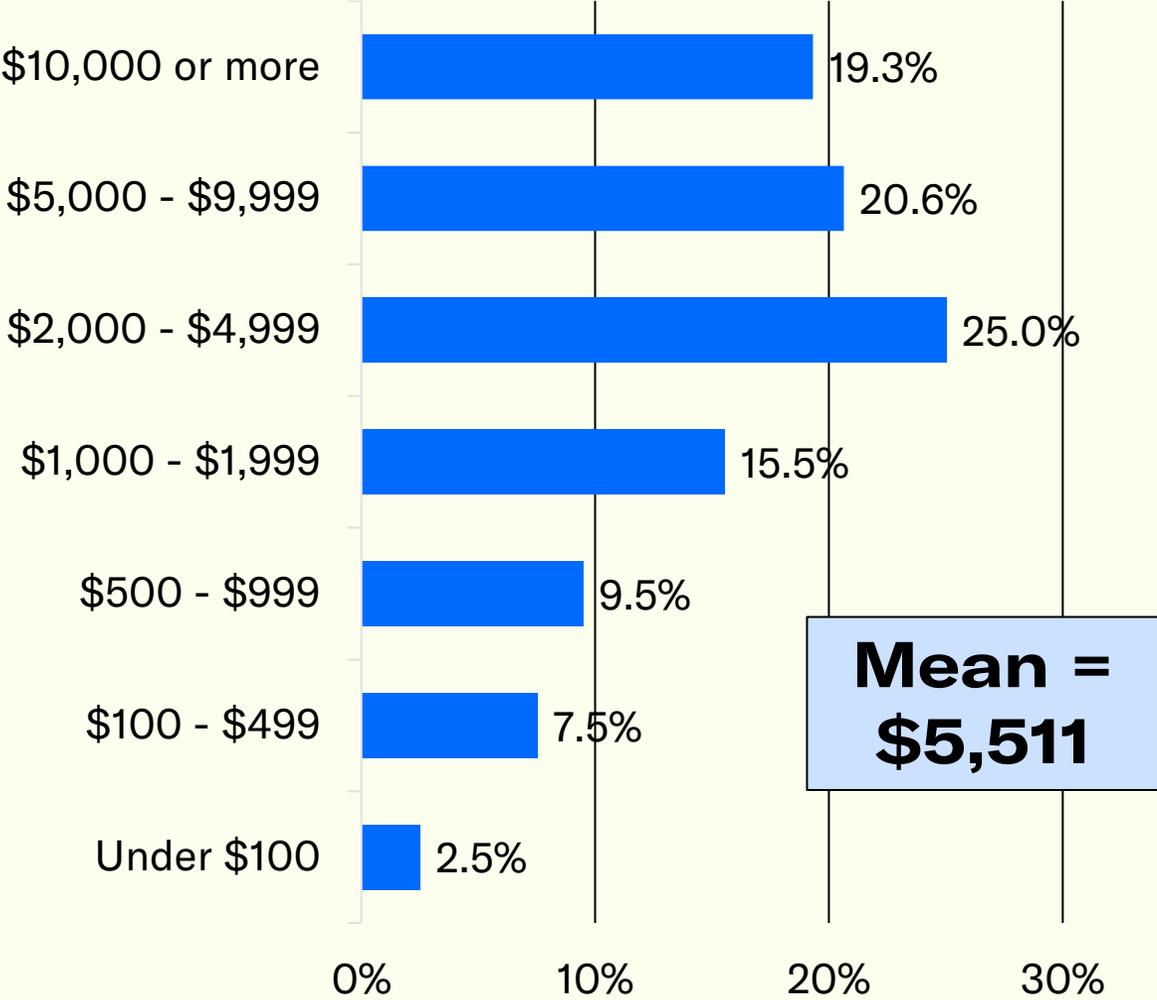
Maximum Travel Budgets Decreased

Question: How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS? Maximum I would spend on leisure travel (next 12 months):

2022   **2023**   **2024**   **2025**

Maximum Expected Annual Travel Spending (Mean)

X-axis: January 2022, February 2022, March 2022, April 2022, May 2022, June 2022, July 2022, August 2022, September 2022, October 2022, November 2022, December 2022, January 2023, February 2023, March 2023, April 2023, May 2023, June 2023, July 2023, August 2023, September 2023, October 2023, November 2023, December 2023, January 2024, February 2024, March 2024, April 2024, May 2024, June 2024, July 2024, Aug 2024, Sept 2024, Oct 2024, Nov 2024, Dec 2024, Jan 2025, Feb 2025, Mar 2025, Apr 2025, May 2025, June 2025, July 2025, Aug 2025, Sept 2025, Oct 2025, Nov 2025, Dec 2025

Y-axis: $1,000 – $8,000

Future Partners

Affluent Travelers Race Ahead in Travel Spending Growth

Question: How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS? Maximum I would spend on leisure travel (next 12 months):

Legend: High Income >$150 — Middle Income $80K - $150K — Lower Income < $80K

Mean Maximum Expected Spend

$11,299

$6,185

$2,992

X-axis: Jan-22, Feb-22, Mar-22, Apr-22, May-22, Jun-22, Jul-22, Aug-22, Sep-22, Oct-22, Nov-22, Dec-23, Feb-23, Mar-23, Apr-23, May-23, Jun-23, Jul-23, Aug-23, Sep-23, Oct-23, Nov-23, Dec-23, Jan-24, Feb-24, Mar-24, Apr-24, May-24, Jun-24, Jul-24, Aug-24, Sep-24, Oct-24, Nov-24, Dec-24, Jan-25, Feb-25, Mar-25, Apr-25, May-25, Jun-25, Jul-25, Aug-25, Sep-25, Oct-25, Nov-25, Dec-25

Base: All respondents, approx. 4,000 completed surveys per wave
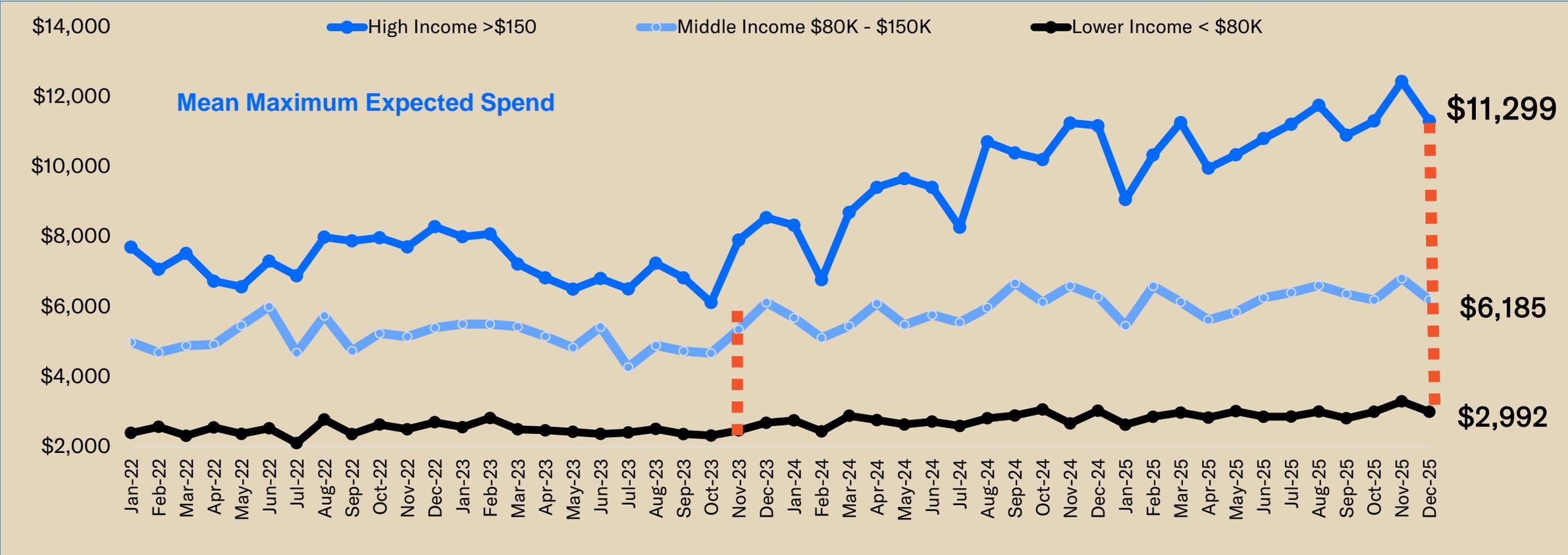
The Impact of a US Recession on Travel Sentiment

Future Partners

Recession Anxiety Softens Slightly

Statement Agreement:
I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.

Strongly agree

Agree

Neutral (neither agree nor disagree) — 33.3%

Disagree

Strongly disagree

0%   10%   20%   30%   40%
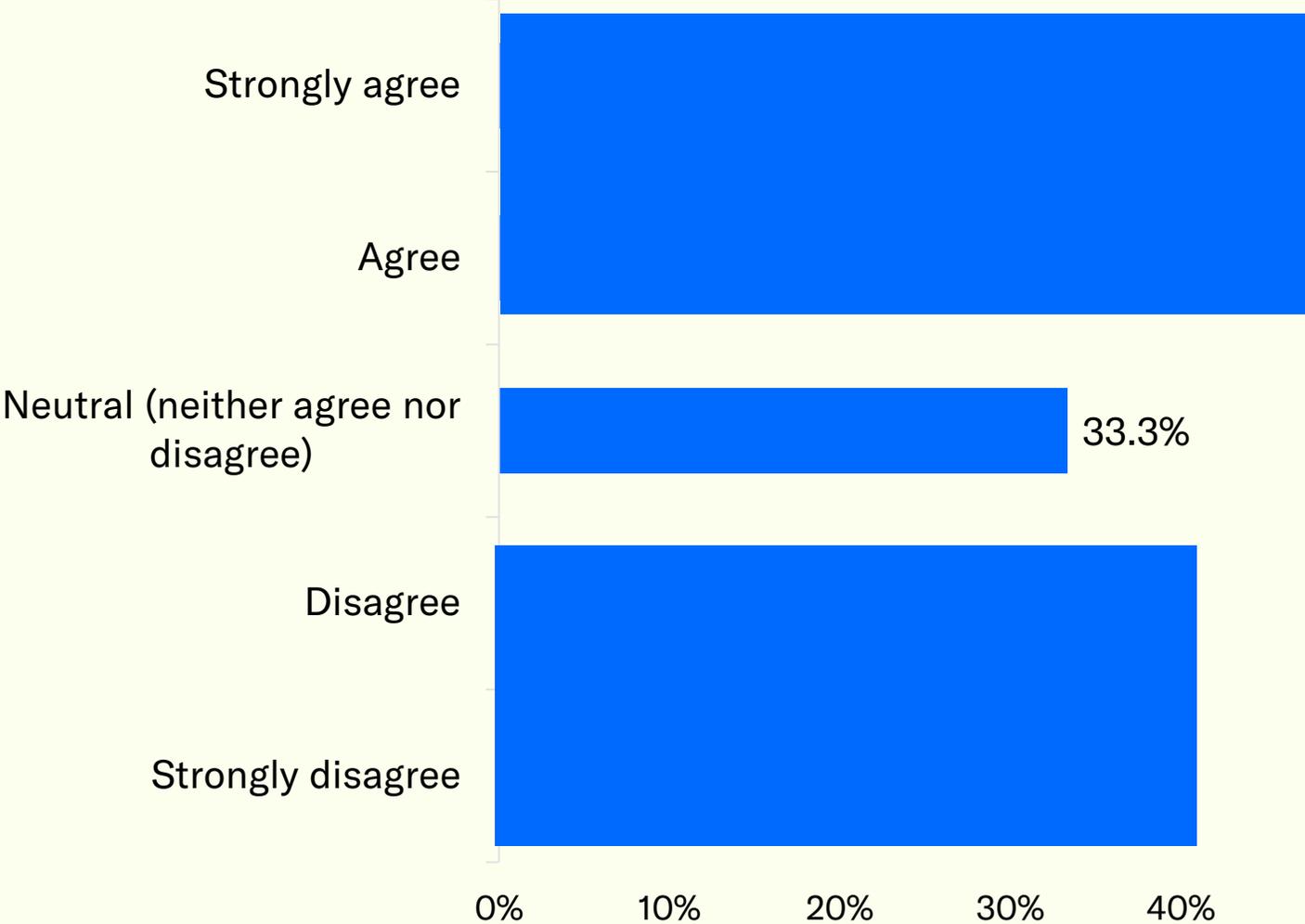
Recession Fears Remain Elevated—
but Are No Longer Escalating

Statement Agreement: I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.

