PORTRAIT OF AMERICAN TRAVELERS®

Spring 2023

MMGY Travel Intelligence

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MMGY Travel Intelligence

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 4,530 U.S. adults in February 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 3,146 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.

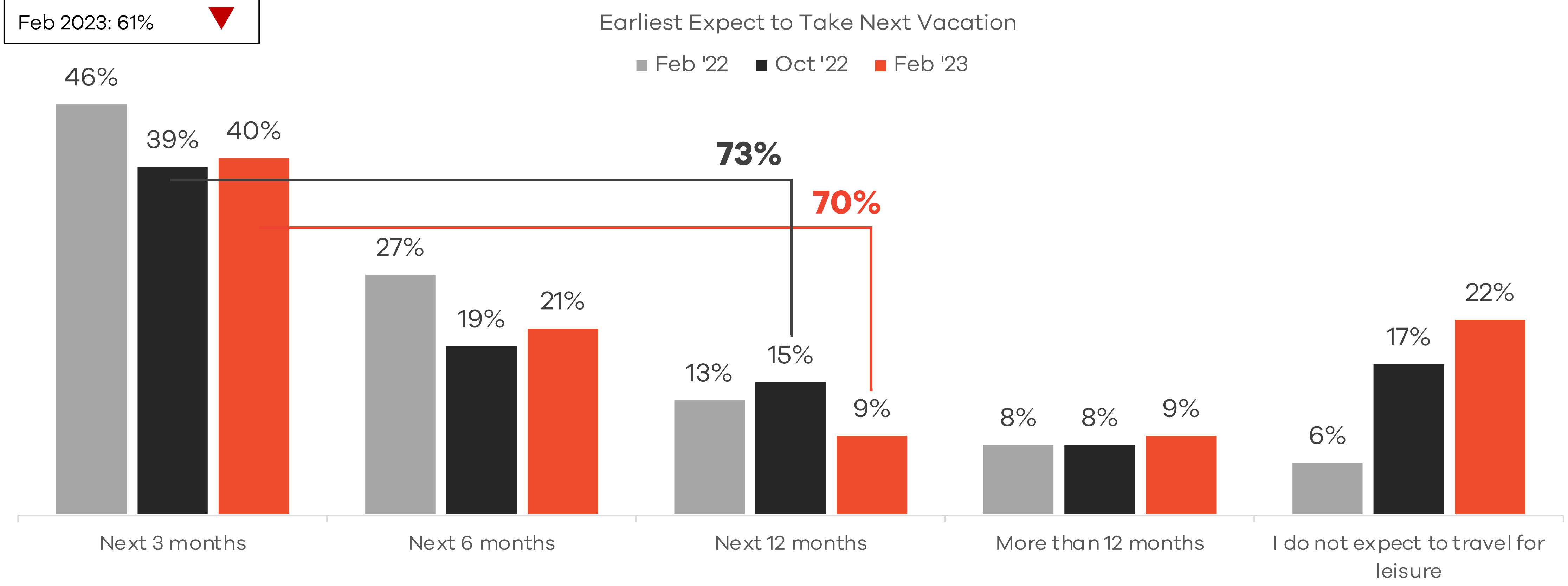
The error interval of the statistical estimates appearing in this report (for n=3,146) is +/- 1.72% at the 95% level of confidence.

Generation	Age	% of Respondents
Gen Zers	18–24	11%
Millennials	25–40	30%
Gen Xers	41–56	23%
Boomers	57–75	32%
Silent/GI	76+	4%


Travel
Outlook
Snapshot
MMGY Travel Intelligence

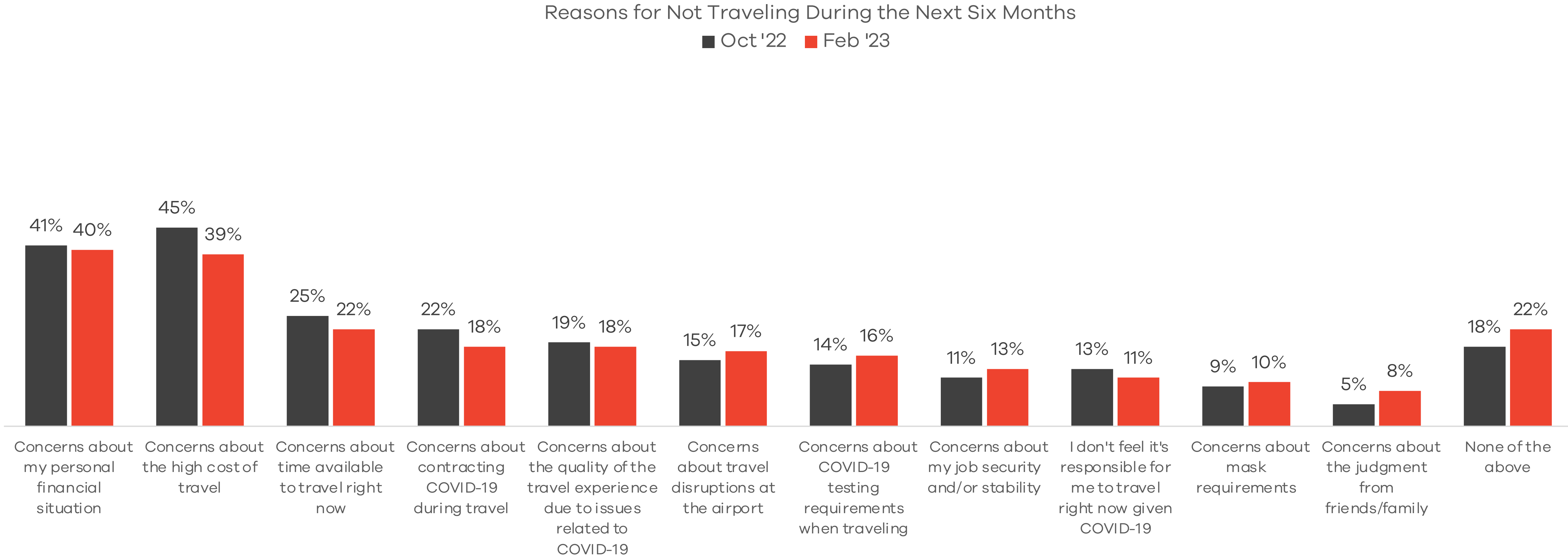
Travel Intentions in the Next Year Continue to Display Slight Decreases From Previous Waves.

Sum of Next 6 Months
Feb 2022: 73%
Feb 2023: 61%



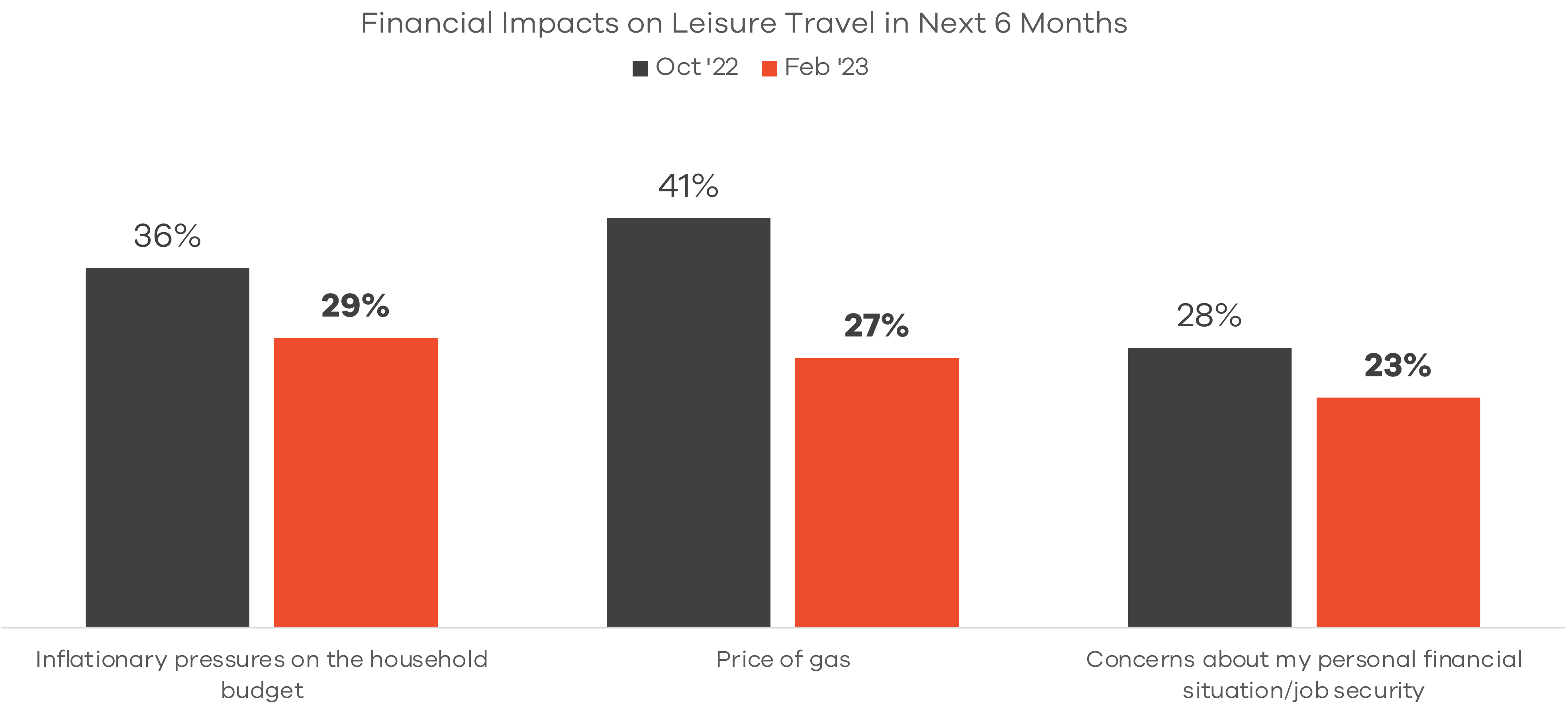
Base: U.S. adults (n=4,530)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Spring Edition"

Concerns About Personal Finances and the High Cost of Travel Continue to Impact Short-Term Travel Decisions for Those Not Planning to Travel.



Base: Active leisure travelers without travel plans during the next six months (n=401)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

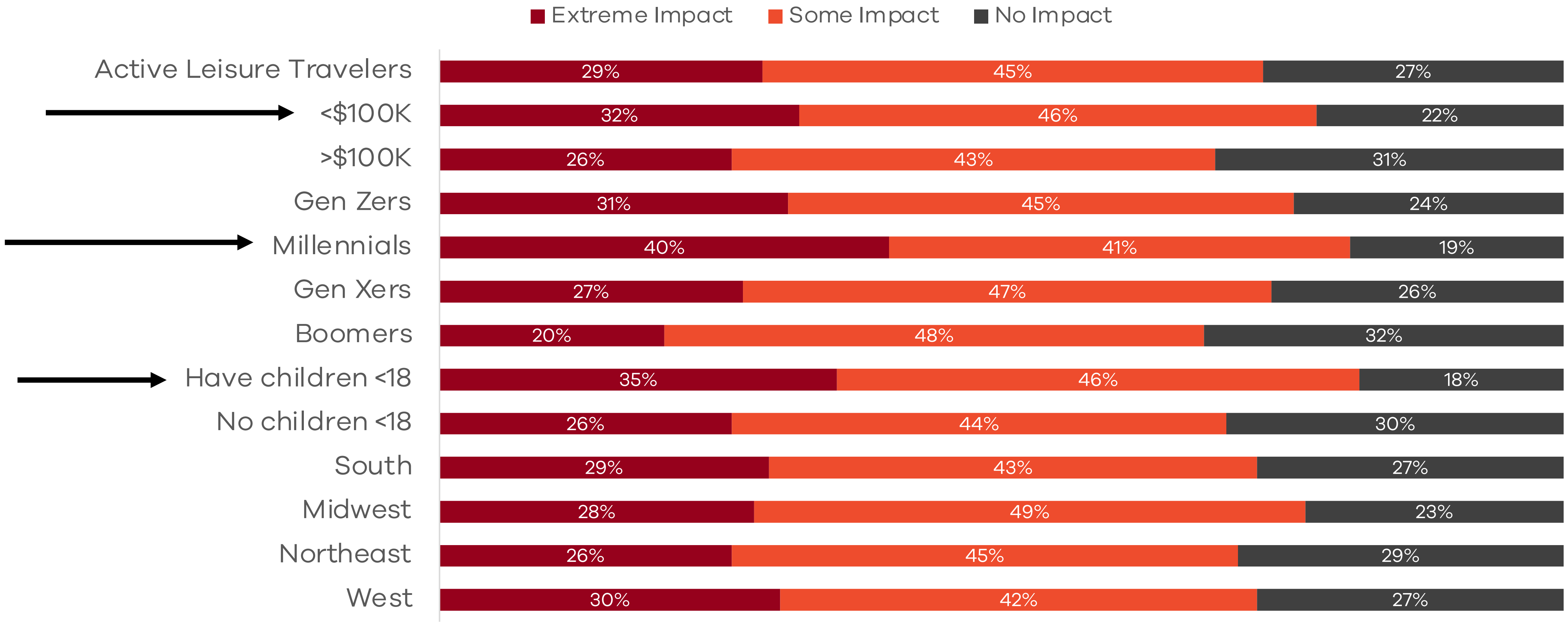
Those Planning to Travel Are Less Impacted by These Financial Factors Than They Were in October 2022.



