MMGY Travel Intelligence

Fall Edition 2022

# PORTRAIT OF AMERICAN TRAVELERS®

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# Methodology

MMGY Global's *Portrait of American Travelers®* deals exclusively with leisure travel. The travel trend information presented in this report was obtained from interviews with 4,551 U.S. adults in July 2022.

This report primarily focuses on active leisure travelers, defined as those who intend to take at least one overnight leisure trip during the next 12 months. There were a total of 3,162 active leisure travelers. At the bottom of each slide, the "Base" will detail the audience represented in the data.

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.

The five generations of adults surveyed are defined below. Due to the small number of Silent/GI respondents, we did not include their individual results in this report.

| Generation | Age | % of Respondents |
|---|---|---|
| Gen Zs | 18–24 | 12% |
| Millennials | 25–40 | 30% |
| Gen Xers | 41–56 | 24% |
| Boomers | 57–75 | 30% |
| Silent/GI | 75+ | 4% |

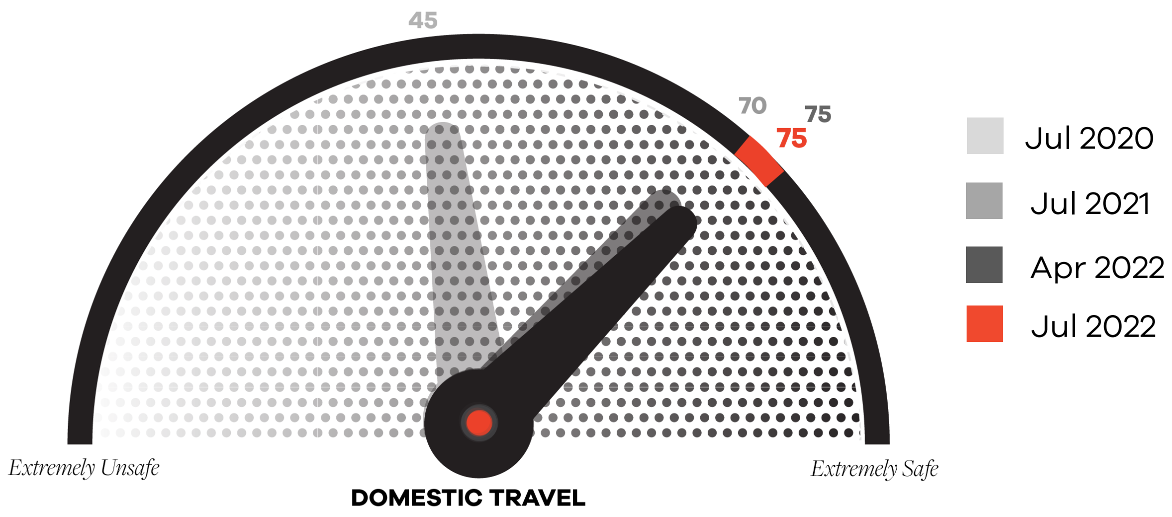
# Travel Outlook Snapshot

MMGY Travel Intelligence

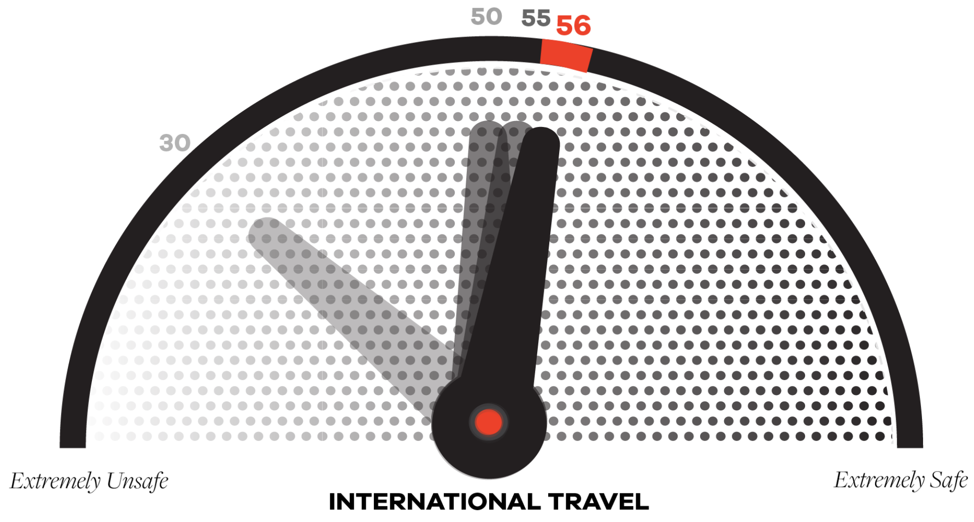
# Perceived Safety of Travel Has More Than Doubled Since the Start of the Global Pandemic

The **MMGY Global Travel Safety Barometer** is a sentiment tracking tool that measures Americans' perceptions of the safety of engaging in specific travel behaviors on a scale from 0 (Extremely Unsafe) to 100 (Extremely Safe).

## / Perceived safety of domestic travel is up 5 points from one year ago.




## / Perceived safety of international travel is up 6 points from one year ago.




**Base:** U.S. adults (n=4,551)
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"



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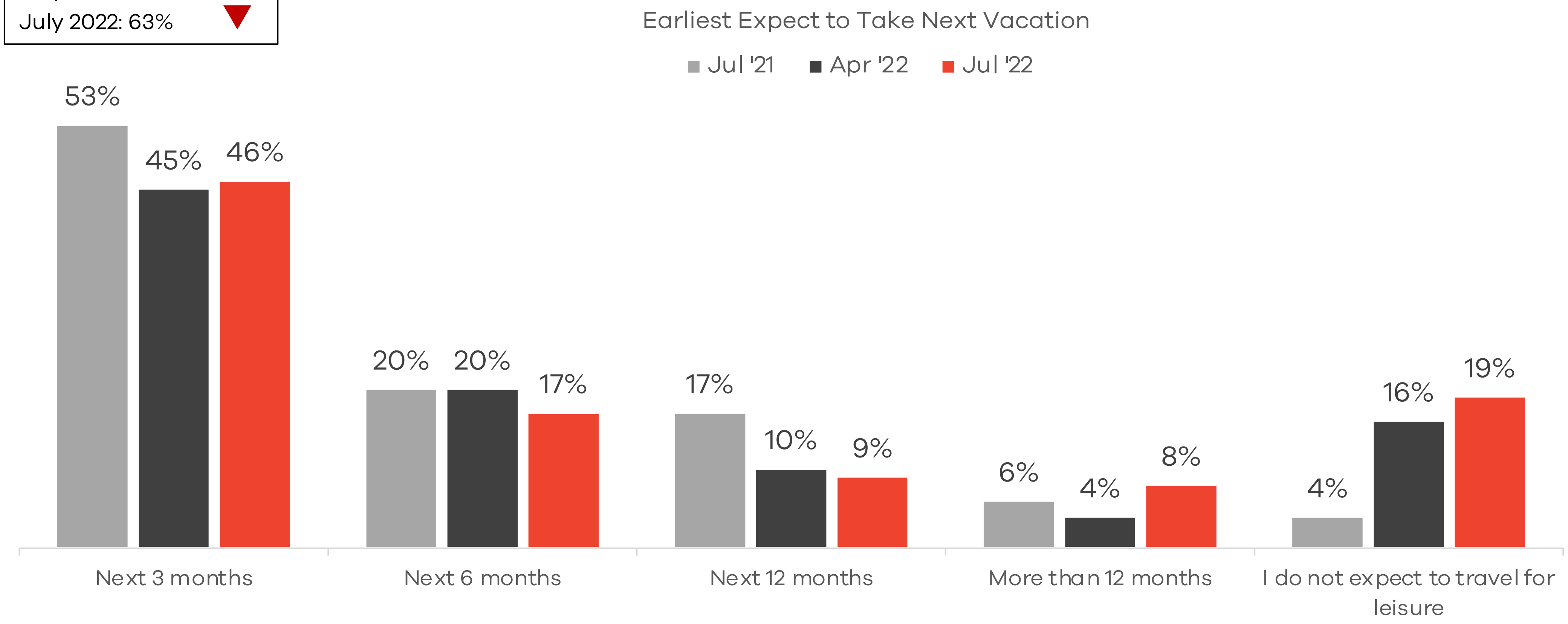
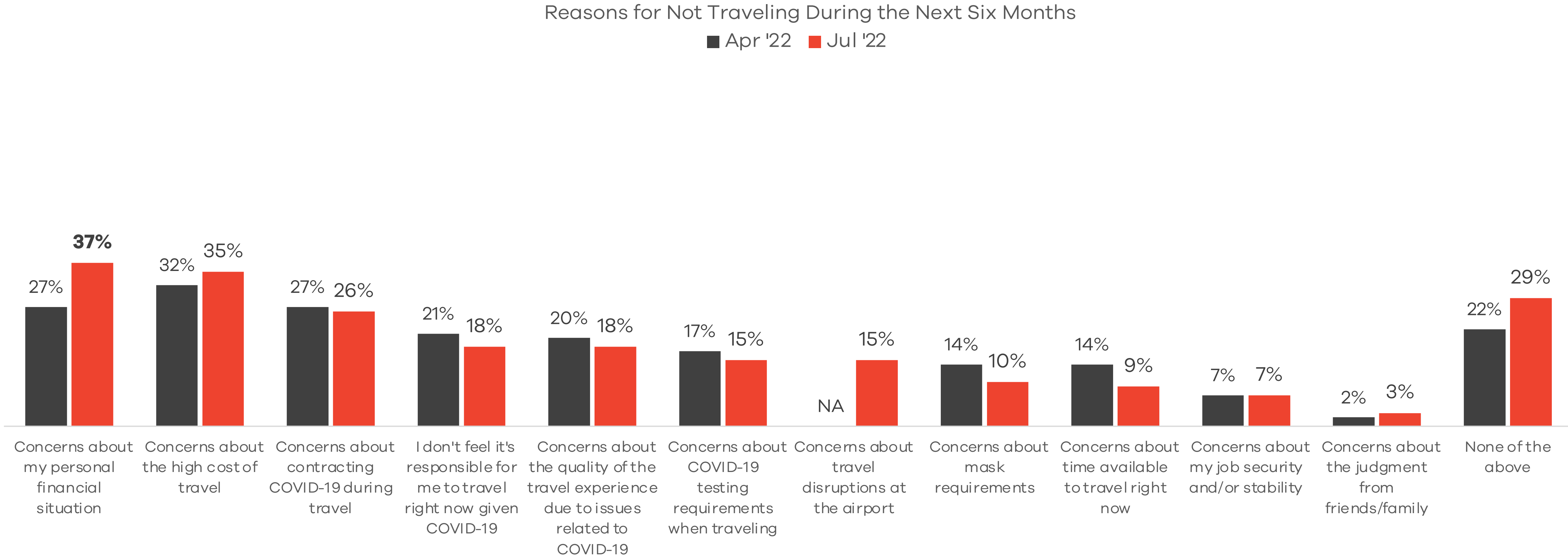
# Travel Intentions Have Declined From One Year Ago But Are Steady From Last Quarter

Sum of Next 6 Months
July 2021: 73%
July 2022: 63%




**Base:** U.S. adults (July 2022: n=4,551)
**Source:** MMGY Global's 2022 *Portrait of American Travelers®* "Fall Edition"

# Concerns About Personal Finances Have Increased Significantly From Just Three Months Ago




NA – Option was not asked in April 2022
Data in bold indicates a statistically significant difference from April 2022.

**Base:** Active leisure travelers without travel plans during the next six months (Apr 2022: n=663; July 2022: n=425)

**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"



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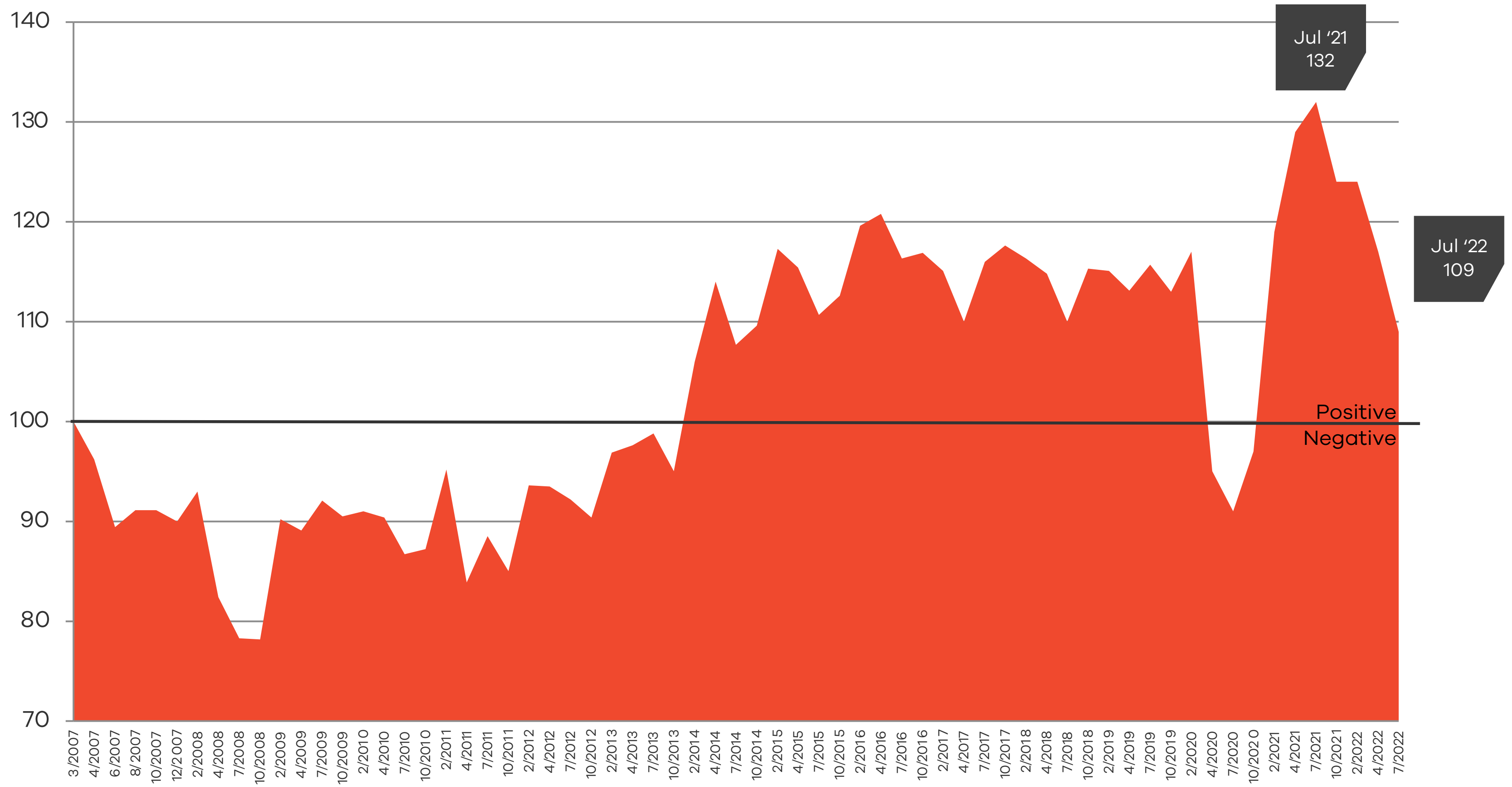
# Traveler Sentiment Index™ (TSI): Down From One Year Ago

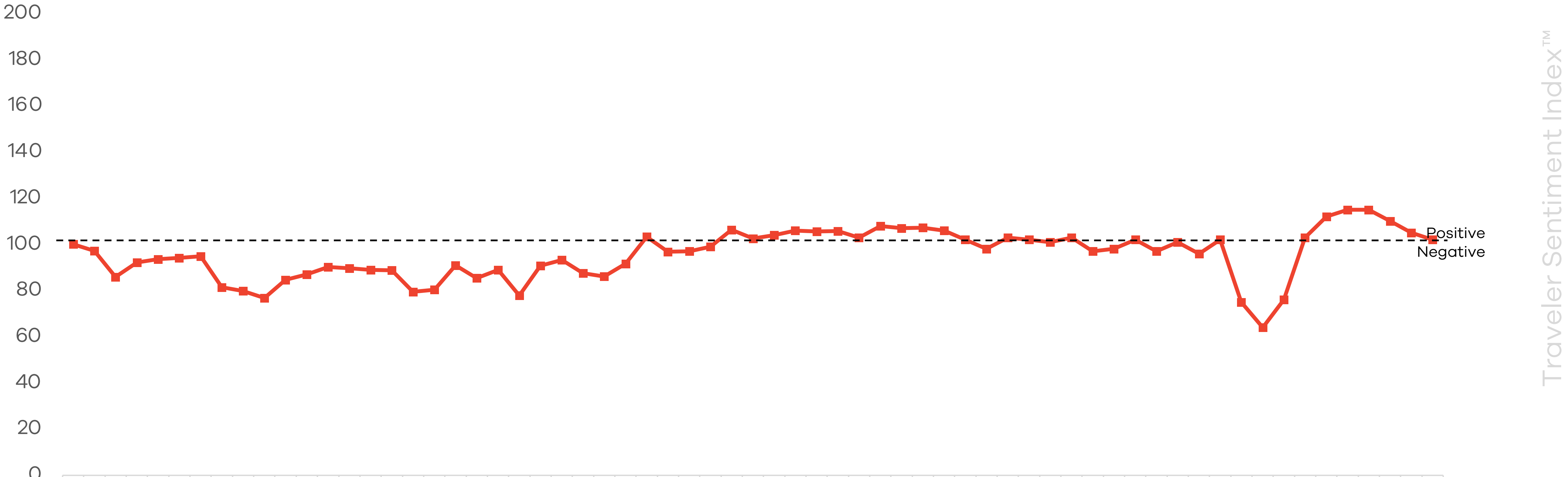



The Traveler Sentiment Index™ (TSI) consists of six variables, including: interest in travel, time available for travel, personal finances available for travel, affordability of travel, quality of service and safety of travel. It provides a glimpse into how U.S. adults are feeling about travel this year compared to the same time a year ago. MMGY Travel Intelligence has calculated and reported the TSI quarterly since March 2007; therefore, we are able to compare the indices to February 2020 (pre-pandemic levels) to track how the traveler mindset has changed throughout the COVID-19 pandemic.



**Base:** U.S. adults (n=4,551)
**Source:** MMGY Global's *travelhorizons*™/2022 *Portrait of American Travelers*® "Fall Edition"

# Index 1: Interest in Travel



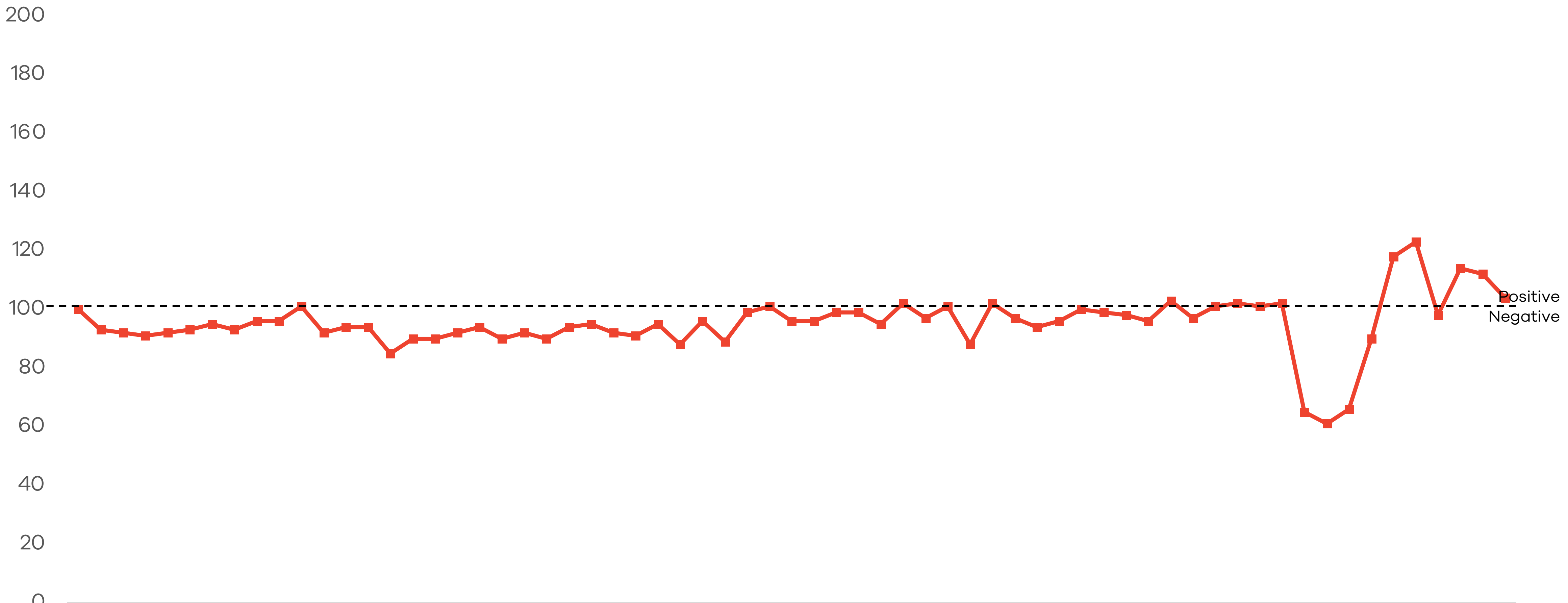

| | Mar 07 | Apr 07 | Jun 07 | Aug 07 | Oct 07 | Dec 07 | Feb 08 | Apr 08 | Jul 08 | Oct 08 | Feb 09 | Apr 09 | Jul 09 | Oct 09 | Feb 10 | Apr 10 | Jul 10 | Oct 10 | Feb 11 | Apr 11 | Jul 11 | Oct 11 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| U.S. Adults | 100 | 97 | 86 | 92 | 94 | 94 | 95 | 82 | 80 | 77 | 85 | 87 | 90 | 90 | 89 | 89 | 80 | 80 | 91 | 85 | 89 | 78 |

| | Feb 12 | Apr 12 | Jul 12 | Oct 12 | Feb 13 | Apr 13 | Jul 13 | Oct 13 | Feb 14 | Apr 14 | Jul 14 | Oct 14 | Feb 15 | Apr 15 | Jul 15 | Oct 15 | Feb 16 | Apr 16 | Jul 16 | Oct 16 | Feb 17 | Apr 17 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| U.S. Adults | 91 | 93 | 88 | 86 | 92 | 103 | 97 | 97 | 99 | 106 | 103 | 104 | 106 | 106 | 106 | 103 | 108 | 107 | 107 | 106 | 102 | 98 |

| | Jul 17 | Oct 17 | Feb 18 | Apr 18 | Jul 18 | Oct 18 | Feb 19 | Apr 19 | Jul 19 | Oct 19 | Feb 20 | Apr 20 | Jul 20 | Oct 20 | Feb 21 | Apr 21 | Jul 21 | Oct 21 | Feb 22 | Apr 22 | Jul 22 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| U.S. Adults | 103 | 102 | 101 | 103 | 97 | 98 | 102 | 97 | 101 | 96 | 102 | 75 | 64 | 76 | 103 | 112 | 115 | 115 | 110 | 105 | 102 |

