MMGY Travel Intelligence

Winter Edition 2022

PORTRAIT OF AMERICAN TRAVELERS®

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 4,529 U.S. adults in October 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 3,338 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	11%
Millennials	25–40	29%
Gen Xers	41–56	25%
Boomers	57–75	31%
Silent/GI	76+	4%

Travel Outlook Snapshot

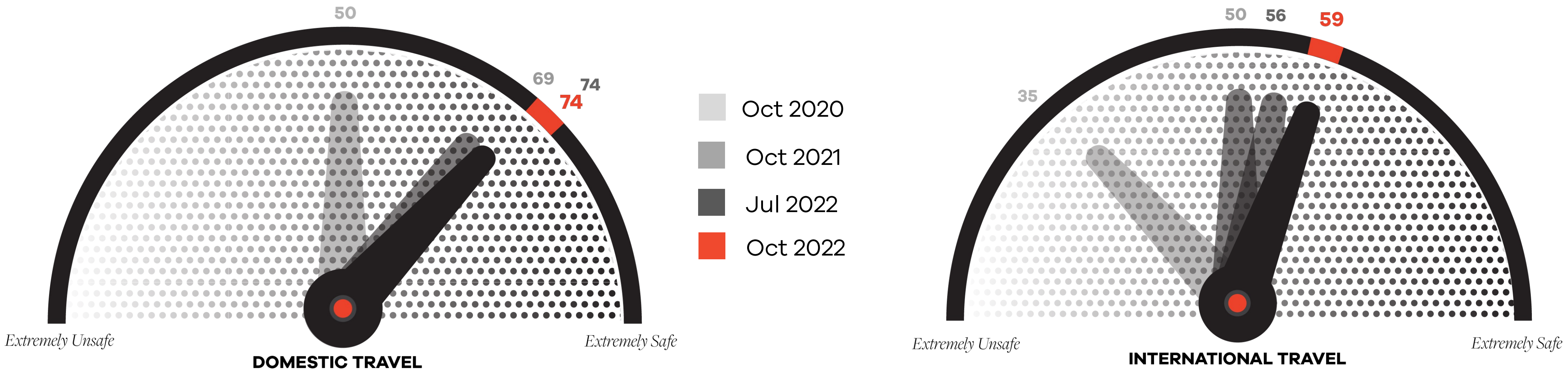
MMGY Travel Intelligence

Perceived Safety of Travel Continues to Increase Since the Start of the 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 9 points from one year ago.

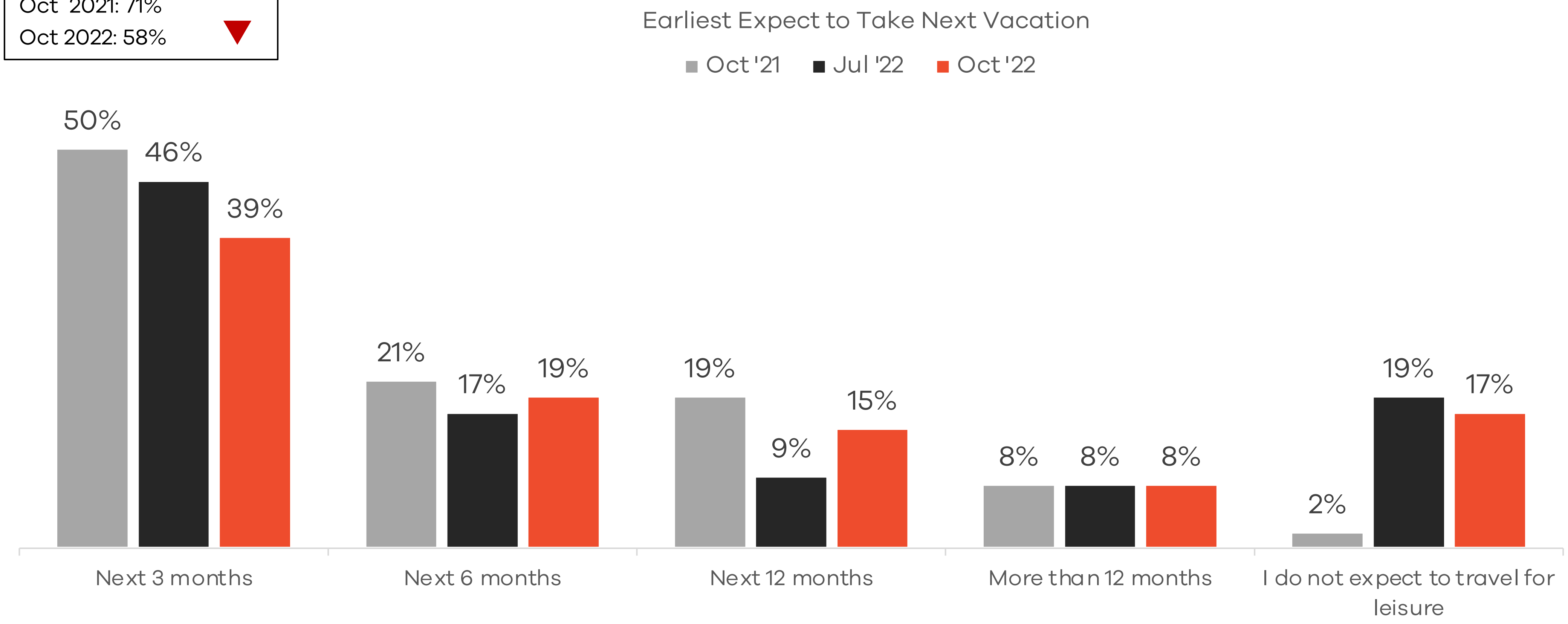


Base: U.S. adults (n=4,529)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

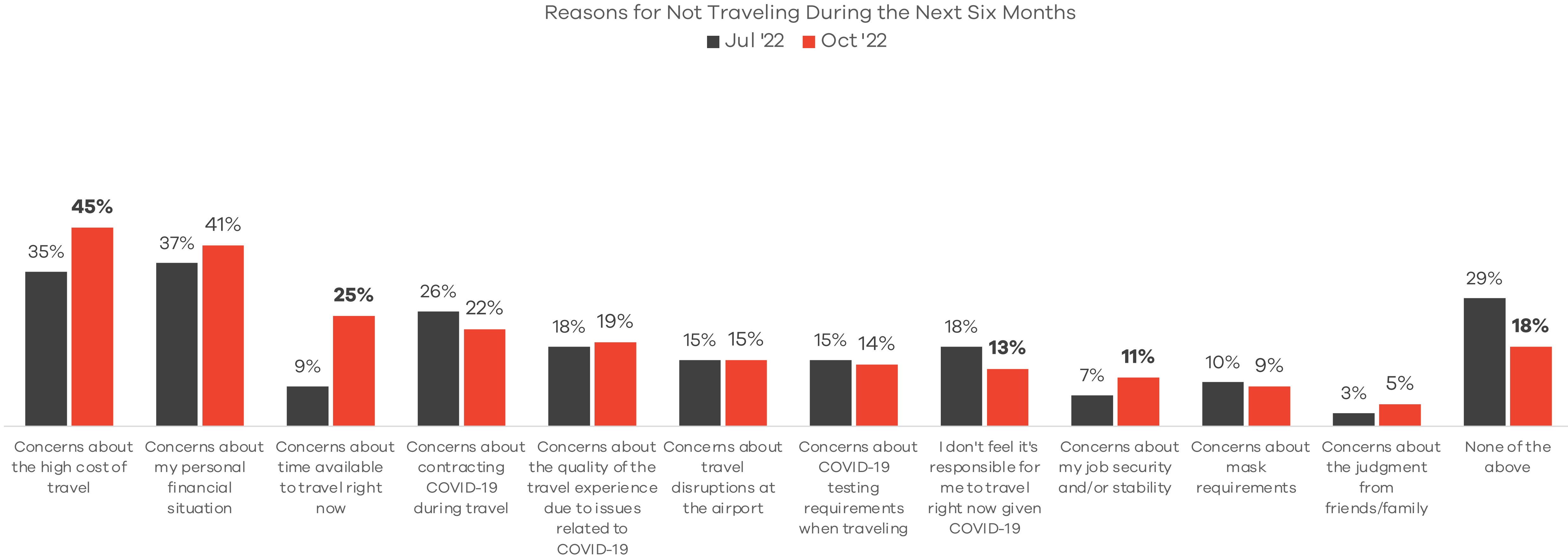
Travel Intentions Have Declined From One Year Ago While Short-Term Intentions Have Decreased Slightly From Last Quarter.

Sum of Next 6 Months
Oct 2021: 71%
Oct 2022: 58%



Base: U.S. adults (n=4,529)
Source: MMGY Global's 2022 *Portrait of American Travelers®* "Winter Edition"

Concerns About the High Cost of Travel, Personal Finances and Time Available to Travel Have All Increased Significantly From Just Three Months Ago.



Data in bold indicates a statistically significant difference from July 2022.

Base: Active leisure travelers without travel plans during the next six months (n=701)

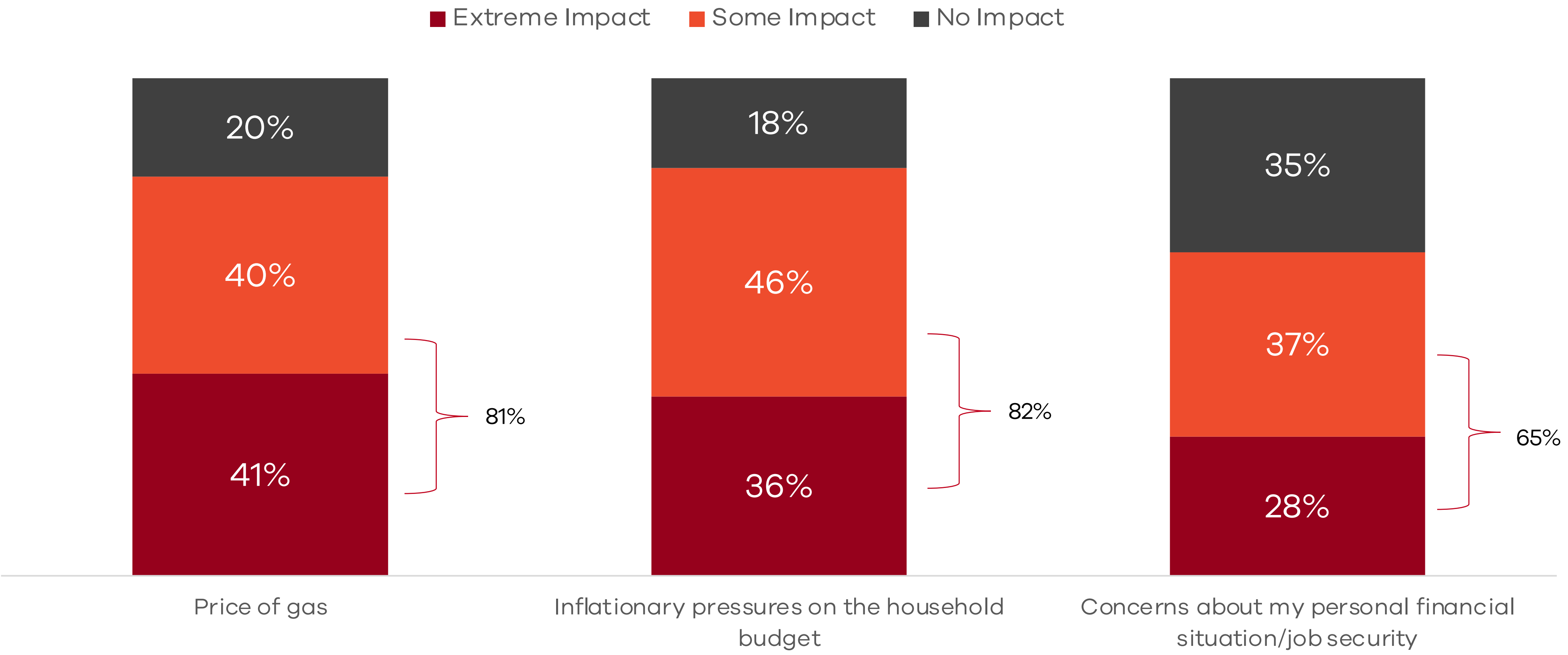
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Financial Factors Are Having an Impact on the Travel Plans of Active Leisure Travelers.

/ The price of gas and inflationary pressures on the household budget have at least some impact on the travel plans of 8 in 10 active leisure travelers, while two-thirds is somewhat impacted by personal financial concerns.

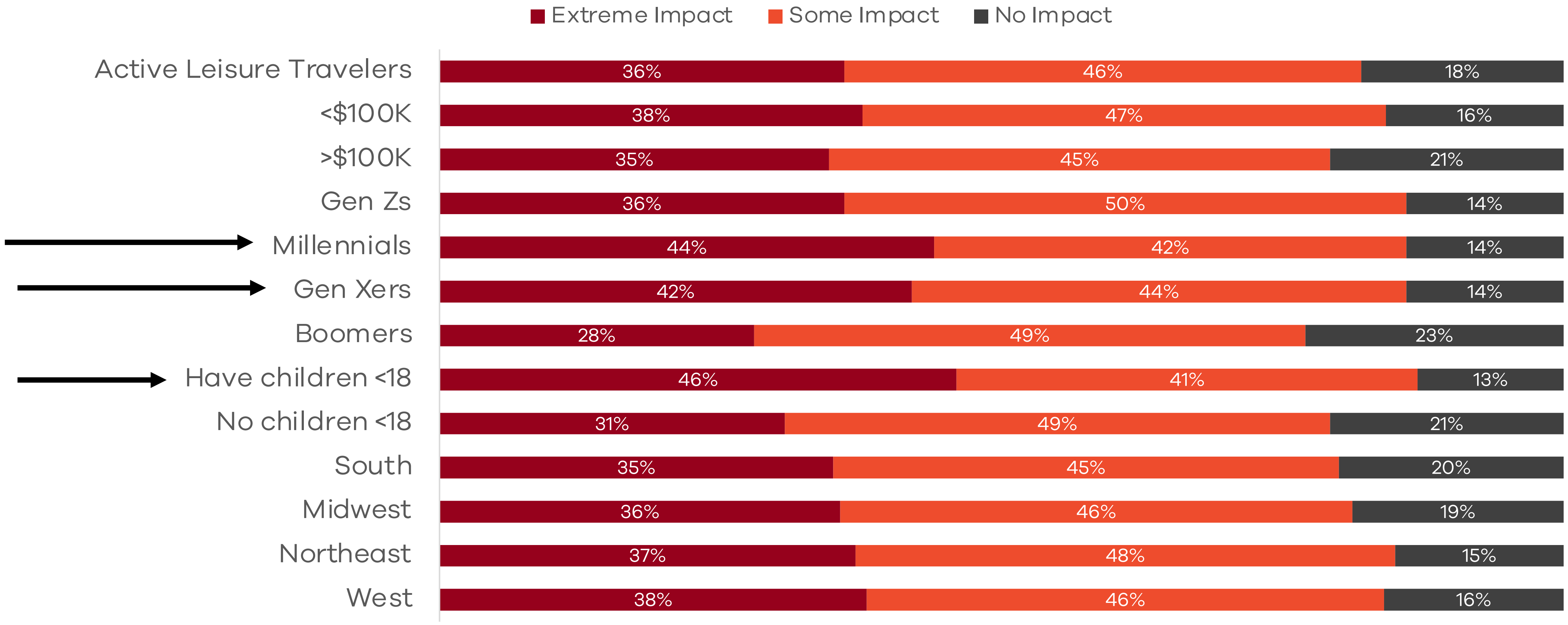
Financial Impacts on Leisure Travel in Next 6 Months



Base: Active leisure travelers (n=3,338)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

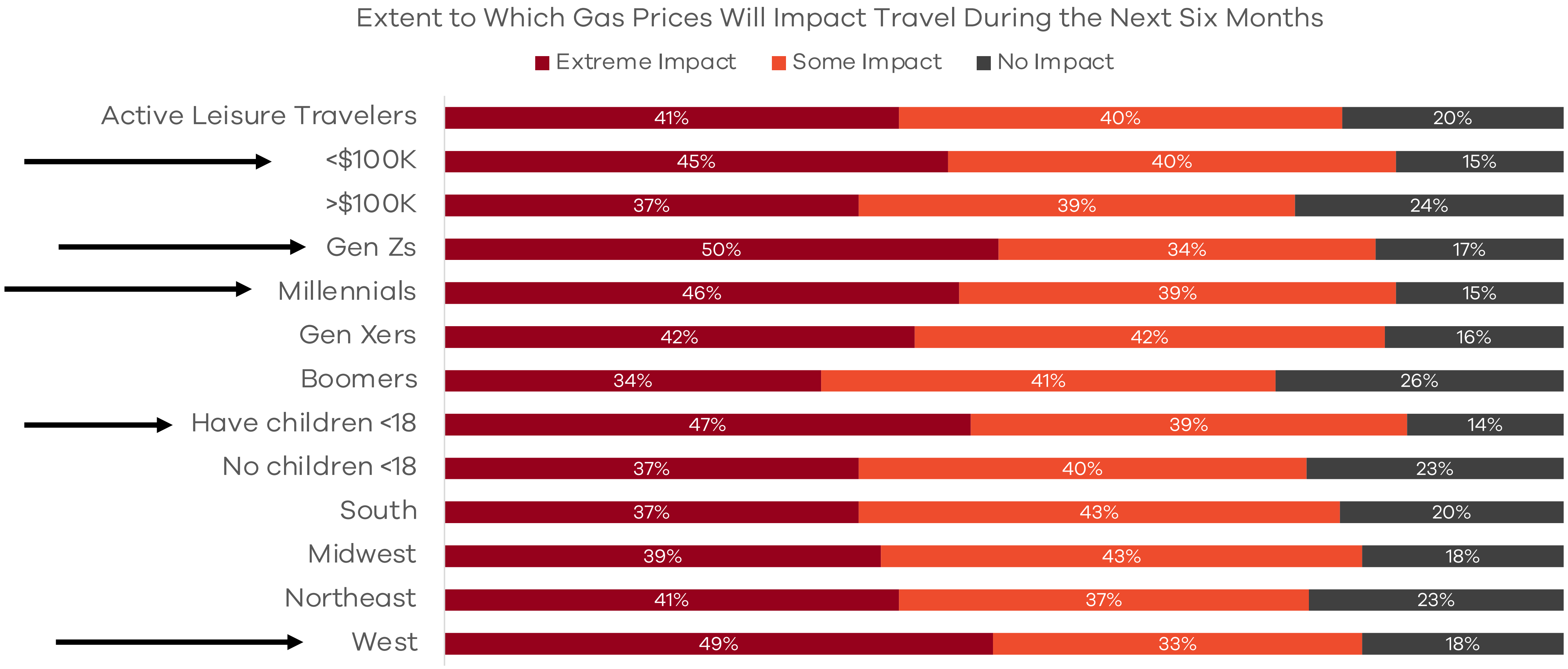
Inflationary Pressures Are More Likely to Have an Extreme Impact on Millennials, Gen Xers and Families.

Extent to Which Inflationary Pressures Will Impact Travel During the Next Six Months



Base: Active leisure travelers (n=3,338)
Source: MMGY Global's 2022 *Portrait of American Travelers®* "Winter Edition"

Gas Prices Are More Likely to Have an Extreme Impact on Lower-Income Travelers, Gen Zs, Millennials, Families and Travelers From the Western U.S.



Base: Active leisure travelers (n=3,338)
Source: MMGY Global's 2022 *Portrait of American Travelers®* "Winter Edition"

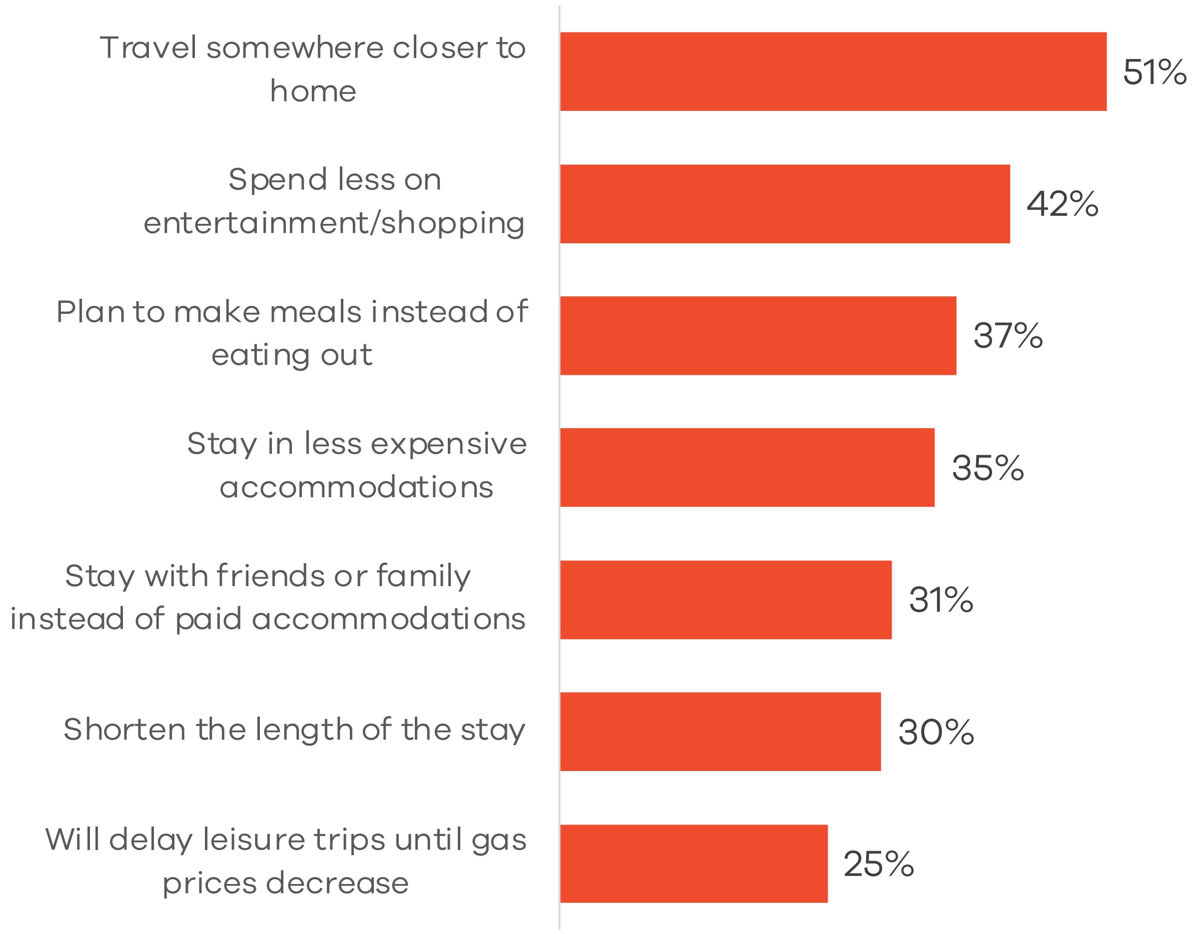
MMGY Travel Intelligence

Rising Gas Prices Are More Likely to Impact How People Travel and Spend Than If They Travel

Base: Active leisure travelers who say gas prices will impact travel (n=2,830)
Source: MMGY Global's 2022 *Portrait of American Travelers®* "Winter Edition"

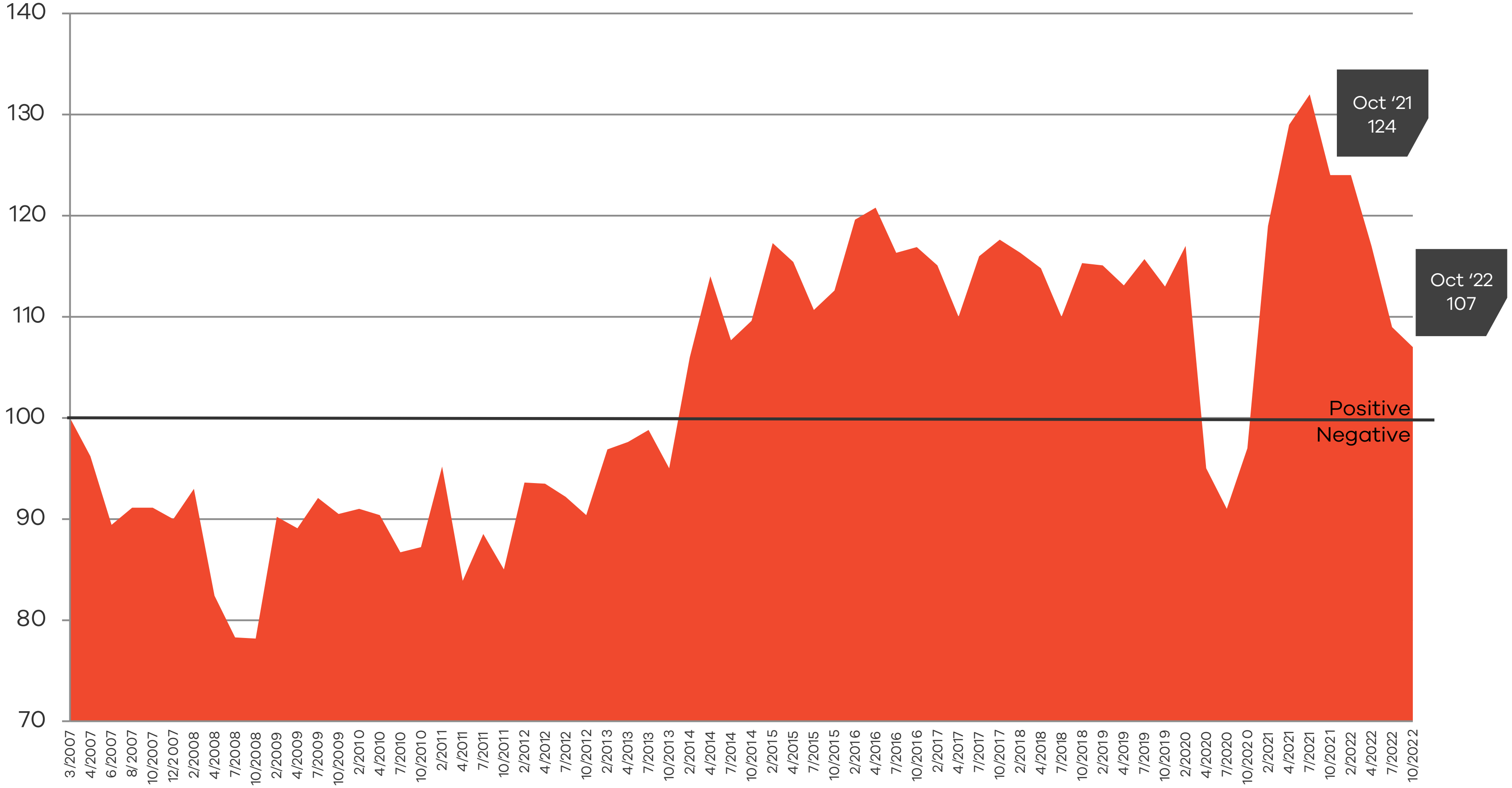
Travel Behavior Due to Gas Prices

(Among those who indicate gas prices will have an impact)



MMGY Travel Intelligence

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



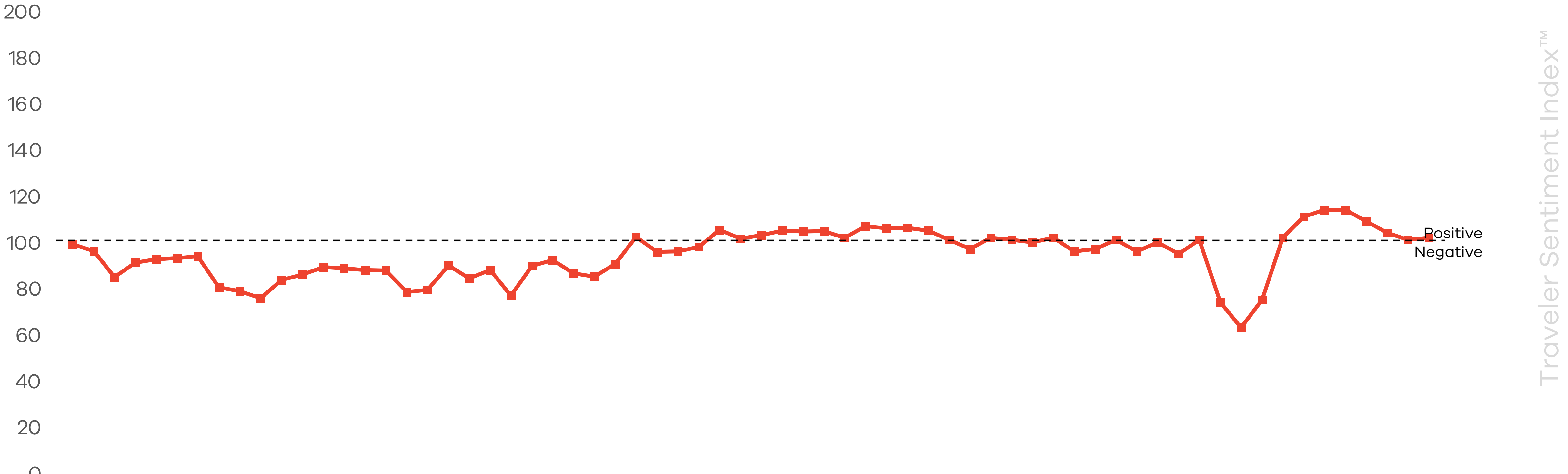
The Traveler Sentiment Index™ (TSI) consists of six variables, including: interest in travel, time available for travel, personal finances available for travel, affordability of travel, quality of service and safety of travel. It provides a glimpse into how U.S. adults are feeling about travel this year 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.