Data in bold indicates a statistically significant difference from October 2022.
Base: Active leisure travelers (n=3,146)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Spring 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=3,146)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Spring Edition"

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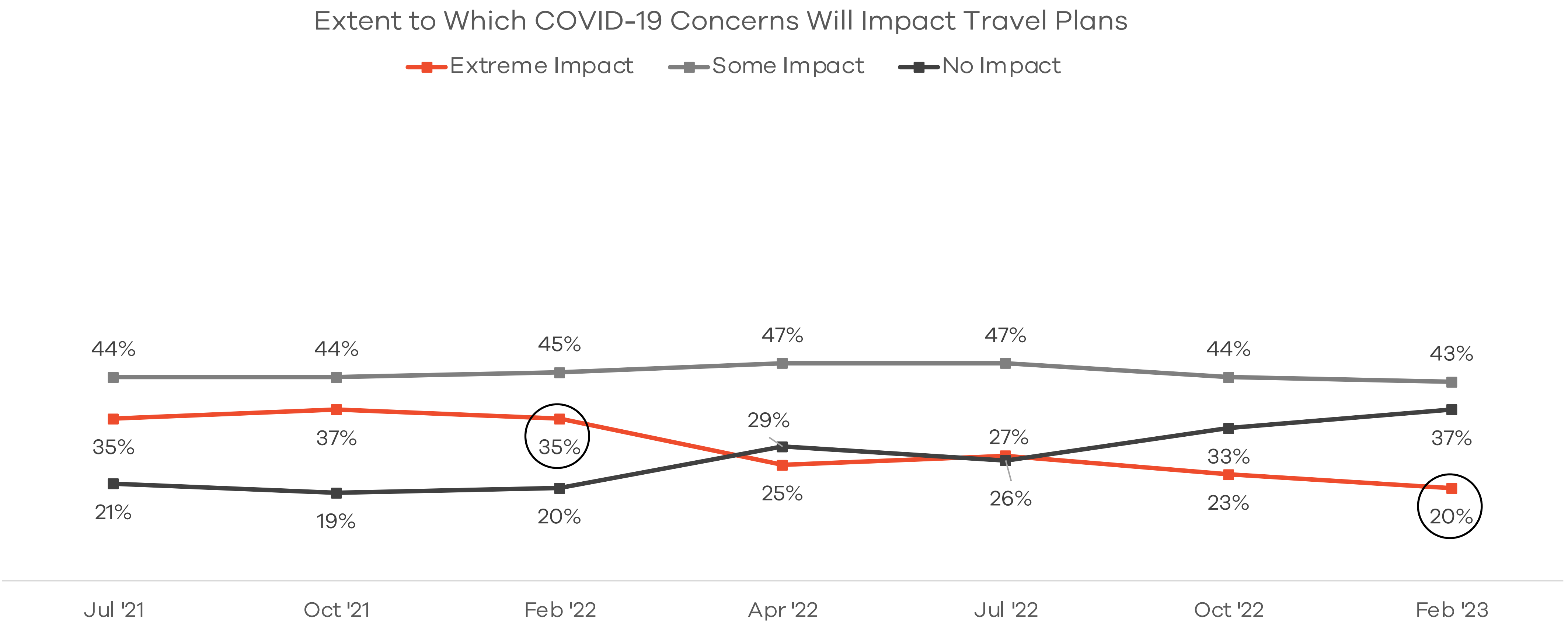
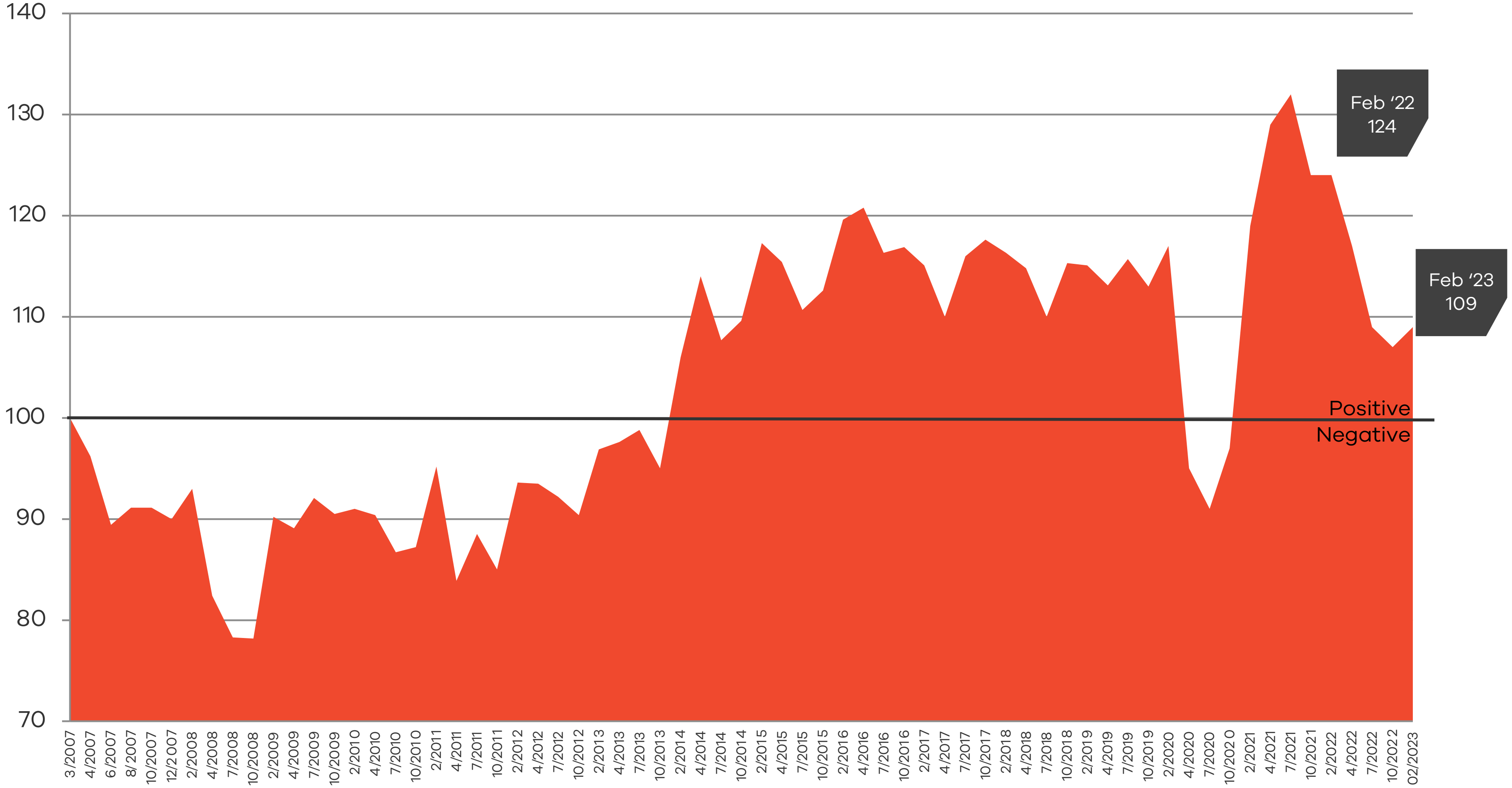
Concerns of COVID-19 Continue to Decrease.



Base: Active leisure travelers (n=3,146)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Spring Edition"

MMGY Travel Intelligence

Traveler Sentiment Index™ (TSI): Down From One Year Ago but Up Slightly From October 2022



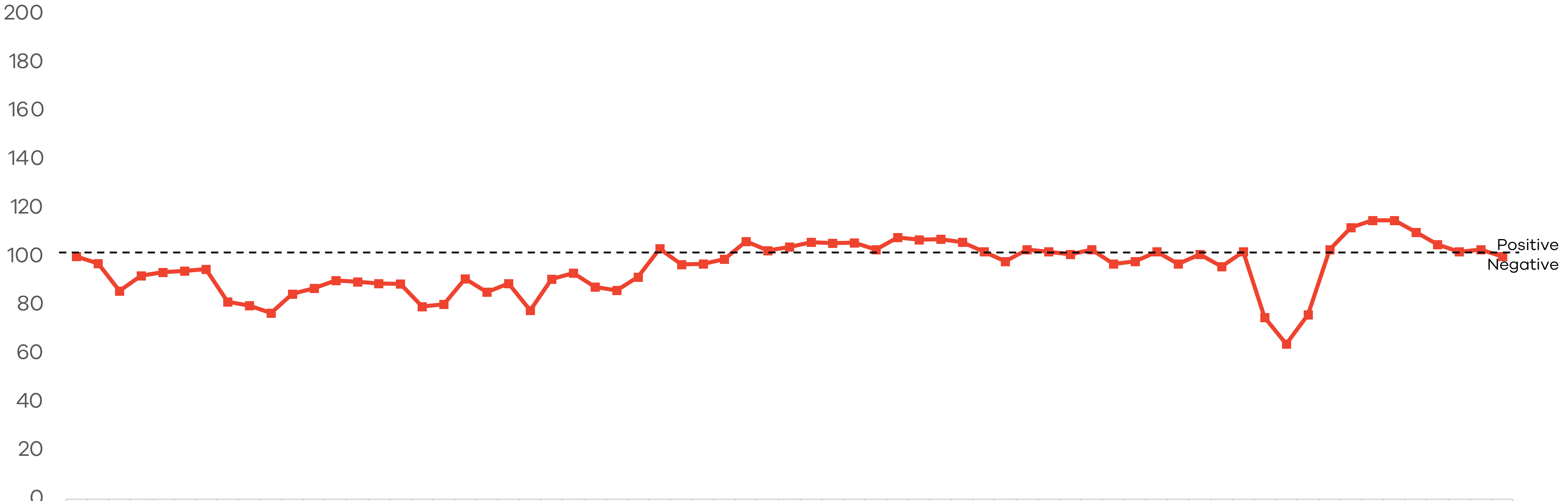
/ The Traveler Sentiment Index™ (TSI) consists of six variables, including: interest in travel, time available for travel, personal finances available for travel, affordability of travel, quality of service and safety of travel. It provides a glimpse into how U.S. adults are feeling about travel this 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=4,530)
Source: MMGY Global's *travelhorizons*™/2023 *Portrait of American Travelers*® "Spring 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
U.S. Adults	100	97	86	92	94	94	95	82	80	77	85	87	90	90	89	89	80	80	91	85	89	78

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

	Jul 17	Oct 17	Feb 18	Apr 18	Jul 18	Oct 18	Feb 19	Apr 19	Jul 19	Oct 19	Feb 20	Apr 20	Jul 20	Oct 20	Feb 21	Apr 21	Jul 21	Oct 21	Feb 22	Apr 22	Jul 22	Oct 22	Feb 23
U.S. Adults	103	102	101	103	97	98	102	97	101	96	102	75	64	76	103	112	115	115	110	105	102	103	100

Traveler Sentiment Index™

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

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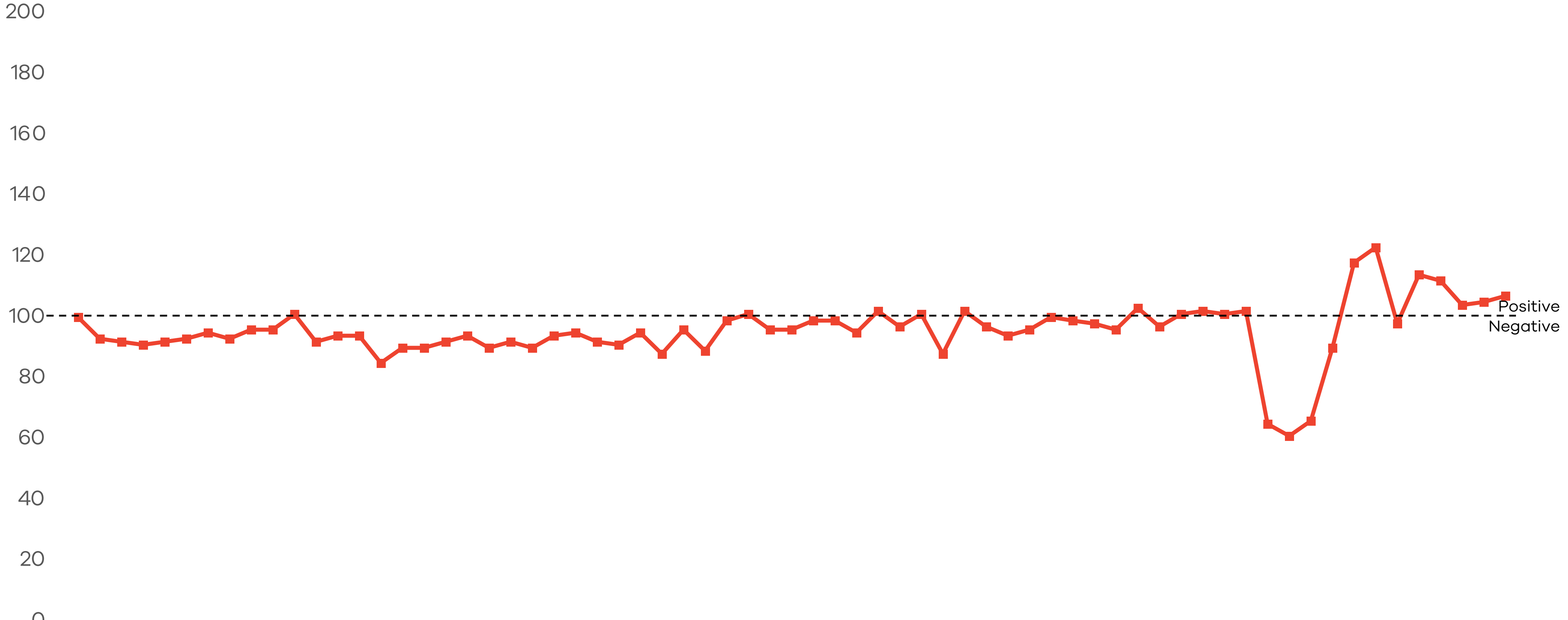
Index 2: Safety of Travel