**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"

# Index 2: Safety of Travel




| | Mar 07 | Apr 07 | Jun 07 | Aug 07 | Oct 07 | Dec 07 | Feb 08 | Apr 08 | Jul 08 | Oct 08 | Feb 09 | Apr 09 | Jul 09 | Oct 09 | Feb 10 | Apr 10 | Jul 10 | Oct 10 | Feb 11 | Apr 11 | Jul 11 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| U.S. Adults | 100 | 93 | 92 | 91 | 92 | 93 | 95 | 93 | 96 | 96 | 101 | 92 | 94 | 94 | 85 | 90 | 90 | 92 | 94 | 90 | 92 |

| | Oct 11 | Feb 12 | Apr 12 | Jul 12 | Oct 12 | Feb 13 | Apr 13 | Jul 13 | Oct 13 | Feb 14 | Apr 14 | Jul 14 | Oct 14 | Feb 15 | Apr 15 | Jul 15 | Oct 15 | Feb 16 | Apr 16 | Jul 16 | Oct 16 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| U.S. Adults | 90 | 94 | 95 | 92 | 91 | 95 | 88 | 96 | 89 | 99 | 101 | 96 | 96 | 99 | 99 | 95 | 102 | 97 | 101 | 88 | 102 |

| | Feb 17 | Apr 17 | Jul 17 | Oct 17 | Feb 18 | Apr 18 | Jul 18 | Oct 18 | Feb 19 | Apr 19 | Jul 19 | Oct 19 | Feb 20 | Apr 20 | Jul 20 | Oct 20 | Feb 21 | Apr 21 | Jul 21 | Oct 21 | Feb 22 | Apr 22 | Jul 22 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| U.S. Adults | 97 | 94 | 96 | 100 | 99 | 98 | 96 | 103 | 97 | 101 | 102 | 101 | 102 | 65 | 61 | 66 | 90 | 118 | 123 | 98 | 114 | 112 | 104 |

Traveler Sentiment Index™

**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"

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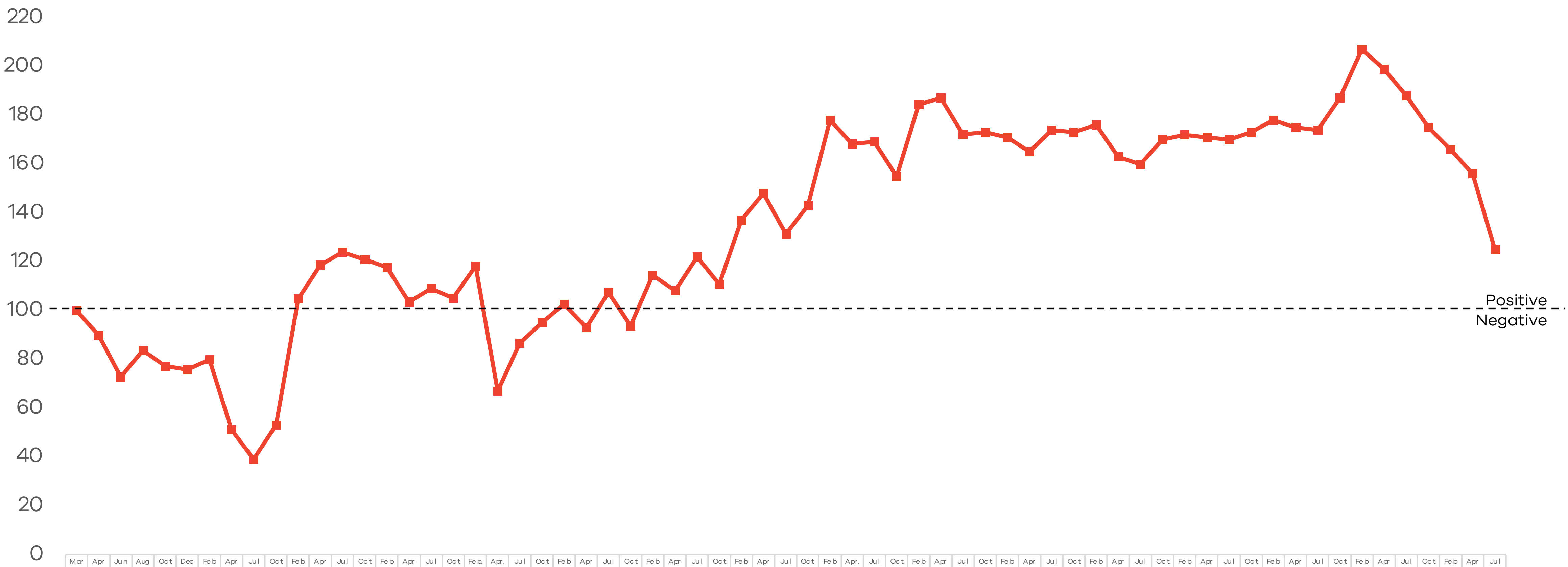
# Index 3: Perceived Affordability of Travel




| | Mar 07 | Apr 07 | Jun 07 | Aug 07 | Oct 07 | Dec 07 | Feb 08 | Apr 08 | Jul 08 | Oct 08 | Feb 09 | Apr 09 | Jul 09 | Oct 09 | Feb 10 | Apr 10 | Jul 10 | Oct 10 | Feb. 11 | Apr. 11 | Jul 11 | Oct 11 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| U.S. Adults | 100 | 90 | 73 | 84 | 77 | 76 | 80 | 51 | 39 | 53 | 105 | 119 | 124 | 121 | 118 | 104 | 109 | 105 | 118 | 67 | 87 | 95 |

| | Feb 12 | Apr 12 | Jul 12 | Oct 12 | Feb 13 | Apr 13 | Jul 13 | Oct 13 | Feb 14 | Apr 14 | Jul 14 | Oct 14 | Feb 15 | Apr. 15 | Jul 15 | Oct 15 | Feb 16 | Apr 16 | Jul 16 | Oct 16 | Feb 17 | Apr 17 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| U.S. Adults | 103 | 93 | 107 | 94 | 115 | 108 | 122 | 111 | 137 | 148 | 131 | 143 | 178 | 168 | 169 | 155 | 184 | 187 | 172 | 173 | 171 | 165 |

| | Jul 17 | Oct 17 | Feb 18 | Apr 18 | Jul 18 | Oct 18 | Feb 19 | Apr 19 | Jul 19 | Oct 19 | Feb 20 | Apr 20 | Jul 20 | Oct 20 | Feb 21 | Apr 21 | Jul 21 | Oct 21 | Feb 22 | Apr 22 | Jul 22 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| U.S. Adults | 174 | 173 | 176 | 163 | 160 | 170 | 172 | 171 | 170 | 173 | 178 | 175 | 174 | 187 | 207 | 199 | 188 | 175 | 166 | 156 | 125 |

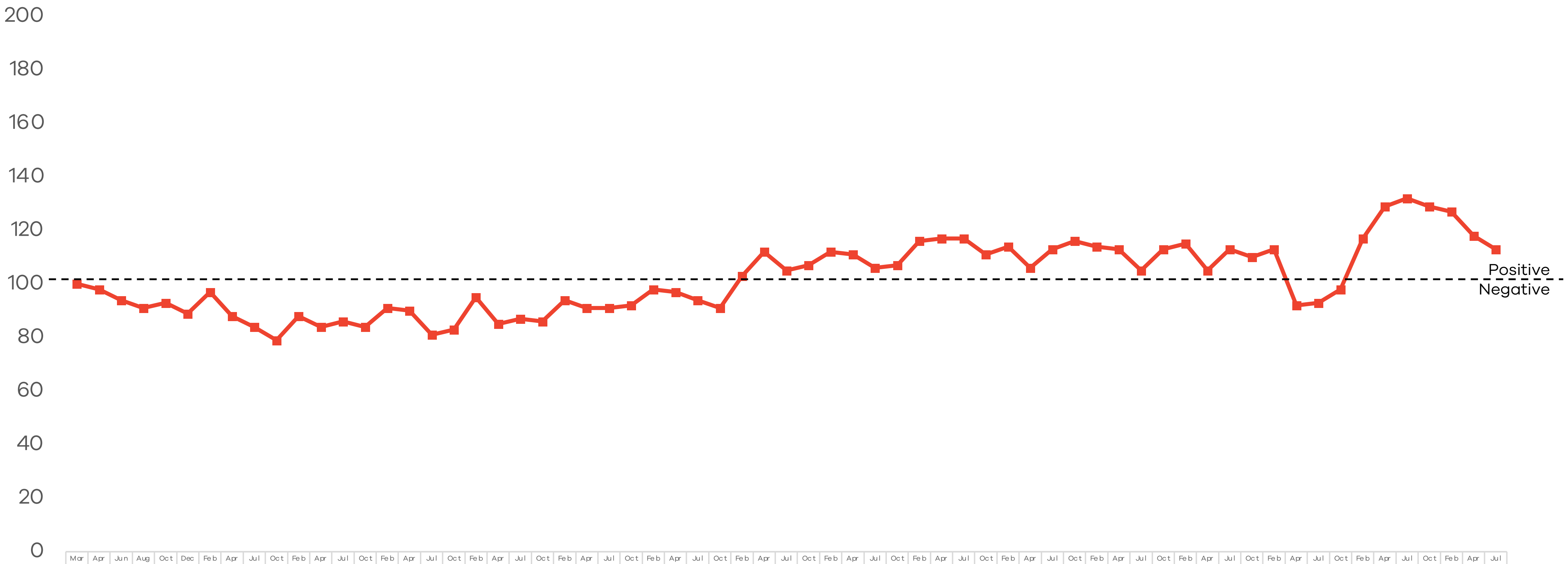
Traveler Sentiment Index™

MMGY Travel Intelligence



**Source:** MMGY Global's 2022 *Portrait of American Travelers®* "Fall Edition"

# Index 4: Time Available for Travel




| | Mar 07 | Apr 07 | Jun 07 | Aug 07 | Oct 07 | Dec 07 | Feb 08 | Apr 08 | Jul 08 | Oct 08 | Feb 09 | Apr 09 | Jul 09 | Oct 09 | Feb 10 | Apr 10 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| U.S. Adults | 100 | 98 | 94 | 91 | 93 | 89 | 97 | 88 | 84 | 79 | 88 | 84 | 86 | 84 | 91 | 90 |

| | Jul 10 | Oct 10 | Feb 11 | Apr 11 | Jul 11 | Oct 11 | Feb 12 | Apr 12 | Jul 12 | Oct 12 | Feb 13 | Apr 13 | Jul 13 | Oct 13 | Feb 14 | Apr 14 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| U.S. Adults | 81 | 83 | 95 | 85 | 87 | 86 | 94 | 91 | 91 | 92 | 98 | 97 | 94 | 91 | 103 | 112 |

| | Jul 14 | Oct 14 | Feb 15 | Apr 15 | Jul 15 | Oct 15 | Feb 16 | Apr 16 | Jul 16 | Oct 16 | Feb 17 | Apr 17 | Jul 17 | Oct 17 | Feb 18 | Apr 18 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| U.S. Adults | 105 | 107 | 112 | 111 | 106 | 107 | 116 | 117 | 117 | 111 | 114 | 106 | 113 | 116 | 114 | 113 |

| | Jul 18 | Oct 18 | Feb 19 | Apr 19 | Jul 19 | Oct 19 | Feb 20 | Apr 20 | Jul 20 | Oct 0 | Feb 21 | Apr 21 | Jul 21 | Oct 21 | Feb 22 | Apr 22 | Jul 22 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| U.S. Adults | 105 | 113 | 115 | 105 | 113 | 110 | 113 | 92 | 93 | 98 | 117 | 129 | 132 | 129 | 127 | 118 | 113 |

Traveler Sentiment Index™

**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"

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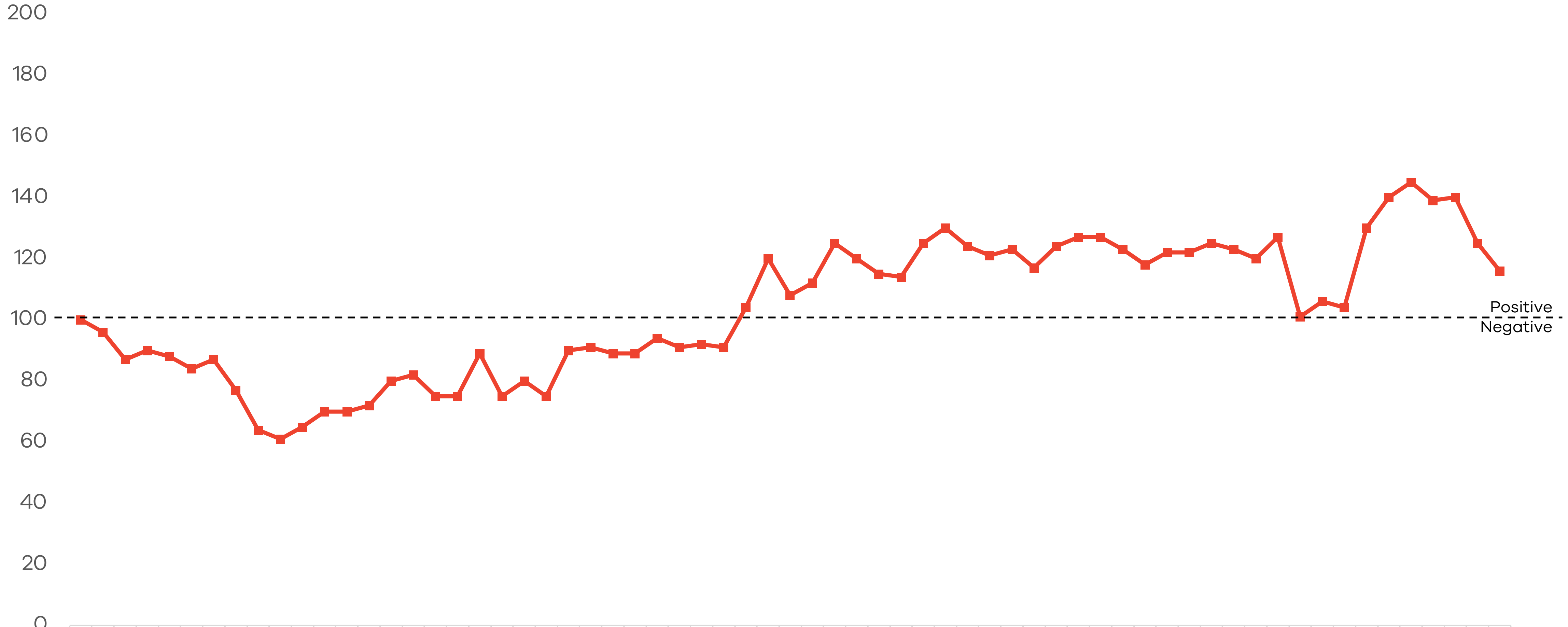
# Index 5: Personal Finances Available for Travel




| | Mar 07 | Apr 07 | Jun 07 | Aug 07 | Oct 07 | Dec 07 | Feb 08 | Apr 08 | Jul 08 | Oct 08 | Feb 09 | Apr 09 | Jul 09 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| U.S. Adults | 100 | 96 | 87 | 90 | 88 | 84 | 87 | 77 | 64 | 61 | 65 | 70 | 70 |

| | Oct 09 | Feb 10 | Apr 10 | Jul 10 | Oct 10 | Feb 11 | Apr 11 | Jul 11 | Oct 11 | Feb 12 | Apr 12 | Jul 12 | Oct 12 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| U.S. Adults | 72 | 80 | 82 | 75 | 75 | 89 | 75 | 80 | 75 | 90 | 91 | 89 | 89 |

| | Feb 13 | Apr 13 | Jul 13 | Oct 13 | Feb 14 | Apr 14 | Jul 14 | Oct 14 | Feb 15 | Apr 15 | Jul 15 | Oct 15 | Feb 16 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| U.S. Adults | 94 | 91 | 92 | 91 | 104 | 120 | 108 | 112 | 125 | 120 | 115 | 114 | 125 |

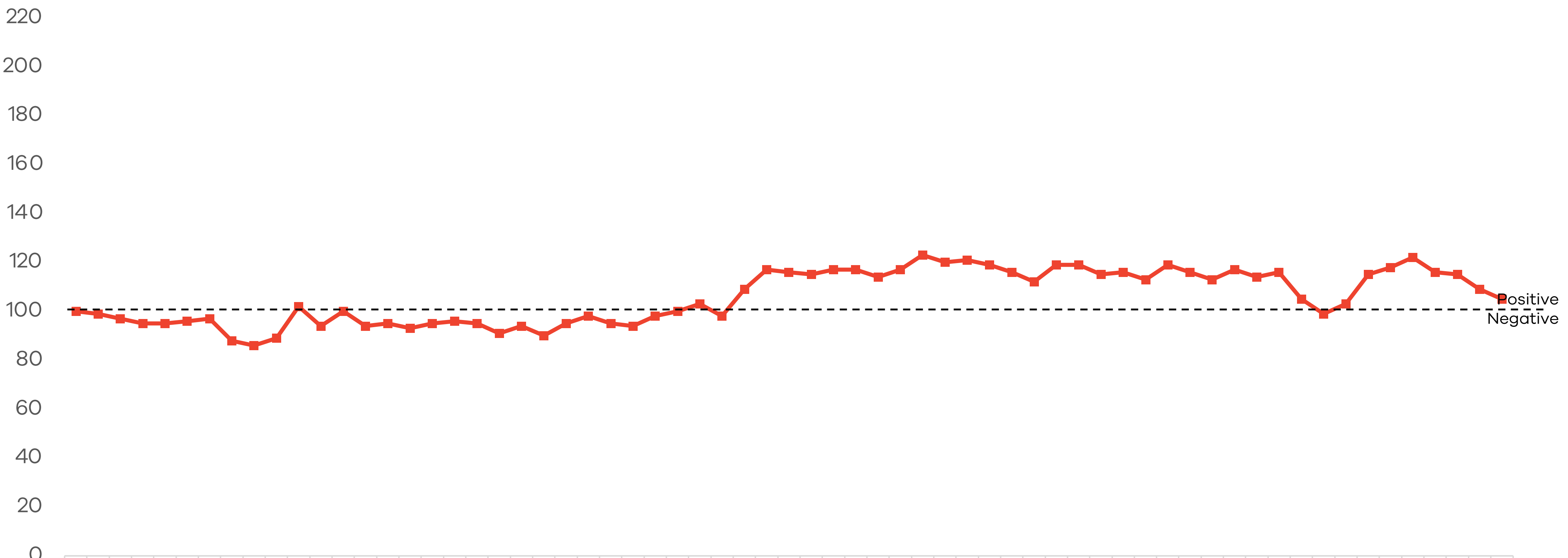
| | Apr 16 | Jul 16 | Oct 16 | Feb 17 | Apr 17 | Jul 17 | Oct 17 | Feb 18 | Apr 18 | Jul 18 | Oct 18 | Feb 19 | Apr 19 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| U.S. Adults | 130 | 124 | 121 | 123 | 117 | 124 | 127 | 127 | 123 | 118 | 122 | 122 | 125 |

| | Jul 19 | Oct 19 | Feb 20 | Apr 20 | Jul 20 | Oct 20 | Feb 21 | Apr 21 | Jul 21 | Oct 21 | Feb 22 | Apr 22 | Jul 22 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| U.S. Adults | 123 | 120 | 127 | 101 | 106 | 104 | 130 | 140 | 145 | 139 | 140 | 125 | 116 |

Traveler Sentiment Index™

**Source:** MMGY Global's 2022 *Portrait of American Travelers®* "Fall Edition"

# Index 6: Quality of Service




| | Mar 07 | Apr 07 | Jun 07 | Aug 07 | Oct 07 | Dec 07 | Feb 08 | Apr 08 | Jul 08 | Oct 08 | Feb 09 | Apr 09 | Jul 09 | Oct 09 | Feb 10 | Apr 10 | Jul 10 | Oct 10 | Feb 11 | Apr 11 | Jul 11 | Oct 11 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| U.S. Adults | 100 | 99 | 97 | 95 | 95 | 96 | 97 | 88 | 86 | 89 | 102 | 94 | 100 | 94 | 95 | 93 | 95 | 96 | 95 | 91 | 94 | 90 |

| | Feb 12 | Apr 12 | Jul 12 | Oct 12 | Feb 13 | Apr 13 | Jul 13 | Oct 13 | Feb 14 | Apr 14 | Jul 14 | Oct 14 | Feb 15 | Apr 15 | Jul 15 | Oct 15 | Feb 16 | Apr 16 | Jul 16 | Oct 16 | Feb 17 | Apr 17 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| U.S. Adults | 95 | 98 | 95 | 94 | 98 | 100 | 103 | 98 | 109 | 117 | 116 | 115 | 117 | 117 | 114 | 117 | 123 | 120 | 121 | 119 | 116 | 112 |

| | Jul 17 | Oct 17 | Feb 18 | Apr 18 | Jul 18 | Oct 18 | Feb 19 | Apr 19 | Jul 19 | Oct 19 | Feb 20 | Apr 20 | Jul 20 | Oct 20 | Feb 21 | Apr 21 | Jul 21 | Oct 21 | Feb 22 | Apr 22 | Jul 22 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| U.S. Adults | 119 | 119 | 115 | 116 | 113 | 119 | 116 | 113 | 117 | 114 | 116 | 105 | 99 | 103 | 115 | 118 | 122 | 116 | 115 | 109 | 105 |

Traveler Sentiment Index™



**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"

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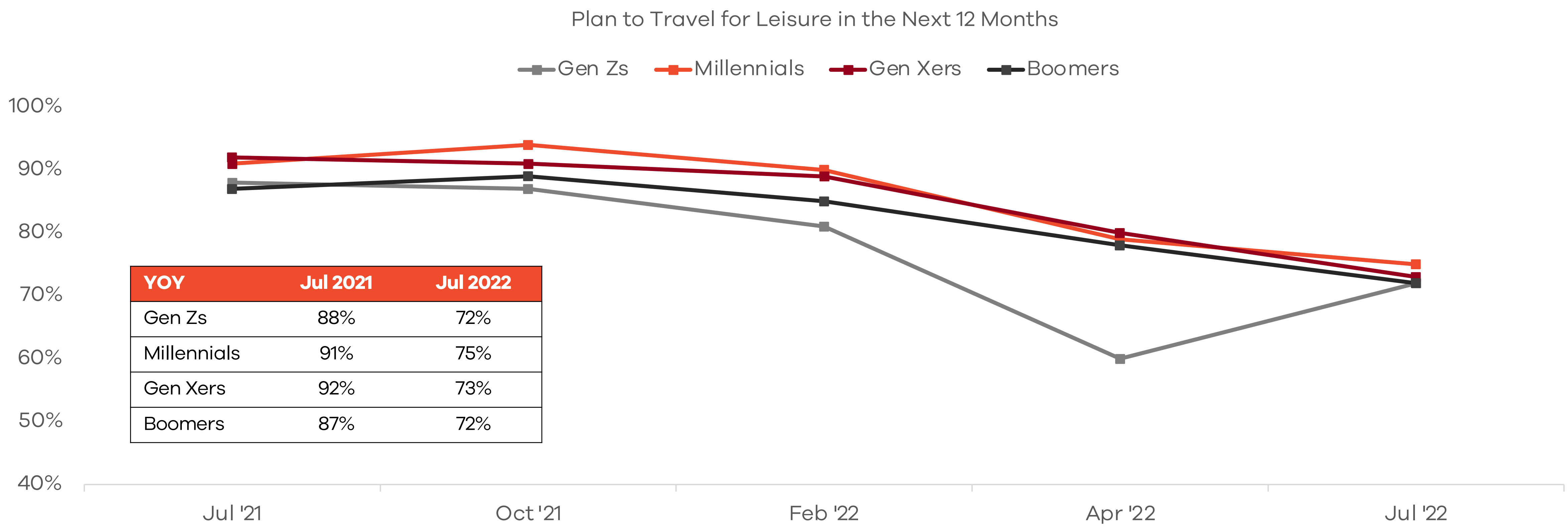
# All Generations Are Experiencing a Decline in Travel Intentions From One Year Ago




| YOY | Jul 2021 | Jul 2022 |
|---|---|---|
| Gen Zs | 88% | 72% |
| Millennials | 91% | 75% |
| Gen Xers | 92% | 73% |
| Boomers | 87% | 72% |

**Base:** U.S. adults (Gen Zs: n=518; Millennials: n=1,280; Gen Xers: n=1,105; Boomers: n=1,402)
**Source:** MMGY Global's 2022 *Portrait of American Travelers®* "Fall Edition"



