MMGY PORTRAIT of American & Canadian International Travelers™

Tourist Office of Spain in New York

TURESPAÑA

ESPAÑA

Methodology

MMGY conducted its sixth annual national survey of American international travelers and third annual national survey of Canadian international travelers. In order to qualify for the survey, respondents had to:

- reside in the U.S. or Canada;
- have taken at least one vacation outside of North America or the Caribbean during the past three years;
- expect to take at least one vacation outside of North America or the Caribbean during the next 12 months.

An online survey was conducted for American travelers (July 3 through July 18, 2025) and Canadian travelers (July 3 through July 18, 2025) and received a total of 2,064 responses, 1,046 in the U.S. and 1,018 in Canada. Respondents were selected randomly and participated in a 20-minute online survey. The sample has been weighted to ensure the data is representative of American and Canadian households. Due to the small sample size, Silent/GI respondents have not been included in the survey.

Out of the 1,046 U.S. and 1,018 Canadian respondents, 732 U.S. respondents and 542 Canadian respondents qualified as a **Spain prospect**. To qualify, they rated their interest in visiting Spain during the next 3 years as 4/5 on a 5-point scale, as well as meeting the other survey criteria listed above.

Generation	Age	% of Respondents
Gen Zers	18–28	16%
Millennials	29–44	31%
Gen Xers	45–60	28%
Boomers	61–79	23%
Silent/GI	80+	1%

KEY FINDINGS:

Proprietary Questions:

Interest in visiting Spain during the next three years is very strong, with 70% of American and 53% of Canadian international travelers very/extremely interested in visiting.

Madrid, Barcelona, Valencia and Seville are the top four regions for all prospects and top Spanish attributes include its culinary delights, rich culture and history, and natural beauty and landscapes. Spain scores well on a wide variety of destination attributes, underlining its universal appeal and wide popularity among American and Canadian prospects, despite being outscored in some areas, such as culinary delights by Italy and France, or affordability by Portugal and Costa Rica.

International Travel Outlook:

American prospects are planning to take 3.0 international trips in the next two years and intend to spend $13,394 during the next 12 months. Canadian prospects are more conservative with their travel, planning to take 2.4 trips and spend $8,032 over the same periods.

Concerns about personal safety and the political climate are the top two factors impacting international travel for Spain prospects, with the impact of tariffs affecting 41% of American prospects and 48% of Canadian prospects.

Travel Motivators and Activities:

Destination prioritization is driven by safety, cultural activities and weather above all else, with international prospects looking to experience different cultures as their top priority when vacationing abroad.

Leading on from restaurant/food experiences being the top (or joint-top) activity of interest for Canadian and American prospects, authentic food eaten by locals and sampling street food, including food trucks are the top culinary destination activities for prospects.

Sources of Travel Information:

Selecting the destination is the first step in the travel planning process for all prospects, with prospects tending to research online travel reviews/ratings earlier than non-prospects.

The top websites used as information sources for prospects are Booking.com and Expedia, while social media also plays a key role in travel planning. YouTube and Instagram are the top two platforms used by prospects, with usage of these tools for travel planning significantly higher among prospects compared to non-prospects.

International Travel Preferences:

Eight in ten prospects from America (84%) and Canada (80%) prefer to visit multiple destinations when traveling internationally and are most likely to travel with their spouse/significant other, friends or family.

They are most likely to stay in a resort or traditional chain-affiliated hotel, although short-term vacation rentals, such as Airbnb, are growing in popularity, especially for prospects relative to non-prospects.

Sustainability in Travel:

Sustainability is a key travel consideration for all prospects and American prospects are significantly more concerned with eco-friendly initiatives when vacationing abroad.

Eighty-four percent of American and 70% of Canadian prospects are willing to pay more for environmentally responsible travel service providers. American Millennials rank the highest in their willingness to pay more for sustainable travel practices, as well as familiarity with sustainable travel practices.

Source: MMGY's 2025 *Portrait of American and Canadian International Travelers*™

KEY FINDINGS:

Cruising:

With 84% of American prospects and 69% of Canadian prospects somewhat/extremely interested in big ship cruises during the next two years, these ocean voyages are the most popular type of cruising.

Europe and the Caribbean are the top two cruise destinations for all prospects, with these prospective Spain visitors significantly more likely to have a strong interest in cruising over the next two years than non-prospects.

Travel Advisors:

Usage of travel advisors is very strong across all prospects and has seen significant growth over the past few years, despite the prevalence of AI tools in travel planning. These advisors are commonly used for otherwise inaccessible activities/destinations, complex itineraries and new destinations.

Almost 3 in 4 (73%) American prospects and 51% of Canadian prospects are planning to use a traditional travel advisor for their international vacations during the next two years.

Organized Group Tours:

Seeing multiple sites and the ease of the planning process are the top two drivers behind the strong popularity of organized group tours among prospects. Seventy-three percent of American and 53% of Canadian prospects are planning partake in these vacations during the next two years.

Prospects particularly value the knowledge of destinations that organized group tours bring, allowing them to fully immerse themselves in the culture and history of the international destinations they visit.

Flight Preferences:

Prospects are more likely than non-prospects to fly in upgraded classes, with 36% of Americans and 18% of Canadians flying business or first class.

These premium flyers commonly book through airline websites or online travel agencies and 81% of both sets of prospects stated that they found the cost of airfare influential when determining destination selection.

Furthermore, willingness to take international flights with multiple connections was highest amongst American prospects, although all travelers were willing to trade in a shorter, more comfortable flight for a cheaper airfare and access to more exciting international destinations.

International Business Travel:

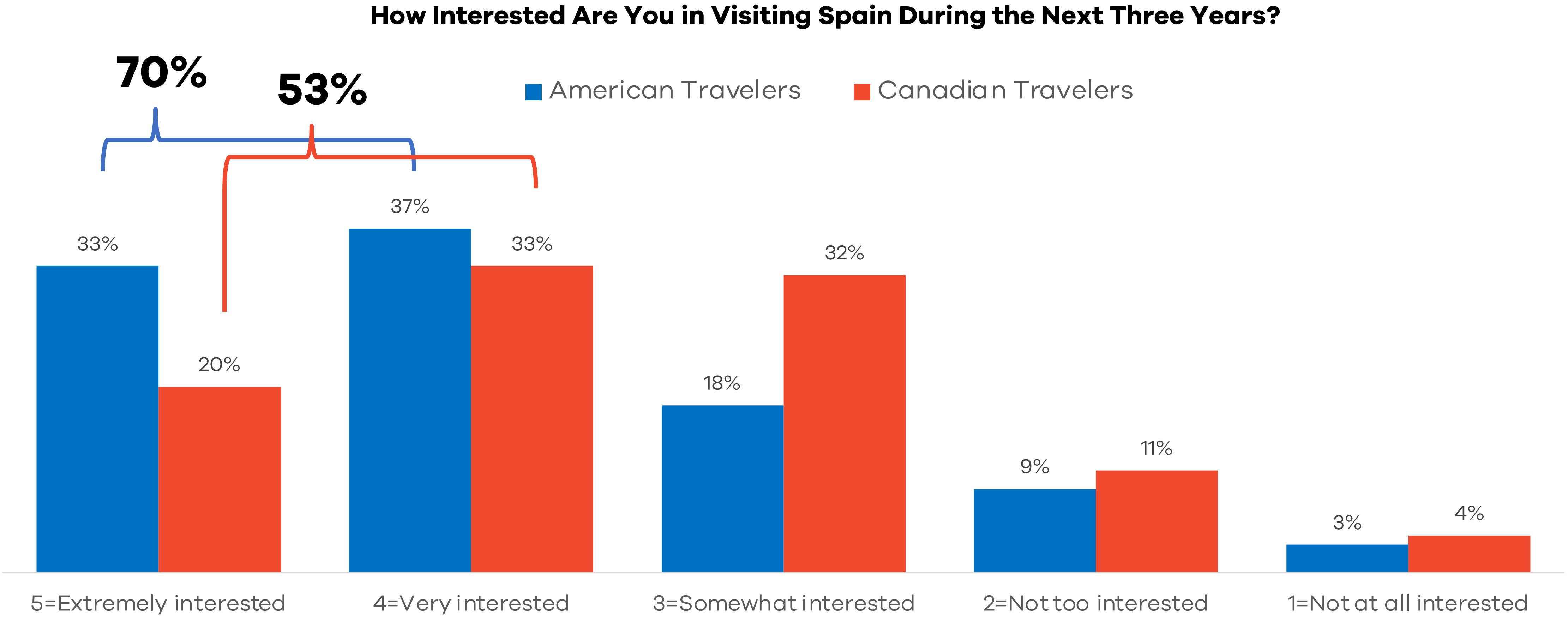
Business travel is a significant travel driver for American and Canadian prospects, only 9% of American prospects and 21% of Canadian prospects never extend their business trips for leisure.

American prospects are particularly likely to frequently take advantage o non-mandatory international conferences or events to travel for leisure, with 60% very likely to take a business trip if they find the destination appealing.

International business trips are similarly important to Canadian prospects and both groups find the destination’s offerings, cost of accommodations and events taking place to be the most influential factors when deciding to extend these trips for leisure.

Source: MMGY's 2025 *Portrait of American and Canadian International Travelers*TM

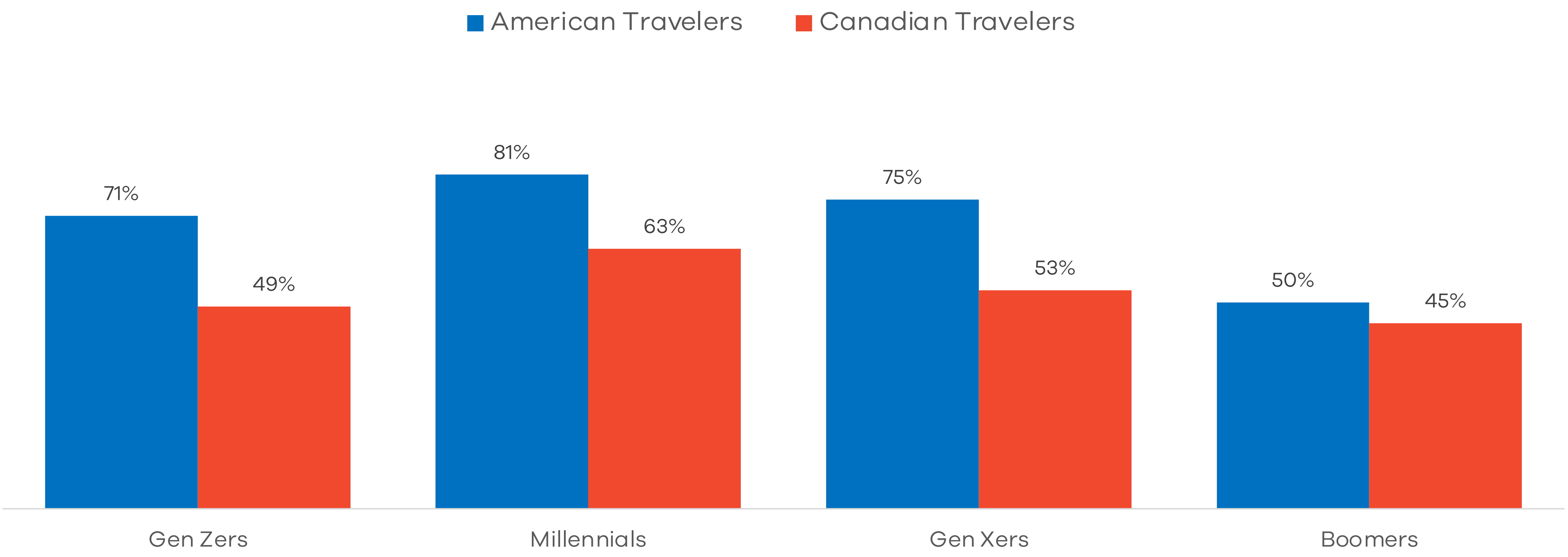
Seven in 10 (70%) American international travelers are very/extremely interested in visiting Spain in the next three years, while over half (53%) of Canadians expressed an interest.



Base: American international travelers (n=1,046); Canadian international travelers (n=1,018)
Source: MMGY's 2025 *Portrait of American and Canadian International Travelers*™

Millennials from America and Canada are the most interested in visiting Spain, with interest also strong for Gen Zers and Gen Xers across both markets.