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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

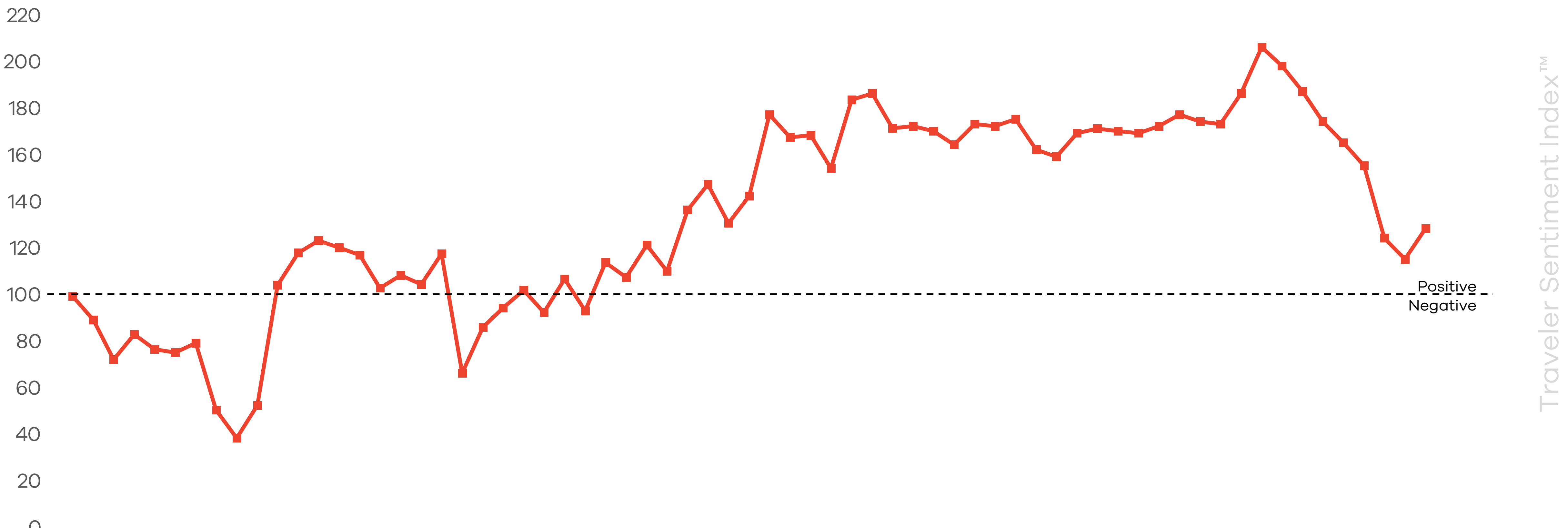
	Feb 18	Apr 18	Jul 18	Oct 18	Feb 19	Apr 19	Jul 19	Oct 19	Feb 20	Apr 20	Jul 20	Oct 20	Feb 21	Apr 21	Jul 21	Oct 21	Feb 22	Apr 22	Jul 22	Oct 22	Feb 23
U.S. Adults	99	98	96	103	97	101	102	101	102	65	61	66	90	118	123	98	114	112	104	105	107

Traveler Sentiment Index™

MMGY Travel Intelligence

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

Index 3: Perceived Affordability of Travel



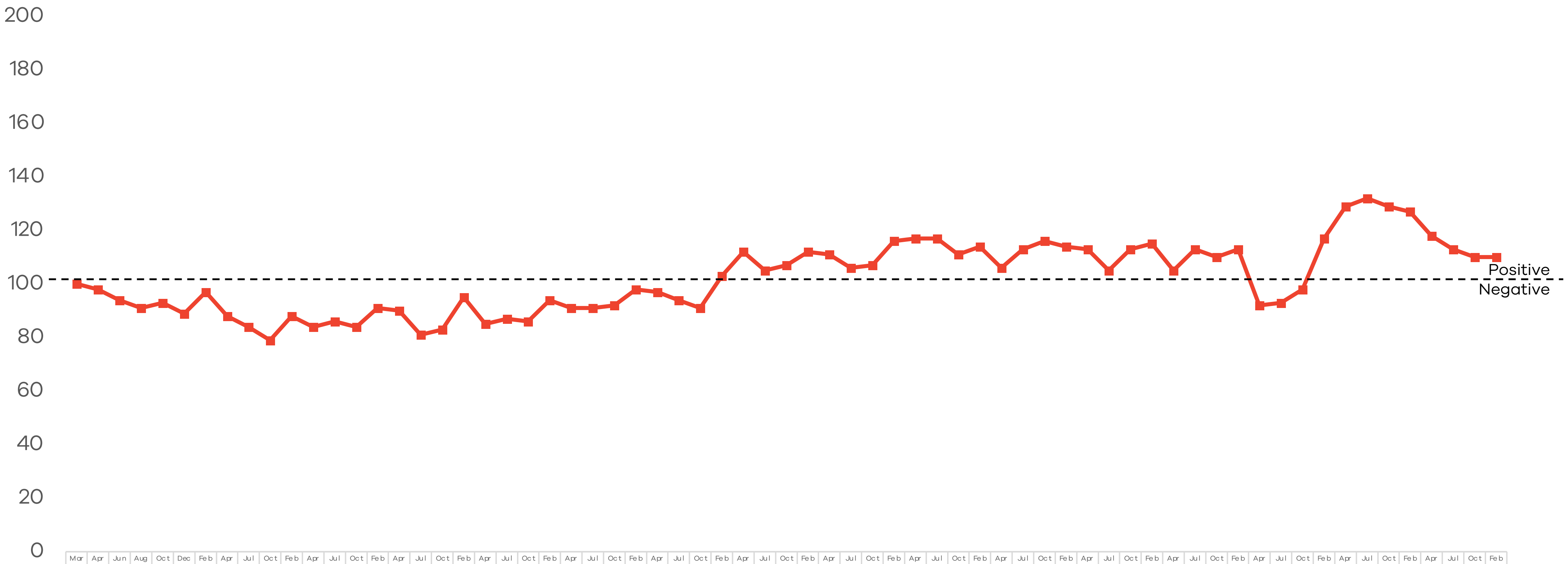
	Mar 07	Apr 07	Jun 07	Aug 07	Oct 07	Dec 07	Feb 08	Apr 08	Jul 08	Oct 08	Feb 09	Apr 09	Jul 09	Oct 09	Feb 10	Apr 10	Jul 10	Oct 10	Feb 11	Apr 11	Jul 11	Oct 11
U.S. Adults	100	90	73	84	77	76	80	51	39	53	105	119	124	121	118	104	109	105	118	67	87	95

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

	Jul 17	Oct 17	Feb 18	Apr 18	Jul 18	Oct 18	Feb 19	Apr 19	Jul 19	Oct 19	Feb 20	Apr 20	Jul 20	Oct 20	Feb 21	Apr 21	Jul 21	Oct 21	Feb 22	Apr 22	Jul 22	Oct 22	Feb 23
U.S. Adults	174	173	176	163	160	170	172	171	170	173	178	175	174	187	207	199	188	175	166	156	125	116	129

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

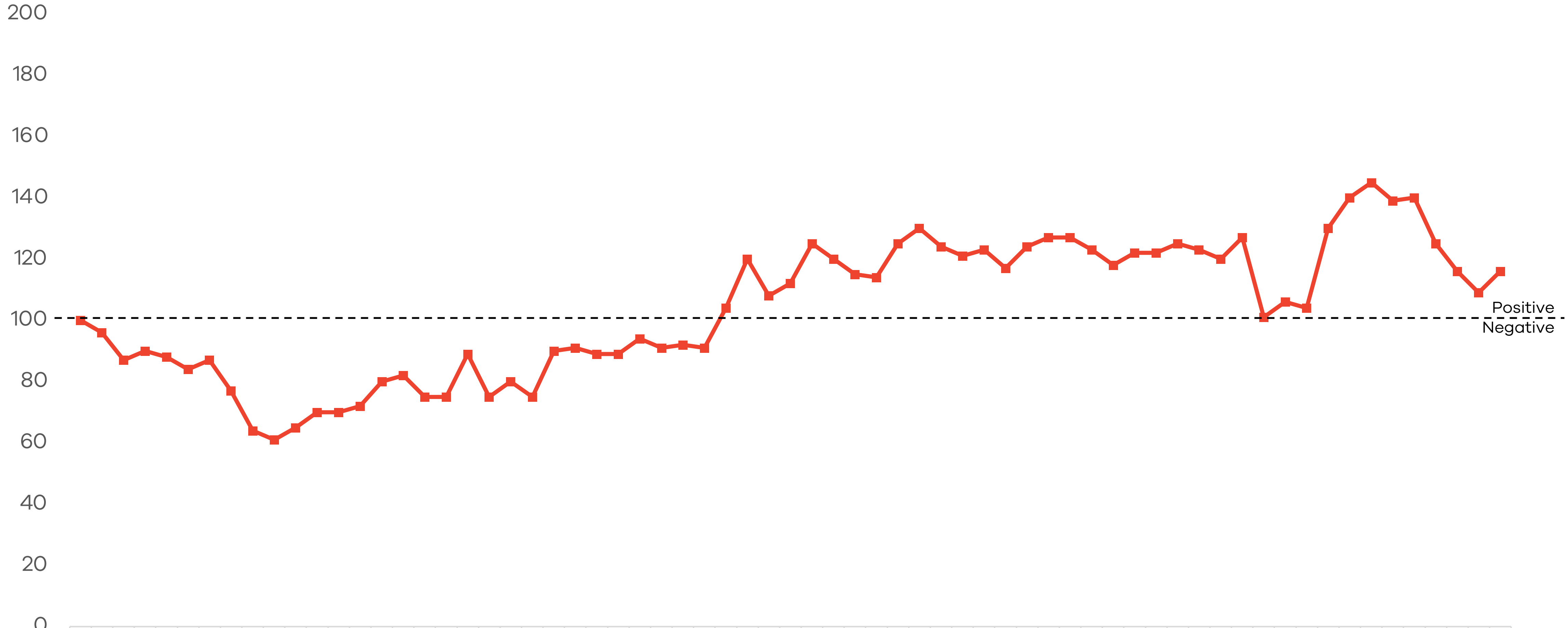
	Apr 12	Jul 12	Oct 12	Feb 13	Apr 13	Jul 13	Oct 13	Feb 14	Apr 14	Jul 14	Oct 14	Feb 15	Apr 15	Jul 15	Oct 15	Feb 16	Apr 16	Jul 16	Oct 16	Feb 17	Apr 17	Jul 17
U.S. Adults	91	91	92	98	97	94	91	103	112	105	107	112	111	106	107	116	117	117	111	114	106	113

	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	Feb 23
U.S. Adults	116	114	113	105	113	115	105	113	110	113	92	93	98	117	129	132	129	127	118	113	110	110

Traveler Sentiment Index™

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring 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	Feb 23
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	116