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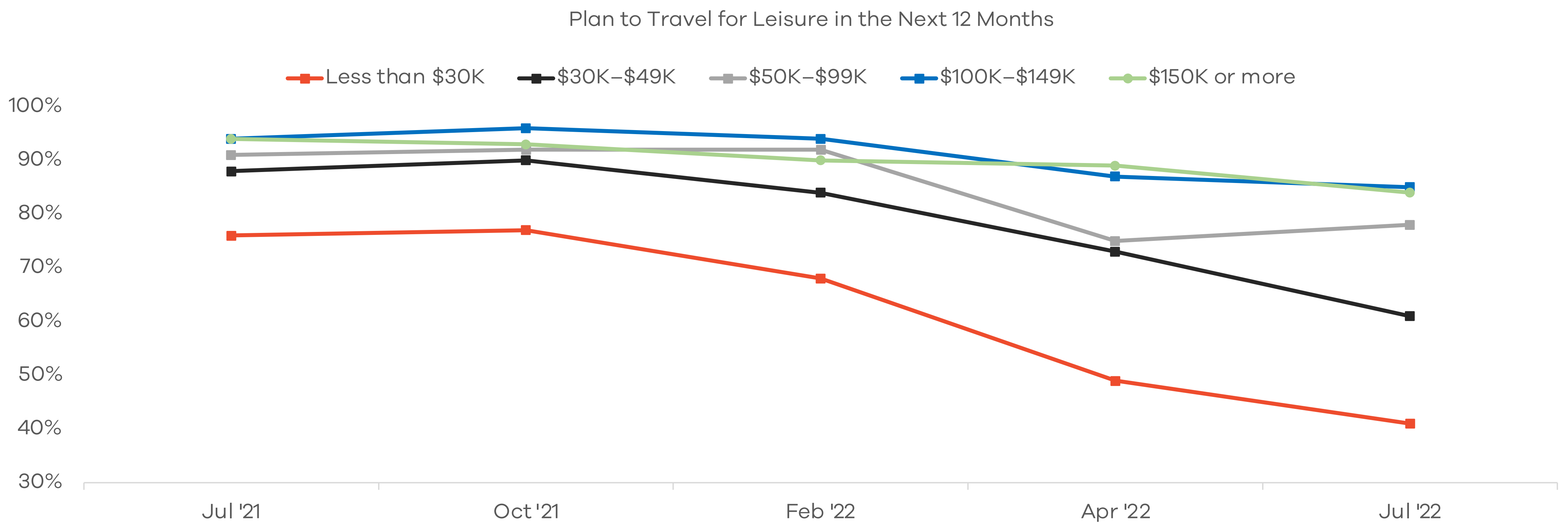
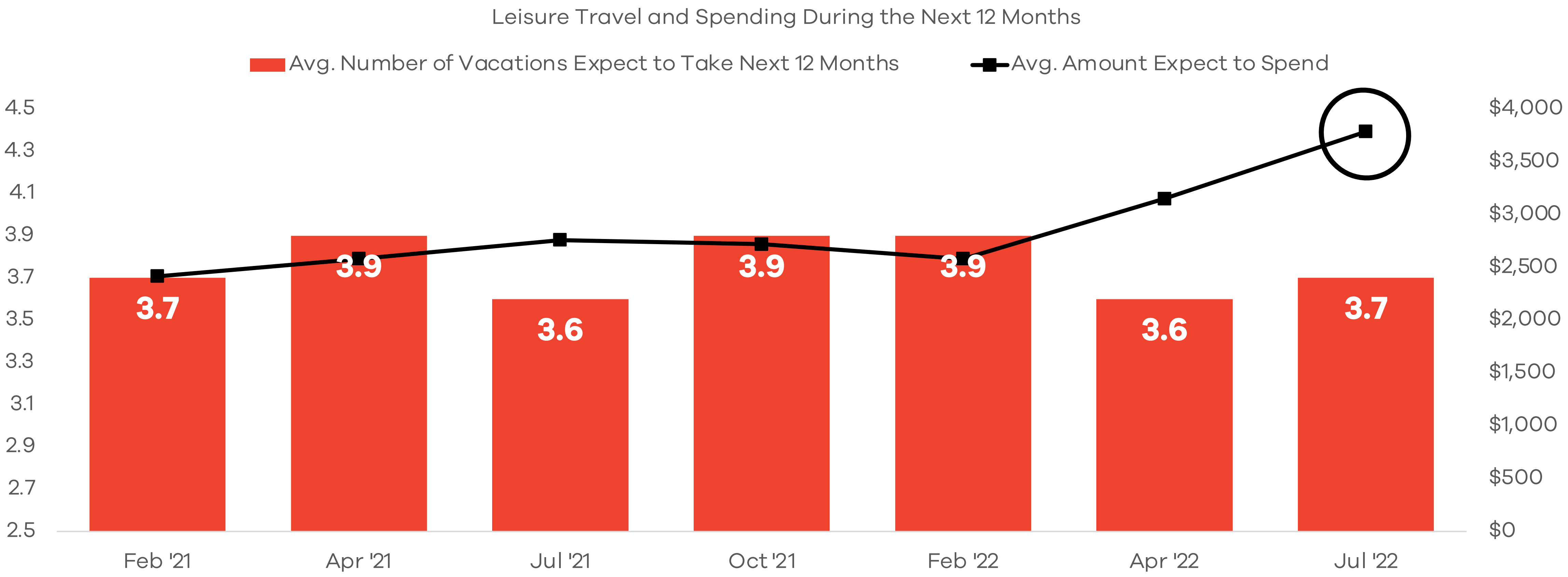
# Lower Income Households Are More Impacted




**Base:** U.S. adults (<$30K: n=729; $30K-$49K: n=629; $50K-$99K: n=1,342; $100K-$149K: n=815; $150K+: n=1,035)
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"

# Among Those Who Do Plan to Travel in the Next 12 Months, Travel Spending Intentions Continue to Increase




**Base:** Active leisure travelers (n=3,290)
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"



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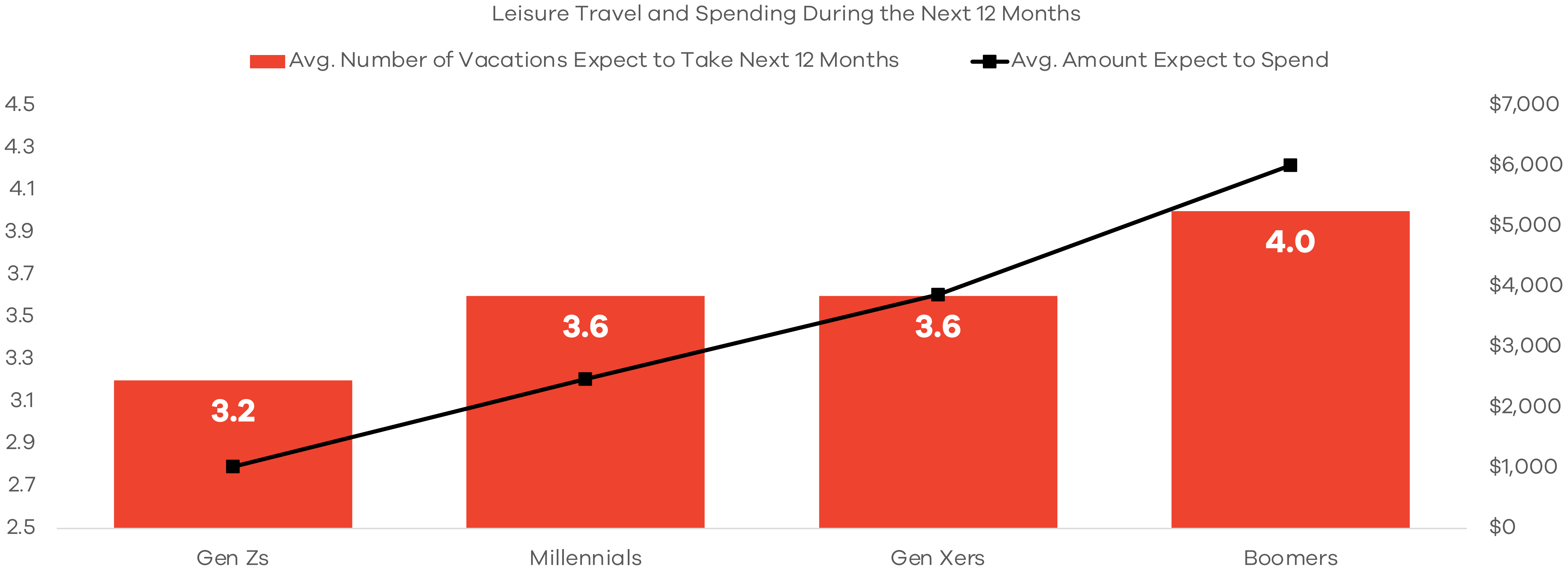
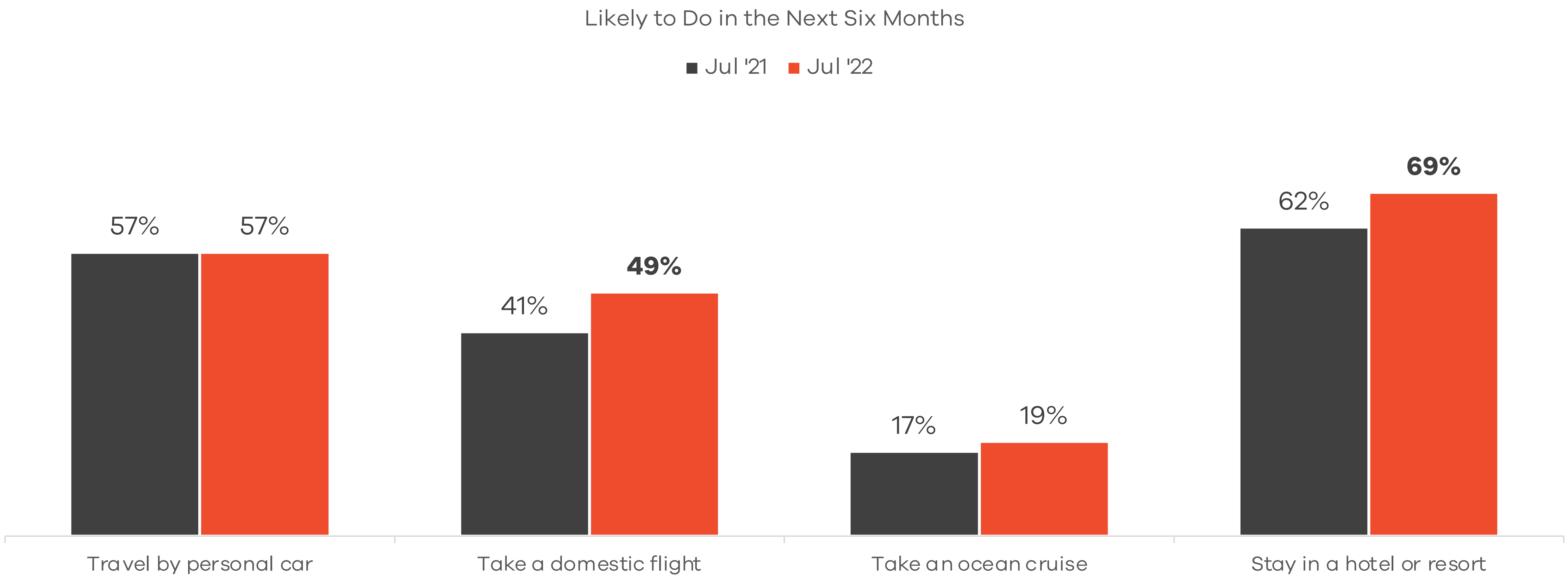
# Boomers Expect to Spend the Most on Leisure Travel During the Next 12 Months




**Base:** Active leisure travelers (Gen Zs: n=402; Millennials: n=999; Gen Xers: n=777; Boomers: n=989)
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"

MMGY Travel Intelligence

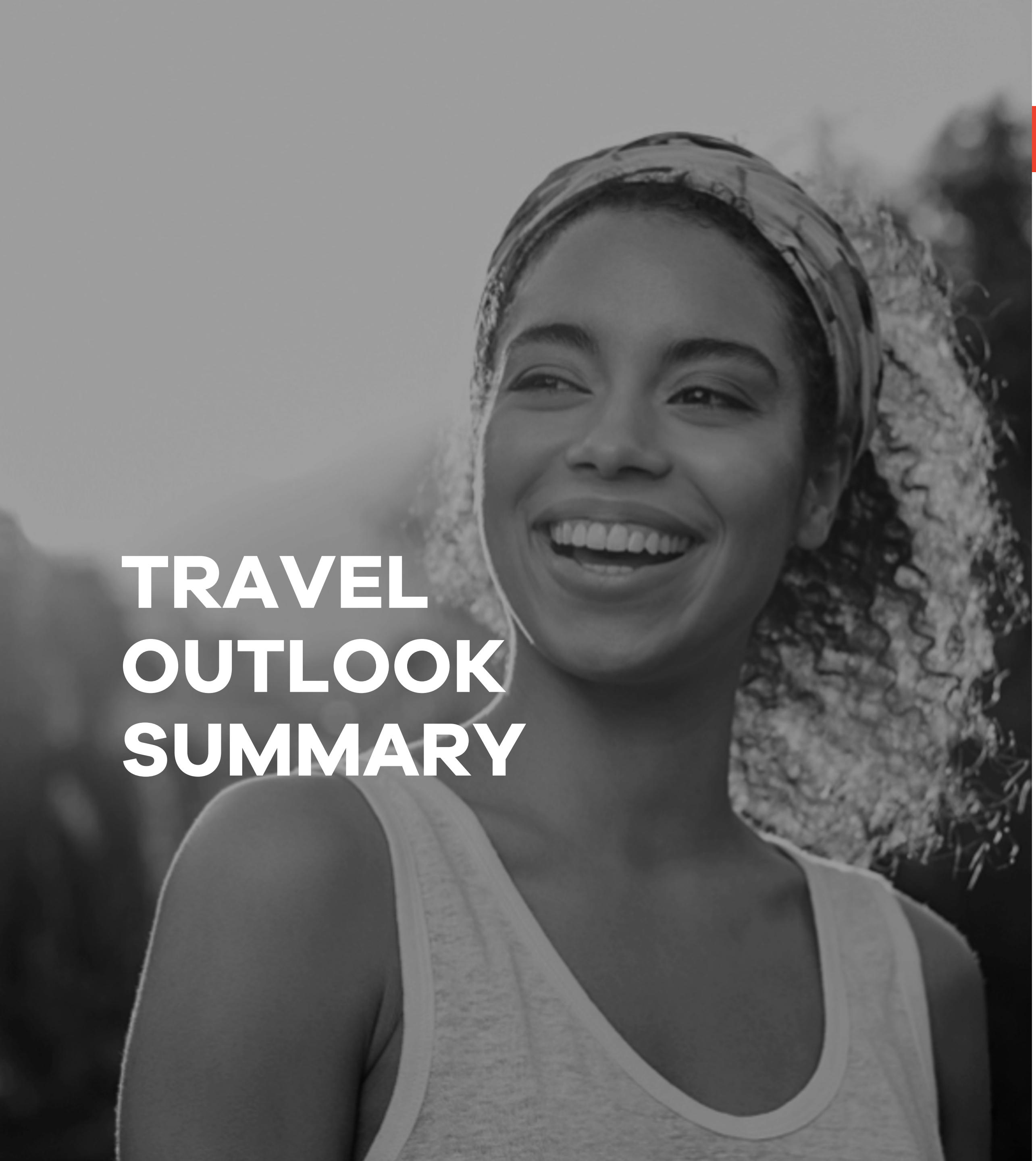
# Likelihood to Take a Flight and Stay in a Hotel or Resort Has Increased From One Year Ago




Data in bold indicates a statistically significant difference from 2021.

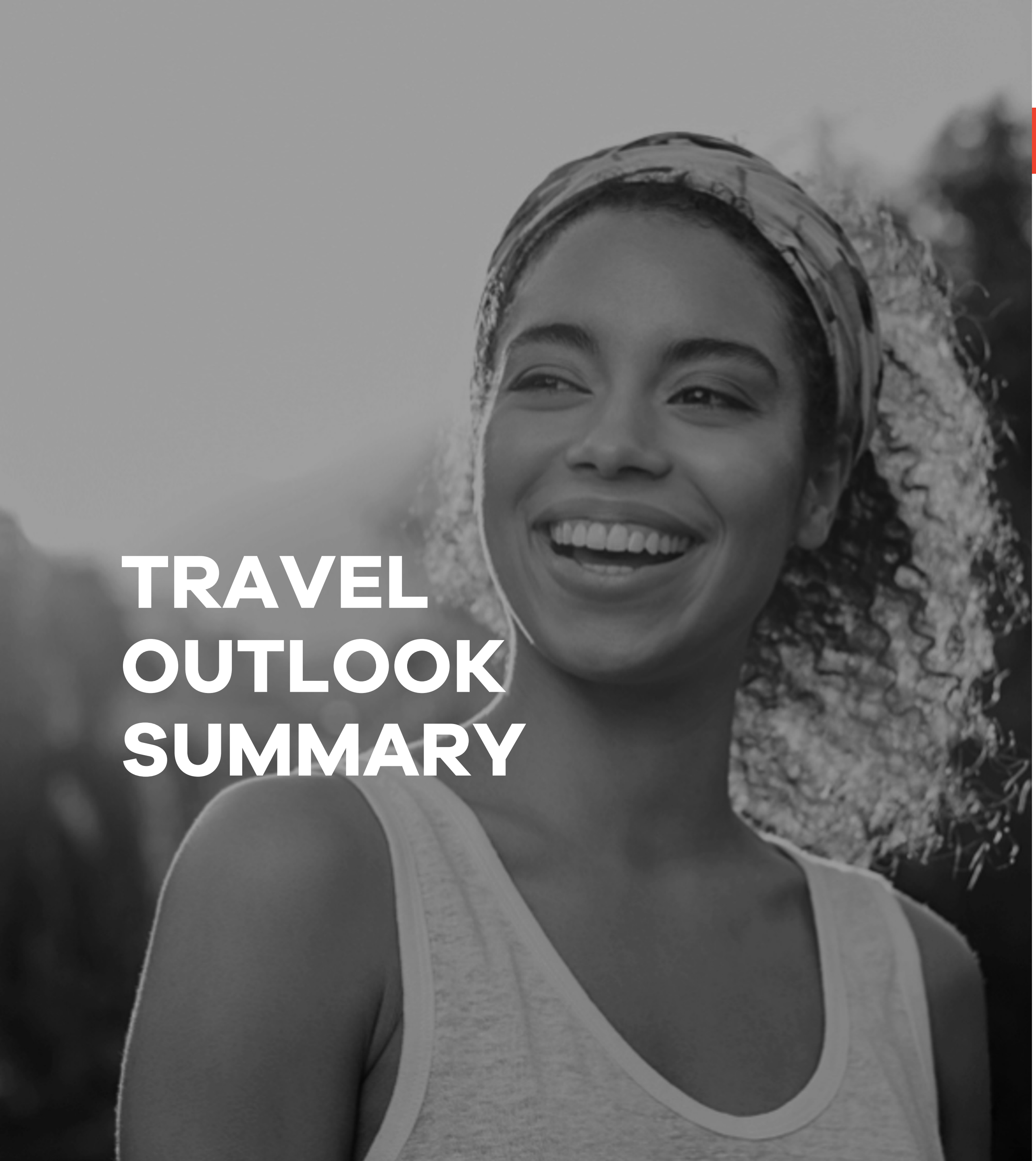
**Base:** U.S. adults who plan to vacation during the next six months (July 2021: n=3,283; July 2022: n=2,865)

**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"




## KEY TAKEAWAY:

- Continuing the trend we saw over the summer, the affordability of travel and personal finances are proving to be an impediment to the travel intentions of U.S. adults. Six in 10 U.S. adults plan to take a vacation in the next six months (63%), which is similar to the percentage planning to do so last quarter (65%) but down significantly from those planning to do so this time last year (73%), a possible hint that the holiday travel season may be a bit slower this year compared to last year. Among those not planning to vacation in the next six months, nearly 4 in 10 aren't doing so because of concerns about their financial situation (37%) and the high cost of travel (35%). Although fewer people intend to travel, those who do plan to take a similar number of trips (3.7 trips) as they reported last year (3.5 trips) and plan to spend more on these trips ($3,785, up from $2,758 in 2021). In large part, this is attributable to Boomers and higher-income households saying they plan to spend more on travel, while lower-income households tell us they expect to spend considerably less on travel in the coming months.



# TRAVEL OUTLOOK SUMMARY

## WHAT IT MEANS:

- Inflation and rising travel costs are bifurcating travel intentions with higher-income households saying they will continue to travel and lower-income households increasingly opting to stay home. As such, we're predicting that overall travel volume will likely decrease somewhat in 2023 while prices will increase. From a hospitality perspective, that means occupancy will decrease while average ADR is likely to increase modestly. As a result, we're predicting a slight increase in RevPAR on a year-over-year basis in 2023.