2022   **2023**   **2024**   **2025**

% Agree

September 2022, October 2022, November 2022, December 2022, January 2023, February 2023, March 2023, April 2023, May 2023, June 2023, July 2023, August 2023, September 2023, October 2023, November 2023, December 2023, January 2024, February 2024, March 2024, April 2024, May 2024, June 2024, July 2024, Aug 2024, Sept 2024, Oct 2024, Nov 2024, Dec 2024, Jan 2025, Feb 2025, Mar 2025, April 2025, May 2025, June 2025, July 2025, Aug 2025, Sept 2025, Oct 2025, Nov 2025, Dec 2025
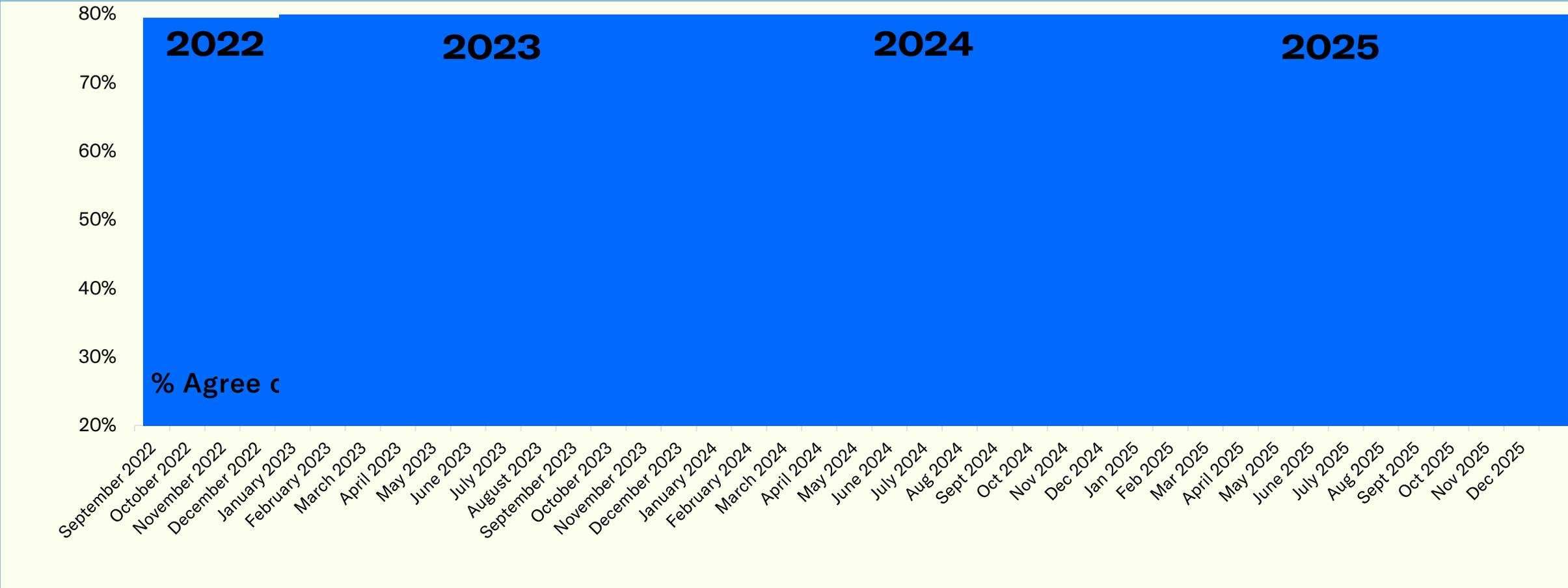
All Income Levels Share Similar Recessionary Concerns

Statement: I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.

Legend: High Income >$150 — Middle Income $80K - $150K — Lower Income < $80K

% Agree or Strongly agree

50.2%
47.2%
46.9%

Base: All respondents, approx. 4,000 completed surveys per wave
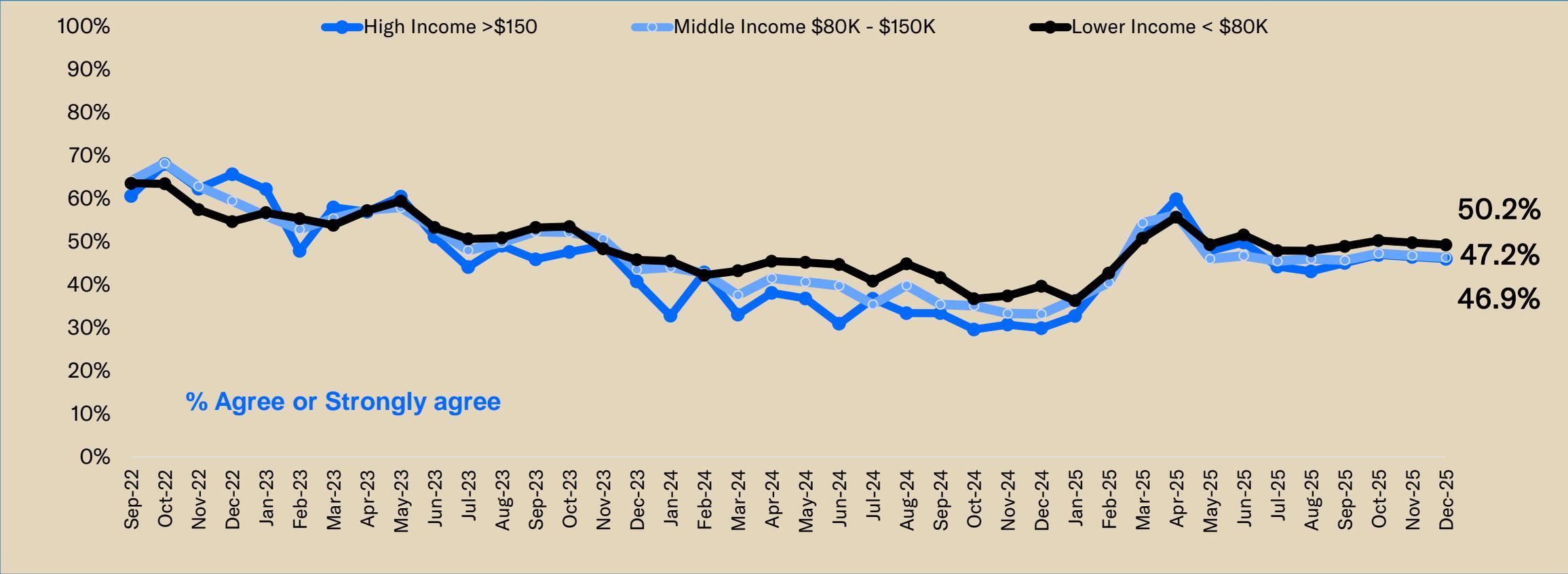
Recession Jitters Lead to More Careful Travel Spending

Question:

Right now, I am being careful with my money because I'm concerned about an upcoming recession.

30.7%
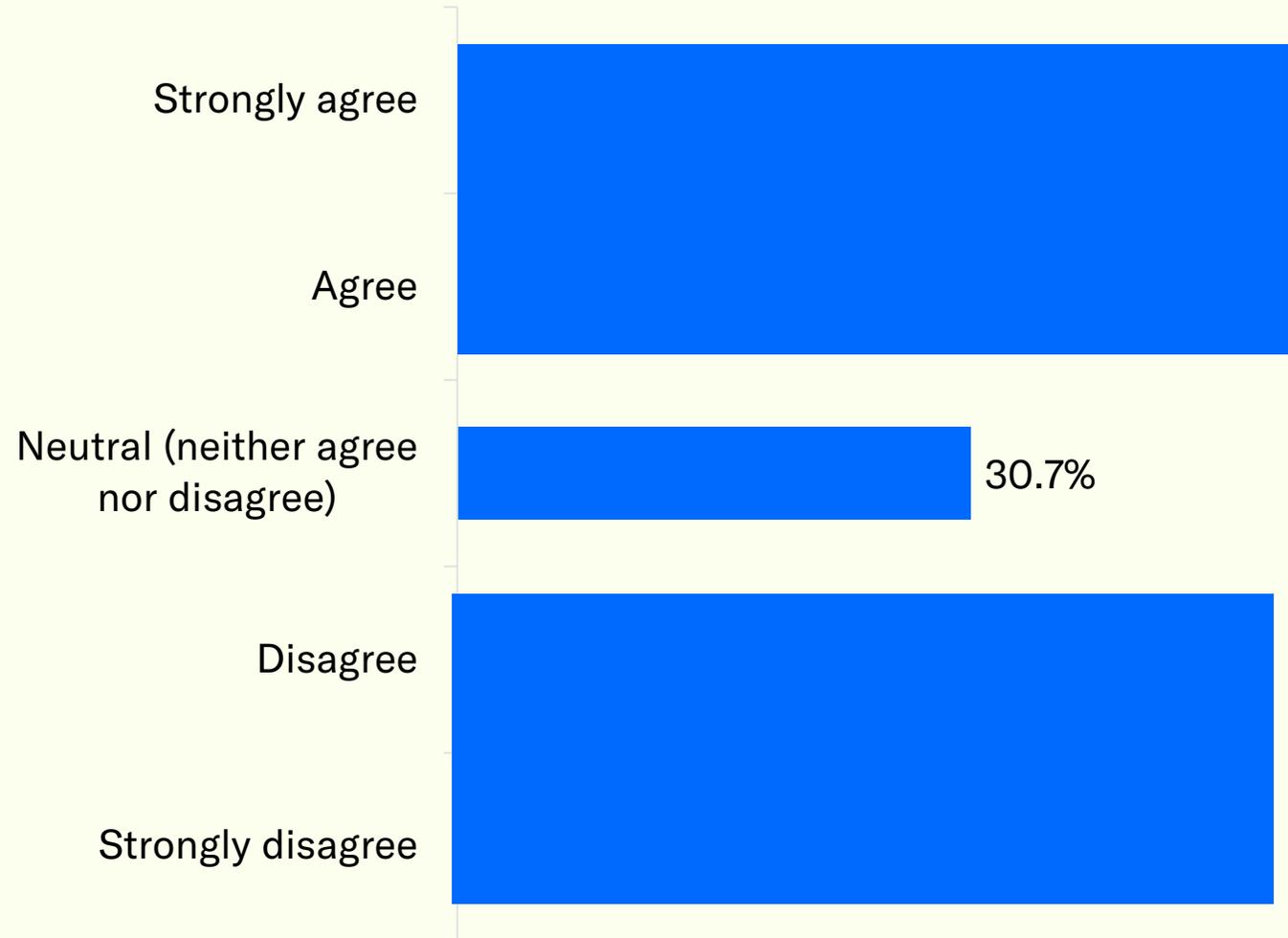
Spending Restraint Strongest Among Travelers of Modest Means

Statement: Right now, I am being careful with my money because I'm concerned about an upcoming recession.