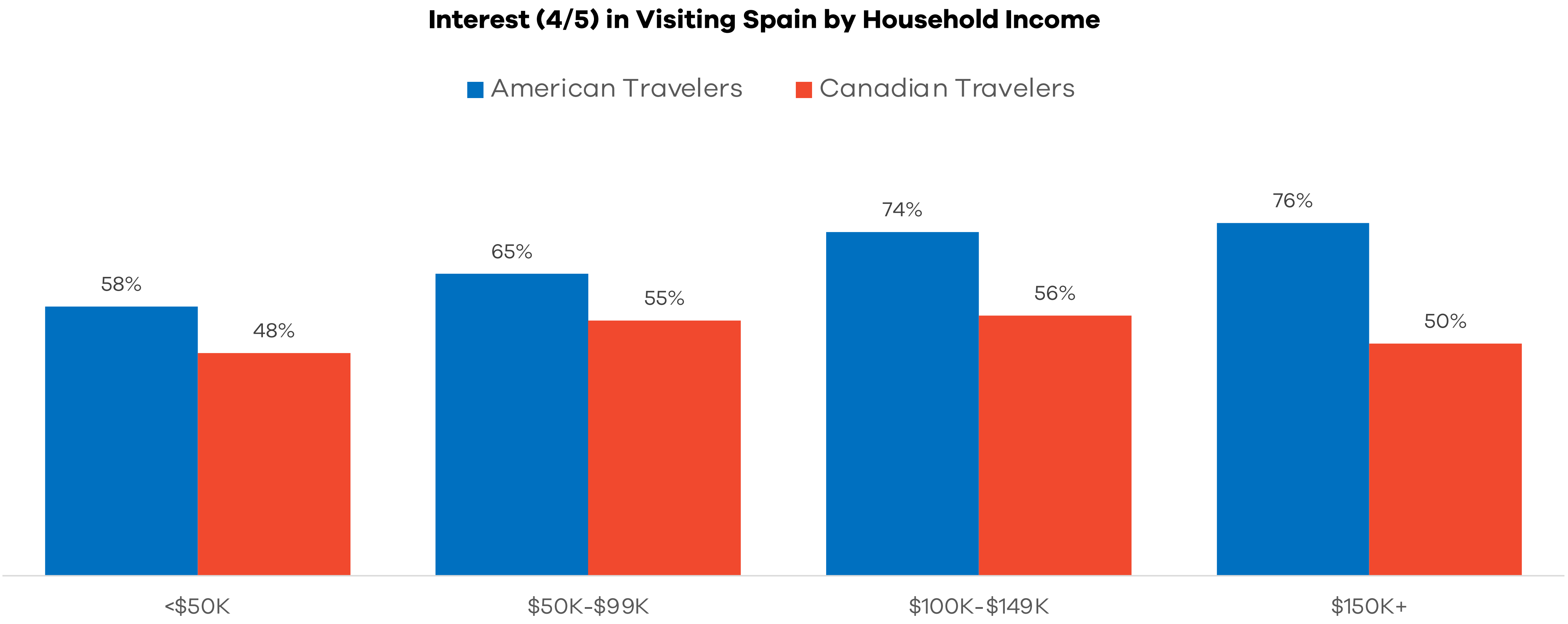
Interest (4/5) in Visiting Spain by Generation



All Travelers

Base: American international travelers (Gen Zers: n=175; Millennials: n=334; Gen Xers: n=293; Boomers: n=233); Canadian international travelers (Gen Zers: n=153; Millennials: n=313; Gen Xers: n=293; Boomers: n=249)
Source: MMGY's 2025 *Portrait of American and Canadian International Travelers*™

Interest in visiting Spain increases with household income for American international travelers, with Canadian interest peaking among those with a HHI of $100K-$149K.

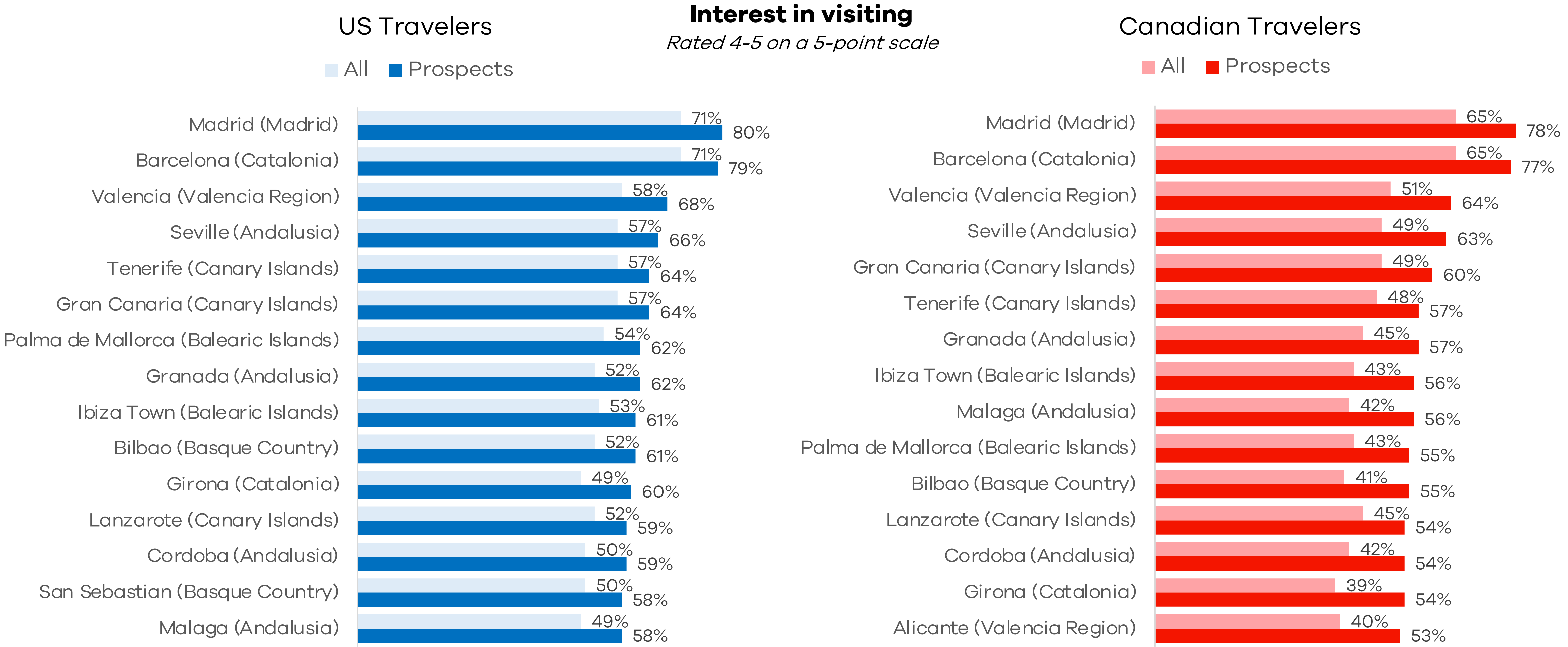


Base: American international travelers (<$50K: n=138; $50K-$99K: n=304; $100K-$149K: n=297; $150K+: n=307); Canadian international travelers (<$50K: n=153; $50K-$99K: n=365; $100K-$149K: n=278; $150K+: n=222)
Source: MMGY's 2025 *Portrait of American and Canadian International Travelers*™

All Travelers

The top 4 destinations, Madrid, Barcelona, Valencia and Seville are consistent across American and Canadian prospects.

(Spanish Destinations of Interest, slide 1 of 2)



Base: American international travelers (n=1,042) + Spain Prospects (n=731), Canadian international travelers (n=1,018) + Spain Prospects (n=542)

Source: MMGY's 2025 *Portrait of American and Canadian International Travelers*™

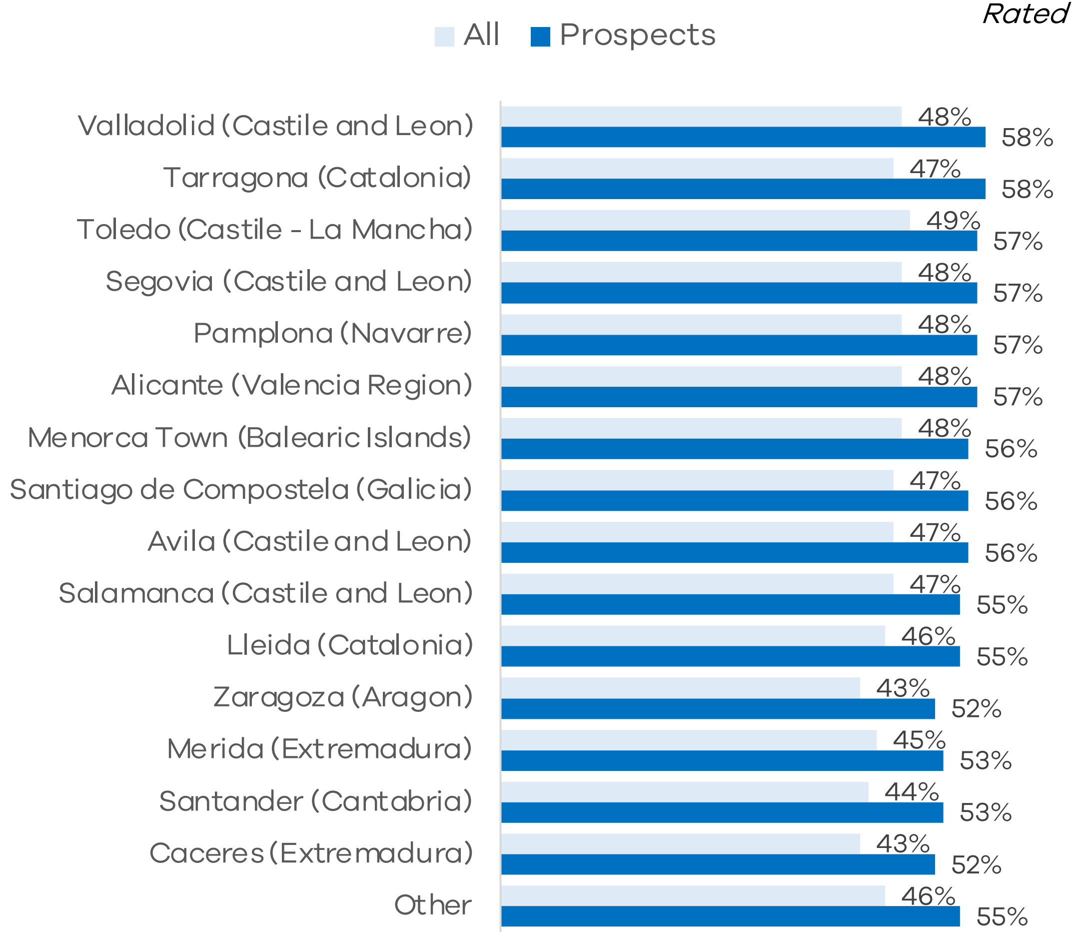
American prospects have a stronger interest in a wider variety of Spanish destinations comapred to their Canadian counterparts.

(Spanish Destinations of Interest, slide 2 of 2)

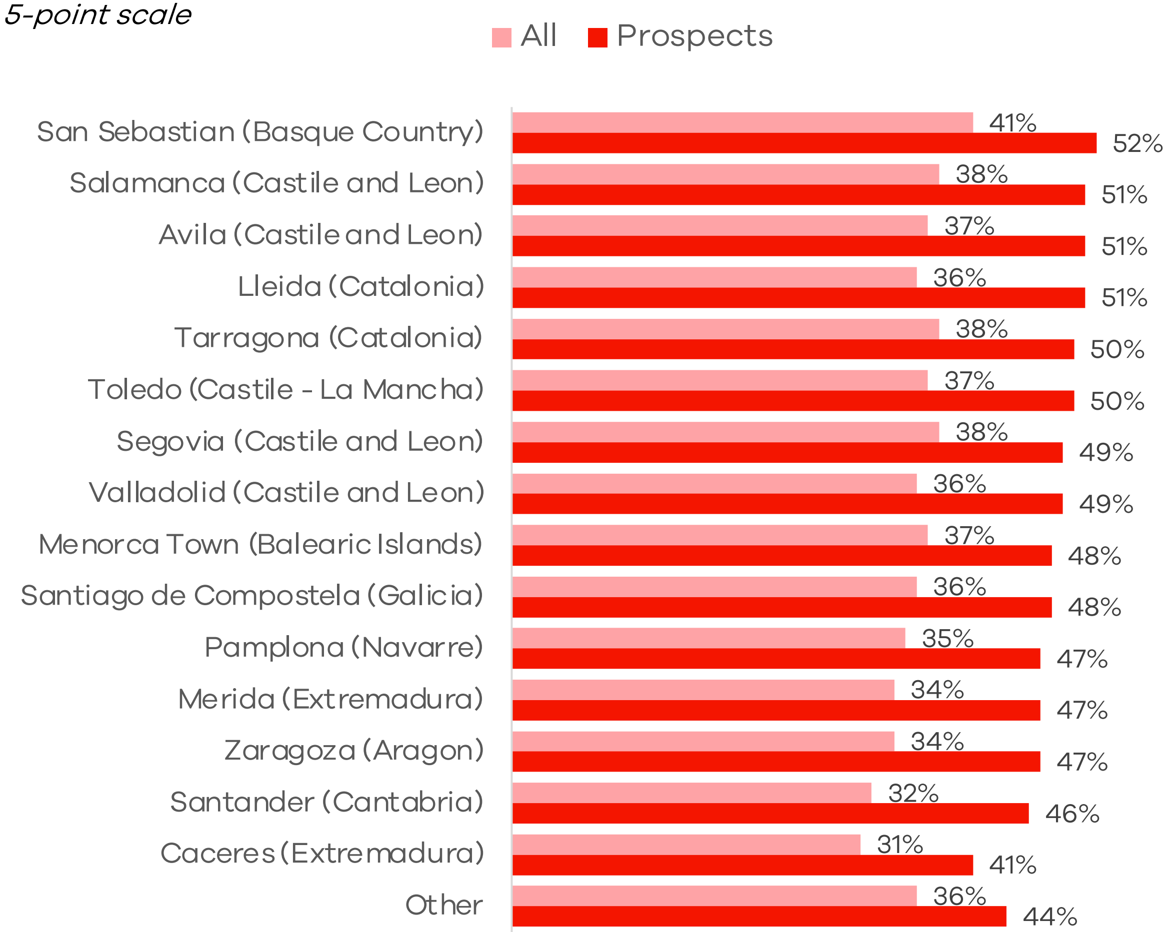
Interest in visiting

Rated 4-5 on a 5-point scale

US Travelers



Canadian Travelers



Base: American international travelers (n=1,046) + Spain Prospects (n=732), Canadian international travelers (n=1,018) + Spain Prospects (n=542)

