PORTRAIT OF AMERICAN TRAVELERS®

Fall 2023

MMGY Travel Intelligence

Table of Contents

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 4,515 U.S. adults in August 2023.

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 3,294 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.

The error interval of the statistical estimates appearing in this report (for n=3,294) is +/- 1.68% at the 95% level of confidence.

Generation	Age	% of Respondents
Gen Zers	18–24	12%
Millennials	25–40	28%
Gen Xers	41–56	24%
Boomers	57–75	32%
Silent/GI	76+	4%

Key Insights

Key Insights

Traveler Outlook

- With the summer travel season coming to an end, we're seeing short-term travel intentions decrease slightly from last wave. Despite this decrease, we're seeing travel intentions in the next 12 months on par with reported intentions this time last year (2022: 72%, 2023: 73%).
- As we've seen in recent waves, travel spending intentions in the next 12 months are up from this time last year despite travelers planning to take a similar number of trips during that time. Nearly two-thirds (63%) of active leisure travelers reported increasing their travel budgets in the next 12 months compared to recent years, with the rising costs of travel predominantly contributing to this increase. More than half are planning to spend more because they expect attractions, food and beverages (55%), and accommodations (53%) to cost more.

Where People Want to Visit

- Although still top destinations of interest, nearly all Hawaiian destinations displayed decreases in interest from last year. Despite these decreases, interest in the state as a whole was unchanged from this time last year. This survey was fielded in mid-August after the wildfires in Maui started; potentially contributing to these decreases in interest as tourists were asked to refrain from visiting while the destination recovered.

Culinary Travel

- The influence of the culinary scene in a destination (54%) is up from last year (50%), with Millennials (62%) and those with children (62%) being the most influenced.
- Authentic cuisine eaten by locals (53%) continues to garner the most interest among travelers but the percentage of those interested in street food (up from 39% to 44%), cooking classes (up from 13% to 15%) and vegetarian/vegan (up from 8% to 11%) culinary experiences has increased from last year.

Key Insights

Culinary Travel (continued)

- Millennials (62%) prioritize culinary experiences on vacation, more so than the other generations (Gen Zers: 59%, Gen Xers: 56%, Boomers: 42%).
- Recommendations from friends and family (63%) is the most influential source when choosing where to eat and drink in a destination, followed by digital media (37%), concierge recommendations (37%) and social media (35%).

Holiday Travel

- Winter holiday travel plans are down slightly from last year with 34% of U.S. adults intending to travel for the winter holidays, down from 36% in 2022. More than half of those planning to travel for the winter holidays are planning to do so for Christmas, Hanukkah or Kwanzaa (58%), while half are planning to do so for Thanksgiving (51%).
- Gen Zers (76%) and Millennials (77%) are more likely to travel for the winter holidays than older generations (Gen Xers: 57%, Boomers: 36%).
- These travelers are predominantly planning to visit the homes of friends and family (43%) or take a family leisure vacation (33%), and the majority are planning to travel less than 500 miles from home (55%) for these trips.

Cruising

- Half of active leisure travelers are interested in taking an ocean cruise (52%) or river cruise (50%) during the next two years, while 40% are interested in taking an expedition cruise.
- Ocean cruises are more appealing to Gen Zers, Millennials and Gen Xers compared to Boomers, while river cruises are more appealing to Gen Xers and Boomers than younger travelers. Expedition cruises are more appealing to Millennials and Gen Xers than the remaining generations.
- The most popular ocean cruise line brands are Royal Caribbean (48%), Carnival Cruises (39%) and Norwegian Cruise Lines (35%), with the most popular regions to cruise being the Caribbean (84%), the Mediterranean (71%), Europe (70%) and the Pacific Ocean (70%).
- The most popular river cruise line brand is Viking Cruises (46%), followed by American Cruise Lines (25%) with the most popular regions to cruise being the United States (81%), Europe (73%) and Canada (68%).

Key Insights

Cruising (continued)

- The most popular expedition cruise line brands are Silversea Cruises (22%), Seabourn Expeditions (21%) and Atlas Ocean Voyages (19%), with the most popular regions to cruise being Alaska (75%), Norway (68%) and Iceland (65%).
- Safety/cleanliness standards (85%), quality of food (83%) and price (83%) continue to be the most influential factors when selecting a cruise line.

Vacation Motivators and Activities

- One-third of active leisure travelers have used ChatGPT or another AI tool for travel planning (34%), to research flight options (42%), to generate travel ideas and inspiration (37%), and to suggest destinations of interest (37%).
- As would be expected, Gen Zers (59%) and Millennials (57%) are significantly more likely to turn to AI for travel planning than older generations.
- Beautiful scenery (70%) continues to be the most influential feature when selecting a destination, increasing in influence from last year (65%). It is particularly influential to older generations and those without children.
- Younger generations and those with children are more influenced by the music scene and nightlife in a destination as well as its reputation for environmental responsibility and commitment to social justice than older generations and those without children.

International Travel Intentions

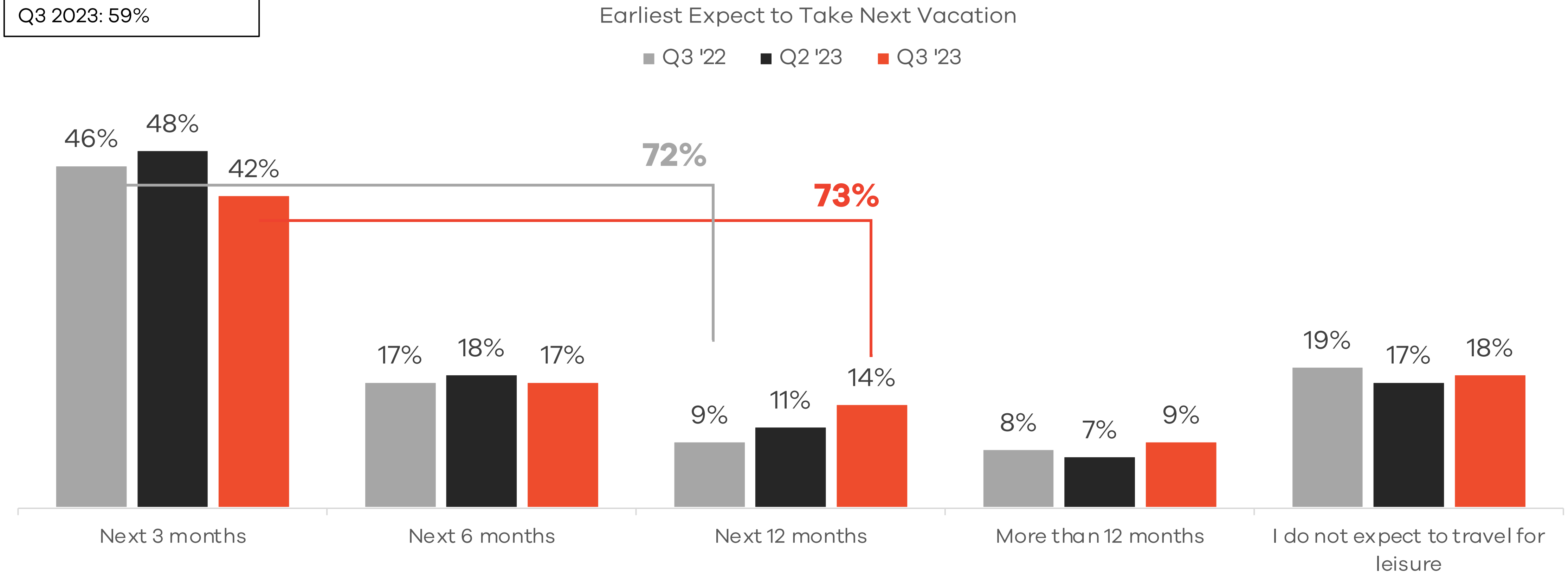
- Interest in international travel remains strong with 8 in 10 active leisure travelers interested in traveling internationally within the next two years (79%), unchanged from this time last year (79%).
- Interest in visiting Europe, Canada, Asia, Oceania and Africa have increased from last year. Popular destinations like Europe continue to be more appealing to older travelers, while less popular destinations South America and Central America are more appealing to younger travelers.

Travel Outlook Snapshot

MMGY Travel Intelligence

With the Summer Travel Season Coming to an End, Short-Term Travel Intentions Have Decreased Slightly – but Intentions Are Unchanged From This Time Last Year.

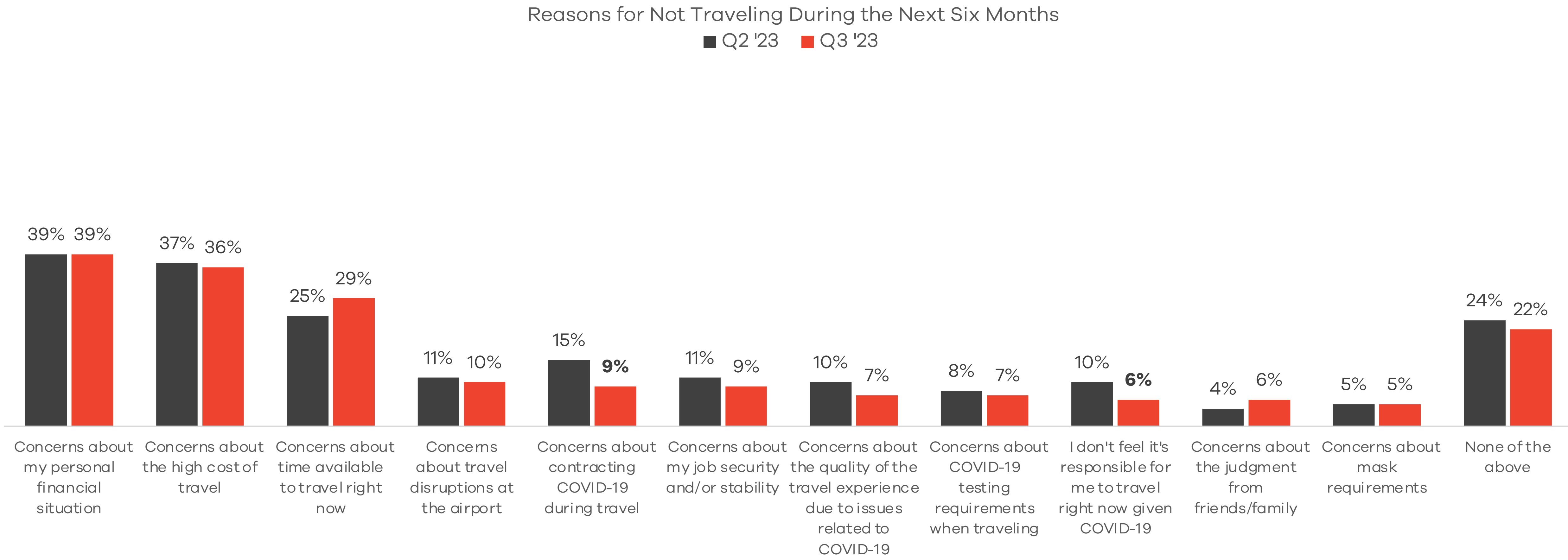
<u>Sum of Next 6 Months</u>
Q2 2023: 66%
Q3 2023: 59%



Base: U.S. adults (n=4,515)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Fall Edition"

MMGY Travel Intelligence

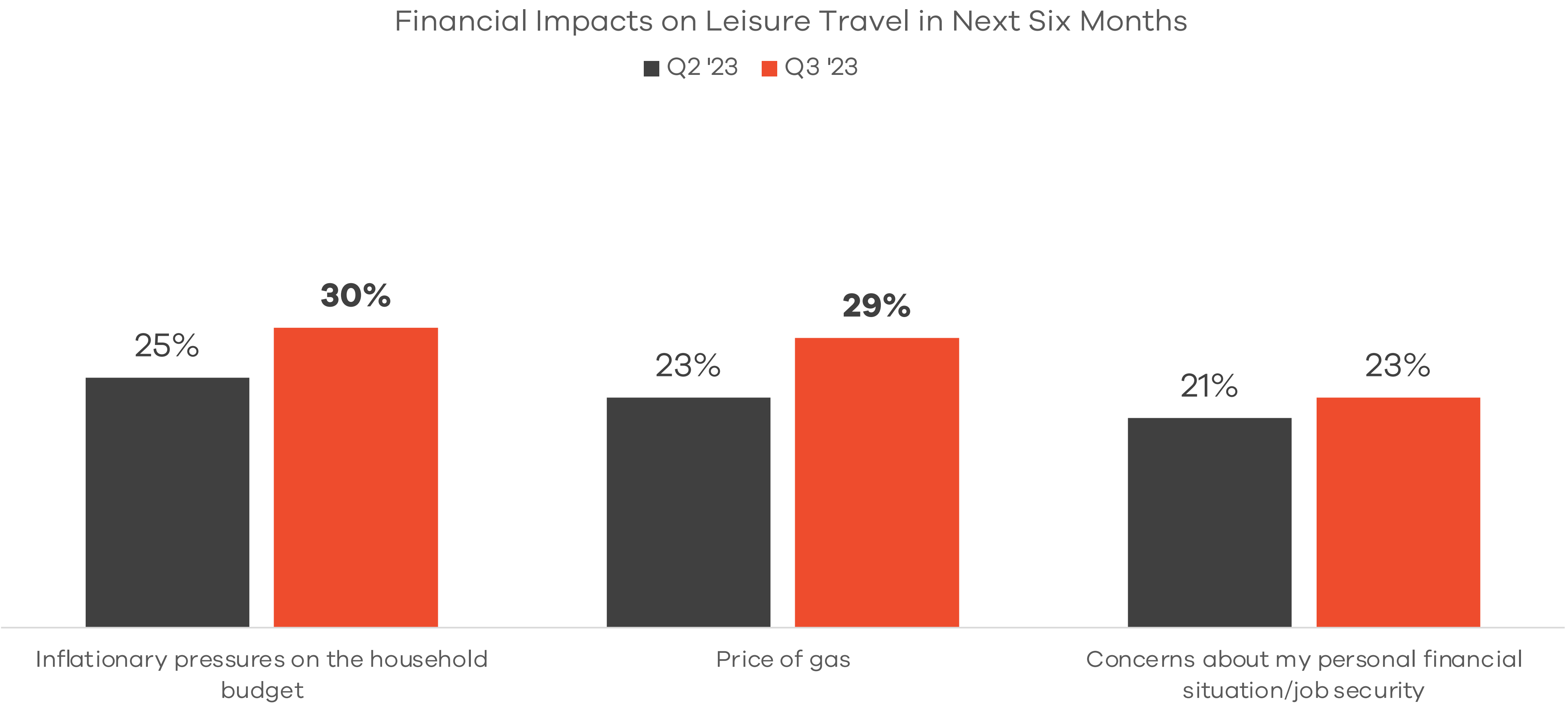
Concerns About COVID-19 Display the Only Significant Changes From Last Wave, Decreasing in Impact on Short-Term Travel Decisions for Those Not Planning to Travel.



Data in bold indicates a statistically significant difference from Q2 2023.
Base: Active leisure travelers without travel plans during the next six months (n=644)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Fall Edition"

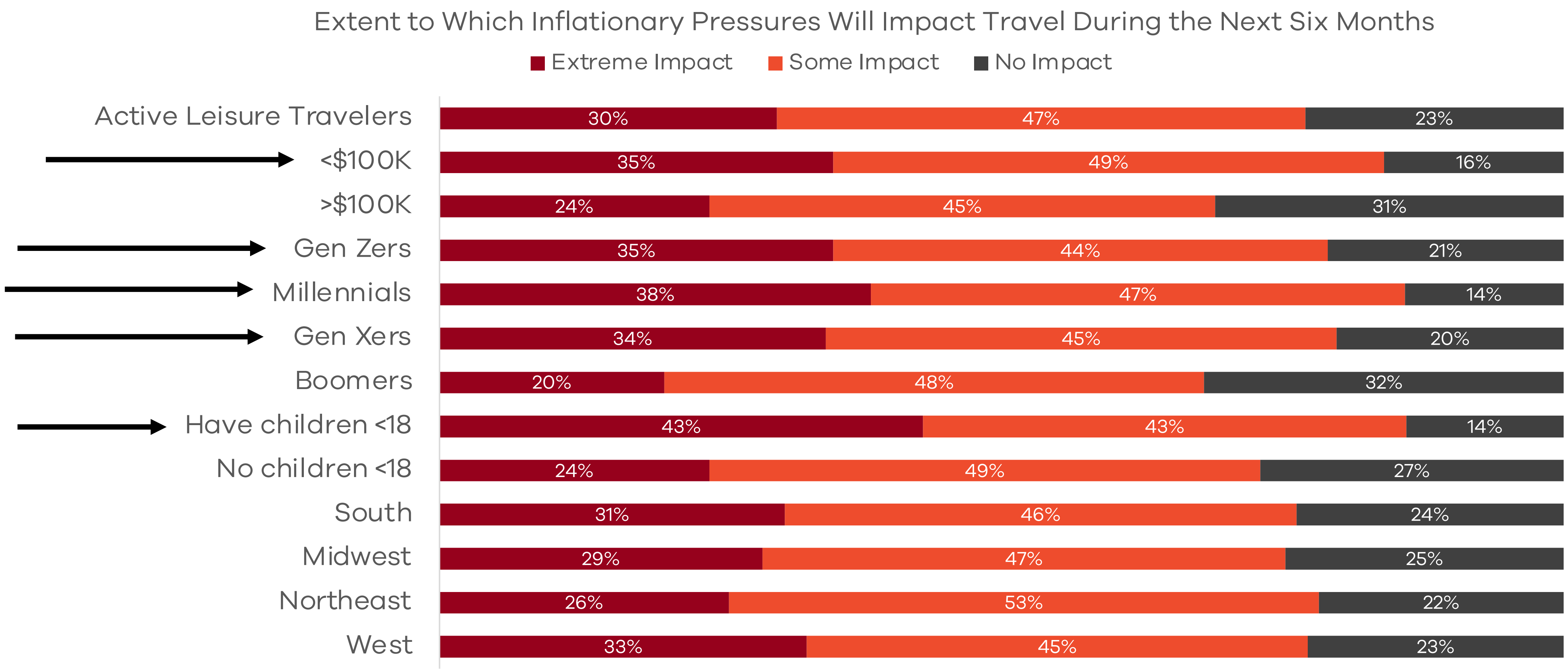
MMGY Travel Intelligence

The Impacts of Inflationary Pressures and the Price of Gas on Leisure Travel Have Increased Again After Displaying Decreases Last Wave.



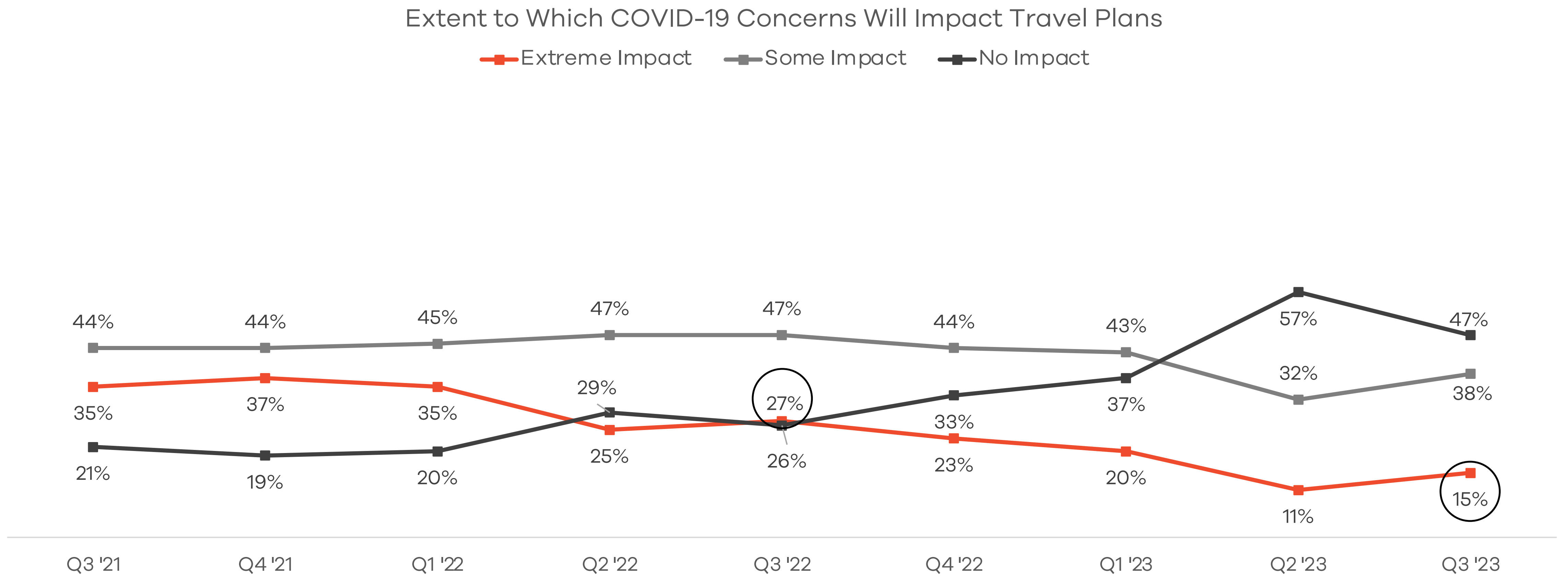
Data in bold indicates a statistically significant difference from Q2 2023.
Base: Active leisure travelers (n=3,294)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Inflationary Pressures Are More Likely to Have an Extreme Impact on Gen Zers, Millennials and Gen Xers, Those With Lower Household Incomes, and Families.



Base: Active leisure travelers (n=3,294)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

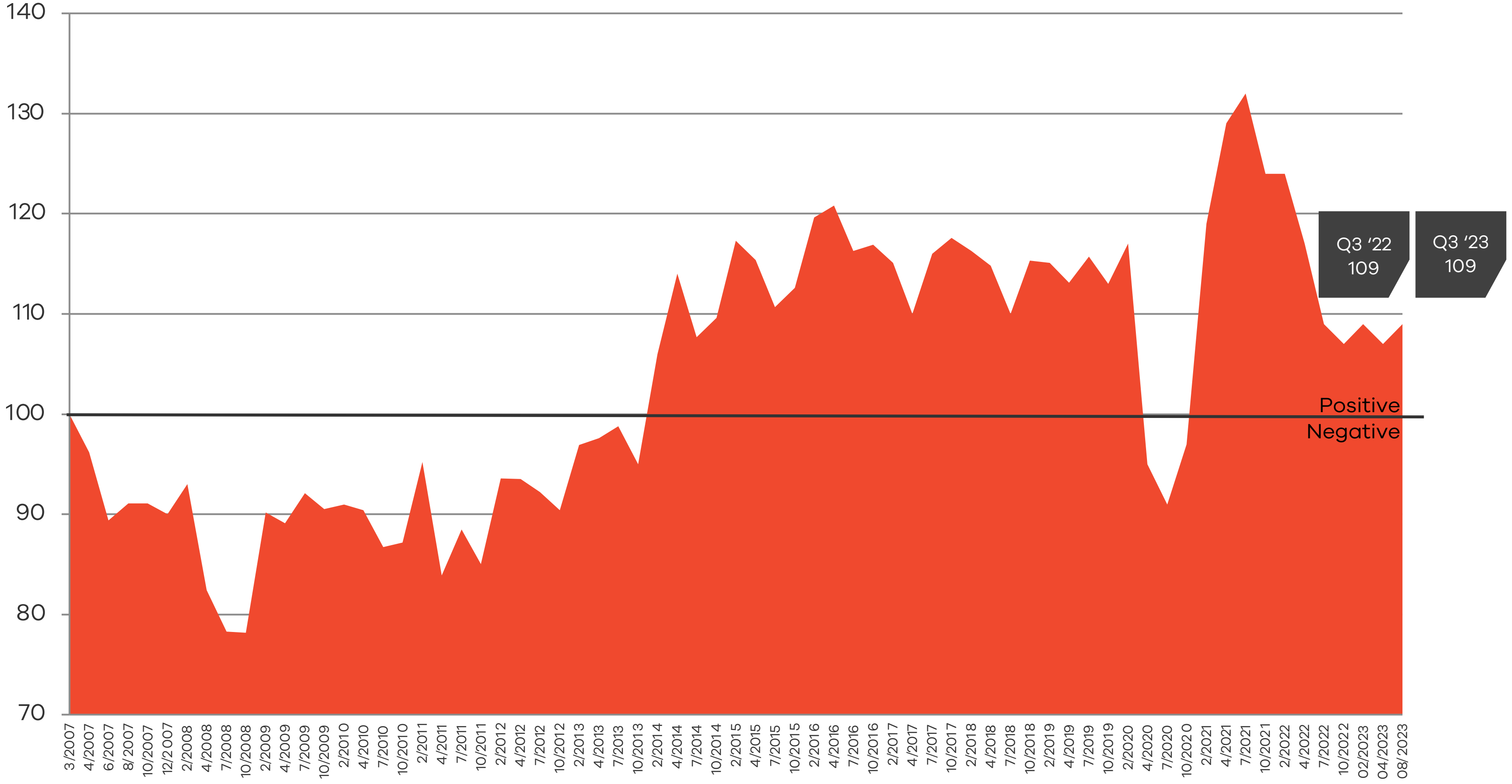
Despite a Slight Increase From Last Wave, the Impact of COVID-19 on Travel Plans Continues to Be the Lowest It's Been in Recent Waves.