Traveler Sentiment Index™

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

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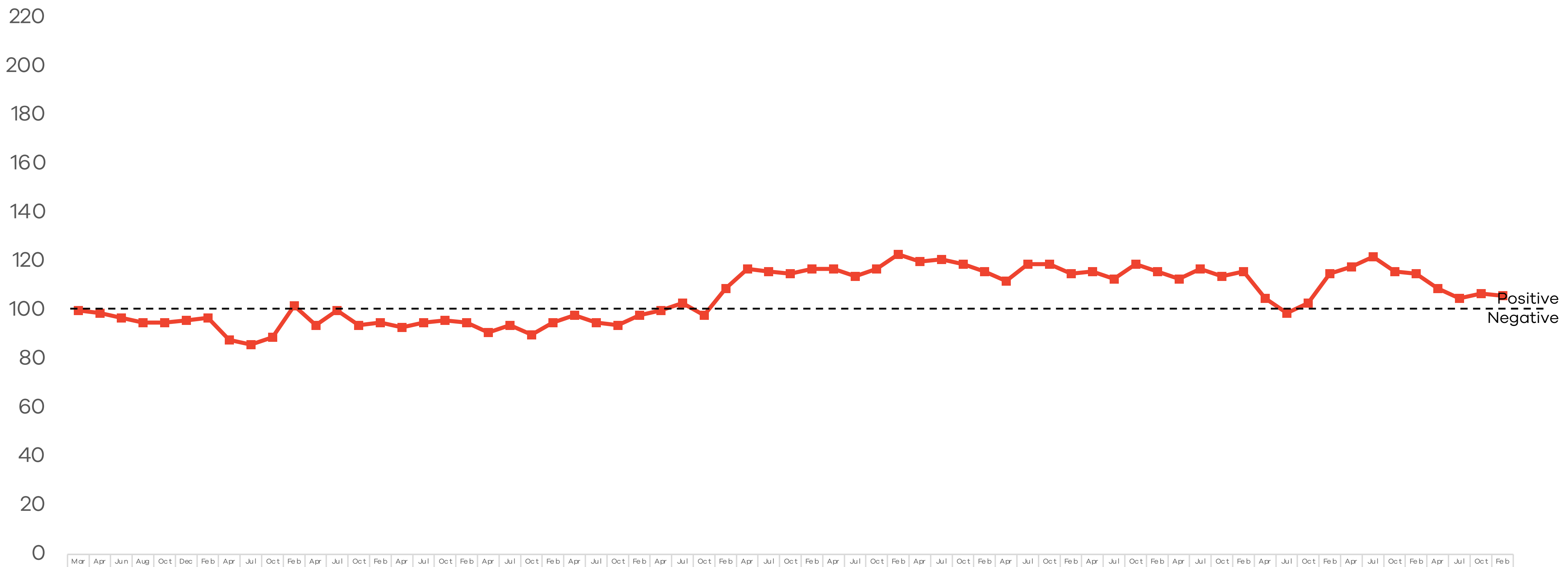
Index 6: Quality of Service



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

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

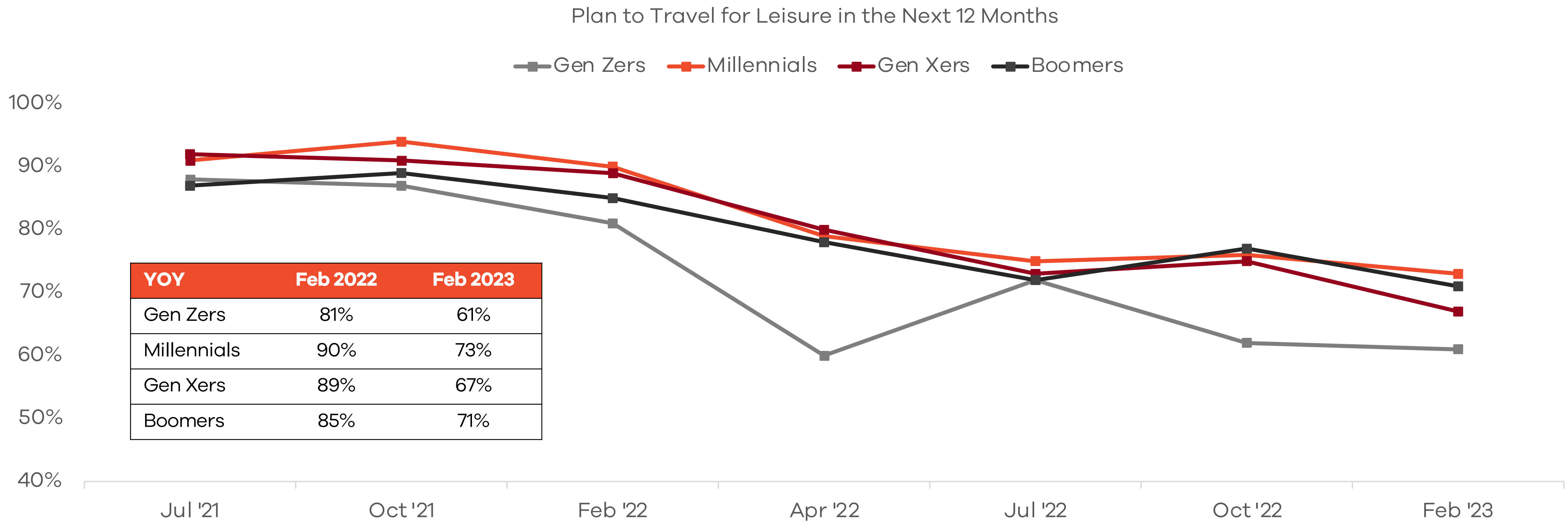
	Jul 17	Oct 17	Feb 18	Apr 18	Jul 18	Oct 18	Feb 19	Apr 19	Jul 19	Oct 19	Feb 20	Apr 20	Jul 20	Oct 20	Feb 21	Apr 21	Jul 21	Oct 21	Feb 22	Apr 22	Jul 22	Oct 22	Feb 23
U.S. Adults	119	119	115	116	113	119	116	113	117	114	116	105	99	103	115	118	122	116	115	109	105	107	106

Traveler Sentiment Index™

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

MMGY Travel Intelligence

All Generations Are Experiencing a Decline in Travel Intentions From Last Quarter.



YOY	Feb 2022	Feb 2023
Gen Zers	81%	61%
Millennials	90%	73%
Gen Xers	89%	67%
Boomers	85%	71%

Base: U.S. adults (Gen Zers: n=562; Millennials: n=1,304; Gen Xers: n=1,072; Boomers: n=1,420)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

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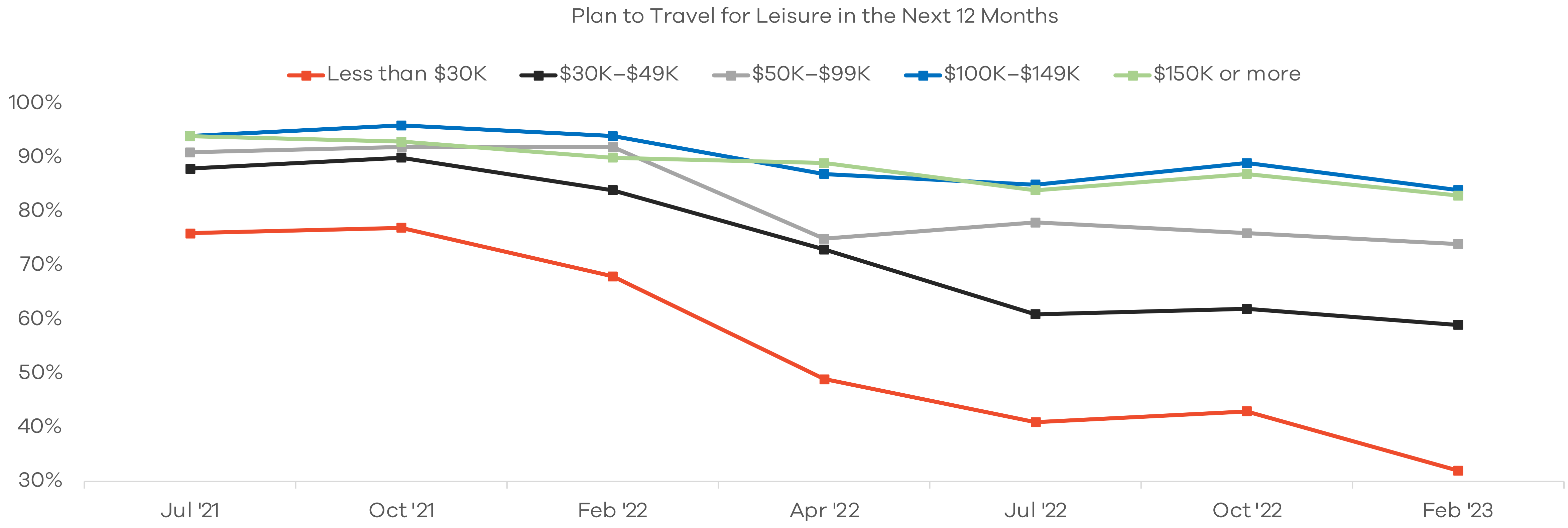
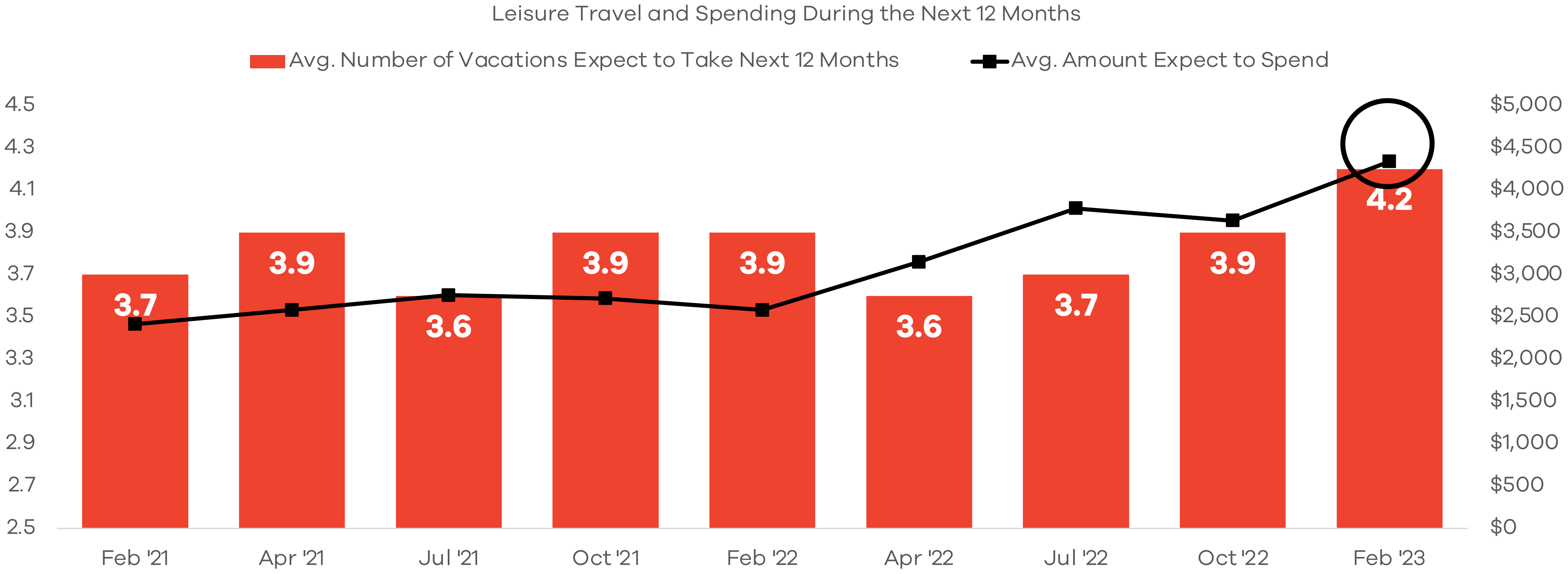
Travel Intentions of Lower-Income Households Display the Largest Decreases From Last Quarter.



Base: U.S. adults (<$30K: n=702; $30K–$49K: n=590; $50K–$99K: n=1,293; $100K–$149K: n= 830; $150K+: n=1,114)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

Among Those Who Do Plan to Travel in the Next 12 Months, Intended Number of Trips and Spending Intentions Have Increased From October 2022.