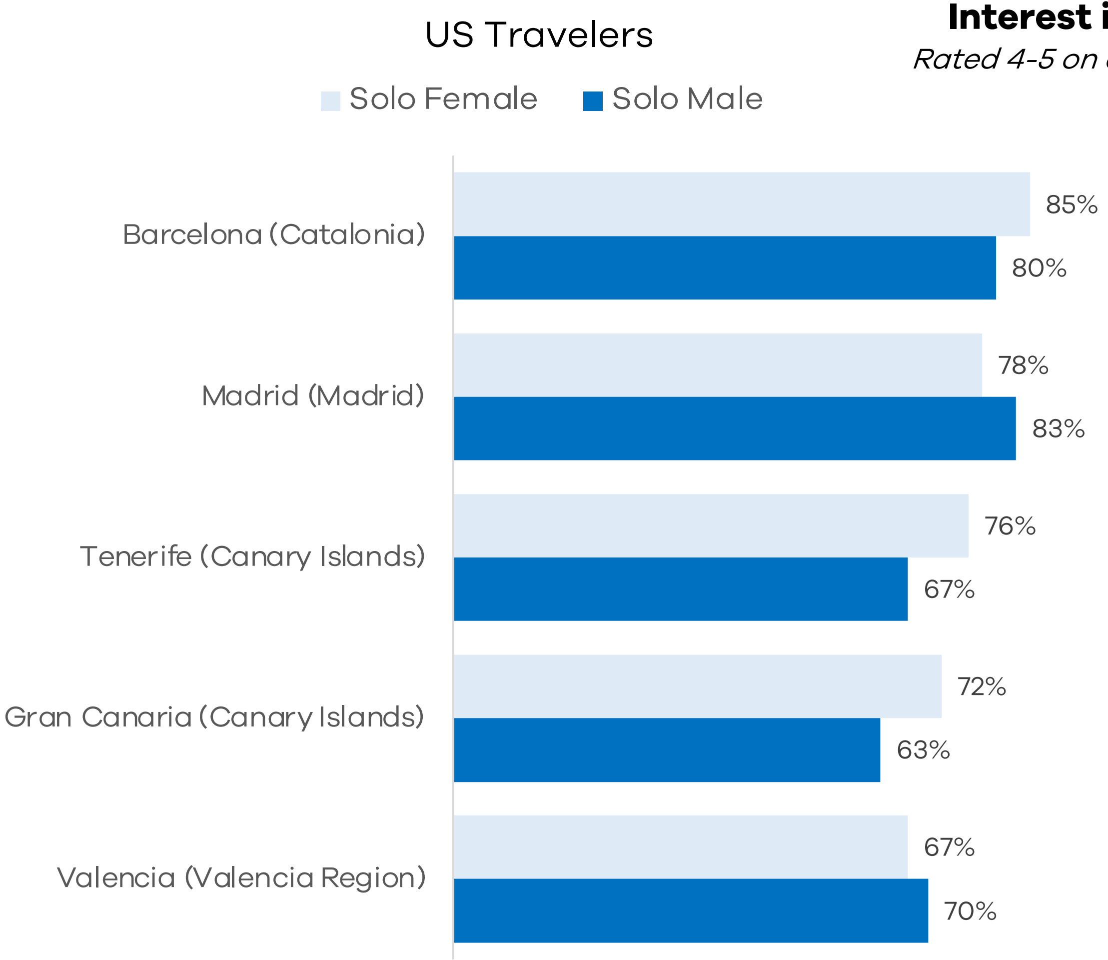
Source: MMGY's 2025 *Portrait of American and Canadian International Travelers*™

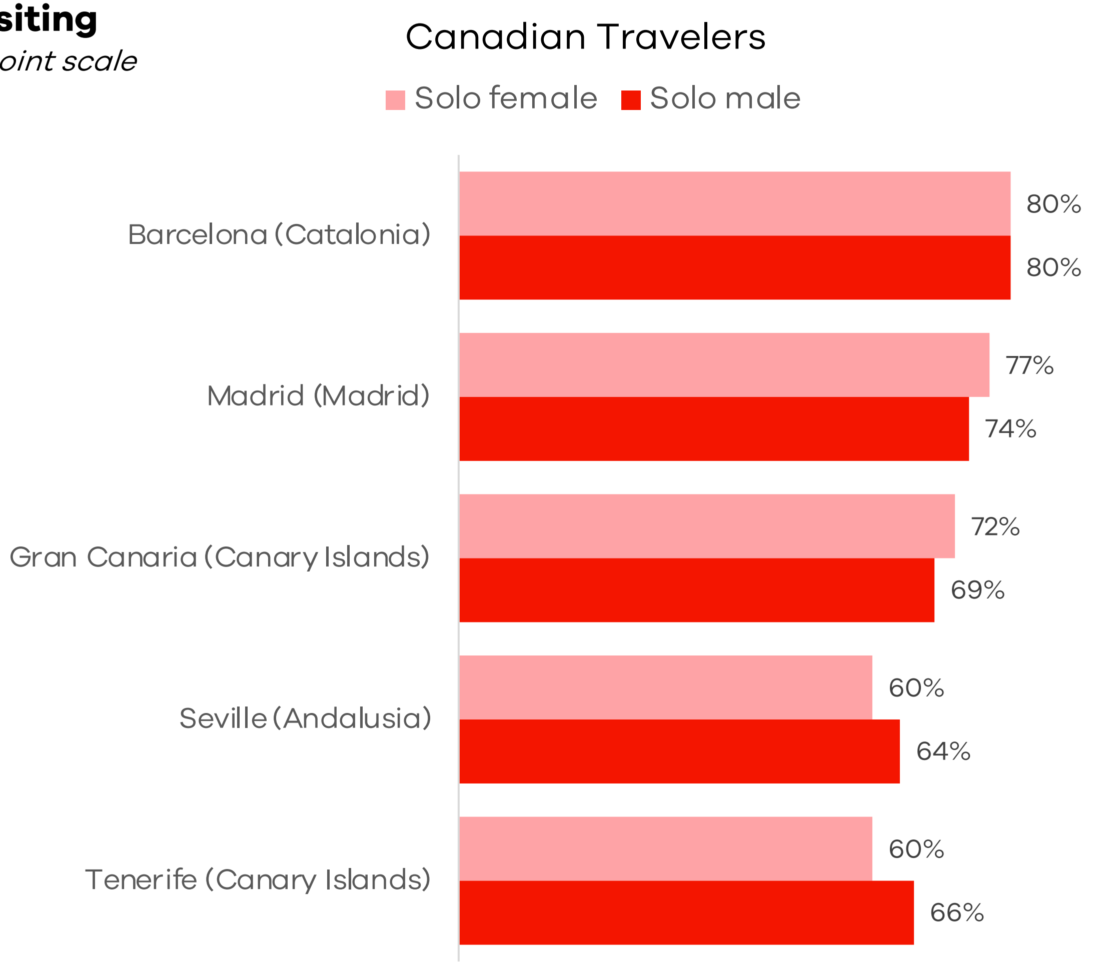
Barcelona the top destination among all solo female travelers, while Tenerife is more popular among American female solo travelers than Canadians.

(Top destinations for Solo Female/Male Travelers)

Interest in visiting

Rated 4-5 on a 5-point scale





Base: American solo female prospects (n=67); solo male prospects (n=81), Canadian solo female prospects (n=60); solo male prospects (n=61)

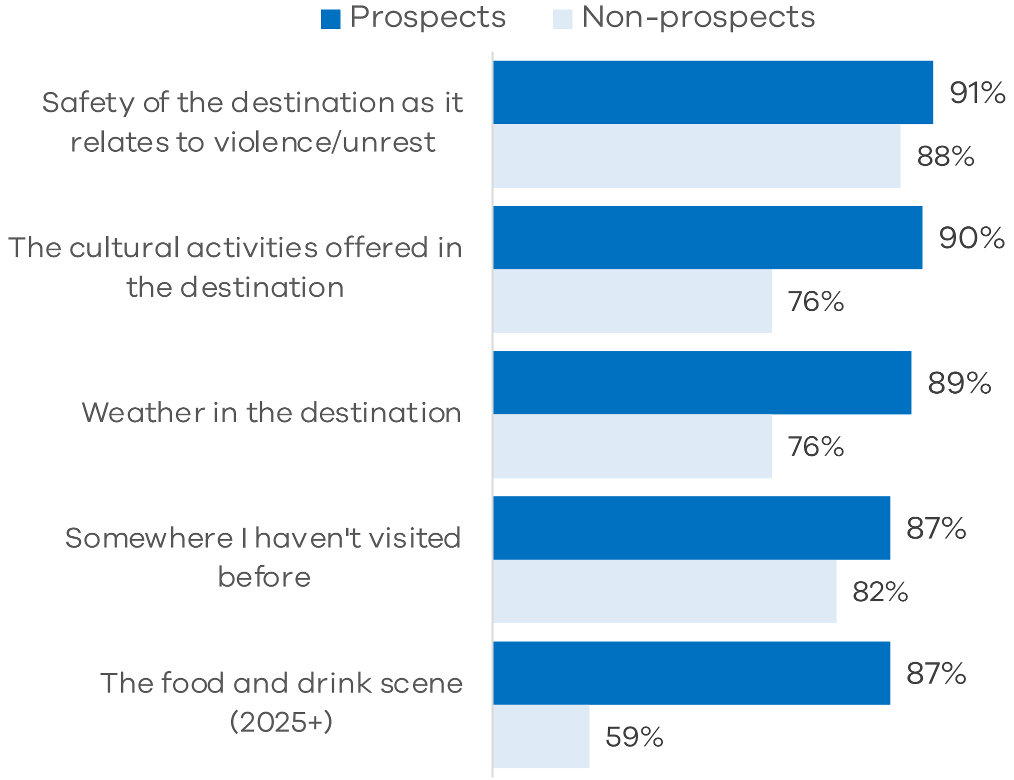
Source: MMGY's 2025 *Portrait of American and Canadian International Travelers*™

Travel Motivators & Activities

The safety of the destination is most important to all travelers, while weather and cultural activities are both significantly more important to prospects compared to non-prospects.*

% Somewhat/Extremely Influential When Prioritizing Which International Destination to Visit

American Travelers
Top Five Factors



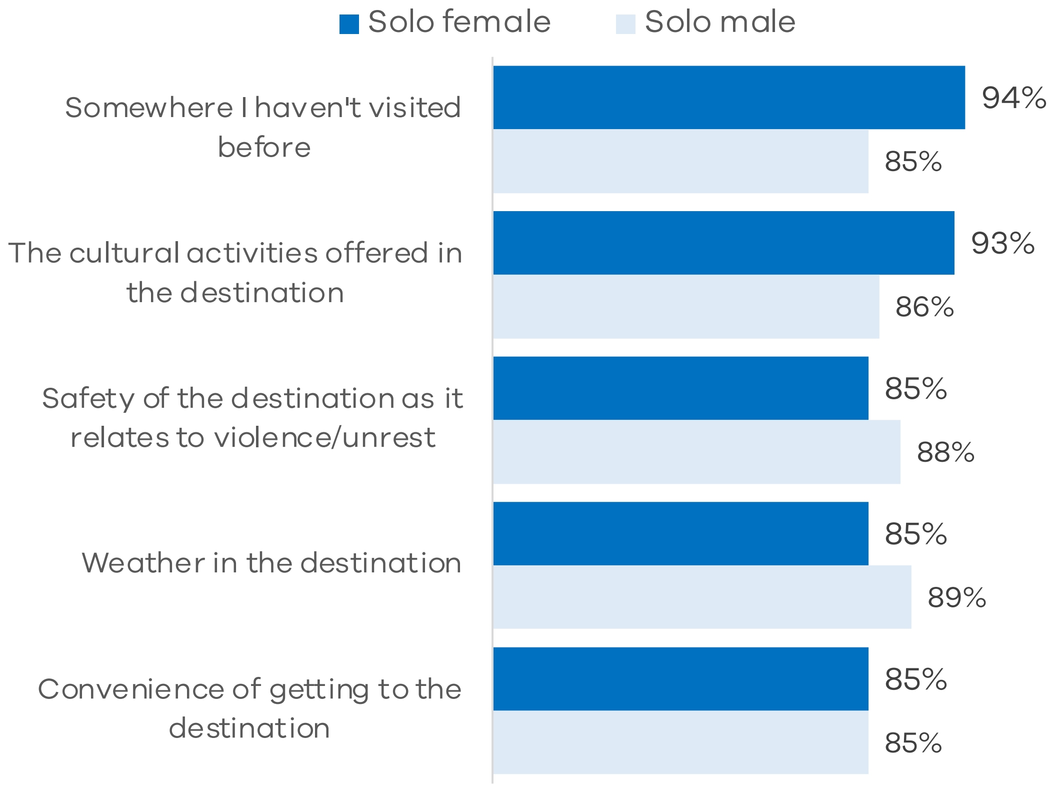
Canadian Travelers
Top Five Factors

***See appendix for full data**
Base: American prospects (n=732); Canadian prospects (n=542)
Source: MMGY's 2025 *Portrait of American and Canadian International Travelers*™