Base: Active leisure travelers (n=3,294)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Fall Edition"

MMGY Travel Intelligence

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



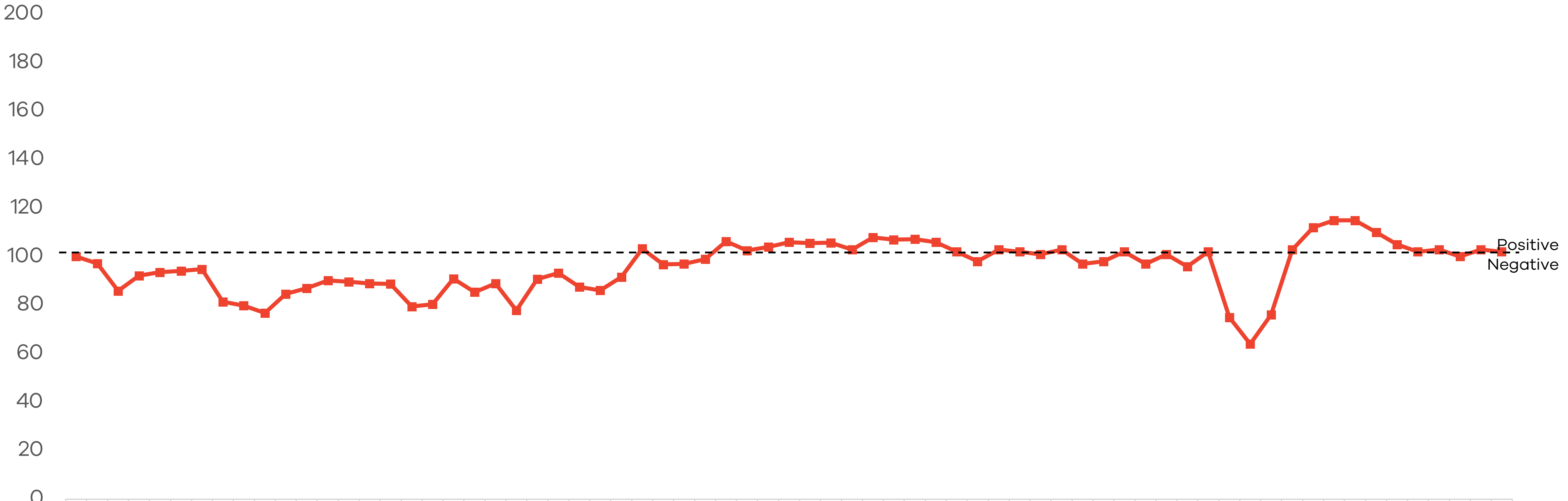
The Traveler Sentiment Index™ (TSI) consists of six variables, including interest in travel, time available for travel, personal finances available for travel, affordability of travel, quality of service and safety of travel. It provides a glimpse into how U.S. adults are feeling about travel this year 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=4,515)
Source: MMGY Global's *travelhorizons*™/2023 *Portrait of American Travelers*® "Fall 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	Oct 10	Feb 11	Apr 11	Jul 11	Oct 11	Feb 12
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	91

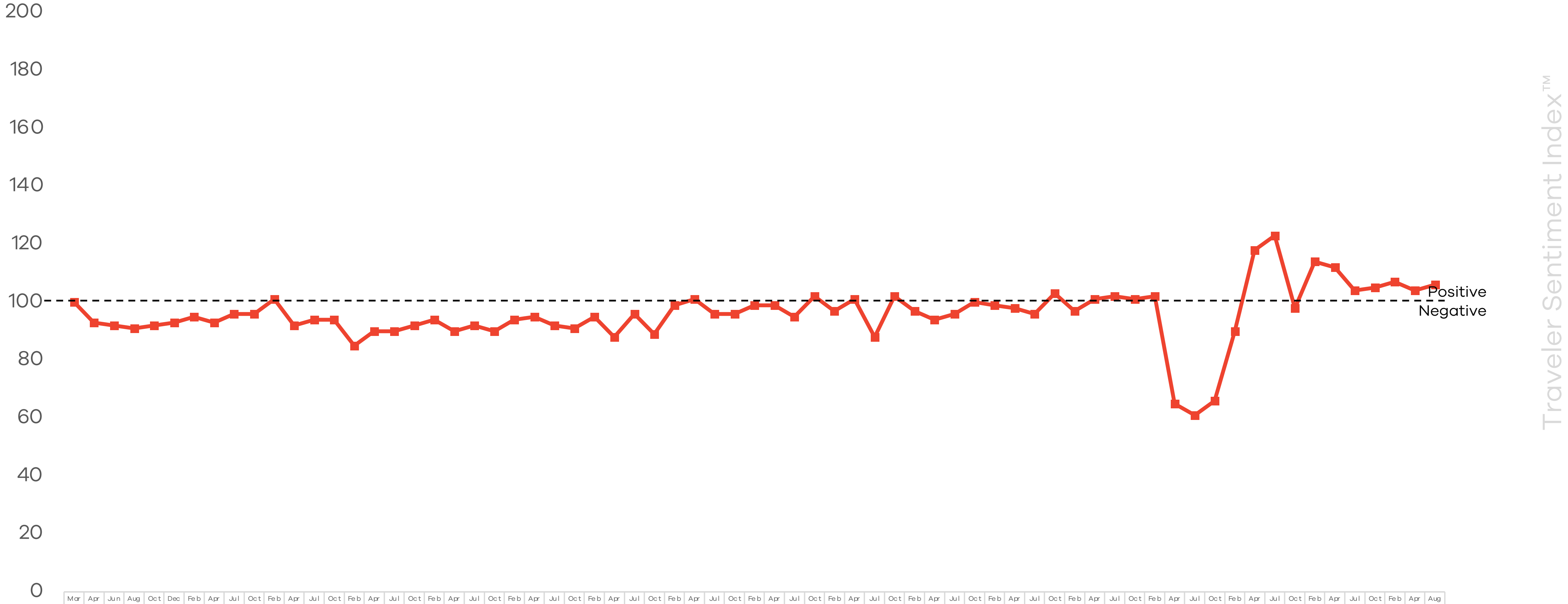
	Apr 12	Jul 12	Oct 12	Feb 13	Apr 13	Jul 13	Oct 13	Feb 14	Apr 14	Jul 14	Oct 14	Feb 15	Apr 15	Jul 15	Oct 15	Feb 16	Apr 16	Jul 16	Oct 16	Feb 17	Apr 17	Jul 17	Oct 17
U.S. Adults	93	88	86	92	103	97	97	99	106	103	104	106	106	106	103	108	107	107	106	102	98	103	102

	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	Feb 23	Apr 23	Aug 23
U.S. Adults	101	103	97	98	102	97	101	96	102	75	64	76	103	112	115	115	110	105	102	103	100	103	102

Traveler Sentiment Index™

Source: MMGY Global's 2023 *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	Oct 11	Feb 12
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	94

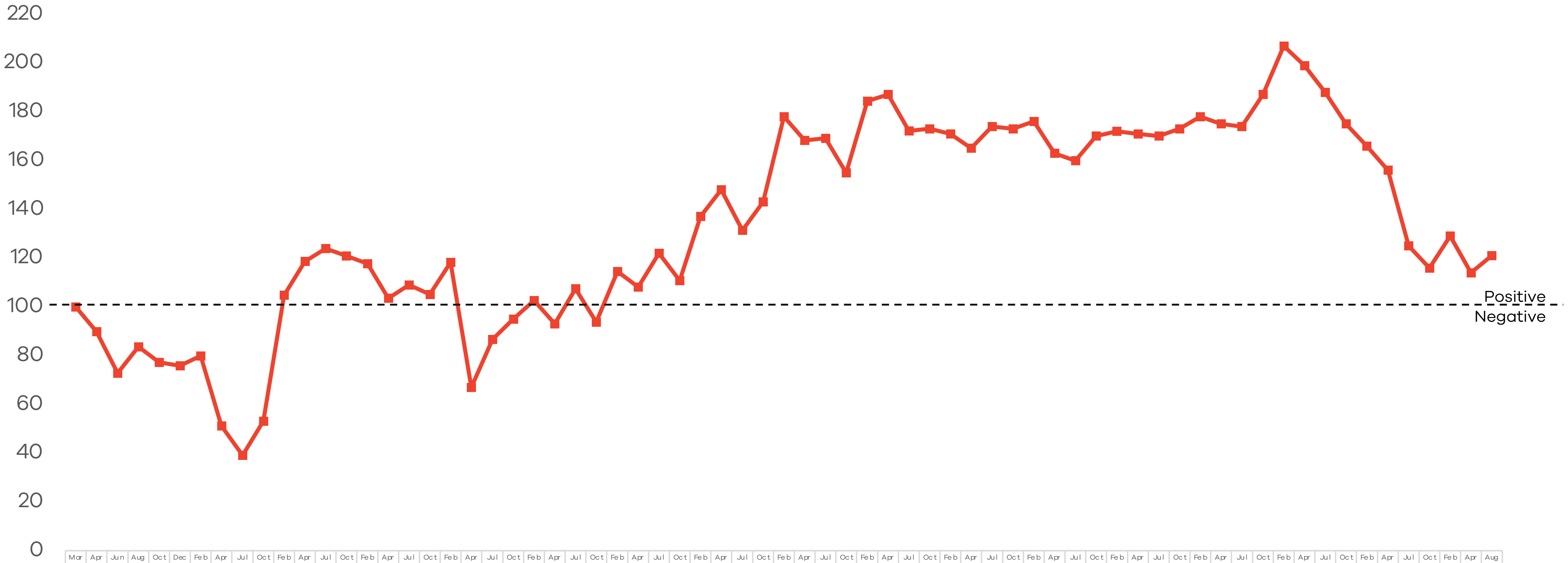
	Apr 12	Jul 12	Oct 12	Feb 13	Apr 13	Jul 13	Oct 13	Feb 14	Apr 14	Jul 14	Oct 14	Feb 15	Apr 15	Jul 15	Oct 15	Feb 16	Apr 16	Jul 16	Oct 16	Feb 17	Apr 17	Jul 17	Oct 17
U.S. Adults	95	92	91	95	88	96	89	99	101	96	96	99	99	95	102	97	101	88	102	97	94	96	100

	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	Feb 23	Apr 23	Aug 23
U.S. Adults	99	98	96	103	97	101	102	101	102	65	61	66	90	118	123	98	114	112	104	105	107	104	106

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall 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	Oct 11	Feb 12
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	103

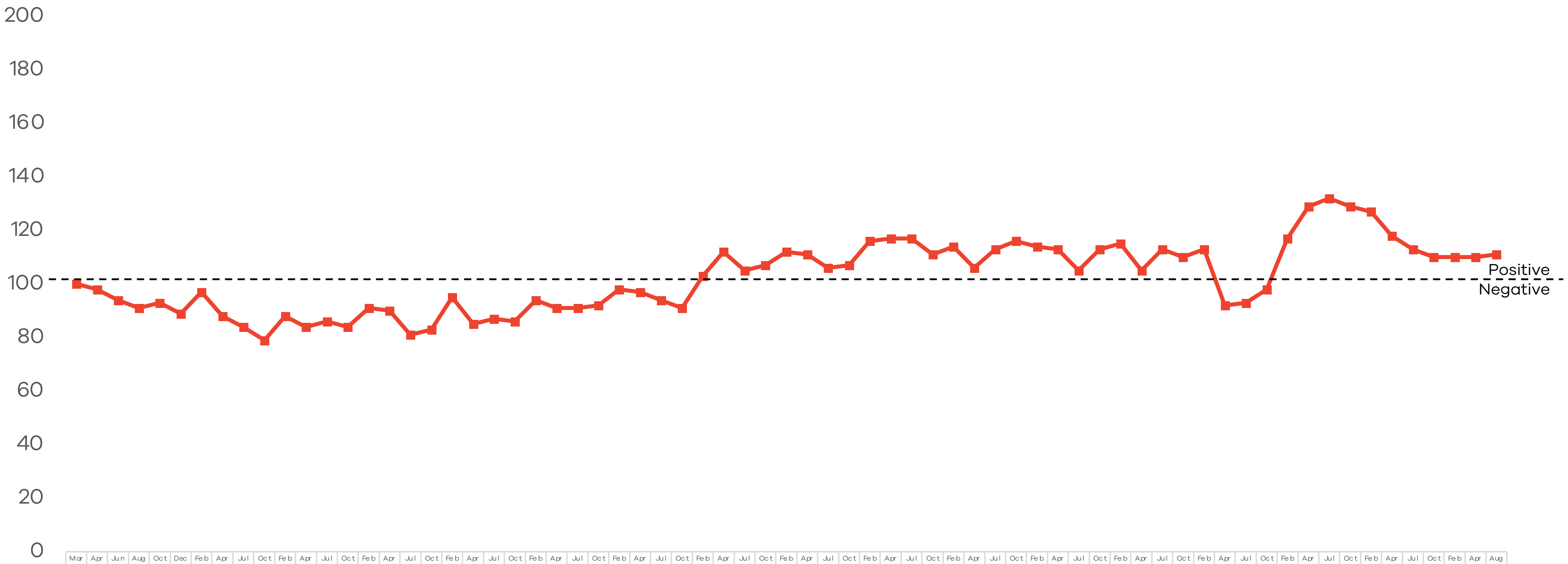
	Apr 12	Jul 12	Oct 12	Feb 13	Apr 13	Jul 13	Oct 13	Feb 14	Apr 14	Jul 14	Oct 14	Feb 15	Apr 15	Jul 15	Oct 15	Feb 16	Apr 16	Jul 16	Oct 16	Feb 17	Apr 17	Jul 17	Oct 17
U.S Adults	93	107	94	115	108	122	111	137	148	131	143	178	168	169	155	184	187	172	173	171	165	174	173

	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	Feb 23	Apr 23	Aug 23
U.S Adults	176	163	160	170	172	171	170	173	178	175	174	187	207	199	188	175	166	156	125	116	129	114	121

Traveler Sentiment Index™

Source: MMGY Global's 2023 *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	Jul 10	Oct 10	Feb 11	Apr 11	Jul 11	Oct 11	Feb 12
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	94

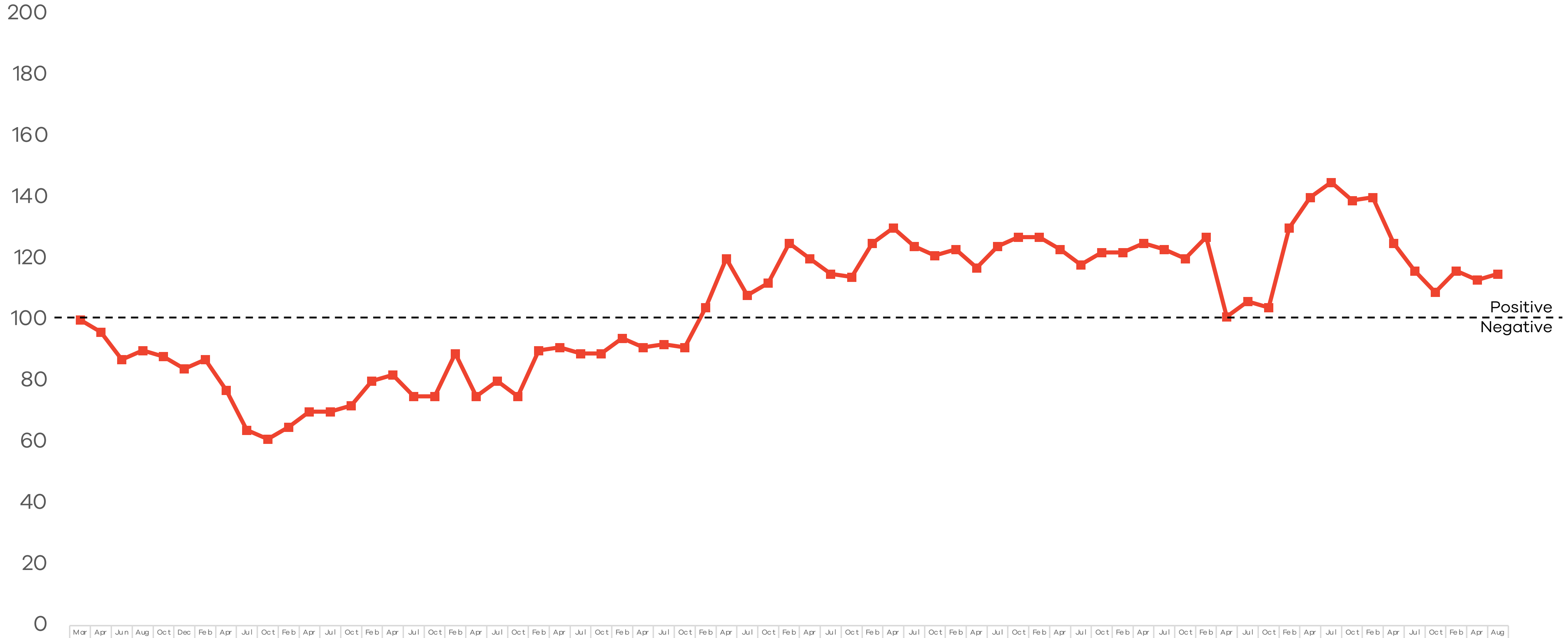
	Apr 12	Jul 12	Oct 12	Feb 13	Apr 13	Jul 13	Oct 13	Feb 14	Apr 14	Jul 14	Oct 14	Feb 15	Apr 15	Jul 15	Oct 15	Feb 16	Apr 16	Jul 16	Oct 16	Feb 17	Apr 17	Jul 17	Oct 17
U.S. Adults	91	91	92	98	97	94	91	103	112	105	107	112	111	106	107	116	117	117	111	114	106	113	116

	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	Feb 23	Apr 23	Aug 23
U.S. Adults	114	113	105	113	115	105	113	110	113	92	93	98	117	129	132	129	127	118	113	110	110	110	111

Traveler Sentiment Index™

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall 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	Feb 12
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	90

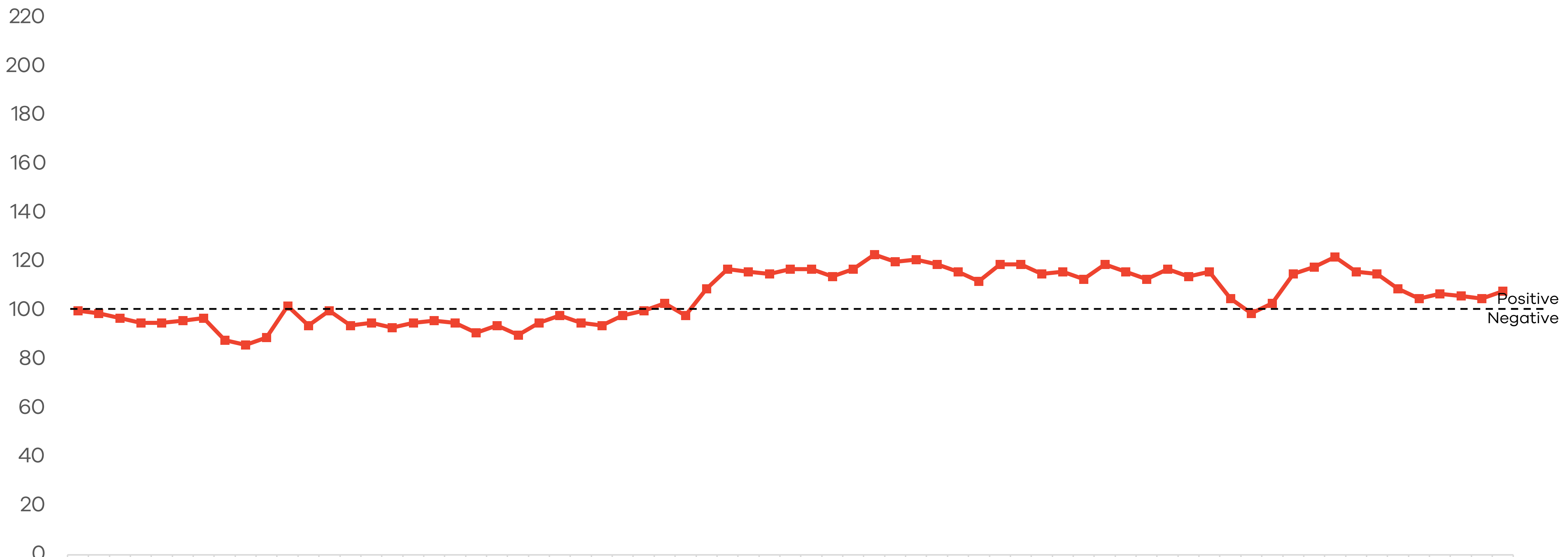
	Apr 12	Jul 12	Oct 12	Feb 13	Apr 13	Jul 13	Oct 13	Feb 14	Apr 14	Jul 14	Oct 14	Feb 15	Apr 15	Jul 15	Oct 15	Feb 16	Apr 16	Jul 16	Oct 16	Feb 17	Apr 17	Jul 17	Oct 17
U.S. Adults	91	89	89	94	91	92	91	104	120	108	112	125	120	115	114	125	130	124	121	123	117	124	127

	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	Feb 23	Apr 23	Aug 23
U.S. Adults	127	123	118	122	122	125	123	120	127	101	106	104	130	140	145	139	140	125	116	109	116	113	115

Traveler Sentiment Index™

Source: MMGY Global's 2023 *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
U.S. Adults	100	99	97	95	95	96	97	88	86	89	102	94	100	94

	Feb 10	Apr 10	Jul 10	Oct 10	Feb 11	Apr 11	Jul 11	Oct 11	Feb 12	Apr 12	Jul 12	Oct 12	Feb 13	Apr 13
U.S. Adults	95	93	95	96	95	91	94	90	95	98	95	94	98	100

	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	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
U.S. Adults	116	112	119	119	115	116	113	119	116	113	117	114	116	105

	Jul 20	Oct 20	Feb 21	Apr 21	Jul 21	Oct 21	Feb 22	Apr 22	Jul 22	Oct 22	Feb 23	Apr 23	Aug 23
U.S. Adults	99	103	115	118	122	116	115	109	105	107	106	105	108

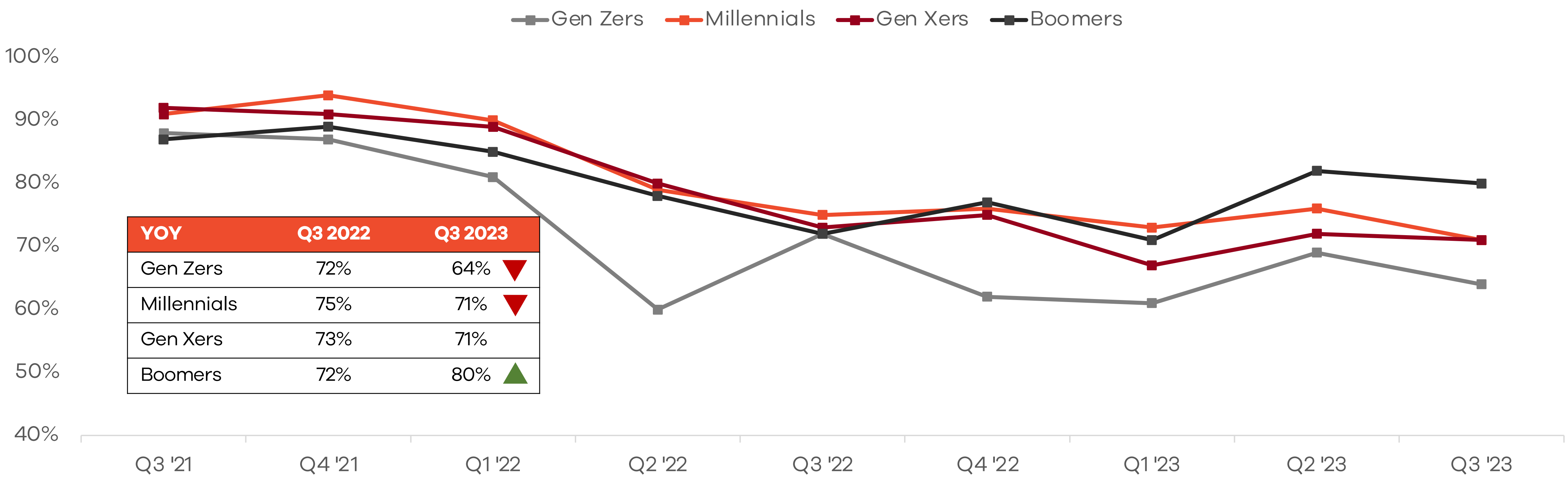
Traveler Sentiment Index™

Source: MMGY Global's 2023 *Portrait of American Travelers®* "Fall Edition"

MMGY Travel Intelligence

Gen Zers and Millennials Are Experiencing a Decrease in Travel Intentions From Last Year, While Boomers Display an Increase.