Base: Active leisure travelers (n=3,146)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

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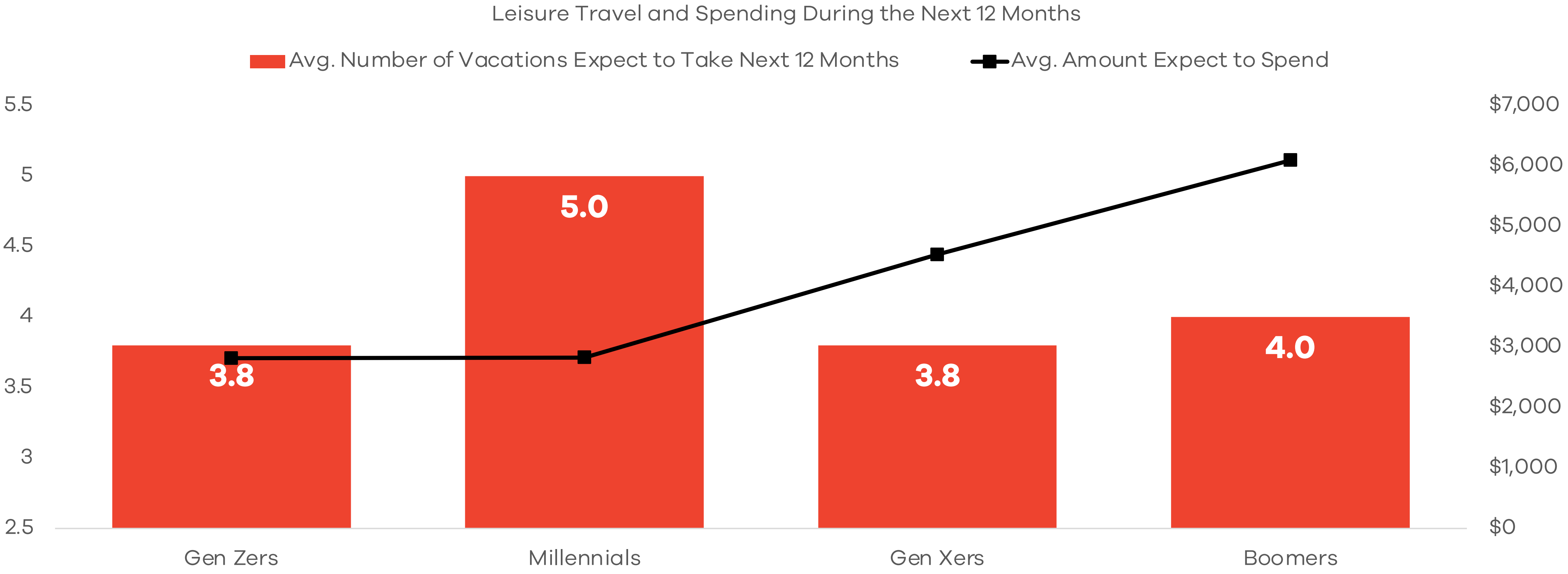
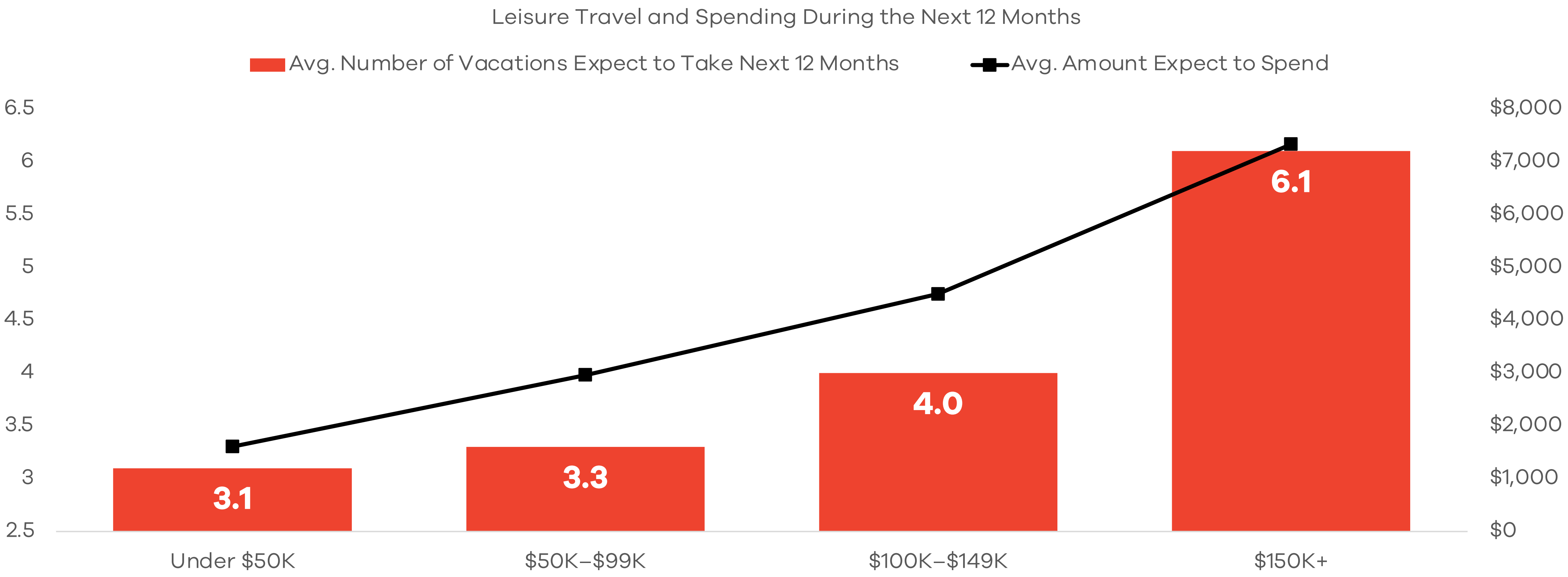
Boomers Expect to Spend the Most on Leisure Travel During the Next 12 Months While Millennials Plan to Take the Most Trips.



Base: Active leisure travelers (Gen Zers: n=344; Millennials: n=957; Gen Xers: n=721; Boomers: n=1,011)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Spring Edition"

MMGY Travel Intelligence

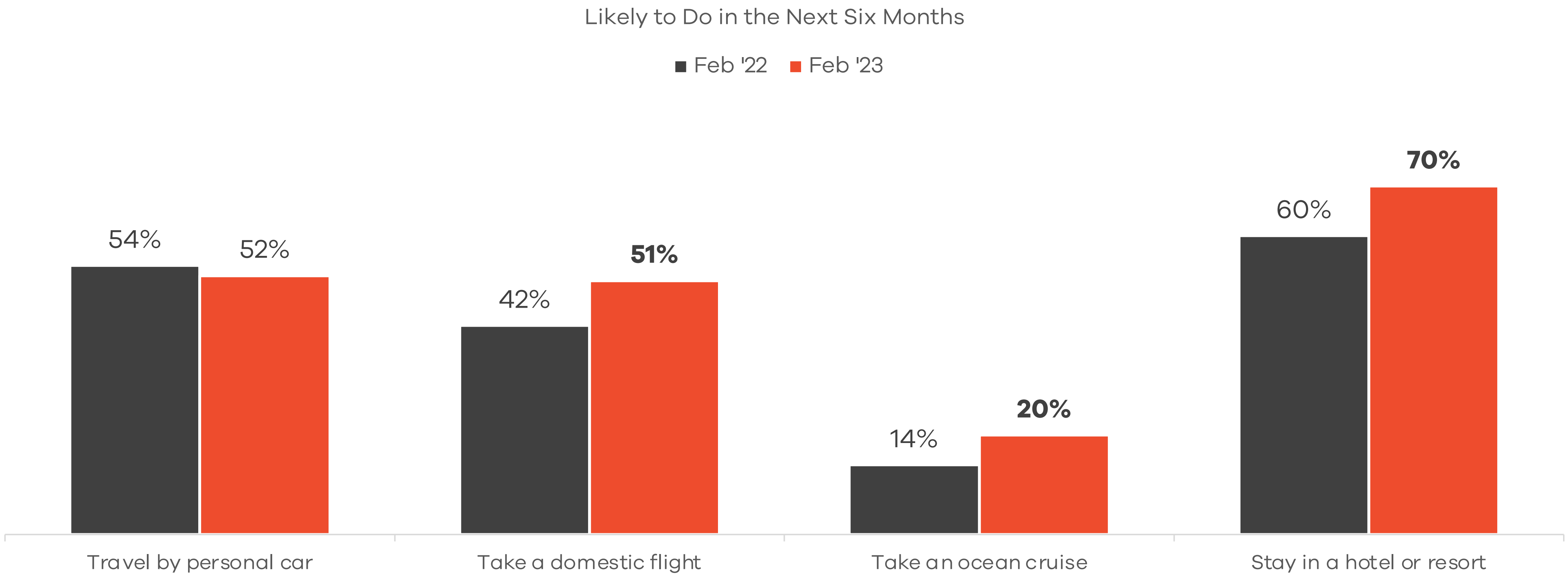
Travel Intentions and Spending Intentions Increase With Household Income.



Base: Active leisure travelers (Under $50K: n=368; $50K–$99K: n=977; $100K–$149K: n=819; $150K+: n=1,043)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

MMGY Travel Intelligence

Likelihood to Take a Flight, Take a Cruise, and Stay in a Hotel or Resort Continue to Increase From Last Year.



Data in bold indicates a statistically significant difference from 2022.
Base: U.S. adults who plan to vacation during the next six months (n=2,744)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Spring Edition"

TRAVEL OUTLOOK SUMMARY

KEY TAKEAWAY:

We're continuing to see a decrease in short-term and overall travel intentions. Seven in 10 (70%) U.S. adults are planning to take a vacation in the next 12 months, down significantly from 86% in February 2022 and down slightly from 73% in October 2022. Similar to previous waves, this decrease is primarily seen among those with lower household incomes. Concerns about personal finances and the high costs of travel continue to play a role in why 4 in 10 U.S. adults are choosing not to travel in the next six months, which remains consistent with last quarter. Meanwhile, these concerns have decreased from last quarter among those who are still planning to travel. About one quarter of active leisure travelers are being impacted by inflationary pressures (29%), the price of gas (27%) and concerns about their personal financial situation (23%) – all down significantly from last quarter (inflationary pressures: 36%; price of gas: 41%; personal financial situation: 28%). Despite a decrease in the percentage of U.S. adults planning to travel in the next 12 months, the intended number of trips (4.2 trips, up from 3.9 in February 2022) and spending intentions ($4,339, up from $2,581 in February 2022) of those still planning to travel continue to increase. These increases in average spending cannot be attributed to any one generation or household income level as all have displayed increases over last year.

WHAT IT MEANS:

Consistent with what we have seen in past waves, we're continuing to see a decrease in travel intentions in both the short- and long-term. The percentage of U.S. adults indicating they do not plan to travel for leisure at all has continued to increase with concerns about inflation and personal finances playing a large role in them choosing not to travel. Despite this decrease in travel intentions, we're seeing these concerns lessen for those who are planning to travel, and we're seeing record average spending intentions and increases in intended number of vacations in the next year among this group. Given that we're seeing this increase in spending across all travelers and not just among one generation or income bracket, it is possible that the increase in U.S. adults planning to opt out of travel has caused this upward shift in average spending intentions due to the makeup and priorities of those still choosing to travel.

Where People Want to Visit

MMGY Travel Intelligence

States Interested in Visiting During the Next Two Years

Rank	Destination	% Interested	
1	Hawaii	65%	▲
2	Florida	63%	▲
3	California	55%	
4	Colorado	50%	
5	New York	49%	
5	Alaska	49%	
7	Texas	46%	▲
7	Nevada	46%	
9	Arizona	44%	
10	Georgia	40%	
11	Tennessee	39%	
12	Washington	38%	
12	South Carolina	38%	
14	North Carolina	37%	
15	Maine	36%	
16	Montana	35%	
16	Massachusetts	35%	
18	Virginia	33%	
19	Louisiana	32%	▼
19	New Mexico	32%	▼

Rank	Destination	% Interested	
21	Oregon	31%	
21	Utah	31%	
21	Pennsylvania	31%	
24	Wyoming	30%	▼
25	Michigan	29%	
25	Vermont	29%	
25	New Jersey	29%	
28	Maryland	26%	▼
28	New Hampshire	26%	▼
30	Connecticut	25%	
30	Rhode Island	25%	▼
30	Wisconsin	25%	▼
30	Illinois	25%	
34	West Virginia	24%	
34	Idaho	24%	▼
34	Kentucky	24%	▼
34	South Dakota	24%	▼
38	Alabama	23%	▼
38	Minnesota	23%	▼
38	Missouri	23%	▼

Rank	Destination	% Interested	
41	Ohio	22%	▼
41	North Dakota	22%	▼
41	Mississippi	22%	▼
44	Delaware	21%	▼
45	Arkansas	20%	▼
45	Kansas	20%	▼
47	Oklahoma	19%	▼
47	Nebraska	19%	▼
47	Indiana	19%	▼
50	Iowa	17%	▼

▲ Displayed a statistically significant increase compared to spring 2022

▼ Displayed a statistically significant decrease compared to spring 2022

Base: Active leisure travelers (n=3,146)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Spring Edition"

Destinations Interested in Visiting During the Next Two Years

Rank	Destination	% Interested
1	Island of Hawai'i	56% ▲
1	Honolulu, HI	56%
3	Las Vegas, NV	54%
4	Maui, HI	53%
5	Kaua'i, HI	52%
5	Florida Keys/Key West, FL	52%
7	Orlando, FL	51%
8	New York City, NY	50%
9	San Diego, CA	46%
10	Tampa/St. Petersburg/ Clearwater, FL	45%
10	Miami, FL	45%
10	Lāna'i, HI	45%
10	Los Angeles, CA	45%
14	New Orleans, LA	44%
14	Palm Beach, FL	44%
14	Nashville, TN	44% ▲
17	San Francisco, CA	43%
18	Washington, D.C.	42%
19	Niagara Falls, NY	41%
19	Fort Lauderdale, FL	41% ▼
21	Denver, CO	40%
21	Napa Valley, CA	40%
21	Phoenix/Scottsdale, AZ	40%