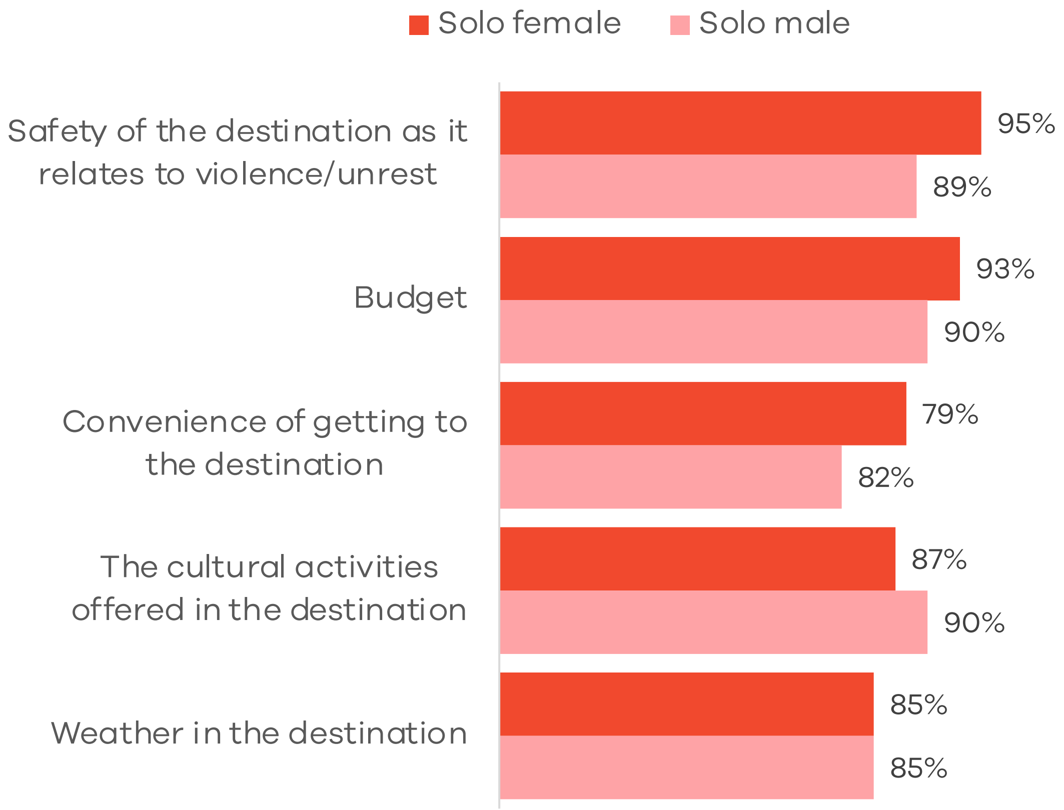
For solo female travelers, safety is a significant issue for Canadians, while American solo females are most concerned with visiting somewhere new and the cultural activities available.

% Somewhat/Extremely Influential When Prioritizing Which International Destination to Visit

American Travelers
Top Five Factors



Canadian Travelers
Top Five Factors



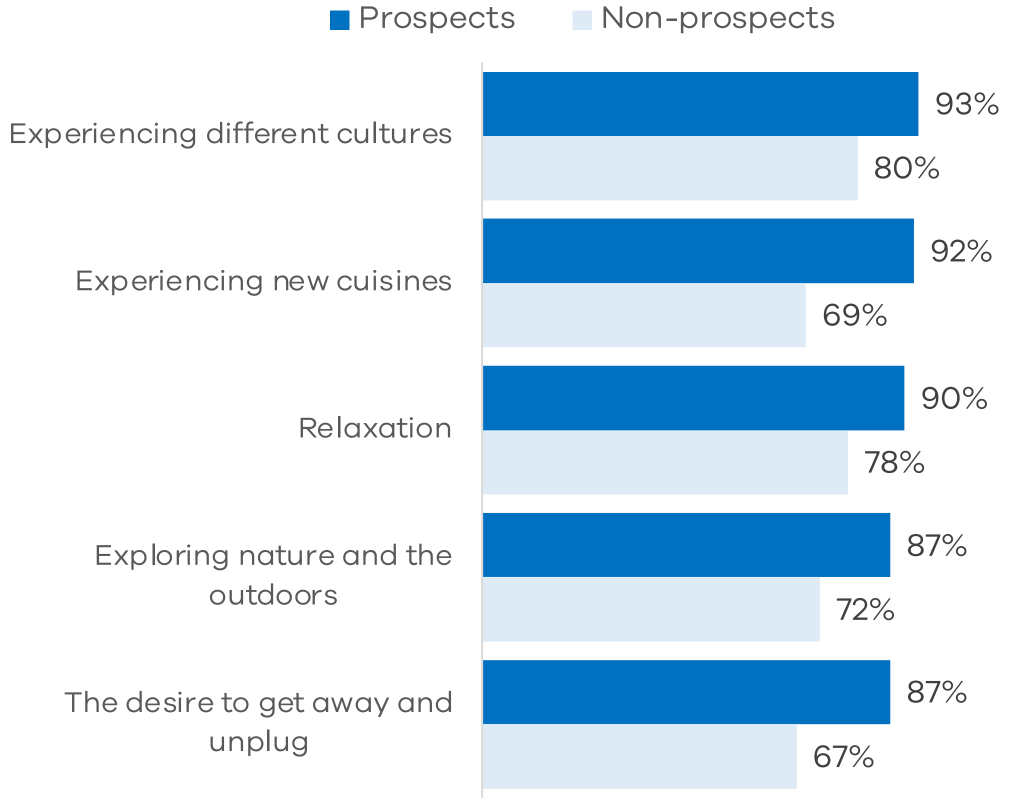
Base: American solo female prospects (n=67); solo male prospects (n=81), Canadian solo female prospects (n=60); solo male prospects (n=61)
Source: MMGY's 2025 *Portrait of American and Canadian International Travelers*™

All Travelers

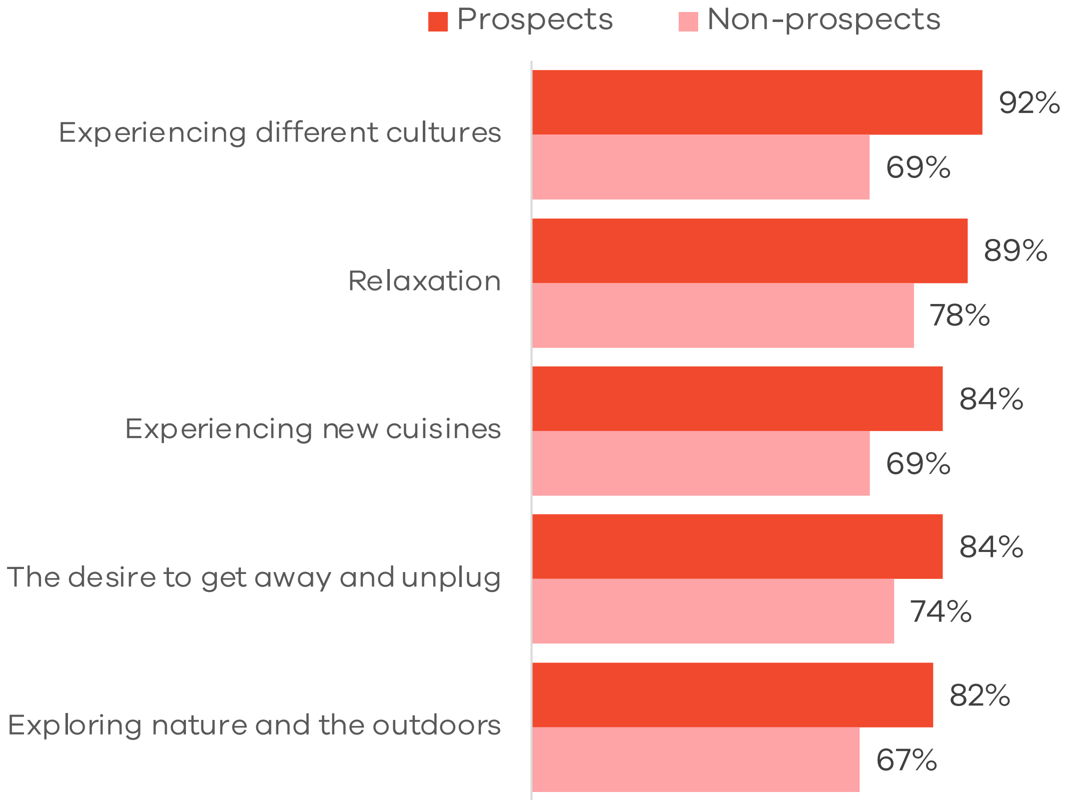
Experiencing different cultures emerged as the most motivating travel factor for all prospects.

% Somewhat/Extremely Motivating to Travel Internationally

American Travelers
Top Five Factors



Canadian Travelers
Top Five Factors

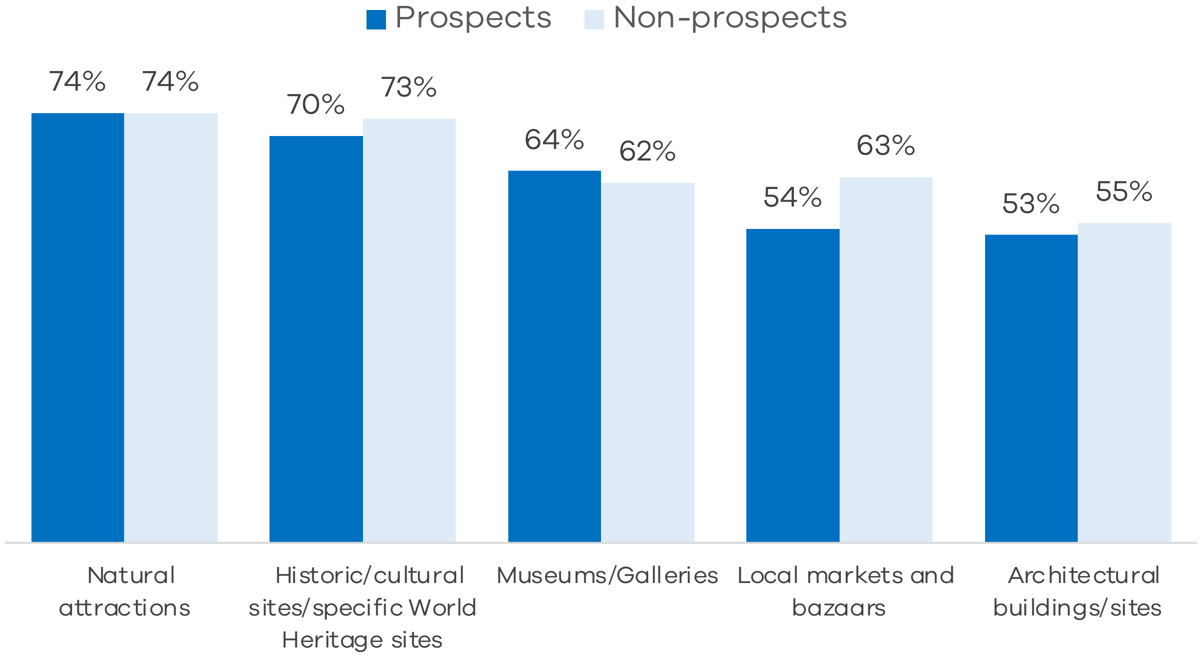


***See appendix for full data**
Base: American prospects (n=732); Canadian prospects (n=542)
Source: MMGY's 2025 *Portrait of American and Canadian International Travelers*™

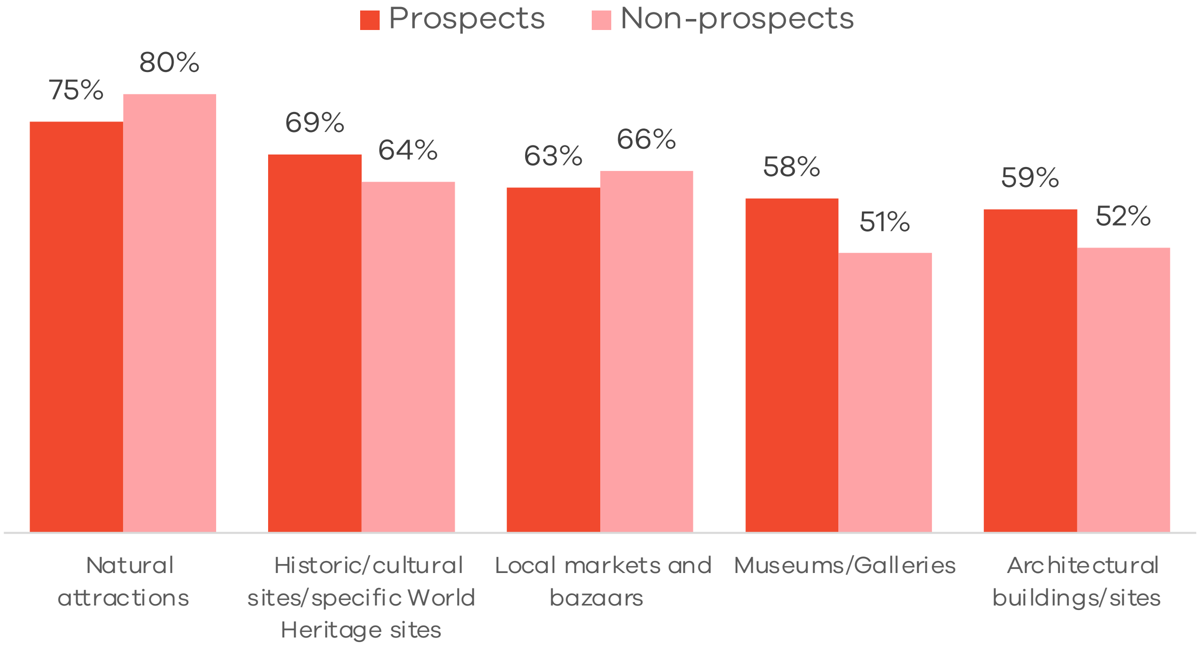
Natural attractions are the top attractions for prospects and non-prospects traveling internationally. Local markets and bazaars are significantly more attractive to Canadian prospects compared to American prospects.*

Which of the Following Attractions/Events are you Interested in Visiting on an International Vacation?