Legend: High Income >$150 — Middle Income $80K - $150K — Lower Income < $80K

60.8%
46.9%
38.2%

% Agree or Strongly agree

X-axis: Apr-25, May-25, Jun-25, Jul-25, Aug-25, Sep-25, Oct-25, Nov-25, Dec-25

Y-axis: 20%, 30%, 40%, 50%, 60%, 70%

Future Partners

Base: All respondents, approx. 4,000 completed surveys per wave
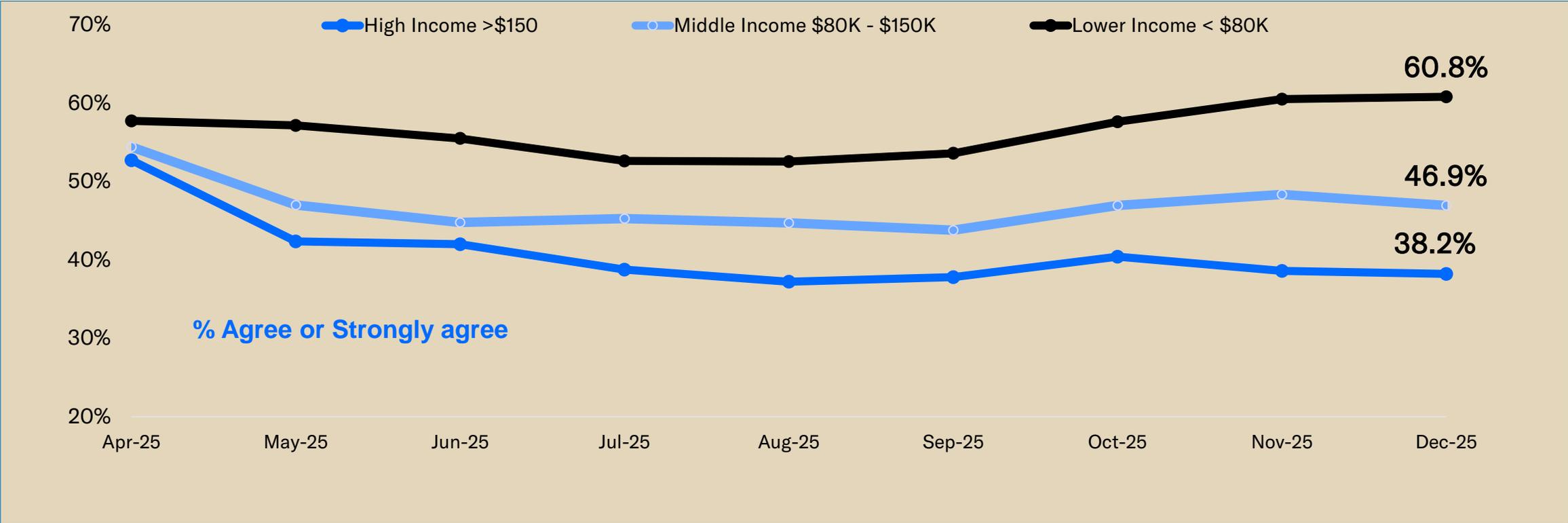
56% Say Travel Is a Worthwhile Investment Even in an Economic Downturn

Question:
Even in an economic recession, I'd consider travel to be a worthwhile investment.

Strongly agree

Agree

Neutral (neither agree nor disagree) — 29.2%

Disagree

Strongly disagree

0%   10%   20%   30%   40%   50%

Base: All respondents, 4,109 completed surveys
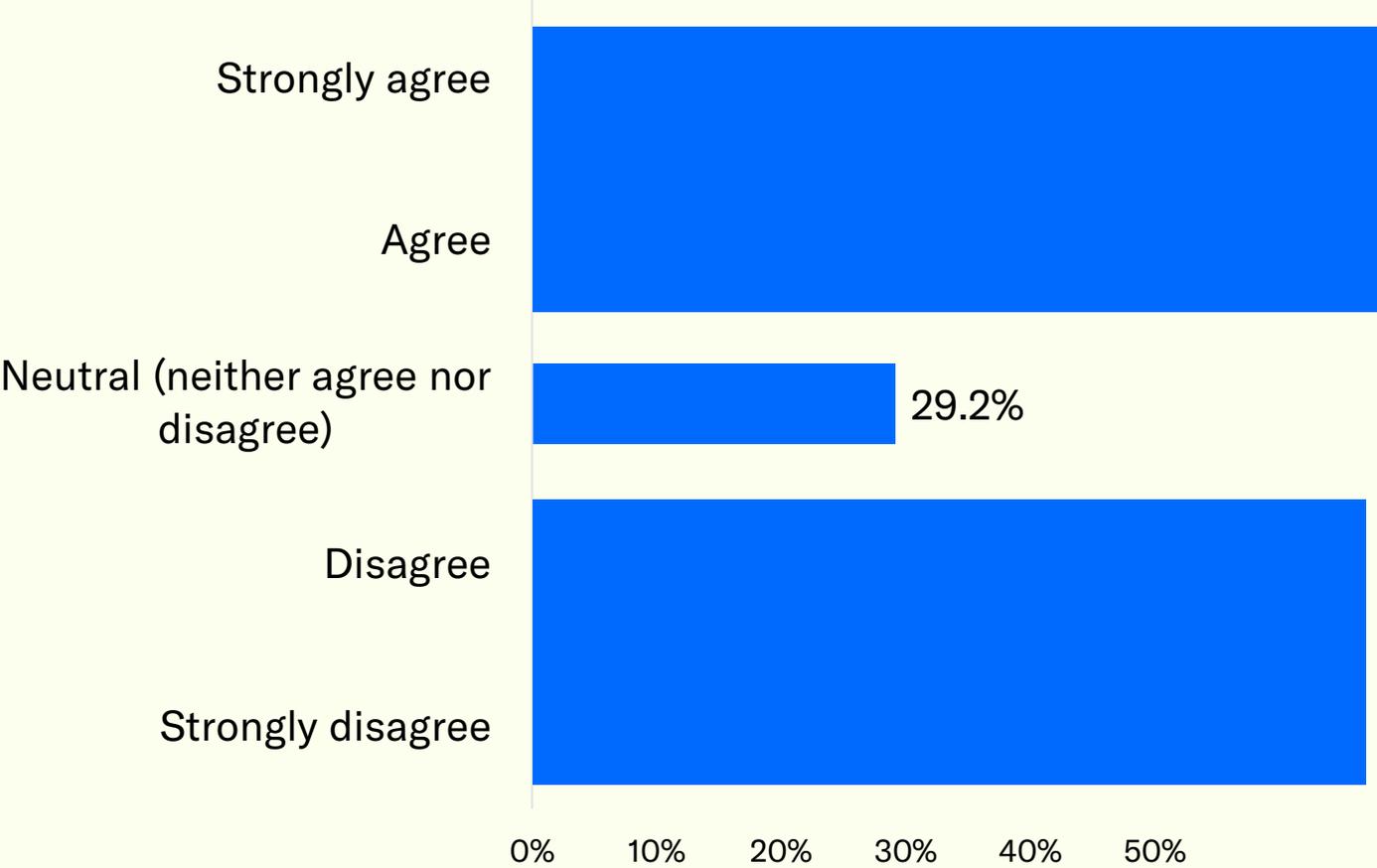
Dallas
Oriented Travelers

Future Partners

Demographics ⬈

Year: **2025**   Curated Collections: **Cities**   Filters: **Dallas, TX**
(All)   **Recent Visitors**

Gender ⬈

- ● Female — 45.0%
- ● Male — 54.7%
- ● Other — 0.3%

Generation ⬈

46.4

- ● Gen Z — 9.4%
- ● Millennials — 34.8%
- ● Gen X — 30.7%
- ● Boomers+ — 25.1%

Marital Status ⬈

- ● Married — 62.7%
- ● Single — 31.0%
- ● Domestic partner — 6.3%

Orientation ⬈

- ● LGBTQIA+ — 6.1%
- ● Heterosexual — 93.2%
- ● Other — 0.7%

Accessibility ⬈

- ● Accessibility needs — 13.6%
- ● No needs — 86.4%

Ethnicity/Race ⬈

- White — 72.3%
- Black/African-American — 12.6%
- Hispanic/Latino — 6.2%
- Asian — 5.3%
- American Indian/Native Alaskan — 0.9%
- Native Hawaiian/Pacific Islander — 0.2%

Household Income ⬈

Average	$142,456

- Less than $50k — 15.4%
- $50k-$99k — 28.6%
- $100k-$149k — 22.1%
- $150k or more — 33.9%

Education ⬈

- Completed graduate degree — 36.9%
- Some graduate school — 4.7%
- College graduate — 31.5%
- Some college — 16.5%
- High school graduate — 9.9%
- Some high school or less — 0.5%

Origin Markets 🔗

Out-of-Market Recent Visitors to Dallas, TX (Past 12 Months)

Year
2025

Curated Collections
Cities

Filters
Dallas, TX

Out-of-Market

Recent Visitors

Top Origin Metros 🔗

Metro	Percentage
Fort Worth, TX	6.9%
New York, NY-NJ	5.9%
Houston, TX	4.9%
Los Angeles-Long Beach, CA	3.7%
Chicago, IL	3.3%
San Antonio, TX	2.5%
Phoenix-Mesa, AZ	2.5%
Austin-San Marcos, TX	2.3%
OklahomaCity, OK	2.0%
Philadelphia, PA-NJ	2.0%

Origin Map 🔗

Top Origin States 🔗

State	Percentage
Texas	24.1%
California	9.3%
New York	7.4%
Florida	6.8%
Illinois	4.0%
Oklahoma	3.4%
Pennsylvania	3.2%
Arizona	3.1%
North Carolina	3.0%
Louisiana	2.3%

Future Partners   The State of the American Traveler

Base: Out-of-Market Recent Visitors to Dallas, TX (Past 12 Months), 2025 respondents. 4,136 completed surveys.

Travel Behaviors ⬏

Recent Visitors to Dallas, TX (Past 12 Months)

Year
2025 ⌄

Curated Collections
Cities ⌄

Filters
Dallas, TX ⌄

(All) ⌄   Recent Visitors ⌄

Traveler Segments
(Past 12 Months)

✈ **Air Travelers** *Traveled by Commercial Airline* ⬏
83.3%

⚓ **Cruise Travelers** *Traveled by Commercial Cruise Line* ⬏
24.9%

🏆 **Sporting Event Travelers** *Traveled for a Sports Event* ⬏
41.7%

🎟 **Event & Festival Travelers** *Attended a Festival or Special Event* ⬏
60.0%

👪 **Family Travelers** *Parent That Travels with School-Aged Children* ⬏
39.5%

Trips Taken in the Past Two Years
(Average per Trip Type)

Total   11.6 trips

	4.2	3.1	2.8	1.6
	Leisure travel	Visiting friends or relatives	Business travel	Convention, conference or group meeting
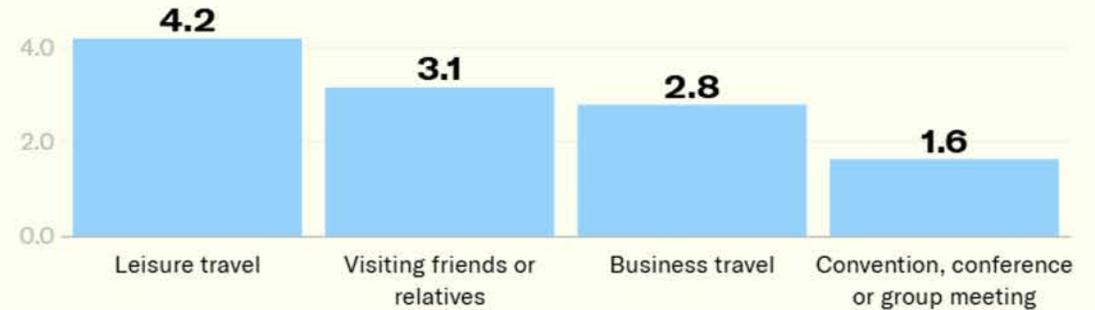
Paid Accommodations
(Overnight Stay in the Past Two Years)