Rank	Destination	% Interested
21	Boston, MA	40% ▲
25	Daytona Beach, FL	39%
25	Panama City Beach, FL	39%
27	Seattle, WA	38%
27	Myrtle Beach, SC	38% ▼
27	Ft. Myers/Sanibel/Captiva, FL	38% ▼
27	St. Augustine, FL	38%
27	San Antonio, TX	38%
32	Palm Springs, CA	37%
32	Charleston, SC	37%
32	Austin, TX	37%
35	Aspen, CO	36%
35	Hilton Head Island, SC	36% ▼
37	Sedona, AZ	35%
37	Dallas, TX	35% ▼
37	Chicago, IL	35%
37	Sonoma County, CA	35%
41	Outer Banks, NC	34% ▼
42	Gatlinburg/Pigeon Forge, TN	33%
42	Atlanta, GA	33% ▼
42	Houston, TX	33%
42	Portland, OR	33%
42	Anaheim, CA	33%

Rank	Destination	% Interested
47	Charlotte, NC	32% ▼
47	Virginia Beach, VA	32%
49	San Jose, CA	31%
49	Asheville, NC	31% ▼
49	Santa Fe, NM	31%
49	Jackson Hole, WY	31%
49	Salt Lake City, UT	31% ▼
49	Vail, CO	31%
55	Philadelphia, PA	30%
56	Raleigh/Durham, NC	28% ▼
56	Park City, UT	28%
58	Corpus Christi, TX	27% ▼
59	Greenville, SC	26%
60	Branson, MO	25% ▼
60	Winston-Salem, NC	25% ▼
62	Wilmington, NC	24% ▼
62	Kansas City, MO	24%
64	St. Louis, MO	23% ▼
64	Ann Arbor, MI	23% ▼
64	Shreveport, LA	23%
64	Detroit, MI	23% ▼
68	Cleveland, OH	22% ▼
68	Minneapolis, MN	22% ▼

Base: Active leisure travelers (n=3,146)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Spring Edition"

MMGY Travel Intelligence

Top 10 Destinations of Interest by Generation

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

Gen Zers	
1	Island of Hawai'i
2	Miami, FL
3	New York City, NY
4	Los Angeles, CA
5	Orlando, FL
5	Niagara Falls, NY
7	Honolulu, HI
7	Las Vegas, NV
7	Dallas, TX
10	Kaua'i, HI
10	Chicago, IL

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

Gen Xers	
1	Island of Hawai'i
2	Honolulu, HI
2	Maui, HI
4	Las Vegas, NV
4	Orlando, FL
6	Kaua'i, HI
6	Florida Keys/Key West, FL
8	New York City, NY
9	Lāna'i, HI
10	Miami, FL

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

Base: Active leisure travelers (Gen Zers: n=344; Millennials: n=957; Gen Xers: n=721; Boomers: n=1,011)

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

Spring Module

Sustainability in Travel

MMGY Travel Intelligence

Compared to 2022, a Smaller Proportion of Travelers Consider a Provider's Environmental Efforts When Making Travel Decisions.

20% 2022 **14%** 2023

of active leisure travelers indicate a travel service provider's focus on sustainability and environmental considerations **greatly** impacts their travel decision-making.

Gen Zers: **18%**
Millennials: **29%**
Gen Xers: 10%
Boomers: 2%

Have Kids: **28%**
Don't Have Kids: 8%

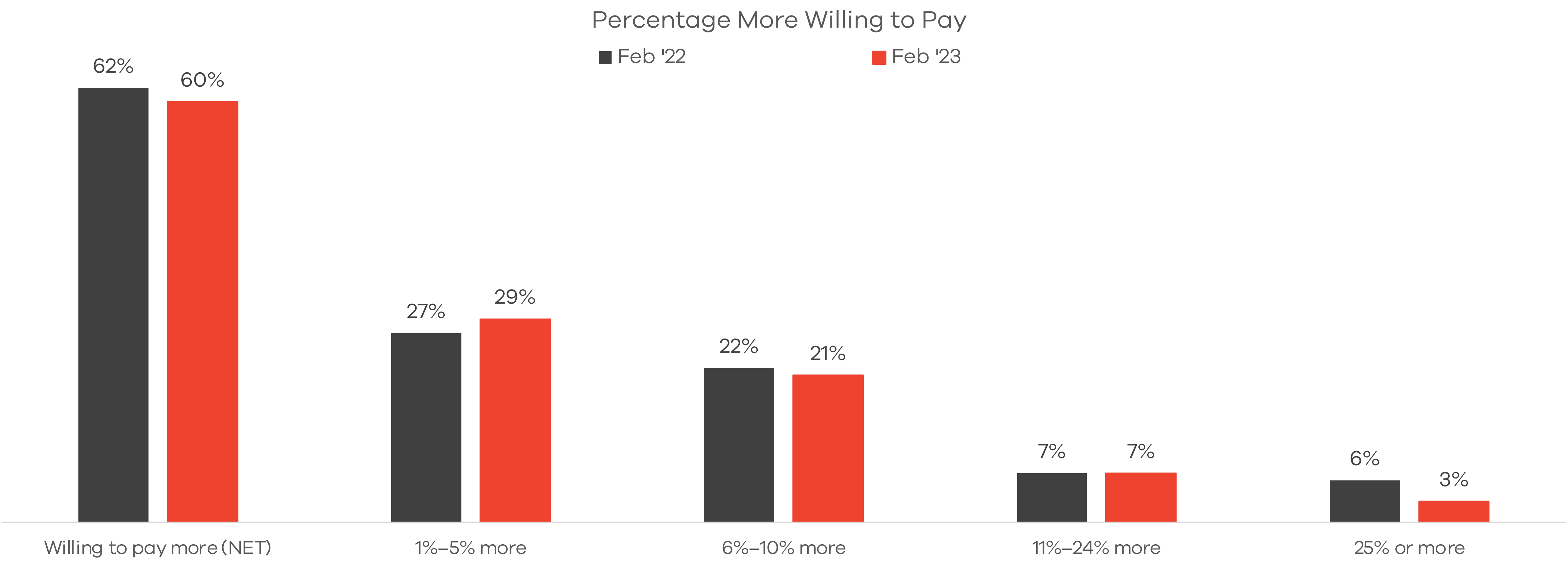
Less than $100K: 11%
More than $100K: **17%**

/ Significantly more Gen Zers, Millennials, those with children and those with higher incomes indicate environmental efforts greatly impact their decisions.

Base: Active leisure travelers (n=3,146)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Spring Edition"

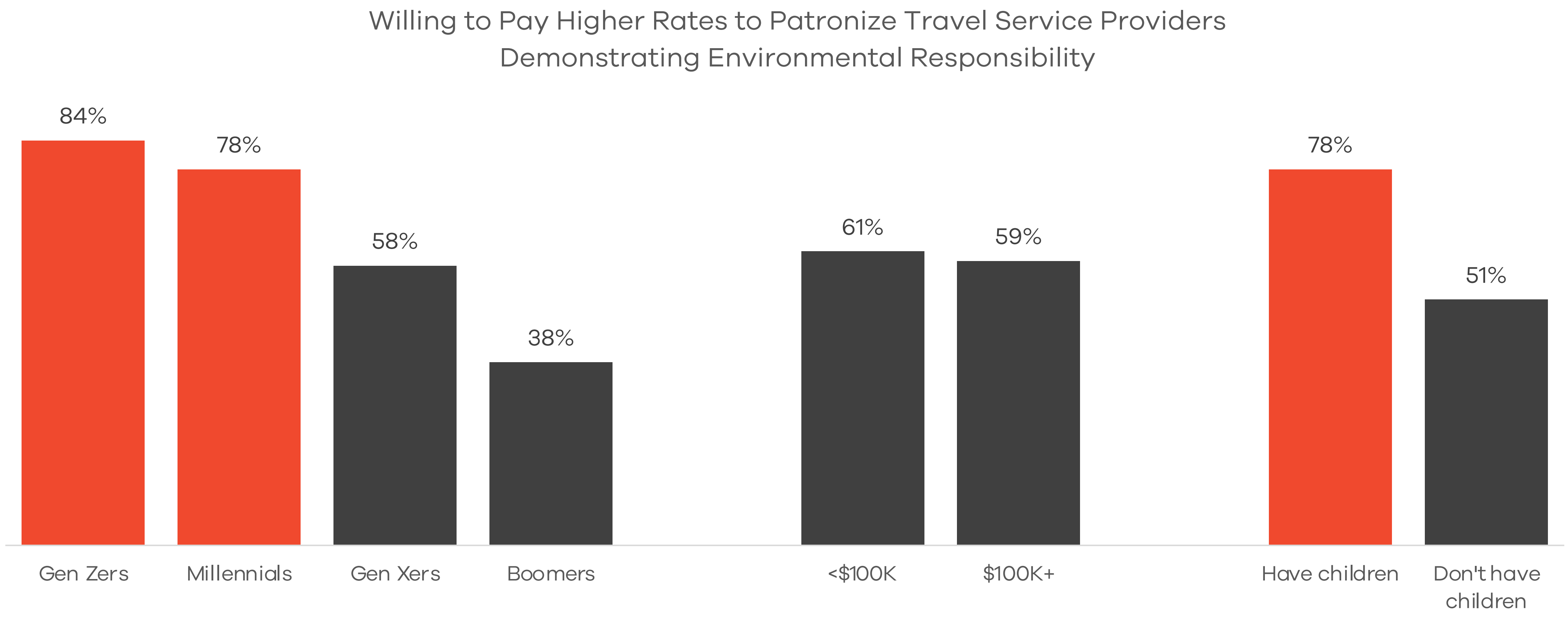
MMGY Travel Intelligence

Six in 10 Travelers Are Willing to Pay More to Patronize Travel Providers Who Demonstrate Environmental Responsibility.



Base: Active leisure travelers (n=3,146)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

Younger Generations and Those With Children Are the Groups Most Willing to Pay More.



Base: Active leisure travelers (n=3,146)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

A Majority of Travelers Indicate They Are Willing to Change Travel Behavior to Reduce Their Environmental Impact.

81% 2022

81% 2023

of active leisure travelers are willing to change travel behavior to reduce their impact on the environment.

Gen Zers: **93%**
Millennials: **90%**
Gen Xers: 79%
Boomers: 71%

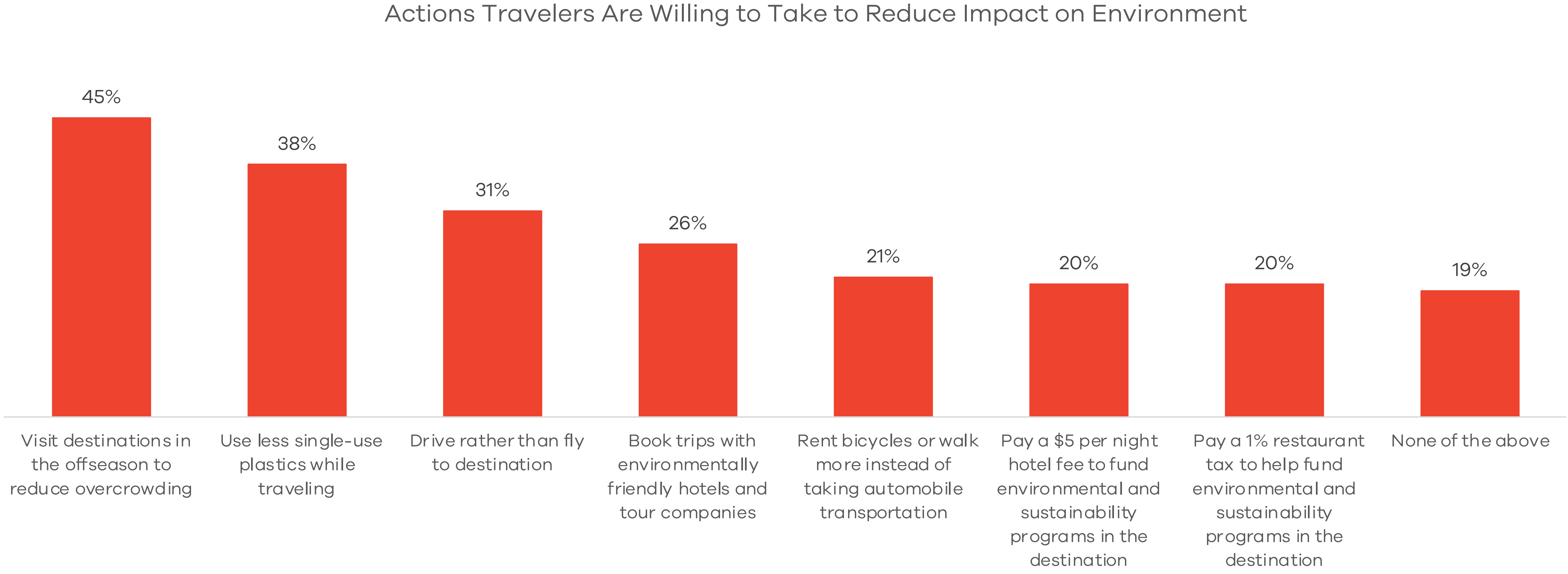
Have Kids: **89%**
Don't Have Kids: 77%

Less than $100K: 81%
More than $100K: 81%

/ Significantly more Gen Zers, Millennials and those with children are willing to change behavior.