American Travelers
Top Five Attractions/Events



Canadian Travelers
Top Five Attractions/Events



All Travelers

***See appendix for full data**
Base: American prospects (n=732); Canadian prospects (n=542)
Source: MMGY's 2025 *Portrait of American and Canadian International Travelers*™

Top Activities of Interest on International Vacations

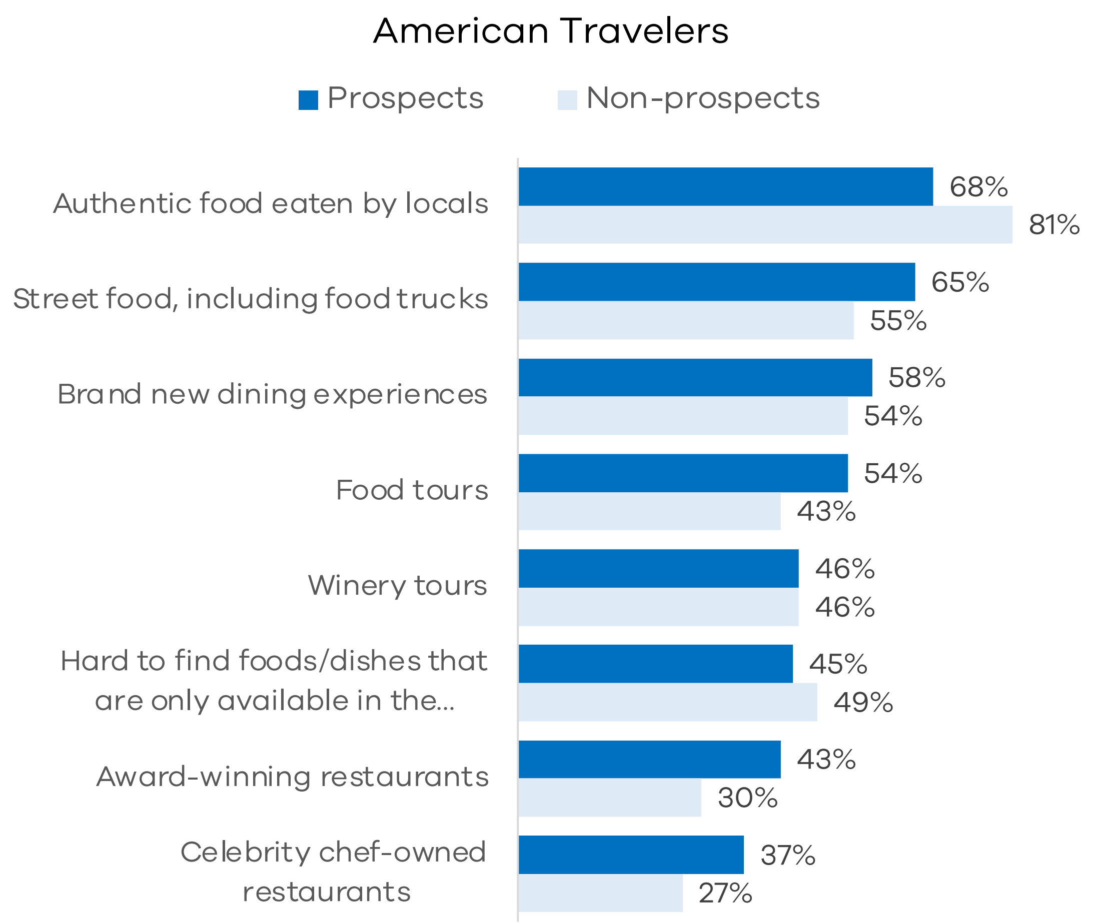
American Travelers	Prospects	Non-prospects
Restaurant/food experiences	62%	62%
Experiencing beautiful scenery	58%	70%
Visiting historical sites	57%	70%
Museums	54%	62%
Beach activities	53%	40%
Walking tours	48%	47%
Guided tours with access to local experiences that are otherwise inaccessible	46%	43%
Day cruises	46%	35%
Local experiences I can plan/discover for myself	45%	55%
Shopping at local boutiques	44%	41%

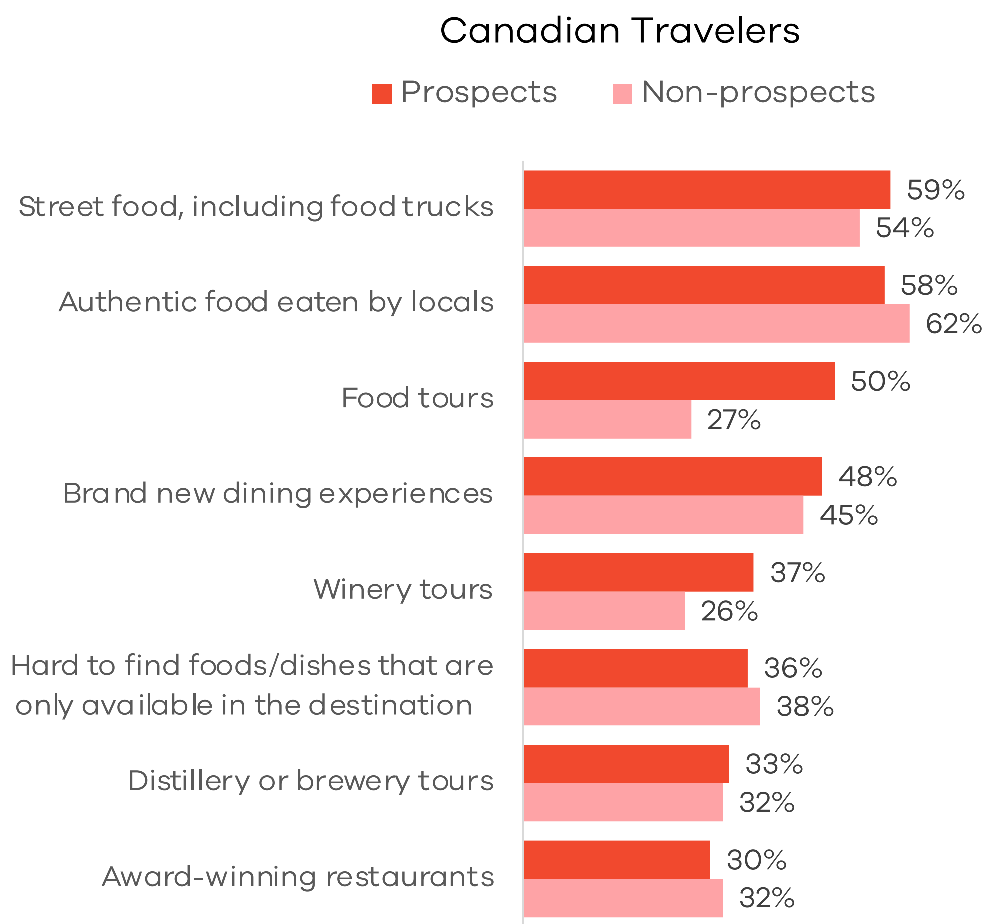
Canadian Travelers	Prospects	Non-prospects
Visiting historical sites	64%	66%
Restaurant/food experiences	64%	61%
Experiencing beautiful scenery	63%	66%
Walking tours	50%	56%
Local experiences I can plan/discover for myself	50%	46%
Museums	50%	49%
Guided tours with access to local experiences that are otherwise inaccessible	46%	44%
Beach activities	45%	39%
Shopping at local boutiques	44%	39%
Day cruises	38%	36%

Base: American prospects (n=732); Canadian prospects (n=542)
Source: MMGY's 2025 *Portrait of American and Canadian International Travelers*™

Authentic local dishes and street food, including food trucks are the top culinary options for American and Canadian prospects.

Culinary Options Interested in When Traveling Internationally





Base: American prospects (n=732); Canadian prospects (n=542)
Source: MMGY's 2025 *Portrait of American and Canadian International Travelers*TM

Sources of Travel Information

American Prospects

73%

Vs. 37% for Non-prospects

Canadian Prospects

67%

Vs. 48% for Non-prospects

indicate that they are relying on more sources of advice than ever before when making travel decisions.

American Prospects

Gen Zers	Millennials	Gen Xers	Boomers	<$100K	$100K+	Solo Female	Solo Male
69%	<u>81%</u>	78%	49%	63%	79%	57%	73%

Canadian Prospects

Gen Zers	Millennials	Gen Xers	Boomers	<$100K	$100K+	Solo Female	Solo Male
<u>76%</u>	74%	60%	58%	69%	65%	62%	69%

Largest value has been underlined.

All Travelers

Steps in the Travel Planning Process

Ranking of Travel Planning Steps *(1 = First step, 9 = Last step)*	Mean Ranking			
	American Prospects	American Non-prospects	Canadian Prospects	Canadian Non-prospects
Select the destination	3.9	2.3	3.1	2.7
Research online travel reviews/ratings	4.4	4.8	4.4	4.5
Set vacation budget	4.8	4.5	4.3	4.4
Pick type of vacation (cruise, beach, golf, etc.)	4.8	3.6	4.6	4.6
Talk to friends and family about possible vacation plans	5.2	4.1	5.0	4.6
Compare prices/features for possible travel services providers	5.4	4.8	4.9	4.5
Decide on vacation activities	5.7	5.5	6.0	5.6
Book accommodations/transportation	6.0	5.7	5.9	5.7
Use AI for travel inspiration/itinerary planning/research a destination	6.0	8.0	6.9	7.6
Talk to a traditional travel advisor	6.2	6.9	6.5	6.0

1st Step 2nd Step 3rd Step

Base: American prospects (n=732); Canadian prospects (n=542)

Source: MMGY's 2025 *Portrait of American and Canadian International Travelers*™

All Travelers

MMGY

Booking.com and Expedia are significantly more popular among prospects compared to non-prospects, especially American prospects.*

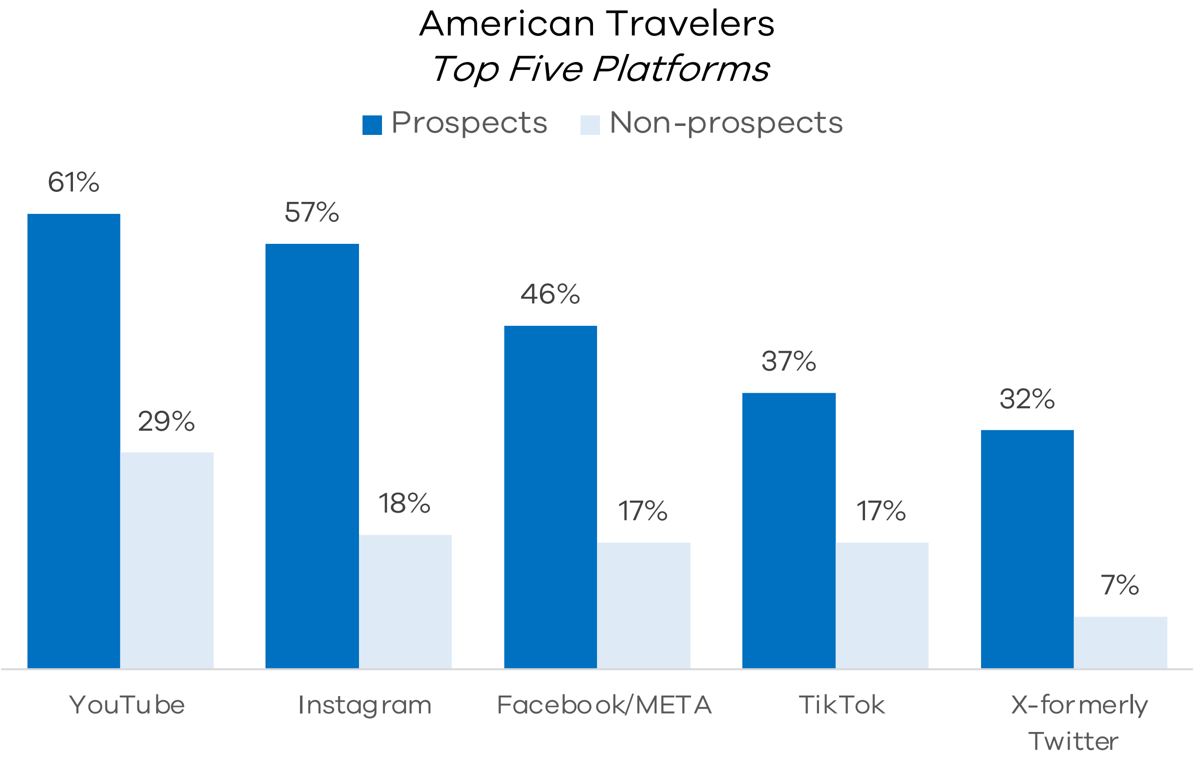
Top Websites Used to Obtain International Travel Information ***American Travelers***	**Prospects**	**Non-prospects**
Booking.com	59%	30%
Expedia	52%	30%
YouTube	52%	24%
Hotels.com	48%	20%
Tripadvisor	45%	31%
Google Travel	42%	22%
Trivago	37%	11%
Specific hotel brand website (such as Hilton/Marriott)	33%	42%