Plan to Travel for Leisure in the Next 12 Months

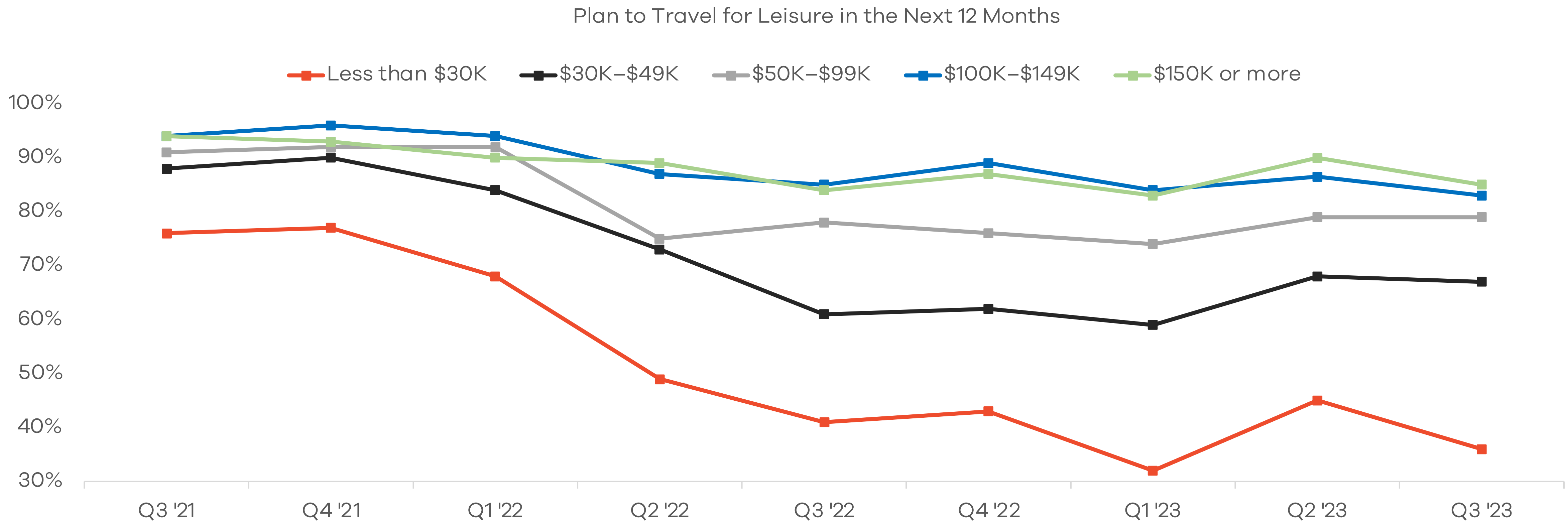


YOY	Q3 2022	Q3 2023
Gen Zers	72%	64% ▼
Millennials	75%	71% ▼
Gen Xers	73%	71%
Boomers	72%	80% ▲

Base: U.S. adults (Gen Zers: n=641; Millennials: n=1,301; Gen Xers: n=1,090; Boomers: n=1,326)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Fall Edition"

MMGY Travel Intelligence

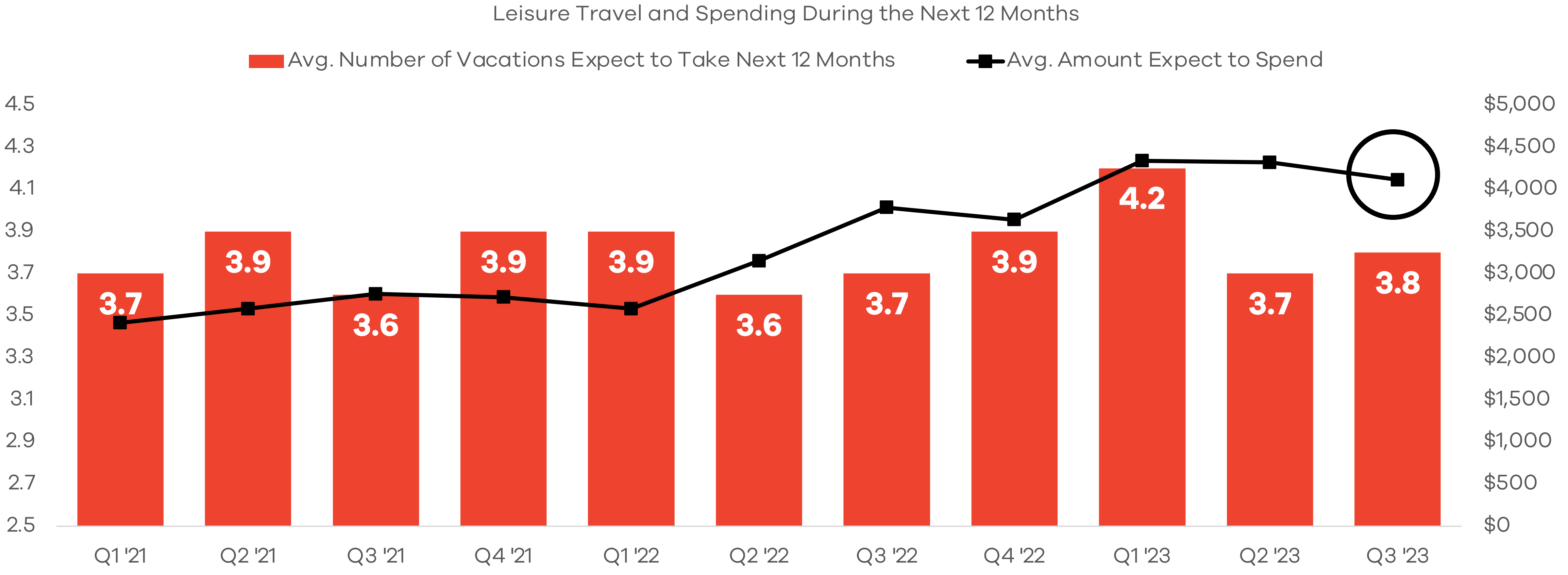
Compared to Last Year, Travel Intentions of Those With Higher Household Incomes Are Unchanged, While Those With Lower Incomes Are Down.



Base: U.S. adults (<$30K: n=699; $30K–$49K: n=588; $50K–$99K: n=1,289; $100K–$149K: n= 827; $150K+: 1,111)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

MMGY Travel Intelligence

Although Travelers Are Planning to Take the Same Number of Leisure Trips in the Next 12 Months, Their Expected Travel Spend During That Time Is up Significantly.



Base: Active leisure travelers (n=3,294)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

MMGY Travel Intelligence

Many Travelers Have Increased Their Travel Budget Because of the Increasing Costs Associated With Travel Now Compared to Recent Years.

63%

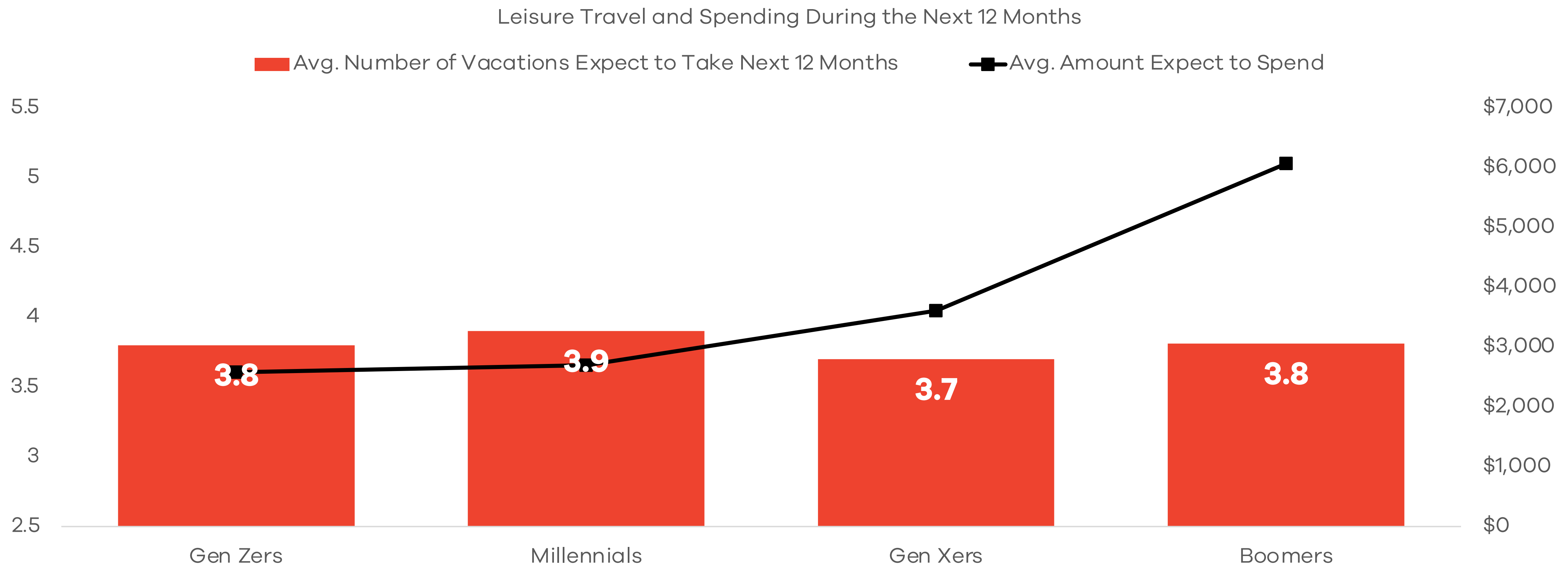
of active leisure travelers plan to spend more on travel in the next 12 months than they have spent in either of the past two years.

Factors That Have Contributed to Increase in Travel Budget	Q3 '23
I expect to spend more because I expect the attractions, food and beverages in vacation destinations to cost more now than they did a few years ago	55%
I expect to spend more because vacation lodging/accommodations seem to cost more now than they did a few years ago	53%
I expect to spend more because the price of gas is higher now than it was the past few years	46%
I expect to spend more because airline travel seems to cost more now than it did a few years ago	43%
I expect to spend more because I have more reasons I need to travel (e.g., special events, family visits, etc.) in the next 12 months than I have in recent years	27%
I expect to spend more because I simply have more money available in my budget and this is how I choose to spend it	21%

Base: Active leisure travelers (n=3,294); those who plan to spend more on travel in the next 12 months than they have spent in either of the past two years (n=2,079)

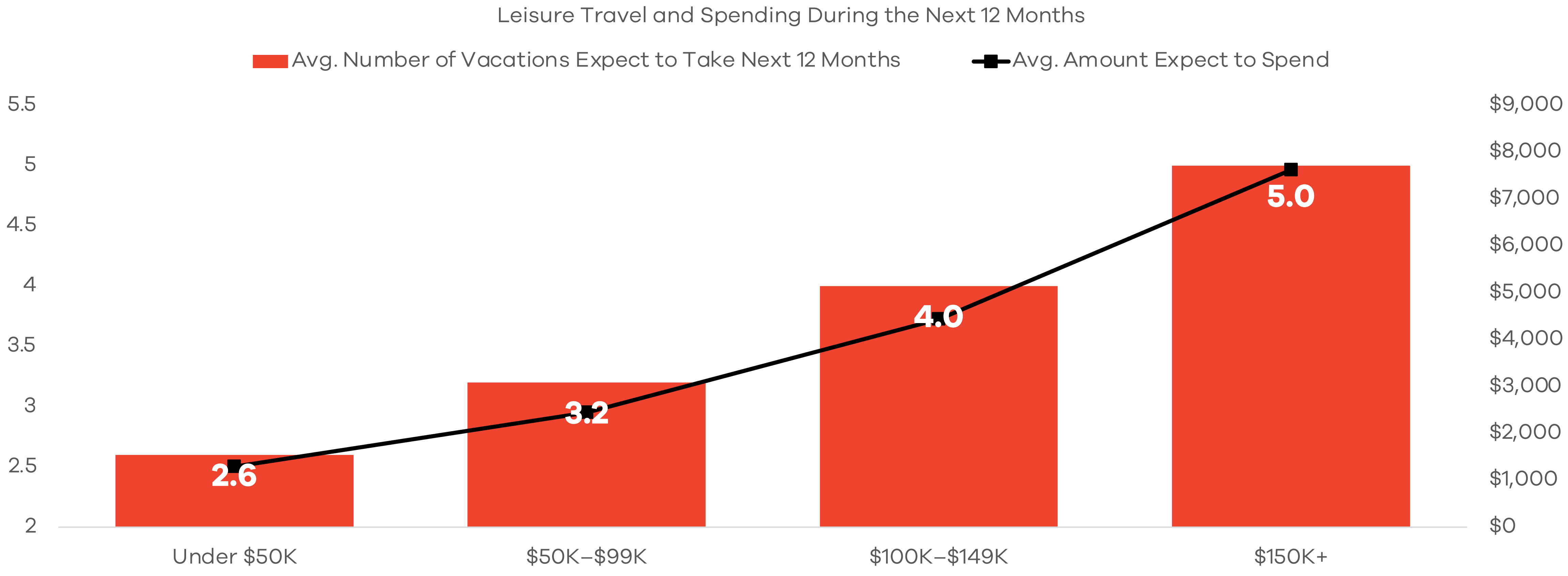
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Fall Edition"

Boomers Expect to Spend the Most on Leisure Travel During the Next 12 Months, While All Generations Plan to Take a Similar Number of Trips.



Base: Active leisure travelers (Gen Zers: n=410; Millennials: n=923; Gen Xers: n=775; Boomers: n=1,065)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

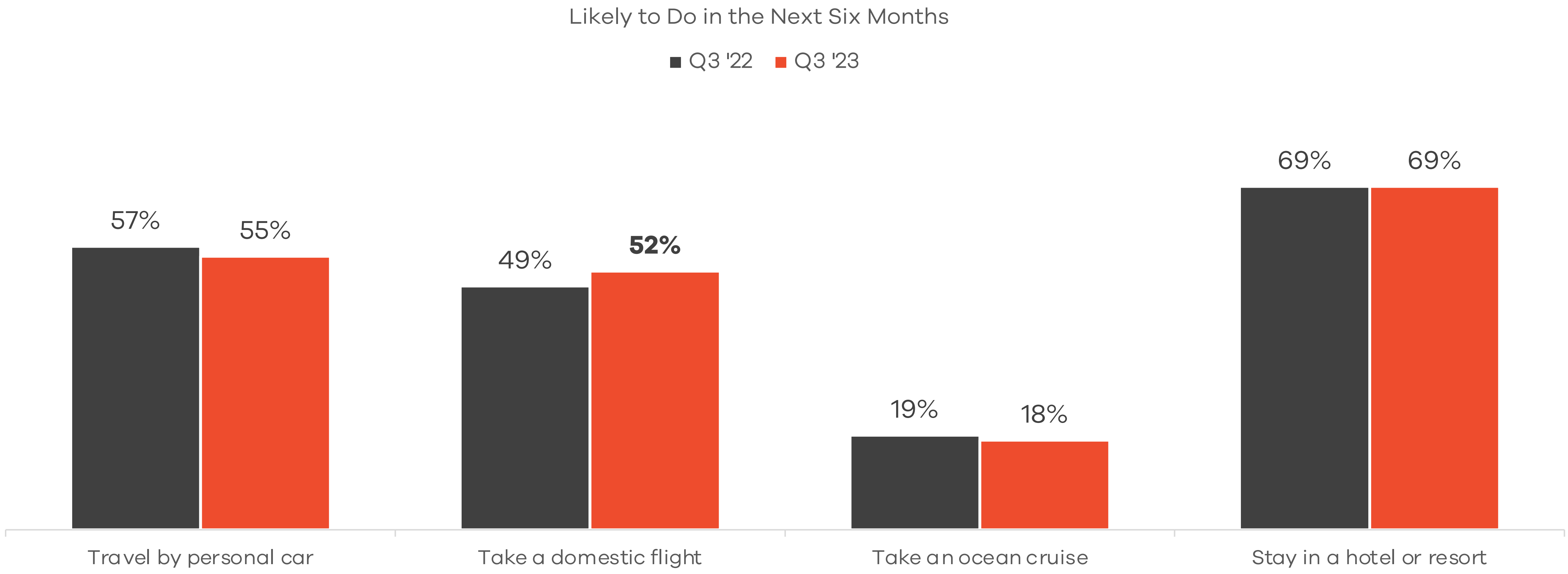
Travel Intentions and Spending Intentions Increase With Household Income.



Base: Active leisure travelers (Under $50K: n=646; $50K–$99K: n=1,020; $100K–$149K: n=690; $150K+: n=939)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

MMGY Travel Intelligence

Likelihood to Travel by Domestic Flight Increased Significantly From Last Year.



Data in bold indicates a statistically significant difference from Q3 2022.
Base: U.S. adults who plan to vacation during the next six months (n=2,651)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Fall Edition"

MMGY Travel Intelligence

Where People Want to Visit

States Interested in Visiting During the Next Two Years

Rank	Destination	% Interested
1	Hawaii	63%
2	Florida	61%
3	California	56%
4	Colorado	54% ▲
5	Alaska	53% ▲
6	New York	50%
7	Nevada	46%
7	Texas	46%
9	Arizona	44% ▲
10	North Carolina	41%
10	South Carolina	41% ▲
12	Tennessee	40%
13	Georgia	39%
14	Washington	37%
14	Maine	37%
16	Montana	34%
16	Louisiana	34%
16	Massachusetts	34%
16	Pennsylvania	34%
20	New Mexico	33%

Rank	Destination	% Interested
21	Oregon	32%
21	Virginia	32%
23	Wyoming	30%
25	Vermont	29%
25	Utah	29% ▼
26	Maryland	28%
26	Michigan	28%
26	New Jersey	28%
26	New Hampshire	28%
30	Rhode Island	27% ▼
30	Connecticut	27%
32	West Virginia	25%
32	Wisconsin	25% ▼
34	South Dakota	24%
34	Illinois	24%
34	Kentucky	24%
34	Missouri	24%
38	Minnesota	23%
38	North Dakota	23%
38	Idaho	23%

Rank	Destination	% Interested
38	Alabama	23% ▼
42	Delaware	22%
42	Arkansas	22%
42	Ohio	22% ▼
45	Mississippi	21% ▼
45	Oklahoma	21%
47	Nebraska	19% ▼
48	Indiana	18% ▼
49	Kansas	17% ▼
49	Iowa	17%

▲ Displayed a statistically significant increase compared to Q3 2022

▼ Displayed a statistically significant decrease compared to Q3 2022

Base: Active leisure travelers (n=3,294)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

MMGY Travel Intelligence

Destinations Interested in Visiting During the Next Two Years

Rank	Destination	% Interested
1	Las Vegas, NV	55%
2	Island of Hawai'i	54%
3	Honolulu, HI	52%
3	Florida Keys/Key West, FL	52%
5	Orlando, FL	50%
6	Maui, HI	49%
7	Kaua'i, HI	48%
7	New York City, NY	48%
9	San Diego, CA	45%
9	Niagara Falls, NY	45%
11	New Orleans, LA	44%
11	Miami, FL	44%
11	Nashville, TN	44%
11	Tampa/St. Petersburg/ Clearwater, FL*	44%
15	Lanai, HI*	43%
15	Los Angeles, CA	43%
17	Denver, CO	42%
18	Palm Beach, FL	42%
18	Washington, D.C.	42%
20	Myrtle Beach, SC	41%
20	San Francisco, CA	41%
22	Fort Lauderdale, FL	40%
22	Boston, MA	40%

Rank	Destination	% Interested
24	Fort Myers/Sanibel/Captiva, FL	39%
24	Palm Springs, CA	39%
24	Napa Valley, CA	39%
24	Hilton Head Island, SC	39%
24	Charleston, SC	39%
29	Daytona Beach, FL	38%
29	Panama City Beach, FL	38%
29	St. Augustine, FL	38%
32	Seattle, WA	37%
32	Phoenix/Scottsdale, AZ	37%
34	Aspen, CO*	36%
34	Sedona, AZ*	36%
34	San Antonio, TX	36%
37	Austin, TX	35%
37	Dallas, TX	35%
37	Outer Banks, NC	35%
37	Charlotte, NC	35%
37	Gatlinburg/Pigeon Forge, TN	35%
42	Virginia Beach, VA	34%
42	Houston, TX	34%
44	Atlanta, GA	33%
45	Chicago, IL	32%
45	Sonoma County, CA	32%

Rank	Destination	% Interested
45	Portland, OR	32%
45	Vail, CO	32%
49	Anaheim, CA	31%
49	Santa Fe, NM*	31%
49	Philadelphia, PA	31%
49	Jackson Hole, WY*	31%
53	San Jose, CA*	30%
53	Asheville, NC	30%
55	Salt Lake City, UT	29%
55	Greenville, SC*	29%
55	Raleigh/Durham, NC	29%
58	Winston-Salem, NC	27%
59	Wilmington, NC	26%
59	Corpus Christi, TX	26%
59	Branson, MO	26%
59	St. Louis, MO	26%
63	Park City, UT*	25%
64	Minneapolis, MN	23%
65	Shreveport, LA*	22%
65	Kansas City, MO	22%
65	Ann Arbor, MI	22%
68	Detroit, MI	21%
68	Cleveland, OH	21%

*Destination was not asked in 2022 so year-over-year comparison is not noted.
Base: Active leisure travelers (n=3,294)
Source: MMGY Global's 2023 *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 Zers	
1	Miami, FL
2	Los Angeles, CA
3	Niagara Falls, NY
4	Las Vegas, NV
4	Palm Beach, FL
6	Orlando, FL
6	New York City, NY
8	Island of Hawai'i
9	Panama City Beach, FL
10	Palm Springs, CA
10	San Francisco, CA

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

Gen Xers	
1	Honolulu, HI
1	Island of Hawai'i
1	Florida Keys/Key West, FL
1	Maui, HI
5	Las Vegas, NV
6	Orlando, FL
7	Kaua'i, HI
8	New York City, NY
9	San Diego, CA
10	Lanai, HI
10	Denver, CO
10	Tampa/St. Petersburg/Clearwater, FL

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

Base: Active leisure travelers (Gen Zers: n=410; Millennials: n=923; Gen Xers: n=775; Boomers: n=1,065)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Fall Edition"

Fall Module

Culinary Travel

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.

14% of all active leisure travelers

4.0 Average number of leisure trips in next 12 months

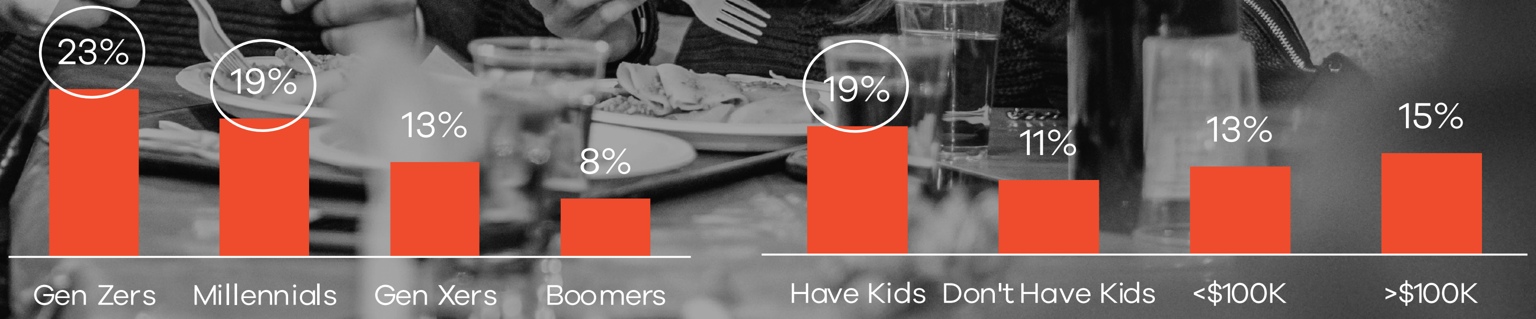
$3,328 Average spend on leisure travel in next 12 months

Top Motivations to Travel:

- Experiencing new cuisines (89%)
- The desire to get away and unplug (87%)
- Experiencing different cultures (85%)

/ Influence is highest among younger generations and travelers with children.