Traveler Sentiment Index™

Base: U.S. adults (n=4,529)
Source: MMGY Global's *travelhorizons*™/2022 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

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
U.S. Adults	100	97	86	92	94	94	95	82	80	77	85	87	90	90	89	89	80

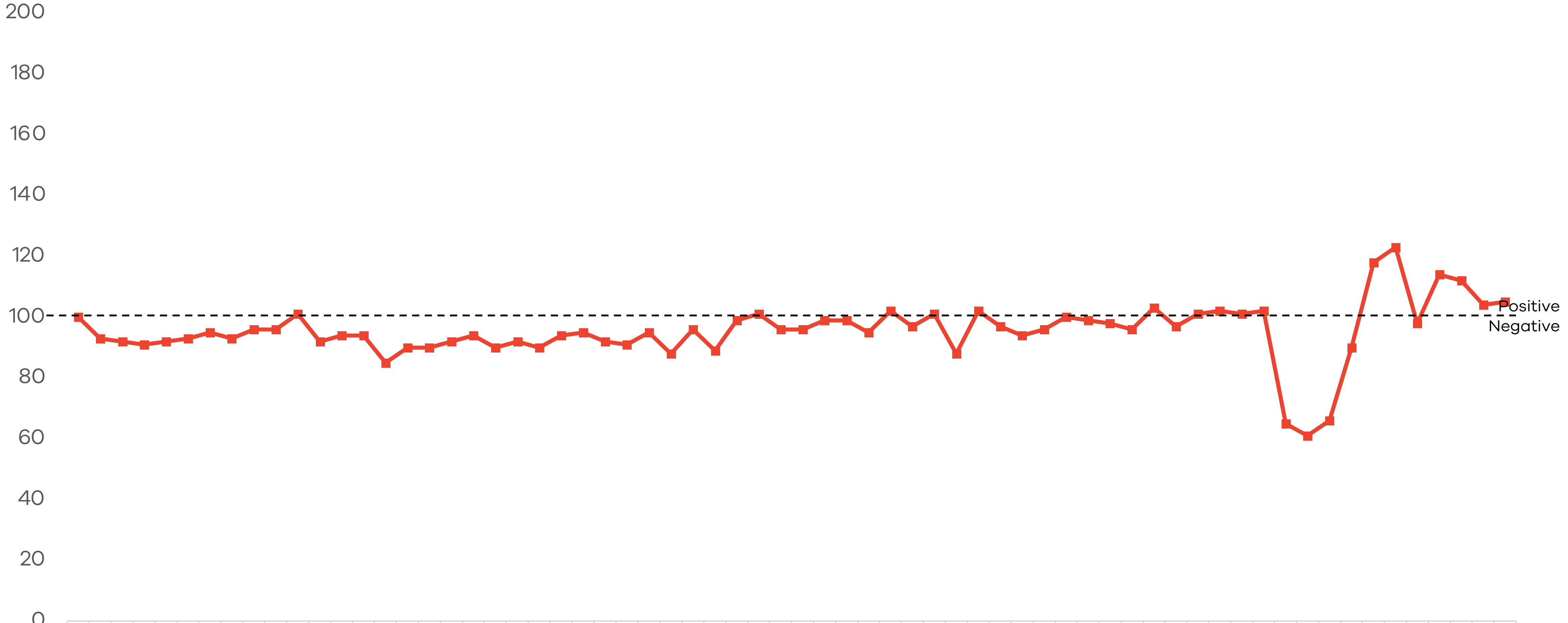
	Oct 10	Feb 11	Apr 11	Jul 11	Oct 11	Feb 12	Apr 12	Jul 12	Oct 12	Feb 13	Apr 13	Jul 13	Oct 13	Feb 14	Apr 14	Jul 14	Oct 14
U.S. Adults	80	91	85	89	78	91	93	88	86	92	103	97	97	99	106	103	104

	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	Jul 18	Oct 18
U.S. Adults	106	106	106	103	108	107	107	106	102	98	103	102	101	103	97	98

	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	Oct 22
U.S. Adults	102	97	101	96	102	75	64	76	103	112	115	115	110	105	102	103

Source: MMGY Global's 2022 *Portrait of American Travelers®* "Winter 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	Oct 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	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	94	95	92	91	95	88	96	89	99	101	96	96	99	99	95	102	97	101	88	102	97	94

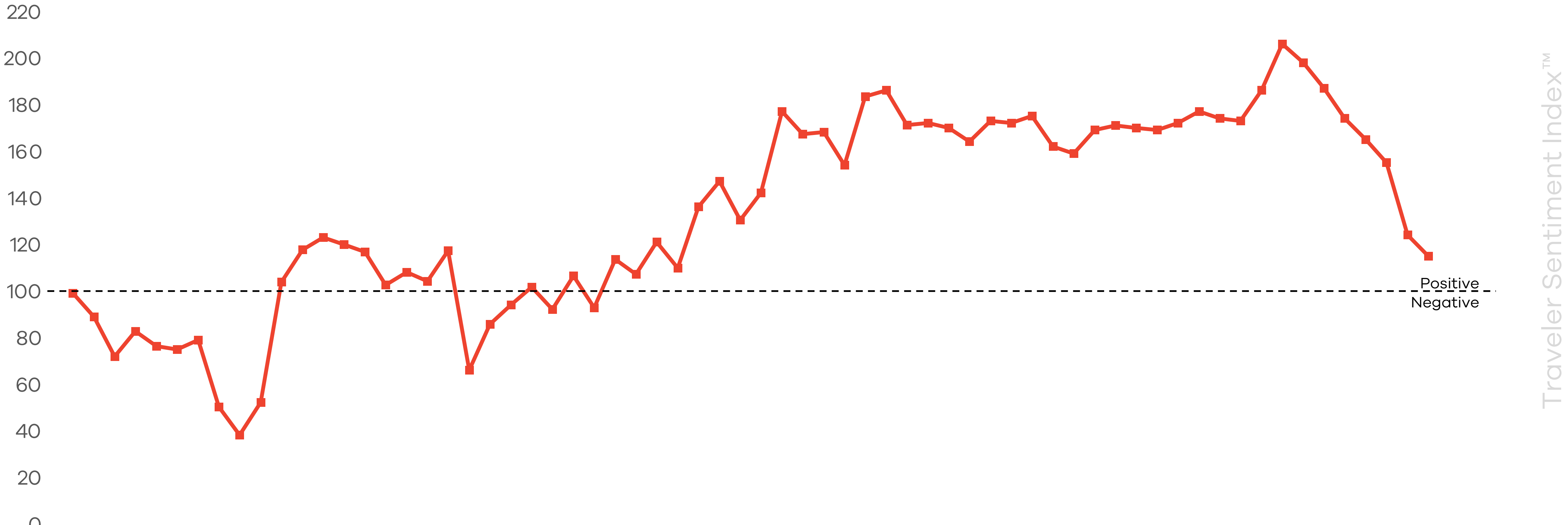
	Jul 17	Oct 17	Feb 18	Apr 18	Jul 18	Oct 18	Feb 19	Apr 19	Jul 19	Oct 19	Feb 20	Apr 20	Jul 20	Oct 20	Feb 21	Apr 21	Jul 21	Oct 21	Feb 22	Apr 22	Jul 22	Oct 22
U.S. Adults	96	100	99	98	96	103	97	101	102	101	102	65	61	66	90	118	123	98	114	112	104	105

Traveler Sentiment Index™

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

MMGY Travel Intelligence

Index 3: Perceived Affordability of Travel



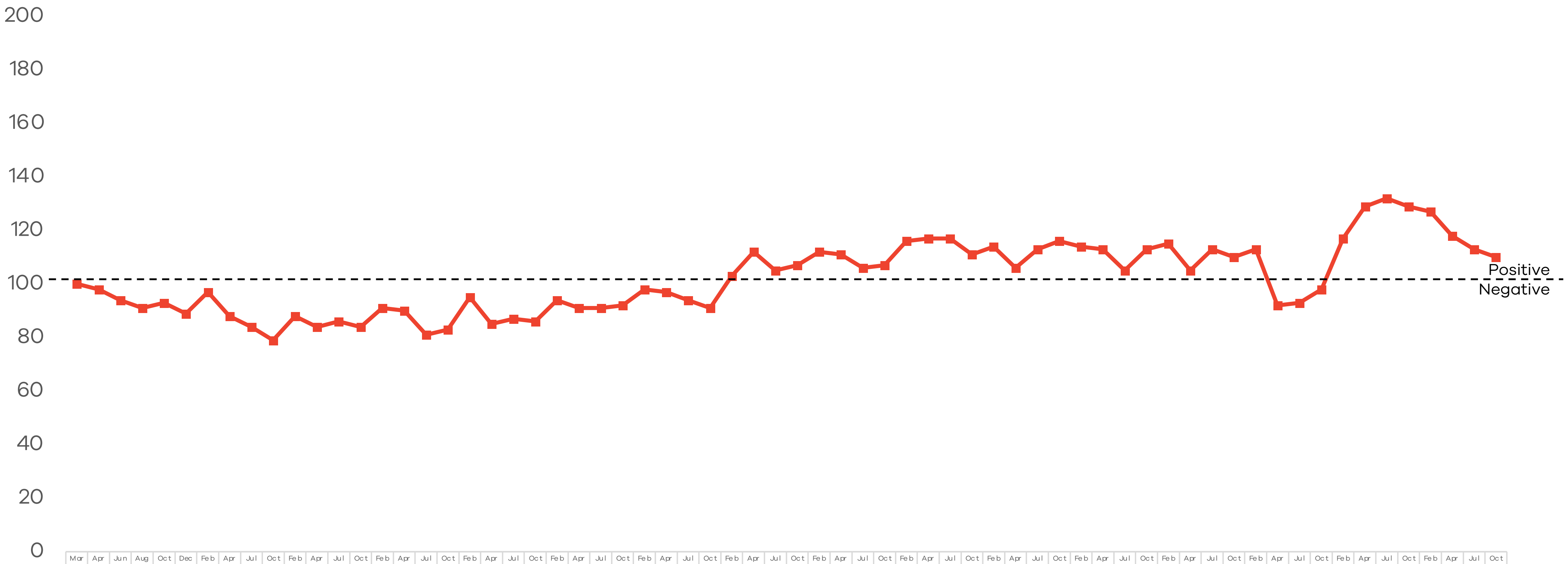
	Mar 07	Apr 07	Jun 07	Aug 07	Oct 07	Dec 07	Feb 08	Apr 08	Jul 08	Oct 08	Feb 09	Apr 09	Jul 09	Oct 09	Feb 10	Apr 10	Jul 10	Oct 10	Feb 11	Apr 11	Jul 11
U.S. Adults	100	90	73	84	77	76	80	51	39	53	105	119	124	121	118	104	109	105	118	67	87

	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	95	103	93	107	94	115	108	122	111	137	148	131	143	178	168	169	155	184	187	172	173

	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	Oct 22
U.S. Adults	171	165	174	173	176	163	160	170	172	171	170	173	178	175	174	187	207	199	188	175	166	156	125	116

Source: MMGY Global's 2022 *Portrait of American Travelers®* "Winter 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	Jul 10	Oct 10	Feb 11	Apr 11	Jul 11	Oct 11
U.S. Adults	100	98	94	91	93	89	97	88	84	79	88	84	86	84	91	90	81	83	95	85	87	86

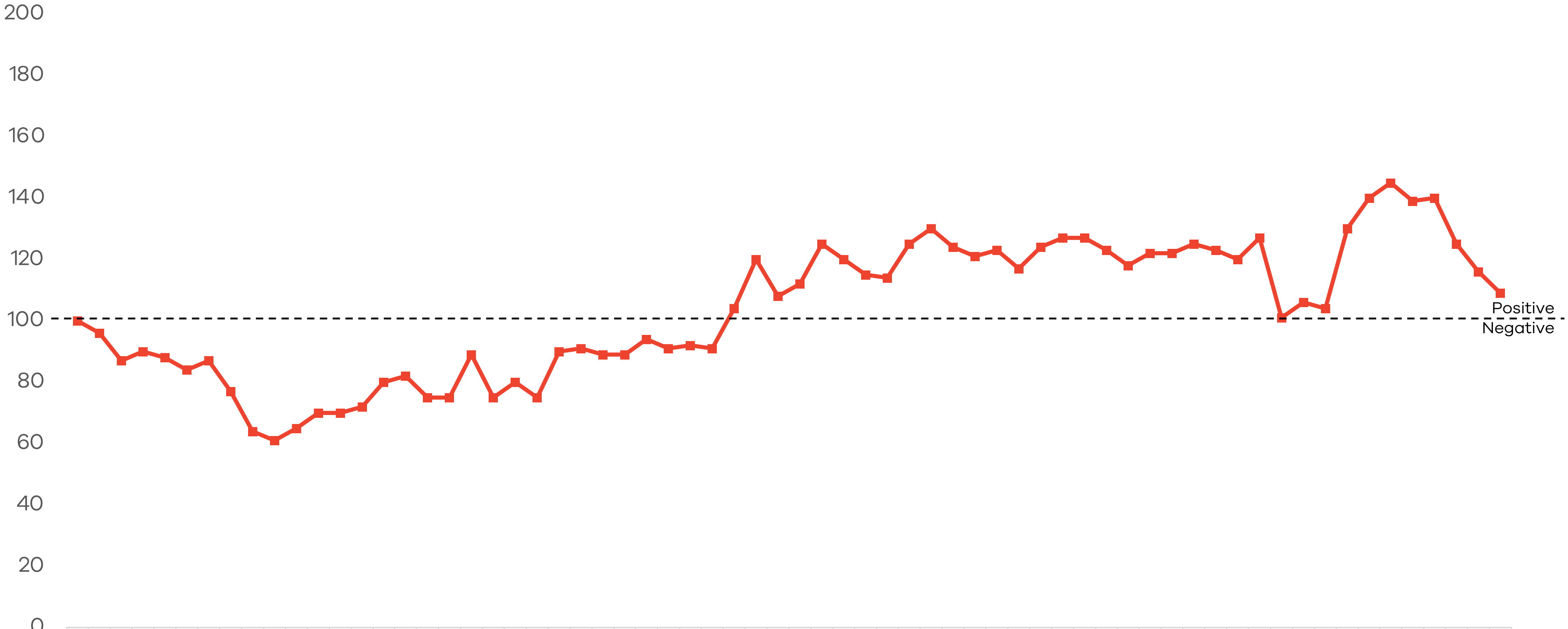
	Feb 12	Apr 12	Jul 12	Oct 12	Feb 13	Apr 13	Jul 13	Oct 13	Feb 14	Apr 14	Jul 14	Oct 14	Feb 15	Apr 15	Jul 15	Oct 15	Feb 16	Apr 16	Jul 16	Oct 16	Feb 17	Apr 17
U.S. Adults	94	91	91	92	98	97	94	91	103	112	105	107	112	111	106	107	116	117	117	111	114	106

	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 0	Feb 21	Apr 21	Jul 21	Oct 21	Feb 22	Apr 22	Jul 22	Oct 22
U.S. Adults	113	116	114	113	105	113	115	105	113	110	113	92	93	98	117	129	132	129	127	118	113	110

Traveler Sentiment Index™

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

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	Oct 09	Feb 10	Apr 10	Jul 10	Oct 10	Feb 11	Apr 11	Jul 11	Oct 11
U.S. Adults	100	96	87	90	88	84	87	77	64	61	65	70	70	72	80	82	75	75	89	75	80	75

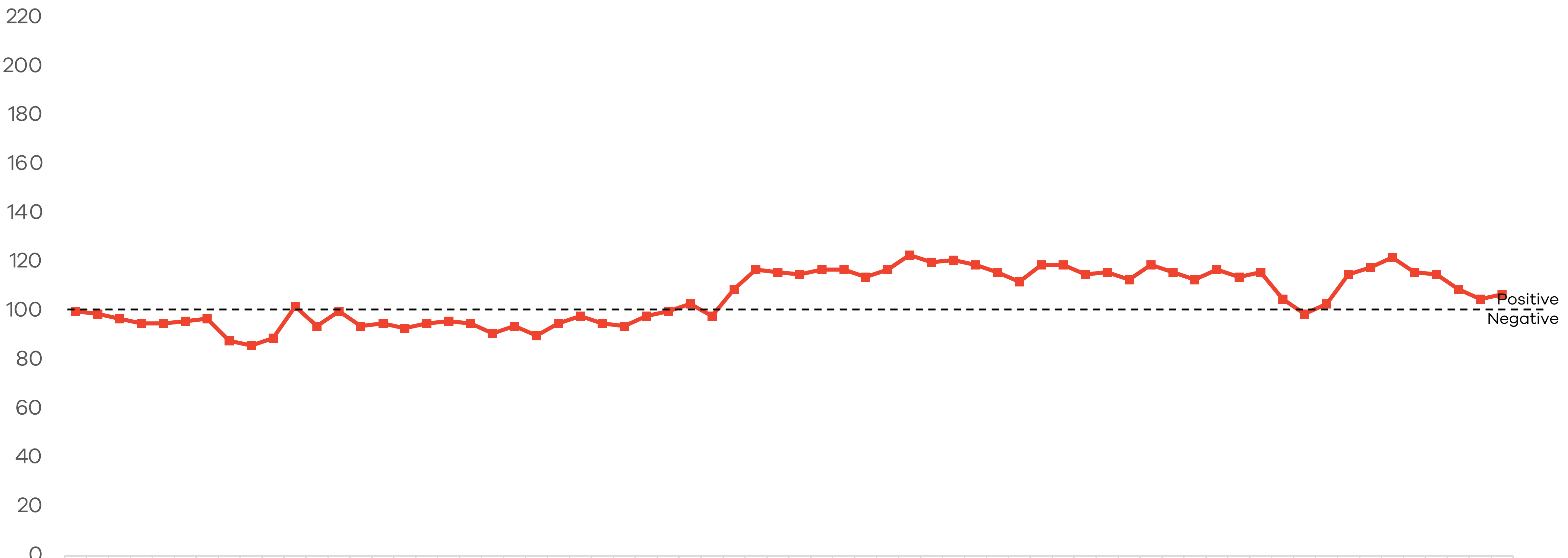
	Feb 12	Apr 12	Jul 12	Oct 12	Feb 13	Apr 13	Jul 13	Oct 13	Feb 14	Apr 14	Jul 14	Oct 14	Feb 15	Apr 15	Jul 15	Oct 15	Feb 16	Apr 16	Jul 16	Oct 16	Feb 17	Apr 17
U.S. Adults	90	91	89	89	94	91	92	91	104	120	108	112	125	120	115	114	125	130	124	121	123	117

	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	Oct 22
U.S. Adults	124	127	127	123	118	122	122	125	123	120	127	101	106	104	130	140	145	139	140	125	116	109

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

MMGY Travel Intelligence

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

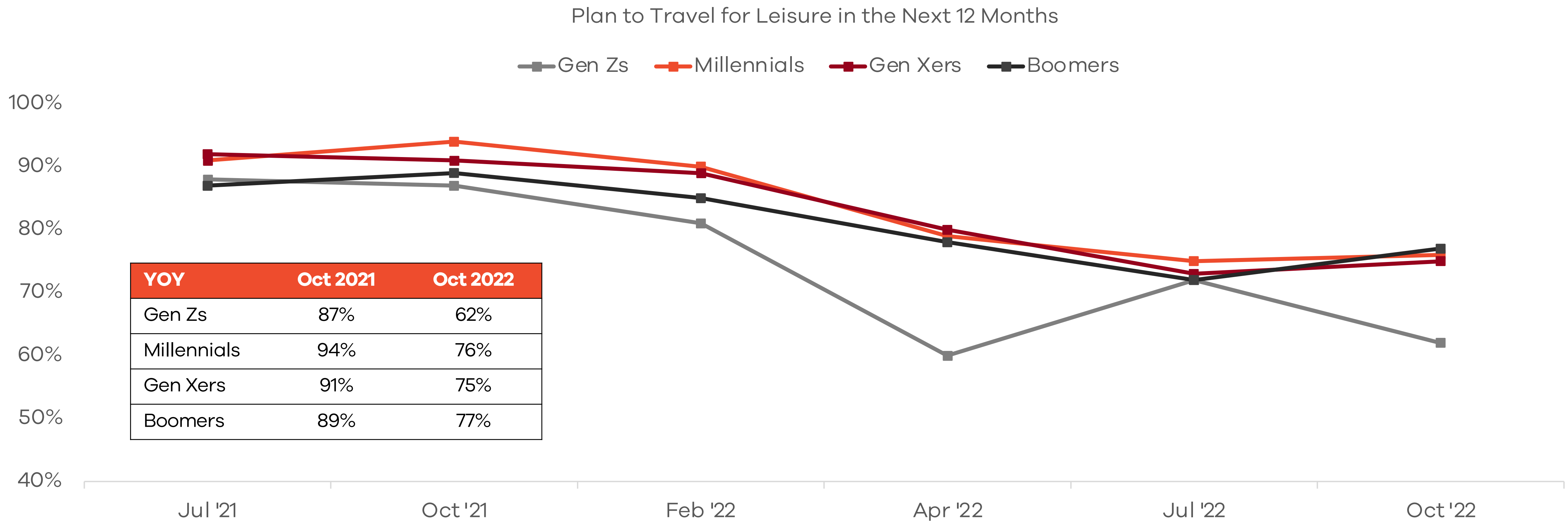
	Feb 12	Apr 12	Jul 12	Oct 12	Feb 13	Apr 13	Jul 13	Oct 13	Feb 14	Apr 14	Jul 14	Oct 14	Feb 15	Apr 15	Jul 15	Oct 15	Feb 16	Apr 16	Jul 16	Oct 16
U.S. Adults	95	98	95	94	98	100	103	98	109	117	116	115	117	117	114	117	123	120	121	119

	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	Oct 22
U.S. Adults	116	112	119	119	115	116	113	119	116	113	117	114	116	105	99	103	115	118	122	116	115	109	105	107

Traveler Sentiment Index™

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

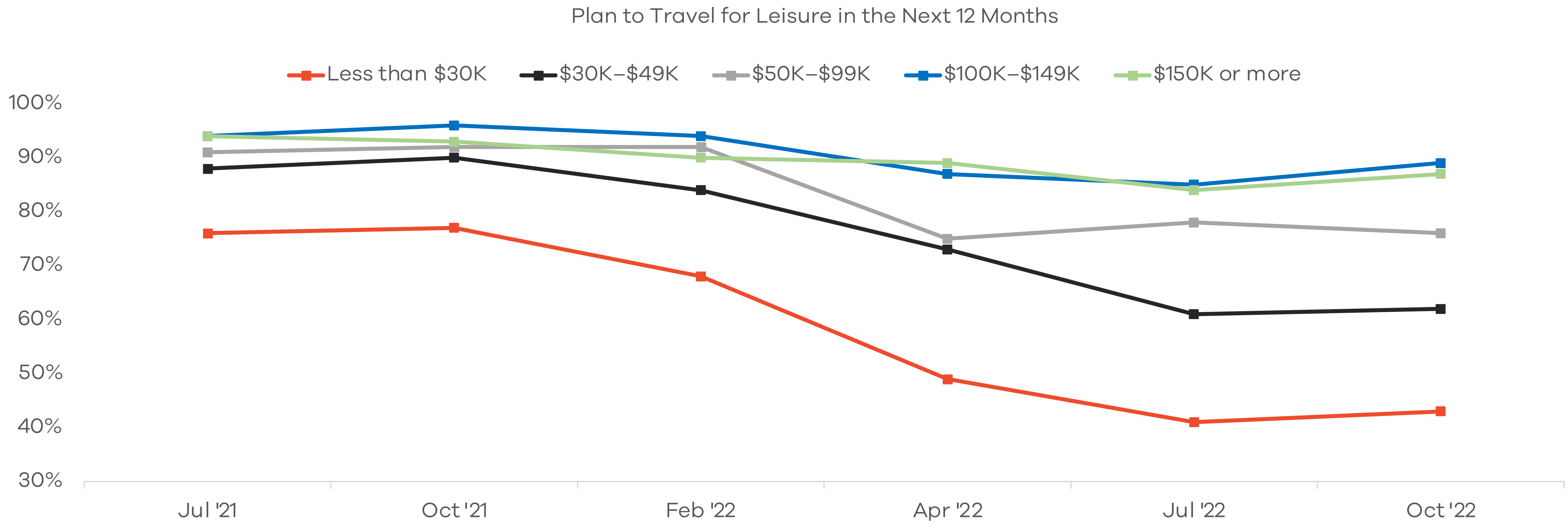
All Generations Are Experiencing a Decline in Travel Intentions From One Year Ago, But Gen Zs Displayed the Only Decline From Last Quarter.