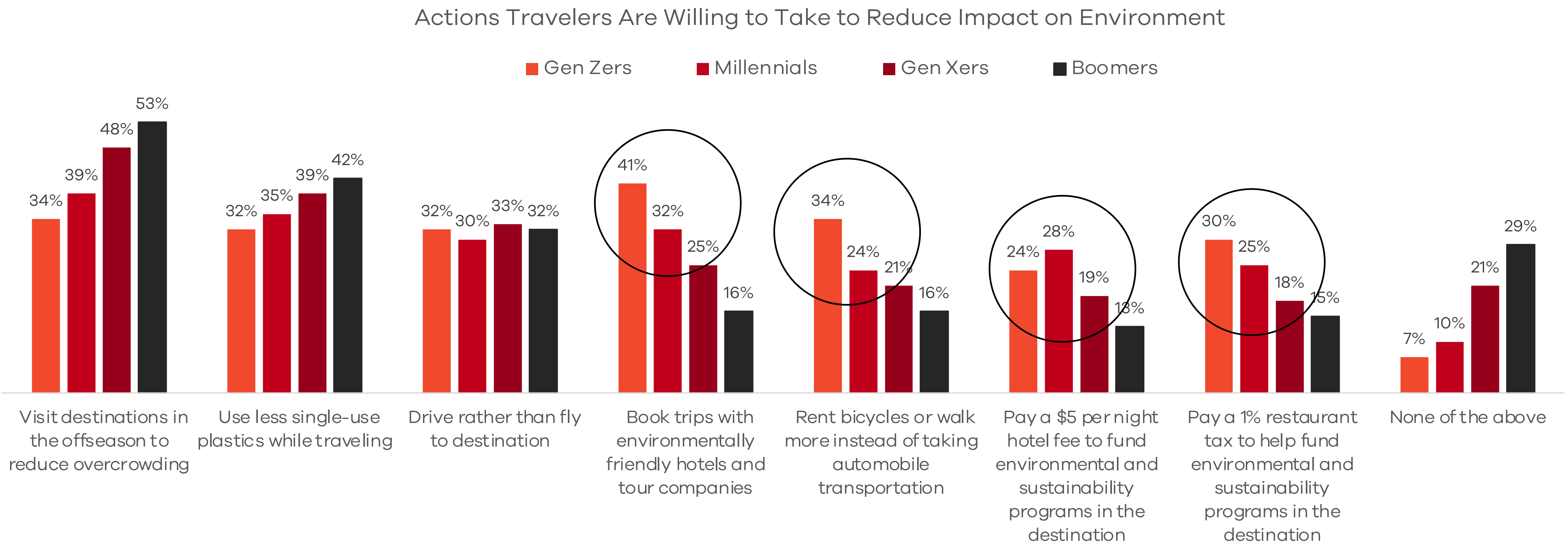
Base: Active leisure travelers (n=3,146)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

Travelers Are More Willing to Change Behavior Than Pay a Visible Premium.



Base: Active leisure travelers (n=3,146)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Spring Edition"

Younger Travelers Are More Willing to Pay Fees That Will Help Fund Sustainability Programs.



Base: Active leisure travelers (Gen Zers: n=272; Millennials: n=1,494; Gen Xers: n=866; Boomers: n=1,198)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Spring Edition"

MMGY Travel Intelligence

Compared to 2022, a Smaller Percentage of Travelers Agree That Climate Change Will Impact Their Choice of Travel Destinations in the Future.

48% 2022

40% 2023

of active leisure travelers agree that climate change will influence which destinations they want to visit in the next 5–10 years.

Gen Zers: 39%
Millennials: **53%**
Gen Xers: 39%
Boomers: 29%

Have Kids: **52%**
Don't Have Kids: 34%

Less than $100K: 34%
More than $100K: **45%**

/ Significantly more Millennials, those with children and those with higher incomes agree that climate change will impact their travel destination choices in the future.

Base: Active leisure travelers (n=3,146)

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

Compared to 2022, Fewer Travelers Are Being Influenced by Tourism Overcrowding.

60% 2022 **55%** 2023

of active leisure travelers agree that tourism overcrowding will influence which destinations they will visit in the next 5–10 years.

Gen Zers: 49%
Millennials: **57%**
Gen Xers: **57%**
Boomers: 52%

Have Kids: **60%**
Don't Have Kids: 53%

Less than $100K: 51%
More than $100K: **59%**

/ Significantly more Millennials, Gen Xers, those with children and those with higher incomes agree that tourism overcrowding will influence their travel destination choices in the next 5–10 years.

Base: Active leisure travelers (n=3,146)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Spring Edition"

MMGY Travel Intelligence

Millennials and Those With Children Want to See How Travel Companies Are Becoming More Sustainable.

35% 2023

of active leisure travelers believe it is important for travel companies to provide an inside look at how they are becoming more sustainable.

Gen Zers: 39%
Millennials: **57%**
Gen Xers: 33%
Boomers: 16%

Have Kids: **55%**
Don't Have Kids: 25%

Less than $100K: 31%
More than $100K: **38%**

/ Significantly more Millennials, those with children and those with higher incomes believe it is important for travel companies to provide an inside look at how they're becoming more sustainable.

Base: Active leisure travelers (n=3,146)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

The Environmentally Conscious Traveler

21%

of Active Leisure Travelers

4.0

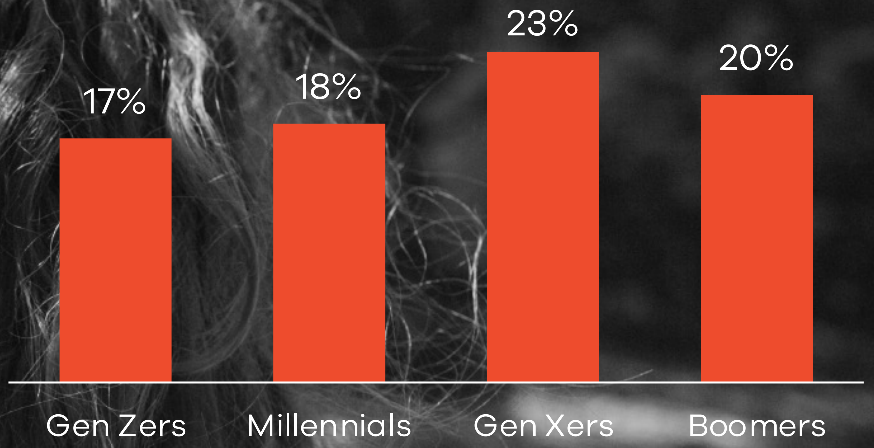
Expected Leisure Trips During Next 12 Months

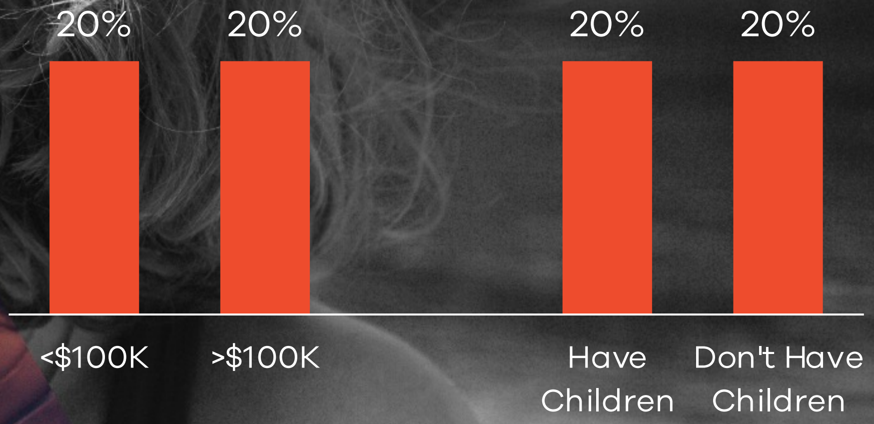
$4,956

Expected Spend During Next 12 Months

Top Travel Motivators:

- To get away and unplug (76%)
- Explore nature/outdoors (76%)
- Spend time with spouse/children (75%)





SUSTAINABILITY IN TRAVEL SUMMARY

KEY TAKEAWAY:

Compared to last year, fewer active leisure travelers indicate that they are greatly impacted by a travel service provider's focus on sustainability when making travel decisions, down from 20% in 2022 to 14% in 2023. More say that climate change and overcrowding will not influence their destination choices in the next 5–10 years. Despite this, we're seeing a similar percentage of travelers as last year who are willing to change their travel habits and pay more for sustainable travel. Six in 10 (60%) active leisure travelers are willing to pay more to patronize travel service providers demonstrating environmental responsibility, relatively unchanged from 62% last year. Consistent with last year, 8 in 10 (81%) are willing to change their own travel behaviors to reduce their environmental impact. This focus on sustainability continues to be especially true for younger generations and those with children. About 8 in 10 Gen Zers (84%), Millennials (78%) and parents (78%) are willing to pay more to patronize environmentally responsible service providers, and about 9 in 10 Gen Zers (93%), Millennials (90%) and parents (89%) are willing to change their travel behavior to reduce their environmental impact. Younger generations specifically are more willing than older generations to make monetary commitments to help fund sustainability programs, while older generations are willing to change travel behaviors that don't have an added cost component, such as visiting in the off-season or using less single-use plastics while traveling.

SUSTAINABILITY IN TRAVEL SUMMARY

KEY TAKEAWAY (cont.):

It is important for travel companies to provide transparency to travelers when making decisions related to sustainability. About one-third (35%) of travelers believe it is important for travel companies to provide an inside look at how they are becoming more sustainable, with 57% of Millennials and 55% of those with children indicating so.

WHAT IT MEANS:

It is clear that sustainability considerations are not diminishing anytime soon and will continue to be a priority for many travelers, especially younger travelers. Despite a decrease in its impact on travel decisions, travelers are still wanting and willing to do their part to travel more sustainably. This may be in part due to the sustainable actions many companies have taken already that have caused fewer travelers to use this as a primary factor in their travel decisions. Many travelers are looking for transparency from travel companies when it comes to sustainability, so it will be important to give travelers an inside look into any sustainability efforts being made.

Spring Module

Sources of Travel Information

MMGY Travel Intelligence

Travelers Are Turning to More Websites for Travel Information Than Last Year With Many Displaying Increases in Regular Usage.

Websites Used Regularly for Travel Information	Feb '22	Feb '23
Google	33%	35%
Tripadvisor	21%	**28%** ▲
Expedia	24%	**27%** ▲
Specific hotel brand website	21%	**26%** ▲
Specific airline brand website	19%	**23%** ▲
YouTube	22%	22%
Hotels.com	17%	**22%** ▲
Booking.com	18%	**21%** ▲
AAA Travel	15%	15%
Travelocity	14%	15%
Trivago	14%	14%
Priceline	14%	14%
Specific cruise brand website	11%	**14%** ▲
Specific vacation destination website	13%	13%
Kayak	12%	12%
Orbitz	9%	9%
Yelp	8%	9%
Travel blogs	7%	6%

Data in bold indicates a significant difference from February 2022.

Base: Active leisure travelers (n=3,146)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Spring Edition"

Websites Used Vary by Age and Income.

Top three websites for each generation/income category are shaded in black.

Websites Used Regularly for Travel Information	Gen Zers	Millennials	Gen Xers	Boomers	HHI <$100K	HHI >$100K
Google	46%	43%	34%	26%	37%	33%
Tripadvisor	23%	27%	33%	29%	25%	31%
Expedia	22%	34%	30%	21%	28%	26%
Specific hotel brand website	20%	16%	27%	37%	20%	31%
Specific airline brand website	14%	17%	22%	32%	18%	28%
YouTube	32%	31%	27%	8%	23%	21%
Hotels.com	32%	27%	23%	14%	25%	19%
Booking.com	31%	27%	24%	13%	25%	17%
AAA Travel	10%	13%	14%	19%	12%	17%
Travelocity	12%	19%	15%	12%	14%	16%
Trivago	30%	17%	12%	9%	16%	13%
Priceline	13%	19%	13%	11%	15%	13%
Specific cruise brand website	13%	11%	11%	18%	10%	17%
Specific vacation destination website	16%	11%	11%	15%	12%	14%
Kayak	11%	14%	15%	9%	11%	13%
Orbitz	5%	12%	9%	8%	9%	9%
Yelp	20%	13%	6%	4%	9%	9%
Travel blogs	9%	10%	5%	2%	5%	7%

/ YouTube is more likely to be visited by a younger audience.

/ Tripadvisor and specific travel service provider (i.e., Brand.com) websites are more likely to be visited by an older audience.