# Where People Want to Visit

# States Interested in Visiting During the Next Two Years

| Rank | Destination | % Interested |
|---|---|---|
| 1 | Hawaii | 63% |
| 2 | Florida | 62% |
| 3 | California | 56% |
| 4 | New York | 52% |
| 5 | Colorado | 51% |
| 6 | Alaska | 48% |
| 7 | Nevada | 45% |
| 8 | Texas | 44% |
| 9 | North Carolina | 42% |
| 10 | Arizona | 41% ▼ |
| 11 | Tennessee | 40% |
| 12 | Georgia | 38% |
| 12 | Maine | 38% |
| 14 | Washington | 37% |
| 14 | South Carolina | 37% ▼ |
| 16 | Louisiana | 35% |
| 16 | Massachusetts | 35% |
| 18 | Virginia | 33% ▼ |
| 19 | Utah | 32% |
| 19 | Montana | 32% |
| 19 | Oregon | 32% |
| 19 | New Mexico | 32% |
| 19 | Pennsylvania | 32% ▼ |
| 19 | Vermont | 32% |
| 25 | Wyoming | 31% |
| 26 | Rhode Island | 30% |
| 27 | New Jersey | 29% |
| 27 | Maryland | 29% ▼ |
| 27 | Wisconsin | 29% |
| 27 | Michigan | 29% ▼ |
| 31 | New Hampshire | 28% |
| 32 | Alabama | 27% |
| 33 | Connecticut | 26% ▼ |
| 33 | Kentucky | 26% |
| 33 | West Virginia | 26% ▼ |
| 33 | Illinois | 26% |
| 33 | South Dakota | 26% ▼ |
| 38 | North Dakota | 25% ▼ |
| 38 | Ohio | 25% ▼ |
| 40 | Mississippi | 24% ▼ |
| 40 | Idaho | 24% |
| 42 | Minnesota | 23% ▼ |
| 42 | Missouri | 23% ▼ |
| 42 | Oklahoma | 23% ▼ |
| 45 | Delaware | 22% |
| 45 | Indiana | 22% ▼ |
| 47 | Arkansas | 21% |
| 47 | Nebraska | 21% ▼ |
| 49 | Kansas | 19% ▼ |
| 50 | Iowa | 18% ▼ |

▲ Displayed a statistically significant increase compared to fall 2022

▼ Displayed a statistically significant decrease compared to fall 2022

**Base:** Active leisure travelers (n=3,290)
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"

# Destinations Interested in Visiting During the Next Two Years

| Rank | Destination | % Interested |
|---|---|---|
| 1 | Island of Hawai'i | 57% |
| 1 | Maui, HI | 57% |
| 3 | Honolulu, HI | 56% |
| 4 | Florida Keys/Key West, FL | 54% |
| 4 | Las Vegas, NV | 54% |
| 6 | Kaua'i, HI | 53% |
| 7 | Orlando, FL | 51% |
| 8 | New York City, NY | 50% |
| 9 | Miami, FL | 46% |
| 9 | San Diego, CA | 46% |
| 11 | New Orleans, LA | 45% |
| 11 | San Francisco, CA | 45% |
| 11 | Tampa, FL | 45% |
| 14 | Los Angeles, CA | 44% |
| 14 | Nashville, TN | 44% |
| 16 | Denver, CO | 43% |
| 16 | Niagara Falls, NY | 43% |
| 16 | Palm Beach, FL | 43% |
| 19 | Myrtle Beach, SC | 42% |
| 19 | St. Petersburg/Clearwater, FL | 42% |
| 21 | Boston, MA | 41% |
| 21 | Fort Lauderdale, FL | 41% |

| Rank | Destination | % Interested |
|---|---|---|
| 21 | Napa Valley, CA | 41% |
| 21 | Washington, D.C. | 41% |
| 25 | Daytona Beach, FL | 40% |
| 25 | Hilton Head Island, SC | 40% |
| 25 | Panama City Beach, FL | 40% |
| 28 | Ft. Myers/Sanibel/Captiva, FL | 39% ▼ |
| 28 | Savannah, GA | 39% |
| 30 | Charleston, SC | 38% |
| 30 | St. Augustine, FL | 38% |
| 32 | Palm Springs, CA | 37% |
| 32 | Phoenix/Scottsdale, AZ | 37% |
| 34 | Outer Banks, NC | 36% ▼ |
| 34 | San Antonio, TX | 36% ▼ |
| 36 | Austin, TX | 35% ▼ |
| 36 | Chicago, IL | 35% |
| 36 | Dallas, TX | 35% ▼ |
| 36 | Seattle, WA | 35% ▼ |
| 36 | Sonoma County, CA | 35% |
| 41 | Anaheim, CA | 34% ▼ |
| 41 | Asheville, NC | 34% |
| 41 | Gatlinburg/Pigeon Forge, TN | 34% ▼ |
| 41 | Virginia Beach, VA | 34% |

| Rank | Destination | % Interested |
|---|---|---|
| 45 | Atlanta, GA | 33% ▼ |
| 45 | Charlotte, NC | 33% ▼ |
| 45 | Houston, TX | 33% ▼ |
| 45 | Philadelphia, PA | 33% |
| 49 | Portland, OR | 32% ▼ |
| 50 | Salt Lake City, UT | 31% |
| 50 | Tucson, AZ | 31% ▼ |
| 52 | Raleigh/Durham, NC | 30% |
| 53 | Vail, CO | 29% ▼ |
| 54 | Wilmington, NC | 28% |
| 55 | St. Louis, MO | 27% |
| 56 | Branson, MO | 26% ▼ |
| 56 | Corpus Christi, TX | 26% ▼ |
| 56 | Winston-Salem, NC | 26% |
| 59 | Kansas City, MO | 25% ▼ |
| 60 | Ann Arbor, MI | 24% ▼ |
| 60 | Cleveland, OH | 24% |
| 60 | Detroit, MI | 24% |
| 60 | Minneapolis, MN | 24% |

**Base:** Active leisure travelers (n=3,290)
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"

# Top 10 Destinations of Interest by Generation

Destinations shaded in black occur in the top 10 for all generations.

| Gen Zs | | Millennials | | Gen Xers | | Boomers | |
|---|---|---|---|---|---|---|---|
| 1 | New York City, NY | 1 | Maui, HI | 1 | Island of Hawai'i | 1 | Maui, HI |
| 2 | Los Angeles, CA | 1 | Honolulu, HI | 2 | Florida Keys/Key West, FL | 2 | Honolulu, HI |
| 3 | Orlando, FL | 3 | Orlando, FL | 3 | Maui, HI | 3 | Island of Hawai'i |
| 4 | Las Vegas, NV | 3 | Island of Hawai'i | 3 | Honolulu, HI | 4 | Kaua'i, HI |
| 5 | Miami, FL | 5 | Las Vegas, NV | 5 | Kaua'i, HI | 5 | Florida Keys/Key West, FL |
| 6 | San Francisco, CA | 6 | Miami, FL | 6 | Las Vegas, NV | 6 | Las Vegas, NV |
| 7 | Niagara Falls, NY | 7 | Los Angeles, CA | 7 | New York City, NY | 7 | Myrtle Beach, SC |
| 8 | Island of Hawai'i | 8 | New York City, NY | 8 | Orlando, FL | 7 | Charleston, SC |
| 9 | Maui, HI | 8 | Florida Keys/Key West, FL | 8 | San Diego, CA | 9 | Nashville, TN |
| 10 | Honolulu, HI | 10 | Kaua'i, HI | 10 | New Orleans, LA | 10 | Orlando, FL |
| 10 | New Orleans, LA | | | 10 | Palm Beach, FL | 10 | St. Petersburg/Clearwater, FL |
| | | | | | | 10 | Savannah, GA |

**Base:** Active leisure travelers (Gen Zs: n=402; Millennials: n=999; Gen Xers: n=777; Boomers: n=989)
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"

# Culinary Travel

*Fall Module*

MMGY Travel Intelligence

# A Look at the Culinary Traveler

An active leisure traveler who is extremely influenced (top box) by perceptions of the quality of the culinary scene when choosing where to stay in a destination.

**16%** of all active leisure travelers

**4.3** Average number of leisure trips in next 12 months

**$3,161** Average spend on leisure travel in next 12 months

**Top Motivations to Travel:**

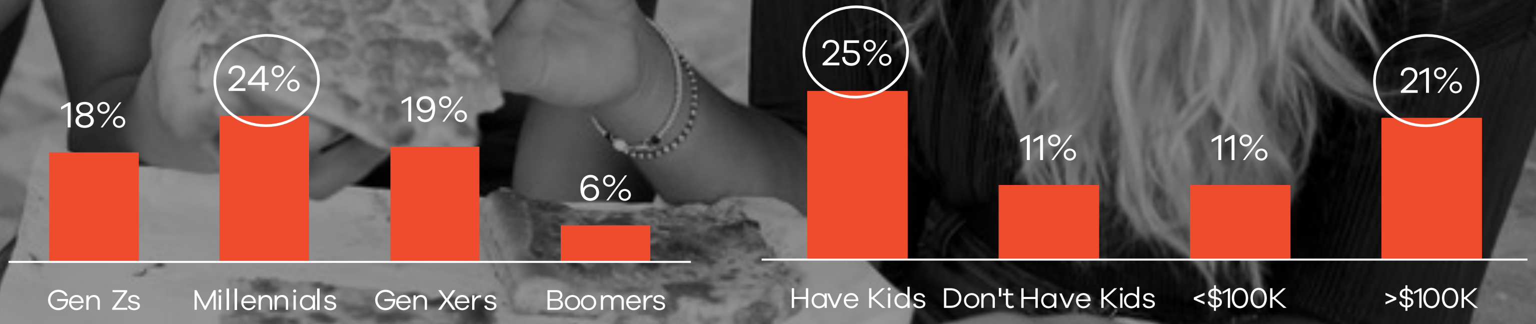
- The desire to get away and unplug (93%)
- Experiencing new cuisines (90%)
- To spend time with my spouse/significant other and/or children (89%)

/ Influence is highest among Millennials, travelers with children and travelers with household incomes of $100K or more.

**Top Cities of Interest:**

- The Florida Keys/Key West (73%)
- Honolulu (71%)
- Miami (71%)
- New York City (71%)
- San Francisco (70%)

% Who Are Extremely Influenced by the Culinary Scene




MMGY Travel Intelligence

# The Influence of the Culinary Scene in a Destination Is Unchanged From Last Year.

MMGY Travel Intelligence

**49%** 2021 **50%** 2022

of active leisure travelers are influenced by their perceptions of the quality of the culinary scene when choosing where to stay within a destination. (Top 2 Box)

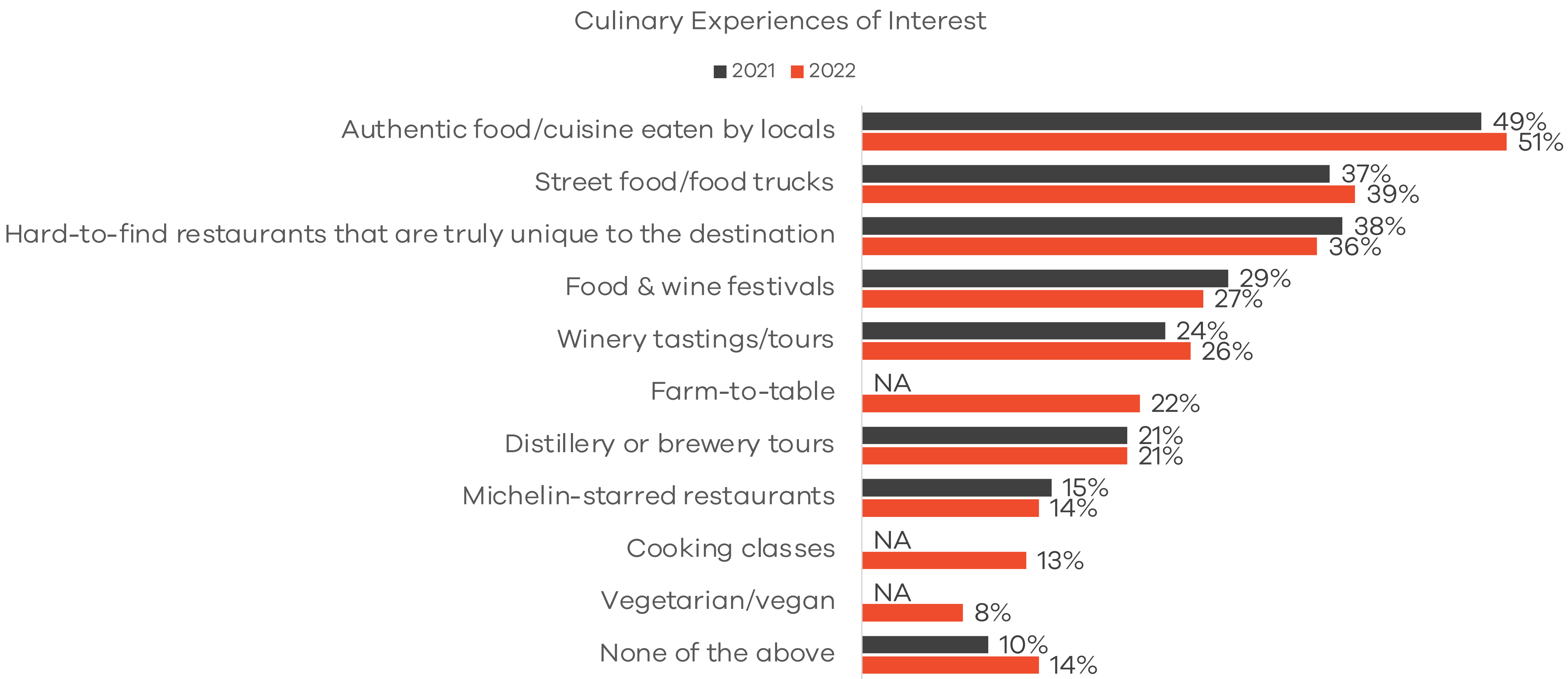
/ More younger travelers, travelers with higher incomes and travelers with kids are influenced by the perception of the quality of the culinary scene when choosing where to stay within a destination.

**Gen Zs: 56%**
**Millennials: 61%**
Gen Xers: 52%
Boomers: 39%

Have Kids: **62%**
Don't Have Kids: 44%

Less than $100K: 44%
More than $100K: **57%**

# Authentic cuisine eaten by locals is the top culinary experience of interest, followed by street food/food trucks and restaurants unique to the destination.




NA - Option was not asked in 2021.

**Base:** Active leisure travelers (n=3,290)

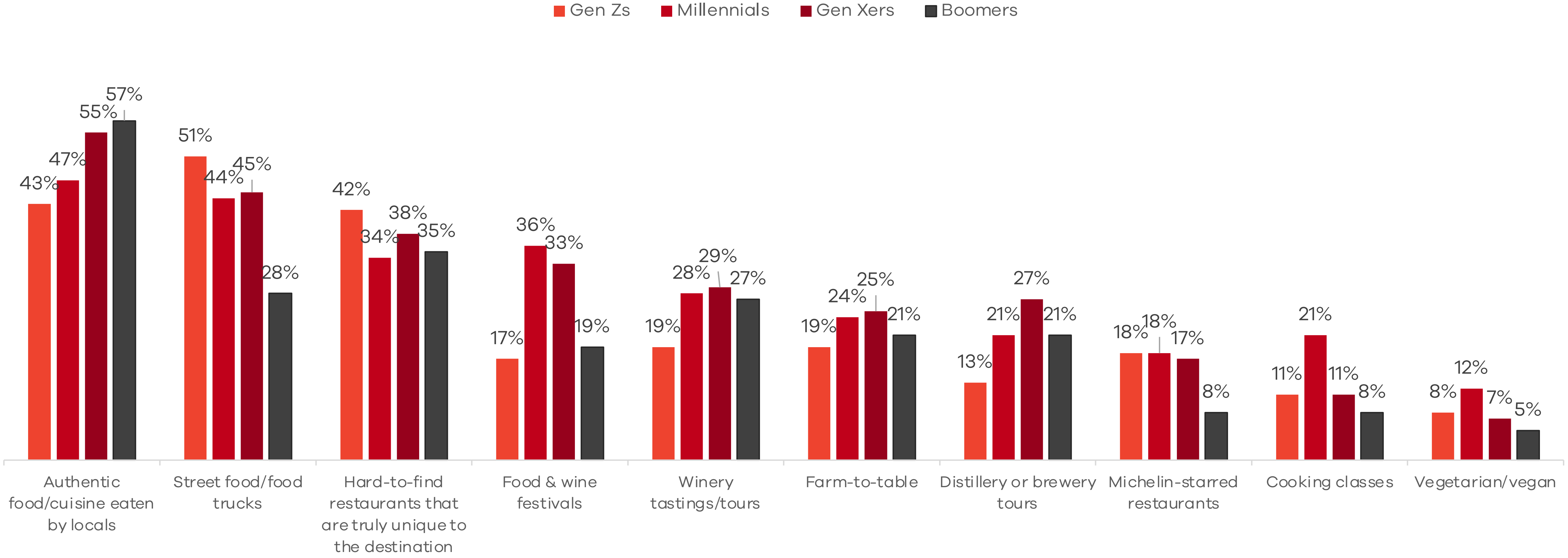
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"



MMGY Travel Intelligence

# Culinary Experiences of Interest by Generation

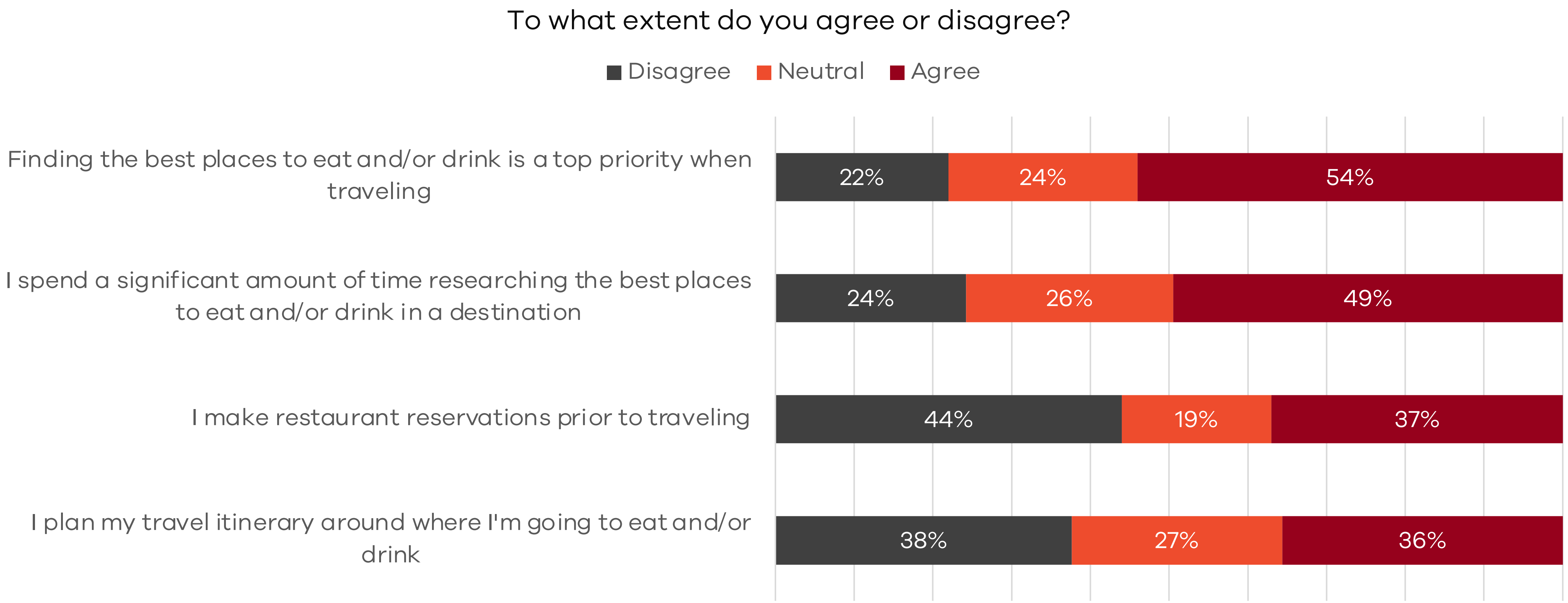
/ Older generations are more likely to look for authentic food eaten by locals while younger generations are also interested in street food/food trucks and hard-to-find restaurants that are truly unique to the destination.




**Base:** Active leisure travelers (Gen Zs: n=402; Millennials: n=999; Gen Xers: n=777; Boomers: n=989)

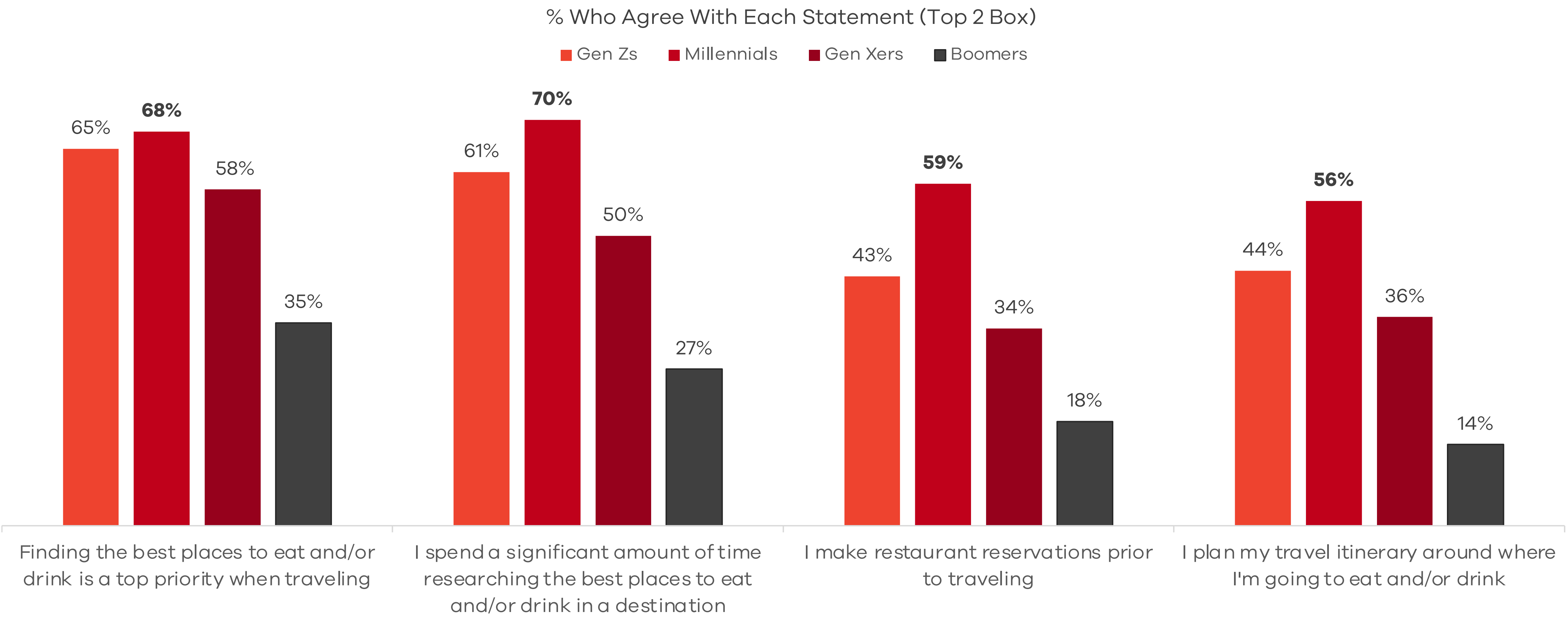
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"

# Half of active leisure travelers agree that finding the best places to eat and drink is a top priority when traveling and that they spend a significant amount of time researching these options in a destination.




**Base:** Active leisure travelers (n=3,290)
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"

# Culinary experiences are a top priority for Millennial travelers while on vacation.




**Base:** Active leisure travelers (Gen Zs: n=402; Millennials: n=999; Gen Xers: n=777; Boomers: n=989)
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"

# CULINARY TRAVEL SUMMARY

## KEY TAKEAWAY:

- Younger travelers consider culinary experiences to be a high priority when traveling. Six in 10 Gen Zs (56%) and Millennials (61%) are influenced by the quality of the culinary scene when choosing where to stay in a destination. These travelers indicate that finding the best places to eat and drink are a top priority when traveling (Gen Zs: 65%; Millennials: 68%) and that they spend a significant amount of time researching these places (Gen Zs: 61%; Millennials: 70%) as part of their travel planning efforts. These travelers are looking for authentic cuisines favored by locals (Gen Zs: 43%; Millennials: 47%) and street food/food trucks (Gen Zs: 51%; Millennials: 44%).

# CULINARY TRAVEL SUMMARY

## WHAT IT MEANS:

- Culinary experiences continue to be an important aspect of travel – especially for younger generations – so much so that many of these travelers are planning their entire itinerary around where they want to eat and drink. Interestingly, regardless of how affluent travelers are, they generally value authentic, local food and beverage experiences much more so than traditional luxury dining experiences, such as those designated by Michelin star ratings. This insight is important for destination marketers to communicate with prospective visitors in relevant ways. Culinary experiences are ultimately very important in how a destination can differentiate its brand in an increasingly crowded travel marketplace.