YOY	Oct 2021	Oct 2022
Gen Zs	87%	62%
Millennials	94%	76%
Gen Xers	91%	75%
Boomers	89%	77%

Base: U.S. adults (Gen Zs: n=593; Millennials: n=1,282; Gen Xers: n=1,097; Boomers: n=1,364)
Source: MMGY Global's 2022 *Portrait of American Travelers®* "Winter Edition"

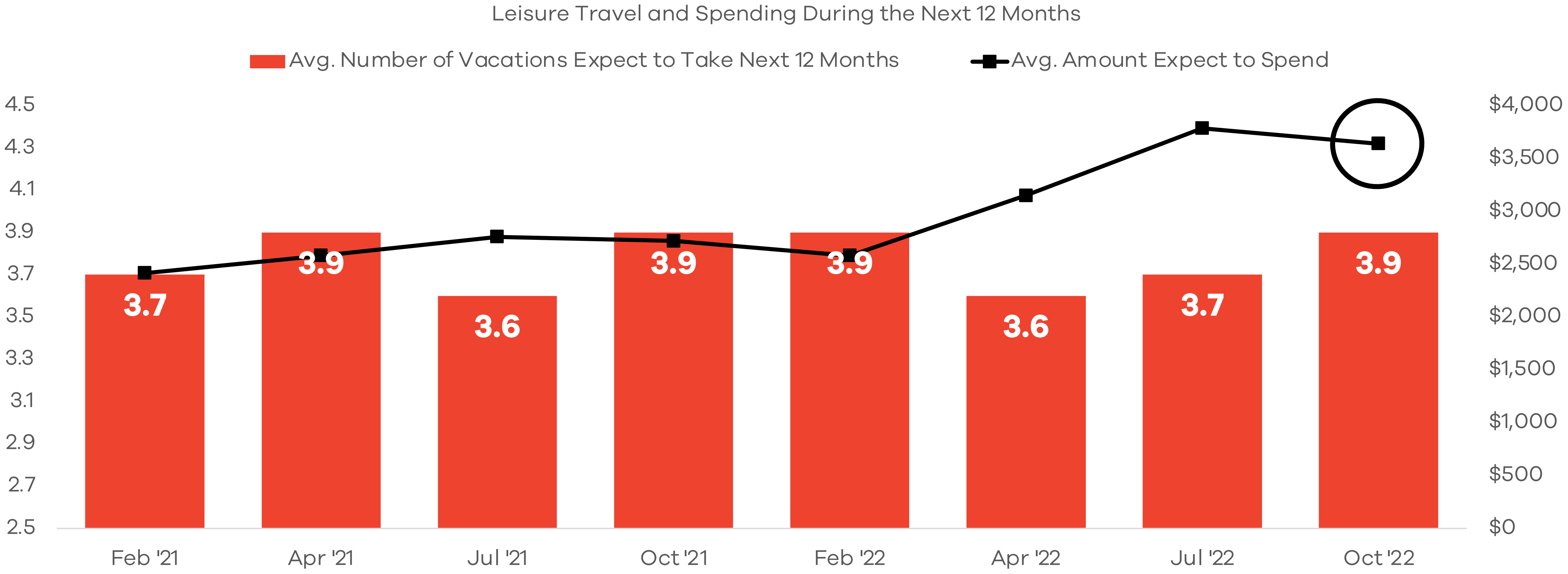
Travel Intentions of Lower-Income Households Display the Largest Decrease From Last Year.



Base: U.S. adults (<$30K: n=726; $30K–$49K: n=626; $50K–$99K: n=1,336; $100K–$149K: n=811; $150K+: n=1,030)
Source: MMGY Global's 2022 *Portrait of American Travelers®* "Winter Edition"

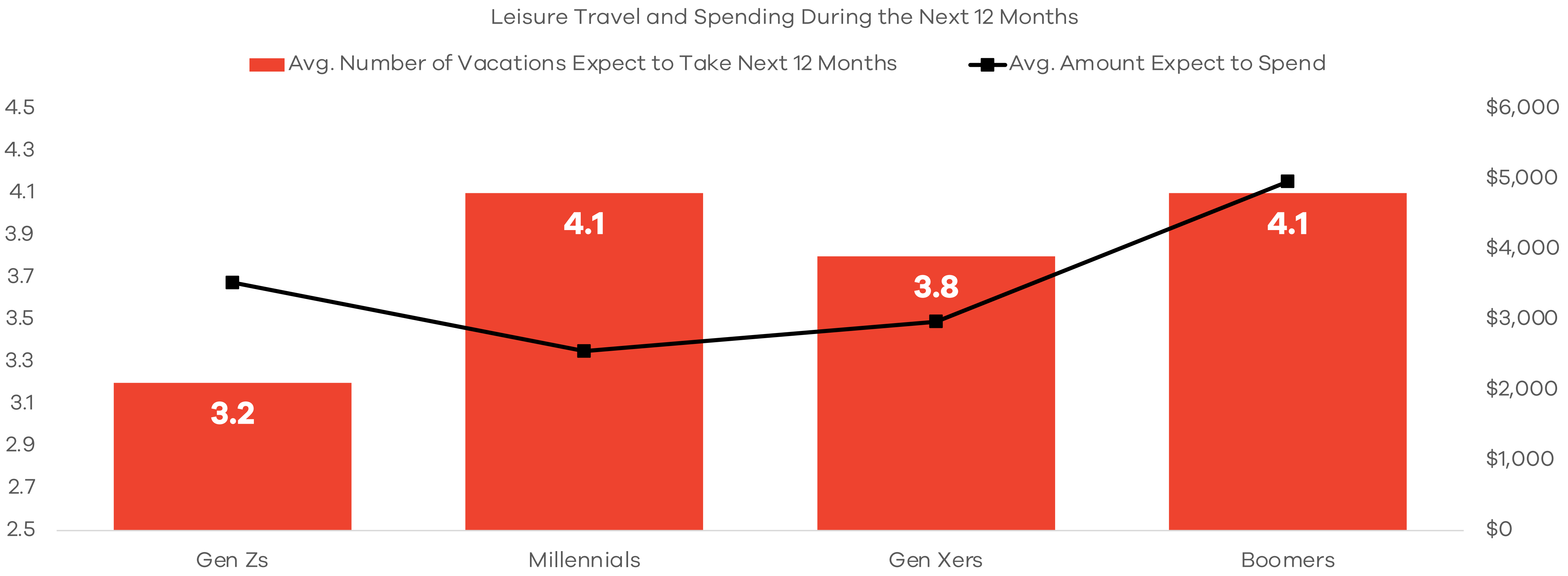
MMGY Travel Intelligence

Among Those Who Do Plan to Travel in the Next 12 Months, Travel Spending Intentions Have Decreased Slightly From "Fall Edition," While Intended Number of Trips Increased.



Base: Active leisure travelers (n=3,338)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

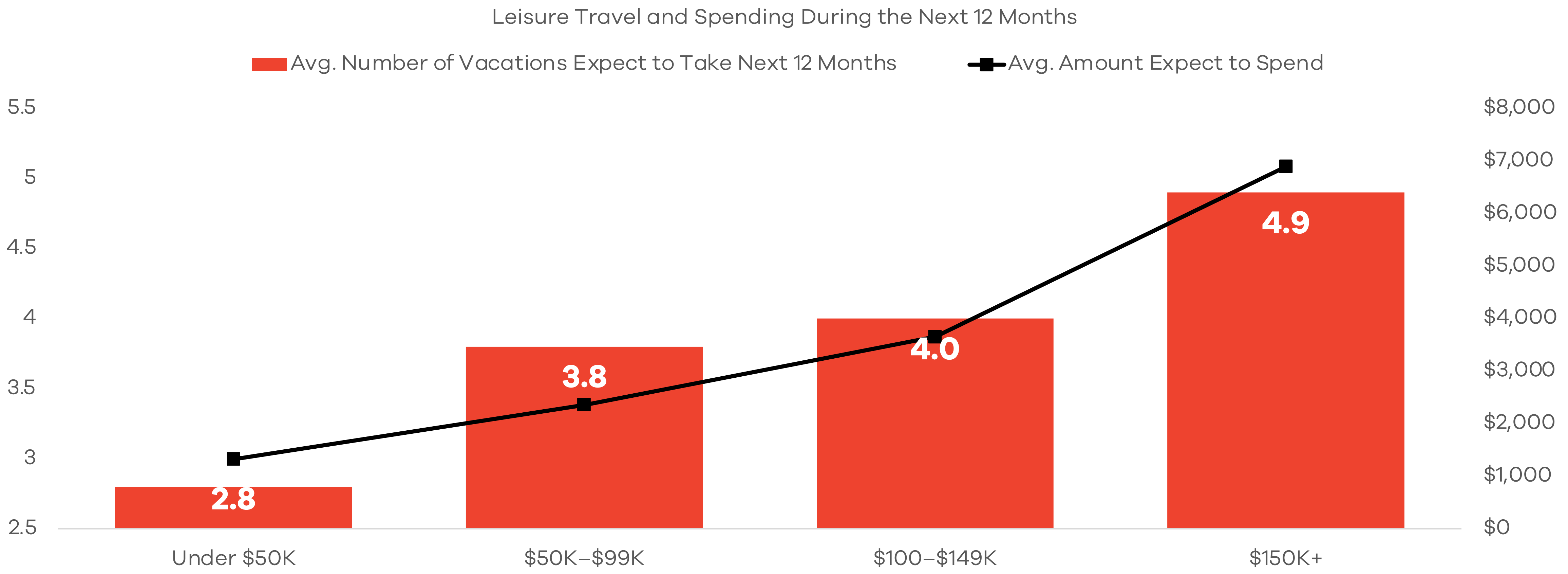
Boomers Expect to Spend the Most on Leisure Travel During the Next 12 Months.



Base: Active leisure travelers (Gen Zs: n=368; Millennials: n=977; Gen Xers: n=819; Boomers: n=1,043)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

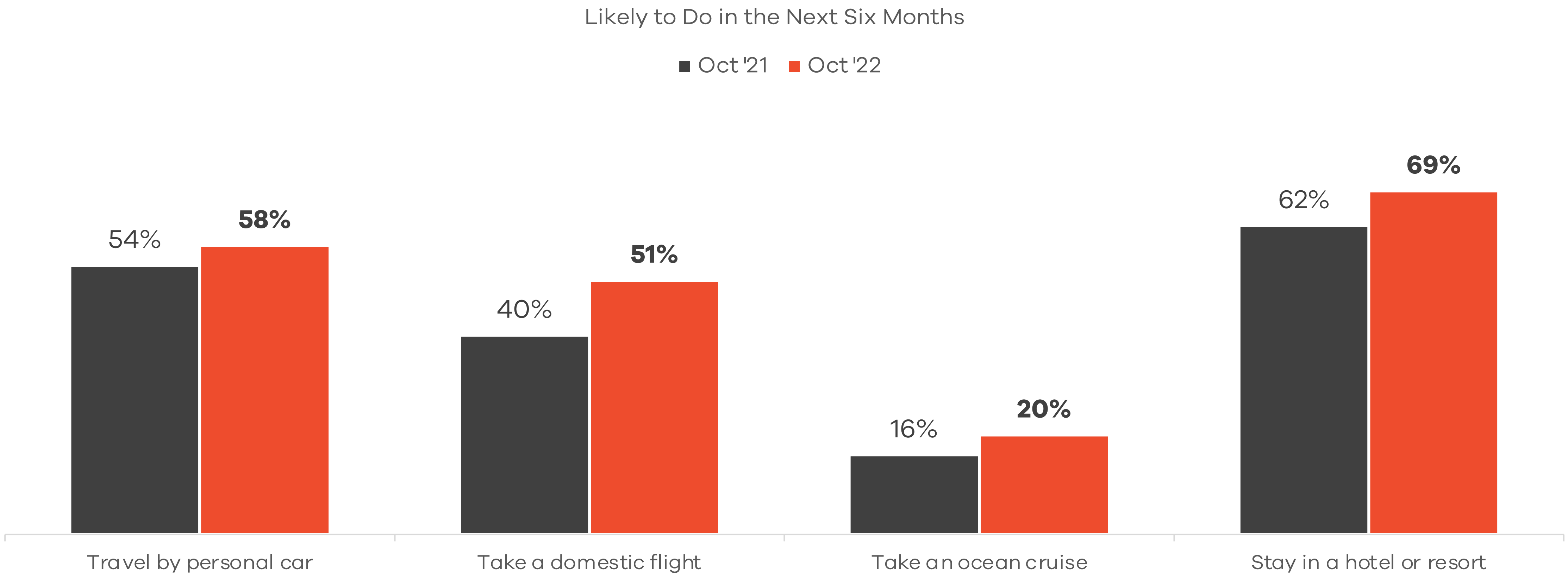
Travel Intentions and Spending Intentions Increase With Household Income.



Base: Active leisure travelers (Gen Zs: n=368; Millennials: n=977; Gen Xers: n=819; Boomers: n=1,043)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Likelihood to Travel by Personal Car, Take a Flight, Take a Cruise, and Stay in a Hotel or Resort Have All 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 (n=2,637)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

TRAVEL OUTLOOK SUMMARY

KEY TAKEAWAY:

- Continuing the trend we saw since summer, the affordability of travel and personal finances are top of mind for U.S. adults when planning travel. Six in 10 U.S. adults plan to take a vacation in the next six months (58%), which is down slightly from the percentage planning to do so last quarter (63%) and down significantly from those planning to do so this time last year (71%). Among those not planning to vacation in the next six months, more than 4 in 10 aren't doing so because of concerns about the high cost of travel (45%) and their financial situation (41%). Time available is another concern for these travelers, with significantly more indicating they aren't planning to travel in the next six months because of concerns about time available to travel right now (up from 9% in July to 25% in October). Although fewer people intend to travel, those who do plan to take a similar number of trips (3.9 trips) as they reported last year (3.9 trips) and plan to spend more on these trips ($3,639, up from $2,719 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:

- We're starting to see the travel planning window lengthen with a similar number of U.S. adults planning to travel in the next 12 months but fewer planning to travel in the next six months compared to last quarter. This may be due to concerns about inflation, rising costs of travel or time available for travel, as we're seeing these top of mind for travelers and those who aren't planning to travel in the next six months. Despite this decrease in short-term travel intentions, active leisure travelers are planning to take a similar number of trips and plan to spend significantly more compared to last year, indicating a strong travel outlook for 2023.

Where People Want to Visit

States Interested in Visiting During the Next Two Years

Rank	Destination	% Interested	
1	Hawaii	66%	
2	Florida	62%	
3	California	56%	
3	Colorado	56%	▲
5	New York	52%	▲
5	Alaska	52%	
7	Texas	47%	
8	Nevada	45%	
9	Arizona	44%	▼
10	Washington	41%	
11	North Carolina	40%	
11	Tennessee	40%	
11	Georgia	40%	
14	Maine	38%	
15	South Carolina	37%	▼
15	Montana	37%	
17	Massachusetts	35%	
18	Louisiana	34%	
18	Virginia	34%	
18	Oregon	34%	

Rank	Destination	% Interested	
21	New Mexico	33%	▼
21	Wyoming	33%	
23	Utah	32%	
24	Michigan	31%	
25	Pennsylvania	30%	▼
25	Vermont	30%	
27	Connecticut	29%	
28	New Jersey	28%	▼
28	Maryland	28%	
30	Rhode Island	26%	▼
30	New Hampshire	26%	▼
32	Wisconsin	25%	
32	West Virginia	25%	▼
32	Idaho	25%	
35	Alabama	24%	▼
35	Kentucky	24%	
35	Illinois	24%	▼
35	South Dakota	24%	▼
35	Minnesota	24%	
40	Ohio	23%	▼

Rank	Destination	% Interested	
41	North Dakota	22%	▼
41	Mississippi	22%	▼
41	Delaware	22%	▼
44	Missouri	21%	▼
45	Oklahoma	20%	▼
45	Arkansas	20%	▼
45	Nebraska	20%	▼
48	Indiana	19%	▼
49	Kansas	17%	▼
49	Iowa	17%	▼

▲ Displayed a statistically significant increase compared to winter 2021

▼ Displayed a statistically significant decrease compared to winter 2021

Base: Active leisure travelers (n=3,338)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

Destinations Interested in Visiting During the Next Two Years

Rank	Destination	% Interested	
1	Island of Hawai'i	60%	
1	Honolulu, HI	60%	▲
3	Maui, HI	58%	▲
4	Kaua'i, HI	56%	▲
5	Florida Keys/Key West, FL	54%	
5	Las Vegas, NV	54%	
7	Orlando, FL	50%	
7	New York City, NY	50%	
9	Tampa, FL	48%	
10	Miami, FL	47%	
10	San Diego, CA	47%	
10	New Orleans, LA	47%	
10	San Francisco, CA	47%	
14	Palm Beach, FL	45%	
15	Nashville, TN	44%	
15	Denver, CO	44%	▲
15	Niagara Falls, NY	44%	
15	Washington, D.C.	44%	
19	Los Angeles, CA	43%	
19	Napa Valley, CA	43%	
21	Myrtle Beach, SC	42%	▼
21	Fort Lauderdale, FL	42%	

Rank	Destination	% Interested	
23	Daytona Beach, FL	41%	
23	Palm Springs, CA	41%	
25	St. Petersburg/Clearwater, FL	40%	▼
25	Charleston, SC	40%	
25	Panama City Beach, FL	40%	
25	Phoenix/Scottsdale, AZ	40%	
25	Seattle, WA	40%	
30	Boston, MA	39%	
30	Hilton Head Island, SC	39%	
30	Outer Banks, NC	39%	
30	Austin, TX	39%	
34	Ft. Myers/Sanibel/Captiva, FL	37%	▼
34	Savannah, GA	37%	▼
34	St. Augustine, FL	37%	▼
34	San Antonio, TX	37%	
34	Dallas, TX	37%	
39	Charlotte, NC	36%	
40	Gatlinburg/Pigeon Forge, TN	35%	▼
40	Virginia Beach, VA	35%	
42	Atlanta, GA	34%	
42	Houston, TX	34%	▼
44	Chicago, IL	33%	

Rank	Destination	% Interested	
44	Sonoma County, CA	33%	
44	Portland, OR	33%	
44	Tucson, AZ	33%	
48	Anaheim, CA	32%	▼
49	Asheville, NC	31%	▼
49	Philadelphia, PA	31%	
49	Salt Lake City, UT	31%	
49	Raleigh/Durham, NC	31%	
49	Vail, CO	31%	
54	Corpus Christi, TX	28%	▼
55	Wilmington, NC	27%	
56	Branson, MO	26%	▼
56	Winston-Salem, NC	26%	
58	Minneapolis, MN	24%	
59	St. Louis, MO	23%	▼
59	Ann Arbor, MI	23%	▼
61	Kansas City, MO	22%	▼
62	Cleveland, OH	21%	▼
62	Detroit, MI	21%	

Base: Active leisure travelers (n=3,338)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Top 10 Destinations of Interest by Generation

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

Gen Zs	
1	San Francisco, CA
1	Miami, FL
3	New York City, NY
3	San Diego, CA
5	Los Angeles, CA
5	Niagara Falls, NY
7	Orlando, FL
8	Washington, D.C.
9	Tampa, FL
9	Island of Hawai'i
9	Maui, HI
9	Kaua'i, HI

Millennials	
1	Island of Hawai'i
2	Honolulu, HI
3	Maui, HI
4	Orlando, FL
5	Las Vegas, NV
6	New York City, NY
6	Miami, FL
8	New Orleans, LA
9	Los Angeles, CA
9	Florida Keys/Key West, FL
9	Kaua'i, HI

Gen Xers	
1	Honolulu, HI
2	Island of Hawai'i
2	Maui, HI
4	Kaua'i, HI
5	Florida Keys/Key West, FL
6	Las Vegas, NV
7	New York City, NY
8	Orlando, FL
9	San Francisco, CA
10	New Orleans, LA
10	San Diego, CA

Boomers	
1	Island of Hawai'i
2	Honolulu, HI
3	Maui, HI
4	Kaua'i, HI
5	Florida Keys/Key West, FL
5	Las Vegas, NV
7	Tampa, FL
8	Nashville, TN
8	New York City, NY
8	Orlando, FL

Base: Active leisure travelers (Gen Zs: n=368; Millennials: n=977; Gen Xers: n=819; Boomers: n=1,043)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

Online Travel Agencies

Winter Module

Online Travel Agency Usage

74% 2021 **75%** 2022

of active leisure travelers visit at least one OTA website or app on a regular basis when researching or booking travel.

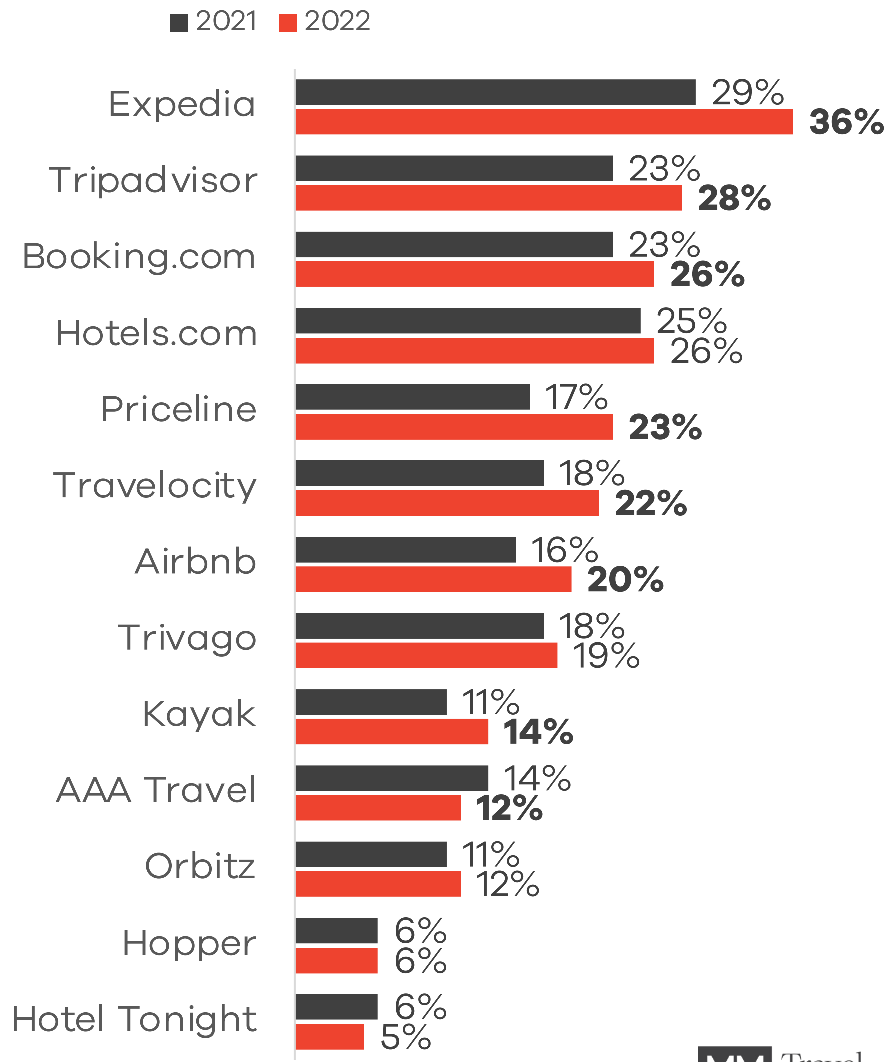
/ More younger travelers and travelers with kids visit OTAs when researching and booking travel.