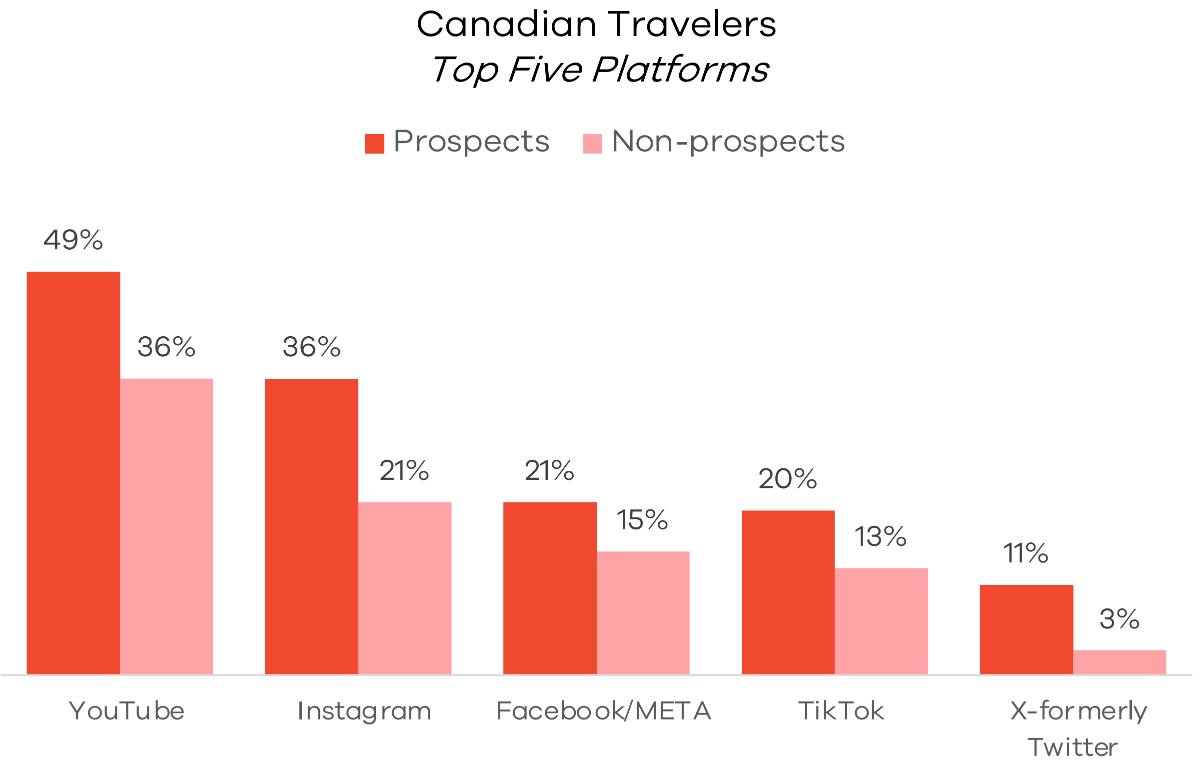
Top Websites Used to Obtain International Travel Information ***Canadian Travelers***	**Prospects**	**Non-prospects**
Expedia	55%	51%
Booking.com	44%	39%
YouTube	43%	39%
Tripadvisor	43%	37%
Google Travel	34%	29%
Trivago	29%	19%
Hotels.com	28%	31%
Specific airline brand website (such as Delta/British Airways)	25%	28%

*See appendix for full data
Base: American prospects (n=732); Canadian prospects (n=542)
Source: MMGY's 2025 *Portrait of American and Canadian International Travelers*TM

YouTube and Instagram are the most popular social media platforms for travel planning, with prospects significantly more likely to use social media than non-prospects.*

Which Social Media Platforms Do You Use When Planning Travel?





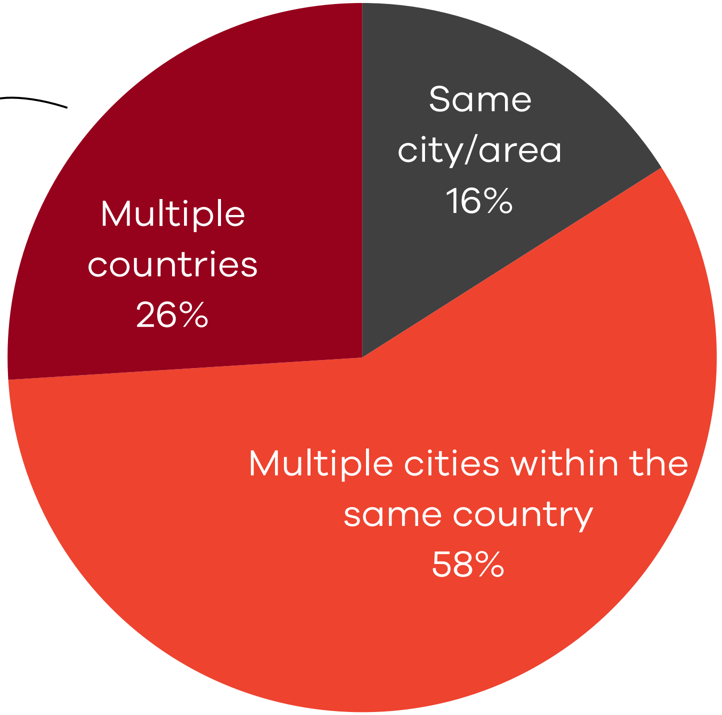
*See appendix for full data
Base: International travelers who regularly use social media: American prospects (n=718); Canadian prospects (n=523)
Source: MMGY's 2025 *Portrait of American and Canadian International Travelers*™

International Travel Preferences

Eight in 10 prospects from America and Canada prefer to visit multiple locations on their vacations abroad.

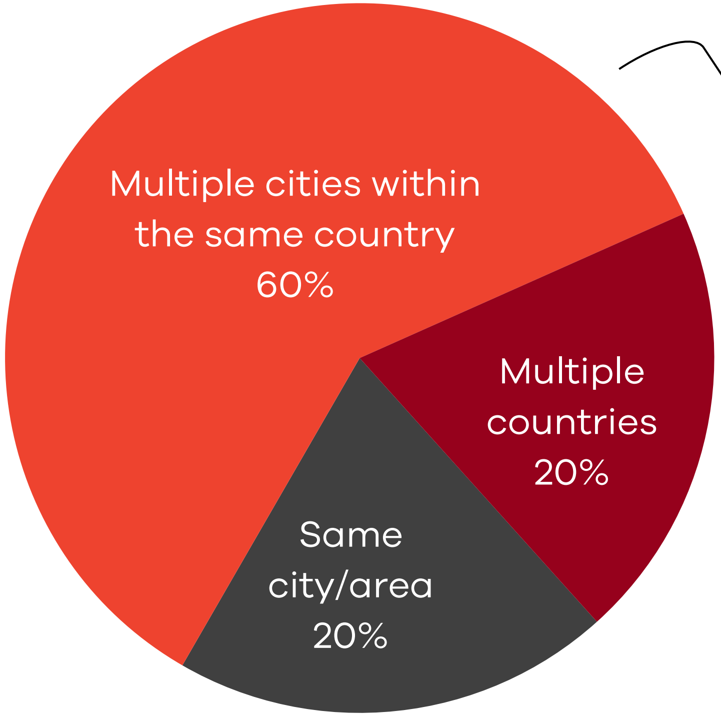
American Travelers

84%
prefer to visit multiple locations. (vs. **78%** Non-prospects)



Canadian Travelers

80%
prefer to visit multiple locations. (vs. **73%** Non-prospects)



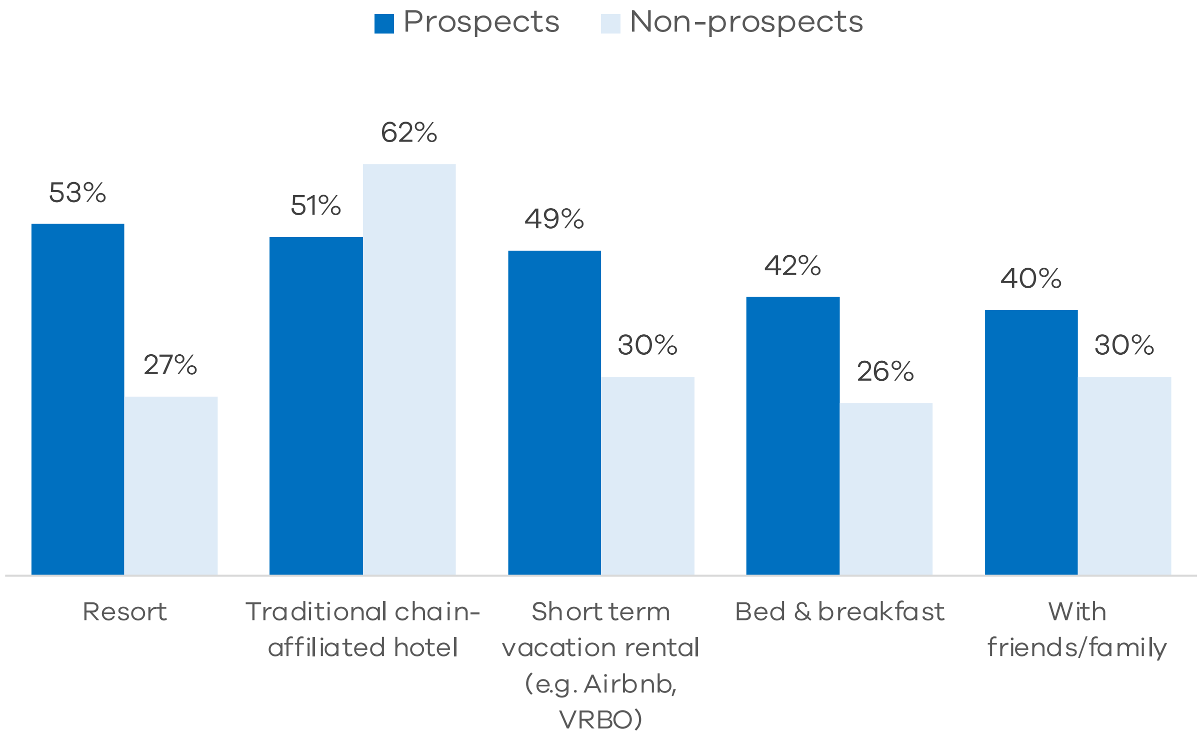
All Travelers

Base: American prospects (n=732); Canadian prospects (n=542)
Source: MMGY's 2025 *Portrait of American and Canadian International Travelers*™

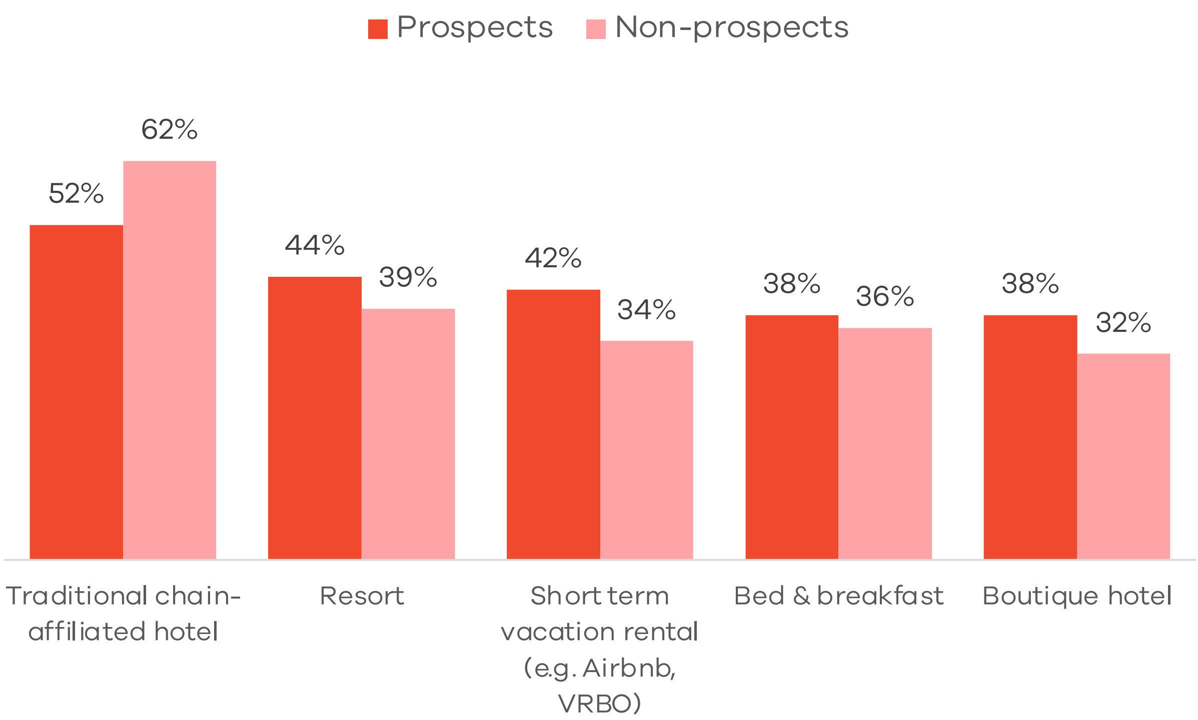
Resorts and traditional hotels are the top accommodation types for all prospects, although resorts emerge as significantly more popular among American prospects compared to non-prospects.

Which Accommodation Type Are You Likely to Use on Your International Vacations?