% Who Are Extremely Influenced by the Culinary Scene



Top Cities of Interest:

- Las Vegas (74%)
- The Florida Keys/Key West (71%)
- Island of Hawai'i (71%)
- New York City (69%)
- Orlando (68%)
- Los Angeles (67%)

MMGY Travel Intelligence

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

50% 2022

54% 2023

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)

Gen Zers: **54%**
Millennials: **62%**
Gen Xers: **57%**
Boomers: 46%

Have Kids: **62%**
Don’t Have Kids: 50%

Less than $100K: 52%
$100K or more: 55%

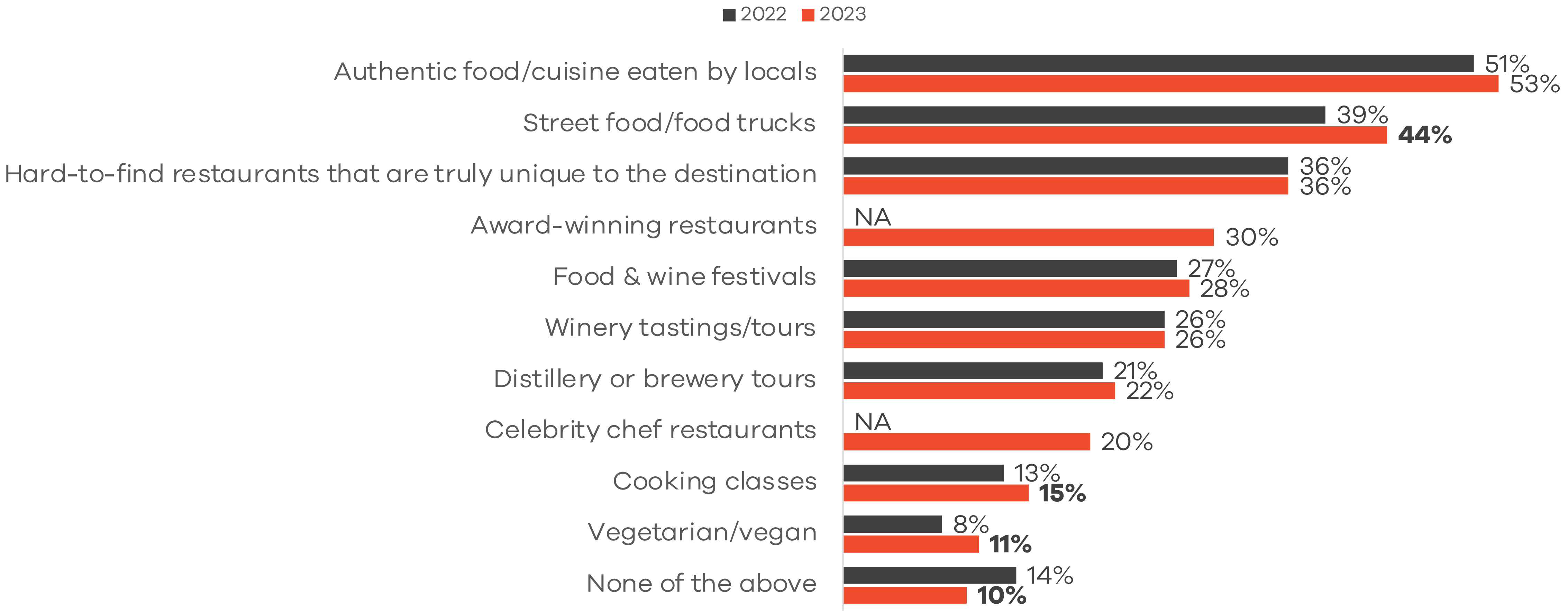
/ More younger travelers and travelers with kids are influenced by the perception of the quality of the culinary scene when choosing where to stay within a destination.

Base: Active leisure travelers (n=3,294)
Source: MMGY Global’s 2023 *Portrait of American Travelers®* "Fall Edition"

MMGY Travel Intelligence

Although Authentic Cuisine Is Still the Top Culinary Experience of Interest, There Is Growing Interest in Street Food/Food Trucks, Cooking Classes and Vegetarian/Vegan Culinary Experiences.

Culinary Experiences of Interest



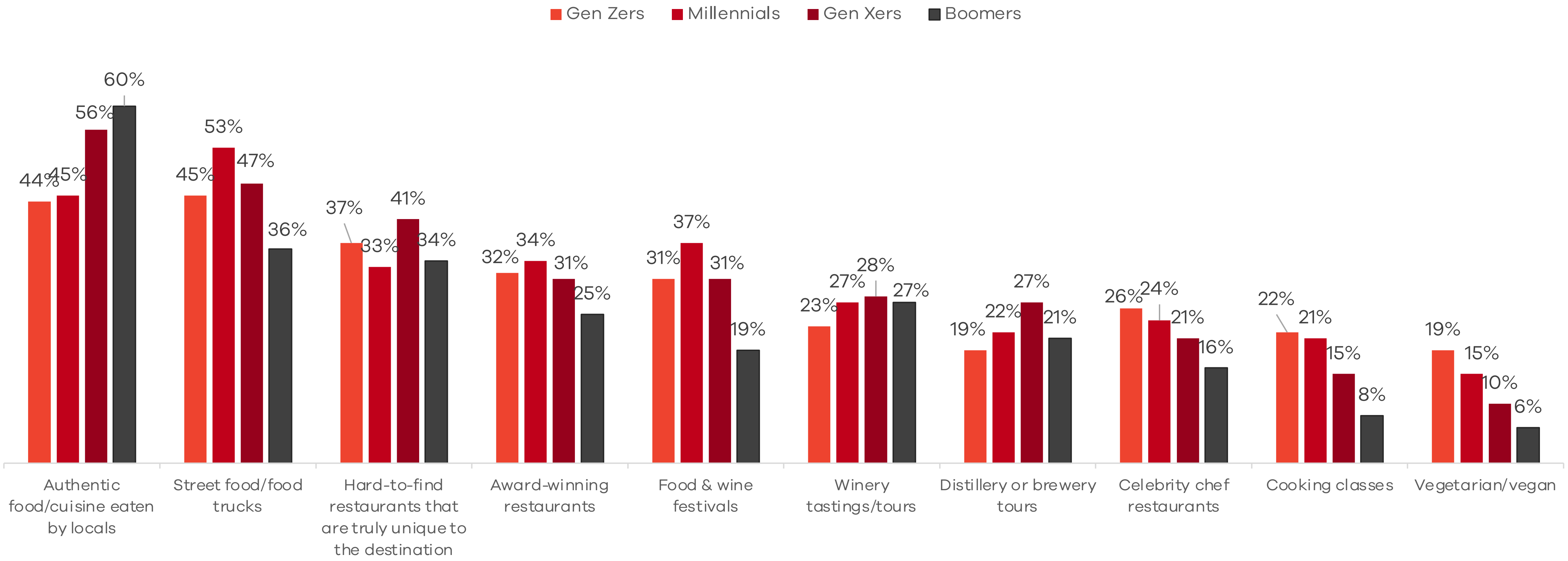
NA: Option was not asked in 2022

Base: Active leisure travelers (n=3,294)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

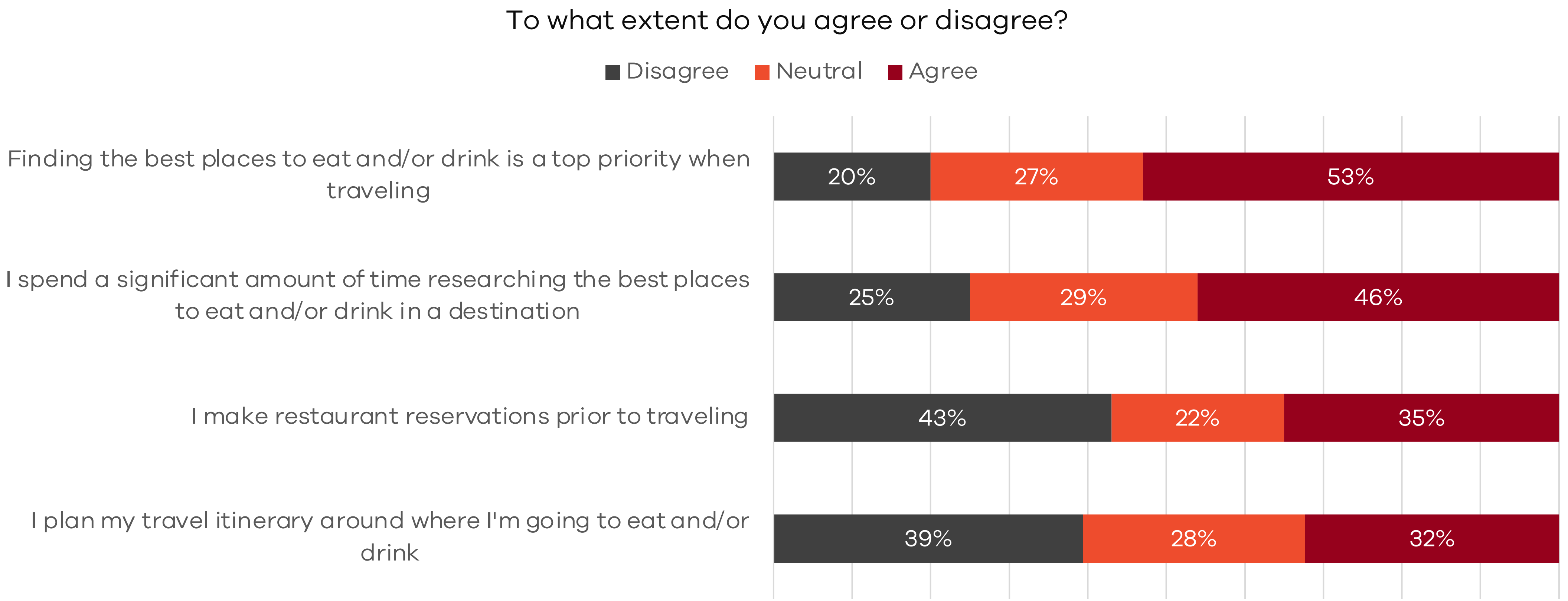
Culinary Experiences of Interest by Generation

/ Older generations are more likely to look for authentic food eaten by locals while younger generations are also interested in street food/food trucks, food & wine festivals, celebrity chef restaurants and cooking classes.



Base: Active leisure travelers (Gen Zers: n=410; Millennials: n=923; Gen Xers: n=775; Boomers: n=1,065)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

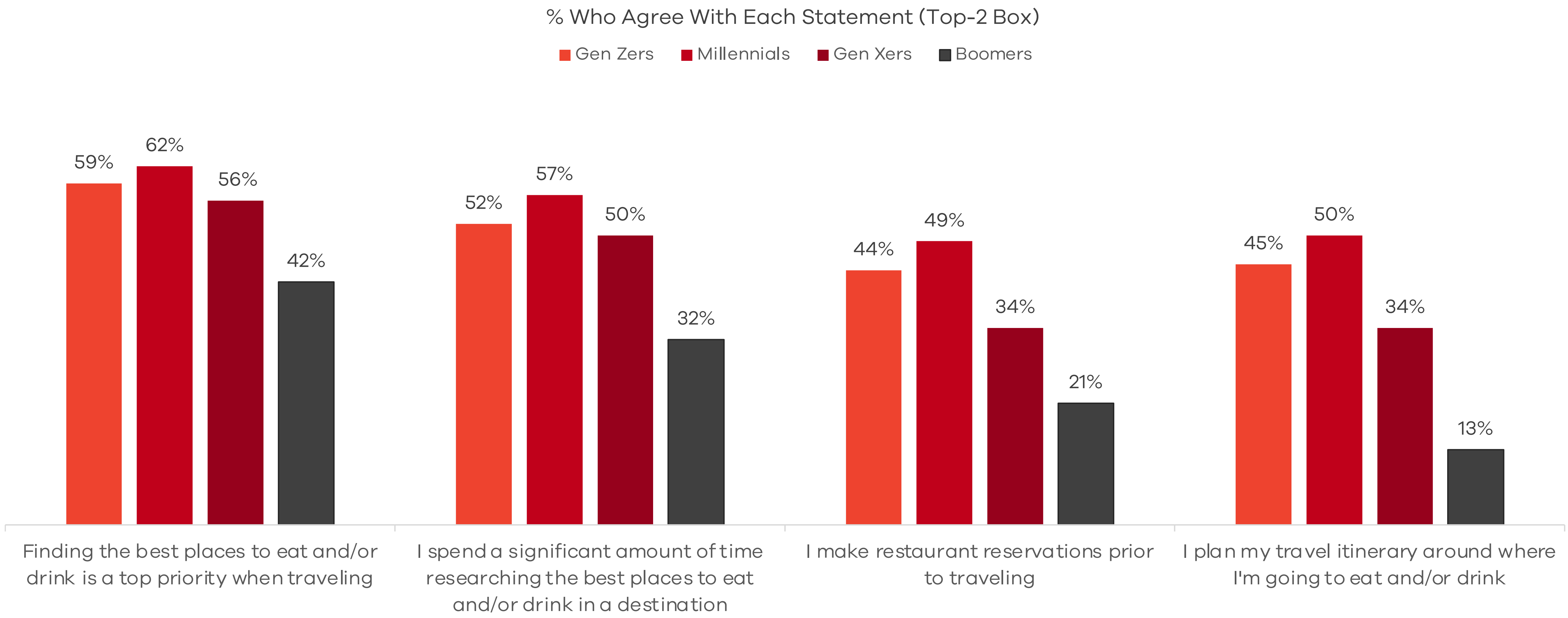
About Half of Active Leisure Travelers Agree That Finding the Best Places to Eat and Drink Is a Top Priority When Traveling and That They Spend a Significant Amount of Time Researching These Options in a Destination.



Base: Active leisure travelers (n=3,294)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

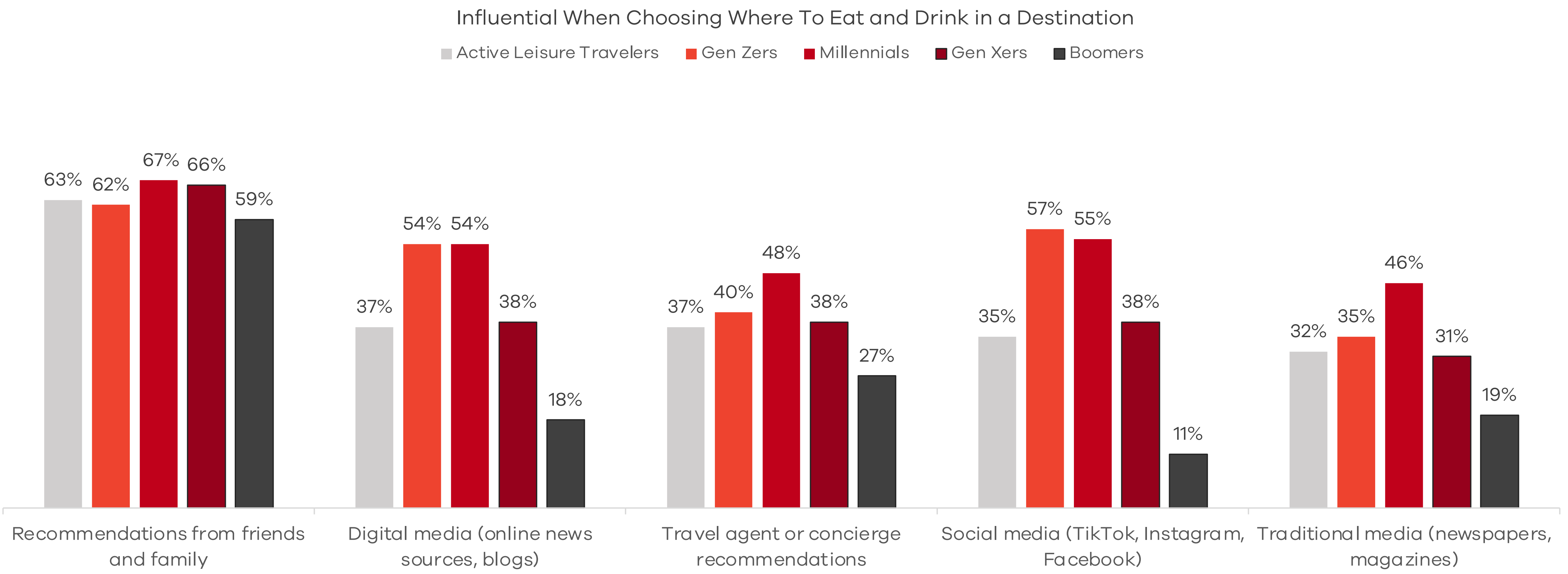
MMGY Travel Intelligence

Millennials Prioritize Culinary Experiences While on Vacation More so Than Other Generations.



Base: Active leisure travelers (Gen Zers: n=410; Millennials: n=923; Gen Xers: n=775; Boomers: n=1,065)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Travelers Are Turning to Recommendations From Friends and Family When Choosing Where to Eat and Drink on Vacation, Followed by Digital Media, Concierge Recommendations and Social Media.



Base: Active leisure travelers (Active leisure travelers: n=3,294; Gen Zers: n=410; Millennials: n=923; Gen Xers: n=775; Boomers: n=1,065)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Fall Module

Holiday Travel

MMGY Travel Intelligence

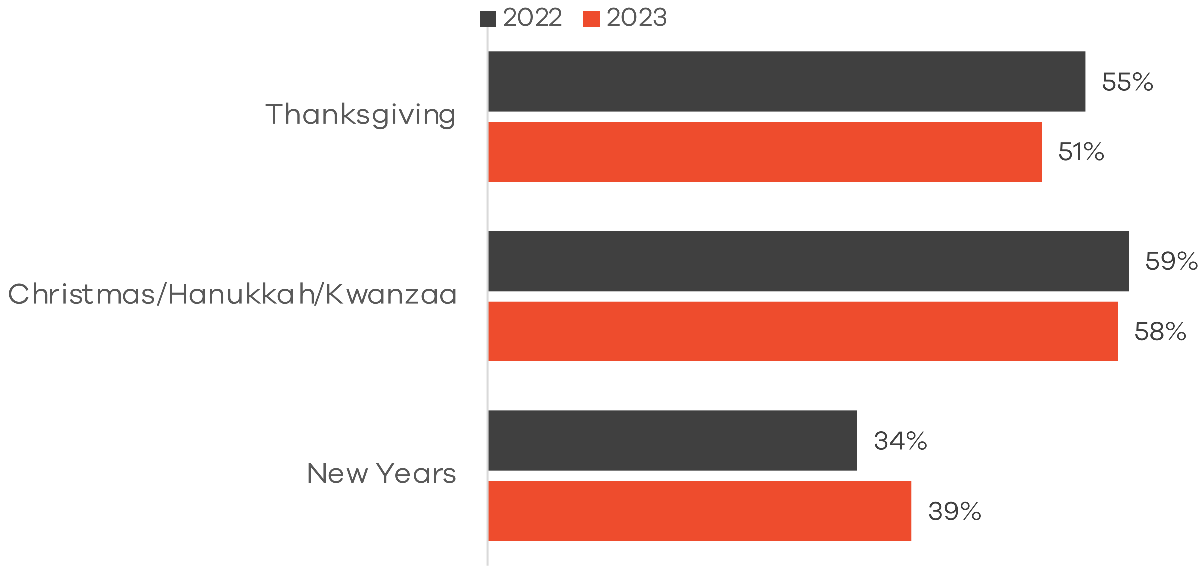
Winter Holiday Travel Plans Are Down Slightly From Last Year.

36% 2022

34% 2023

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

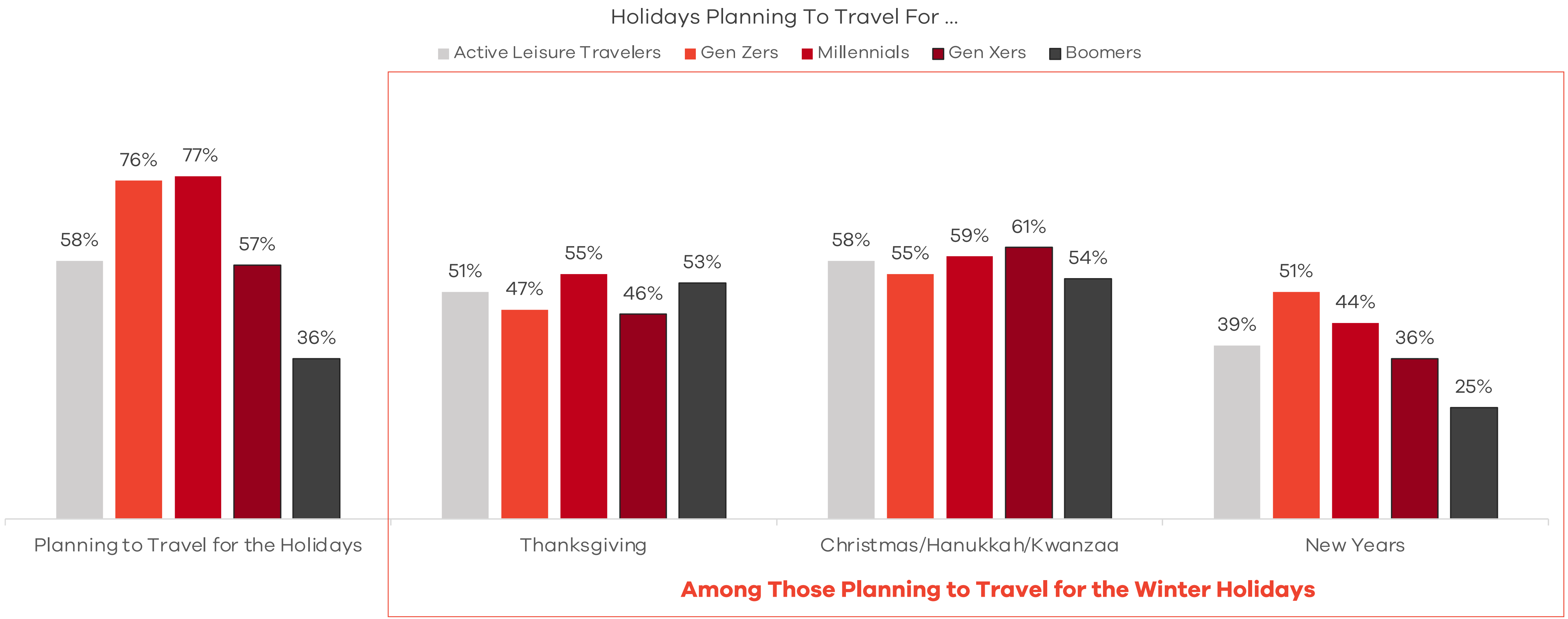
% Planning to Travel For ...
(Among those planning to travel for the winter holidays)



Base: U.S. adults (n=4,515); those planning to travel for the winter holidays (n=1,535)

 Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

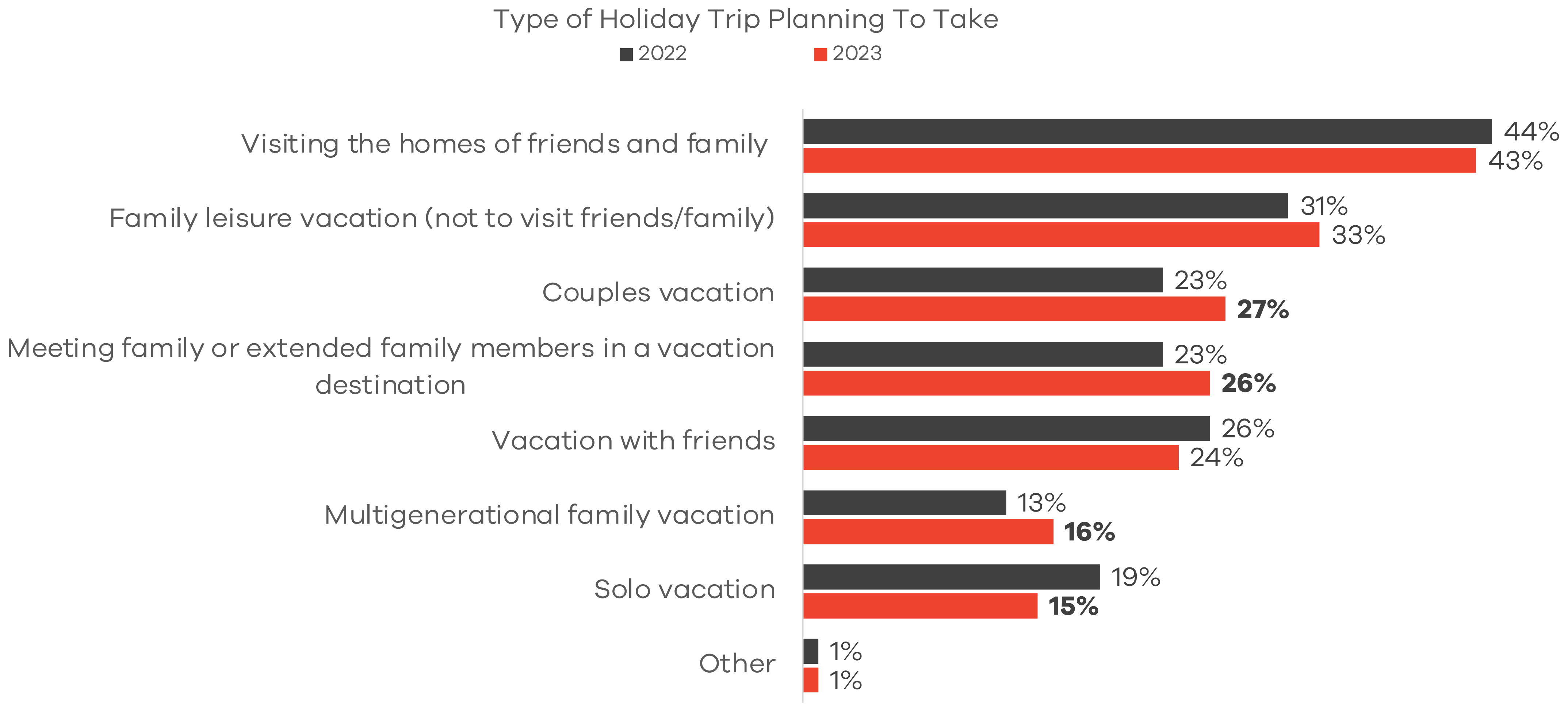
Younger Generations Are More Likely to Travel for the Winter Holidays.