Gen Zs: 82%
Millennials: 86%
Gen Xers: 81%
Boomers: 62%

Have Kids: 90%
Don't Have Kids: 67%

Less Than $100K: 76%
More Than $100K: 75%

OTAs Visited When Researching or Booking Travel

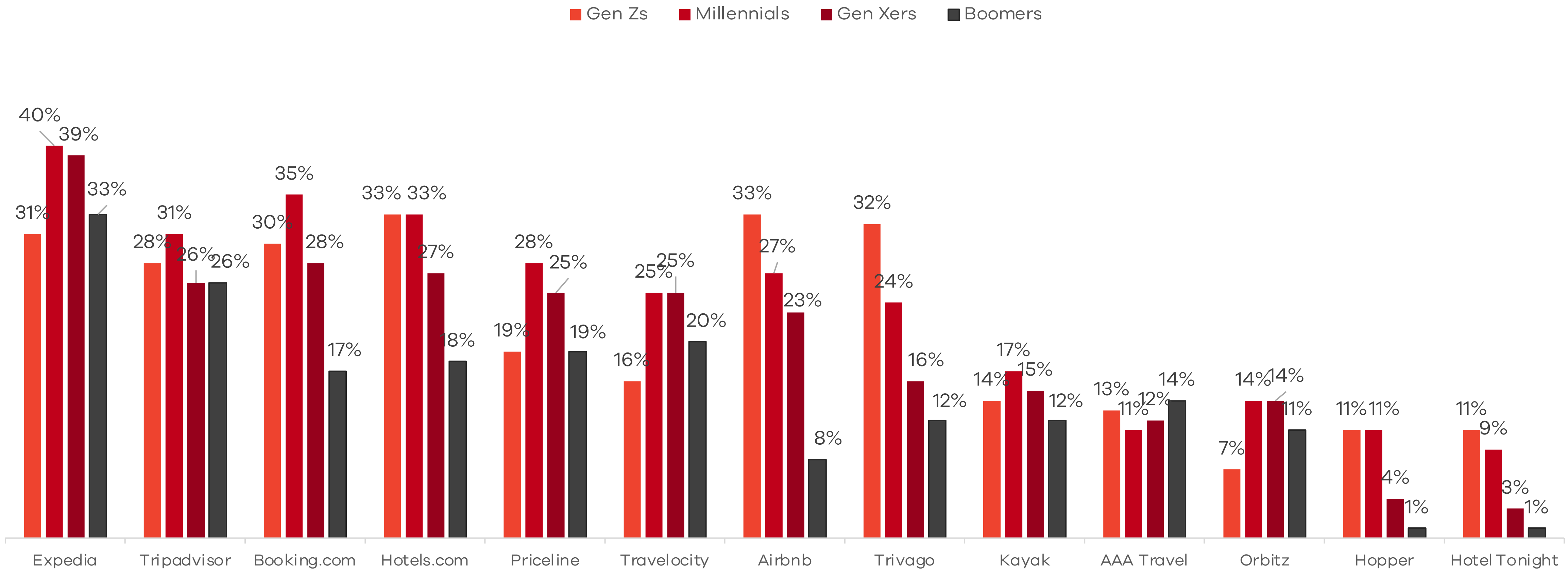


Data in bold indicates a statistically significant difference from 2021.
Base: Active leisure travelers (n=3,338)
Source: MMGY Global's 2022 *Portrait of American Travelers®* "Winter Edition"

MMGY Travel Intelligence

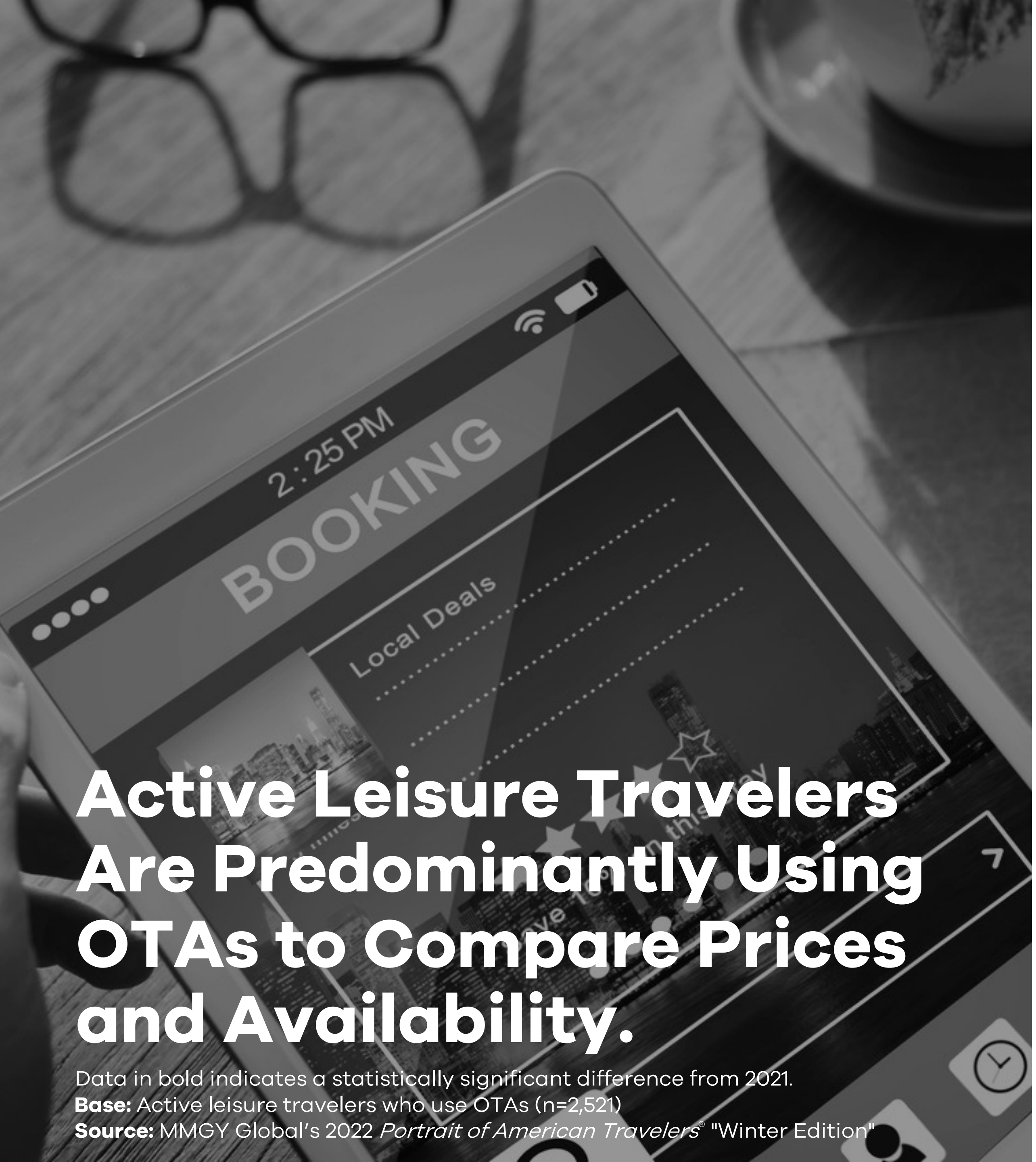
Online Travel Agency Usage by Generation

/ Younger generations are much more likely than older generations to use Hotels.com, Airbnb and Trivago.



Base: Active leisure travelers (Gen Zs: n=368; Millennials: n=977; Gen Xers: n=819; Boomers: n=1,043)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

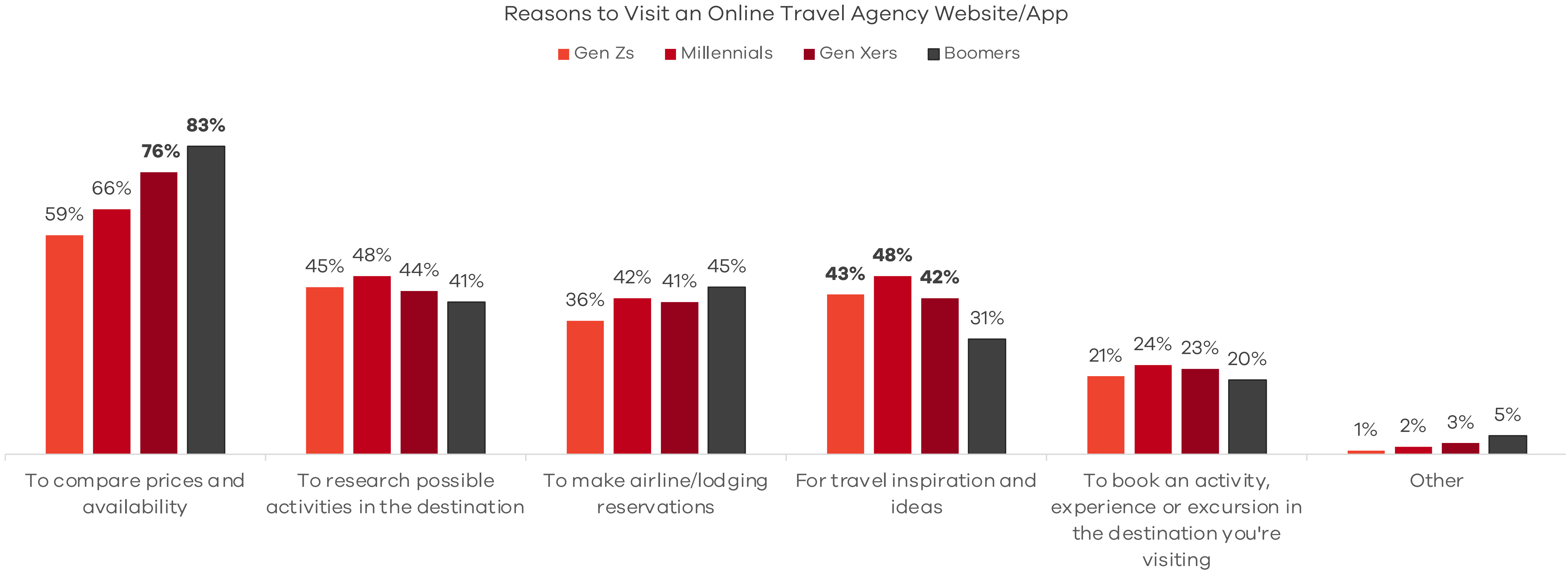


Active Leisure Travelers Are Predominantly Using OTAs to Compare Prices and Availability.

Data in bold indicates a statistically significant difference from 2021.
Base: Active leisure travelers who use OTAs (n=2,521)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

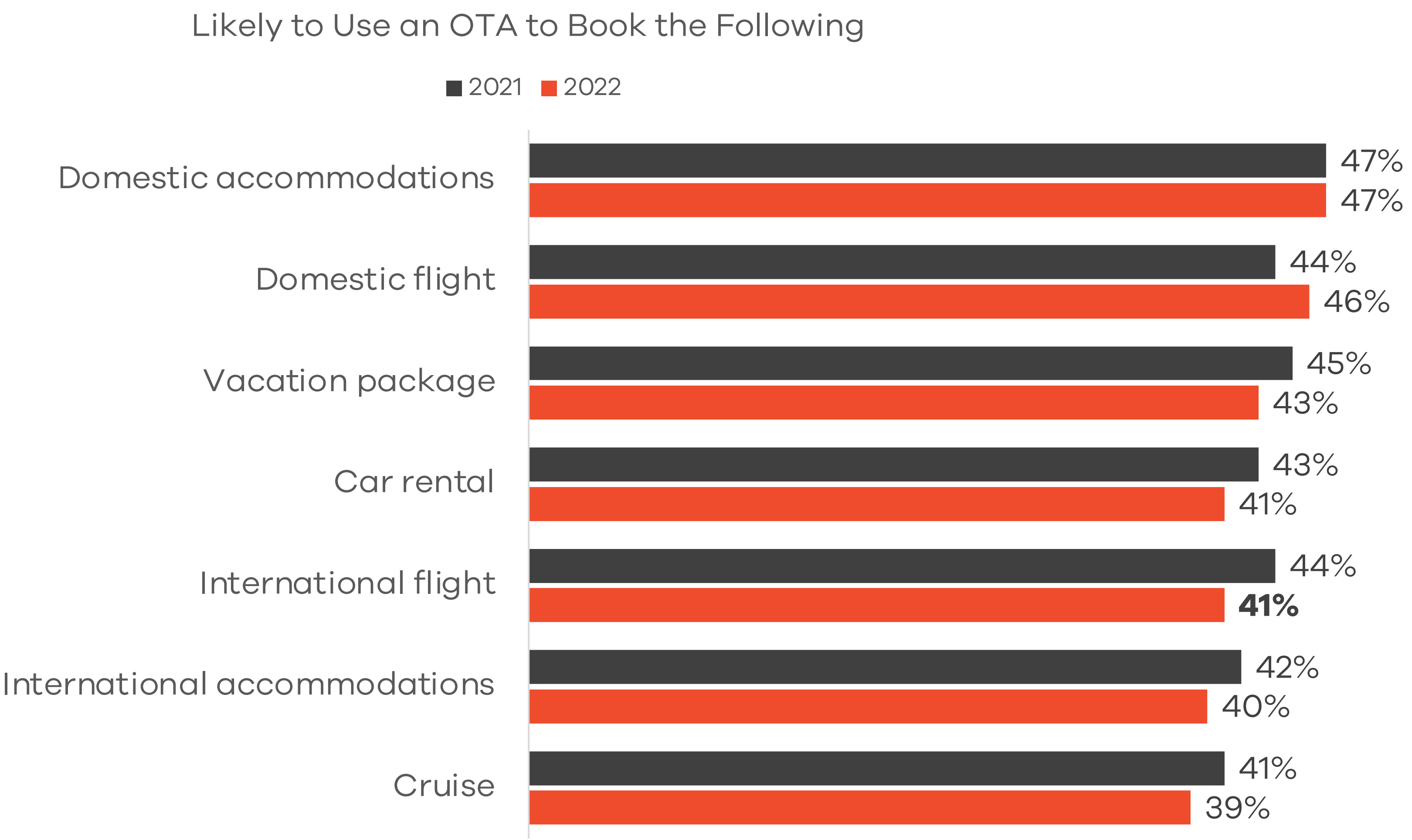
Younger Generations Are More Likely Than Other Generations to Use OTAs for Travel Inspiration and Ideas.



Data in bold indicates a statistically significant difference from other generational groups.
Base: Active leisure travelers (Gen Zs: n=302; Millennials: n=841; Gen Xers: n=663; Boomers: n=646)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

OTA Users Are Most Likely to Use OTAs to Book Domestic Accommodations, Domestic Flights and Vacation Packages.



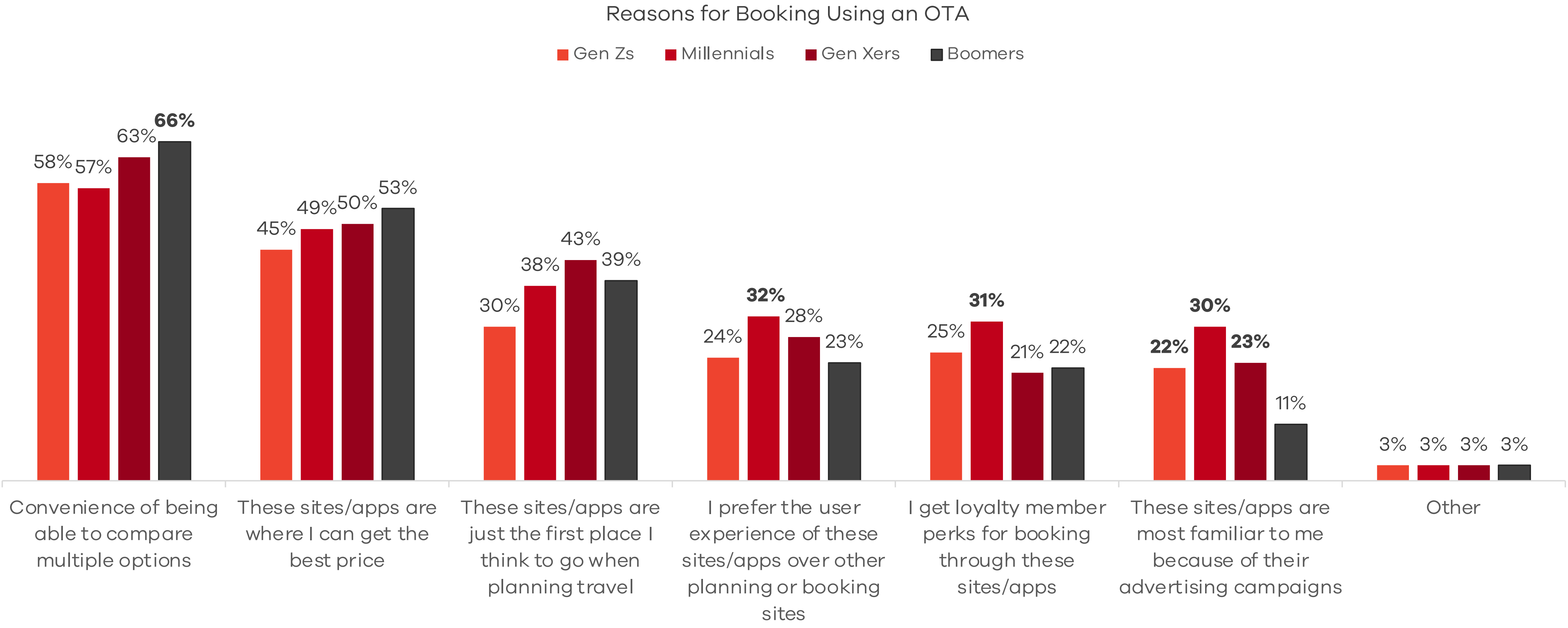
Data in bold indicates a statistically significant difference from 2021.
Base: Active leisure travelers who use OTAs (n=2,521)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

Reasons for Booking Using an OTA

	Oct '21	Oct '22
Convenience of being able to compare multiple options	53%	**61%**
These sites/apps are where I can get the best price	48%	50%
These sites/apps are just the first place I think to go when planning travel	38%	38%
I prefer the user experience of these sites/apps over other planning or booking sites	29%	28%
I get loyalty member perks for booking through these sites/apps	25%	25%
These sites/apps are most familiar to me because of their advertising campaigns	24%	22%
Other	3%	3%

Base: Active leisure travelers who are likely to book using an OTA (n=2,125)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

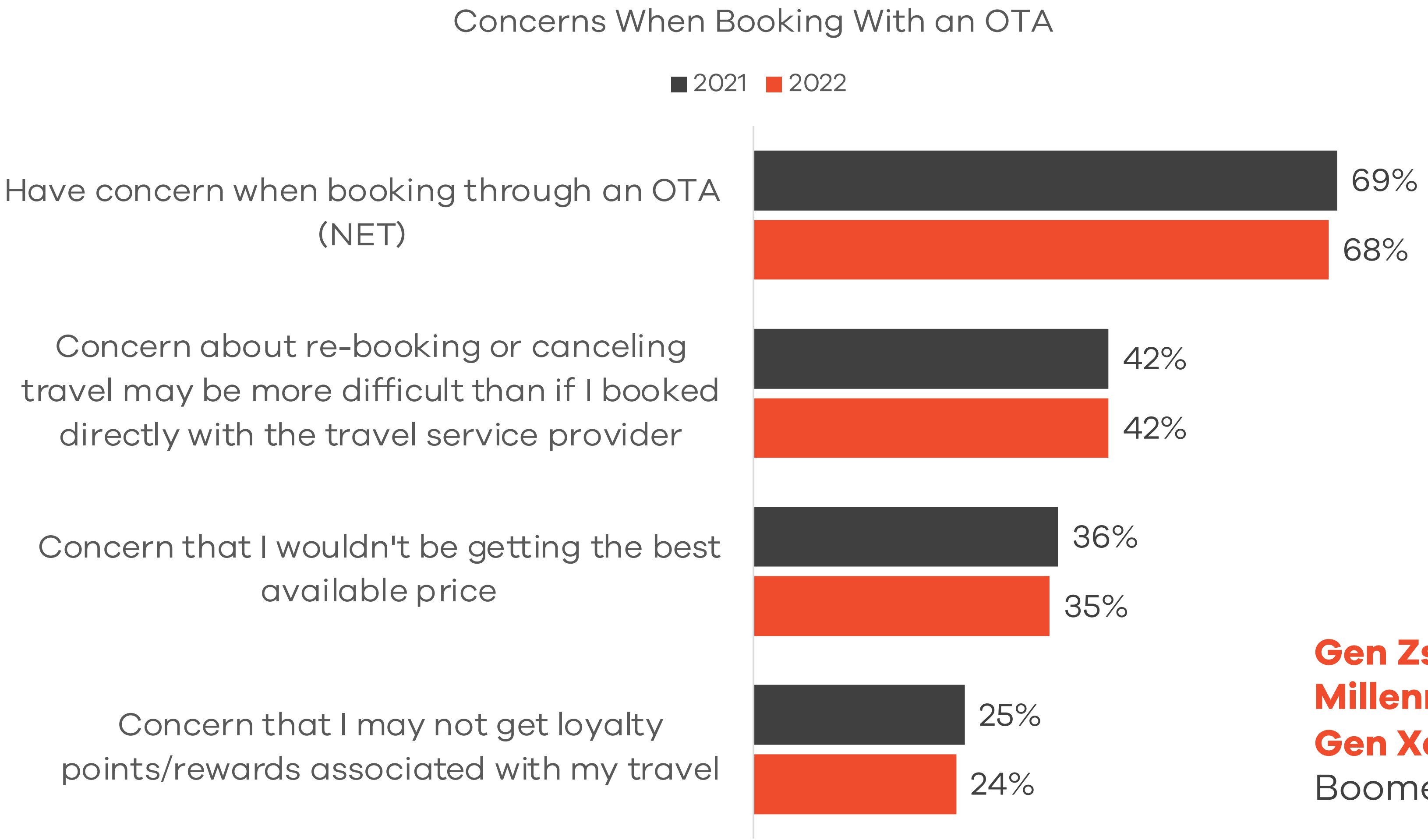
Using OTAs for Convenience and Because They Believe That Is Where They'll Get the Best Prices Increases With Age.



Data in bold indicates a statistically significant difference from other generational groups.
Base: Active leisure travelers who are likely to book using an OTA (Gen Zs: n=265; Millennials: n=733; Gen Xers: n=544; Boomers: n=529)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Seven in 10 Active Leisure Travelers Have At Least One of the Following Concerns When Booking With an OTA.



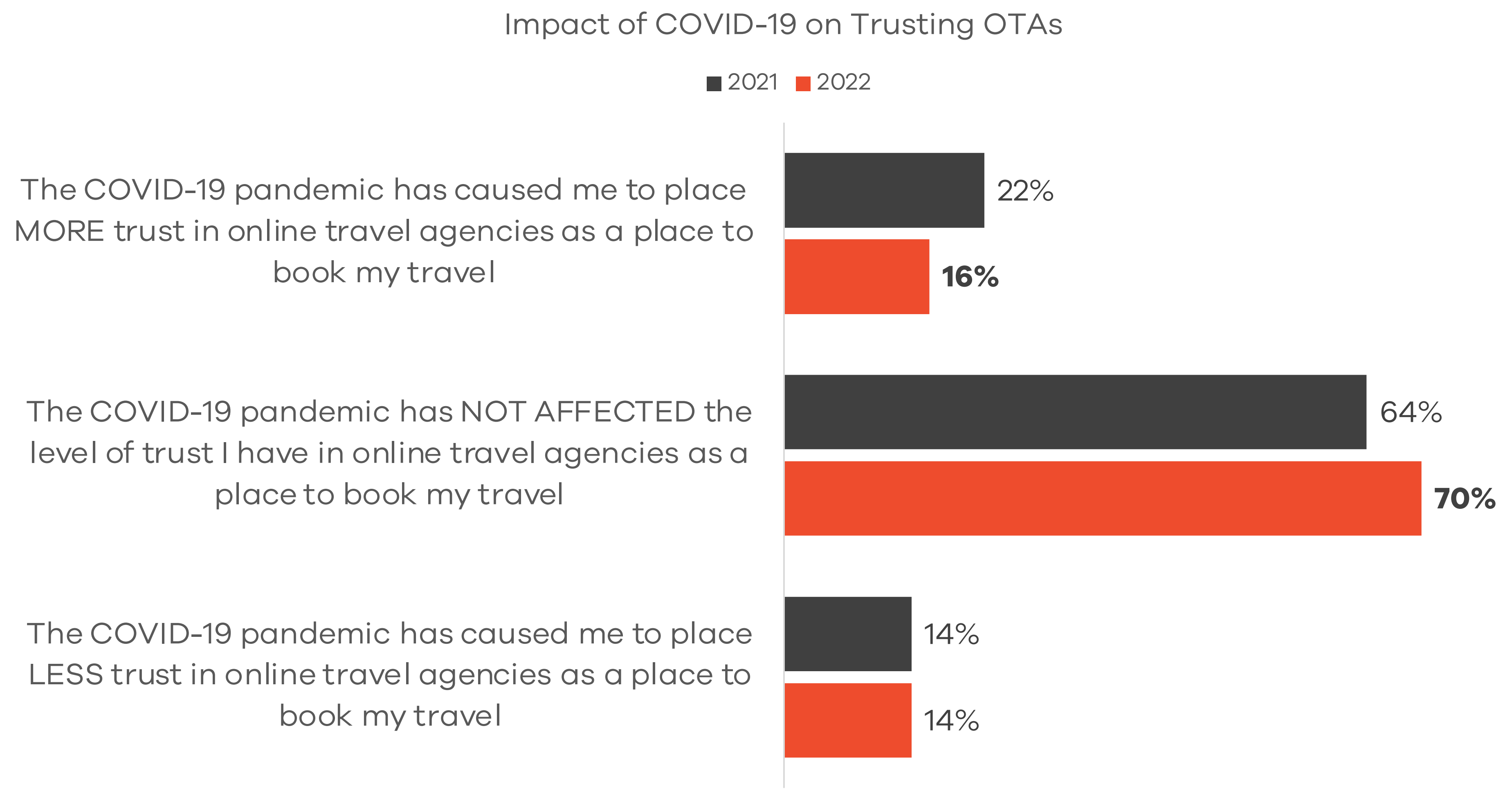
- Compared to last year, a similar percentage of travelers have concerns when booking through an OTA.
- Significantly more younger generations than older generations have concerns when booking through an OTA. Despite this, more younger generations than older generations are still turning to OTAs for research and booking.

Gen Zs: 79%
Millennials: 71%
Gen Xers: 66%
Boomers: 60%

Base: Active leisure travelers (n=3,338)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

The Majority of Travelers Indicate Their Level of Trust in OTAs Has Not Been Affected by the Pandemic.