# Holiday Travel

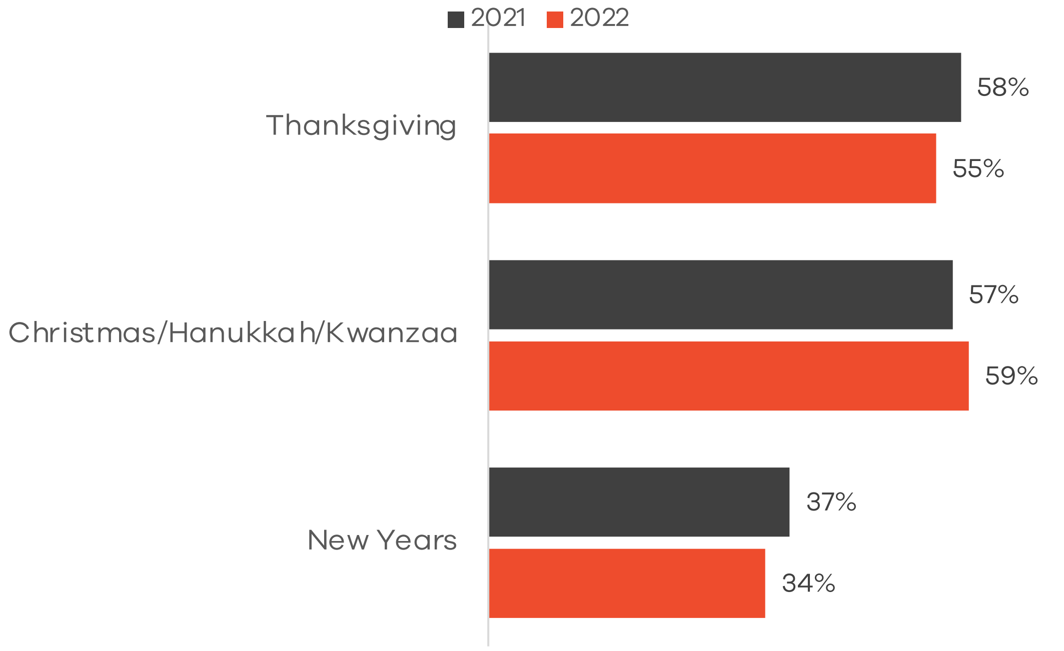
*Fall Module*

# Compared to Last Year, Fewer U.S. Adults Are Planning to Travel for the Winter Holidays.

**42%** 2021 **36%** 2022 ▼

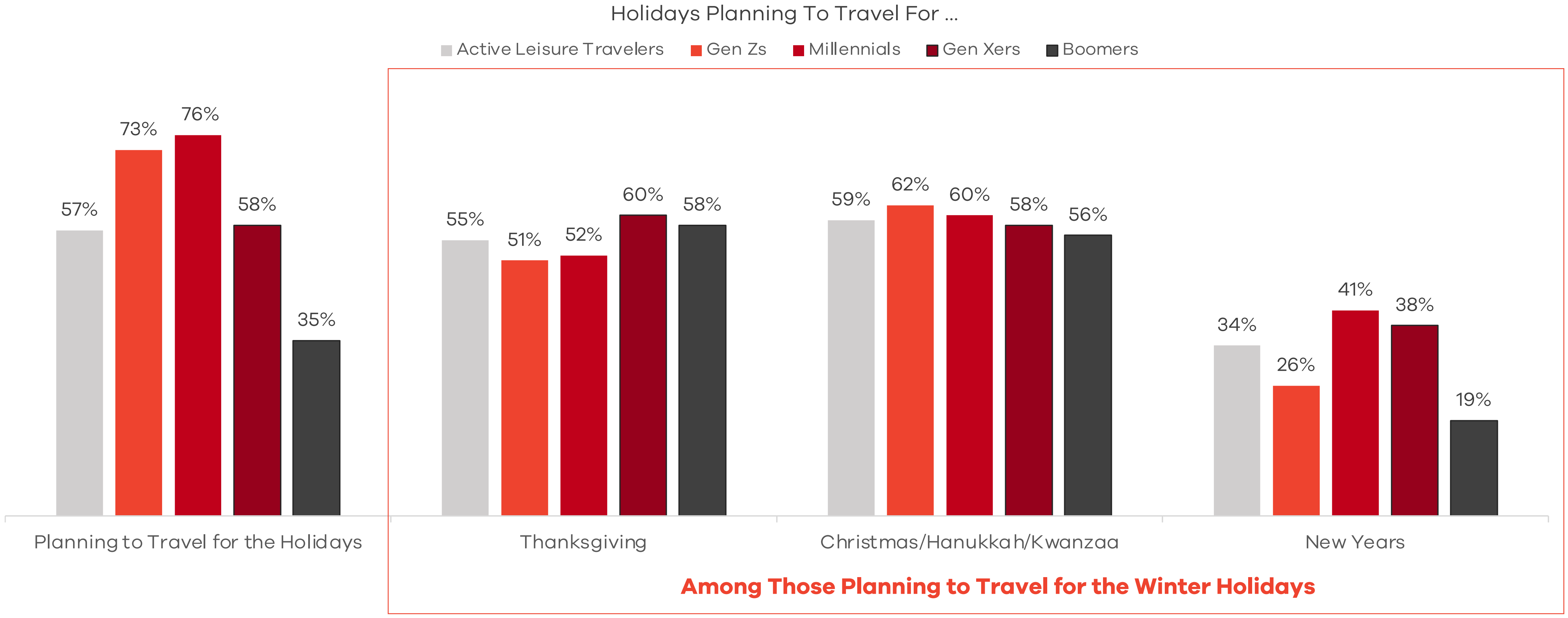
of U.S. adults are planning to travel for the winter holidays.

% Planning to Travel For ...
(Among those planning to travel for the winter holidays)



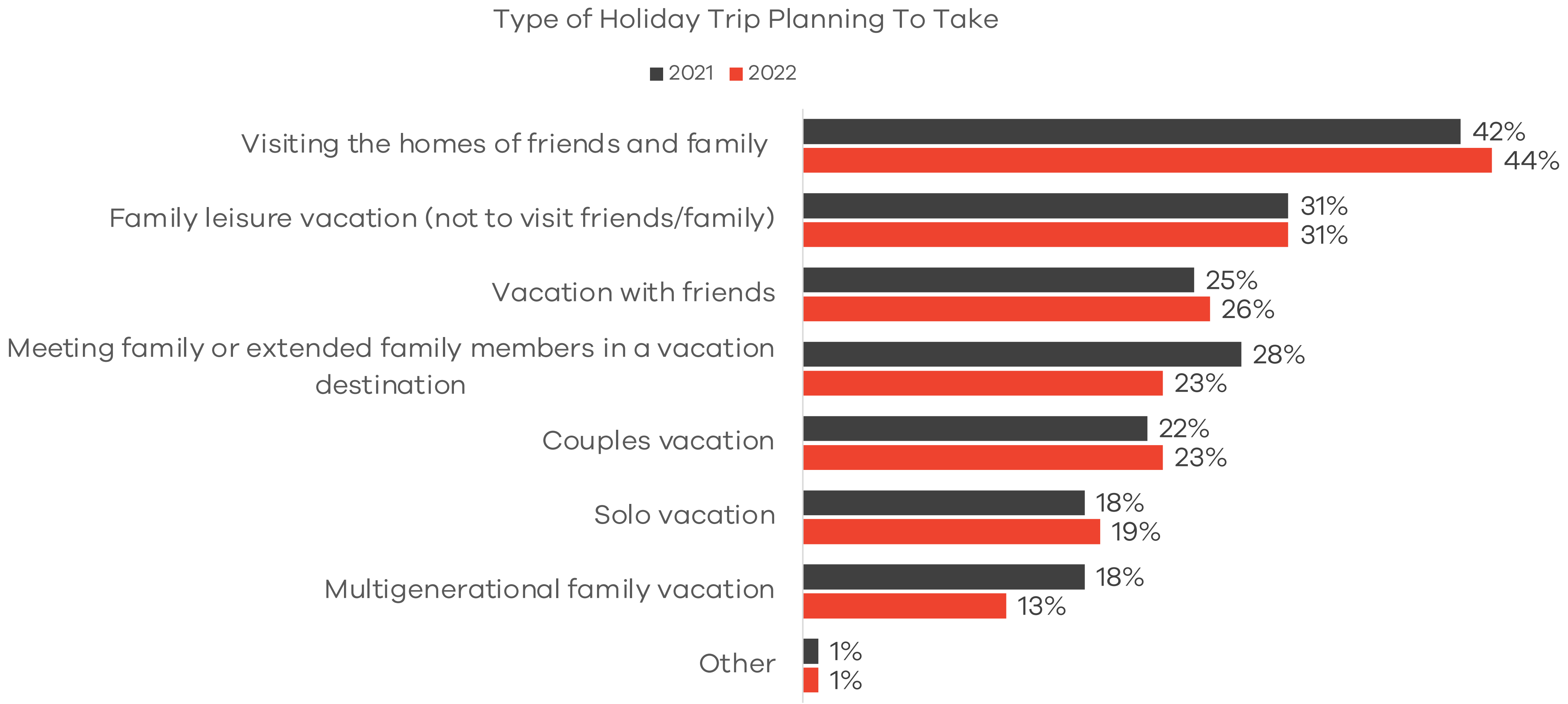

**Base:** U.S. adults (n=4,551), those planning to travel for the winter holidays (n=1,628)
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"

# Younger generations are more likely to travel for the holidays.




**Base:** Those planning to travel for the winter holidays (Active leisure travelers: n=1,628; Gen Zs: n=233; Millennials: n=631; Gen Xers: n=407; Boomers: n=304)
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"

# The most popular type of holiday trip these travelers are planning to take is visiting the homes of friends and family, followed by a family leisure vacation.



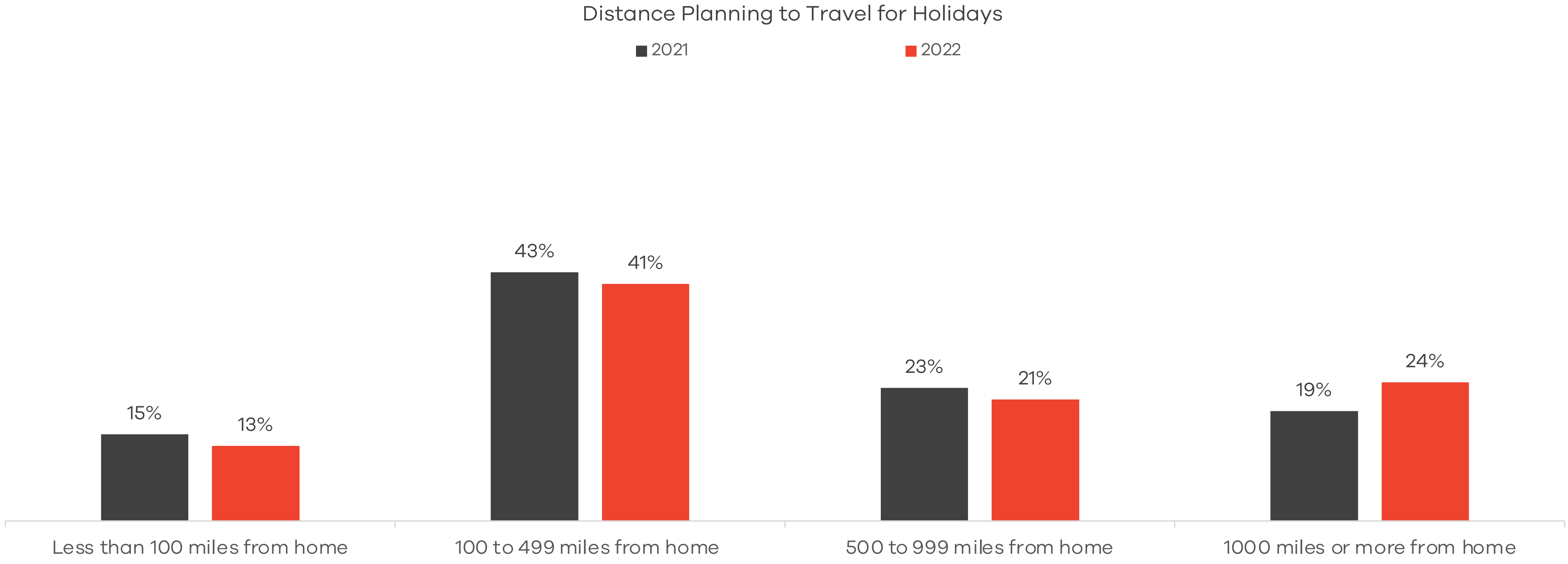

**Base:** Active leisure travelers who are planning to travel for the holidays (n=1,628)

**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"



MMGY Travel Intelligence

# More than half of these travelers are planning to travel less than 500 miles from home for their winter holiday trip.



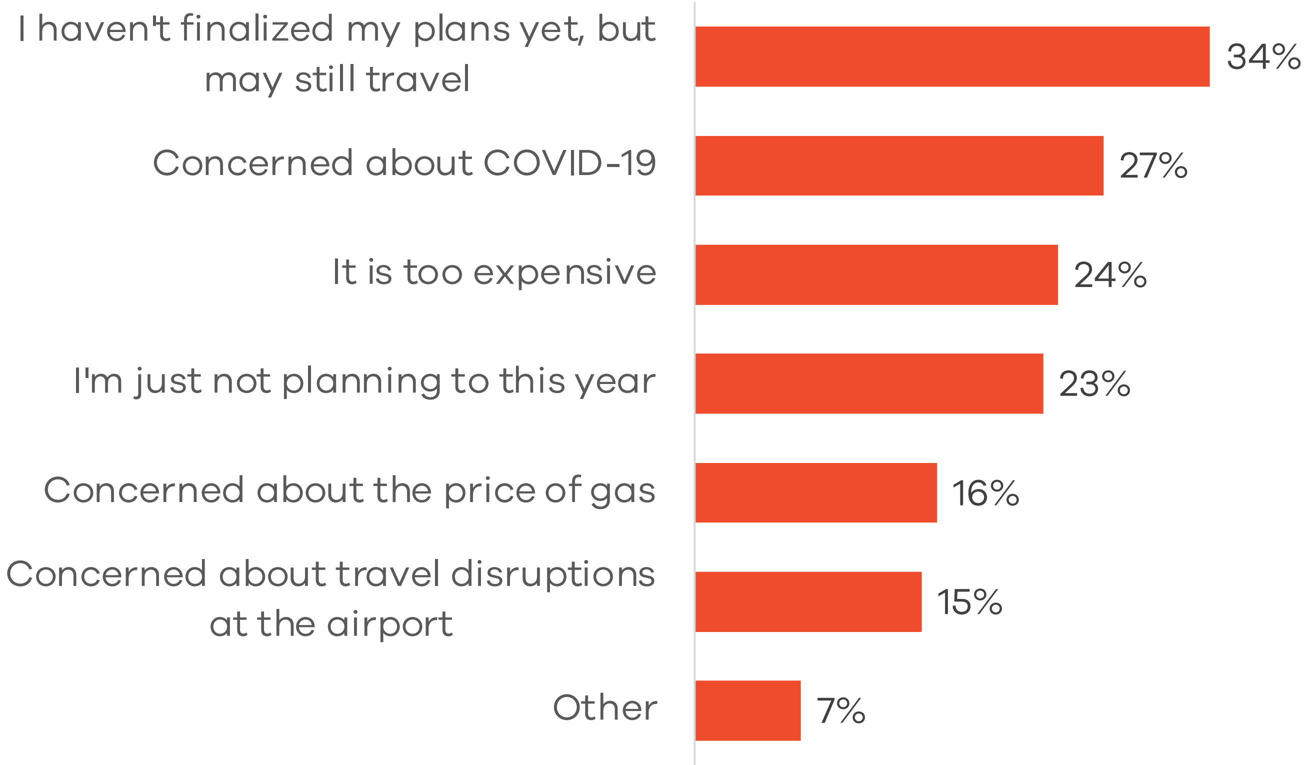

**Base:** Active leisure travelers who are planning to travel for the holidays (n=1,628)
**Source:** MMGY Global's 2022 *Portrait of American Travelers®* "Fall Edition"

# Among those who said they're not planning to travel for the winter holidays, only 10% typically travel for the winter holidays. One-third of these travelers indicate they just haven't finalized their winter travel plans yet.

**10%**

of those who are not planning to travel for the winter holidays indicate that they typically travel for the winter holidays.

**Why Aren't You Planning to Take an Overnight Trip for the Winter Holidays This Year?***




* Small sample size – interpret with caution

**Base:** Active leisure travelers who are not planning to travel for the holidays (n=1,236); those who typically travel for winter holidays (n=123)

**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"

# HOLIDAY TRAVEL SUMMARY

## KEY TAKEAWAY:

- Fewer U.S. adults are planning to travel for the winter holidays compared to last year, down from 42% in 2021 to 36% this year – a statistically significant decline. Among those who are planning to travel, most are planning to travel for Thanksgiving (55%) and Christmas/Hanukkah/Kwanzaa (59%). Not surprisingly, they are planning to visit the homes of friends and family (44%) or take a leisure vacation with family (31%) or friends (26%). Younger generations are more likely to travel for these holidays than older generations (Gen Zs: 73% and Millennials: 76% vs. Gen Xers: 58% and Boomers: 35%), which may say more about who is planning to host these family get-togethers than anything else. Among those who are not planning to travel for the winter holidays, only 10% indicate they typically travel for the winter holidays. Among these travelers, one-third indicate they just haven't finalized their plans yet and may still travel (34%), and one-quarter are concerned about COVID-19 (27%), indicate that travel is too expensive (24%), or are just not planning to travel (23%).

# HOLIDAY TRAVEL SUMMARY

## WHAT IT MEANS:

- Based on the data, we still expect this to be a very healthy holiday travel season for the industry but potentially down slightly from a volume perspective compared to 2021/2022. Again, it appears the rising cost of travel and the potential for travel disruptions and cancellations will disproportionately impact the travel intentions of younger travelers.

# Social Media Habits

Fall Module

MMGY Travel Intelligence

# The Majority of Active Leisure Travelers Have a Page or Profile on Social Media With Nearly All Gen Z and Millennial Travelers Doing So.

MMGY Travel Intelligence

**84%** 2021 **83%** 2022

of active leisure travelers have a personal page or profile on social media.

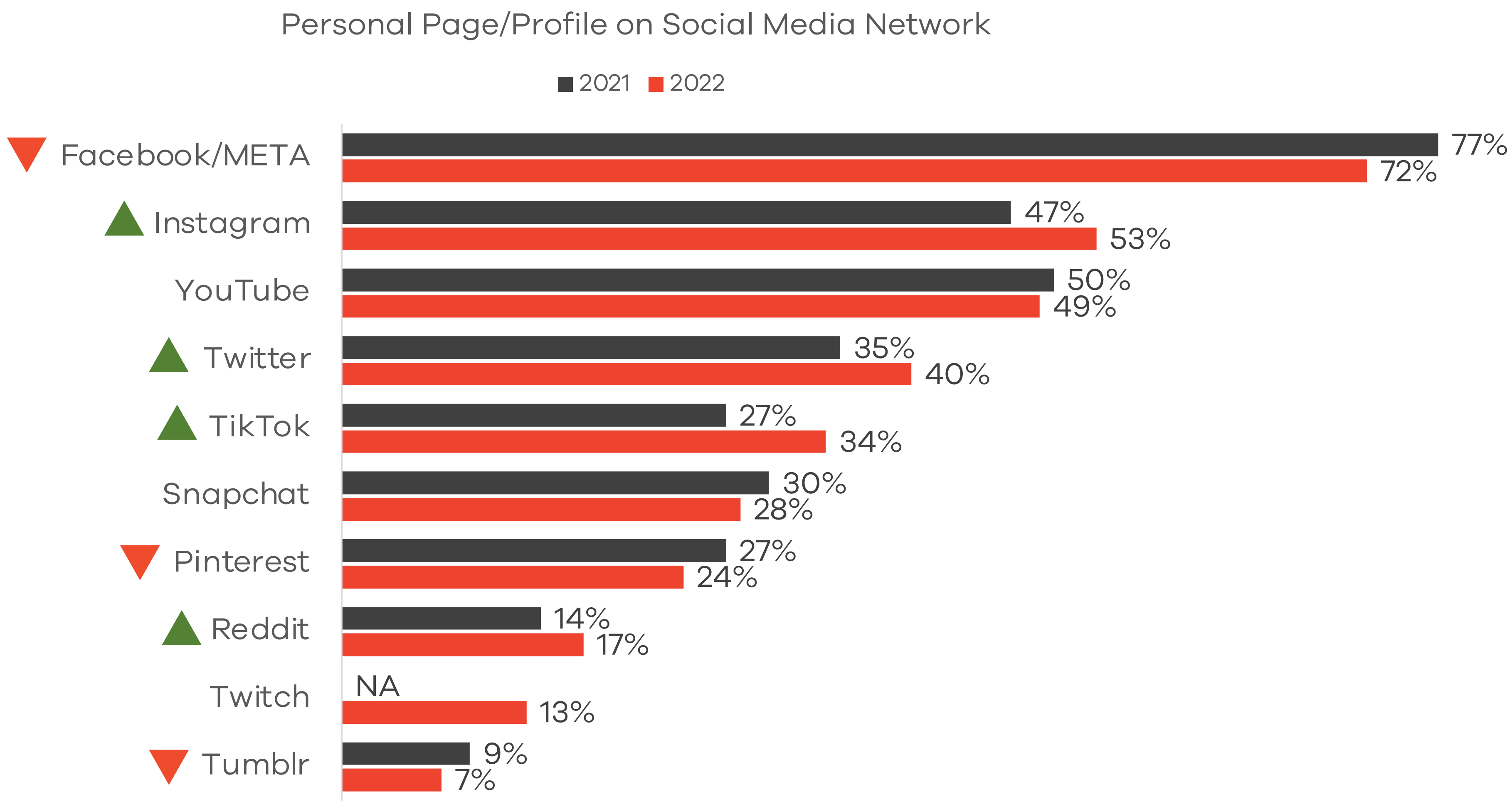
/ While many travelers are active on social media, more younger travelers, travelers with lower incomes and travelers with kids have a personal page or profile on social media.

**Gen Zs: 100%**
**Millennials: 97%**
Gen Xers: 86%
Boomers: 64%

Have Kids: **97%**
Don't Have Kids: 75%

Less than $100K: **87%**
More than $100K: 78%

# Facebook is the most popular social media network among active leisure travelers, followed by Instagram and YouTube.




**Base:** Active leisure travelers who have a page/profile on social media (n=2,721)

**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"

# Most Popular Social Media Networks by Generation

/ Facebook's popularity can be seen among Boomers, Gen Xers and Millennials, but all other social media networks are more popular among Gen Zs and Millennials.

| Personal Page/Profile on Social Media Network | Gen Zs | Millennials | Gen Xers | Boomers |
|---|---|---|---|---|
| Facebook/META | 35% | **70%** | **78%** | **88%** |
| Instagram | **68%** | **64%** | **58%** | 27% |
| YouTube | **58%** | **69%** | **51%** | 19% |
| Twitter | **48%** | **51%** | **43%** | 20% |
| TikTok | **59%** | **50%** | 29% | 6% |
| Snapchat | **46%** | **39%** | 29% | 6% |
| Pinterest | **37%** | 25% | 28% | 13% |
| Reddit | **25%** | **24%** | 17% | 2% |
| Twitch | **28%** | **21%** | 9% | 0% |
| Tumblr | **16%** | 10% | 6% | 1% |

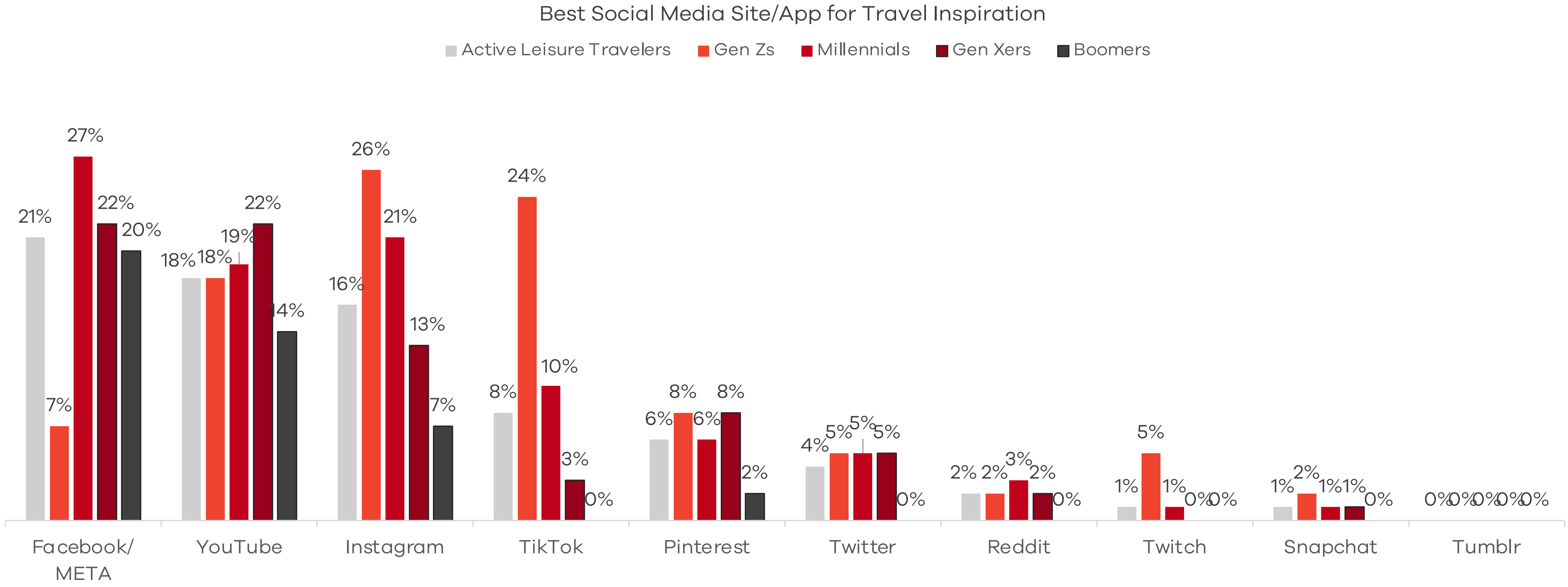
**Base:** Active leisure travelers who have a page/profile on social media (Gen Zs: n=370; Millennials: n=926; Gen Xers: n=709; Boomers: n=638)

**Source:** MMGY Global's 2022 *Portrait of American Travelers®* "Fall Edition"



MMGY Travel Intelligence

# Millennials are most likely to turn to Facebook for travel inspiration while Gen Zs are most likely to turn to Instagram and TikTok.