American Travelers
Top Five Accommodations



Canadian Travelers
Top Five Accommodations



*See appendix for full data
Base: American prospects (n=732); Canadian prospects (n=542)
Source: MMGY's 2025 *Portrait of American and Canadian International Travelers*™

Sustainability in Travel

All Travelers

American Prospects

55%

Vs. 17% for Non-prospects

Canadian Prospects

37%

Vs. 19% for Non-prospects

indicate that they have avoided a destination, hotel or transportation option because they felt that it was not committed to sustainable practices.

American Prospects

Gen Zers	Millennials	Gen Xers	Boomers	<$100K	$100K+	Solo Female	Solo Male
62%	68%	58%	16%	48%	60%	46%	54%

Canadian Prospects

Gen Zers	Millennials	Gen Xers	Boomers	<$100K	$100K+	Solo Female	Solo Male
57%	54%	28%	9%	41%	33%	23%	48%

Largest value has been underlined.

American Prospects

65%

Vs. 27% for Non-prospects

Canadian Prospects

49%

Vs. 30% for Non-prospects

indicate that a travel provider's focus on sustainability and environmental considerations impacts their travel decision-making.

American Prospects

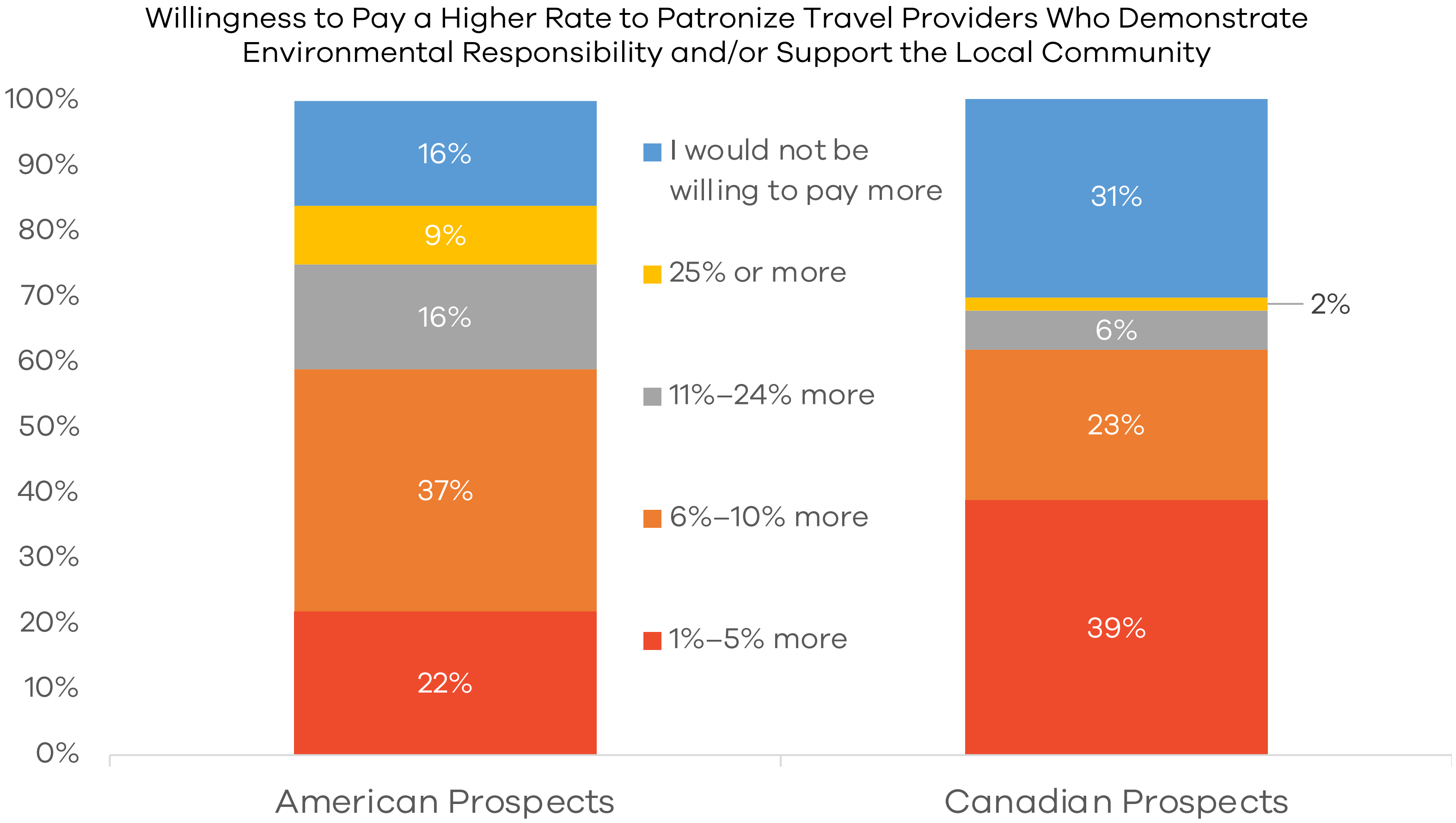
Gen Zers	Millennials	Gen Xers	Boomers	<$100K	$100K+	Solo Female	Solo Male
54%	<u>84%</u>	71%	23%	49%	75%	51%	73%

Canadian Prospects

Gen Zers	Millennials	Gen Xers	Boomers	<$100K	$100K+	Solo Female	Solo Male
<u>68%</u>	64%	40%	25%	53%	46%	37%	62%

Largest value has been underlined.

Among prospects, 84% of Americans and 70% of Canadians are willing to pay more for environmentally responsible travel service providers.



KEY TAKEAWAYS:

- All prospects are more likely than non-prospects to prioritize and patronize environmentally friendly travel service providers.
- Millennials are the most willing to pay extra for sustainable travel providers, with American international travelers more likely to pursue eco-friendly vacation practices than their Canadian counterparts.

Base: American prospects (n=732); Canadian prospects (n=542)
Source: MMGY's 2025 *Portrait of American and Canadian International Travelers*™

All Travelers

American Prospects

61%

Vs. **24%** for Non-prospects

Canadian Prospects

41%

Vs. **21%** for Non-prospects

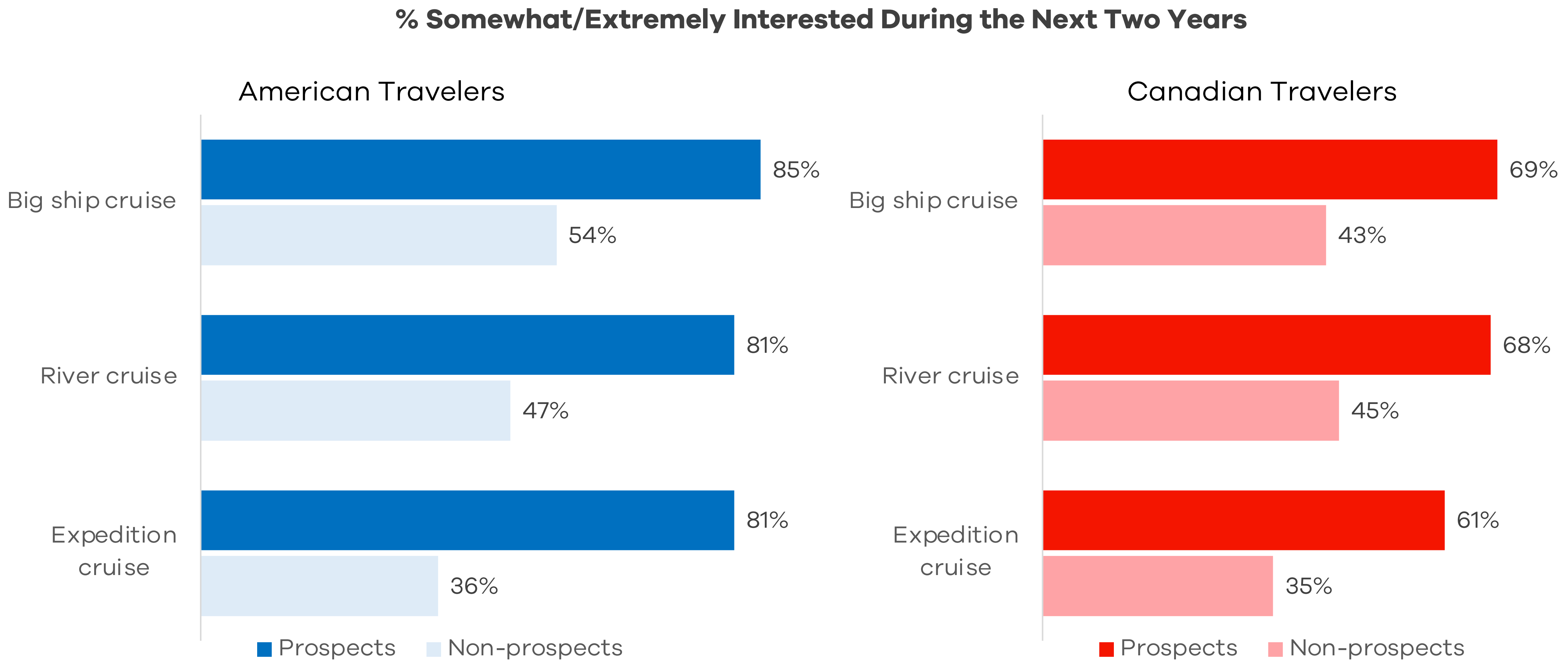
agree that they would be willing to pay an extra $100 for a flight to help reduce their carbon footprint.

	Gen Zers	Millennials	Gen Xers	Boomers	<$100K	$100K+	Solo Female	Solo Male
American Prospects	56%	<u>78%</u>	66%	21%	47%	70%	43%	68%
Canadian Prospects	47%	<u>55%</u>	33%	23%	42%	40%	28%	43%

Largest value has been underlined.

Cruising

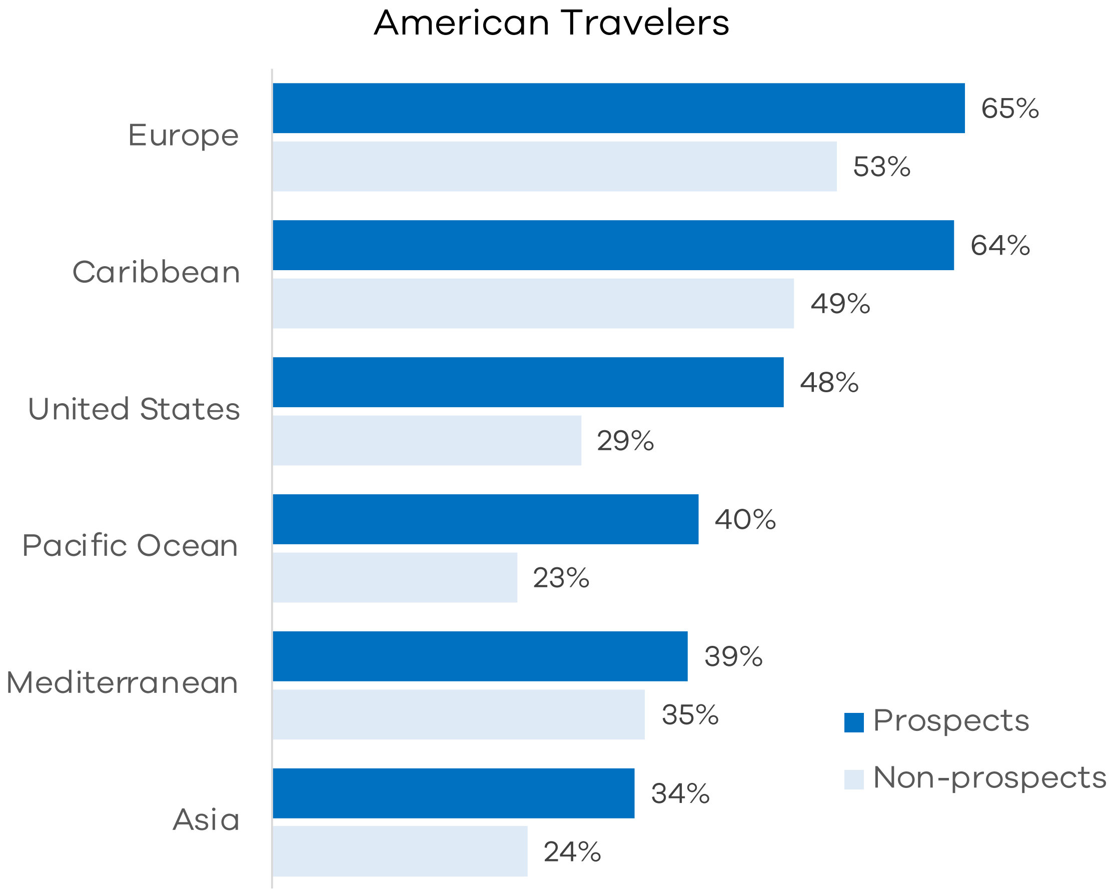
Prospects are significantly more interested in all types of cruising compared to non-prospects.