Full-service or 3-4 star	72.1%
Luxury or 5-star	36.3%
Budget hotel or motel	34.1%
Peer-to-peer lodging	30.7%
Vacation home rental	18.7%

0%   20%   40%   60%   80%   100%

Base: Recent Visitors to Dallas, TX (Past 12 Months), 2025 respondents. 5,438 completed surveys.
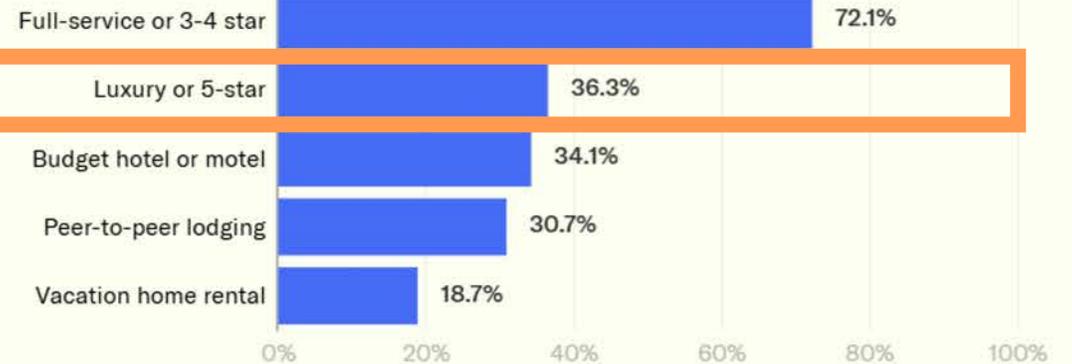
Travel Sentiment ⬈

Recent Visitors to Dallas, TX (Past 12 Months)

Year
2025 ⌄

Curated Collections
Cities ⌄

Filters
Dallas, TX ⌄

(All) ⌄   Recent Visitors ⌄

91.9% ⬈
0%   100%

🗺

Excited for Upcoming Leisure Travel
(Next 12 Months)

Most Desired Domestic Destinations ⬈

- New York: 16.3%
- Las Vegas: 15.7%
- Florida: 14.8%
- California: 10.8%
- Texas: 9.9%

10%

0%

70.7% ⬈
0%   100%

🔲

Making Travel a Financial Priority
(Next 12 Months)

Travel Expectations ⬈
(Past 12 Months vs Next 12 Months)

- ● Expect to travel more — 33.6%
- ● Expect to travel the same — 53.0%
- ● Expect to travel less — 13.5%

Most Desired International Destinations ⬈

- Italy: 19.1%
- Mexico: 14.0%
- Japan: 12.5%
- France: 12.0%
- Canada: 12.0%

20%

10%

0%

Anticipated Travel Spend ⬈
(Average Predicted Spend in the Next 12 Months)

$7,344
Anticipated Spend for Domestic Leisure Travel

Future Partners   The State of the American Traveler

Travel Inspiration Resources ⤴

Likely Visitors to Dallas, TX (Next 12 Months)

Most Effective Travel Inspiration Resources by Year

■ 2022   ■ 2023   ■ 2024   ■ 2025
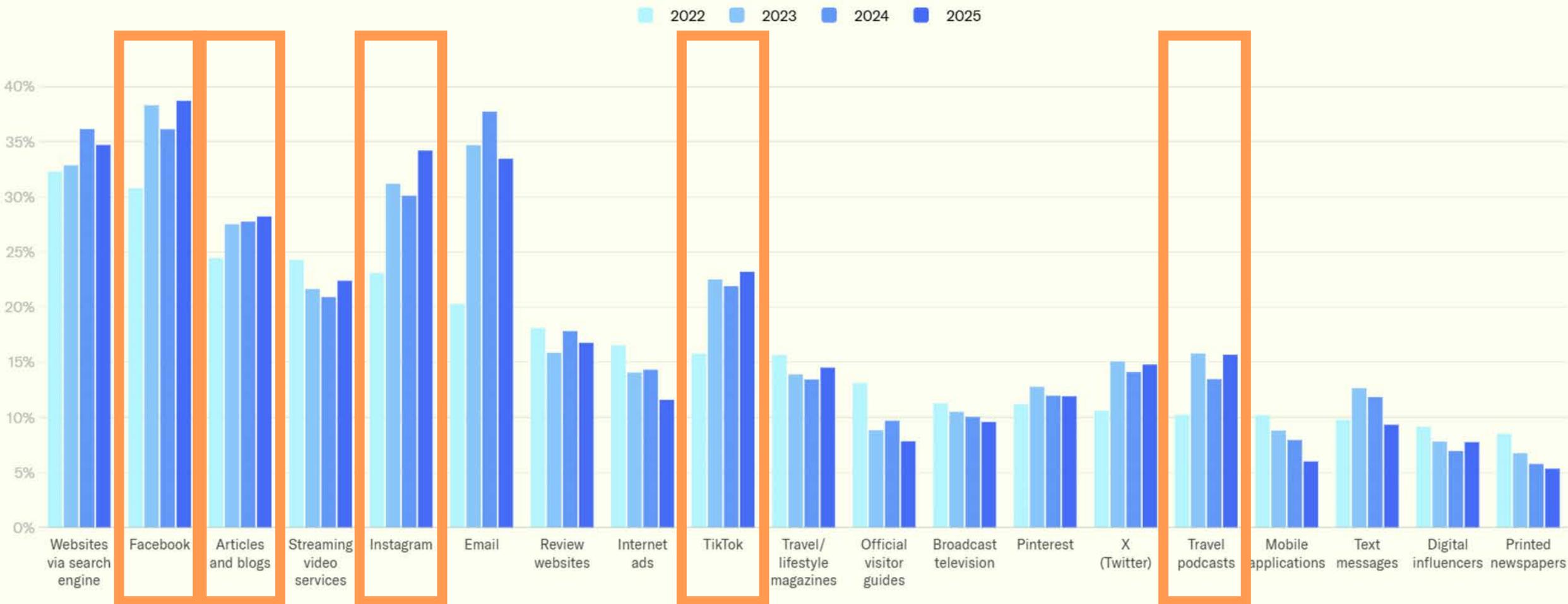
Question: Please think about how travel destinations could best reach you with their messages right now. Where would you generally be MOST RECEPTIVE to learning about new destinations to visit? (Please select all that apply)

Future Partners   The State of the American Traveler

Base: Likely Visitors to Dallas, TX (Next 12 Months). 23,353 completed surveys.

Brand Equity Index Summary

Future Partners Destination Brand Equity Index is made up of the following **six key elements**, which are considered as the important components of a brand's equity. These factors are then utilized to calculate a destination's index score on a 100-pt scale.

Awareness
The extent to which travelers are familiar with a destination as a viable place to visit.

Reputation
The overall appeal and perceived quality of the destination among travelers.

Differentiation
How unique and distinct the destination's visitation experience is compared to others.

Energy/Momentum
The perception of how much the destination's popularity has increased/decreased recently.

Relevance
The likelihood that a consumer will consider visiting the destination in the next few years.

Loyalty
The degree to which consumers have visited the destination in the past.

51.2

Dallas, TX
(-0.4pts YOY)

Competitor Rankings
(Index Ratings - Dallas, TX vs. Top Ranking Competitive Set)
Average: 50.9

Dallas, TX	Los Angeles, CA	Phoenix, AZ	Atlanta, GA	Philadelphia, PA
51.2	52.6	51.8	51.4	50.7

Barometer values indicate how each destination performs relative to the selected competitive set, with 50 representing average performance.

Future Partners   The State of the American Traveler Plus

Base: Dallas, TX set, 2025 respondents. 680 completed surveys.

Destination Attributes - Destination vs. Competitive Set
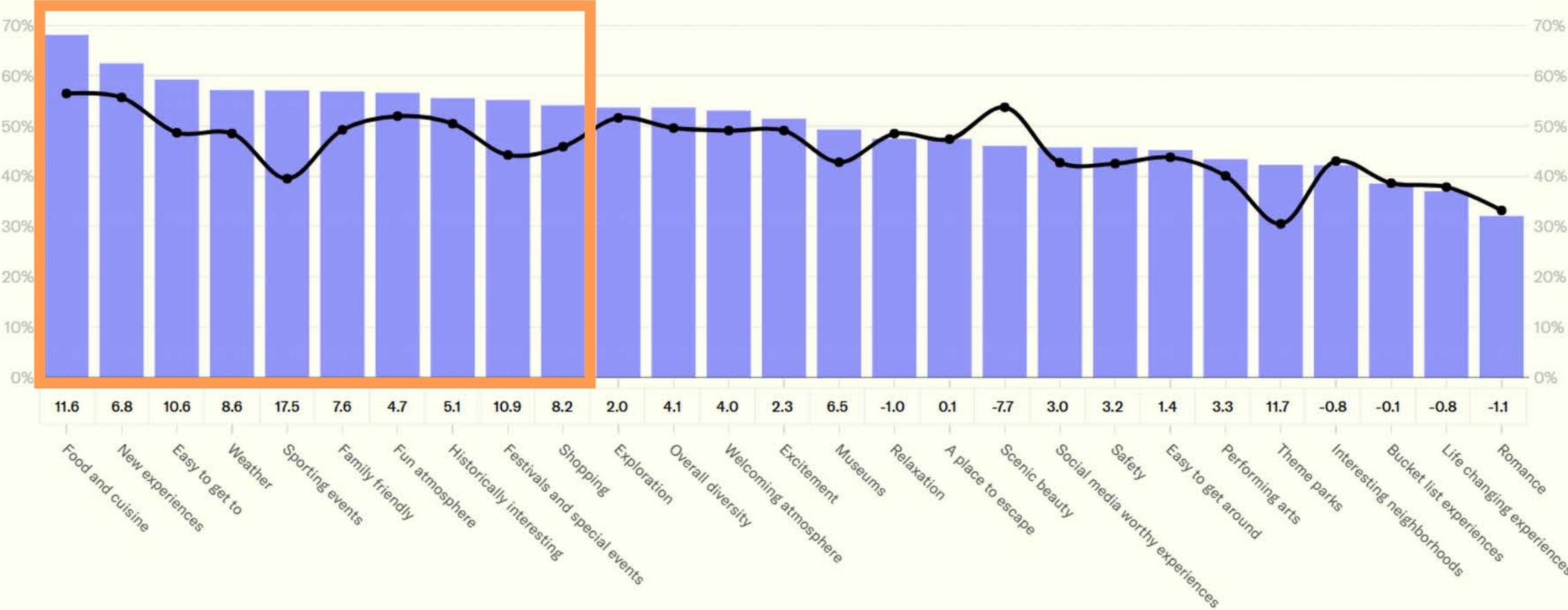
Year
2025

Destination Type
Cities

Destination
Dallas, TX

Competitive Set
(All)

Destination Attribute Ratings - Dallas, TX vs. Competitive Set
(Top 2 Box - % Rating Destination as "Good" or "Extremely good" for Delivering on each Attribute)

- Dallas, TX
- Competitive Set

Attribute	Value
Food and cuisine	11.6
New experiences	6.8
Easy to get to	10.6
Weather	8.6
Sporting events	17.5
Family friendly	7.6
Fun atmosphere	4.7
Historically interesting	5.1
Festivals and special events	10.9
Shopping	8.2
Exploration	2.0
Overall diversity	4.1
Welcoming atmosphere	4.0
Excitement	2.3
Museums	6.5
Relaxation	-1.0
A place to escape	0.1
Scenic beauty	-7.7
Social media worthy experiences	3.0
Safety	3.2
Easy to get around	1.4
Performing arts	3.3
Theme parks	11.7
Interesting neighborhoods	-0.8
Bucket list experiences	-0.1
Life changing experiences	-0.8
Romance	-1.1

Future Partners   The State of the American Traveler Plus

Base: Dallas, TX set, 2025 respondents. 680 completed surveys.