**Base:** Those who have a personal page/profile on social media (Active leisure travelers: n=2,721; Gen Zs: n=370; Millennials: n=926; Gen Xers: n=709; Boomers: n=638)
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"

MMGY Travel Intelligence

52% 2021 47% 2022

of active leisure travelers have selected a vacation destination or travel service provider based at least partially on information, photos or videos viewed on social media.

/ More younger travelers and travelers with kids have selected a vacation destination or travel service provider based at least partially on information viewed on social media.

**Gen Zs: 60%**
**Millennials: 61%**
Gen Xers: 47%
Boomers: 23%

Have Kids: **65%**
Don't Have Kids: 35%

Less than $100K: 47%
More than $100K: 48%


**Base:** Active leisure travelers who have a page/profile on social media (n=2,721)
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"

# Vacation Destinations on Social Media

39% 2021 35% 2022

of active leisure travelers follow a vacation destination on social media.

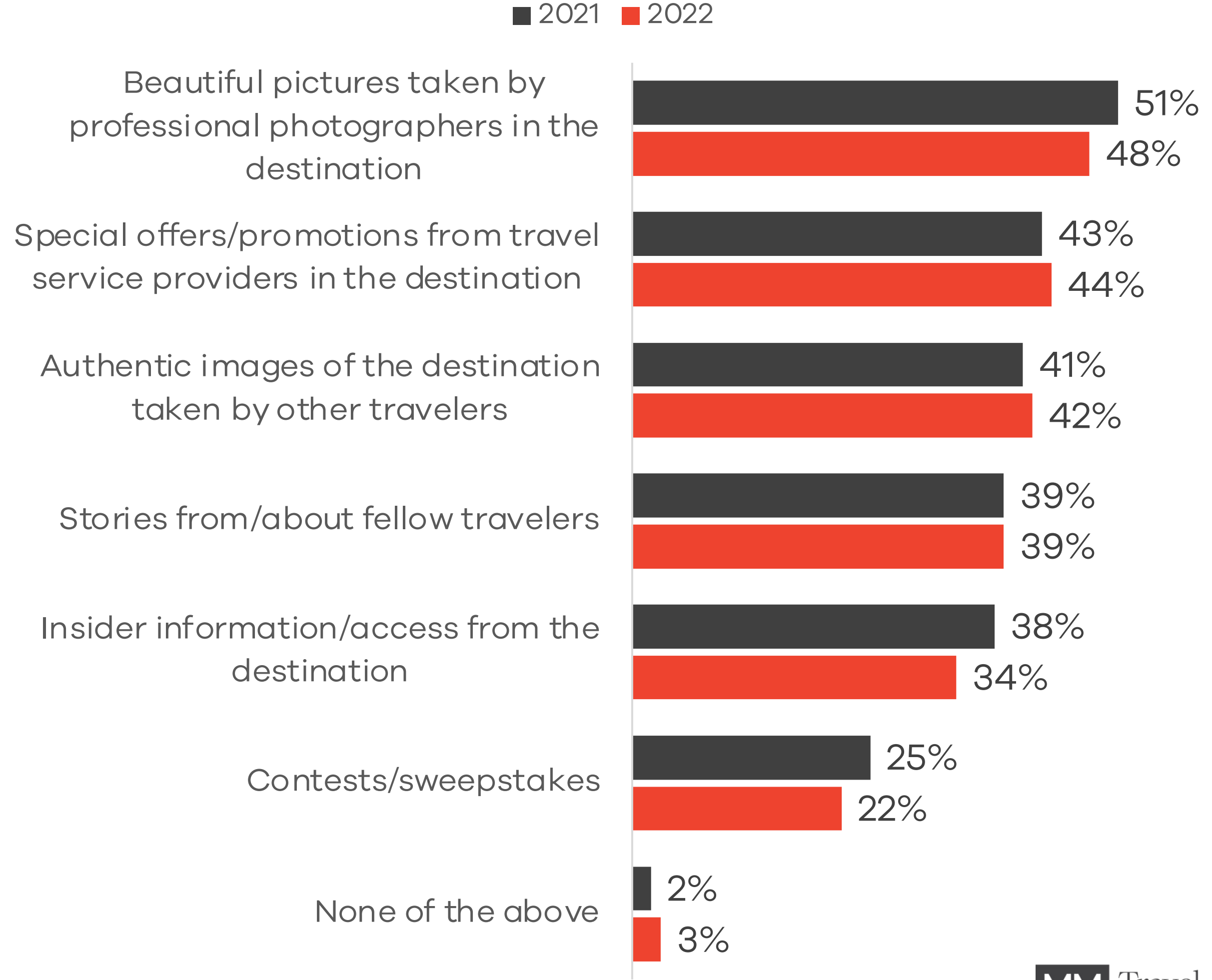
/ More younger travelers, travelers with higher incomes and travelers with kids follow a vacation destination on social media.

**Gen Zs: 41%**
**Millennials: 53%**
Gen Xers: 31%
Boomers: 14%

Have Kids: **52%**
Don't Have Kids: 23%

Less than $100K: 31%
More than $100K: **40%**

Valued Content on Social Media From Travel Destinations




**Base:** Active leisure travelers who have a page/profile on social media (n=2,721); those who follow a vacation destination on social media (n=955)
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"



MMGY Travel Intelligence

# Travel Service Providers on Social Media

37% 2021 31% 2022

of active leisure travelers follow a travel service provider on social media.

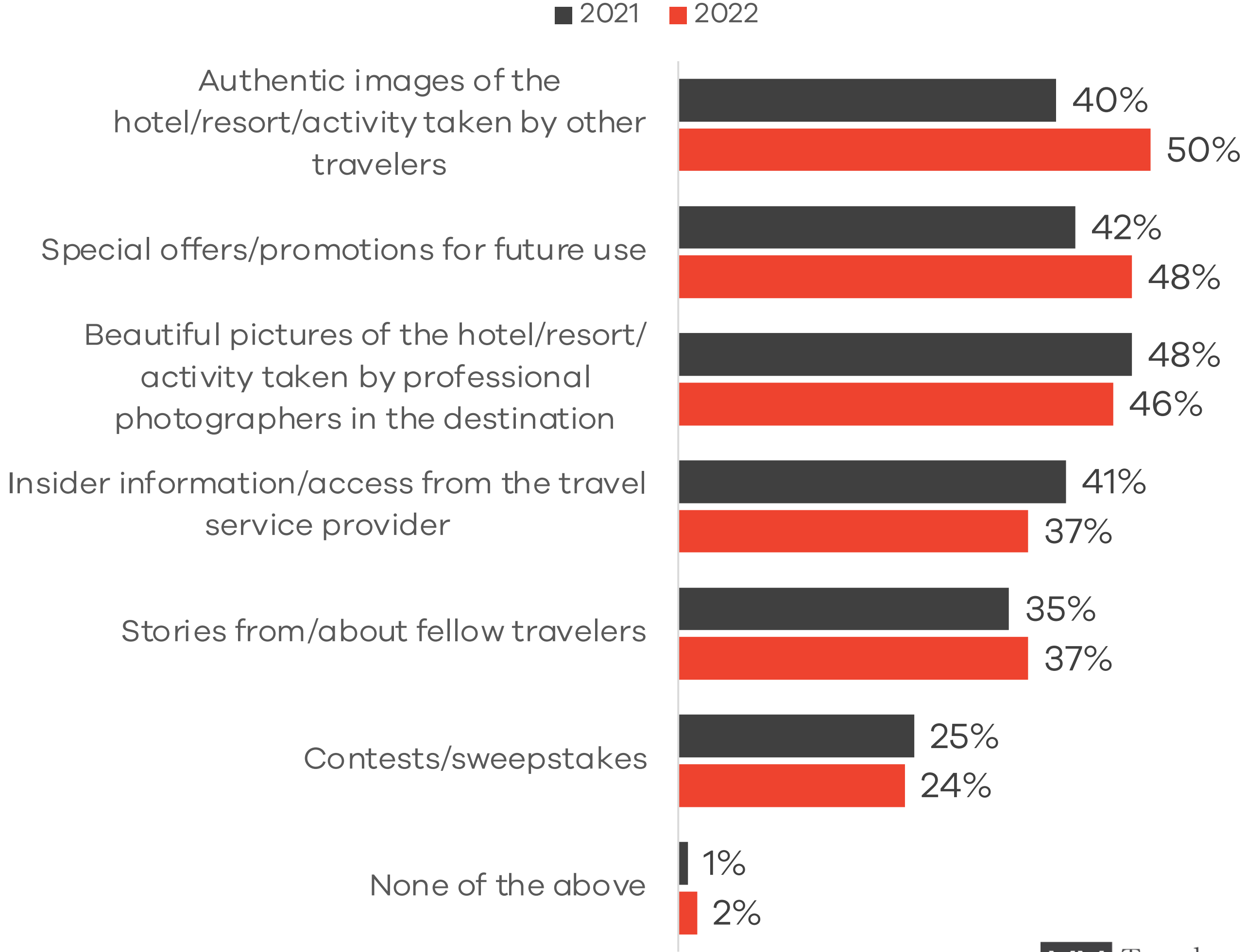
/ More younger travelers, travelers with higher incomes and travelers with kids follow a travel service provider on social media.

**Gen Zs: 37%**
**Millennials: 43%**
Gen Xers: 30%
Boomers: 14%

Have Kids: **48%**
Don't Have Kids: 20%

Less than $100K: 25%
More than $100K: **39%**

Valued Content on Social Media From Travel Service Brands




**Base:** Active leisure travelers who have a page/profile on social media (n=2,721); those who follow a travel service provider on social media (n=851)
**Source:** MMGY Global's 2022 *Portrait of American Travelers®* "Fall Edition"



MMGY Travel Intelligence


# Younger Generations Are Most Likely to Follow a Celebrity or Influencer on Social Media.



46% 2021 46% 2022

of active travelers follow a celebrity or influencer on social media.

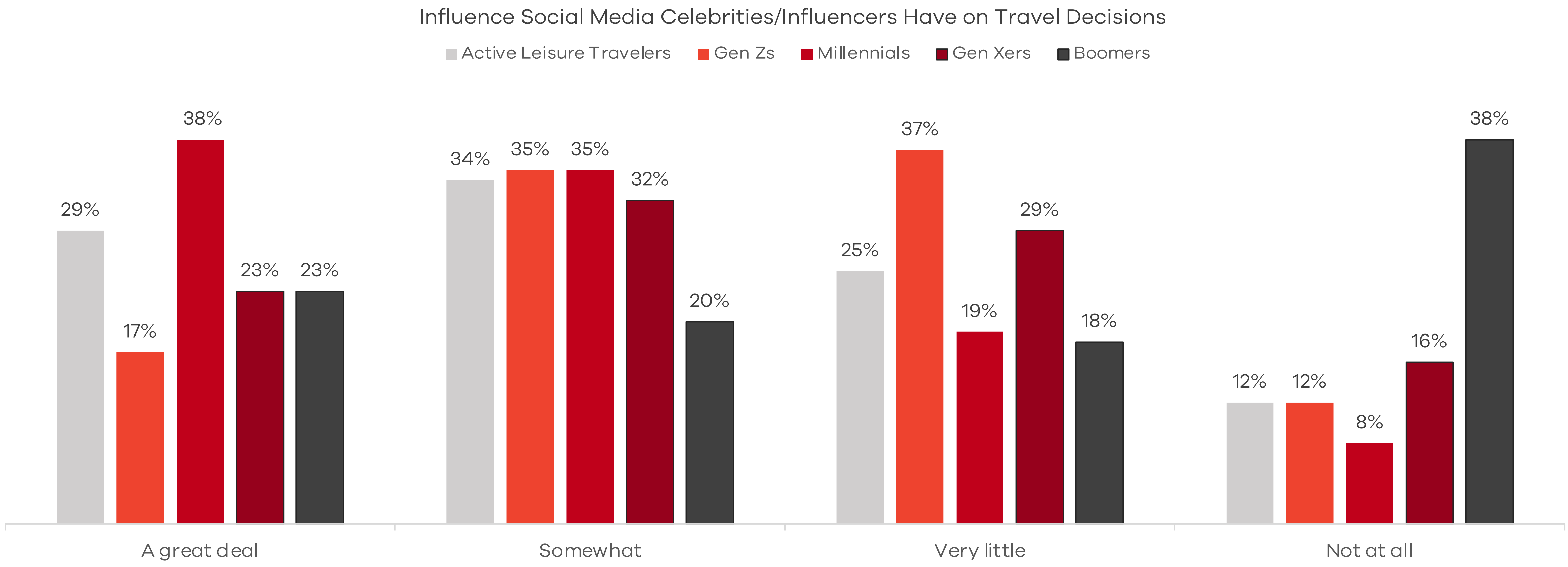
/ More younger travelers, travelers with lower incomes and travelers with kids follow a celebrity or influencer on social media.

**Gen Zs: 82%**
**Millennials: 64%**
Gen Xers: 35%
Boomers: 10%

Have Kids: **63%**
Don't Have Kids: 34%

Less than $100K: **49%**
More than $100K: 42%

# Similarly, Millennials are the most influenced by social media celebrities and influencers when making travel decisions.




**Base:** Active leisure travelers who have a page/profile on social media and who follow a celebrity or influencer on social media (n=1,243)
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"

66% 2021 51% 2022

of active travelers who follow a celebrity or influencer on social media have made a travel purchase based at least partially on a post by a celebrity or influencer.

/ More Millennials, travelers with higher incomes and travelers with kids have made a travel purchase based at least partially on a post by a celebrity or influencer.

Gen Zs: 47%
**Millennials: 57%**
Gen Xers: 45%
Boomers: 32%

Have Kids: **61%**
Don't Have Kids: 38%

Less than $100K: 42%
More than $100K: **65%**

**Base:** Active leisure travelers who have a page/profile on social media and who follow a celebrity or influencer on social media (n=1,243)
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"



# Social Media Agreement Statements

/ Millennials are using social media to seek out and share their travel experiences more so than other generations.

| % Who Agree With Each Statement | Active Leisure Travelers | Gen Zs | Millennials | Gen Xers | Boomers |
|---|---|---|---|---|---|
| I like using social media to share my travel experiences | 47% | 46% | **64%** | 45% | 27% |
| I am likely to share travel content on social media while traveling | 42% | 45% | **59%** | 41% | 19% |
| I seek out "Instagrammable" photo opportunities while exploring a destination | 33% | 36% | **51%** | 29% | 9% |
| A destination's "Instagrammability" influences my choice of where to go on vacation | 27% | 30% | **44%** | 24% | 6% |
| I post my vacation photos on social media to make my friends jealous | 27% | 24% | **43%** | 27% | 9% |

**Base:** Those who have at least one page or profile on a social media network
(Active leisure travelers: n=2,721; Gen Zs: n=370; Millennials: n=927; Gen Xers: n=709; Boomers: n=638)
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"



MMGY Travel Intelligence

# SOCIAL MEDIA HABITS SUMMARY

## KEY TAKEAWAY:

- Social media continues to be an important source of information and inspiration when planning travel, especially among younger generations. Eight in 10 active leisure travelers have a personal page or profile on social media (83%) with Facebook (72%), Instagram (53%) and YouTube (49%) being the most popular. All of Gen Z (100%) and nearly all Millennials (97%) have a personal page on social media. Among those who are active on social media, 47% have selected a vacation destination or travel service provider based at least partially on information viewed on social media, with 60% of Gen Zs and 61% of Millennials indicating the same. These travelers – specifically Millennials – are also likely to share their travel experiences on social media, with 6 in 10 Millennials agreeing that they like using social media to share their travel experiences (64%) and that they are likely to share travel content on social media when traveling (59%). Half seek out Instagrammable photo opportunities while exploring a destination (51%).

MMGY Travel Intelligence

# SOCIAL MEDIA HABITS SUMMARY

## KEY TAKEAWAY:

- While the percentage of travelers who follow vacation destinations (down from 39% to 35%) and travel service providers (down from 37% to 31%) decreased from last year, a similar percentage are following celebrities or influencers (2021: 46%; 2022: 46%). Nearly half of active leisure travelers follow a celebrity or influencer on social media, highest among Gen Zs (82%) and Millennials (64%). Four in 10 Millennials indicate celebrities and influencers have a great deal of influence on their travel decisions (38%) with another 35% saying their decisions are somewhat influenced. Nearly 6 in 10 Millennials have made a travel purchase based at least partially on a post by a celebrity or influencer (57%).

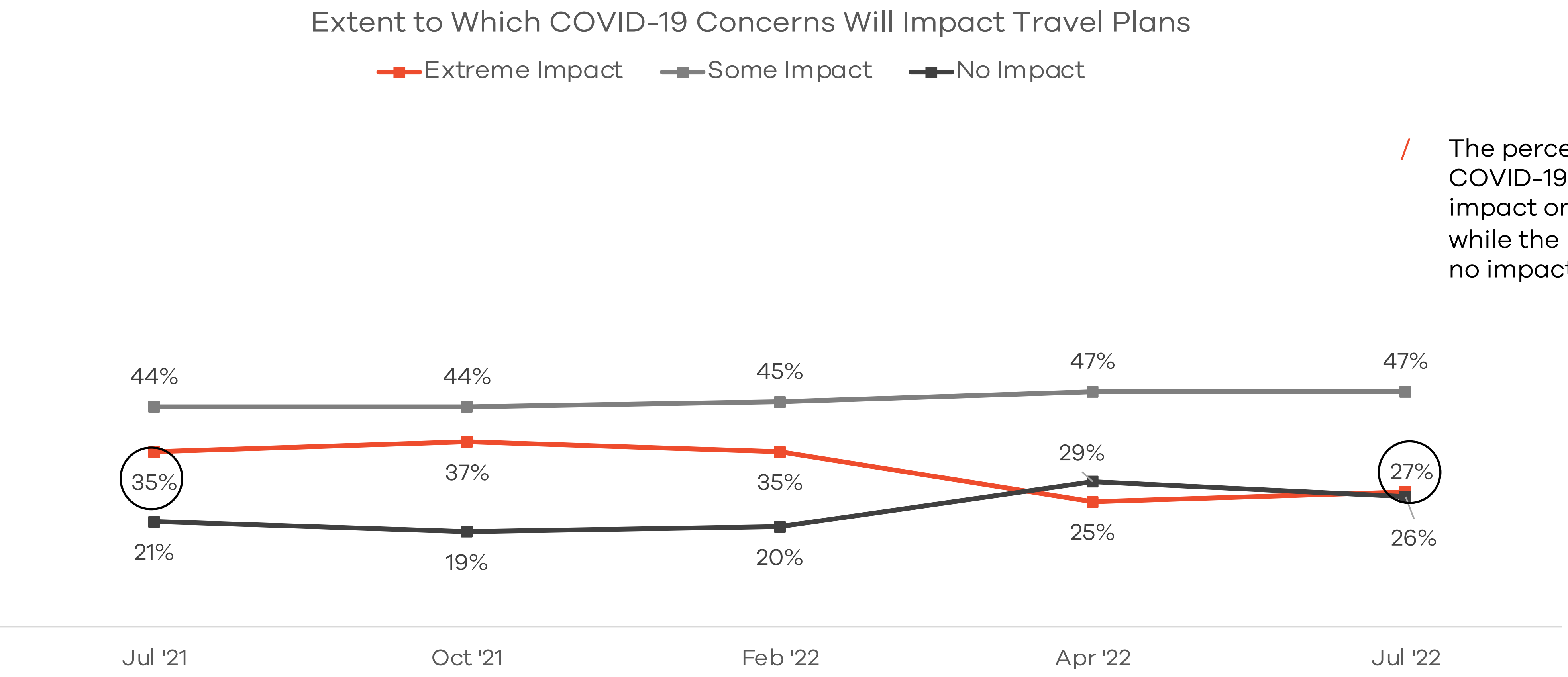
## WHAT IT MEANS:

- The reach and effectiveness of social media influencers remain strong and is an advantageous way to reach younger audiences.

# COVID-19 Vaccinations and Travel


MMGY Travel Intelligence

# When Making Travel Plans, Travelers Are Less Concerned About COVID-19 Than They Were One Year Ago




/ The percentage of travelers indicating COVID-19 concerns will have an extreme impact on travel decisions decreased, while the percentage saying it will have no impact increased.