Data in bold indicates a statistically significant difference from 2021.
Base: Active leisure travelers (n=3,338)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

ONLINE TRAVEL AGENCIES SUMMARY

KEY TAKEAWAY:

- Three-quarters of active leisure travelers visit at least one online travel agency (OTA) on a regular basis when researching or booking travel, a similar percentage as those who reported doing so in 2021. Gen Zs (82%), Millennials (86%) and Gen Xers (81%) are using OTAs more than Boomers (62%). Expedia (36%), Tripadvisor (28%), Booking.com (26%) and Hotels.com (26%) are the most popular sites among active leisure travelers, with significantly more using Expedia, Tripadvisor and Booking.com compared to last year.
- These travelers are most likely to use an OTA to book domestic accommodations (47%) and flights (46%), and they are doing so for the convenience of comparing multiple options (61%) and because they believe these sites offer the best prices (50%).
- Seven in 10 active leisure travelers have concerns about booking with an OTA, including concerns that canceling or re-booking may be more difficult than if they had booked directly with the travel service provider (42%) or concerns that they aren't getting the best available price (35%). A similar percentage of active leisure travelers indicated these same concerns last year.

ONLINE TRAVEL AGENCIES SUMMARY

WHAT IT MEANS:

- Despite having some concerns when booking travel through an OTA, active leisure travelers are still using OTAs to research and book travel and are doing so at a similar rate as last year.

MMGY Travel Intelligence

Brand Loyalty

Winter Module

Marriott, Hilton and Holiday Inn Are the Most Popular Hotel Brands Among Active Leisure Travelers.

Hotels Would Consider for Future Leisure Trip	Oct '21	Oct '22
Marriott	49%	**57%**
Hilton	51%	**56%**
Holiday Inn	41%	**46%**
Hyatt	36%	**40%**
Hilton Garden Inn	35%	**39%**
Hampton	37%	38%
Wyndham	30%	**34%**
Comfort Inn	31%	31%
Sheraton	29%	31%
Best Western	32%	30%
Doubletree	27%	**30%**
Ritz Carlton	24%	**28%**
Radisson	23%	24%
Fairfield Inn	22%	23%
Choice Hotels	22%	20%

/ Compared to last year, consideration for Marriott, Hilton, Holiday Inn, Hyatt, Hilton Garden Inn, Wyndham, Doubletree and Ritz Carlton have increased.

Base: Active leisure travelers (n=3,338)
Source: MMGY Global's 2022 *Portrait of American Travelers®* "Winter Edition"

MMGY Travel Intelligence

American Airlines, Delta and United Are the Most Popular Airline Brands Among Active Leisure Travelers.

Airlines Would Consider for Future Leisure Trip	Oct '21	Oct '22
American Airlines	46%	**54%**
Delta	45%	**53%**
United	43%	**49%**
Southwest	41%	**46%**
JetBlue	26%	28%
Alaska Airlines	21%	**25%**
British Airways	17%	**19%**
Virgin Atlantic	16%	16%
Air Canada	15%	15%
Lufthansa	13%	13%

/ Compared to last year, consideration for American Airlines, Delta, United, Southwest, Alaska Airlines and British Airways have increased.

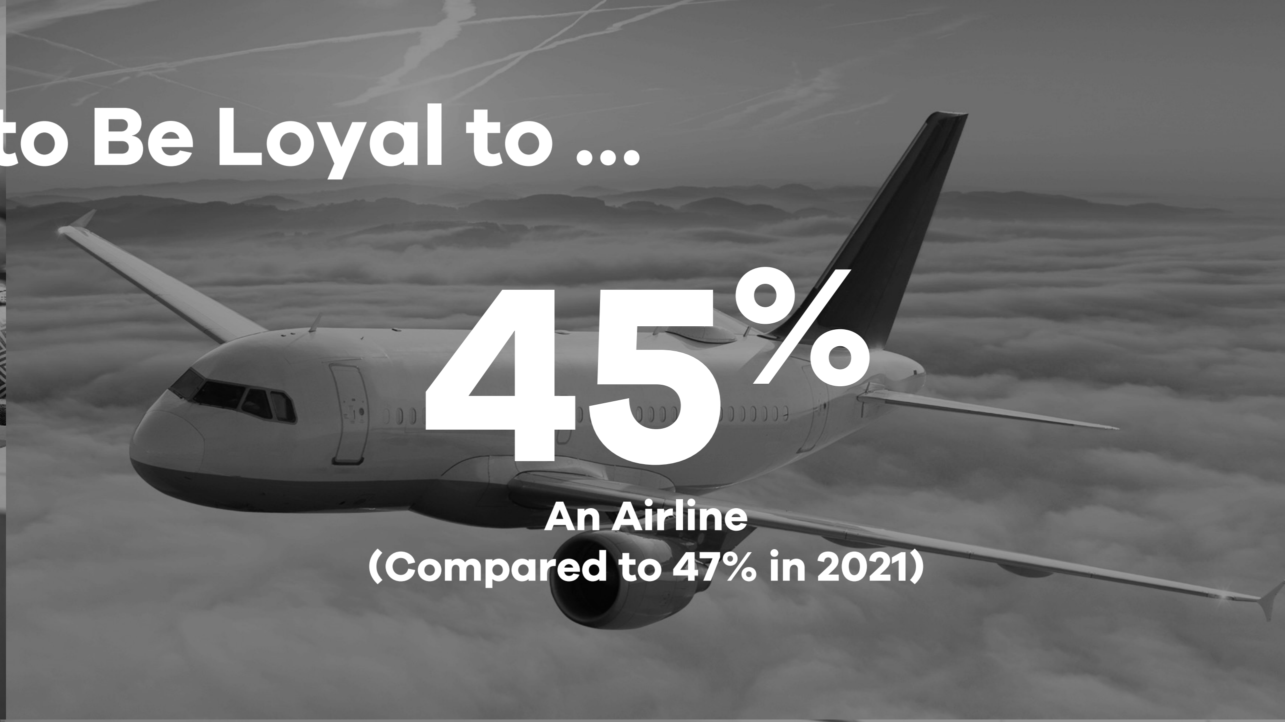
Base: Active leisure travelers (n=3,338)
Source: MMGY Global's 2022 *Portrait of American Travelers®* "Winter Edition"

MMGY Travel Intelligence

% Agree: I Consider Myself to Be Loyal to ...

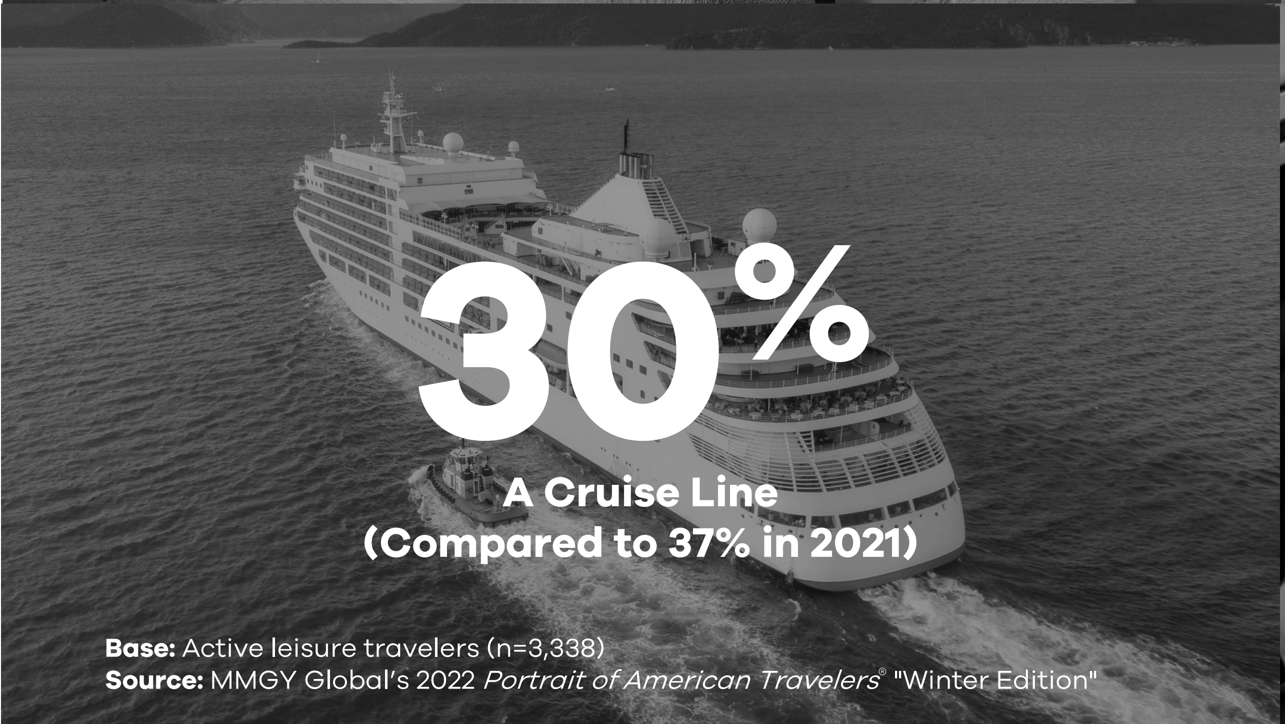
44%

A Hotel Brand
(Compared to 48% in 2021)



45%

An Airline
(Compared to 47% in 2021)



30%

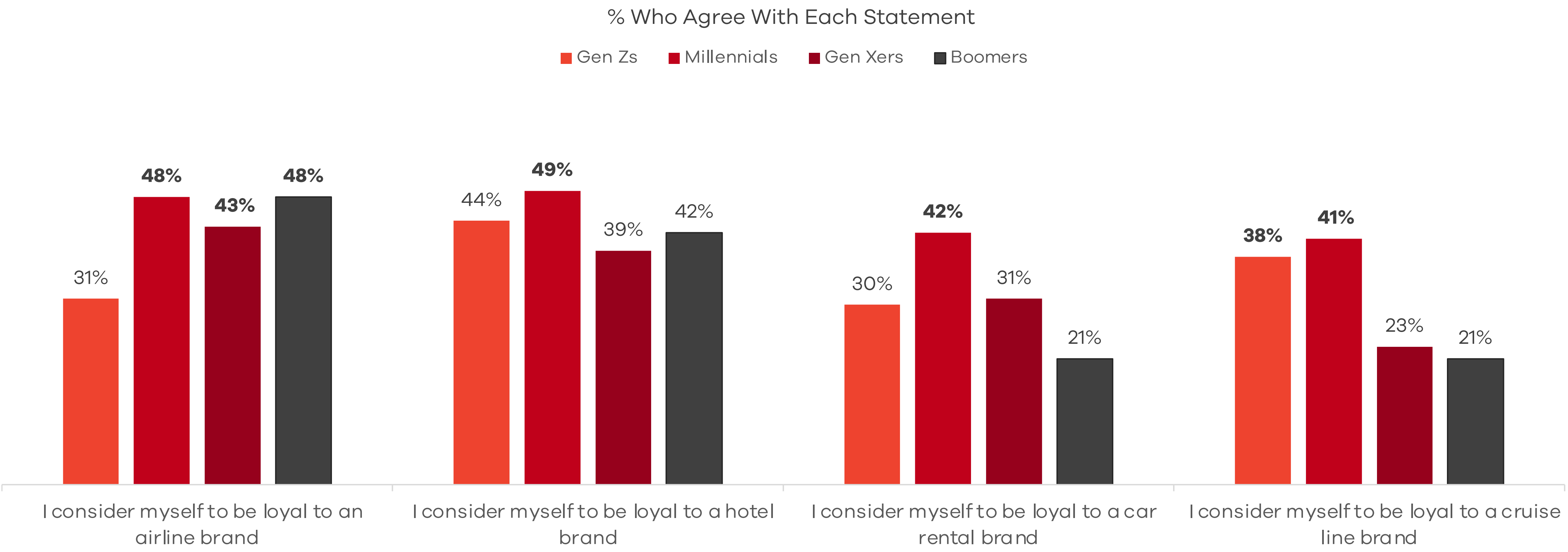
A Cruise Line
(Compared to 37% in 2021)

31%

A Car Rental Brand
(Compared to 36% in 2021)

Base: Active leisure travelers (n=3,338)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

Millennials Display the Most Loyalty Toward All Travel Categories.



Data in bold indicates a statistically significant difference from other generational groups.
Base: Active leisure travelers (Gen Zs: n=368; Millennials: n=977; Gen Xers: n=819; Boomers: n=1,043)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

Hotel Loyalty Programs

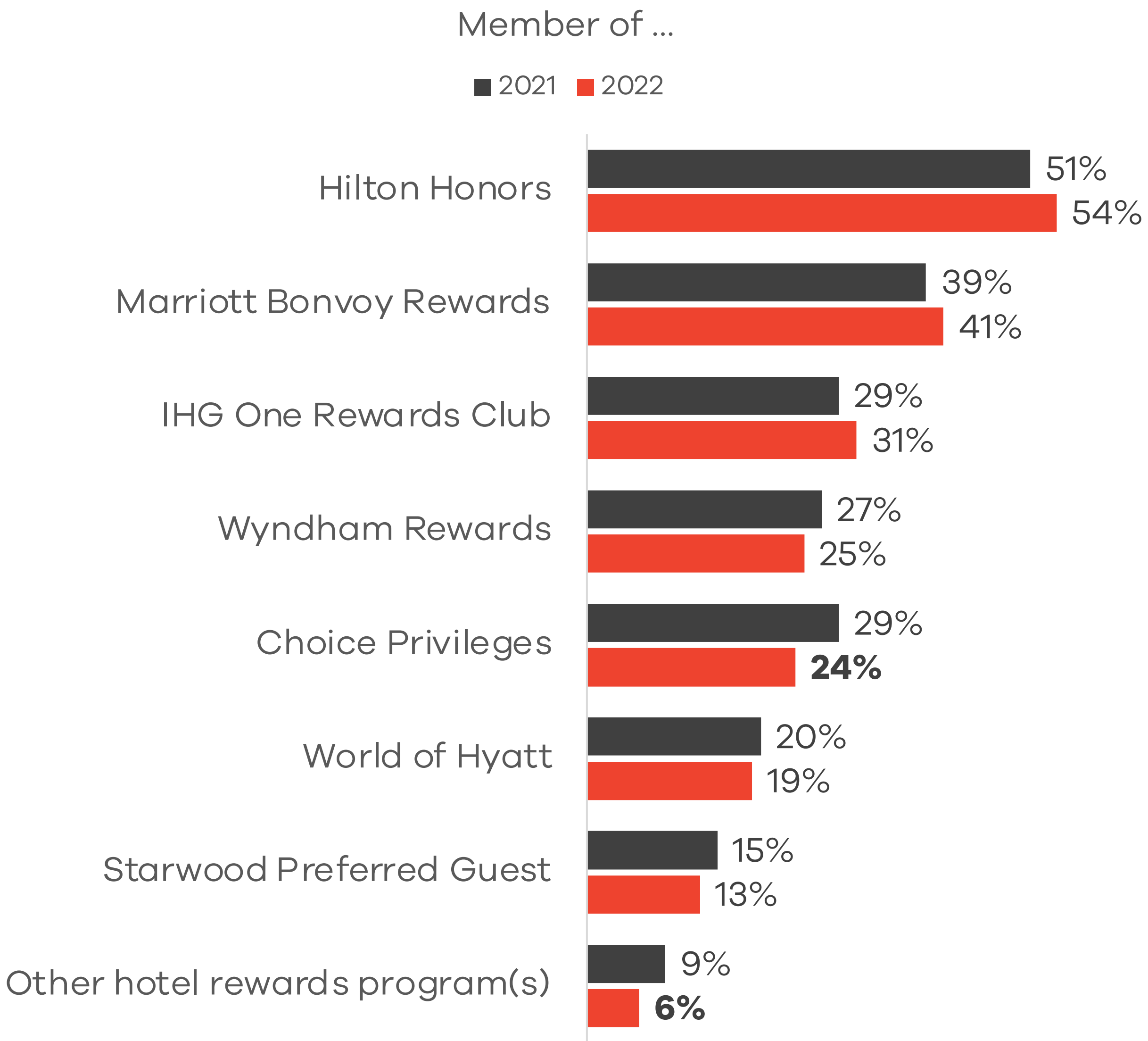
52% 2021
51% 2022

of active leisure travelers are active members of a hotel loyalty program.

Gen Zs: 33%
Millennials: 48%
Gen Xers: 49%
Boomers: 60%

Have Kids: 53%
Don't Have Kids: 49%

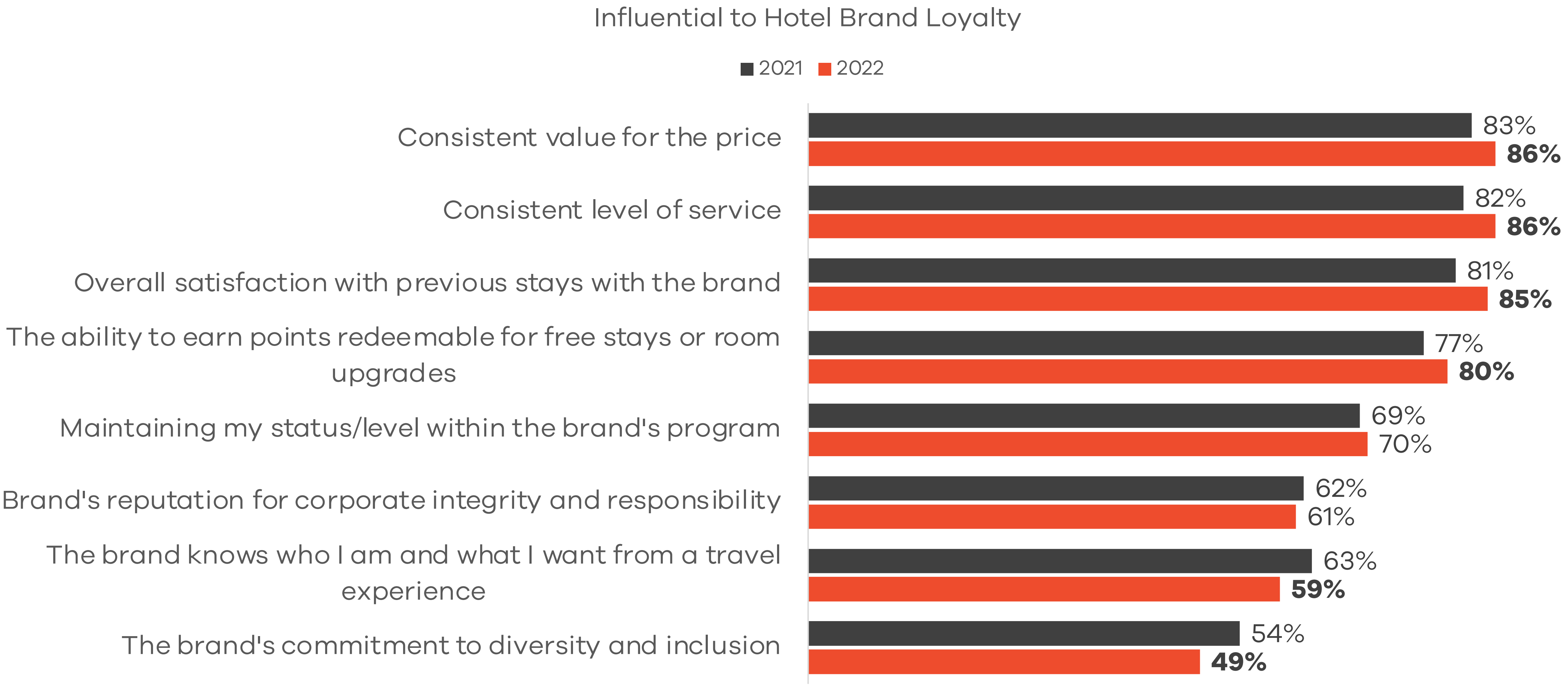
Less Than $100K: 38%
More Than $100K: 65%



Data in bold indicates a statistically significant difference from 2021.
Base: Active leisure travelers (n=3,338); member of a hotel loyalty program (n=1,699)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Consistency in Value, Level of Service and Previous Satisfaction With the Brand Are the Top Influential Factors of Hotel Brand Loyalty.



Data in bold indicates a statistically significant difference from 2021.
Base: Member of a hotel loyalty program (n=1,699)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

Airline Frequent Flyer Programs

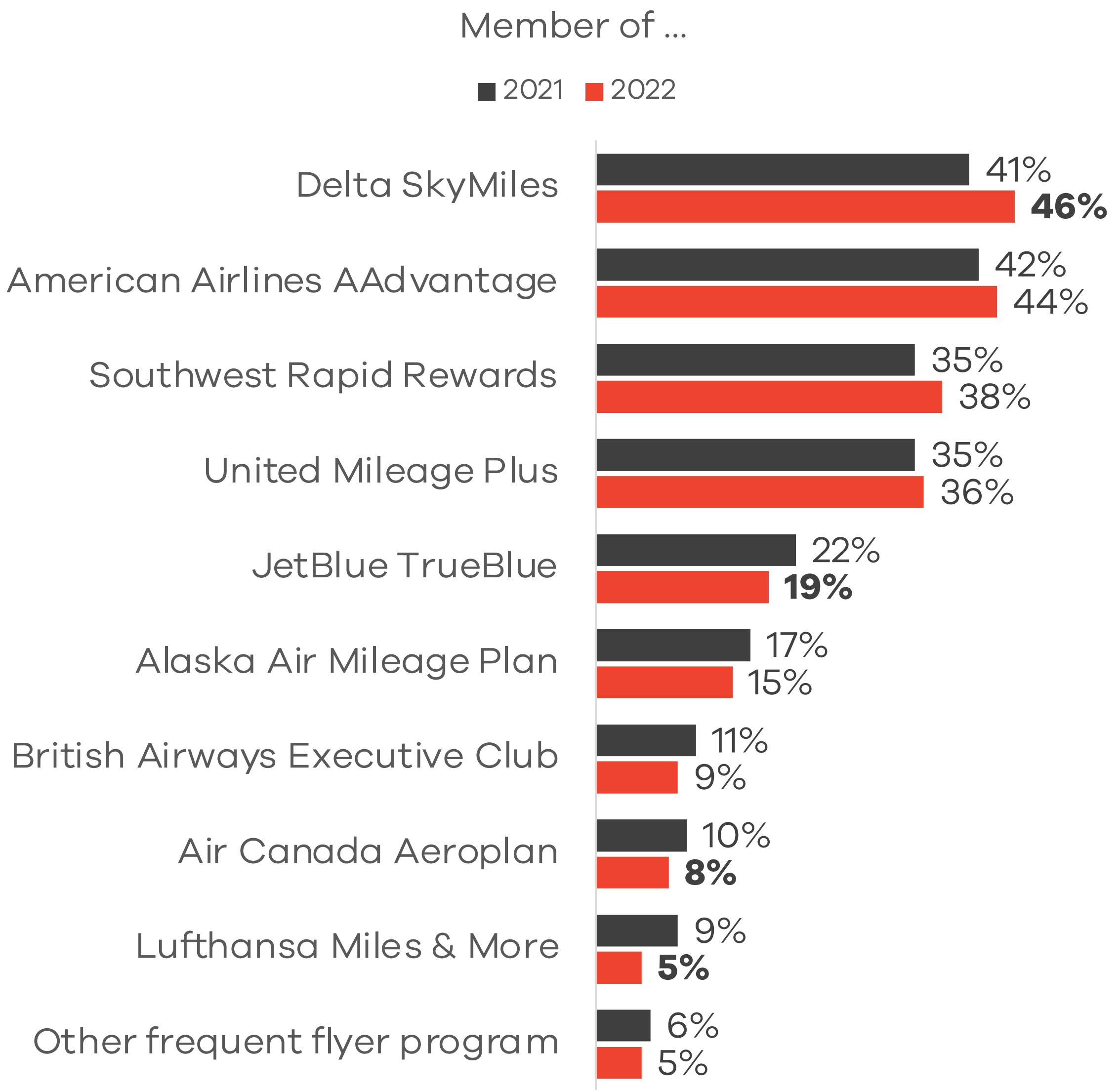
48% 2021 48% 2022

of active leisure travelers are active members of a frequent flyer program.

Gen Zs: 29%
Millennials: 41%
Gen Xers: 45%
Boomers: 60%

Have Kids: 44%
Don't Have Kids: 50%

Less Than $100K: 32%
More Than $100K: 65%



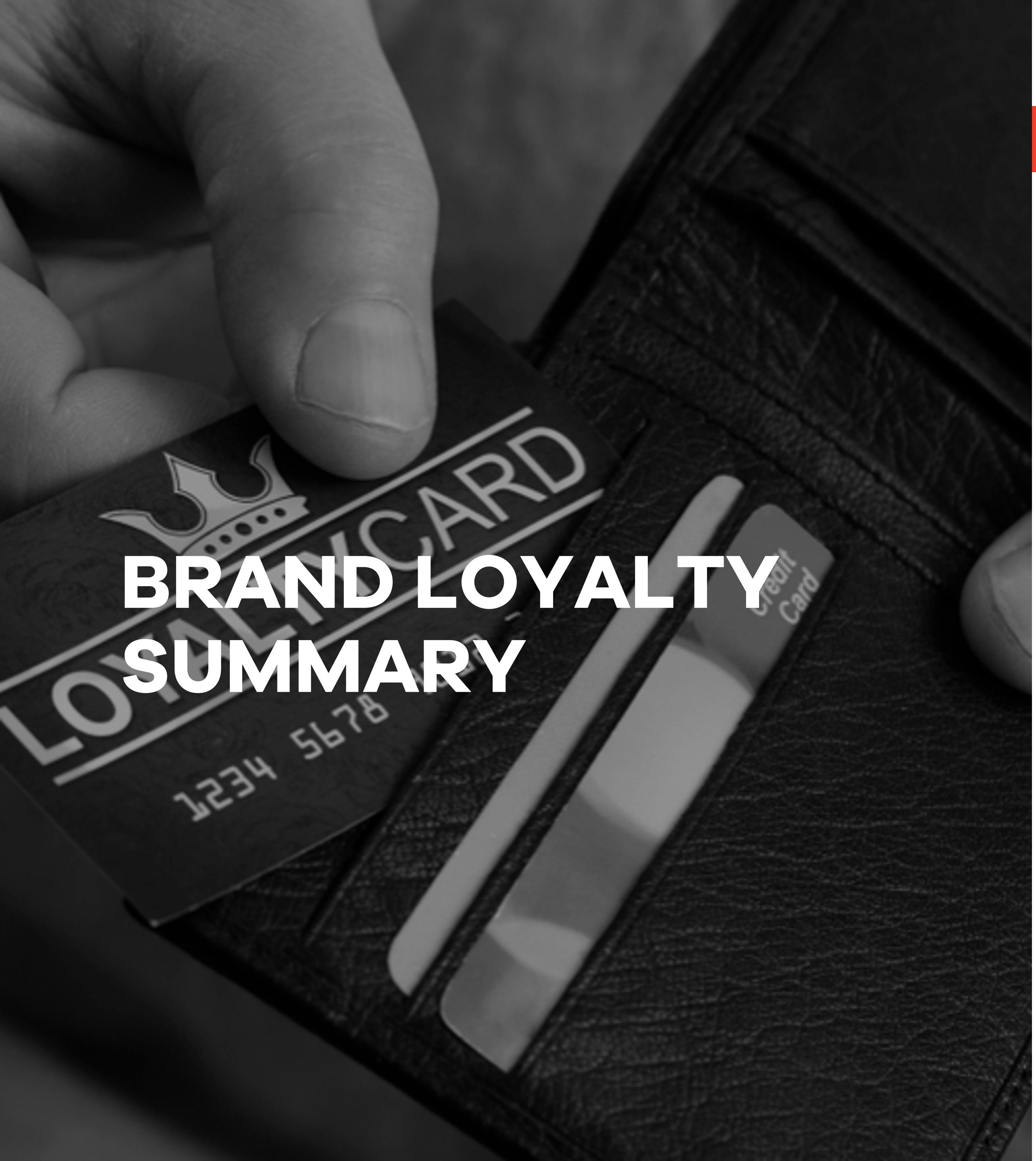
Data in bold indicates a statistically significant difference from 2021.
Base: Active leisure travelers (n=3,338); member of a frequent flyer program (n=1,601)
Source: MMGY Global's 2022 *Portrait of American Travelers®* "Winter Edition"

MMGY Travel Intelligence

Consistency in Value, Level of Service and Previous Satisfaction With the Brand Are Also the Top Influential Factors of Airline Loyalty.