Base: Those planning to travel for the winter holidays (Active leisure travelers: n=1,535; Gen Zers: n=249; Millennials: n=602; Gen Xers: n=340; Boomers: n=312)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Fall Edition"

MMGY Travel Intelligence

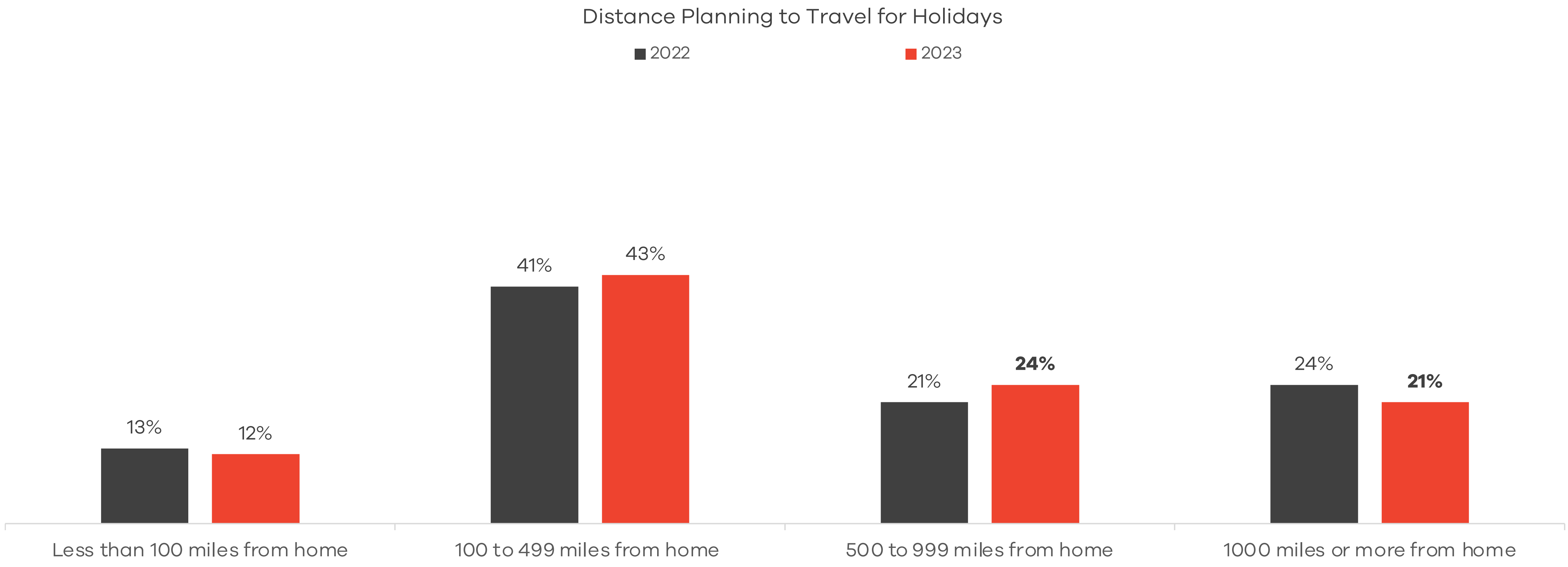
The Most Popular Type of Holiday Trip These Travelers Are Planning to Take is Visiting the Homes of Friends and Family, Followed by a Family Leisure Vacation.



Base: Active leisure travelers who are planning to travel for the holidays (n=1,535)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Fall Edition"

MMGY Travel Intelligence

Similar to Previous Years, the Majority of These Travelers Are Planning to Travel Less Than 500 Miles From Home for Their Winter Holiday Trip.



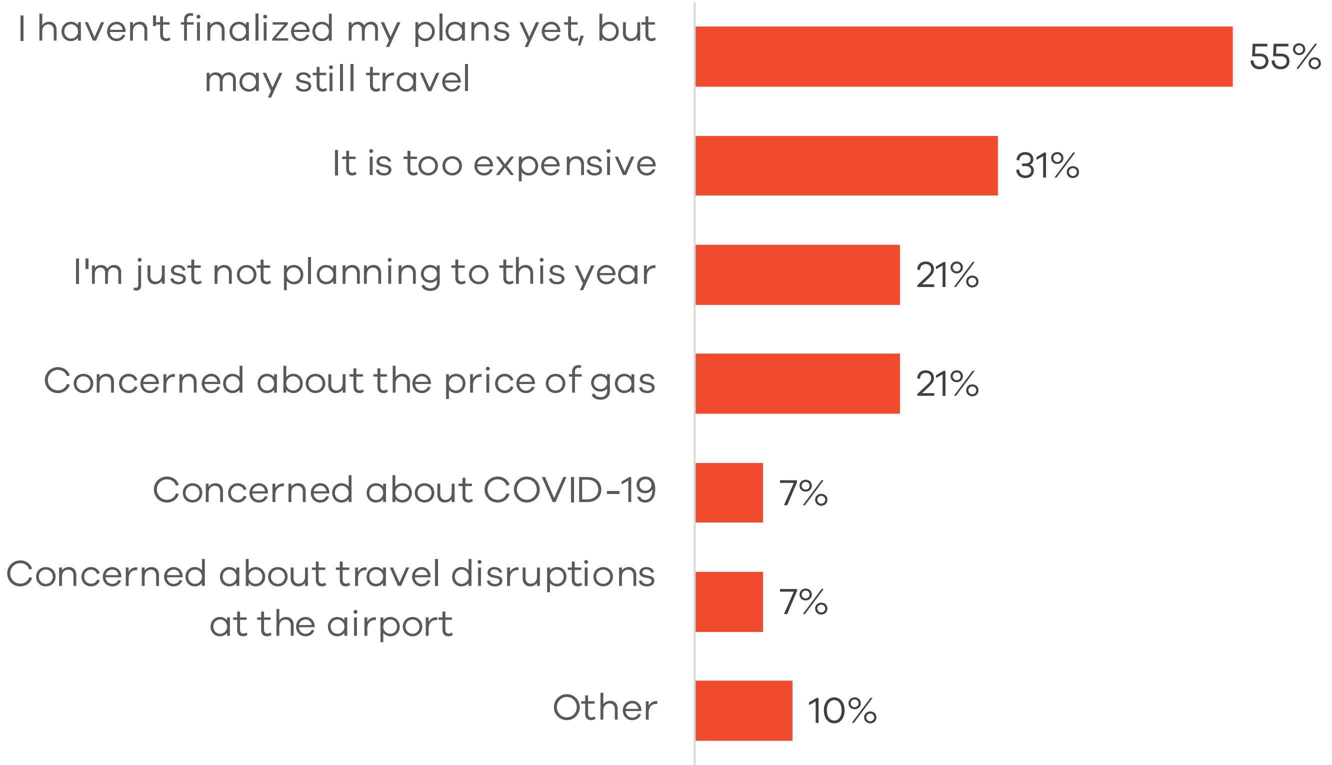
Base: Active leisure travelers who are planning to travel for the holidays (n=1,535)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Among Those Who Said They're Not Planning to Travel for the Winter Holidays, Only 12% Typically Travel for the Winter Holidays. More Than Half of These Travelers Indicate They Just Haven't Finalized Their Winter Travel Plans Yet.

12%

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=1,113); those who typically travel for winter holidays (n=137)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

MMGY Travel Intelligence


Fall Module
Cruising
MMGY Travel Intelligence

52%

of active leisure travelers are interested in taking an **ocean cruise** in the next two years.

Gen Zers: 54%
Millennials: 55%
Gen Xers: 54%
Boomers: 46%

Have Kids: 56%
Don't Have Kids: 49%

Less Than $100K: 50%
$100K or more: 54%

50%

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

Gen Zers: 36%
Millennials: 48%
Gen Xers: 52%
Boomers: 55%

Have Kids: 51%
Don't Have Kids: 49%

Less Than $100K: 48%
$100K or more: 52%

40%

of active leisure travelers are interested in taking an **expedition cruise** in the next two years.

Gen Zers: 36%
Millennials: 50%
Gen Xers: 47%
Boomers: 30%

Have Kids: 52%
Don't Have Kids: 35%

Less Than $100K: 39%
$100K or more: 42%

Base: Active leisure travelers (n=3,294)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Fall Edition"

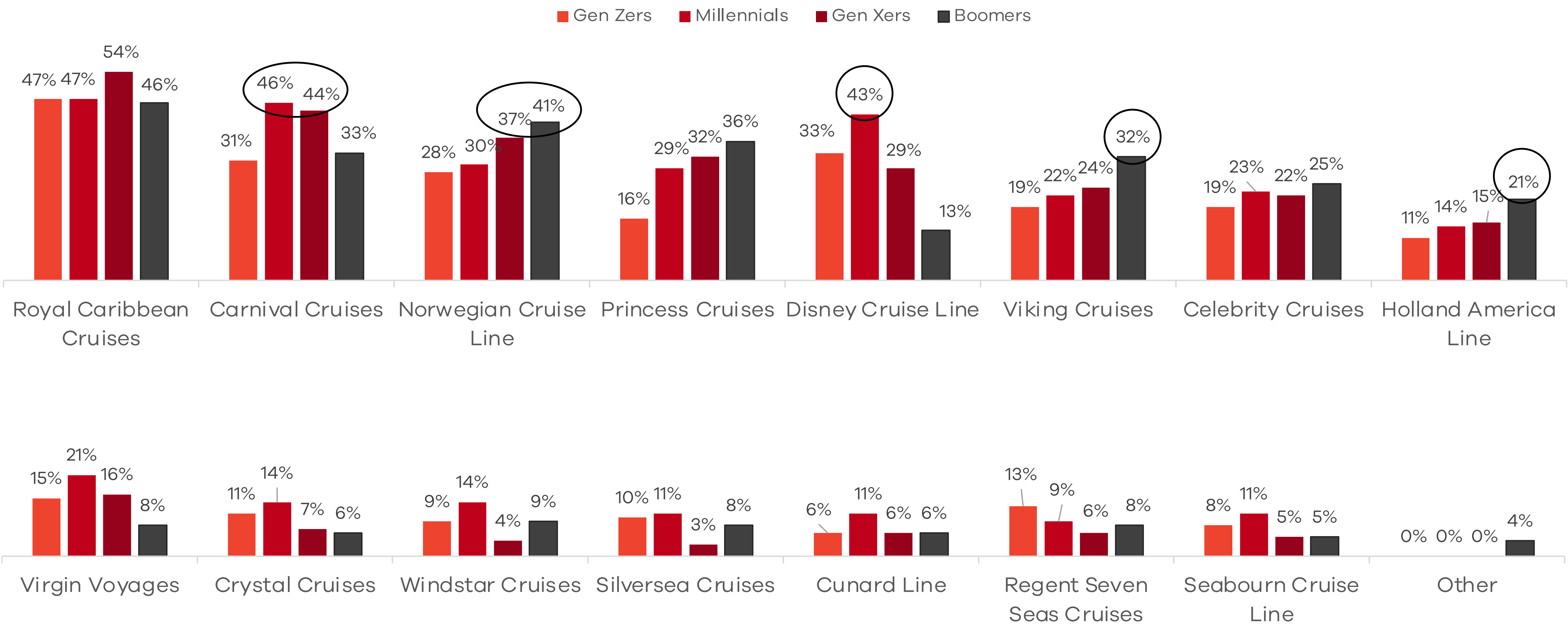
Interest in Ocean Cruise Lines

% Interested in Ocean Cruise Line Brands	Q3 '23
Royal Caribbean Cruises	48%
Carnival Cruise Line	39%
Norwegian Cruise Line	35%
Princess Cruises	30%
Disney Cruise Line	29%
Viking Cruises	26%
Celebrity Cruises	23%
Holland America Line	17%
Virgin Voyages	14%
Crystal Cruises	9%
Windstar Cruises	9%
Silversea Cruises	8%
Cunard Line	8%
Regent Seven Seas Cruises	8%
Seabourn Cruise Line	7%
Other	1%

Base: Active leisure travelers interested in ocean cruising (n=1,700)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Fall Edition"

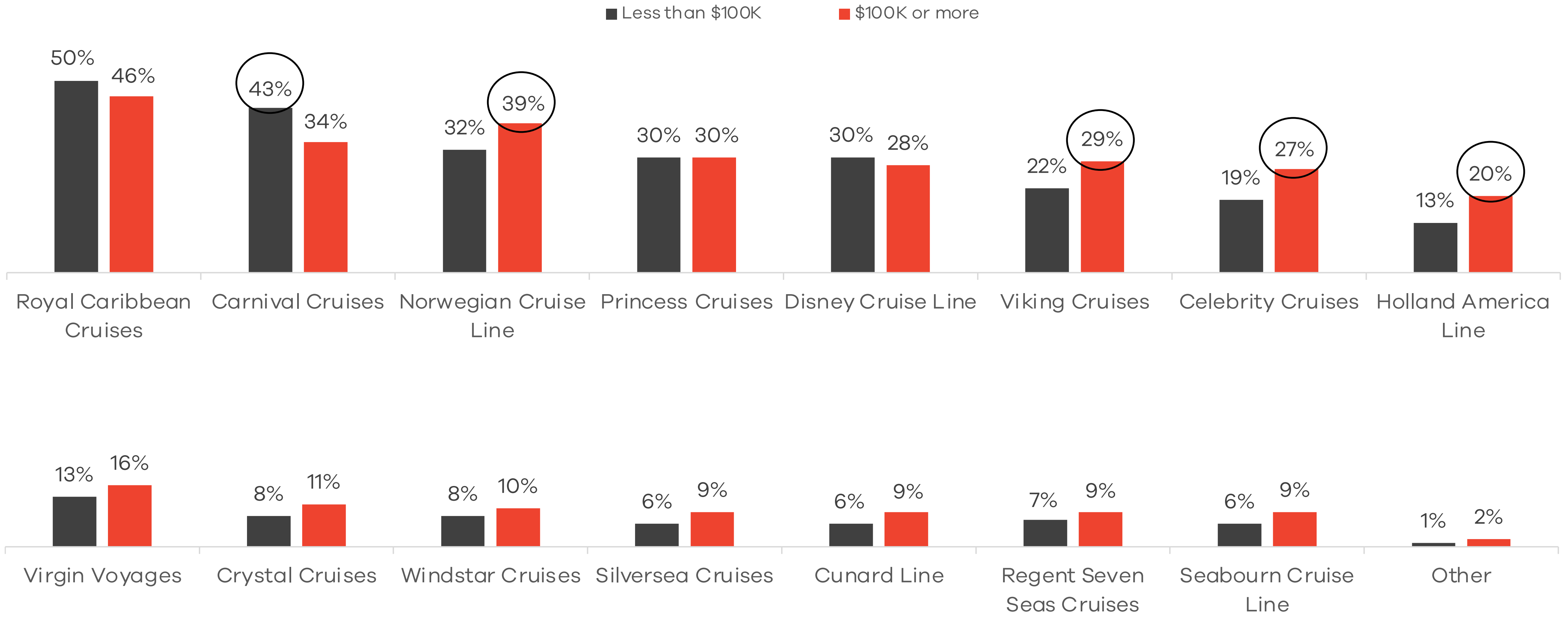
MMGY Travel Intelligence

Interest in Ocean Cruise Line Brands by Generation



Base: Active leisure travelers interested in ocean cruising (Gen Zers: n=221; Millennials: n=509; Gen Xers: n=420; Boomers: n=492)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

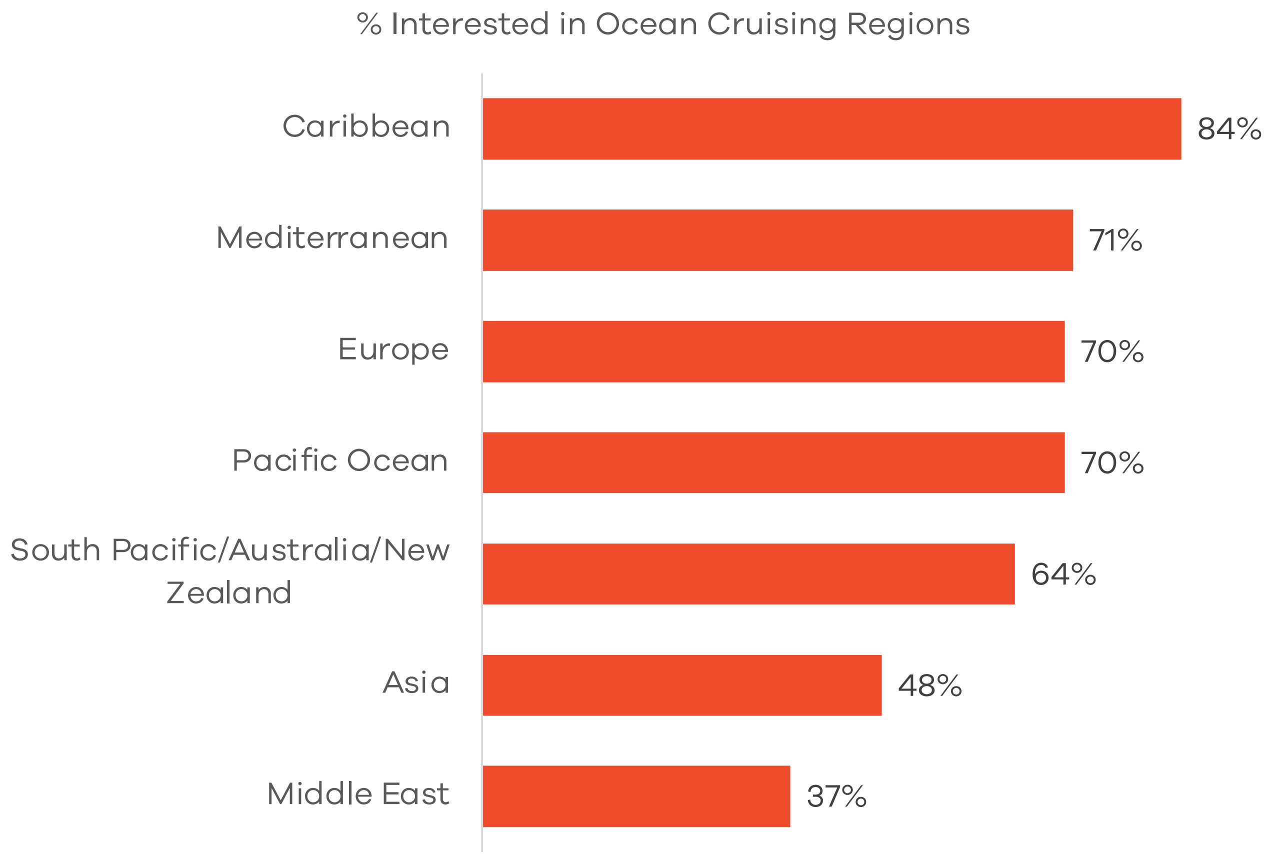
Interest in Ocean Cruise Line Brands by Household Income



Base: Active leisure travelers interested in ocean cruising (Less than $100K: n=828; $100K or more: n=873)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

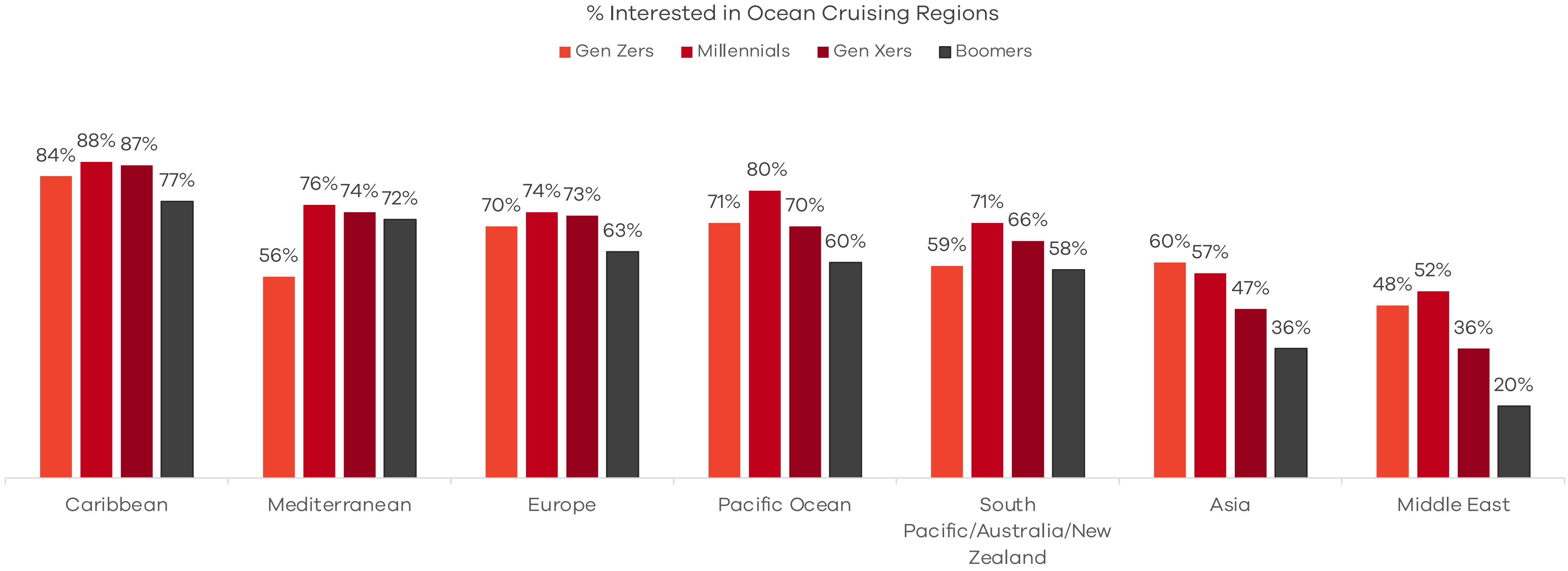
MMGY Travel Intelligence

The Caribbean Garners the Most Interest as an Ocean Cruising Destination, Followed by the Mediterranean, Europe and the Pacific Ocean.



Base: Active leisure travelers interested in ocean cruising (n=1,700)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Fall Edition"

Millennials Display the Most Interest in Nearly All Ocean Cruise Destinations, With the Caribbean and Pacific Ocean Garnering the Most Interest Among This Generation.