The Future of the Meetings Industry

- Online survey methodology

- Screening requirements:

  - Professional meeting and event planner

  - Has decision making authority on where to host their organization/clients' group meetings

- Field dates: September 8th through October 3rd, 2025

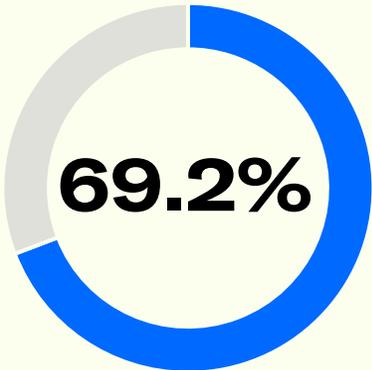 - 1,499 completed surveys

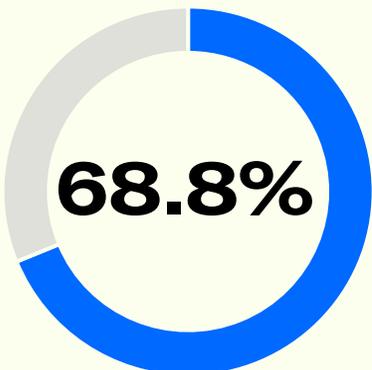 - Ten (10) 60-minute in-depth interviews

Future Partners

Destination Attribute Importance

Top 5 Destination Attributes for In-Person Meetings
% High or Extremely High Importance

69.2%
Technology
Set-up
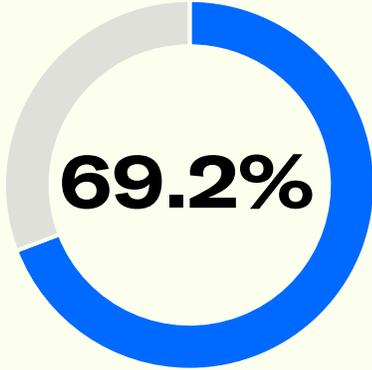
69.2%
Overall Quality
of Meeting
Facilities

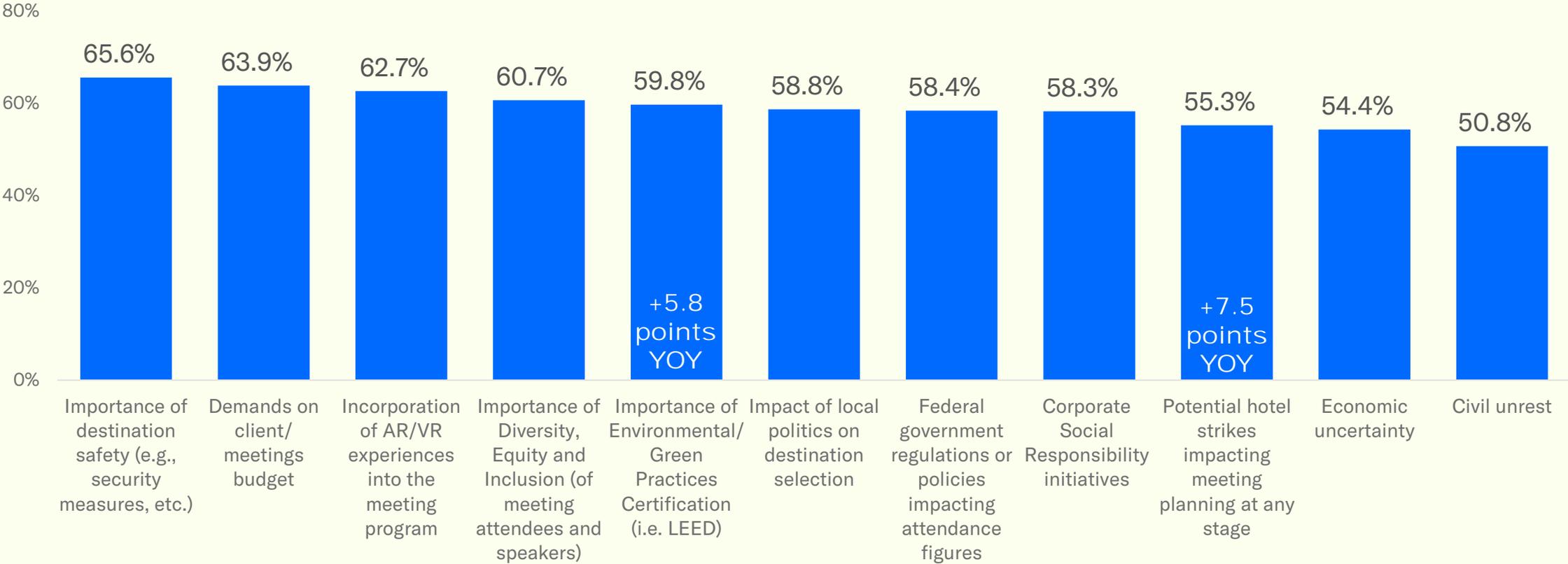**68.8%**
Destination
Safety
Certification
Programs
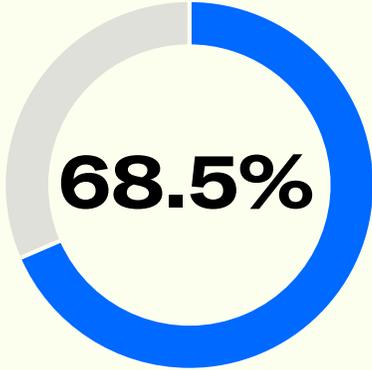
68.5%
Safe
Environment
(Personal Safety)
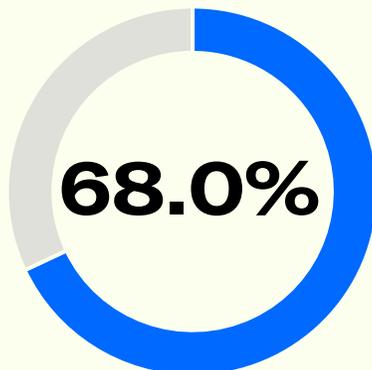
68.0%
Geographic
Location

Anticipated Changes to the Meetings Industry

% Expect to Increase

Category	%
Importance of destination safety (e.g., security measures, etc.)	65.6%
Demands on client/meetings budget	63.9%
Incorporation of AR/VR experiences into the meeting program	62.7%
Importance of Diversity, Equity and Inclusion (of meeting attendees and speakers)	60.7%
Importance of Environmental/Green Practices Certification (i.e. LEED)	59.8% (+5.8 points YOY)
Impact of local politics on destination selection	58.8%
Federal government regulations or policies impacting attendance figures	58.4%
Corporate Social Responsibility initiatives	58.3%
Potential hotel strikes impacting meeting planning at any stage	55.3% (+7.5 points YOY)
Economic uncertainty	54.4%
Civil unrest	50.8%

Redefining 'Safe' to Mean 'Welcoming'

Safety is no longer just about crime statistics. It is a dual mandate.

Pillar 1: Physical Security

- Visible safety measures
- Clean environments
- Crime statistics

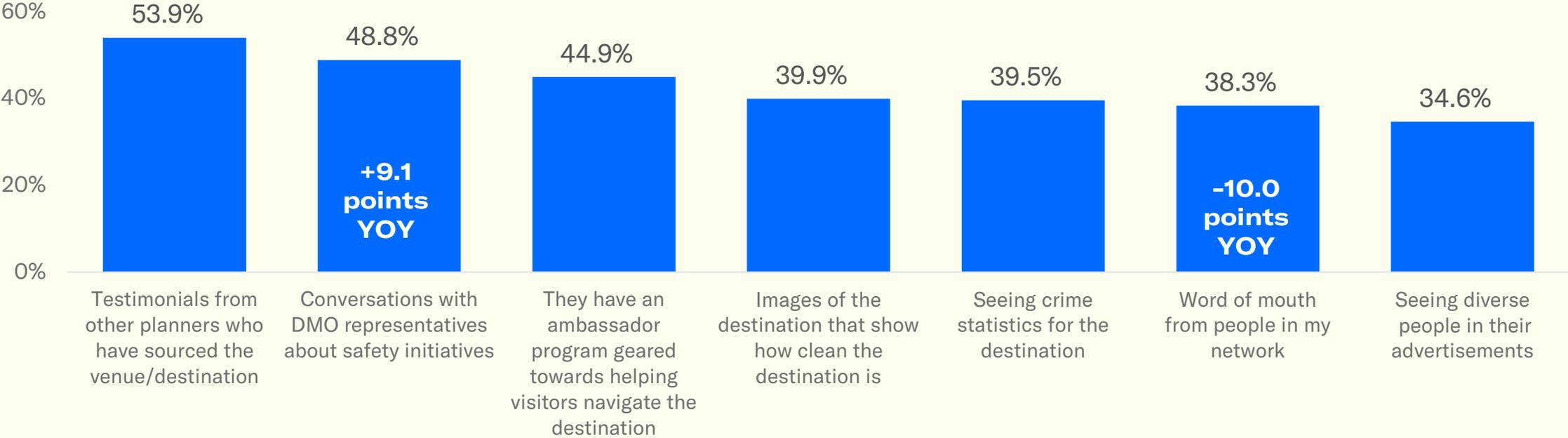**6-in-10** planners say destination safety initiatives are crucial to their decision.

Pillar 2: Inclusivity & Welcome

- Friendly to diverse viewpoints
- Safe for diverse populations
- Inclusive legislation/policies

"I want to make sure that everyone feels comfortable coming to our events... choosing cities that are going to be more friendly to various viewpoints and different people."

Communicating that a Destination is Safe

Which of the following helps communicate that a destination is a safe place for meetings? (Select your top 3)

53.9%	Testimonials from other planners who have sourced the venue/destination
48.8% (+9.1 points YOY)	Conversations with DMO representatives about safety initiatives
44.9%	They have an ambassador program geared towards helping visitors navigate the destination
39.9%	Images of the destination that show how clean the destination is
39.5%	Seeing crime statistics for the destination
38.3% (-10.0 points YOY)	Word of mouth from people in my network
34.6%	Seeing diverse people in their advertisements

"We see **hybrid meeting technologies**, **AI-driven personalization**, and **immersive tools** like AR/VR as having the biggest impact on the meetings industry. These trends will enable **more inclusive participation** and **improve engagement**."

- Third-party meeting planner

AI as a Tool for Destination Inspiration

69.6%
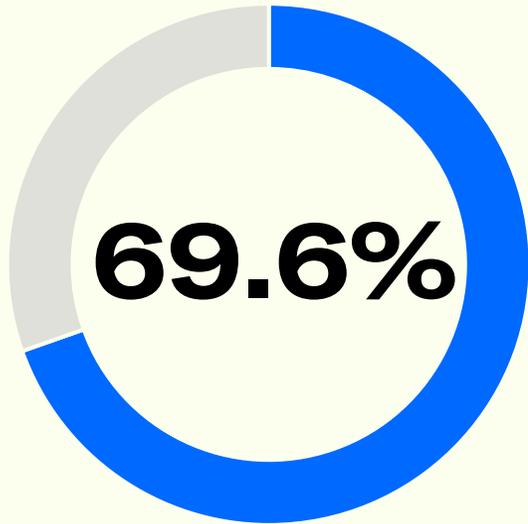
Of planners agree that they often use AI tools like ChatGPT to source meetings destinations.

Top 10 AI Use Cases for Inspiration around Meetings Destinations (unaided)

Use Case	Percentage
Planning & logistics	34.0%
Team-building & activities	26.9%
Destination shortlists	26.0%
Idea generation & visualization	22.6%
Location suitability	17.2%
Market analysis & competitive insights	15.8%
Hidden gem discovery	14.4%
Venue, amenities, & locations comparison	11.9%
Ideas / inspiration / research	11.5%
Attendee experience & engagement	10.6%

AI Does Not Replace the DMO

Counter-Intuitive Finding: Planners using AI are *more* likely to rate DMO services as important.