Data in bold indicates a statistically significant difference from 2021.
Base: Member of a frequent flyer program (n=1,601)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence



BRAND LOYALTY SUMMARY

KEY TAKEAWAY:

- More than 4 in 10 active leisure travelers (44%) indicate they consider themselves to be loyal to a hotel brand, down slightly from last year (48%). Marriott (57%), Hilton (56%) and Holiday Inn (46%) garner the most interest among these travelers. Half (51%) are active members of at least one hotel loyalty program, with Hilton Honors (54%) and Marriott Bonvoy (41%) displaying the highest popularity. The top influential factors that lead to hotel brand loyalty include consistency in value for the price and level of service as well as overall satisfaction with the brand previously.
- More than 4 in 10 active leisure travelers (45%) indicate they consider themselves to be loyal to an airline, down slightly from last year (47%). American Airlines (54%), Delta (53%), United (49%) and Southwest (46%) garner the most interest among these travelers. Half (48%) are active members of at least one airline frequent flyer program, with Delta SkyMiles (46%) and American Airlines AAdvantage (44%) displaying the highest popularity. The top influential factors that lead to airline loyalty include consistency in value for the price and level of service as well as overall satisfaction with previous flight experiences.

Cruising

Winter Module

MMGY Travel Intelligence

53% 2021 **55%** 2022

of active leisure travelers are interested in taking a cruise in the next two years.

Gen Zs: 53%
Millennials: 66%
Gen Xers: 53%
Boomers: 49%

Have Kids: 66%
Don't Have Kids: 50%

Less Than $100K: 51%
More Than $100K: 60%

Base: Active leisure travelers (n=3,338)
Source: MMGY Global's 2022 *Portrait of American Travelers®* "Winter Edition"

Royal Caribbean, Carnival, Disney and Norwegian Garner the Most Interest Among Those Interested in Cruising.

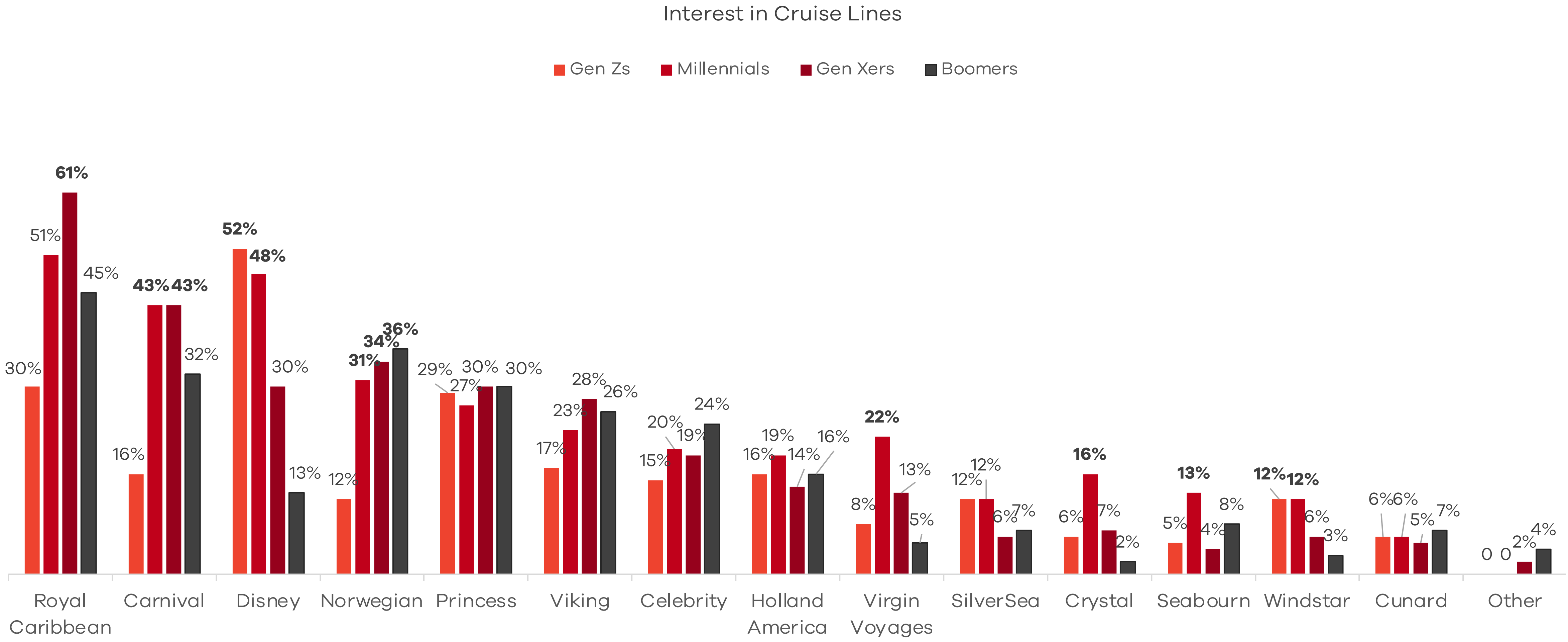
Base: Active leisure travelers interested in cruising (n=1,851)
Source: MMGY Global's 2022 *Portrait of American Travelers®* "Winter Edition"

Interest in Cruise Lines

% Very/Extremely Interested	Oct '21	Oct '22
Royal Caribbean	43%	**48%**
Carnival	33%	**37%**
Disney	34%	33%
Norwegian	25%	**31%**
Princess	25%	**29%**
Viking	17%	**25%**
Celebrity	21%	20%
Holland America	18%	17%
Virgin Voyages	11%	**13%**
SilverSea	9%	9%
Crystal	9%	8%
Seabourn	7%	8%
Windstar	11%	**8%**
Cunard	6%	6%
Other	1%	3%

MMGY Travel Intelligence

Older Generations Are More Likely to Be Interested in Royal Caribbean, Carnival and Norwegian, While Younger Generations Are More Likely to Be Interested in Disney Cruise Lines.

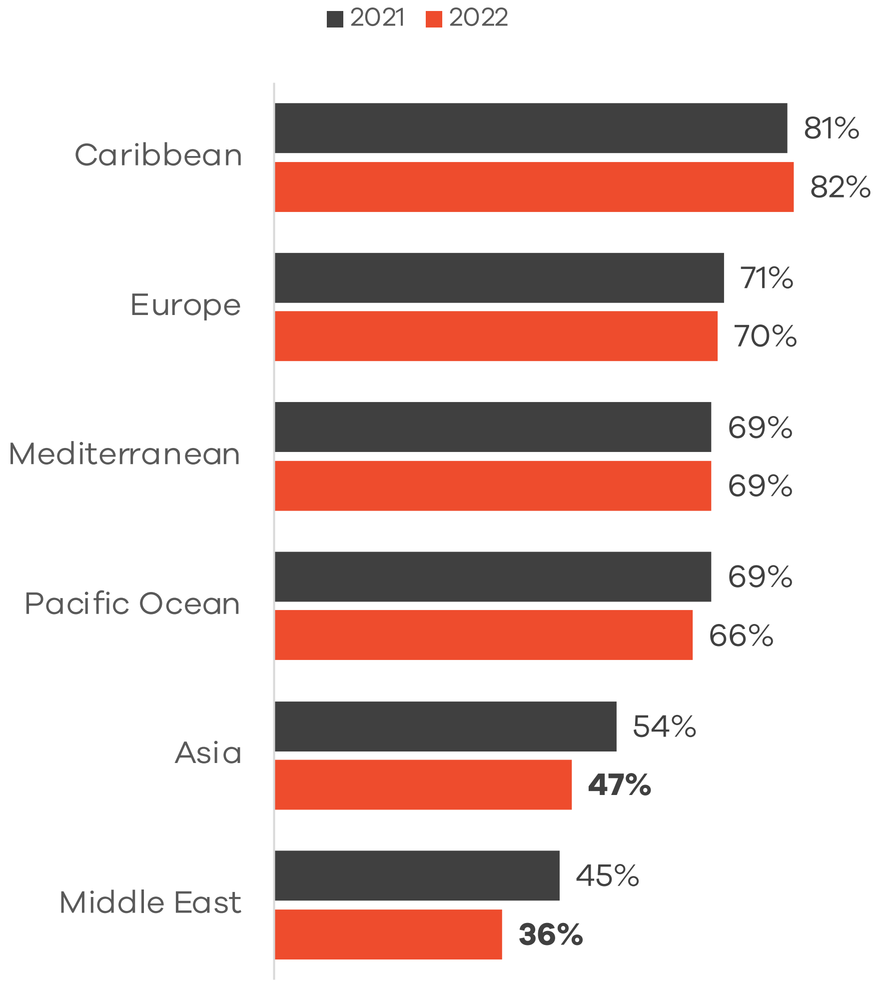


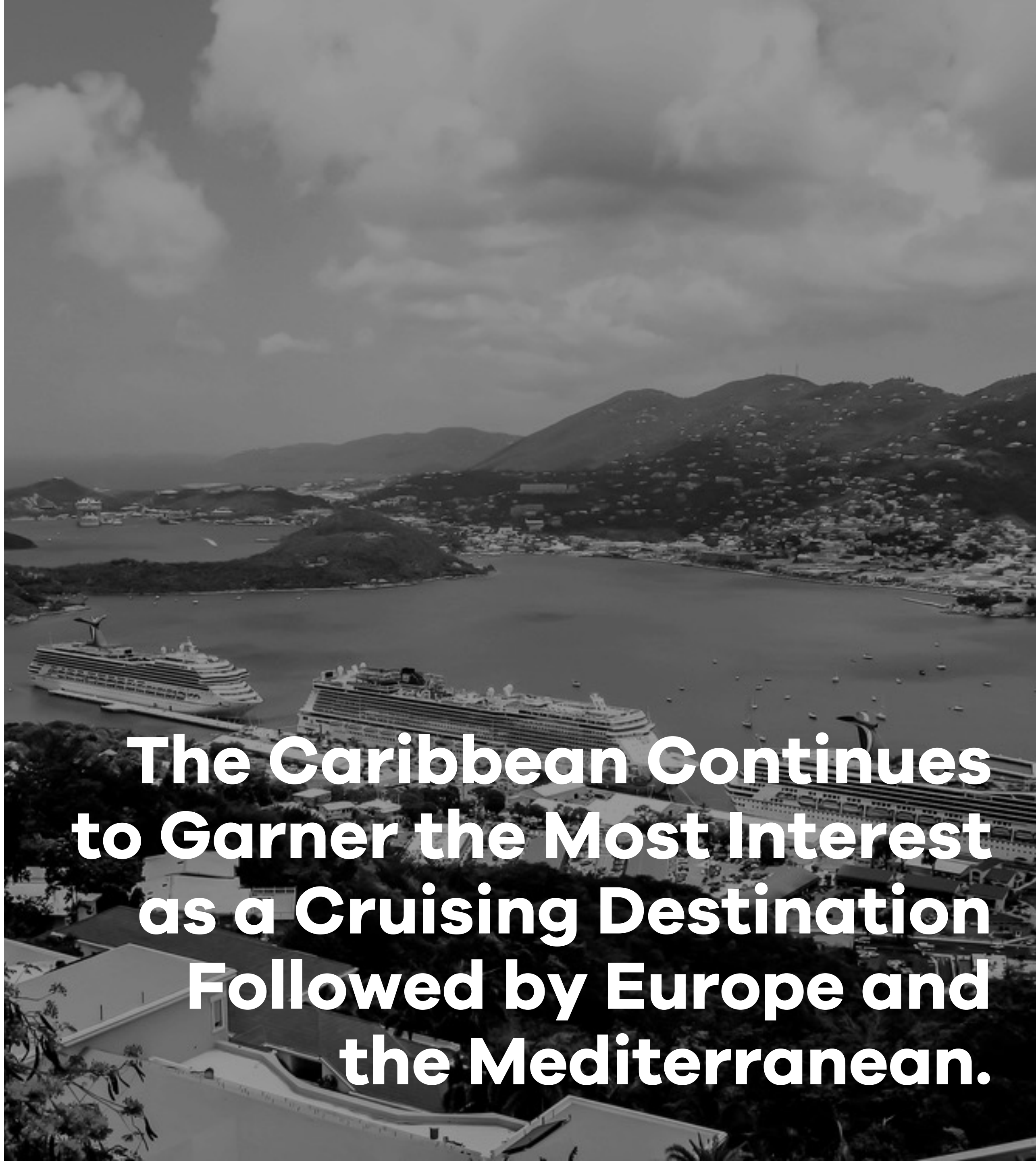
Base: Active leisure travelers interested in cruising (Gen Zs: n=194; Millennials: n=642; Gen Xers: n=438; Boomers: n=509)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

The Caribbean Continues to Garner the Most Interest as a Cruising Destination Followed by Europe and the Mediterranean.

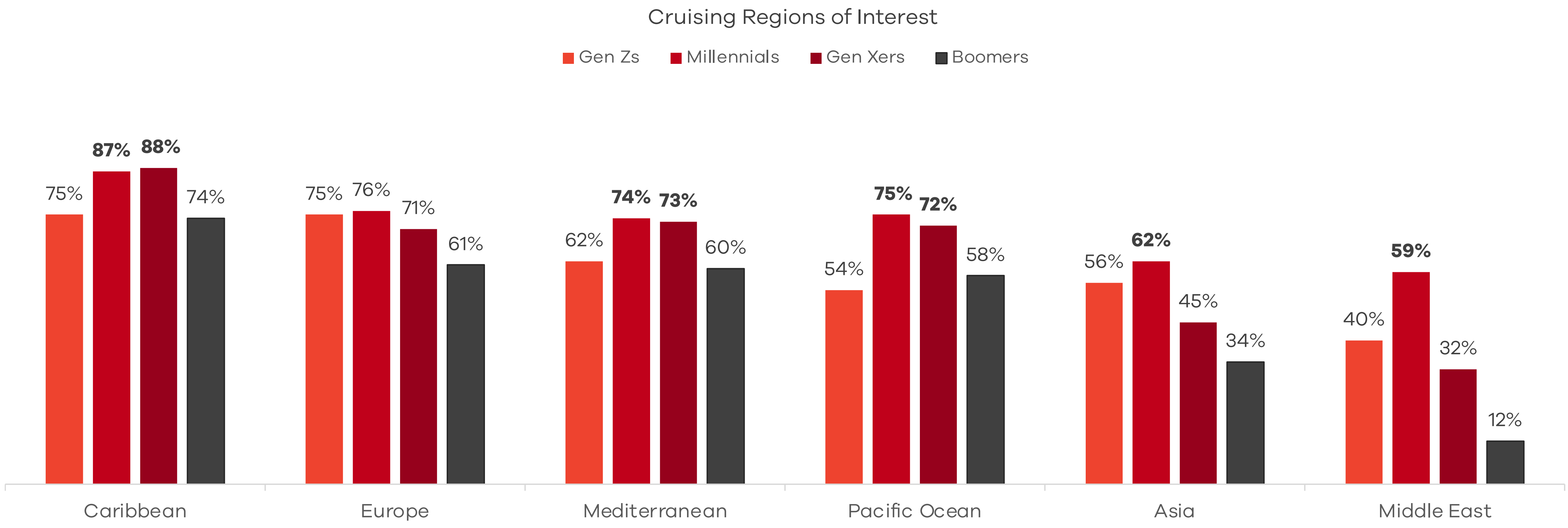
Cruising Regions of Interest
(Somewhat/Extremely Interested)





Base: Active leisure travelers interested in cruising (n=1,851)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

Caribbean, Mediterranean and Pacific Ocean Cruises Garner the Most Interest From Millennials and Gen Xers.



Base: Active leisure travelers interested in cruising (Gen Zs: n=194; Millennials: n=642; Gen Xers: n=438; Boomers: n=509)
Source: MMGY Global's 2022 *Portrait of American Travelers®* "Winter Edition"

MMGY Travel Intelligence

Quality of the Food Available Onboard and Cleanliness of the Ship/Brand Continue to Be the Most Influential Factors When Selecting a Cruise Line.

Influential When Selecting a Cruise Line	Oct '21	Oct '22
Quality of the food available onboard	80%	**83%**
Safety/cleanliness standards of cruise ship/brand	80%	81%
Price of the cruise	79%	78%
Cabin size/quality	75%	77%
Ports of call/available itineraries	75%	76%
Cruise brand name/reputation	73%	75%
Cost/convenience of traveling to/from port of departure	76%	75%
Quality and diversity of excursions available	70%	71%
Previous positive experience with the cruise line	67%	**64%**
Luxury accommodations	63%	62%
Nightlife/entertainment options	63%	**60%**
Proof of vaccination required	67%	**55%**
Membership in cruise line loyalty program	55%	**47%**
Availability of onboard gambling	50%	**44%**
Children's activities	45%	**41%**

/ Compared to last year, significantly more of those interested in cruising are influenced by the quality of food onboard, while significantly fewer are influenced by previous experience, nightlife options, required proof of vaccination, loyalty programs, onboard gambling and children's activities.

Base: Active leisure travelers interested in cruising (n=1,851)

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

MMGY Travel Intelligence

Quality of Food Available Onboard Is a Top Influential Factor Among All Generations.

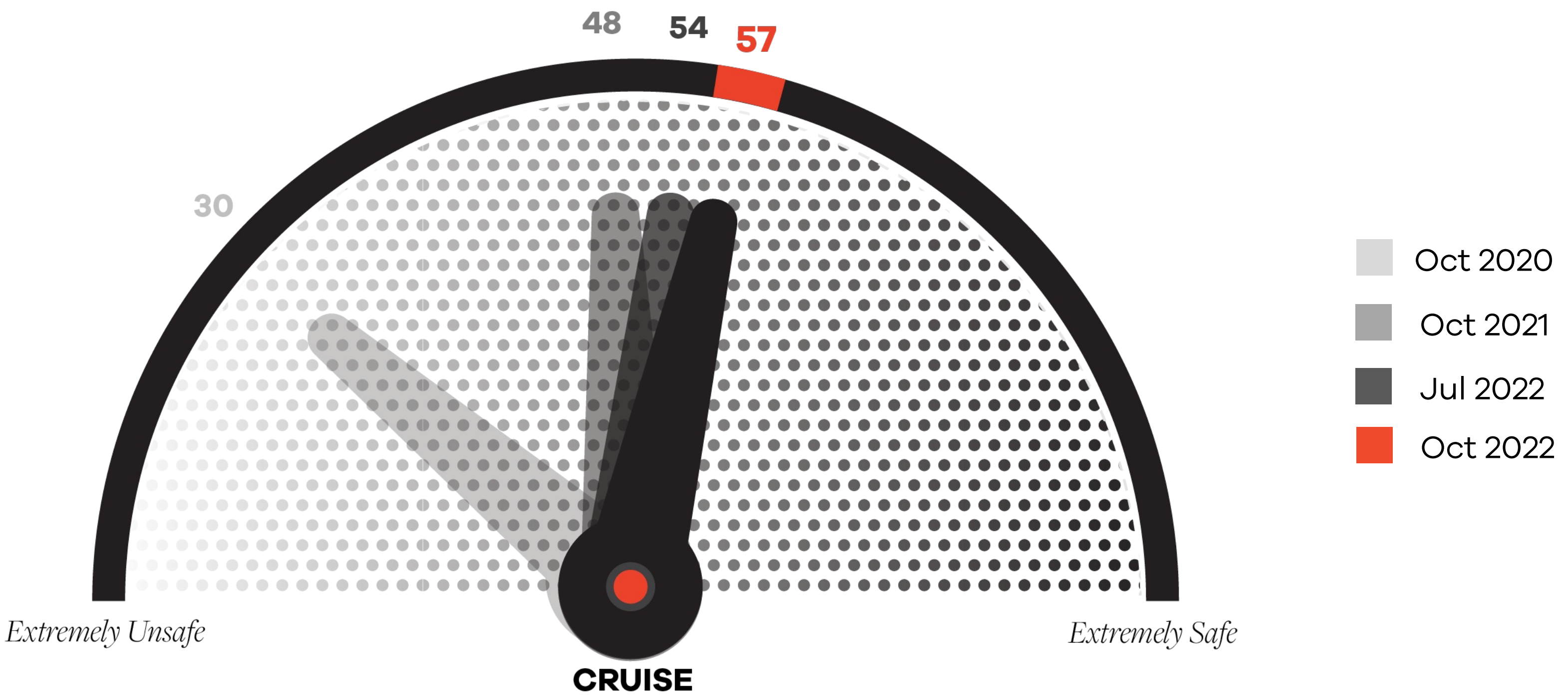
/ Safety/cleanliness standards and the price of the cruise are also top factors among many generations, while Millennials are also influenced by cabin size/quality, and Boomers are influenced by ports of call/itineraries.

Top three factors for each generation are highlighted in black.

Influential When Selecting a Cruise Line	Gen Zs	Millennials	Gen Xers	Boomers
Quality of the food available onboard	63%	78%	84%	95%
Safety/cleanliness standards of cruise ship/brand	67%	75%	84%	90%
Price of the cruise	63%	77%	82%	81%
Cabin size/quality	61%	77%	75%	85%
Ports of call/available itineraries	56%	68%	78%	89%
Cruise brand name/reputation	56%	72%	75%	85%
Cost/convenience of traveling to/from port of departure	53%	71%	80%	83%
Quality and diversity of excursions available	52%	75%	75%	72%
Previous positive experience with the cruise line	50%	65%	63%	67%
Luxury accommodations	46%	68%	63%	62%
Nightlife/entertainment options	54%	71%	57%	56%
Proof of vaccination required	51%	60%	48%	55%
Membership in cruise line loyalty program	50%	56%	43%	36%
Availability of onboard gambling	37%	60%	41%	34%
Children's activities	52%	65%	36%	16%

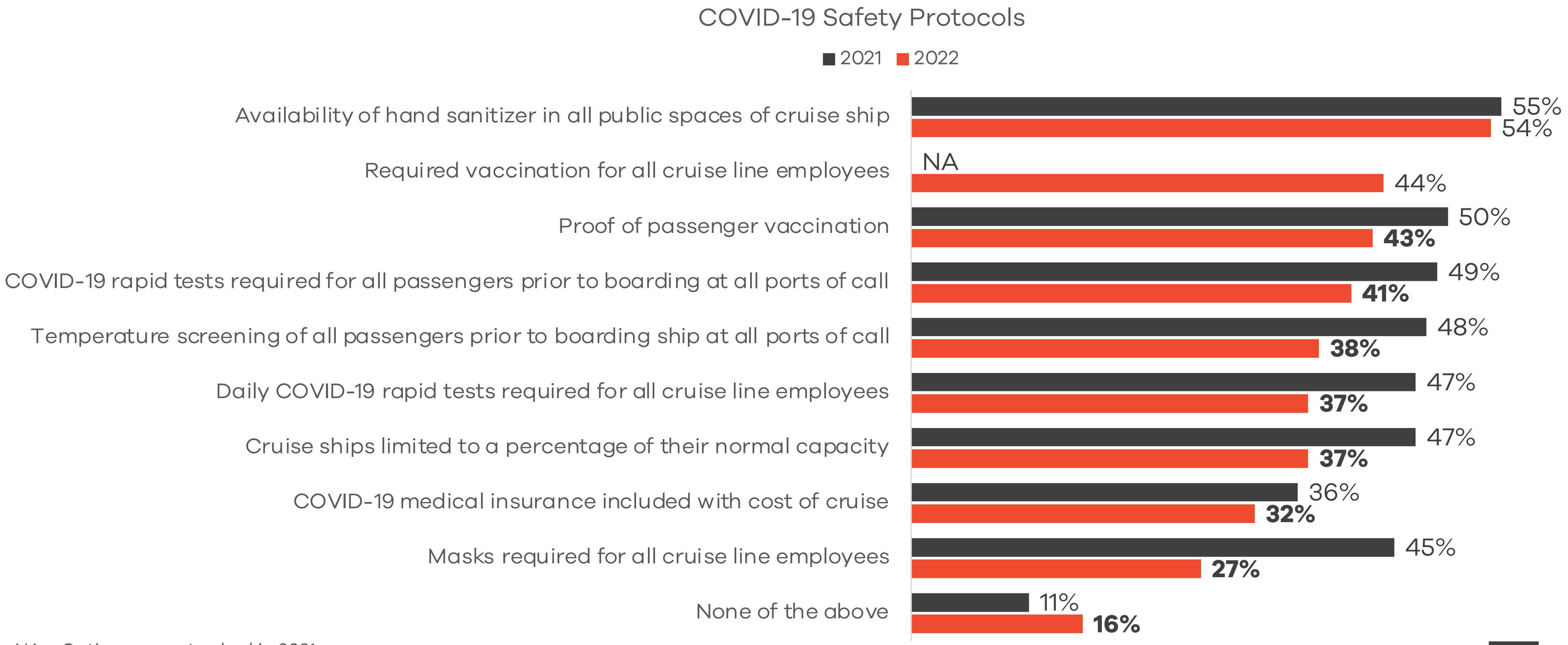
Base: Active leisure travelers interested in cruising (Gen Zs: n=194; Millennials: n=642; Gen Xers: n=438; Boomers: n=509)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

The Perceived Safety of Cruising Continues to Increase.