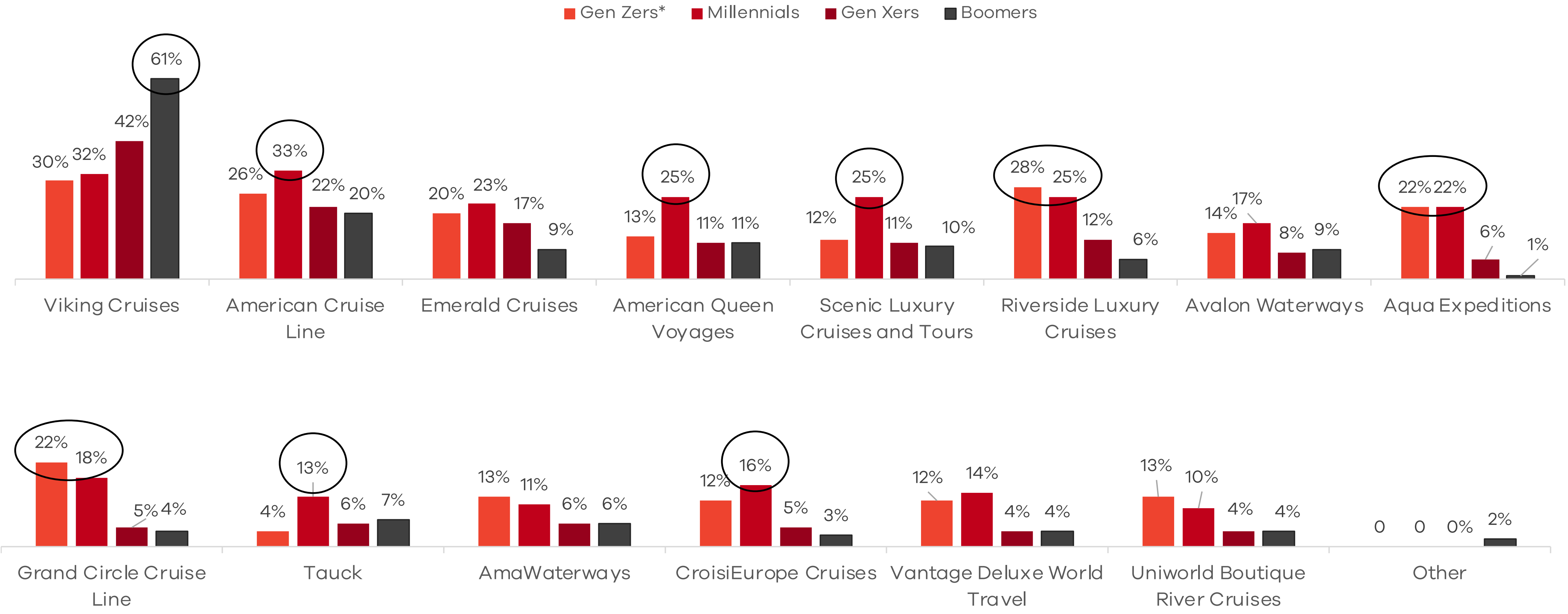
Base: Active leisure travelers interested in ocean cruising (Gen Zers: n=221; Millennials: n=509; Gen Xers: n=420; Boomers: n=492)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Interest in River Cruise Lines

% Interested in River Cruise Line Brands	Q3 '23
Viking Cruises	46%
American Cruise Lines	25%
Emerald Cruises	16%
American Queen Voyages	15%
Scenic Luxury Cruises and Tours	14%
Riverside Luxury Cruises	14%
Avalon Waterways	11%
Aqua Expeditions	10%
Grand Circle Cruise Line	10%
Tauck	9%
AmaWaterways	8%
CroisiEurope Cruises	7%
Vantage Deluxe World Travel	7%
Uniworld Boutique River Cruises	6%
Other	1%

Base: Active leisure travelers interested in river cruising (n=1,642)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Interest in River Cruise Line Brands by Generation



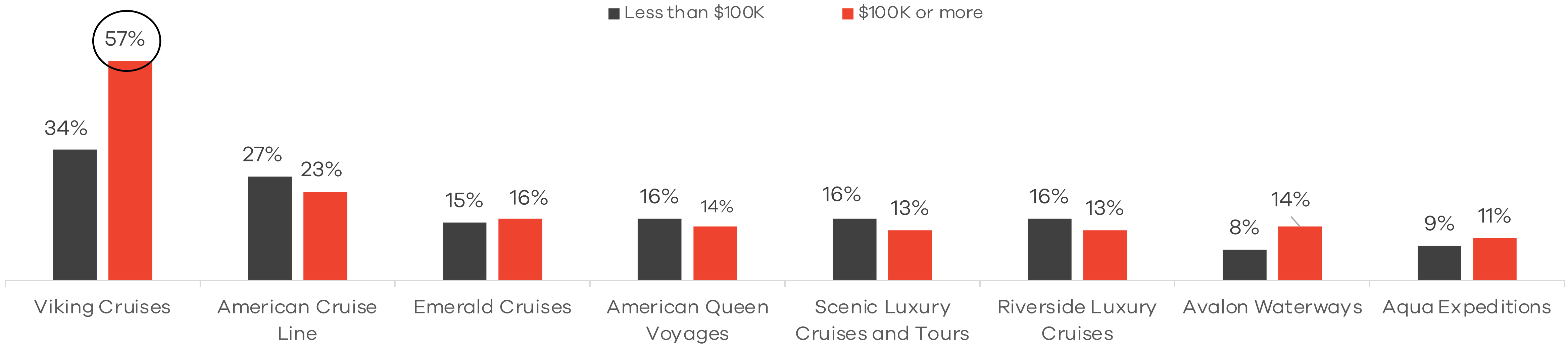
* Small sample size – Interpret with caution

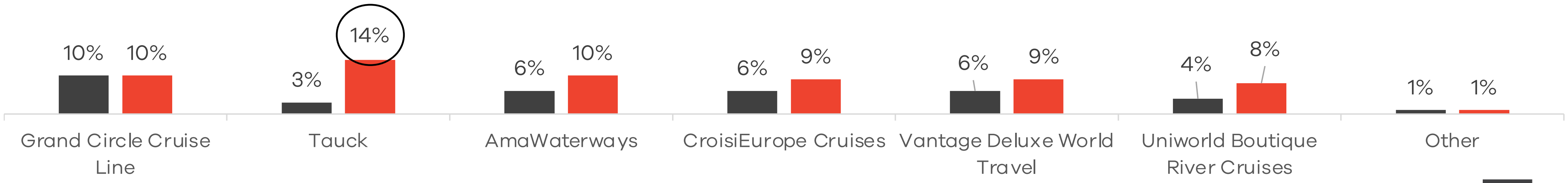
Base: Active leisure travelers interested in river cruising (Gen Zers: n=147; Millennials: n=444; Gen Xers: n=400; Boomers: n=587)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

MMGY Travel Intelligence

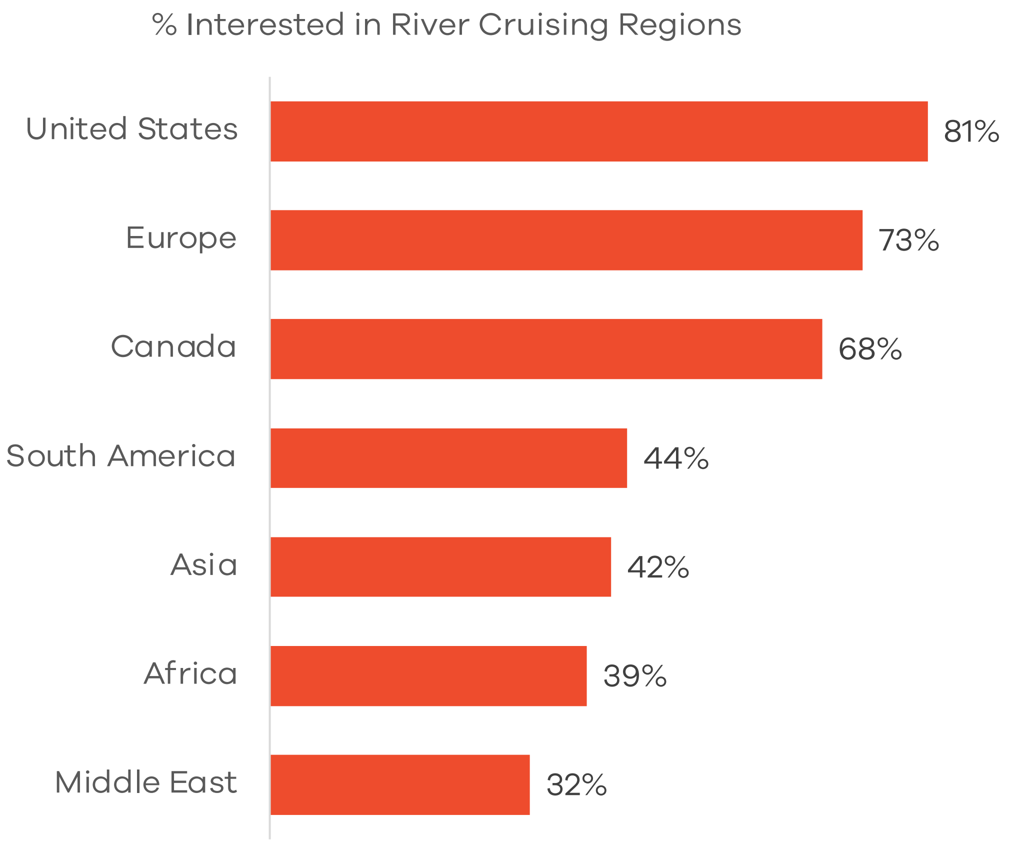
Interest in River Cruise Line Brands by Household Income





Base: Active leisure travelers interested in river cruising (Less than $100K: n=797; $100K or more: n=844)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

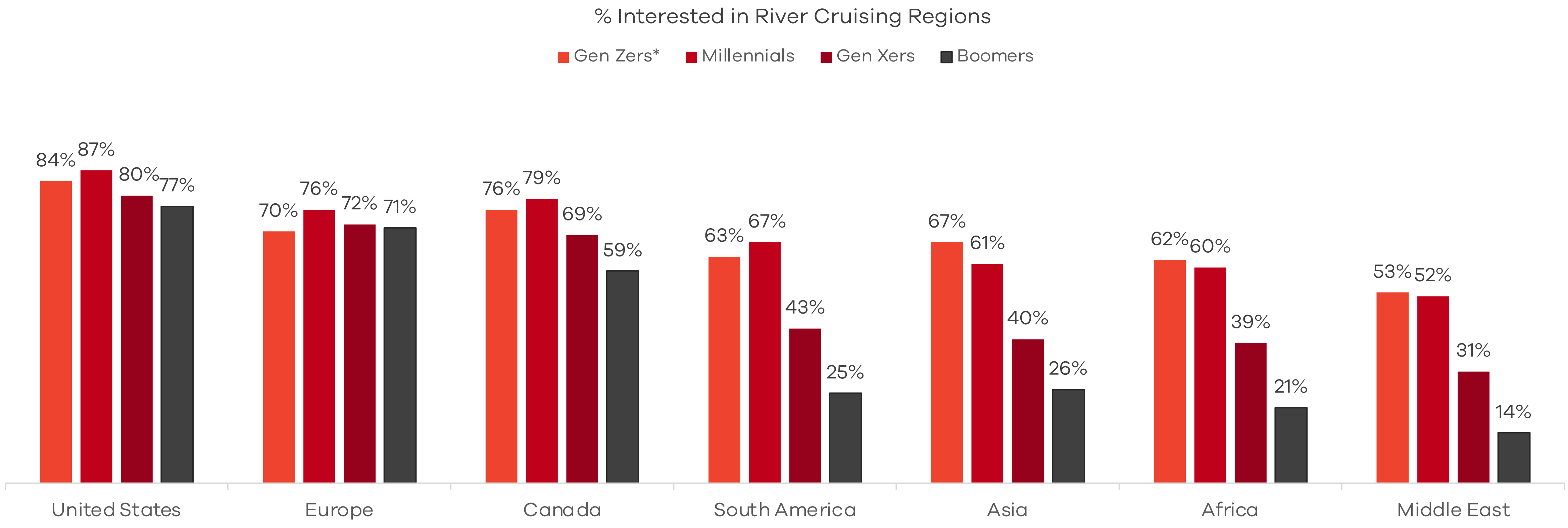
The United States Garners the Most Interest as a River Cruising Destination, Followed by Europe and Canada.



Base: Active leisure travelers interested in river cruising (n=1,642)

Source: MMGY Global's 2023 *Portrait of American Travelers®* "Fall Edition"

The United States Is the Top Region of Interest for River Cruising Among All Generations. Younger Travelers Are Also More Interested in Less Popular Destinations Compared to Older Travelers.

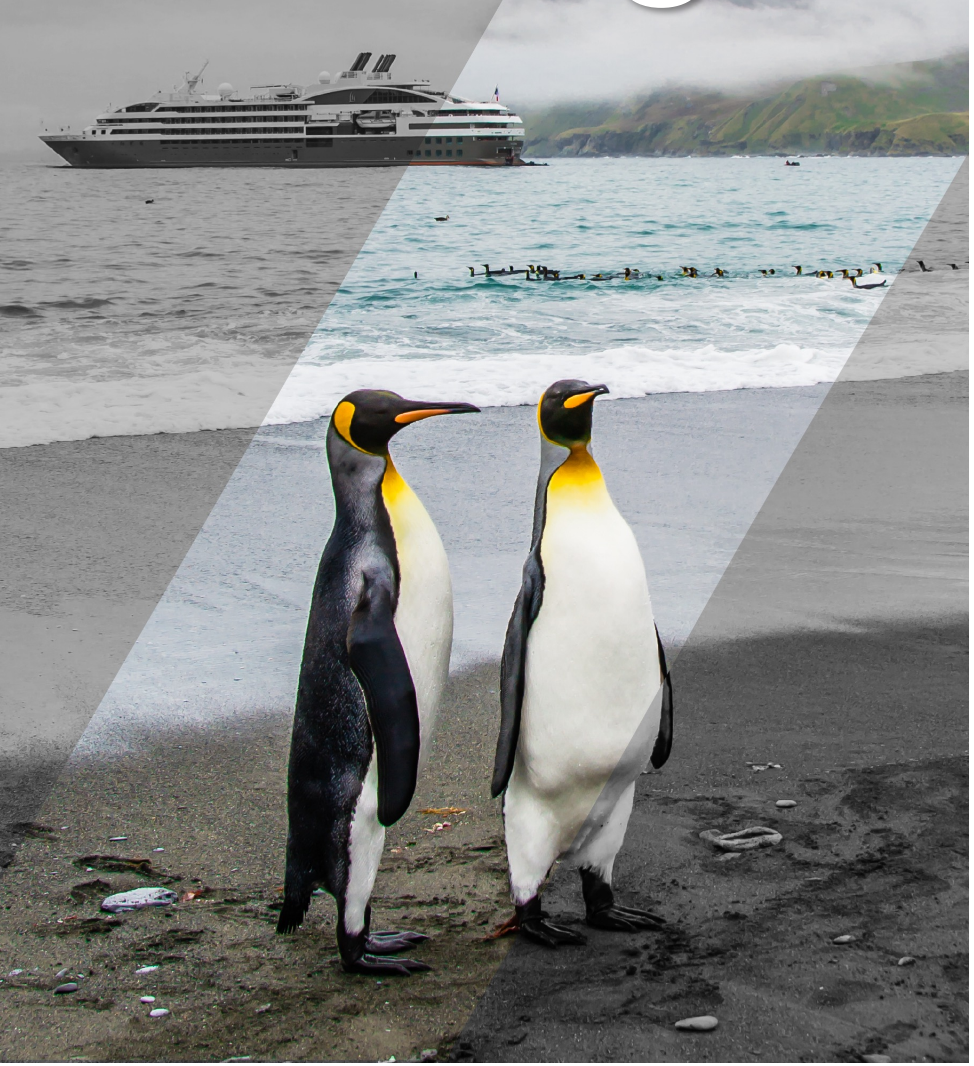


* Small sample size – Interpret with caution

Base: Active leisure travelers interested in river cruising (Gen Zers: n=147; Millennials: n=444; Gen Xers: n=400; Boomers: n=587)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Expedition Cruising



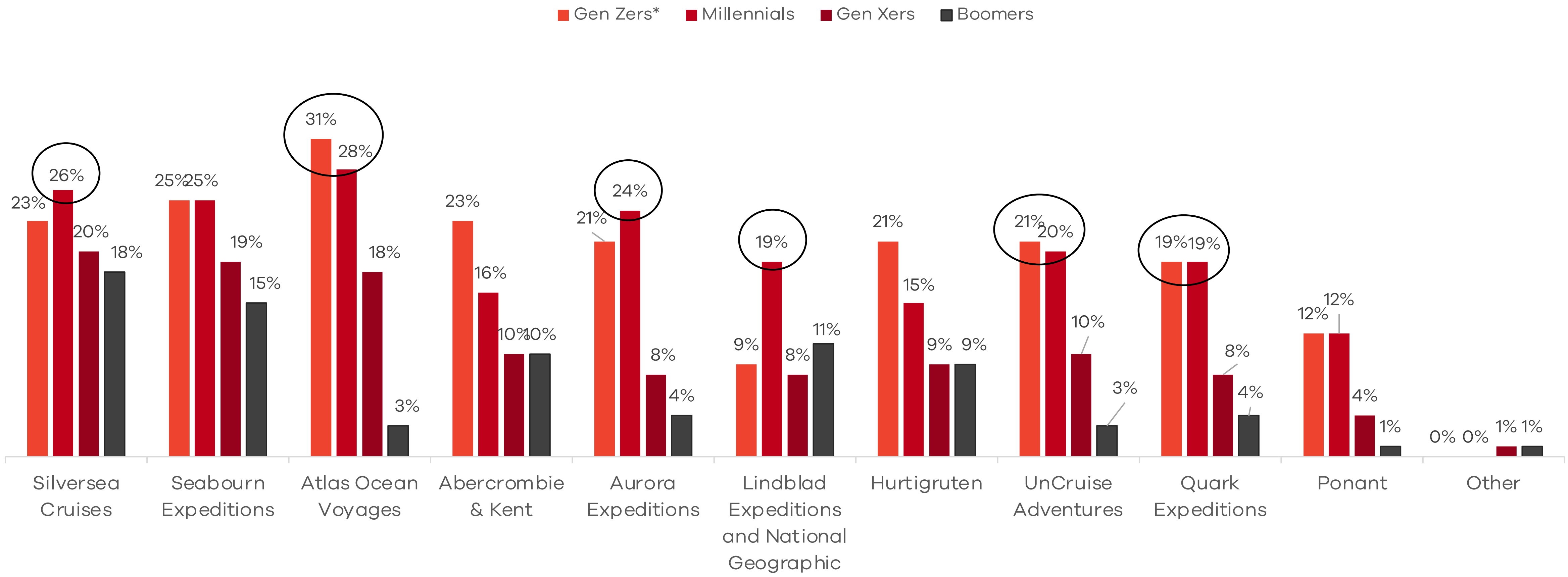
Interest in Expedition Cruise Brands

% Interested in Expedition Cruise Line Brands	Q3 '23
Silversea Cruises	22%
Seabourn Expeditions	21%
Atlas Ocean Voyages	19%
Abercrombie & Kent	14%
Aurora Expeditions	14%
Lindblad Expeditions and National Geographic	13%
Hurtigruten	13%
UnCruise Adventures	13%
Quark Expeditions	12%
Ponant	7%
Other	1%

Base: Active leisure travelers interested in expedition cruising (n=1,332)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Fall Edition"

MMGY Travel Intelligence

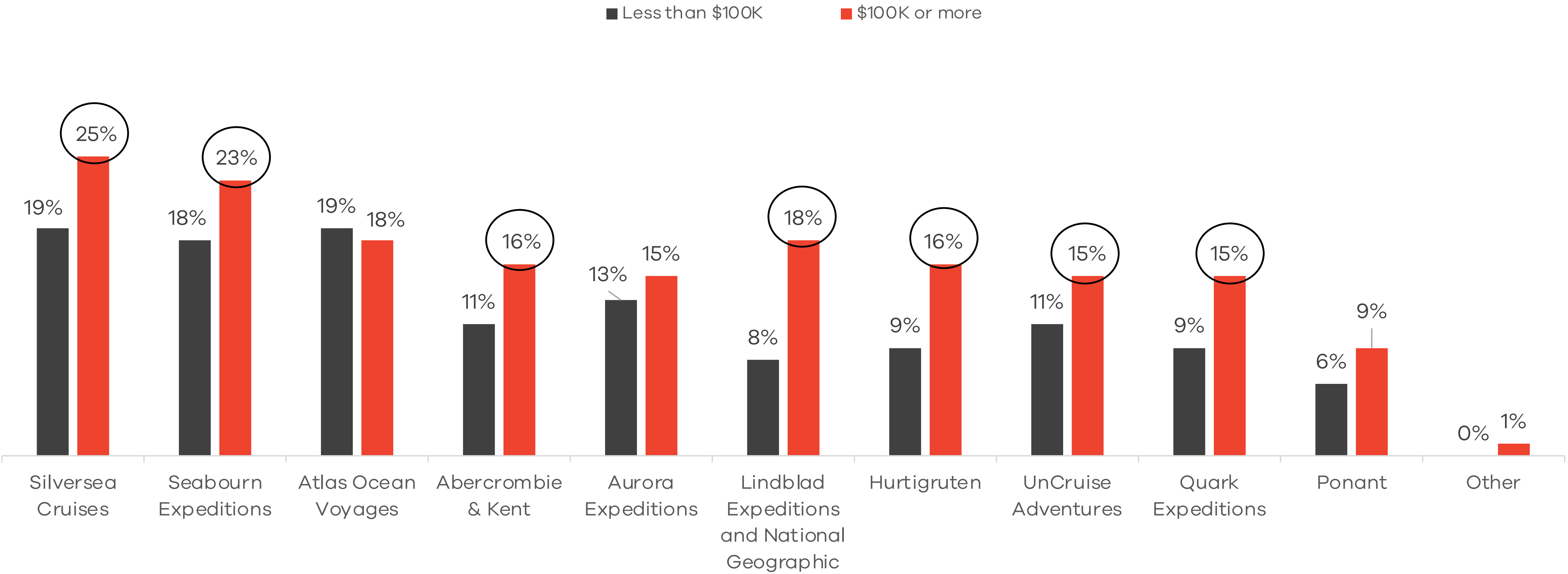
Interest in Expedition Cruise Line Brands by Generation



* Small sample size – Interpret with caution
Base: Active leisure travelers interested in expedition cruising (Gen Zers: n=147; Millennials: n=461; Gen Xers: n=365; Boomers: n=317)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

MMGY Travel Intelligence

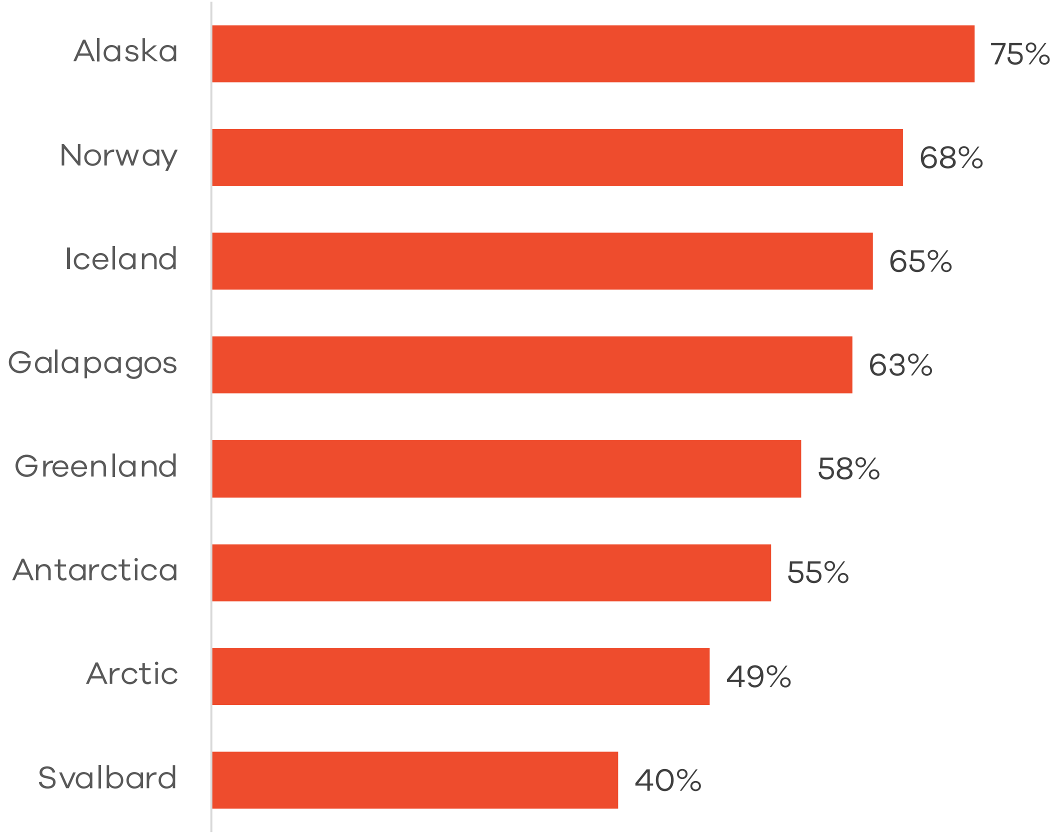
Interest in Expedition Cruise Line Brands by Household Income



Base: Active leisure travelers interested in expedition cruising (Less than $100K: n=648; $100K or more: n=684)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

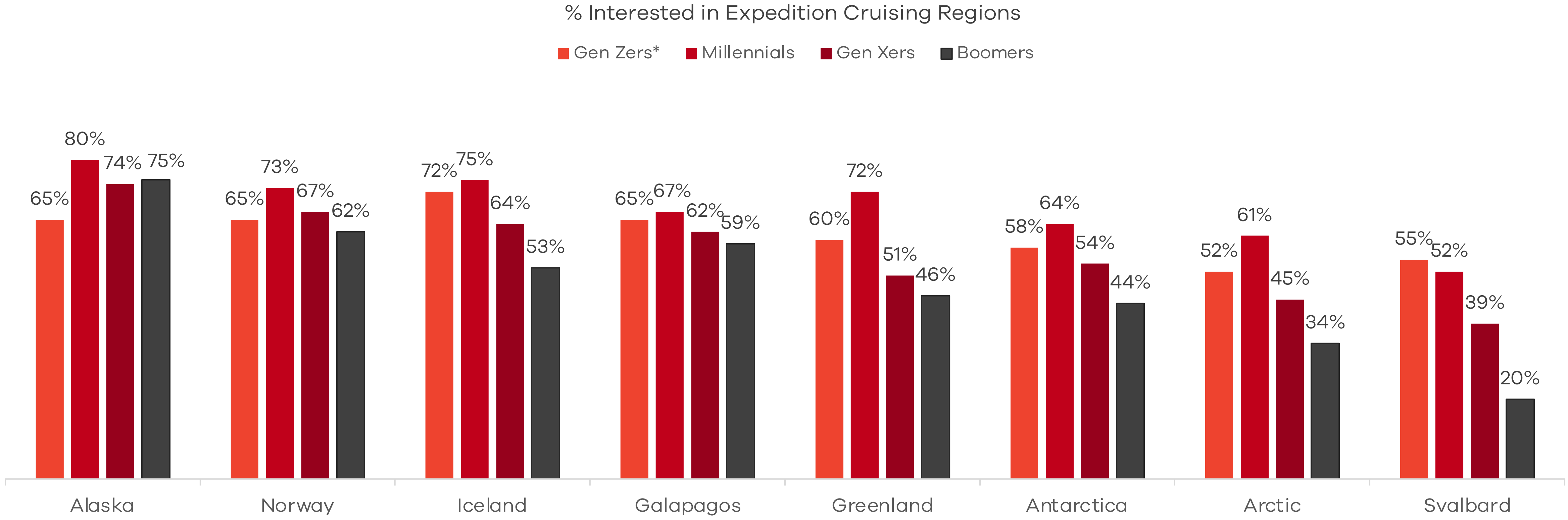
Alaska Garners the Most Interest as an Expedition Cruising Destination, Followed by Norway and Iceland.