92.3%

Satisfaction rate among planners who worked with a DMO/CVB.

Planners view the DMO as the 'Bridge' connecting them to local resources, authentic experiences, and government liaisons that AI cannot access.

AI

Local Resources

Authentic Experiences

Government Liaisons

Comparing AI Users vs. Non-AI Users: Planners using AI tools rate most DMO services, such as transportation sourcing and local expertise, as *more* important.

The Rise of Secondary Cities & 'New' Experiences

80.6%
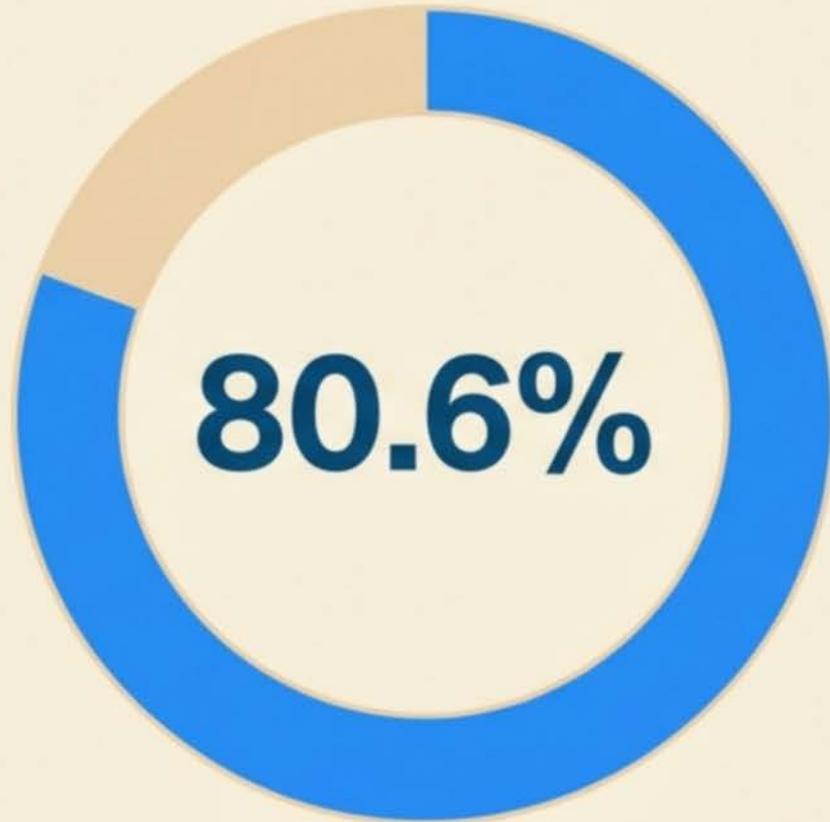
Planners agree 2nd and 3rd tier destinations are growing in popularity.

The Drivers of Growth

- **1. Cost Efficiencies**
  (Better rates than top-tier metros)

- **2. Safety Perceptions**
  (Perceived as more controlled)

- **3. New Experiences**
  (Attendees craving 'fresh' locations)

Experience Over Logistics

The destination is the venue. Planners want transformative experiences, not just four walls.

The Old Way: Convention Centers

The New Desire: Experiences
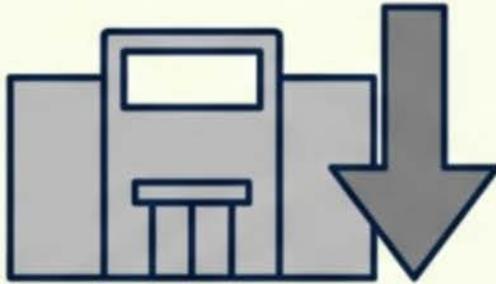
64.5%

Agree convention centers are **falling out of favor** due to attendee fatigue.

71.6%

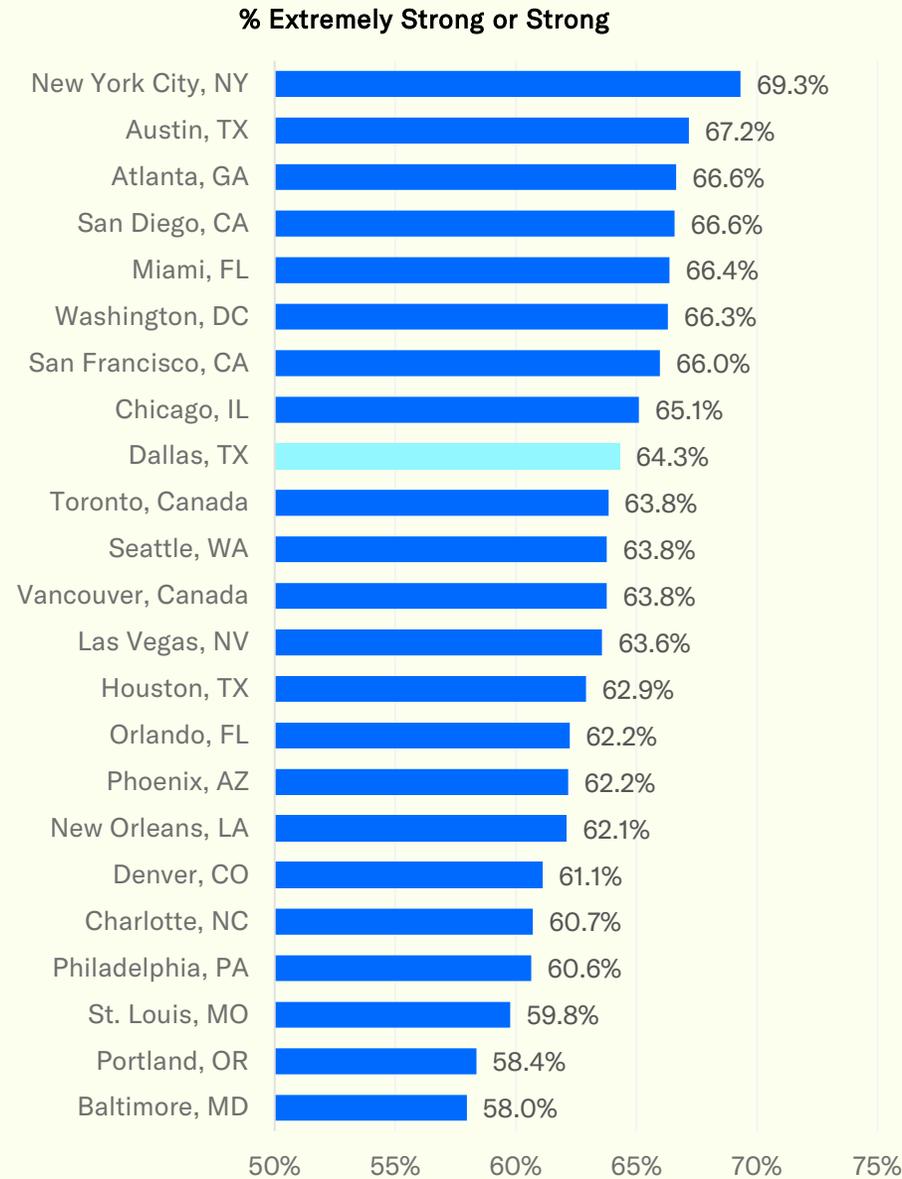Are looking for **alternatives** to traditional **Food & Beverage** offerings.

Dallas
Destination Ratings

Future Partners
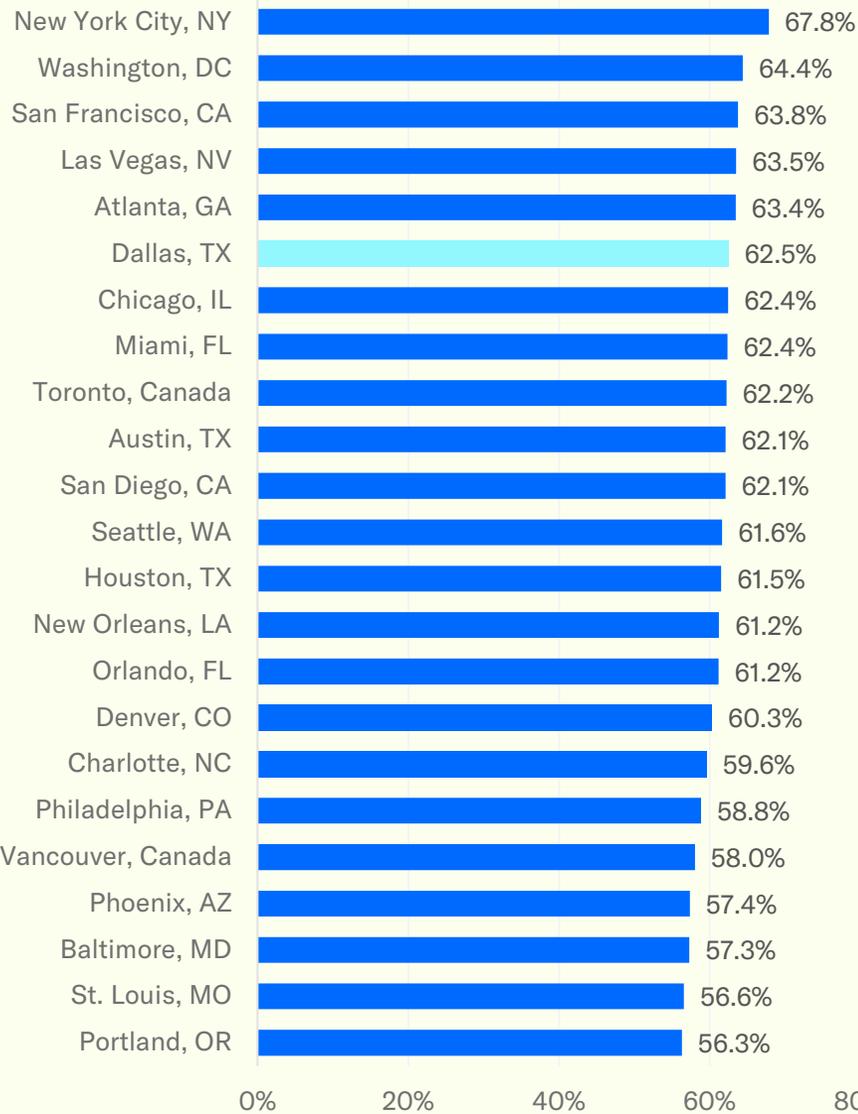
Strong Overall Reputation as a Meeting Destination

% Extremely Strong or Strong

New York City, NY		69.3%
Austin, TX		67.2%
Atlanta, GA		66.6%
San Diego, CA		66.6%
Miami, FL		66.4%
Washington, DC		66.3%
San Francisco, CA		66.0%
Chicago, IL		65.1%
Dallas, TX		64.3%
Toronto, Canada		63.8%
Seattle, WA		63.8%
Vancouver, Canada		63.8%
Las Vegas, NV		63.6%
Houston, TX		62.9%
Orlando, FL		62.2%
Phoenix, AZ		62.2%
New Orleans, LA		62.1%
Denver, CO		61.1%
Charlotte, NC		60.7%
Philadelphia, PA		60.6%
St. Louis, MO		59.8%
Portland, OR		58.4%
Baltimore, MD		58.0%

	Corporate	Association	Third Party	Sports/ Athletics	SMERF
New York City, NY	70.9%	65.3%	71.6%	69.9%	69.2%
Austin, TX	68.8%	64.9%	68.3%	70.0%	67.4%
Atlanta, GA	67.1%	63.9%	67.9%	69.0%	66.5%
San Diego, CA	67.9%	62.1%	68.5%	66.6%	67.1%
Miami, FL	65.6%	65.3%	70.0%	68.1%	67.5%
Washington, DC	65.6%	66.1%	68.3%	65.4%	65.4%
San Francisco, CA	71.1%	61.6%	66.2%	68.6%	66.4%
Chicago, IL	65.6%	63.6%	66.4%	65.2%	64.8%
Dallas, TX	69.2%	62.6%	63.0%	64.9%	63.7%
Toronto, Canada	67.5%	58.9%	65.1%	65.6%	63.9%
Seattle, WA	63.9%	64.9%	63.2%	67.2%	63.4%
Vancouver, Canada	65.6%	62.6%	63.9%	65.8%	63.5%
Las Vegas, NV	65.0%	60.6%	64.5%	65.8%	64.2%
Houston, TX	66.7%	61.1%	62.2%	65.6%	63.3%
Orlando, FL	65.0%	59.7%	62.6%	63.5%	61.3%
Phoenix, AZ	65.2%	57.9%	62.8%	65.2%	61.4%
New Orleans, LA	64.8%	59.4%	62.4%	63.3%	60.9%
Denver, CO	61.0%	58.9%	63.2%	65.2%	61.6%
Charlotte, NC	61.6%	59.9%	62.0%	65.6%	61.5%
Philadelphia, PA	59.5%	58.7%	63.2%	63.3%	63.1%
St. Louis, MO	56.8%	58.4%	61.6%	65.2%	61.9%
Portland, OR	57.2%	56.7%	60.9%	62.6%	60.5%
Baltimore, MD	55.3%	59.7%	58.8%	60.8%	59.7%
Base	**474**	**404**	**476**	**781**	**991**

Strong overall reputation as a meetings destination. Base: All respondents. 1,499 responses.