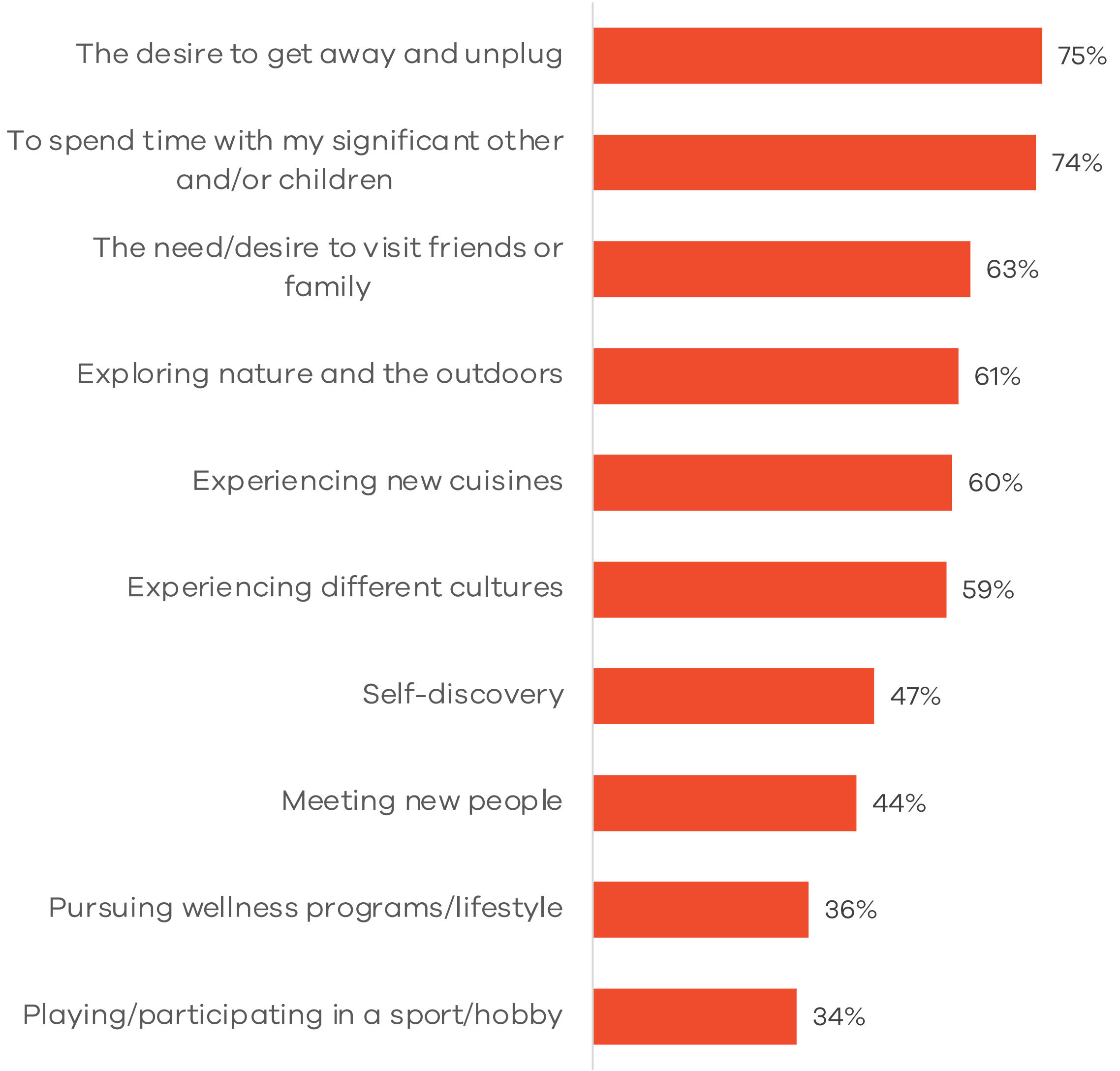
**Base:** Active leisure travelers (n=3,290)
**Source:** MMGY Global's 2022 *Portrait of American Travelers®* "Fall Edition"

# Vacation Motivators and Activities

# "Unplugging" and Spending Time With Family Are the Top Motivators to Travel.

**Base:** Active travelers (n=3,290)
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"

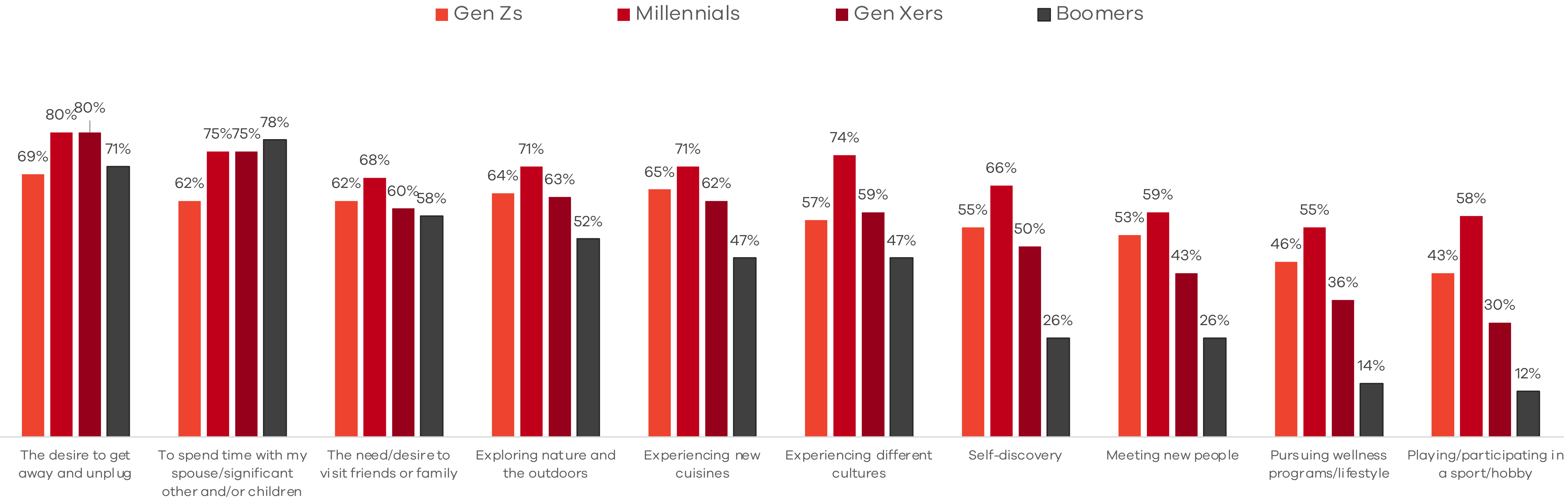
## Vacation Motivators




MMGY Travel Intelligence

# As Travelers Age, the Desire to Experience the New and Unique Is Replaced by the Urge to See Family and Relax

Vacation Motivators



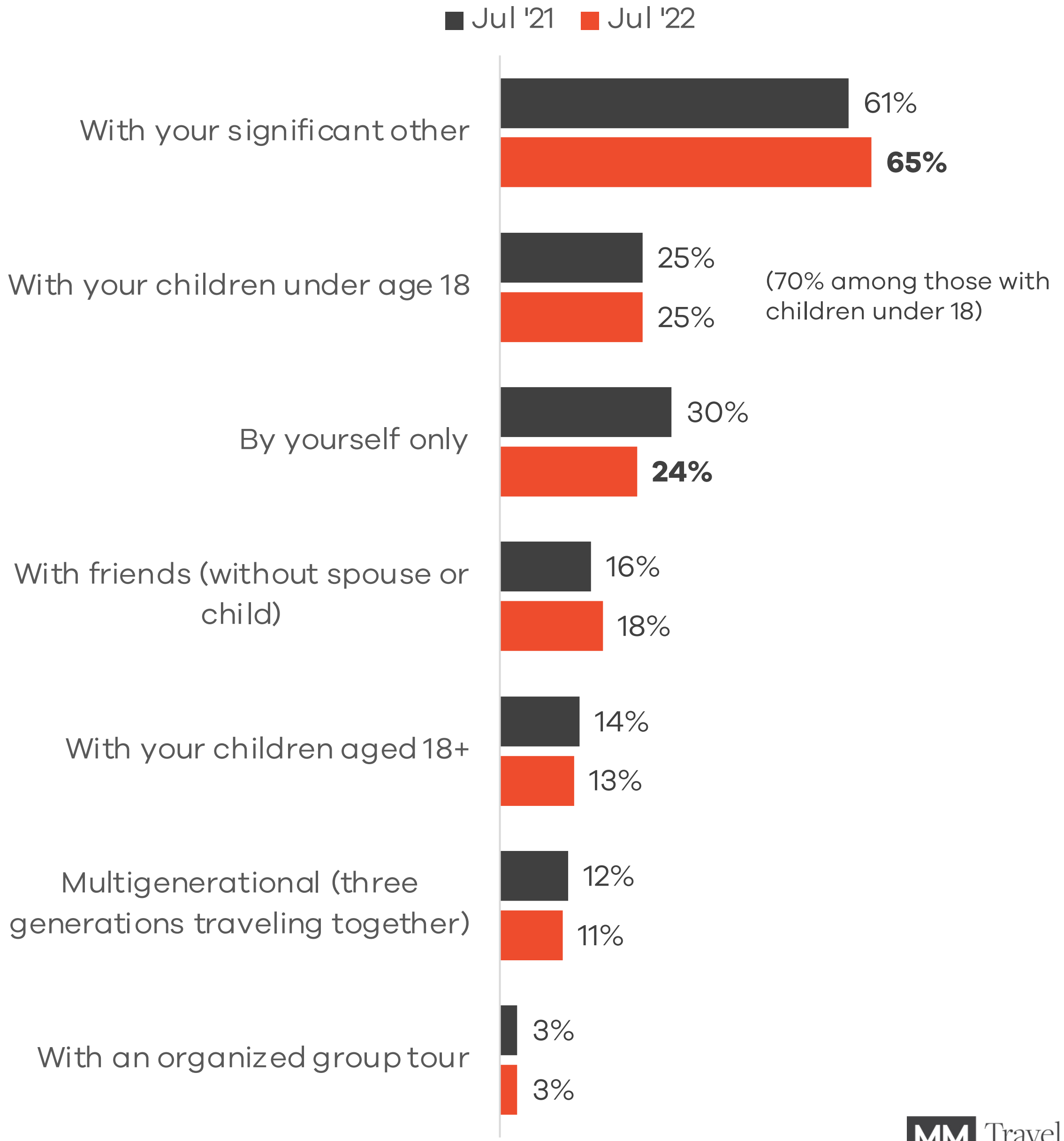

**Base:** Active leisure travelers (Gen Zs: n=402; Millennials: n=999; Gen Xers: n=777; Boomers: n=989)

**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"

# Couples Travel Remains the Most Common Form of Travel.

**Base:** Active leisure travelers who intend to travel during the next six months (n=2,865)
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"

## Travel Party During the Next Six Months

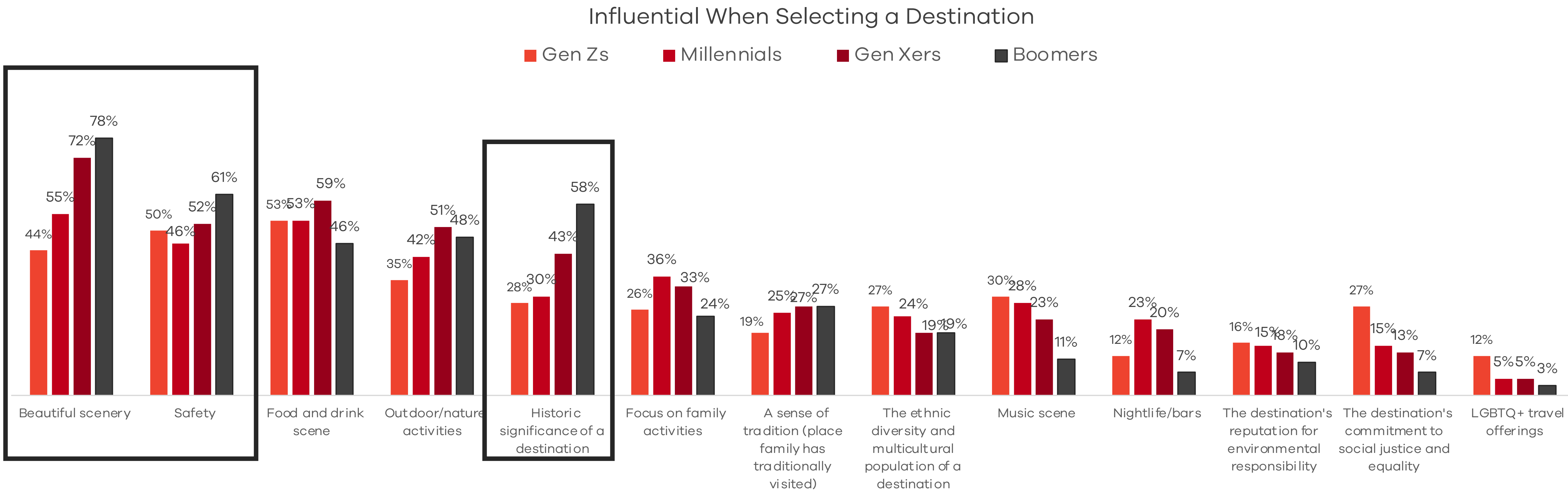


# Scenery, Safety, and the Food and Drink Scene Are the Most Influential Factors When Selecting a Destination

| Influential When Selecting a Destination (Top-2 Box) | Jul '21 | Jul '22 |
|---|---|---|
| Beautiful scenery | 64% | 65% |
| Safety | 52% | 53% |
| Food and drink scene | 48% | 52% |
| Outdoor/nature activities | 43% | 45% |
| Historic significance of a destination | 39% | 42% |
| Focus on family activities | 30% | 30% |
| A sense of tradition (place family has traditionally visited) | 26% | 25% |
| The ethnic diversity and multicultural population of a destination | 20% | 21% |
| Music scene | 21% | 21% |
| Nightlife/bars | 19% | 16% |
| The destination's reputation for environmental responsibility | 16% | 14% |
| The destination's commitment to social justice and equality | 13% | 14% |
| LGBTQ+ travel offerings | 7% | 5% |

**Base:** Active leisure travelers (July 2021: n=4,027; July 2022: n=3,290)
**Source:** MMGY Global's 2022 *Portrait of American Travelers®* "Fall Edition"

# Scenery, Safety and History Become More Important as a Traveler Gets Older




**Base:** Active leisure travelers (Gen Zs: n=402; Millennials: n=999; Gen Xers: n=777; Boomers: n=989)
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"

# Top Activities of Interest on Vacation

| | Jul '21 | Jul '22 |
|---|---|---|
| Beach experiences | 47% | 47% |
| Historical sites | 43% | 45% |
| Visiting a state or national park | 45% | 45% |
| Shopping | 43% | 43% |
| Visiting a museum | 38% | 39% |
| Visiting a zoo or aquarium | NA | 36% |
| Visiting a theme or amusement park | 31% | 31% |
| Visiting notable architectural sites | 29% | 30% |
| Dining cruise | NA | 27% |
| Hiking/climbing/biking/other outdoor adventures | 27% | 27% |
| Casino gambling | 27% | 27% |
| Attending a concert/music festival | 26% | 26% |
| Guided tours with access to local experiences that are otherwise inaccessible | 26% | 25% |
| Adventure travel | 21% | 22% |
| Dinner theatre | NA | 21% |
| Nightlife | 22% | 20% |
| Camping | NA | 19% |
| Exploring family's ancestry/past on a heritage vacation | 20% | 19% |
| Attending a sporting event | 18% | 18% |
| Water sports (waterskiing, boating/rafting) | 17% | 18% |
| Spa services (massages, facials, etc.) | 20% | 17% |
| Film/art festivals | 15% | 16% |
| Attending performing arts events | 18% | 16% |
| Playing golf | 11% | 13% |

**Base:** Active leisure travelers (July 2021: n=4,027; July 2022: n=3,290)
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"

# Beach Experiences, Visiting State or National Parks, And Shopping Are Top Activities of Interest for All Generations

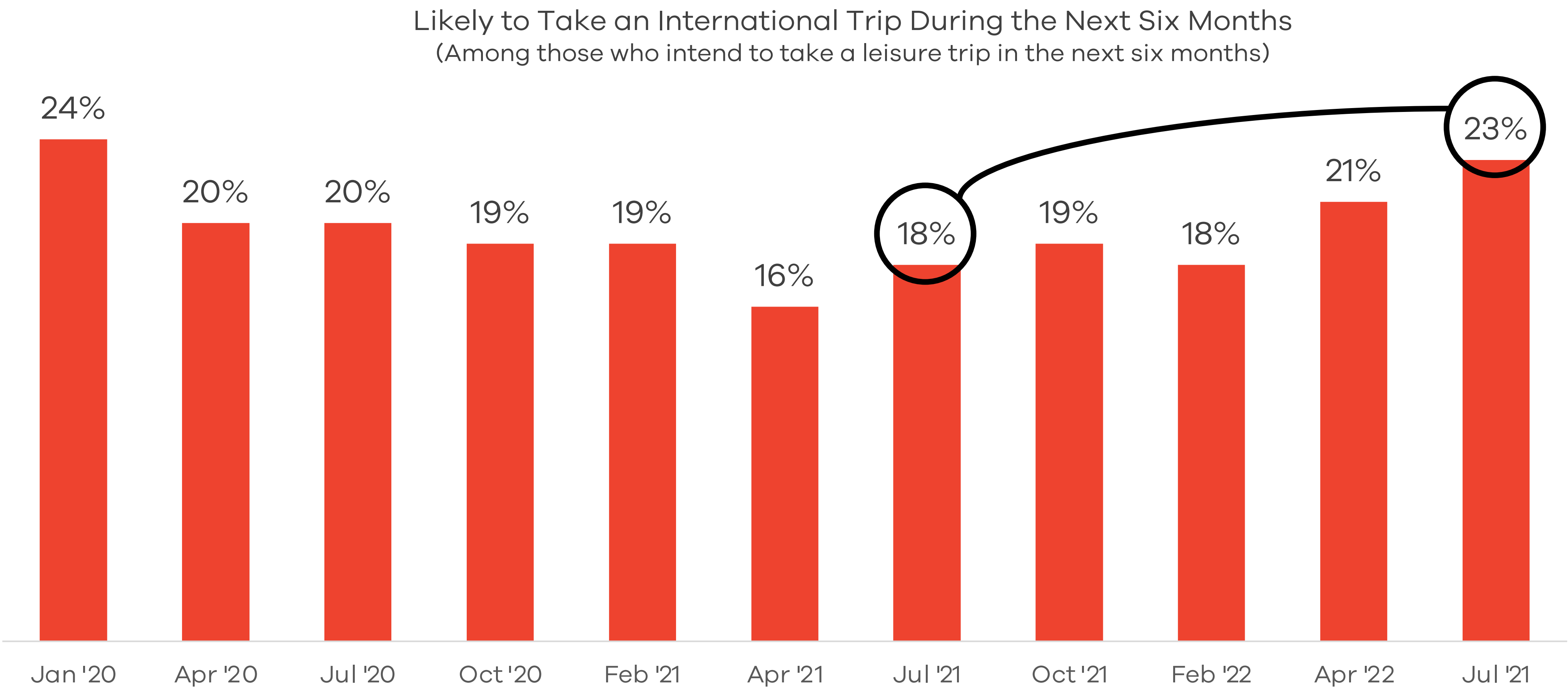
*Top five vacation activities for each generation are shaded in black.*

| Interest in Vacation Activities (Top 20) | Gen Zs | Millennials | Gen Xers | Boomers |
|---|---|---|---|---|
| Beach experiences | 31% | 42% | 58% | 52% |
| Historical sites | 26% | 30% | 48% | 64% |
| Visiting a state or national park | 33% | 35% | 48% | 57% |
| Shopping | 44% | 44% | 47% | 38% |
| Visiting a museum | 32% | 30% | 42% | 49% |
| Visiting a zoo or aquarium | 31% | 37% | 40% | 35% |
| Visiting a theme or amusement park | 35% | 34% | 37% | 23% |
| Visiting notable architectural sites | 18% | 24% | 32% | 38% |
| Dining cruise | 16% | 22% | 30% | 33% |
| Hiking/climbing/biking/other outdoor adventures | 16% | 31% | 33% | 26% |
| Casino gambling | 18% | 29% | 28% | 28% |
| Attending a concert/music festival | 27% | 28% | 25% | 26% |
| Guided tours with access to local experiences that are otherwise inaccessible | 13% | 19% | 26% | 34% |
| Adventure travel (safaris, mountain climbing, trekking vacations, etc.) | 26% | 25% | 26% | 15% |
| Dinner theatre | 18% | 20% | 23% | 21% |
| Nightlife | 19% | 27% | 26% | 10% |
| Camping | 23% | 26% | 20% | 12% |
| Exploring family's ancestry/past on a heritage vacation | 20% | 20% | 19% | 17% |
| Attending a sporting event | 16% | 18% | 20% | 19% |
| Water sports (waterskiing, boating/rafting) | 18% | 22% | 25% | 10% |

**Base:** Active leisure travelers (Gen Zs: n=402; Millennials: n=999; Gen Xers: n=777; Boomers: n=989)
**Source:** MMGY Global's 2022 *Portrait of American Travelers®* "Fall Edition"

# International Travel Intentions

# Likelihood to Take an International Trip Has Increased Significantly




**Base:** Active leisure travelers who intend to travel during the next six months (n=2,865)
**Source:** MMGY Global's 2022 *Portrait of American Travelers®* "Fall Edition"



MMGY Travel Intelligence

# Measured Interest in International Travel Increased Compared to a Year Ago

**73%** 2021 **79%** 2022

of active leisure travelers are interested in traveling internationally during the next two years.

**Gen Zs: 87%**
**Millennials: 85%**
Gen Xers: 80%
Boomers: 71%

Have Kids: **87%**
Don't Have Kids: 75%

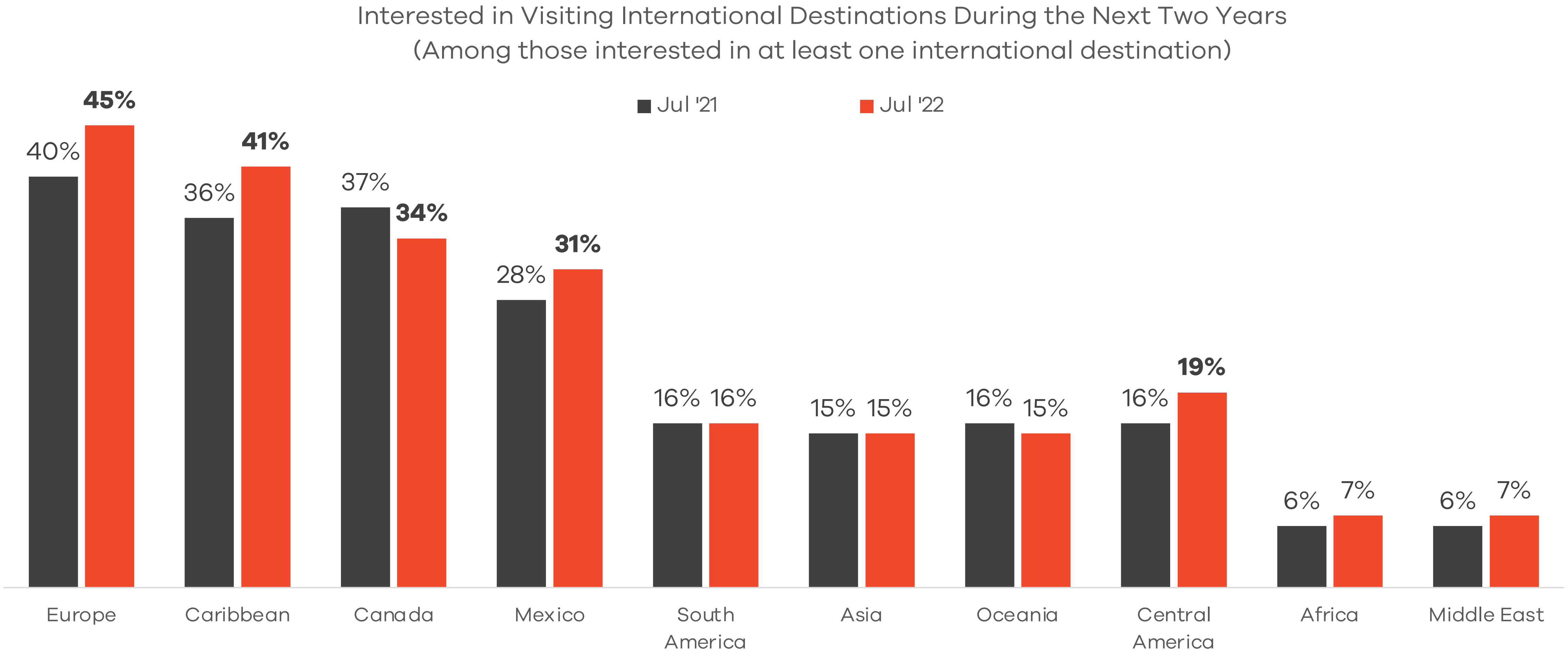
Less than $100K: 75%
More than $100K: **84%**

/ Younger generations, travelers with higher incomes and travelers with kids are more interested in traveling internationally.