% Interested in Expedition Cruising Regions



Base: Active leisure travelers interested in expedition cruising (n=1,332)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Millennials Display the Most Interest in All Expedition Cruise Destinations, With Alaska, Iceland, Norway and Greenland Garnering the Most Interest Among This Generation.



* Small sample size – Interpret with caution
Base: Active leisure travelers interested in expedition cruising (Gen Zers: n=147; Millennials: n=461; Gen Xers: n=365; Boomers: n=317)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Cleanliness of the Ship/Brand, Quality of the Food Available on Board and the Price of the Cruise Are the Most Influential Factors When Selecting a Cruise Line.

Influential When Selecting a Cruise Line	Q3 '23
Safety/cleanliness standards of cruise ship/brand	85%
Quality of the food available on board	83%
Price of the cruise	83%
Cabin size/quality	79%
Ports of call/available itineraries	78%
Cost/convenience of traveling to/from port of departure	78%
Cruise brand name/reputation	76%
Size of the cruise ship	71%
Quality and diversity of excursions available	65%
Previous positive experience with the cruise line	63%
Luxury accommodations	57%
Nightlife/entertainment options	55%
Proof of vaccination required	48%
Membership in cruise line loyalty program	39%
Availability of onboard gambling	35%
Children's activities	31%

Base: Active leisure travelers interested in cruising (n=2,148)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Safety/Cleanliness Standards and Quality of Food Available on Board Is a Top Influential Factor Among All Generations.

/ The price of the cruise is another top factor among many generations, while Millennials are also influenced by the convenience of the port of departure and Gen Xers and Boomers are influenced by ports of call/itineraries.

Top four factors for each generation are shaded in black.

Influential When Selecting a Cruise Line	Gen Zers	Millennials	Gen Xers	Boomers
Safety/cleanliness standards of cruise ship/brand	72%	80%	85%	92%
Quality of the food available on board	74%	80%	86%	88%
Price of the cruise	70%	81%	85%	88%
Cabin size/quality	72%	75%	80%	82%
Ports of call/available itineraries	57%	73%	82%	88%
Cost/convenience of traveling to/from port of departure	68%	77%	79%	81%
Cruise brand name/reputation	69%	75%	78%	77%
Size of the cruise ship	72%	72%	67%	72%
Quality and diversity of excursions available	58%	67%	64%	66%
Previous positive experience with the cruise line	67%	63%	62%	62%
Luxury accommodations	58%	64%	59%	53%
Nightlife/entertainment options	61%	61%	60%	45%
Proof of vaccination required	50%	52%	45%	44%
Membership in cruise line loyalty program	42%	53%	39%	26%
Availability of onboard gambling	36%	50%	40%	21%
Children's activities	38%	59%	30%	8%

Base: Active leisure travelers interested in cruising (Gen Zers: n=259; Millennials: n=593; Gen Xers: n=526; Boomers: n=686)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Fall Edition"

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

19% of all active leisure travelers

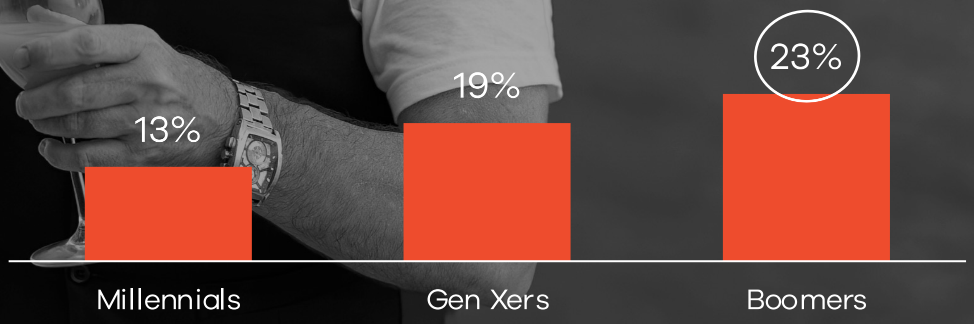
5.2 Average number of leisure trips in next 12 months

$8,420 Average spend on leisure travel in next 12 months

Top Motivations to Travel:

- To spend time with my spouse/significant other and/or children (82%)
- The desire to get away and unplug (78%)
- Experiencing different cultures (71%)
- Exploring natures and the outdoors (68%)
- Experiencing new cuisines (68%)

% of Active Leisure Travelers Who Are Considered Affluent Cruisers



Top Cruising Regions of Interest

Ocean cruising:

- Caribbean (83%)
- Mediterranean (74%)
- Europe (73%)

River cruising:

- Europe (89%)
- United States (77%)
- Canada (67%)

Expedition cruising:

- Alaska (73%)
- Norway (71%)
- Galapagos (71%)

MMGY Travel Intelligence

Vacation Motivators and Activities

MMGY Travel Intelligence

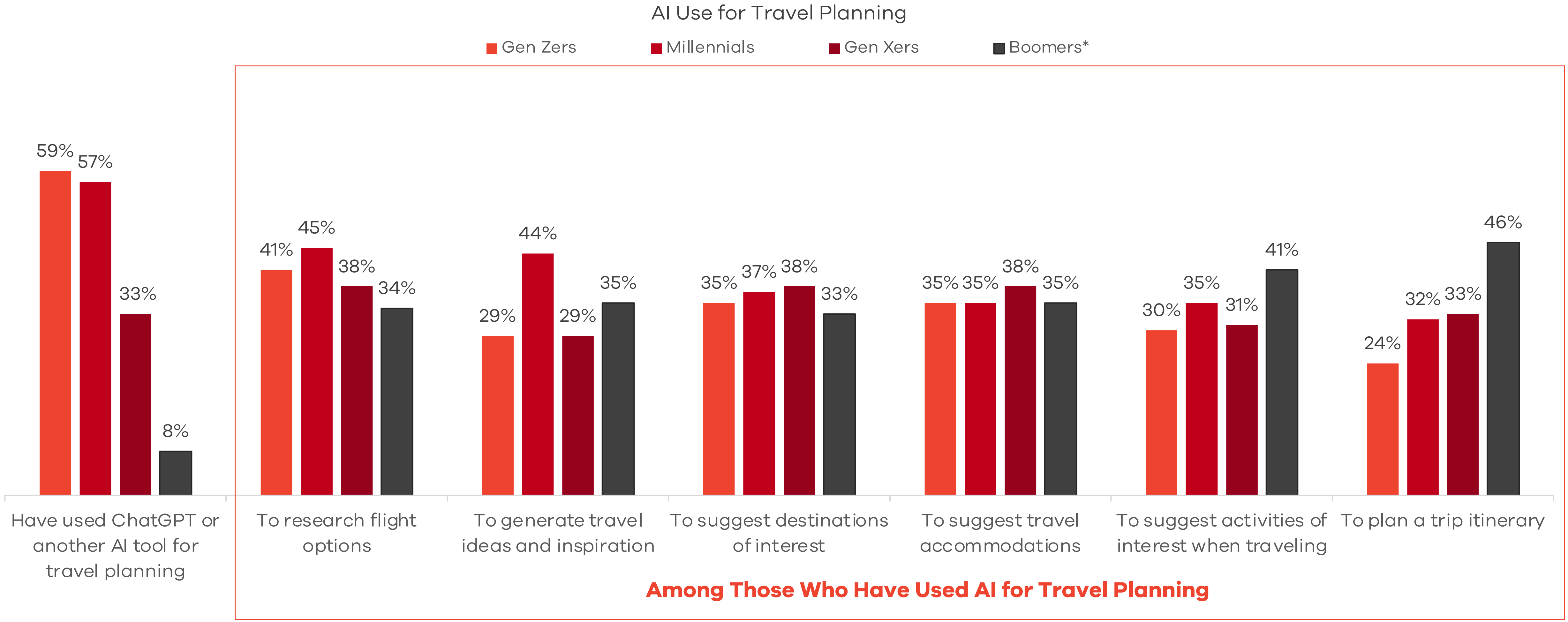
The Most Popular Uses of AI When Travel Planning Are to Research Flight Options, to Generate Travel Ideas and Inspiration, or to Suggest Destinations of Interest.

34%

of active leisure travelers have used ChatGPT or another AI tool for travel planning.

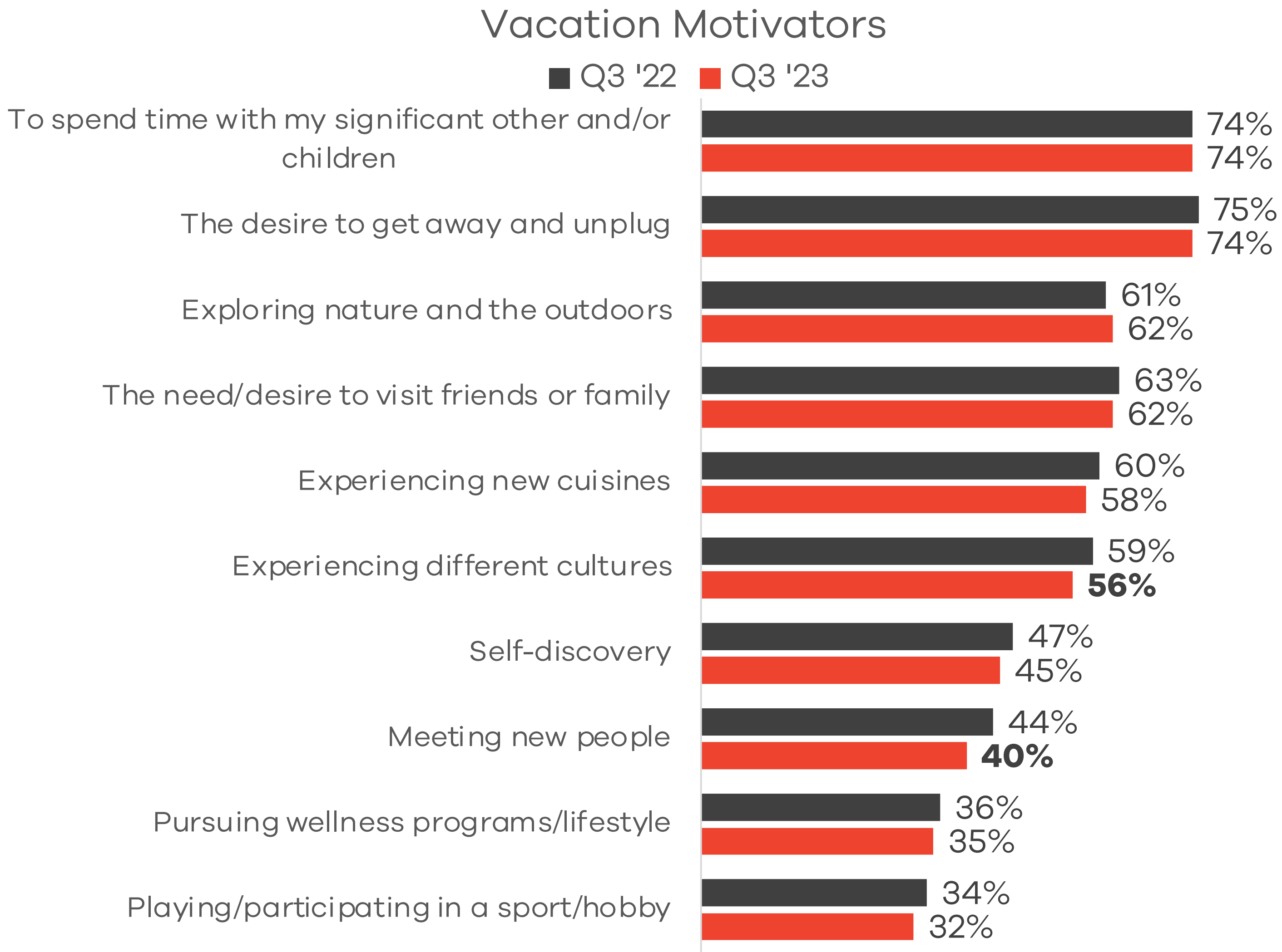
Base: Active leisure travelers (n=3,294); those who have used ChatGPT or another AI tool for travel planning (n=1,109)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

As Would Be Expected, Younger Generations Are Significantly More Likely to Use AI for Travel Planning.



* Small sample size – Interpret with caution
Base: Those who have used ChatGPT or another AI tool for travel planning (Gen Zers: n=241; Millennials: n=526; Gen Xers: n=252; Boomers: n=85)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

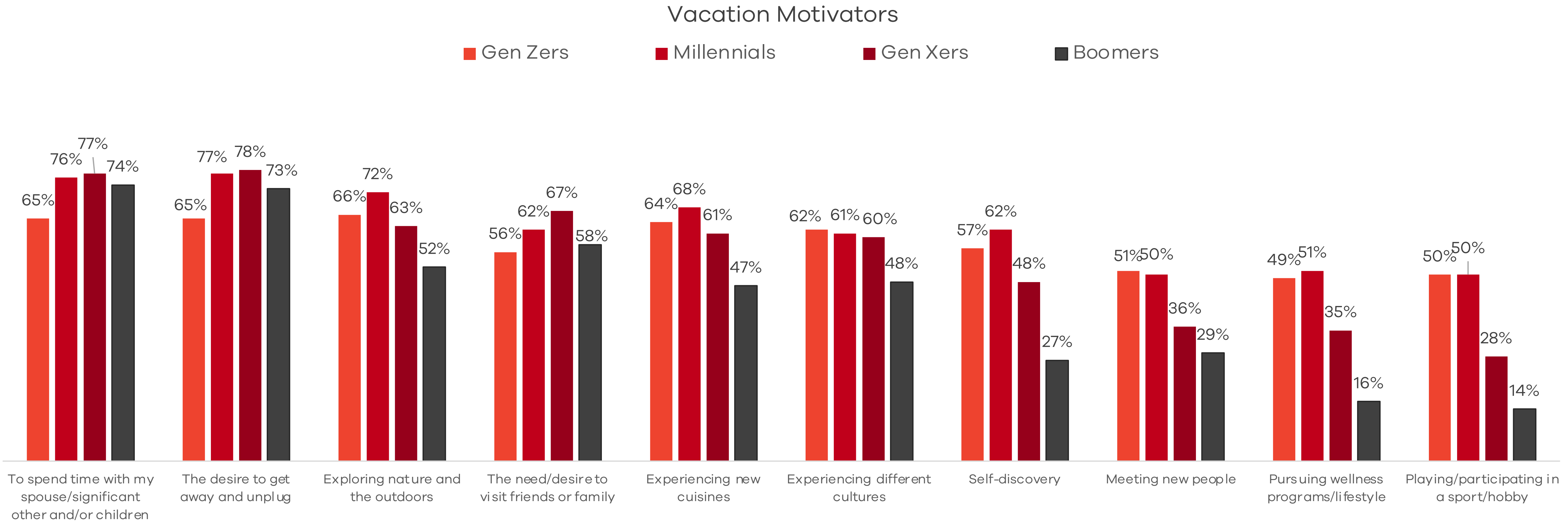
Spending Time With Family and "Unplugging" Continue to Be Top Motivators to Travel.



Data in bold indicates a statistically significant difference from Q3 2022.
Base: Active leisure travelers (n=3,294)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

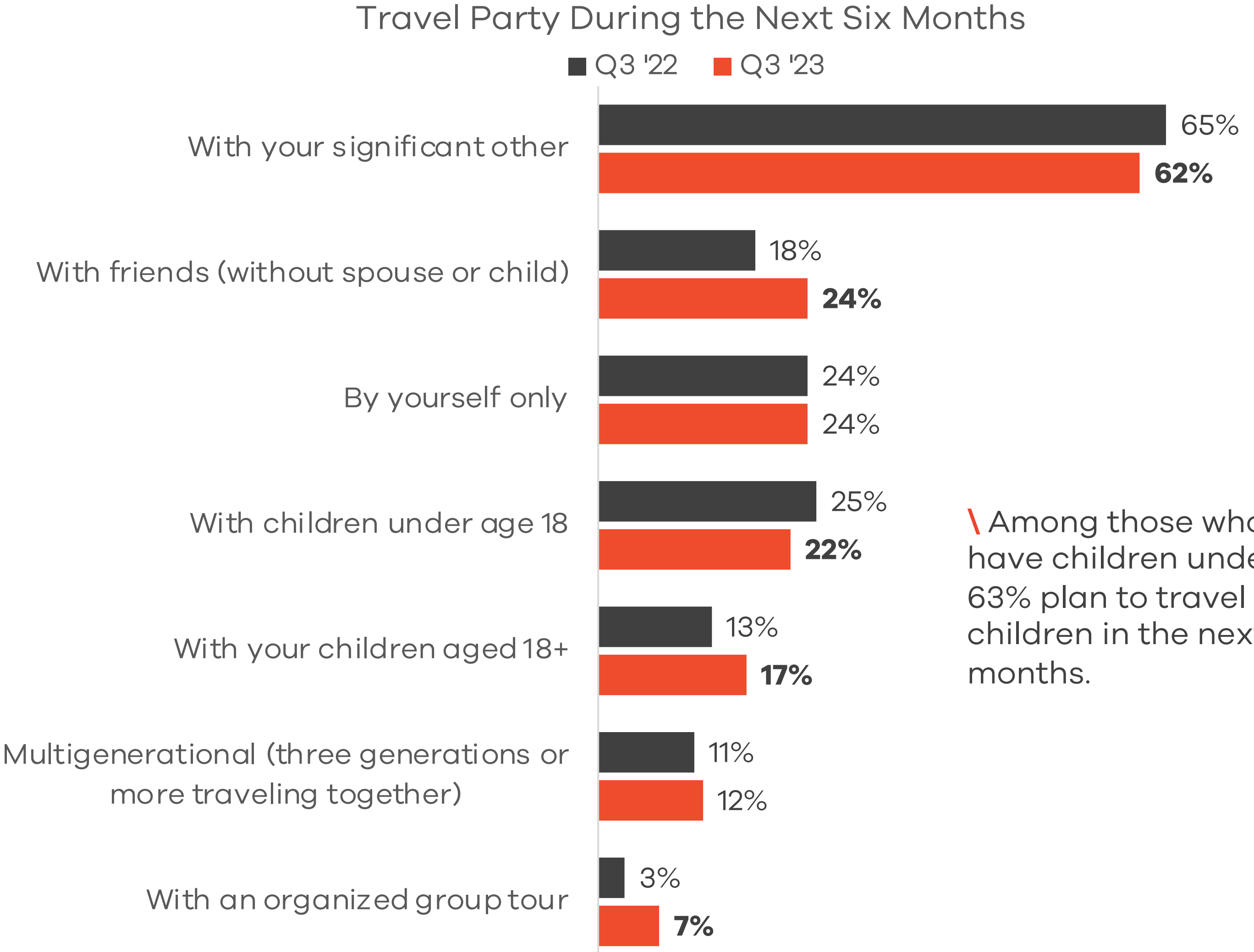
MMGY Travel Intelligence

While the Desire to Unplug and to Spend Time With Family Are Top Motivations Among All Generations, Younger Generations Are Also Motivated to Explore Nature, Experience New Cuisines and Different Cultures, and by Self-Discovery.



Base: Active leisure travelers (Gen Zers: n=410; Millennials: n=923; Gen Xers: n=775; Boomers: n=1,065)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Couples Travel Remains the Most Common Form of Travel.



Among those who have children under 18, 63% plan to travel with children in the next six months.

Data in bold indicates a statistically significant difference from Q3 2022.

Base: Active leisure travelers who intend to travel during the next six months (n=2,651)

Source: MMGY Global's 2023 *Portrait of American Travelers®* "Fall Edition"

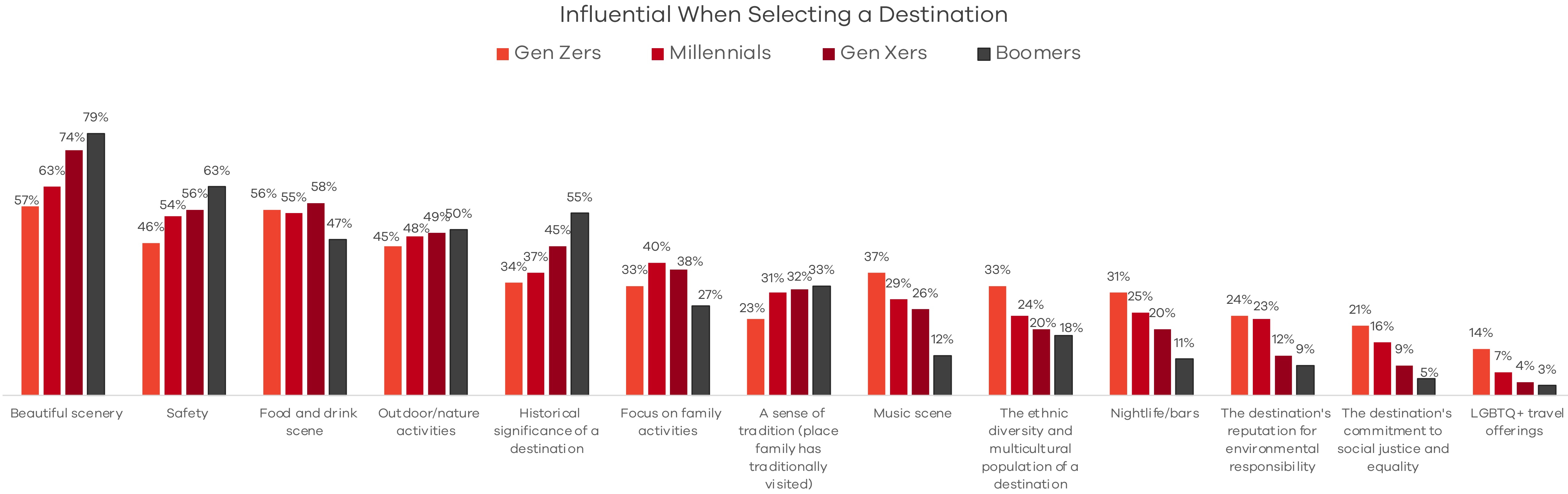
MMGY Travel Intelligence

Scenery and Safety Continue to Be the Most Influential Factors When Selecting a Destination, Both Increasing From Last Year.