Positive Change in Popularity with Attendees
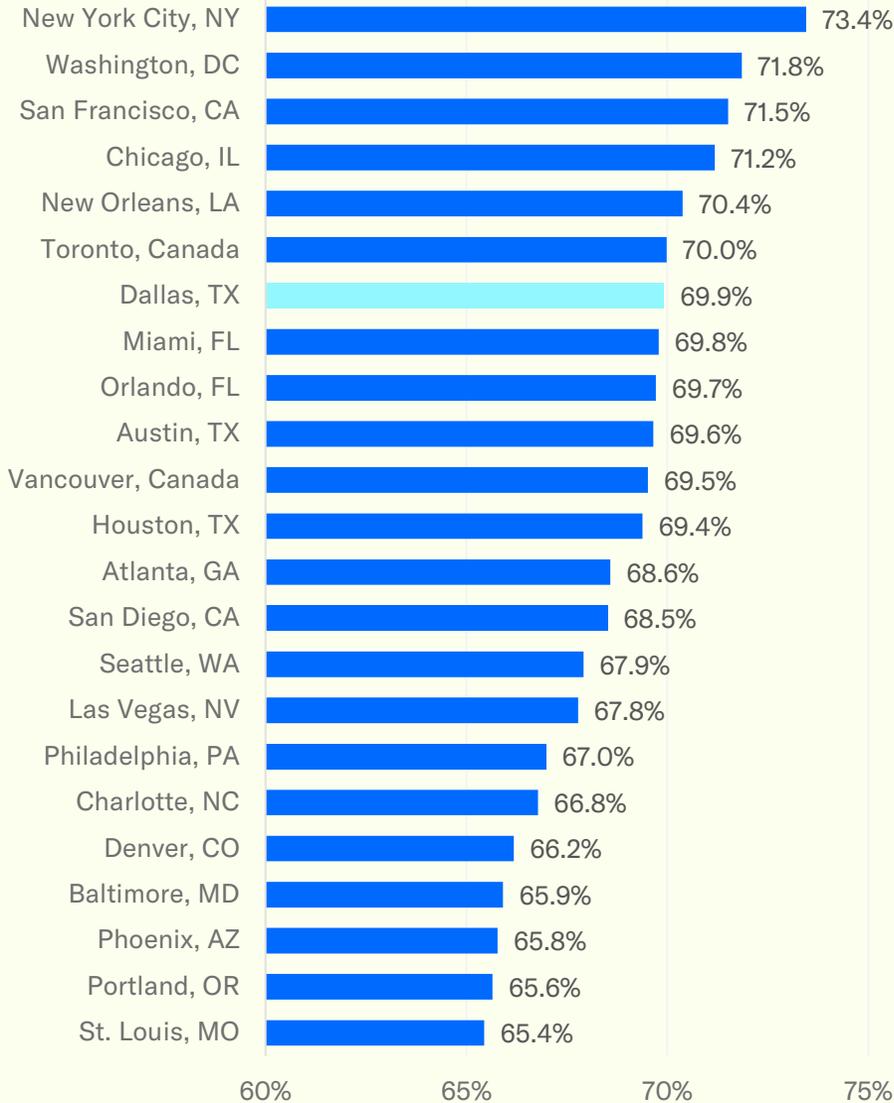
% Increased A Lot or Somewhat

City	%
New York City, NY	67.8%
Washington, DC	64.4%
San Francisco, CA	63.8%
Las Vegas, NV	63.5%
Atlanta, GA	63.4%
Dallas, TX	62.5%
Chicago, IL	62.4%
Miami, FL	62.4%
Toronto, Canada	62.2%
Austin, TX	62.1%
San Diego, CA	62.1%
Seattle, WA	61.6%
Houston, TX	61.5%
New Orleans, LA	61.2%
Orlando, FL	61.2%
Denver, CO	60.3%
Charlotte, NC	59.6%
Philadelphia, PA	58.8%
Vancouver, Canada	58.0%
Phoenix, AZ	57.4%
Baltimore, MD	57.3%
St. Louis, MO	56.6%
Portland, OR	56.3%

	Corporate	Association	Third Party	Sports/ Athletics	SMERF
New York City, NY	71.9%	65.1%	65.5%	70.0%	67.4%
Washington, DC	65.6%	58.4%	70.4%	67.0%	64.4%
San Francisco, CA	66.7%	62.1%	62.6%	65.2%	63.9%
Las Vegas, NV	70.0%	57.9%	64.3%	64.8%	62.9%
Atlanta, GA	66.7%	59.4%	63.9%	64.7%	63.2%
Dallas, TX	69.2%	58.2%	62.4%	62.4%	63.0%
Chicago, IL	65.6%	61.9%	61.6%	63.8%	60.8%
Miami, FL	67.3%	57.9%	63.2%	64.7%	63.2%
Toronto, Canada	66.9%	58.2%	61.8%	65.6%	63.7%
Austin, TX	62.2%	61.1%	63.0%	65.0%	61.4%
San Diego, CA	64.6%	58.2%	65.1%	62.1%	62.7%
San Antonio, TX	62.9%	60.9%	63.2%	64.7%	62.8%
Seattle, WA	64.6%	55.4%	64.1%	66.5%	62.8%
Houston, TX	61.6%	56.9%	65.3%	63.9%	61.8%
New Orleans, LA	63.1%	57.9%	62.0%	62.1%	60.2%
Orlando, FL	64.6%	60.6%	60.3%	62.0%	61.8%
Denver, CO	59.9%	58.9%	62.8%	61.5%	61.8%
Charlotte, NC	60.1%	57.9%	61.1%	61.6%	60.5%
Philadelphia, PA	57.0%	57.9%	61.6%	60.7%	59.2%
Vancouver, Canada	58.4%	56.9%	60.7%	60.7%	58.7%
Phoenix, AZ	58.2%	56.4%	60.5%	61.5%	58.9%
Baltimore, MD	55.9%	56.9%	56.9%	62.5%	59.9%
St. Louis, MO	53.6%	59.9%	59.2%	60.7%	59.3%
Portland, OR	57.0%	53.0%	58.4%	60.7%	58.0%
Base	474	404	476	781	991

Increased popularity with attendees. Base: All respondents. 1,499 responses.

# Favorable Hotel Product

% Extremely Favorable or Favorable

City	%
New York City, NY	73.4%
Washington, DC	71.8%
San Francisco, CA	71.5%
Chicago, IL	71.2%
New Orleans, LA	70.4%
Toronto, Canada	70.0%
Dallas, TX	69.9%
Miami, FL	69.8%
Orlando, FL	69.7%
Austin, TX	69.6%
Vancouver, Canada	69.5%
Houston, TX	69.4%
Atlanta, GA	68.6%
San Diego, CA	68.5%
Seattle, WA	67.9%
Las Vegas, NV	67.8%
Philadelphia, PA	67.0%
Charlotte, NC	66.8%
Denver, CO	66.2%
Baltimore, MD	65.9%
Phoenix, AZ	65.8%
Portland, OR	65.6%
St. Louis, MO	65.4%

	Corporate	Association	Third Party	Sports/ Athletics	SMERF
New York City, NY	77.6%	69.8%	71.8%	74.3%	73.0%
Washington, DC	74.3%	68.3%	70.6%	72.2%	71.0%
San Francisco, CA	74.1%	67.6%	71.4%	72.5%	70.4%
Chicago, IL	72.8%	68.3%	71.6%	70.9%	70.0%
New Orleans, LA	74.1%	66.6%	68.9%	70.7%	68.8%
Toronto, Canada	71.5%	64.9%	71.8%	72.0%	70.1%
Dallas, TX	71.9%	67.8%	69.1%	69.9%	69.4%
Miami, FL	73.4%	66.8%	68.7%	71.4%	69.0%
Orlando, FL	71.7%	65.8%	69.7%	70.8%	69.2%
Austin, TX	73.8%	66.1%	68.3%	72.0%	69.3%
Vancouver, Canada	70.0%	67.1%	70.6%	72.0%	69.3%
Houston, TX	71.1%	65.1%	71.2%	70.2%	68.4%
Atlanta, GA	71.5%	64.1%	68.1%	69.9%	67.1%
San Diego, CA	69.8%	67.3%	67.6%	69.3%	67.9%
Seattle, WA	70.3%	63.9%	68.7%	69.0%	67.0%
Las Vegas, NV	69.8%	59.2%	71.0%	68.0%	67.9%
Philadelphia, PA	69.2%	62.6%	68.1%	70.4%	67.4%
Charlotte, NC	65.6%	66.1%	70.2%	67.9%	68.2%
Denver, CO	69.2%	62.9%	66.4%	65.3%	64.3%
Baltimore, MD	63.9%	66.8%	67.6%	67.5%	68.4%
Phoenix, AZ	68.6%	64.9%	63.0%	67.9%	65.5%
Portland, OR	66.7%	65.6%	63.9%	68.4%	66.8%
St. Louis, MO	62.4%	65.1%	68.5%	69.9%	67.7%
Base	**474**	**404**	**476**	**781**	**991**

Safe Destination for Meetings (in Terms of Personal Safety)