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

Compared to Last Year, Significantly Fewer Active Leisure Travelers Require Nearly All These Safety Protocols to Feel Safe When Taking a Cruise.



NA – Option was not asked in 2021
Base: Active leisure travelers (n=3,338)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

A Look at the Affluent Cruiser

Active Leisure Travelers With Household Incomes of $150,000+ Who Are Interested in Cruising in the Next Two Years

17% of all active leisure travelers

5.5 Average number of leisure trips in next 12 months

$7,823 Average spend on leisure travel in next 12 months

Top Cruising Regions of Interest:

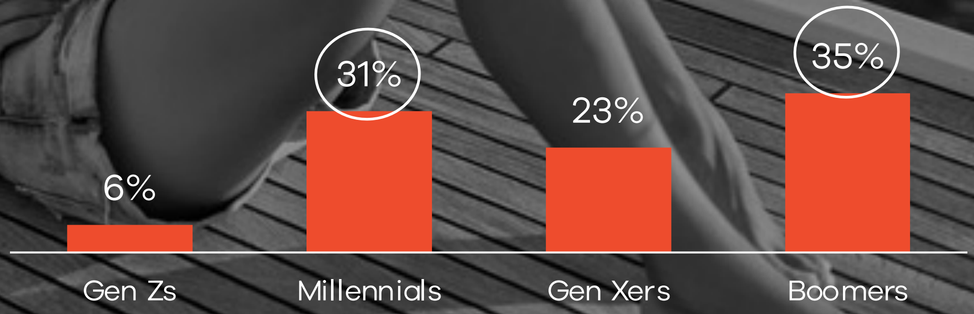
- Caribbean (80%)
- Mediterranean (74%)
- Europe (73%)
- Pacific Ocean (63%)
- Asia (48%)
- Middle East (35%)

Top Motivations to Travel:

- To spend time with my spouse/significant other and/or children (82%)
- The desire to get away and unplug (79%)
- Experiencing different cultures (76%)
- The need/desire to visit friends or family (73%)
- Experiencing new cuisines (71%)

/ Significantly more Millennials and Boomers than other generations are considered to be affluent cruisers.

% Who Are Considered Affluent Cruisers



MMGY Travel Intelligence

CRUISING SUMMARY

KEY TAKEAWAY:

- More than half of active leisure travelers (55%) are interested in taking a cruise in the next two years, which is unchanged from last year (53%), with Millennials (66%), those with children (66%) and those with higher household incomes (60%) displaying the most interest. Royal Caribbean (48%), Carnival (37%), Disney (33%) and Norwegian (31%) garner the most interest among those interested in cruising. The Caribbean (82%), Europe (70%) and the Mediterranean (69%) continue to be the most popular cruising regions of interest. Cruisers are influenced by the quality of food available onboard (83%), the safety and cleanliness of the ship/brand (81%), and the price of the cruise (78%) when selecting a cruise line.
- Compared to last year, significantly fewer travelers require many safety protocols to feel safe when taking a cruise. More than half (54%) would like to see the availability of hand sanitizer in all public spaces of the cruise ship, followed by more than 4 in 10 who would like required vaccinations for all cruise line employees (44%) and proof of passenger vaccination (43%).

MMGY Travel Intelligence

CRUISING SUMMARY

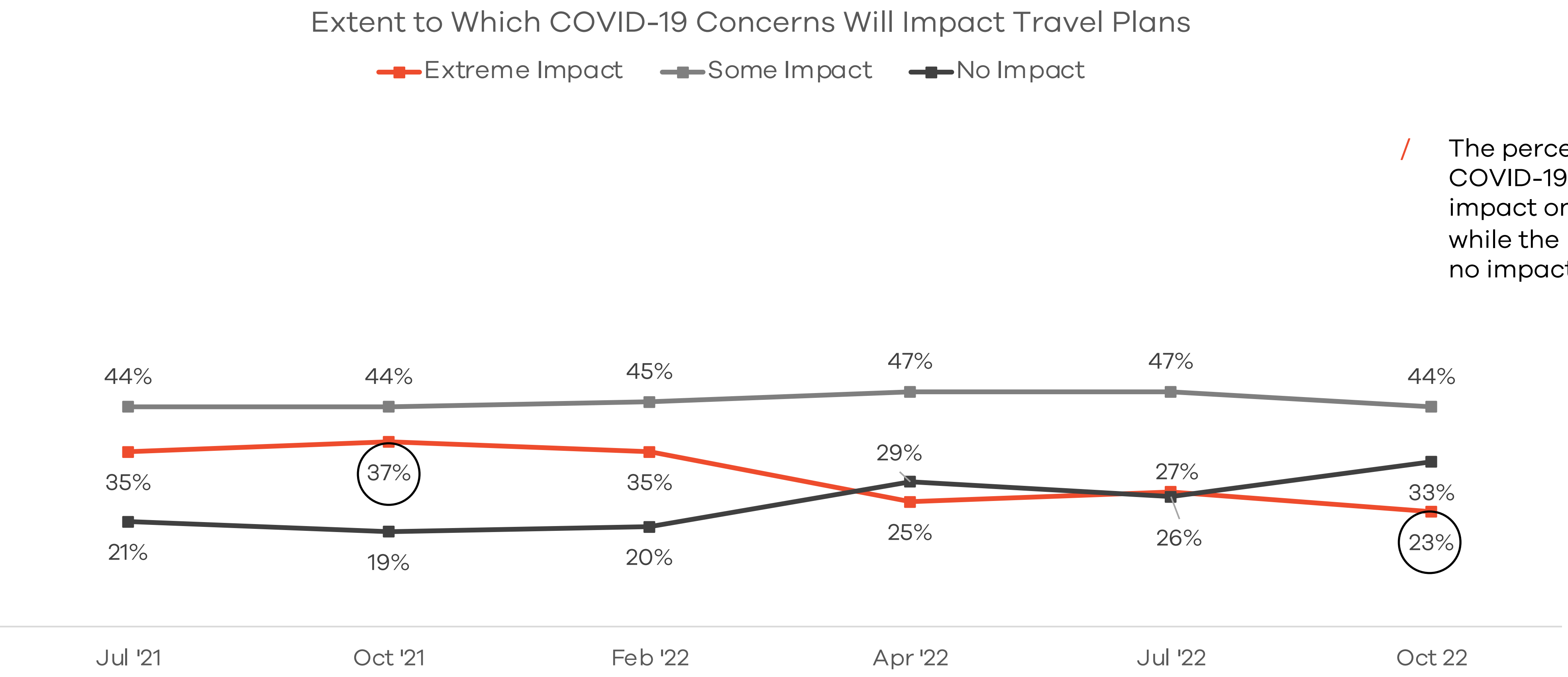
WHAT IT MEANS:

- The cruising industry took a large hit during the pandemic and has taken a bit longer to come back compared to other industries because of negative perceptions of safety. We're seeing these perceptions continue to decrease, and travelers are requiring fewer safety protocols from the cruise lines to feel safe cruising – showing signs that the industry is bouncing back.

COVID-19 Vaccinations and Travel

MM GY Travel Intelligence

Concerns of COVID-19 Continue to Decrease.



/ 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=3,338)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

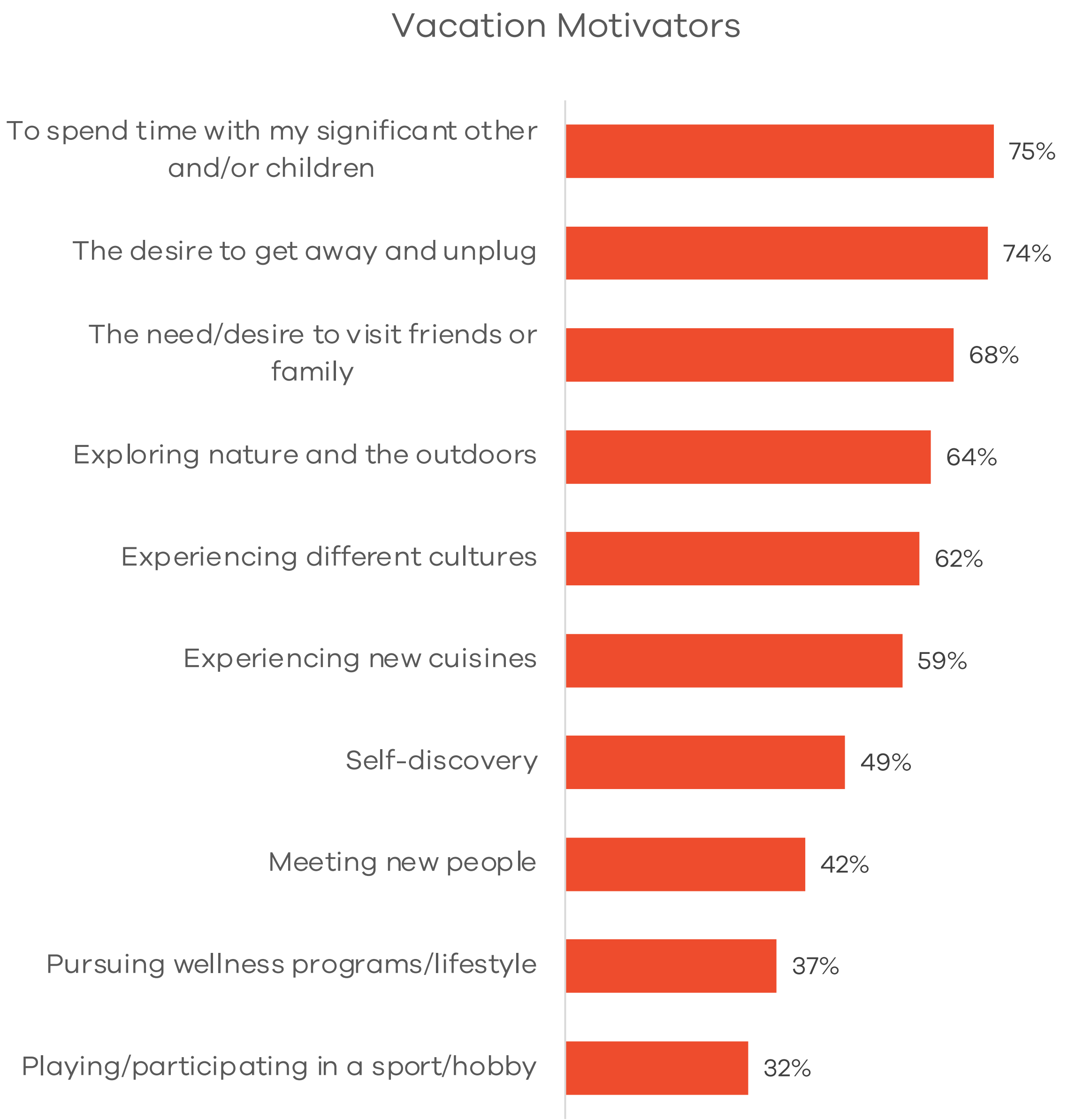
MMGY Travel Intelligence

Vacation Motivators and Activities

MMGY Travel Intelligence

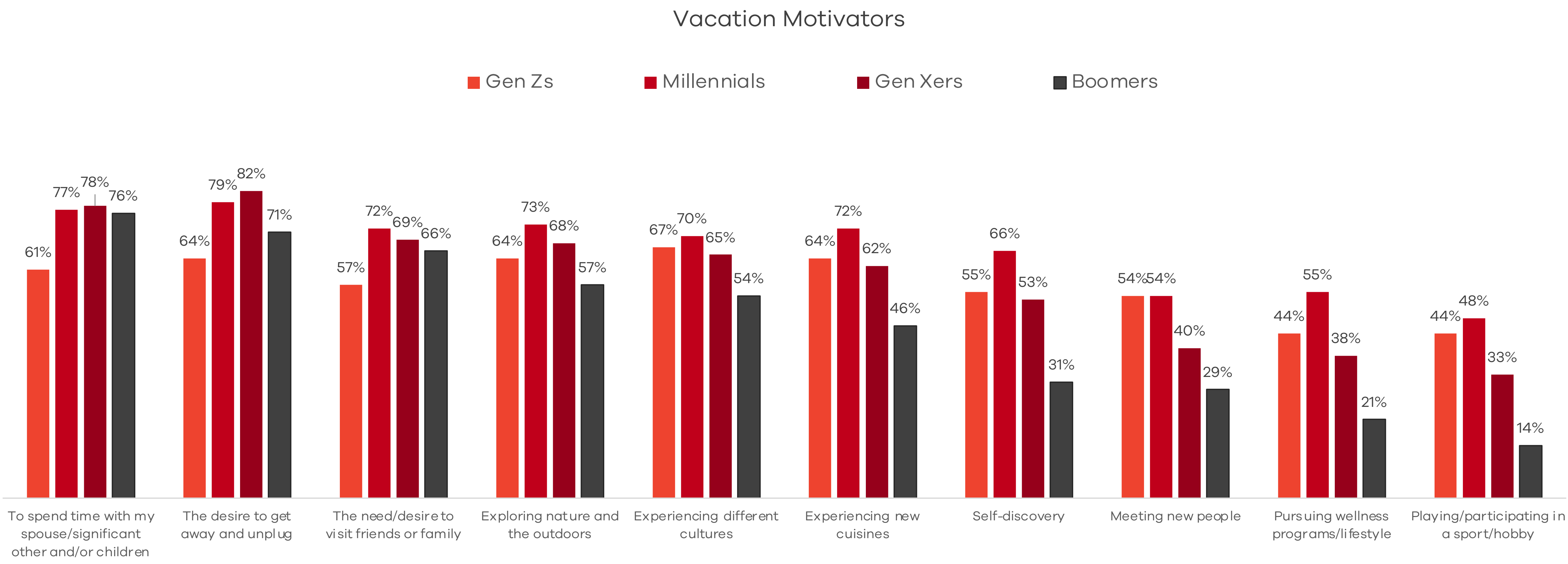
Spending Time With Family and "Unplugging" Continue to Be Top Motivators to Travel.

Base: Active travelers (n=3,338)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"



MMGY Travel Intelligence

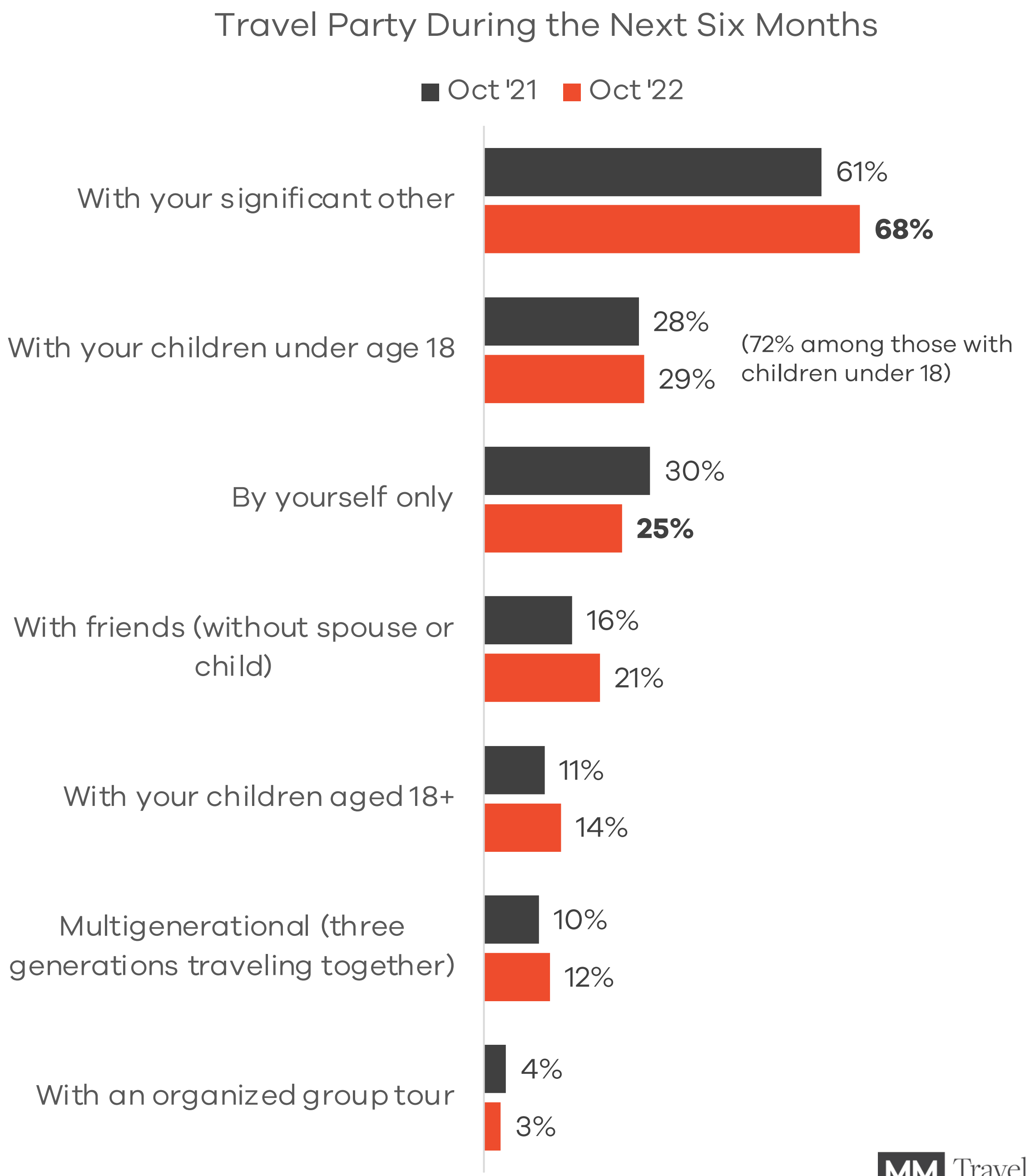
As Travelers Age, the Desire to Experience the New and Unique Is Replaced by the Urge to See Family and Relax.



Base: Active leisure travelers (Gen Zs: n=368; Millennials: n=977; Gen Xers: n=819; Boomers: n=1,043)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Couples Travel Remains the Most Common Form of Travel.



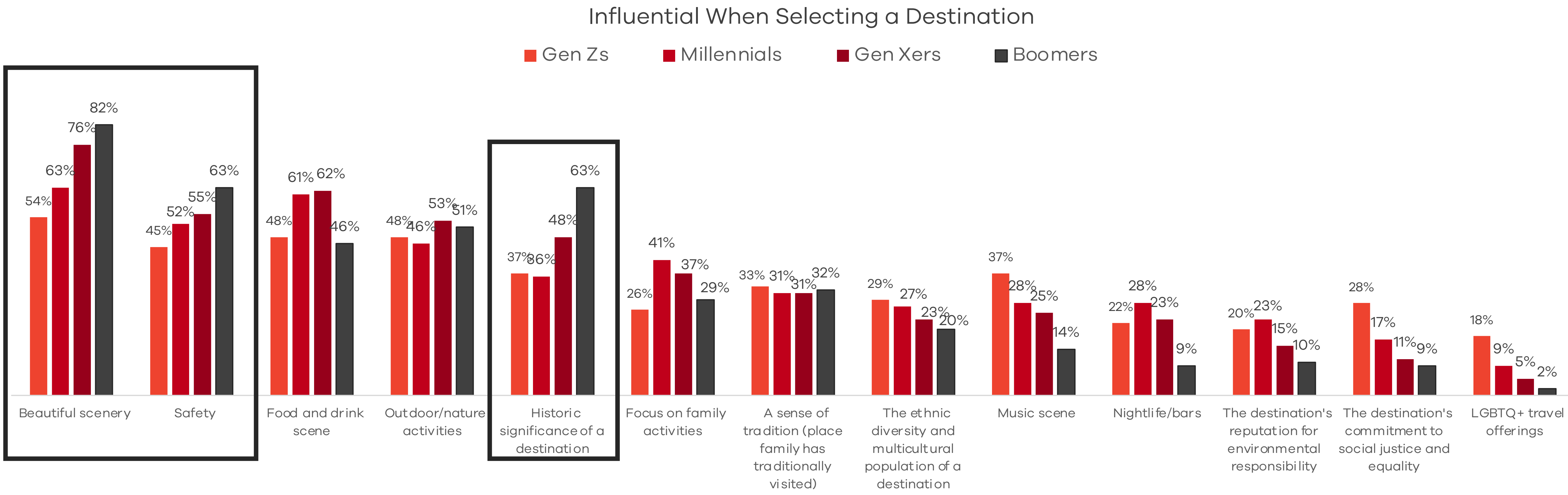
Base: Active leisure travelers who intend to travel during the next six months (n=2,637)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

Scenery, Safety, and the Food and Drink Scene Are the Most Influential Factors When Selecting a Destination, All Increasing From Last Year.

Influential When Selecting a Destination (Top-2 Box)	**Oct '21**	**Oct '22**
Beautiful scenery	64%	**72%**
Safety	53%	**56%**
Food and drink scene	49%	**54%**
Outdoor/nature activities	42%	**49%**
Historic significance of a destination	40%	**48%**
Focus on family activities	28%	**34%**
A sense of tradition (place family has traditionally visited)	27%	**32%**
The ethnic diversity and multicultural population of a destination	20%	**24%**
Music scene	24%	23%
Nightlife/bars	18%	20%
The destination's reputation for environmental responsibility	16%	16%
The destination's commitment to social justice and equality	13%	14%
LGBTQ+ travel offerings	8%	6%

Base: Active leisure travelers (n=3,338)
Source: MMGY Global's 2022 *Portrait of American Travelers®* "Winter Edition"

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



Base: Active leisure travelers (Gen Zs: n=368; Millennials: n=977; Gen Xers: n=819; Boomers: n=1,043)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Top Activities of Interest on Vacation

	Oct '21	Oct '22
Beach experiences	49%	**54%**
Historical sites	44%	**52%**
Visiting a state or national park	44%	**49%**
Shopping	41%	**47%**
Visiting a museum	39%	**46%**
Visiting a zoo or aquarium	NA	42%
Visiting a theme or amusement park	31%	**35%**
Visiting notable architectural sites	28%	**35%**
Hiking/climbing/biking/other outdoor adventures	28%	**33%**
Dining cruise	NA	32%
Guided tours with access to local experiences that are otherwise inaccessible	28%	**31%**
Attending a concert/music festival	25%	**29%**
Casino gambling	28%	27%
Dinner theater	NA	26%
Adventure travel	22%	**25%**
Nightlife	22%	**25%**
Camping	NA	25%
Spa services (massages, facials, etc.)	20%	**24%**
Exploring family's ancestry/past on a heritage vacation	22%	23%
Attending a sporting event	17%	**22%**
Film/art festivals	15%	**19%**
Water sports (waterskiing, boating/rafting)	18%	18%
Attending performing arts events	17%	18%
Playing golf	12%	13%

Base: Active leisure travelers (n=3,338)
Source: MMGY Global's 2022 *Portrait of American Travelers®* "Winter Edition"

Beach Experiences, Visiting State or National Parks, Shopping, and Museums 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	42%	48%	60%	60%
Historical sites	32%	40%	54%	67%
Visiting a state or national park	37%	41%	55%	58%
Shopping	45%	48%	51%	43%
Visiting a museum	38%	42%	46%	54%
Visiting a zoo or aquarium	34%	43%	45%	43%
Visiting a theme or amusement park	34%	40%	41%	27%
Visiting notable architectural sites	28%	30%	33%	42%
Hiking/climbing/biking/other outdoor adventures	36%	36%	38%	29%
Dining cruise	24%	30%	34%	34%
Guided tours with access to local experiences that are otherwise inaccessible	28%	26%	32%	34%
Attending a concert/music festival	20%	31%	35%	25%
Casino gambling	16%	22%	30%	32%
Dinner theater	28%	27%	26%	26%
Adventure travel (safaris, mountain climbing, trekking vacations, etc.)	21%	33%	31%	18%
Nightlife	32%	30%	28%	17%
Camping	37%	32%	28%	15%
Spa services (massages, facials, etc.)	22%	25%	31%	19%
Exploring family's ancestry/past on a heritage vacation	19%	22%	26%	24%
Attending a sporting event	13%	24%	27%	20%

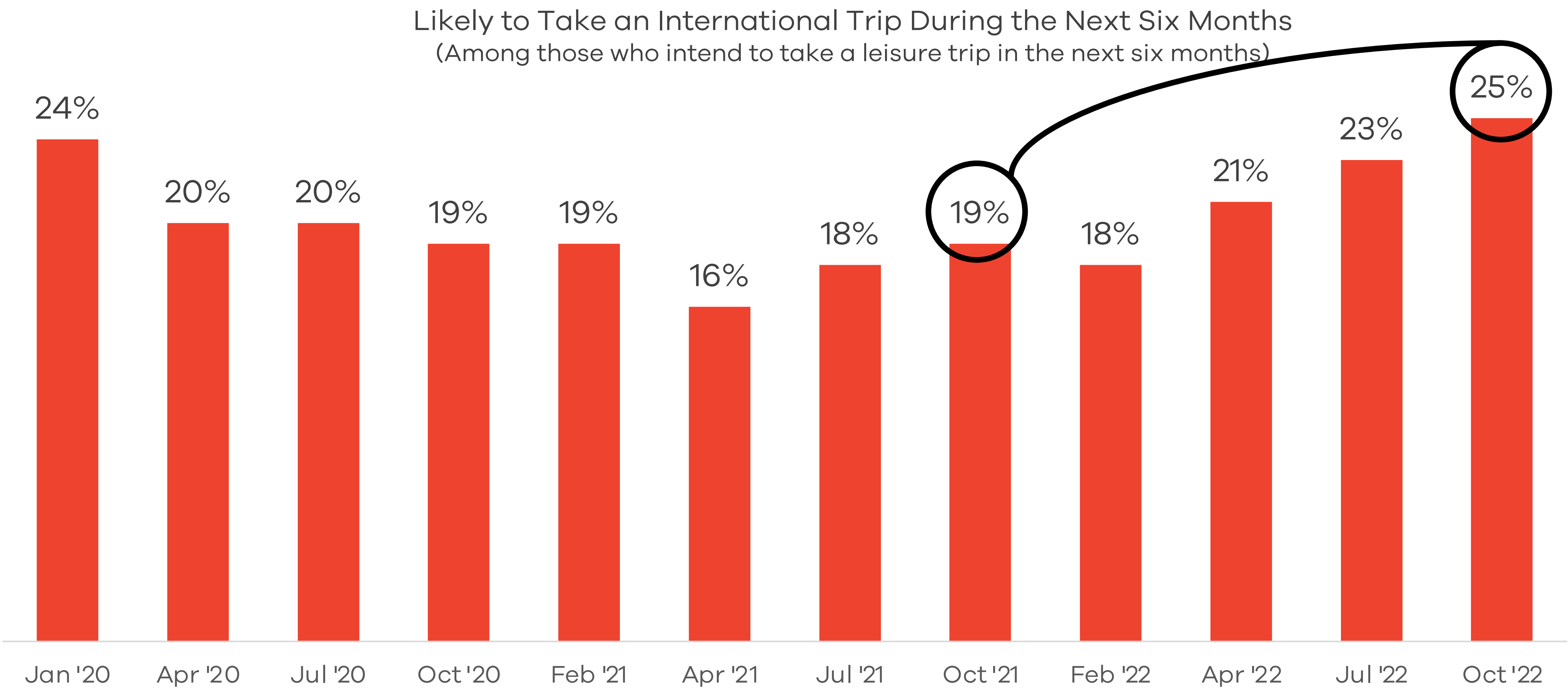
Base: Active leisure travelers (Gen Zs: n=368; Millennials: n=977; Gen Xers: n=819; Boomers: n=1,043)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

International Travel Intentions

MMGY Travel Intelligence

<u>Likelihood</u> to Take an International Trip Has Increased Significantly.