**Base:** Active leisure travelers (n=3,290)
**Source:** MMGY Global's 2022 *Portrait of American Travelers®* "Fall Edition"

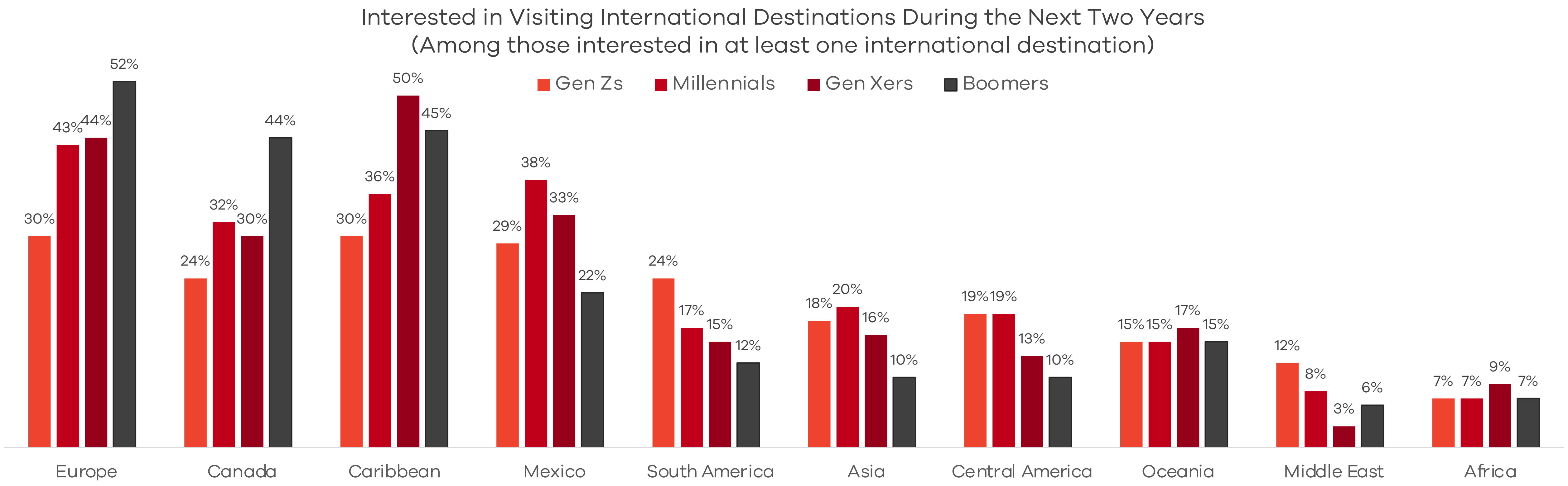
MMGY Travel Intelligence

# Interest in Visiting Europe, the Caribbean, Mexico and Central America Increased From One Year Ago




Data in bold indicates a significant difference from 2021.
**Base:** Active leisure travelers interested in at least one international destination (n=2,604)
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"

# Interest in the More Popular International Destinations Increases With Age



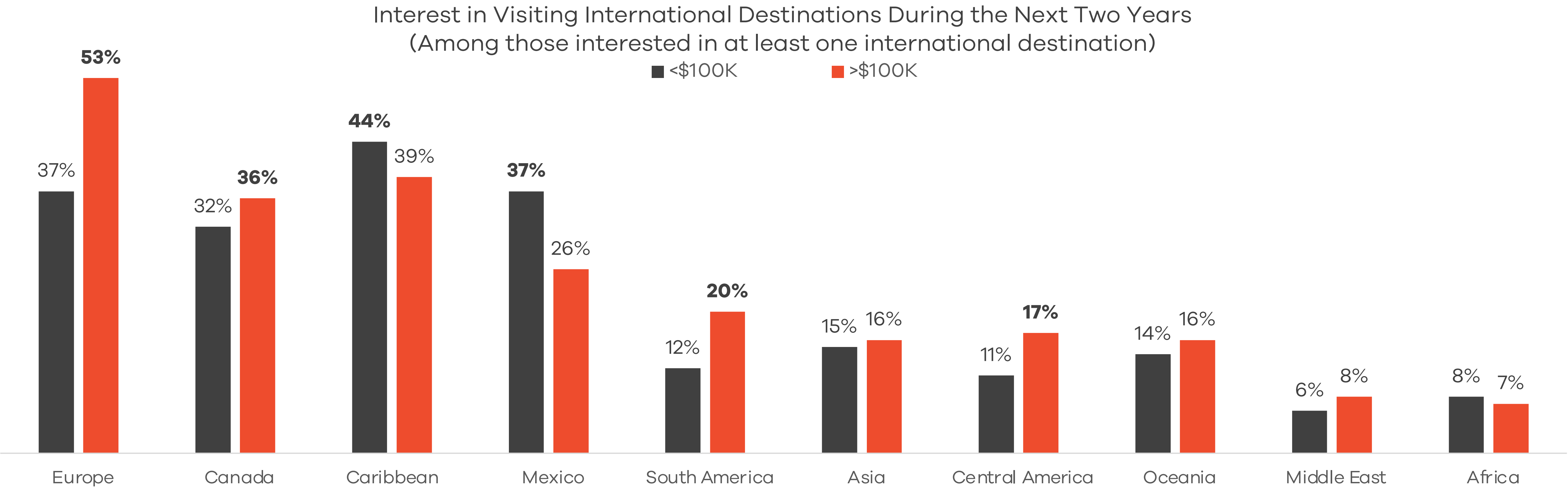

**Base:** Active leisure travelers interested in at least one international destination (Gen Zs: n=321; Millennials: n=815; Gen Xers: n=646; Boomers: n=715)

**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"

MMGY Travel Intelligence

# Interest in Some International Destinations Varies by Household Income

/ Europe, Canada, South America and Central America are more appealing to travelers with a higher household income, while the Caribbean and Mexico are more appealing to travelers with a lower household income.




Data in bold indicates a significant difference.

**Base:** Active leisure travelers interested in at least one international destination (<$100K: n=1,289; >$100K: n=1,315)

**Source:** MMGY Global's 2022 *Portrait of American Travelers®* "Fall Edition"



MMGY Travel Intelligence

# Caribbean, Mexico and Canada Destinations Interested in Visiting During the Next Two Years

| Caribbean Destinations Interested in Visiting During the Next Two Years | Jul '21 | Jul '22 |
|---|---|---|
| The Bahamas | 53% | 54% |
| U.S. Virgin Islands | 42% | 43% |
| Jamaica | 36% | 35% |
| Puerto Rico | 33% | 32% |
| Cayman Islands | 34% | 34% |
| Aruba | 33% | 33% |
| St. Maarten/St. Martin | 31% | 31% |
| Dominican Republic | 27% | **23%** |
| Barbados | 26% | 27% |
| British Virgin Islands | 20% | 22% |
| Bermuda | 28% | **23%** |
| Antigua | 18% | 20% |
| Cuba | 12% | 13% |
| Other | 4% | 4% |

| Mexico Destinations Interested in Visiting During the Next Two Years | Jul '21 | Jul '22 |
|---|---|---|
| Cancún | 53% | **58%** |
| Los Cabos/Cabo San Lucas | 33% | **41%** |
| Mexico City | 31% | **36%** |
| Puerto Vallarta | 34% | 33% |
| Cozumel | 27% | 30% |
| Riviera Maya | 26% | 26% |
| Guadalajara | 16% | 13% |
| Other | 8% | 5% |

| Canada Destinations Interested in Visiting During the Next Two Years | Jul '21 | Jul '22 |
|---|---|---|
| Toronto | 47% | 49% |
| Vancouver | 43% | **48%** |
| Montreal | 40% | 43% |
| Quebec | 36% | 36% |
| Victoria | 24% | **29%** |
| Banff | 18% | 21% |
| Whistler | 15% | 17% |
| Ottawa | 19% | **15%** |
| Other | 8% | 9% |

Data in bold indicates a significant difference from 2021.

**Base:** Active leisure travelers interested in visiting the Caribbean (n=1,078)/Mexico (n=812)/Canada (n=887)

**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"

# INTERNATIONAL TRAVEL SUMMARY

## KEY TAKEAWAY:

- Likelihood to travel internationally and interest in international travel continue to rise, with younger generations, those with higher household incomes and those with children reporting the most interest. One-quarter of those planning to travel in the next six months (23%) are likely to take an international trip during that time, up from 21% in the “Summer Edition” and 18% in 2021. This percentage is similar to the 24% measured in February 2020. Among all active leisure travelers, 8 in 10 are interested in traveling internationally during the next two years, also up from this time last year (73%). Interest in visiting Europe, the Caribbean, Mexico and Central America has increased from last year (Europe: up from 40% to 45%; the Caribbean: up from 36% to 41%; Mexico: up from 28% to 31%; and Central America: up from 16% to 19%).

## WHAT IT MEANS:

- With the lessening of travel requirements including the elimination of the pre-travel testing requirements when entering the U.S., we’re seeing the likelihood of international travel increasing back to pre-pandemic levels. Despite a decrease in overall travel intentions, international travel continues to be in demand after being off limits for so long.

MMGY Travel Intelligence

# Respondent Demographics

# Traveler Personas

% who self-identify with each descriptor

| | 2021 | 2022 |
|---|---|---|
| Beach lover | 39% | 39% |
| Foodie | 33% | 37% |
| Pet lover | 34% | 35% |
| Family traveler | NA | 31% |
| Travel bargain hunter | NA | 28% |
| Moderate (politically) | 20% | 24% |
| Sports fan/enthusiast | 21% | 24% |
| Outdoor adventurer | 23% | 23% |
| Cruise lover | NA | 21% |
| Conservative (politically) | 19% | 22% |
| Theme park enthusiast | NA | 20% |
| World traveler | 19% | 21% |
| Environmentally-conscious | 18% | 19% |
| Liberal (politically) | 16% | 19% |
| Wine enthusiast | 16% | 18% |
| All-inclusive resort enthusiast | NA | 17% |
| Concert/festival enthusiast | 18% | 17% |
| Luxury traveler | 15% | 16% |
| Golf enthusiast | 8% | 10% |
| Recreational cannabis user | 10% | 9% |
| Social justice activist | 9% | 9% |
| Road warrior (business travel) | NA | 6% |
| Ski/snowboard enthusiast | 6% | 6% |



**Source:** MMGY Global's 2022 *Portrait of American Travelers®* "Fall Edition"

# Respondent Demographics

| | Active Leisure Travelers | Gen Zs | Millennials | Gen Xers | Boomers |
|---|---|---|---|---|---|
| Male | 54% | 43% | 54% | 51% | 59% |
| Female | 46% | 52% | 45% | 49% | 41% |
| Other | 1% | 4% | 0% | 0% | 0% |
| | | | | | |
| Gen Zs | 12% | 100% | - | - | - |
| Millennials | 30% | - | 100% | - | - |
| Gen Xers | 24% | - | - | 100% | - |
| Boomers | 30% | - | - | - | 100% |
| | | | | | |
| Household income (median) | $94.4K | $62K | $89K | $100K | $111K |
| | | | | | |
| Have children under 18 at home | 35% | 37% | 67% | 39% | 3% |
| | | | | | |
| White | 76% | 51% | 69% | 77% | 91% |
| Hispanic | 17% | 35% | 25% | 14% | 6% |
| African American/Black | 13% | 38% | 15% | 10% | 5% |
| Asian | 6% | 5% | 8% | 9% | 4% |
| Native American | 2% | 1% | 5% | 2% | 0% |
| Pacific Islander | 0% | 1% | 1% | 1% | 0% |
| Other | 3% | 6% | 5% | 2% | 0% |



**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"

# Respondent Demographics

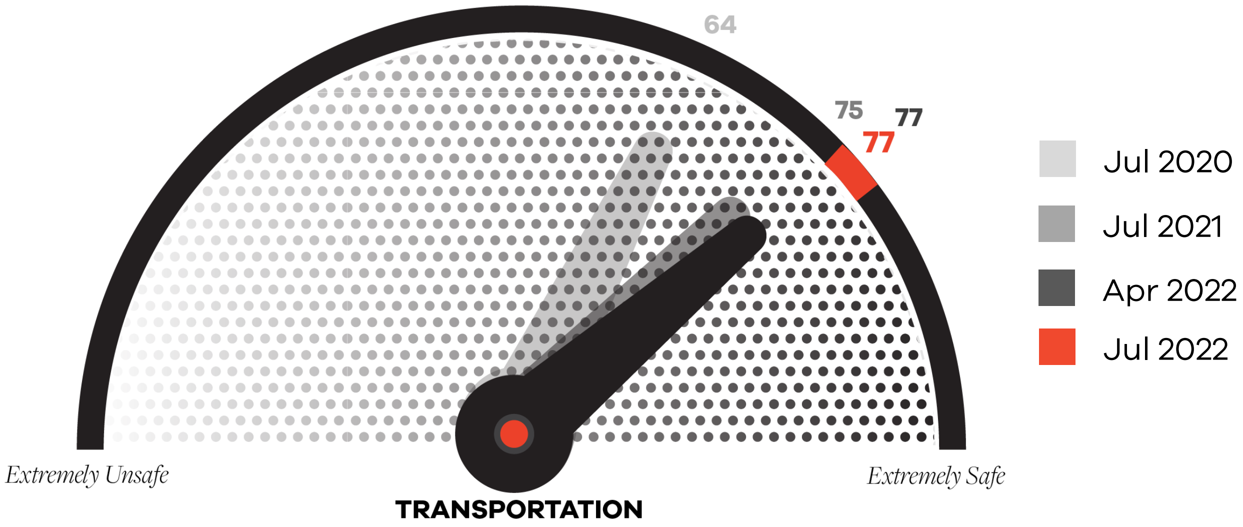
| | Active Leisure Travelers | Gen Zs | Millennials | Gen Xers | Boomers |
|---|---|---|---|---|---|
| Married/living together | 70% | 47% | 67% | 70% | 80% |
| Never married | 20% | 51% | 26% | 17% | 7% |
| Divorced/separated/widowed | 10% | 2% | 7% | 13% | 13% |
| | | | | | |
| 4 years or less of high school | 32% | 45% | 35% | 27% | 28% |
| 1–3 years of college | 28% | 34% | 22% | 29% | 30% |
| 4 years of college | 26% | 15% | 27% | 30% | 26% |
| Some graduate school | 3% | 3% | 4% | 3% | 3% |
| Graduate/professional degree | 11% | 3% | 12% | 11% | 13% |
| | | | | | |
| Employed (full-time or part-time) | 60% | 62% | 85% | 77% | 28% |
| Retired | 25% | 0% | 1% | 7% | 65% |
| Temporarily unemployed | 5% | 11% | 6% | 5% | 2% |
| Homemaker (full-time) | 7% | 5% | 8% | 11% | 4% |
| Student | 3% | 22% | 0% | 0% | 0% |

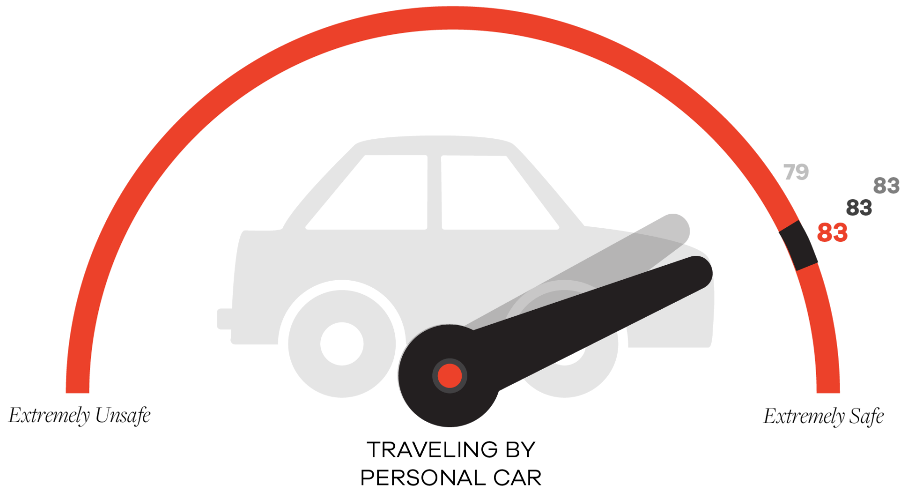


**Source:** MMGY Global's 2022 *Portrait of American Travelers®* "Fall Edition"

# Appendix

# Perceived Safety of Transportation



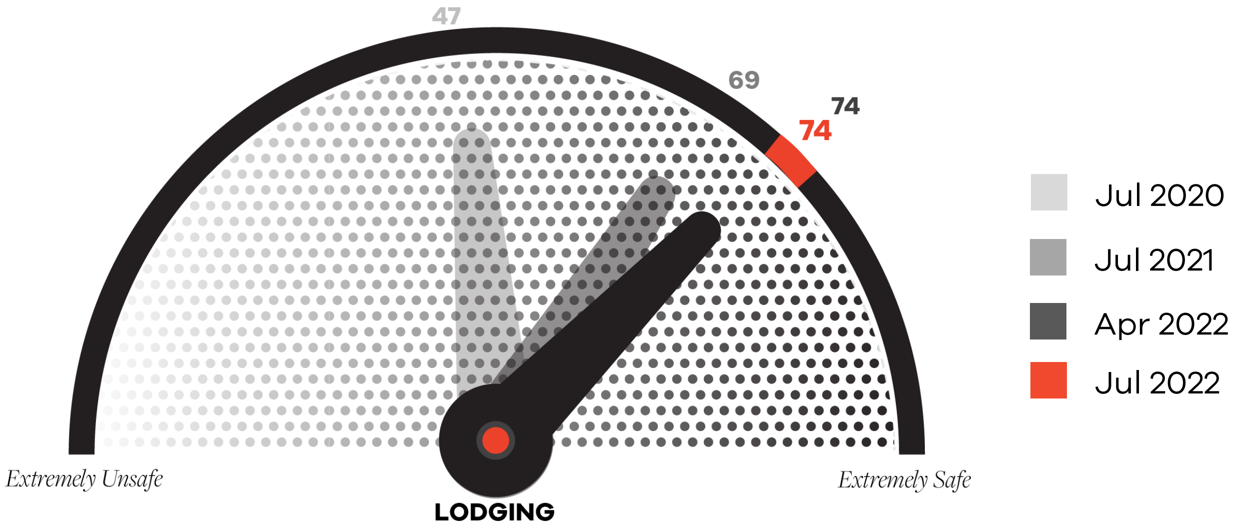





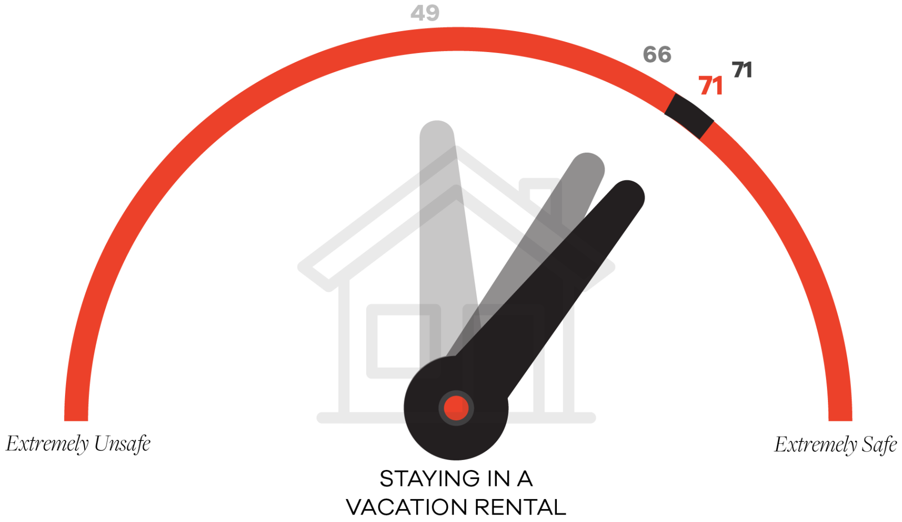
Travel Safety Barometer

**Base:** U.S. adults (n=4,551)
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"

# Perceived Safety of Lodging





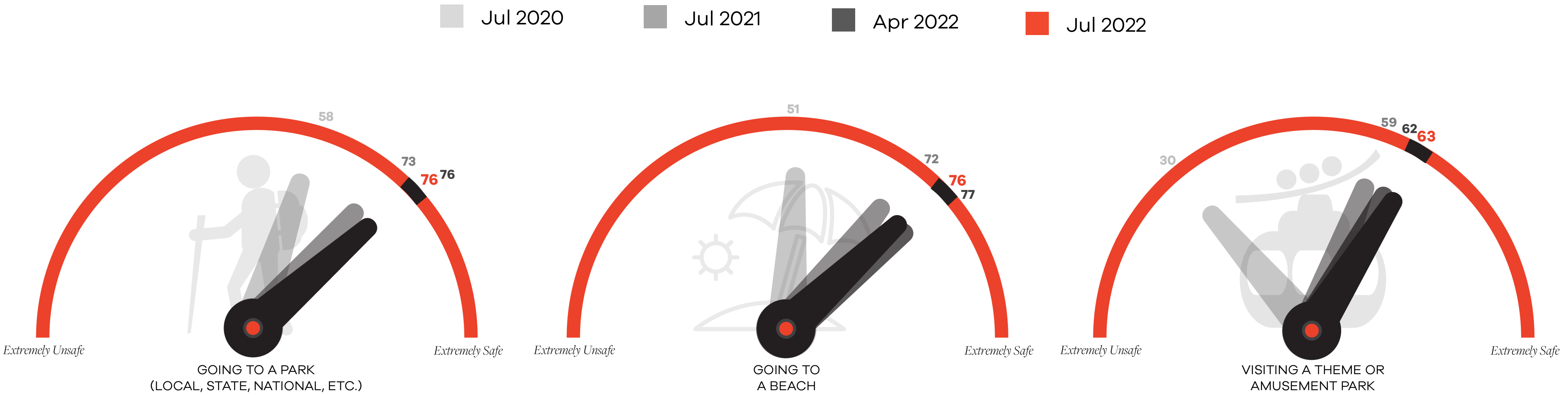



Travel Safety Barometer

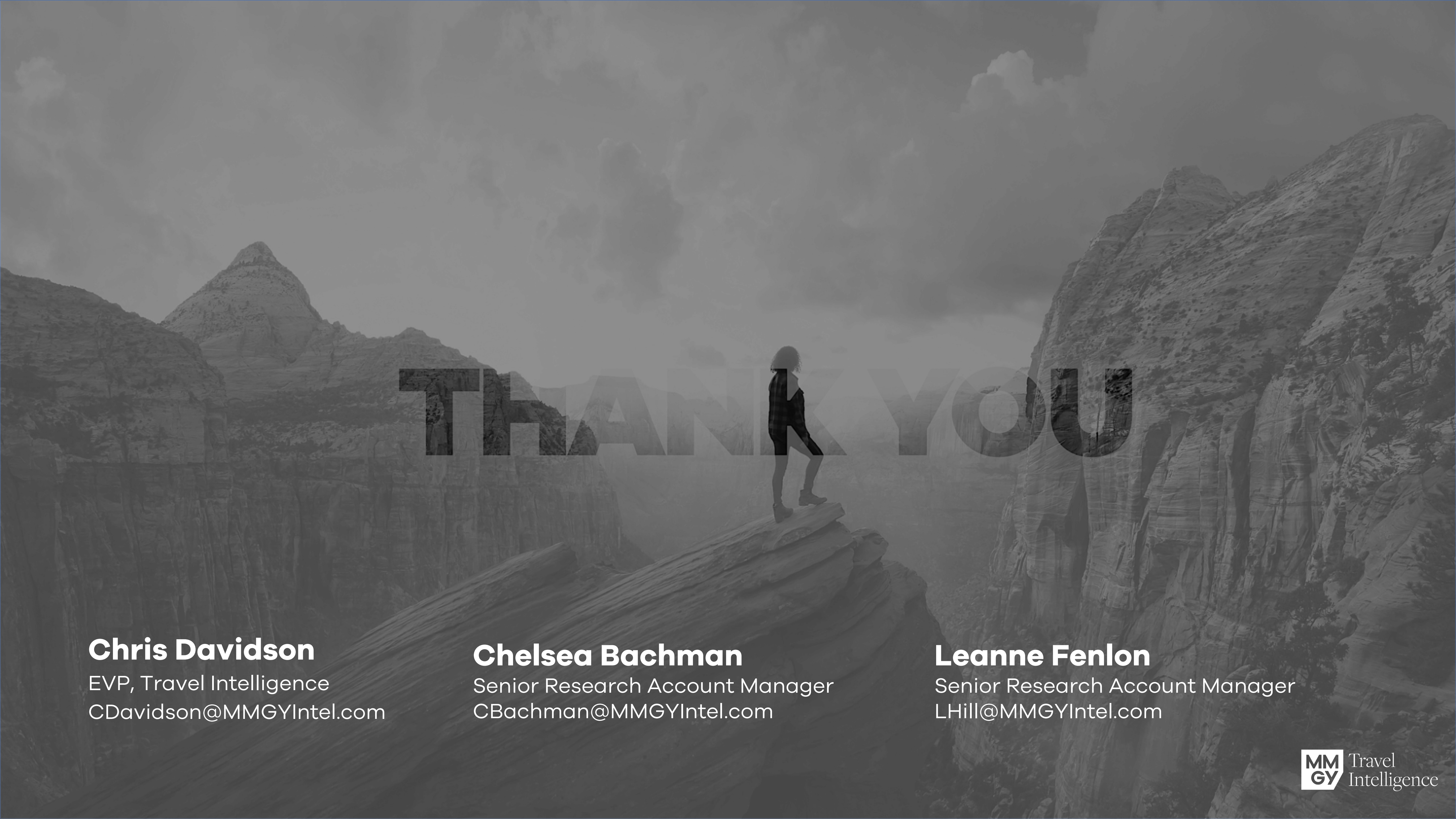
**Base:** U.S. adults (n=4,551)
**Source:** MMGY Global's 2022 *Portrait of American Travelers®* "Fall Edition"

MMGY Travel Intelligence

# Perceived Safety of Specific Activities




**Base:** U.S. adults (n=4,551)
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Fall Edition"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