% Strongly Agree or Agree
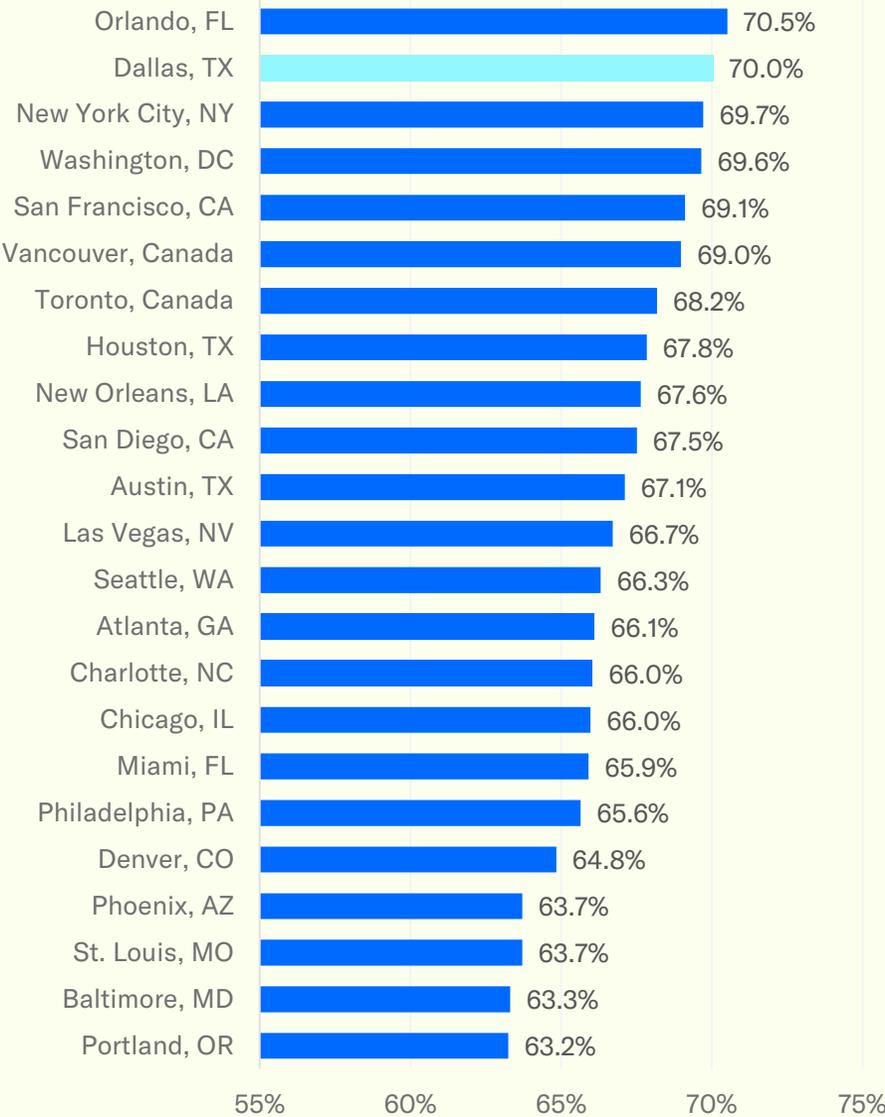
	Corporate	Association	Third Party	Sports/Athletics	SMERF
Orlando, FL	69.2%	70.5%	71.8%	73.4%	68.6%
Dallas, TX	70.5%	67.3%	71.4%	72.6%	69.3%
New York City, NY	69.4%	68.6%	70.0%	70.2%	69.8%
Washington, DC	71.5%	69.3%	68.7%	69.5%	69.8%
San Francisco, CA	71.7%	66.6%	68.3%	71.8%	70.4%
Vancouver, Canada	69.2%	61.4%	72.9%	70.8%	69.5%
Toronto, Canada	67.9%	65.8%	68.1%	70.6%	70.3%
Houston, TX	70.5%	62.1%	69.1%	69.8%	66.9%
New Orleans, LA	66.7%	67.1%	68.9%	68.0%	68.0%
San Diego, CA	73.4%	64.9%	63.4%	69.3%	67.1%
Austin, TX	68.6%	66.6%	64.9%	68.9%	67.8%
Las Vegas, NV	67.7%	62.1%	67.9%	68.8%	66.7%
Seattle, WA	67.7%	64.6%	66.8%	69.8%	68.1%
Atlanta, GA	68.4%	62.9%	66.6%	68.0%	65.3%
Charlotte, NC	67.1%	62.6%	68.9%	69.9%	66.8%
Chicago, IL	68.6%	61.4%	66.0%	66.8%	65.8%
Miami, FL	69.8%	64.1%	64.9%	67.0%	64.6%
Philadelphia, PA	66.5%	60.4%	67.0%	70.2%	67.5%
Denver, CO	64.1%	63.4%	65.3%	66.6%	65.1%
Phoenix, AZ	63.5%	63.1%	65.1%	66.1%	64.7%
St. Louis, MO	63.3%	59.9%	65.8%	65.9%	64.0%
Baltimore, MD	62.9%	59.9%	63.9%	66.8%	63.0%
Portland, OR	60.5%	65.8%	64.1%	66.3%	65.5%
Base	**474**	**404**	**476**	**781**	**991**

Chart values (% Strongly Agree or Agree):

- Orlando, FL — 70.5%
- Dallas, TX — 70.0%
- New York City, NY — 69.7%
- Washington, DC — 69.6%
- San Francisco, CA — 69.1%
- Vancouver, Canada — 69.0%
- Toronto, Canada — 68.2%
- Houston, TX — 67.8%
- New Orleans, LA — 67.6%
- San Diego, CA — 67.5%
- Austin, TX — 67.1%
- Las Vegas, NV — 66.7%
- Seattle, WA — 66.3%
- Atlanta, GA — 66.1%
- Charlotte, NC — 66.0%
- Chicago, IL — 66.0%
- Miami, FL — 65.9%
- Philadelphia, PA — 65.6%
- Denver, CO — 64.8%
- Phoenix, AZ — 63.7%
- St. Louis, MO — 63.7%
- Baltimore, MD — 63.3%
- Portland, OR — 63.2%

Agree it is a safe destination for meetings/events (general personal safety). Base: All respondents. 1,499 responses.

Financial Favorability

% Extremely Favorable or Favorable

City	%
Washington, DC	69.6%
Dallas, TX	69.1%
New York City, NY	69.1%
Miami, FL	68.6%
San Francisco, CA	68.6%
Orlando, FL	68.2%
Chicago, IL	67.8%
Vancouver, Canada	67.8%
Toronto, Canada	67.6%
San Diego, CA	67.1%
Austin, TX	67.0%
Atlanta, GA	66.9%
Charlotte, NC	66.6%
Philadelphia, PA	66.1%
Denver, CO	65.9%
New Orleans, LA	65.7%
St. Louis, MO	65.6%
Seattle, WA	65.4%
Houston, TX	65.1%
Phoenix, AZ	65.1%
Portland, OR	64.6%
Baltimore, MD	64.5%
Las Vegas, NV	64.1%
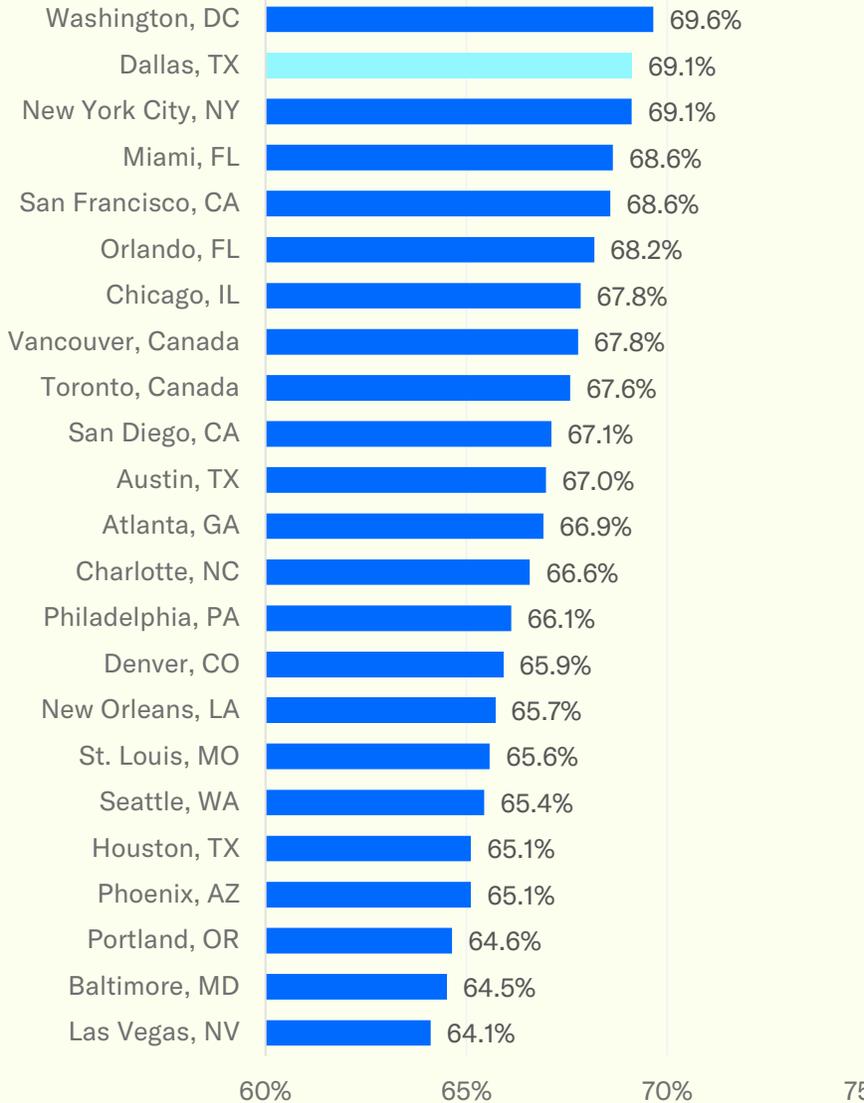
	Corporate	Association	Third Party	Sports/ Athletics	SMERF
Washington, DC	73.0%	66.1%	68.1%	70.9%	69.5%
Dallas, TX	70.3%	67.3%	70.4%	71.3%	69.2%
New York City, NY	68.4%	67.6%	70.8%	71.8%	70.6%
Miami, FL	67.1%	67.3%	69.7%	70.8%	69.6%
San Francisco, CA	71.3%	65.1%	69.7%	71.8%	69.0%
Orlando, FL	72.4%	60.4%	69.7%	69.1%	67.6%
Chicago, IL	70.5%	67.1%	66.0%	70.2%	68.7%
Vancouver, Canada	68.1%	66.6%	66.8%	69.5%	68.0%
Toronto, Canada	68.1%	64.4%	67.6%	70.4%	69.6%
San Diego, CA	69.0%	64.9%	67.0%	70.4%	67.3%
Austin, TX	71.7%	62.6%	64.3%	66.5%	66.2%
Atlanta, GA	70.9%	58.4%	69.1%	68.1%	66.0%
Charlotte, NC	67.5%	63.1%	68.9%	70.8%	66.8%
Philadelphia, PA	67.5%	63.9%	67.2%	67.3%	66.1%
Denver, CO	62.9%	63.9%	68.9%	70.3%	68.3%
New Orleans, LA	71.1%	60.6%	64.9%	66.8%	65.7%
St. Louis, MO	65.8%	64.1%	64.7%	68.6%	67.0%
Seattle, WA	67.5%	63.1%	64.7%	69.3%	67.0%
Houston, TX	66.7%	62.6%	63.9%	65.8%	66.4%
Phoenix, AZ	68.6%	61.1%	66.4%	67.7%	64.1%
Portland, OR	65.6%	60.9%	65.1%	69.0%	65.9%
Baltimore, MD	65.2%	62.6%	65.1%	67.9%	64.5%
Las Vegas, NV	66.9%	63.4%	61.6%	66.3%	64.8%
Base	**474**	**404**	**476**	**781**	**991**

Financially favorable destination (i.e., overall conditions for a profitable/financially acceptable outcome).
Base: All respondents. 1,499 responses.

"**Dallas is a destination that has a diverse offering as far as hotels and venues are concerned. Overall, I would say it is one of those destinations where your group will definitely have a good experience.**"

- meeting planner

All Dallas ads were generally well-received. The diversity and positive, upbeat tone of the video ad, and the eye-catching photography of the two print ads were highlighted by multiple planners.

Strategic Takeaways for 2025

01. Lead with 'Welcoming' Safety

Move beyond security theater. Highlight inclusivity and diversity initiatives to counter political hesitation.

02. Highlight Value & Efficiency

Position Dallas as offering Tier 1 infrastructure with 'do more with less' capability.

03. Be the Human Bridge

Leverage trust. Use AI for reach, but use human staff to provide the "local secrets" AI can't fake.

04. Sell the City, Not the Box

Combat convention fatigue by selling the transformative experiences available outside the convention center walls.

Thank You!

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Livestream Calendar

Future Partners