Base: Active leisure travelers who intend to travel during the next six months (n=2,637)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Measured Interest in International Travel Is Unchanged Compared to a Year Ago.

Base: Active leisure travelers (n=3,338)
Source: MMGY Global's 2022 *Portrait of American Travelers®* "Winter Edition"

75% 2021 **75%** 2022

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

Gen Zs: 84%
Millennials: 83%
Gen Xers: 73%
Boomers: 67%

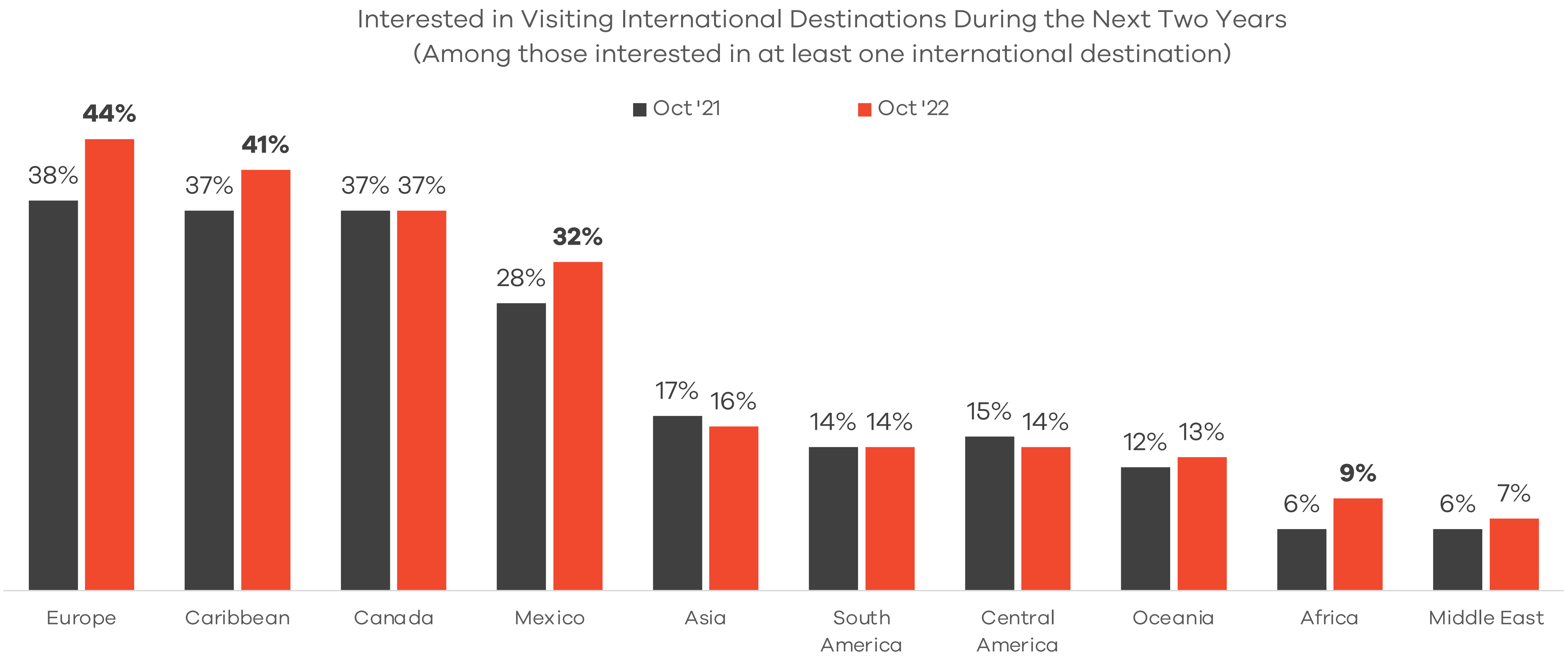
Have Kids: 82%
Don't Have Kids: 72%

Less Than $100K: 68%
More Than $100K: 83%

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

MMGY Travel Intelligence

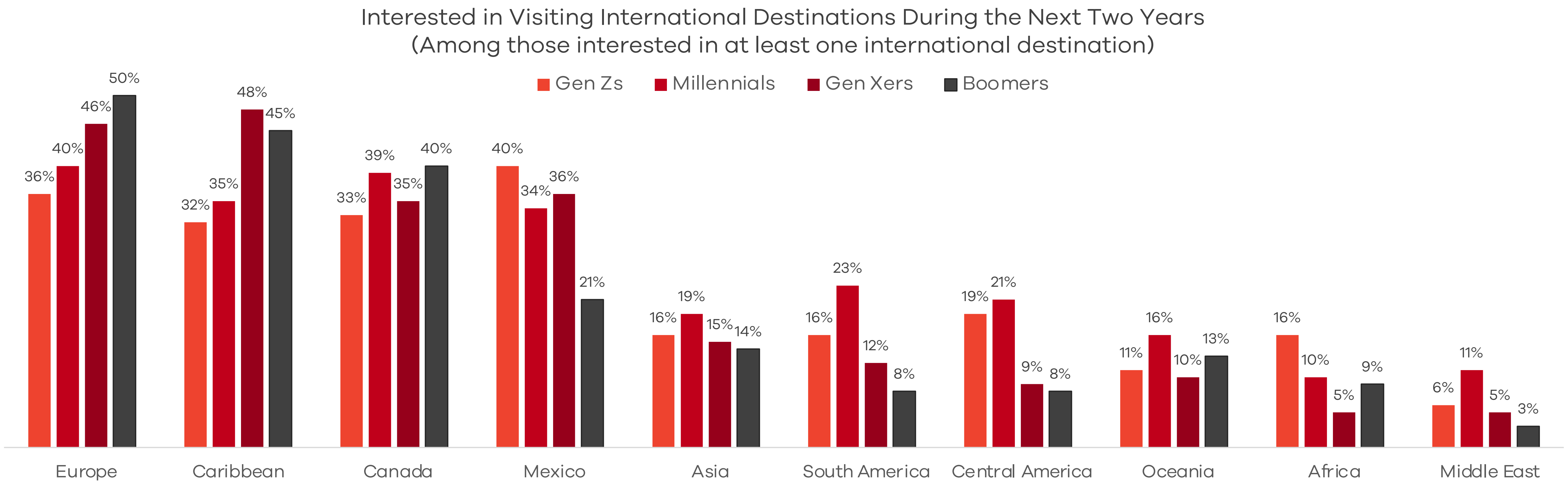
Interest in Visiting Europe, the Caribbean, Mexico and Africa Increased From One Year Ago.



Data in bold indicates a significant difference from 2021.
Base: Active leisure travelers interested in at least one international destination (n=2,612)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

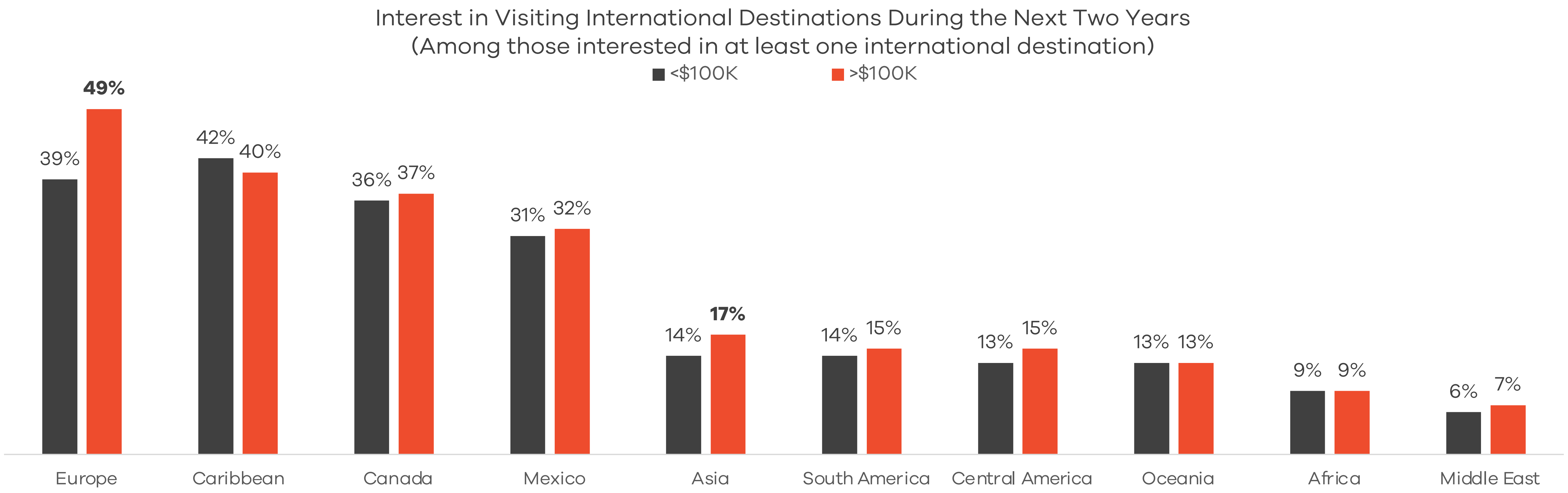
Interest in the More Popular International Destinations Increases With Age.



Base: Active leisure travelers interested in at least one international destination (Gen Zs: n=319; Millennials: n=841; Gen Xers: n=625; Boomers: n=731)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

Interest in Some International Destinations Varies by Household Income.

/ Europe and Asia are more appealing to travelers with a higher household income.



Data in bold indicates a significant difference from 2021.
Base: Active leisure travelers interested in at least one international destination (<$100K: n=1,242; >$100K: n=1,369)
Source: MMGY Global's 2022 *Portrait of American Travelers®* "Winter 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	Oct '21	Oct '22
The Bahamas	53%	54%
U.S. Virgin Islands	38%	40%
Jamaica	35%	38%
Aruba	29%	**33%**
Barbados	25%	**32%**
Puerto Rico	30%	32%
St. Maarten/St. Martin	28%	31%
Cayman Islands	30%	29%
Dominican Republic	23%	**28%**
Bermuda	22%	**27%**
British Virgin Islands	20%	22%
Antigua	18%	15%
Cuba	14%	17%
Other	3%	4%

Mexico Destinations Interested in Visiting During the Next Two Years	Oct '21	Oct '22
Cancún	55%	56%
Los Cabos/Cabo San Lucas	31%	**41%**
Mexico City	40%	37%
Puerto Vallarta	34%	36%
Cozumel	29%	29%
Riviera Maya	28%	29%
Guadalajara	23%	**14%**
Other	5%	7%

Canada Destinations Interested in Visiting During the Next Two Years	Oct '21	Oct '22
Toronto	47%	**54%**
Vancouver	46%	**51%**
Montreal	41%	**47%**
Québec	30%	**39%**
Victoria	27%	27%
Ottawa	15%	18%
Banff	14%	17%
Whistler	13%	14%
Other	9%	**6%**

Data in bold indicates a significant difference from 2021.
Base: Active leisure travelers interested in visiting the Caribbean (n=1,066), Mexico (n=823), Canada (n=960)
Source: MMGY Global's 2022 *Portrait of American Travelers®* "Winter Edition"

INTERNATIONAL TRAVEL SUMMARY

KEY TAKEAWAY:

- Likelihood to travel internationally continues 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 (25%) are likely to take an international trip during that time, up from 23% in the "Fall Edition" and 19% in winter 2021. This percentage is back up to the levels we saw in February 2020. Among all active leisure travelers, three-quarters are interested in traveling internationally during the next two years, unchanged from this time last year (75%). Interest in visiting Europe, the Caribbean, Mexico and Africa has increased from last year (Europe: up from 38% to 44%; the Caribbean: up from 37% to 41%; Mexico: up from 28% to 32%; and Africa: up from 6% to 9%).

WHAT IT MEANS:

- International travel is continuing its upward trend from over the past few waves and is now back up to pre-pandemic levels. We're also seeing that the perceived safety of international travel continues to positively increase. Despite a decrease in overall travel intentions, international travel continues to be in demand and a priority for many travelers after being off limits during the pandemic.

Respondent Demographics

MMGY Travel Intelligence

Traveler Personas

% Who Self-Identify With Each Descriptor

	2021	2022
Beach lover	38%	**46%**
Foodie	34%	**42%**
Pet lover	35%	**41%**
Family traveler	NA	37%
Outdoor adventurer	24%	**29%**
Travel bargain hunter	NA	28%
Sports fan/enthusiast	22%	**25%**
Moderate (politically)	20%	**23%**
Theme park enthusiast	NA	23%
Conservative (politically)	22%	22%
World traveler	18%	**22%**
Environmentally conscious	20%	21%
All-inclusive resort enthusiast	NA	21%
Concert/festival enthusiast	17%	**21%**
Cruise lover	NA	20%
Wine enthusiast	15%	**20%**
Liberal (politically)	16%	**19%**
Luxury traveler	15%	**18%**
Recreational cannabis user	11%	11%
Golf enthusiast	7%	**10%**
Social justice activist	8%	9%
Ski/snowboard enthusiast	5%	**7%**
Road warrior (business travel)	NA	5%

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

Respondent Demographics

	Active Leisure Travelers	Gen Zs	Millennials	Gen Xers	Boomers
Male	51%	33%	53%	51%	56%
Female	48%	63%	47%	49%	44%
Other	1%	3%	0%	0%	0%
Gen Zs	11%	100%	-	-	-
Millennials	29%	-	100%	-	-
Gen Xers	25%	-	-	100%	-
Boomers	31%	-	-	-	100%
Household income (median)	$96.9K	$70.5K	$90K	$101.7K	$106.7K
Have children under 18 at home	36%	32%	68%	43%	8%
White	73%	60%	71%	80%	75%
Hispanic	16%	32%	23%	12%	7%
African American/Black	14%	23%	14%	9%	15%
Asian	8%	9%	8%	7%	9%
Native American	2%	3%	4%	1%	2%
Pacific Islander	1%	2%	1%	2%	0%
Other	5%	8%	7%	4%	3%

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

Respondent Demographics

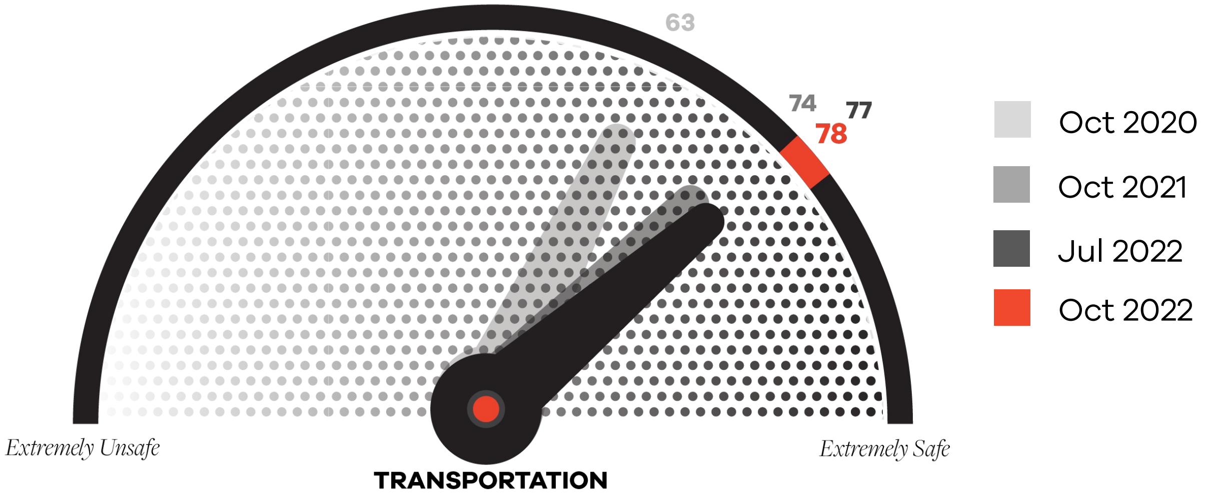
	Active Leisure Travelers	Gen Zs	Millennials	Gen Xers	Boomers
Married/living together	67%	31%	69%	70%	74%
Never married	20%	66%	24%	14%	7%
Divorced/separated/widowed	14%	3%	3%	16%	19%
4 years or less of high school	30%	40%	31%	29%	28%
1–3 years of college	29%	39%	24%	28%	30%
4 years of college	26%	13%	27%	28%	27%
Some graduate school	2%	4%	2%	2%	2%
Graduate/professional degree	12%	4%	15%	12%	12%
Employed (full time or part time)	57%	59%	80%	74%	29%
Retired	26%	0%	1%	8%	66%
Temporarily unemployed	6%	11%	8%	7%	1%
Homemaker (full time)	7%	4%	10%	11%	3%
Student	3%	26%	1%	0%	0%

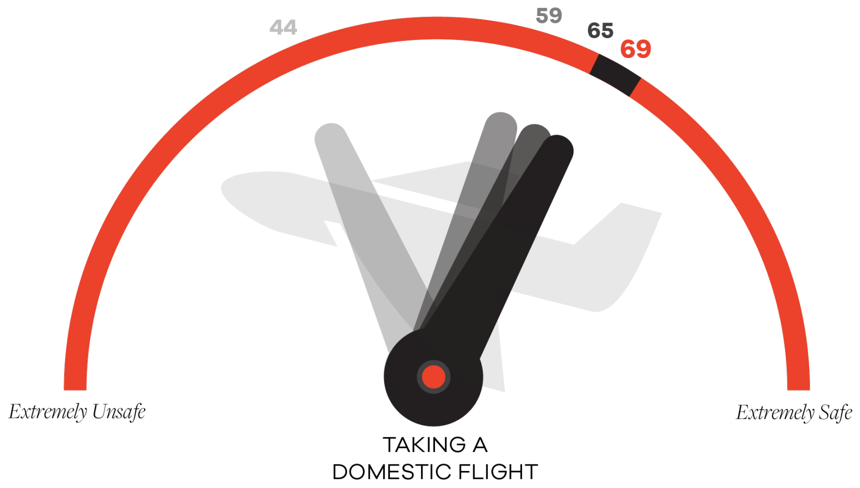
Source: MMGY Global's 2022 *Portrait of American Travelers®* "Winter Edition"

Appendix

MMGY Travel Intelligence

Perceived Safety of Transportation



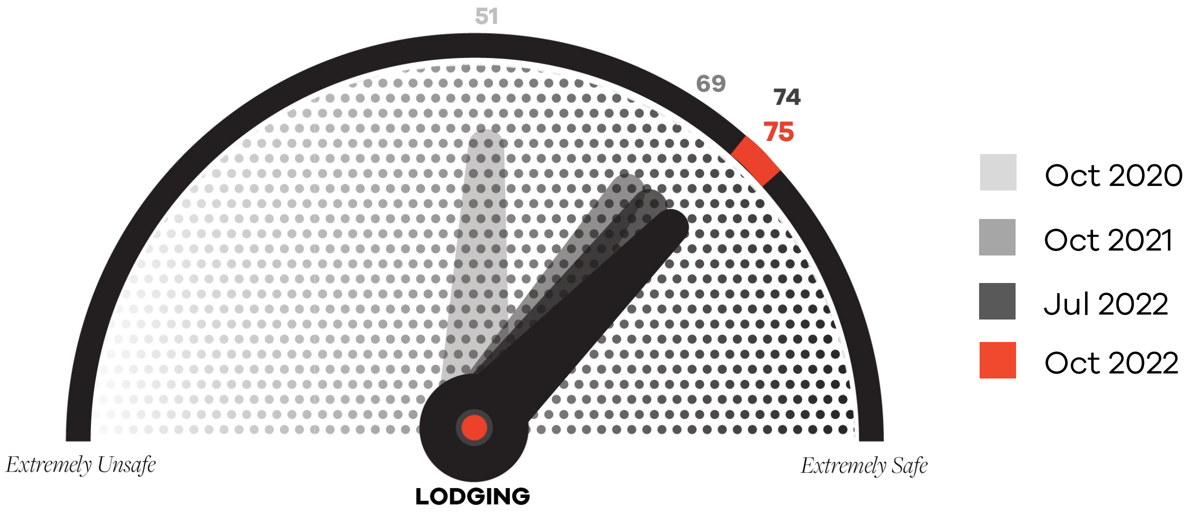


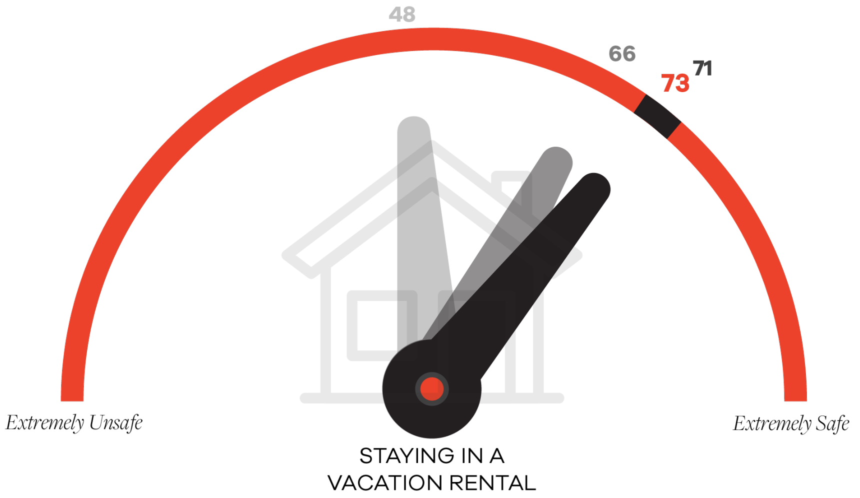
Travel Safety Barometer

Base: U.S. adults (n=4,529)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

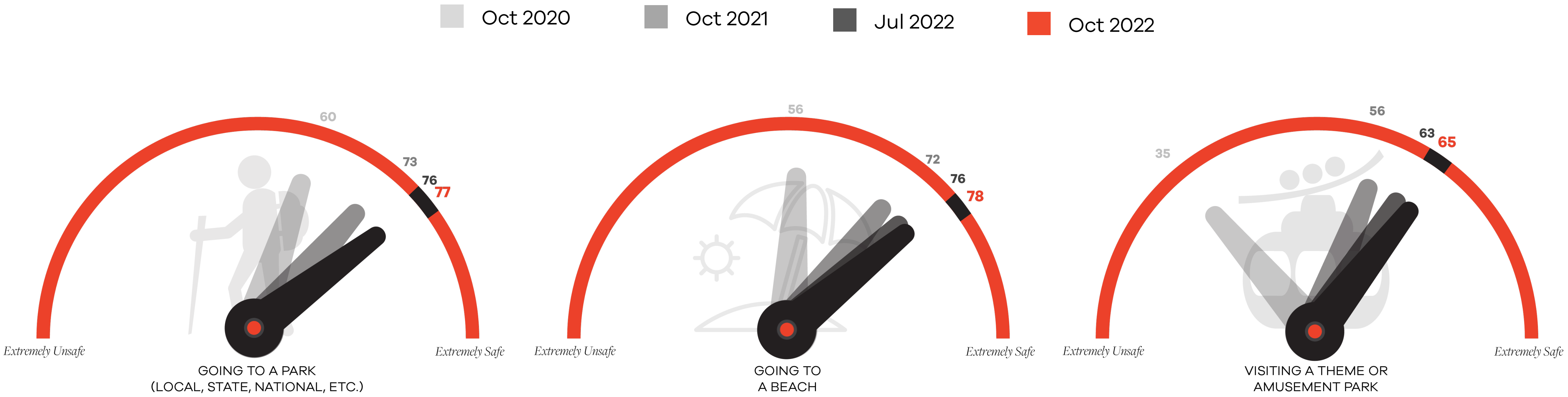
Perceived Safety of Lodging





Base: U.S. adults (n=4,529)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

Perceived Safety of Specific Activities



Base: U.S. adults (n=4,529)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

THANK YOU

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