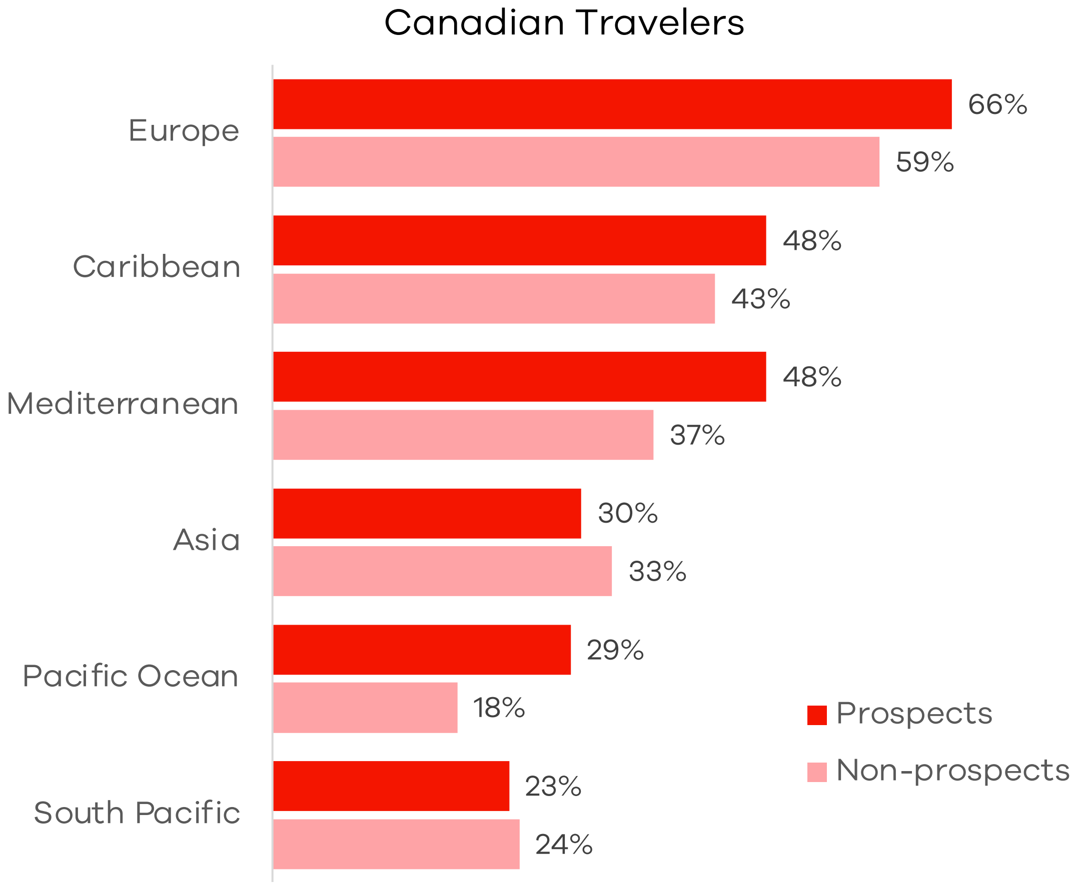


Base: American prospects (n=732); Canadian prospects (n=542)
Source: MMGY's 2025 *Portrait of American and Canadian International Travelers*™

Europe is the top cruise destination for both American and Canadian prospects. The Caribbean and Mediterranean are also very popular regions among these travelers.

Top 6 Regions Interested in Cruising





All Travelers

*See appendix for full data

Base: American prospects (n=732); Canadian prospects (n=542)

Source: MMGY's 2025 *Portrait of American and Canadian International Travelers*TM


Organized
Group Tours

Group tours are significantly more popular for prospects compared to non-prospects.

% Somewhat/Extremely Likely to Take a Vacation as Part of a Multiday Organized Group Tour While Traveling Internationally During the Next Two years

American Prospects	Canadian Prospects
73%	53%

American Non-prospects	Canadian Non-prospects
40%	34%

American Solo Female	American Solo Male	Canadian Solo Female	Canadian Solo Male
69%	74%	57%	56%

KEY TAKEAWAYS:

- American Millennials (87%) and Canadian Gen Zers (73%) are the most likely to vacation as part of an organized group tour in the next two years, showcasing the appeal of these trips abroad to younger generations.
- Seeing multiple sites and the easier planning of group tours are the most appealing factors for all travelers, while Gen Zers find the connection with like-minded travelers to be a major motivator.
- Higher-income ($100K+) American prospects are also significantly more likely to vacation in an organized group tour than lower-income (<$100K) prospects (81% vs. 59%). Alternatively, group tours are more popular among lower-income Canadian prospects vs. higher-income prospects (55% vs. 50%).

Base: American prospects (n=732); Canadian prospects (n=542)
Source: MMGY's 2025 *Portrait of American and Canadian International Travelers*™

Reputation of the tour company is most important to all prospects, with American prospects valuing convenient communication significantly more than non-prospects.

Influential When Choosing a Tour Company ***American Travelers***	**Prospects**	**Non-prospects**
Reputation of the tour company	91%	90%
Convenient communication with the tour company	91%	80%
Previous experience with the company	90%	75%
Departure dates that suit me	89%	83%
Range of itineraries	89%	80%
Value for the price	89%	82%
Traveler reviews (e.g. from Tripadvisor)	87%	73%
Recommendations from a travel advisor	85%	67%
Recommendations from friends/family	85%	70%

Influential When Choosing a Tour Company ***Canadian Travelers***	**Prospects**	**Non-prospects**
Reputation of the tour company	91%	87%
Departure dates that suit me	91%	85%
Value for the price	91%	88%
Convenient communication with the tour company	88%	82%
Range of itineraries	88%	88%
Previous experience with the company	85%	72%
Recommendations from a travel advisor	83%	57%
Traveler reviews (e.g. from Tripadvisor)	80%	76%
Recommendations from friends/family	80%	73%

Base: Travelers who have or are likely to vacation in multi-day group tour; American prospects (n=559); Canadian prospects (n=316)
Source: MMGY's 2025 *Portrait of American and Canadian International Travelers*™

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Organized Group Tour Preferences

Planning Group Tours *American Travelers*	Prospects	Non-prospects
Do First		
Choose a destination and see what companies go there	63%	70%
Choose a company and see what destinations they offer	37%	30%
Pricing Preferences		
Prefer to see all-inclusive costs	76%	63%
Prefer to see separate land and air costs	24%	37%
Maximum Number of Fellow Passengers Would Want on an Organized Group Tour		
Fewer than 20	39%	50%
20–30	34%	32%
31–40	18%	17%
41+	5%	0%
It doesn't matter	5%	2%

	Prospects	Non-prospects
Do First		
Choose a destination and see what companies go there	67%	79%
Choose a company and see what destinations they offer	33%	21%
Pricing Preferences		
Prefer to see all-inclusive costs	70%	66%
Prefer to see separate land and air costs	30%	34%
Maximum Number of Fellow Passengers Would Want on an Organized Group Tour		
Fewer than 20	50%	54%
20–30	32%	31%
31–40	10%	6%
41+	3%	6%
It doesn't matter	5%	3%

NA = Not asked in previous years

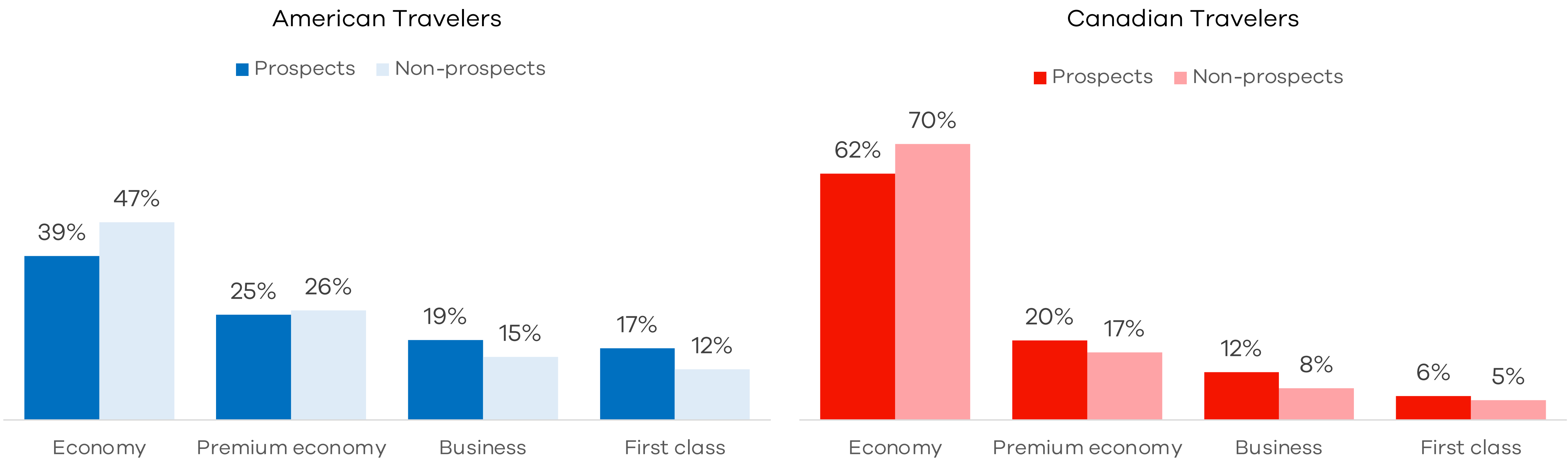
Base: Travelers who have or are likely to vacation in multi-day group tour; American prospects (n=559); Canadian prospects (n=316)

Source: MMGY's 2025 *Portrait of American and Canadian International Travelers*™

Flight Preferences

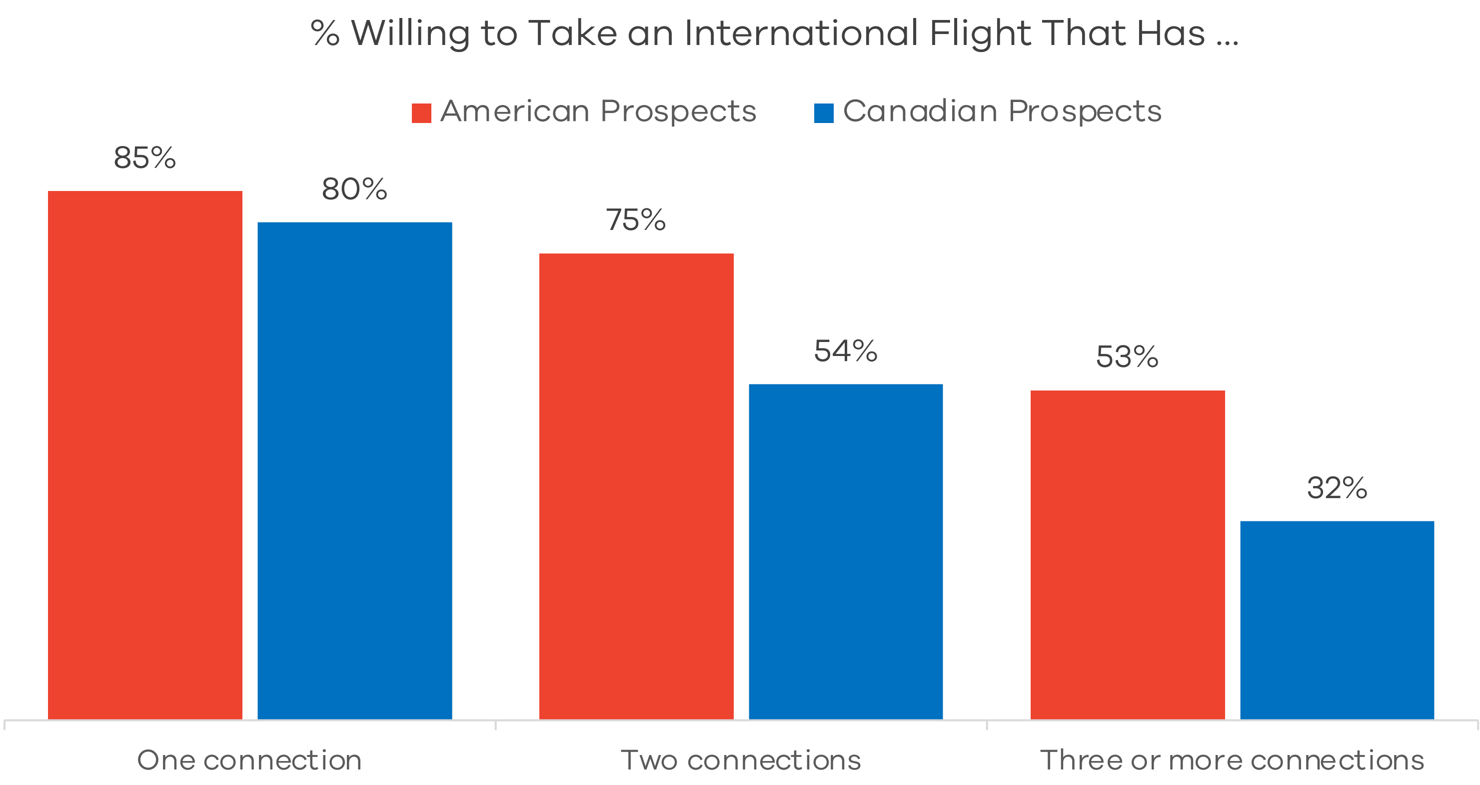
Prospects are slightly more likely to fly business or first class than non-prospects.

What Percentage of Your International Flights Are ...?



Base: American prospects (n=732); Canadian prospects (n=542)
Source: MMGY's 2025 *Portrait of American and Canadian International Travelers*TM

Prospects are very willing to take flights with one or more connection, with Americans more willing to take extra connections for their vacations abroad.



KEY TAKEAWAYS:

- While over 80% of prospects find the cost of airfare influential, Americans are more willing to take flights with 2 or more connections than Canadians.
- American Millennials and Canadian Gen Zers are the most willing to take flights with multiple connections, showcasing the value they place on airfare savings.
- The strong willingness to take flights with multiple connections indicates the importance of international vacations for all travelers, with many willing to sacrifice the comfort of a direct flight to travel further abroad.

Base: American prospects (n=732); Canadian prospects (n=542)
Source: MMGY's 2025 *Portrait of American and Canadian International Travelers*™