Influential When Selecting a Destination (Top-2 Box)	Q3 '22	Q3 '23
Beautiful scenery	65%	**70%**
Safety	53%	**57%**
Food and drink scene	52%	53%
Outdoor/nature activities	45%	**48%**
Historical significance of a destination	42%	**45%**
Focus on family activities	30%	**34%**
A sense of tradition (place family has traditionally visited)	25%	**32%**
Music scene	21%	23%
The ethnic diversity and multicultural population of a destination	21%	22%
Nightlife/bars	16%	**19%**
The destination's reputation for environmental responsibility	14%	**16%**
The destination's commitment to social justice and equality	14%	**11%**
LGBTQ+ travel offerings	5%	6%

Data in bold indicates a statistically significant difference from Q3 2022.
Base: Active leisure travelers (n=3,294)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Fall Edition"

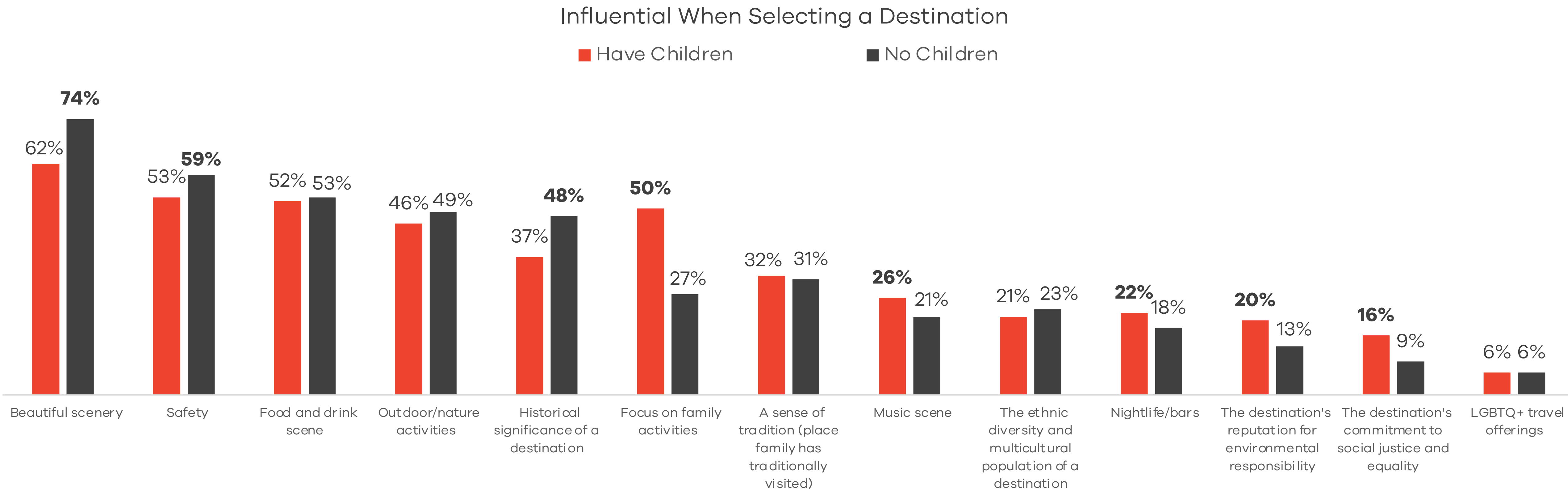
Younger Generations Are More Likely to Be Influenced by the Music Scene, the Diversity and the Environmental Responsibility of a Destination Than Their Older Counterparts, While Older Generations Are More Likely to Be Influenced by Beautiful Scenery, Safety and the Historical Significance of a Destination.



Base: Active leisure travelers (Gen Zers: n=410; Millennials: n=923; Gen Xers: n=775; Boomers: n=1,065)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

MMGY Travel Intelligence

Travelers Without Children Are More Likely to Be Influenced By Scenery, Safety and the Historical Significance of a Destination, While More of Those With Children Are Influenced By a Focus on Family Activities, the Music Scene and Nightlife of the Destination, Its Reputation for Environmental Responsibility and Its Commitment to Social Justice.



Base: Active leisure travelers (Have children: n=1,054; No children: n=2,239)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Top Activities of Interest on Vacation

Top 25	Q3 '22	Q3 '23
Beach experiences	47%	53%
Historical sites	45%	49%
Visiting a state or national park	45%	48%
Shopping	43%	44%
Visiting a museum	39%	43%
Visiting a zoo or aquarium	36%	41%
Visiting a theme or amusement park	31%	34%
Dining cruise	27%	32%
Attending a concert/music festival	26%	31%
Visiting notable architectural sites	30%	31%
Food tours	NA	30%
Hiking/climbing/biking/other outdoor adventures	27%	29%
Guided tours with access to local experiences that are otherwise inaccessible	25%	29%
Casino gambling	27%	27%
Attending a sporting event	18%	25%
Camping	19%	25%
Dinner theater	21%	24%
Adventure travel	22%	24%
Nightlife	20%	23%
Spa services (massages, facials, etc.)	17%	22%
Exploring family's ancestry/past on a heritage vacation	19%	21%
Cooking, wine or cocktail classes	NA	21%
Attending performing arts events	16%	19%
Water sports (waterskiing, boating/rafting)	18%	19%
Film/art festivals	16%	18%

NA: Option was not asked in Q3 2022

Base: Active leisure travelers (n=3,294)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Beach Experiences and Visiting State or National Parks Are Top Activities of Interest for All Generations.

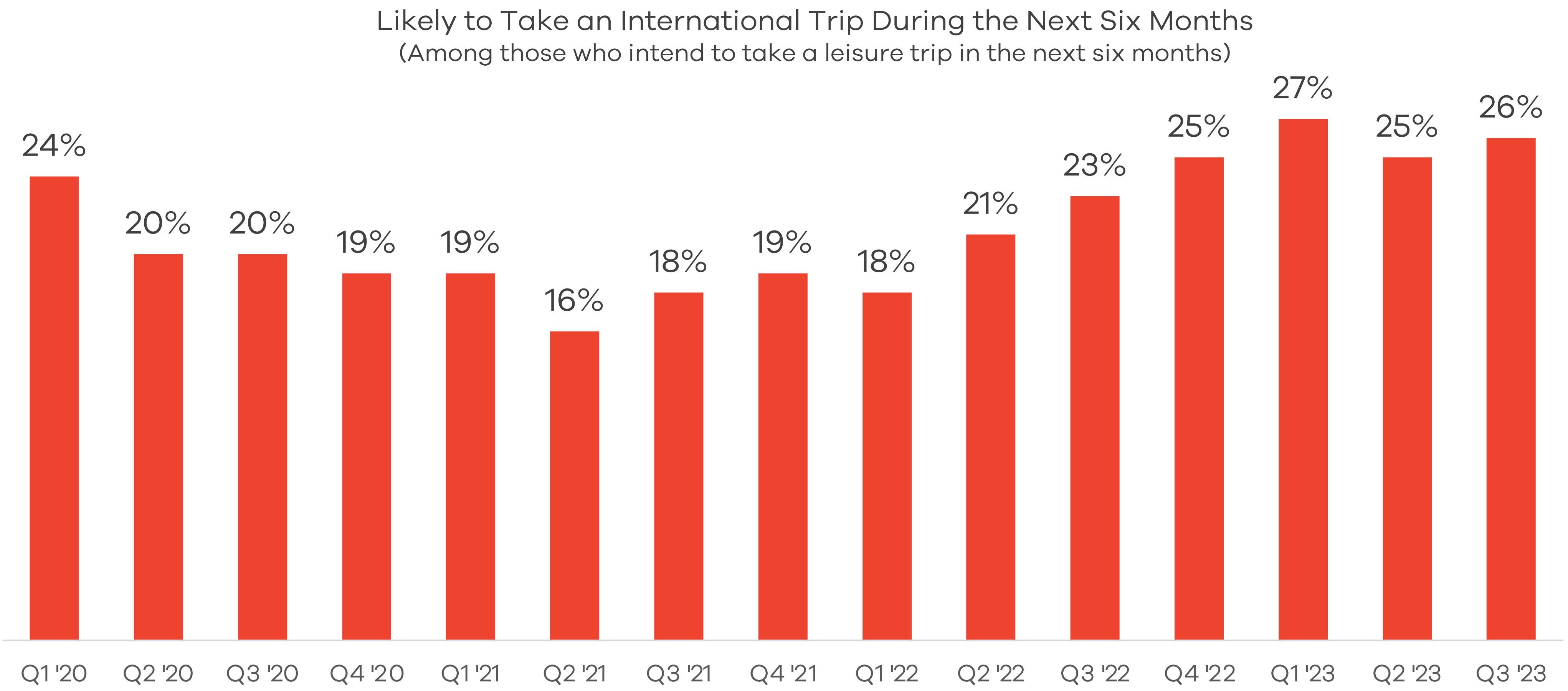
Top five vacation activities for each generation are shaded in black.

Interest in Vacation Activities (Top 20)	Gen Zers	Millennials	Gen Xers	Boomers
Beach experiences	41%	48%	59%	58%
Historical sites	31%	36%	53%	63%
Visiting a state or national park	39%	42%	52%	55%
Shopping	43%	43%	46%	44%
Visiting a museum	32%	35%	43%	53%
Visiting a zoo or aquarium	39%	34%	42%	46%
Visiting a theme or amusement park	38%	39%	39%	27%
Dining cruise	29%	28%	34%	36%
Attending a concert/music festival	33%	31%	34%	28%
Visiting notable architectural sites	23%	29%	32%	36%
Food tours	33%	29%	35%	28%
Hiking/climbing/biking/other outdoor adventures	31%	33%	32%	24%
Guided tours with access to local experiences that are otherwise inaccessible	25%	23%	30%	34%
Casino gambling	15%	22%	34%	31%
Attending a sporting event	23%	29%	27%	21%
Camping	28%	34%	28%	17%
Dinner theater	25%	20%	26%	25%
Adventure travel	35%	32%	28%	13%
Nightlife	38%	28%	24%	13%
Exploring family's ancestry/past on a heritage vacation	21%	24%	22%	19%

Base: Active leisure travelers (Gen Zers: n=410; Millennials: n=923; Gen Xers: n=775; Boomers: n=1,065)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"


International
Travel Intentions
MMGY Travel Intelligence

Likelihood to Take an International Trip Is up From This Time Last Year.



Base: Active leisure travelers who intend to travel during the next six months (n=2,651)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Fall Edition"

Measured Interest in International Travel Is Unchanged From a Year Ago.

79% 2022 **79%** 2023

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

Gen Zers: **90%**
Millennials: **86%**
Gen Xers: 76%
Boomers: 71%

Have Kids: **85%**
Don't Have Kids: 76%

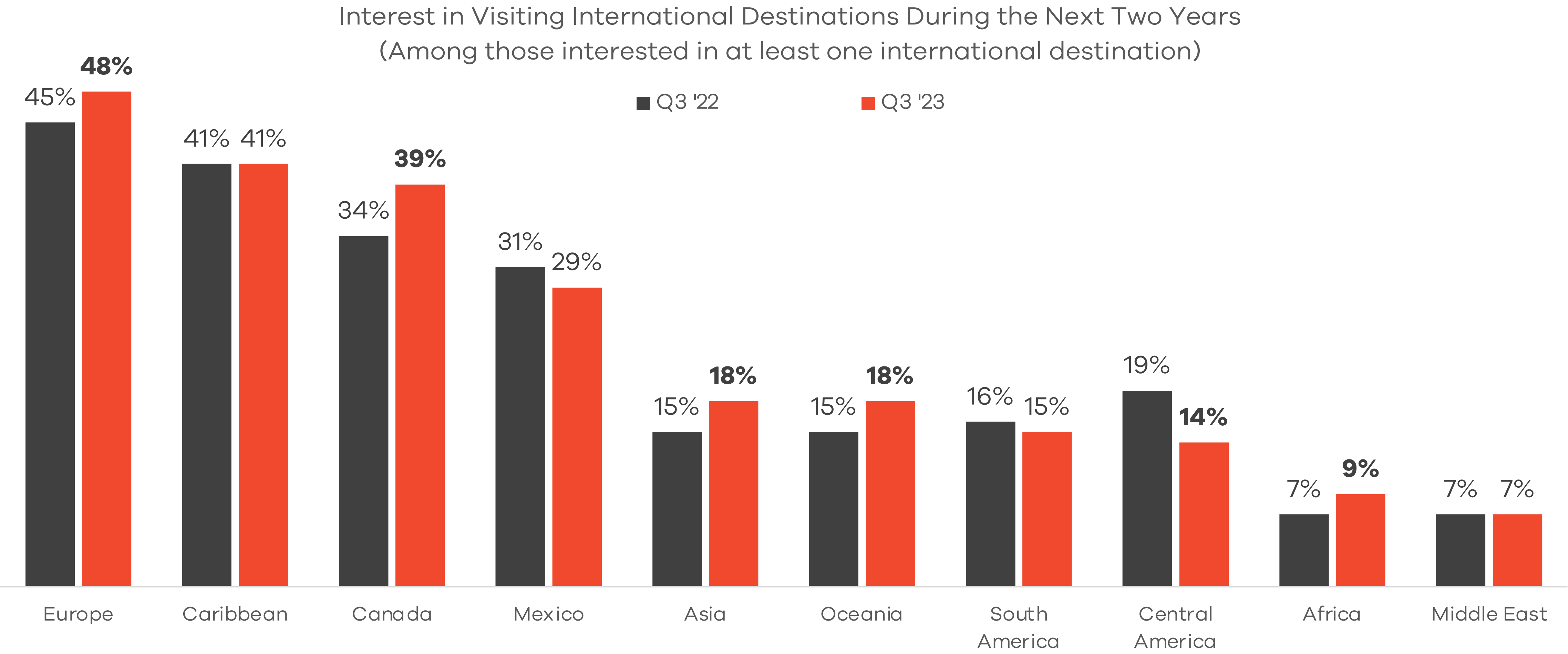
Less Than $100K: 73%
$100K or more: **84%**

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

Base: Active leisure travelers (n=3,294)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Fall Edition"

MMGY Travel Intelligence

Interest in Visiting Europe, Canada, Asia, Oceania and Africa Have Increased From One Year Ago.

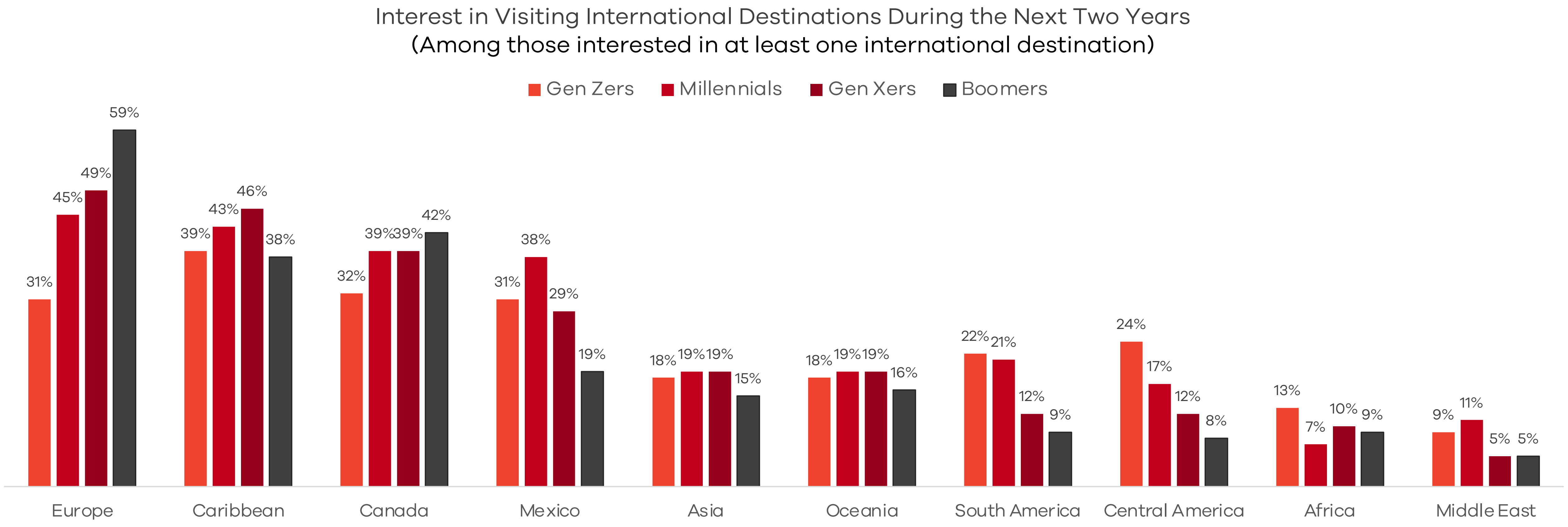


Data in bold indicates a statistically significant difference from 2022.
Base: Active leisure travelers interested in at least one international destination (n=2,591)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

MMGY Travel Intelligence

Interest in Many International Destinations Varies by Generation.

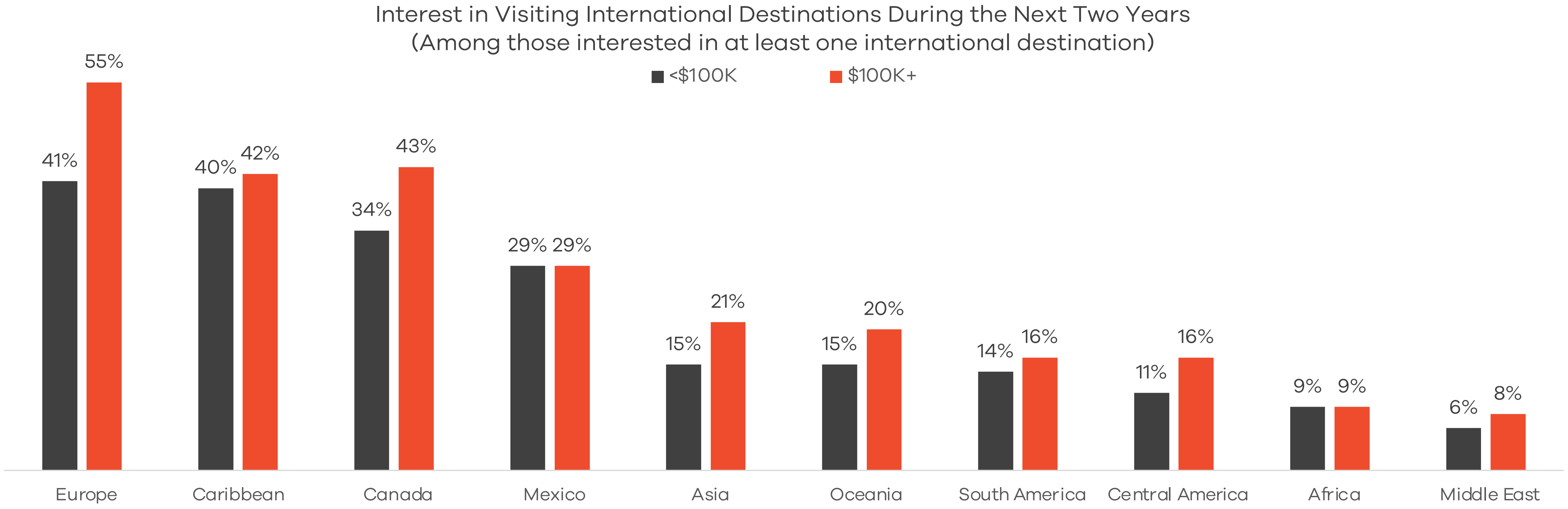
/ Popular international destinations are more appealing to older travelers while less popular destinations like South America and Central America are more appealing to younger travelers.



Base: Active leisure travelers interested in at least one international destination (Gen Zers: n=371; Millennials: n=796; Gen Xers: n=590; Boomers: n=754)

Source: MMGY Global's 2023 *Portrait of American Travelers®* "Fall Edition"

More Travelers With Household Incomes of $100K or More Are Interested in Nearly All International Destinations Compared to Those Making Less Than $100K.



Data in bold indicates a statistically significant difference from the other group.
Base: Active leisure travelers interested in at least one international destination (<$100K: n=1,219; >$100K: n=1,373)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Fall Edition"

MMGY Travel Intelligence

Destinations of Interest in the Caribbean, Mexico and Canada During the Next Two Years

Caribbean Destinations Interested in Visiting During the Next Two Years	Q3 '22	Q3 '23
The Bahamas	54%	55%
U.S. Virgin Islands	43%	44%
Jamaica	35%	**43%**
Puerto Rico	32%	36%
Aruba	33%	34%
Cayman Islands	34%	32%
St. Maarten/St. Martin	31%	30%
Barbados	27%	29%
Dominican Republic	23%	**28%**
Bermuda	23%	**28%**
British Virgin Islands	22%	22%
Antigua	20%	**16%**
Cuba	13%	13%
Other	4%	2%

Mexico Destinations Interested in Visiting During the Next Two Years	Q3 '22	Q3 '23
Cancún	58%	58%
Los Cabos/Cabo San Lucas	41%	39%
Puerto Vallarta	33%	**39%**
Mexico City	36%	36%
Cozumel	30%	32%
Riviera Maya	26%	29%
Guadalajara	13%	**19%**
Other	5%	5%

Canada Destinations Interested in Visiting During the Next Two Years	Q3 '22	Q3 '23
Toronto	49%	**56%**
Vancouver	48%	**55%**
Montreal	43%	47%
Quebec	36%	**45%**
Victoria	29%	27%
Ottawa	15%	**21%**
Banff	21%	19%
Whistler	17%	15%
Other	9%	6%

Data in bold indicates a statistically significant difference from 2022.
Base: Active leisure travelers interested in visiting the Caribbean (n=1,063); Mexico (n=746); Canada (n=1,002)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Respondent Demographics

Traveler Personas

Percent Who Self-Identify With Each Descriptor

	Q3 '22	Q3 '23
Beach lover	39%	**44%**
Pet lover	35%	**40%**
Foodie	37%	36%
Family traveler	31%	**35%**
Travel bargain hunter	28%	29%
Sports fan/enthusiast	24%	**27%**
Outdoor adventurer	23%	**26%**
Conservative (politically)	22%	24%
Moderate (politically)	24%	23%
Theme park enthusiast	20%	21%
Concert/festival enthusiast	17%	**21%**
World traveler	21%	20%
Cruise lover	21%	20%
Environmentally conscious	19%	19%
Liberal (politically)	19%	19%
All-inclusive resort enthusiast	17%	**19%**
Wine enthusiast	18%	17%
Video game enthusiast	NA	16%
Luxury traveler	16%	15%
Cocktail enthusiast	NA	14%
Recreational cannabis user	9%	**12%**
Golf enthusiast	10%	9%
Social justice activist	9%	8%
Road warrior (business travel)	6%	5%
Ski/snowboard enthusiast	6%	5%

NA: Option was not asked in Q3 2022

Base: Active leisure travelers (n=3,294)

Source: MMGY Global's 2023 *Portrait of American Travelers®* "Fall Edition"

Respondent Demographics

	Active Leisure Travelers	Gen Zers	Millennials	Gen Xers	Boomers
Male	52%	50%	54%	48%	53%
Female	47%	46%	45%	52%	47%
Other	1%	5%	1%	0%	0%
Gen Zers	12%	100%	-	-	-
Millennials	28%	-	100%	-	-
Gen Xers	24%	-	-	100%	-
Boomers	32%	-	-	-	100%
Household income (median)	$98.7K	$87.6K	$90.0K	$100.8K	$108.6K
Have children under 18 at home	32%	29%	64%	39%	4%
White	76%	47%	69%	83%	86%
Hispanic	15%	21%	25%	15%	5%
African American/Black	13%	38%	15%	7%	6%
Asian	7%	8%	8%	7%	6%
Native American	2%	3%	2%	2%	1%
Pacific Islander	1%	3%	3%	1%	0%
Other	3%	5%	4%	3%	2%

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Respondent Demographics

	Active Leisure Travelers	Gen Zers	Millennials	Gen Xers	Boomers
Married/living together	67%	33%	70%	70%	74%
Never married	20%	61%	24%	15%	7%
Divorced/separated/widowed	13%	5%	5%	15%	19%
4 years or less of high school	30%	48%	29%	29%	26%
1–3 years of college	29%	26%	24%	27%	34%
4 years of college	26%	19%	29%	29%	25%
Some graduate school	3%	4%	4%	3%	3%
Graduate/professional degree	12%	4%	14%	12%	12%
Employed (full time or part time)	59%	64%	85%	74%	29%
Retired	27%	0%	1%	9%	66%
Temporarily unemployed	5%	15%	4%	6%	2%
Homemaker (full time)	7%	5%	9%	10%	4%
Student	3%	15%	2%	1%	0%

Source: MMGY Global's 2023 *Portrait of American Travelers®* "Fall Edition"

MMGY Travel Intelligence
Chris Davidson
EVP, MMGY Travel Intelligence
CDavidson@MMGYIntel.com

Chelsea Bachman
Senior Research Account Manager
CBachman@MMGYIntel.com

Ashley Adams
Research Account Manager
AAdams@MMGYIntel.com
THANK YOU