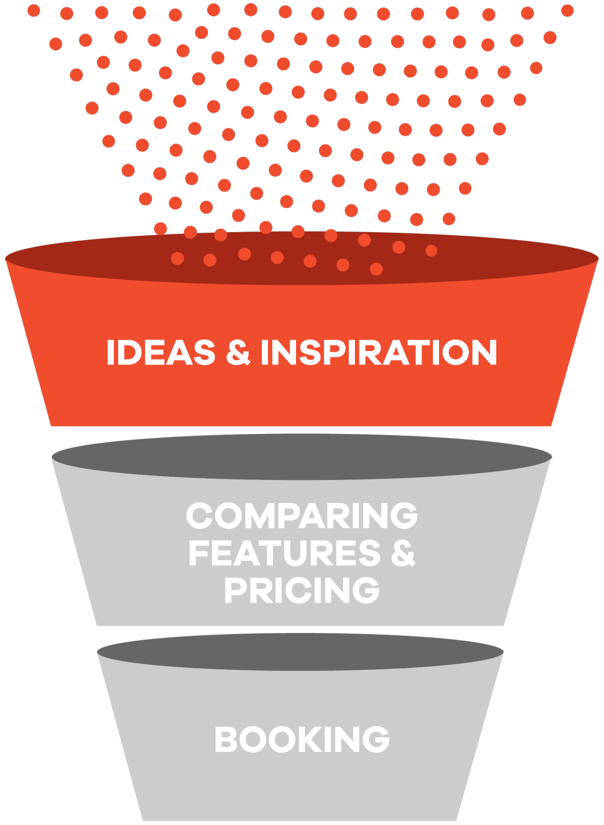
/ Those with household incomes less than $100K are more likely to turn to OTAs such as Expedia, Hotels.com and Booking.com.

Base: Active leisure travelers (Gen Zers: n=344; Millennials: n=957; Gen Xers: n=721; Boomers: n=1,011) (HHI<$100K: n=1,525; HHI>$100K: n=1,621)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Spring Edition"

Travelers Report Using More Sources for Ideas and Inspiration in 2023 Than in 2022.

Sources Considered for Ideas and Inspiration	Feb '22	Feb '23
Average number of sources (1+)	4.7	4.9 ▲
Friends and family	47%	**50%** ▲
Travel review websites	24%	**34%** ▲
Online visitor guides	23%	**29%** ▲
Destination websites	23%	**27%** ▲
Television shows	22%	24%
Travel service provider websites (Hilton, Delta, etc.)	18%	**23%** ▲
Television advertising	20%	20%
Online travel agencies	19%	20%
Printed visitor guides	18%	**20%** ▲
Magazine/newspaper articles	17%	**20%** ▲
Streaming TV services (Netflix, Hulu, etc.)	18%	19%
Video sharing websites (YouTube, etc.)	17%	**19%** ▲
Online/social media advertising	16%	16%
Social media posts from destinations or travel service providers	15%	16%
Email from the destination	13%	**15%** ▲
Direct mail	12%	**14%** ▲
Magazine/newspaper advertisements	16%	**13%** ▼
Social media influencers	12%	13%
Traditional travel agents	10%	**12%** ▲
Email from the travel service provider	11%	11%
Content from publishers (Buzzfeed, The New York Times, etc.)	8%	**10%** ▲
Digital newspaper/magazine	8%	9%
Streaming audio (Pandora, Spotify, etc.)	7%	8%
Podcasts	8%	7%
Radio shows/advertising	7%	7%
Billboards	7%	7%

Data in bold indicates a significant difference from February 2022.



TRAVEL PLANNING FUNNEL

Base: Active leisure travelers (n=3,146)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

MMGY Travel Intelligence

Sources Considered for Ideas and Inspiration

Top five sources for each generation are shaded in black.

Sources Considered for Ideas and Inspiration	Gen Zers	Millennials	Gen Xers	Boomers
Friends and family	42%	37%	55%	61%
Travel review websites	22%	26%	44%	38%
Online visitor guides	21%	21%	36%	36%
Destination websites	18%	17%	30%	38%
Television shows	27%	23%	27%	22%
Travel service provider websites (Hilton, Delta, etc.)	16%	21%	24%	27%
Television advertising	17%	18%	22%	23%
Online travel agencies	11%	20%	27%	19%
Printed visitor guides	16%	11%	19%	32%
Magazine/newspaper articles	11%	14%	19%	27%
Streaming TV services (Netflix, Hulu, etc.)	35%	23%	21%	10%
Video sharing websites (YouTube, etc.)	31%	27%	20%	9%
Online/social media advertising	26%	23%	17%	7%
Social media posts from destinations or travel service providers	23%	24%	15%	6%
Email from the destination	11%	11%	16%	17%
Direct mail	12%	13%	12%	17%
Magazine/newspaper advertisements	11%	9%	14%	16%
Social media influencers	29%	22%	10%	3%
Traditional travel agents	12%	10%	12%	13%
Email from the travel service provider	9%	10%	12%	11%
Content from publishers (Buzzfeed, The New York Times, etc.)	14%	15%	8%	4%
Digital newspaper/magazine	7%	13%	9%	7%
Streaming audio (Pandora, Spotify, etc.)	20%	14%	5%	1%
Podcasts	12%	14%	5%	2%
Radio shows/advertising	14%	9%	6%	4%
Billboards	11%	12%	5%	4%

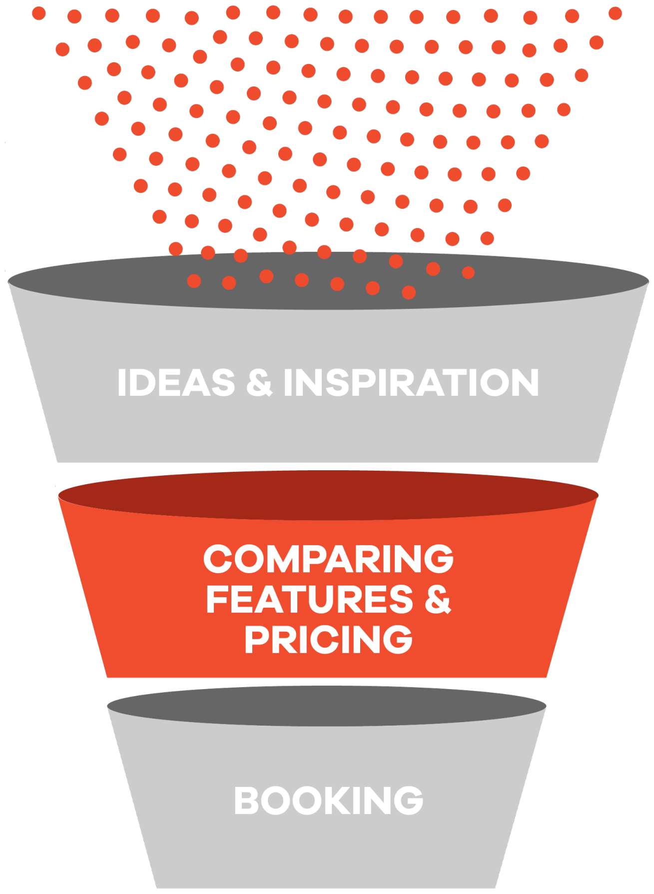
- The advice of friends and family is the top source for travel ideas and inspiration across all generations.
- Advertising on streaming TV services, video sharing websites and social media will be more effective with younger travelers.
- Boomer travelers still value printed visitor guides for travel inspiration.

Base: Active leisure travelers (Gen Zers: n=344; Millennials: n=957; Gen Xers: n=721; Boomers: n=1,011)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

The Use of Travel Review Websites, OTAs and Service Provider Websites for Comparing Features and Pricing Has Increased From Last Year.

Sources Considered for Comparing Features and Pricing	Feb '22	Feb '23
Average number of sources (1+)	4.1	4.3 ▲
Friends and family	33%	**37%** ▲
Travel review websites	24%	**31%** ▲
Online travel agencies	23%	**28%** ▲
Travel service provider websites (Hilton, Delta, etc.)	21%	**28%** ▲
Online visitor guides	20%	22%
Destination websites	21%	22%
Printed visitor guides	16%	15%
Video sharing websites (YouTube, etc.)	14%	15%
Email from the destination	12%	13%
Television advertising	13%	12%
Traditional travel agents	10%	**12%** ▲
Direct mail	10%	**12%** ▲
Television shows	12%	11%
Streaming TV services (Netflix, Hulu, etc.)	12%	11%
Magazine/newspaper articles	12%	11%
Email from the travel service provider	11%	11%
Online/social media advertising	11%	10%
Social media posts from destinations or travel service providers	11%	10%
Magazine/newspaper advertisements	10%	9%
Social media influencers	9%	9%
Content from publishers (Buzzfeed, The New York Times, etc.)	9%	8%
Streaming audio (Pandora, Spotify, etc.)	6%	6%
Digital newspaper/magazine	6%	6%
Podcasts	6%	6%
Billboards	5%	5%
Radio shows/advertising	5%	5%

Data in bold indicates a significant difference from February 2022.



TRAVEL PLANNING FUNNEL

Base: Active leisure travelers (n=3,146)

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

MMGY Travel Intelligence

Sources Considered When Comparing Features and Pricing

Top five sources for each generation are shaded in black.

Sources Considered When Comparing Features and Pricing	Gen Zers	Millennials	Gen Xers	Boomers
Friends and family	36%	28%	42%	43%
Travel review websites	20%	22%	40%	39%
Online travel agencies	21%	26%	33%	28%
Travel service provider websites (Hilton, Delta, etc.)	20%	19%	32%	36%
Online visitor guides	21%	18%	20%	28%
Destination websites	21%	15%	25%	28%
Printed visitor guides	5%	11%	13%	24%
Video sharing websites (YouTube, etc.)	25%	21%	16%	6%
Email from the destination	12%	12%	13%	16%
Television advertising	11%	13%	17%	10%
Traditional travel agents	8%	13%	11%	14%
Direct mail	9%	9%	10%	15%
Television shows	10%	13%	12%	10%
Streaming TV services (Netflix, Hulu, etc.)	17%	18%	11%	4%
Magazine/newspaper articles	8%	10%	9%	13%
Email from the travel service provider	7%	8%	13%	12%
Online/social media advertising	18%	16%	9%	3%
Social media posts from destinations or travel service providers	15%	15%	8%	4%
Magazine/newspaper advertisements	7%	8%	8%	10%
Social media influencers	20%	15%	6%	1%
Content from publishers (Buzzfeed, The New York Times, etc.)	17%	12%	4%	3%
Streaming audio (Pandora, Spotify, etc.)	12%	11%	4%	0%
Digital newspaper/magazine	9%	7%	7%	5%
Podcasts	8%	11%	5%	1%
Billboards	8%	11%	2%	1%
Radio shows/advertising	9%	7%	3%	2%

/ Boomers are more likely to use online visitor guides than younger generations.

/ Video sharing websites are more likely to reach a younger demographic.

Base: Active leisure travelers (Gen Zers: n=344; Millennials: n=957; Gen Xers: n=721; Boomers: n=1,011)

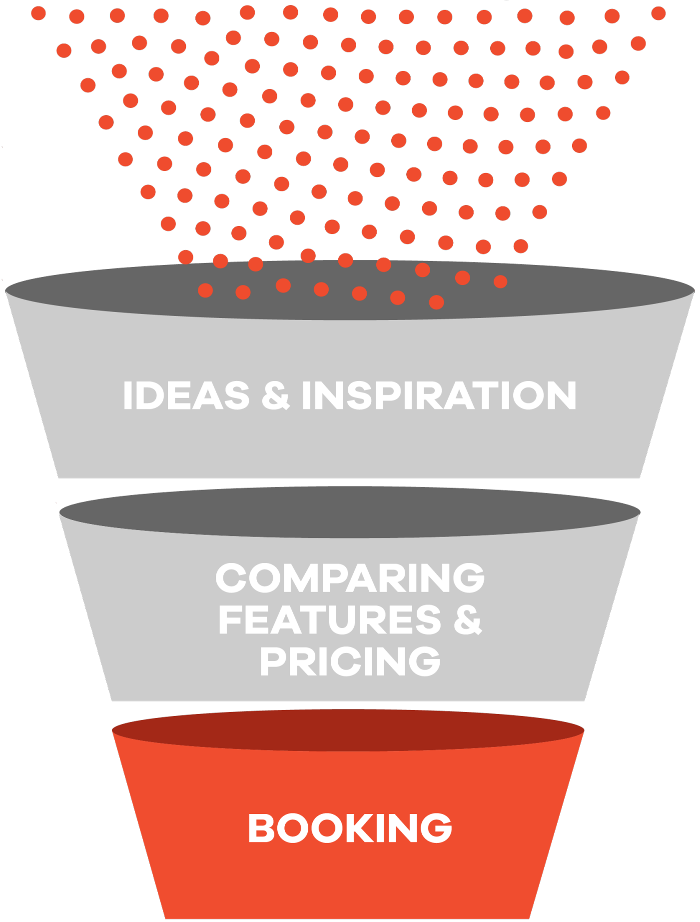
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Spring Edition"

MMGY Travel Intelligence

More Travelers Are Using Travel Provider Websites to Make Reservations Than Did So Last Year, Making It the Top Choice Among Travelers.

Sources Used When Making Reservations	Feb '22	Feb '23
Travel service provider websites	38%	**44%** ▲
Online travel agencies	39%	39%
Calling travel service provider directly	26%	**22%** ▼
Google Travel (Google Flights/Hotels)	24%	22%
Destination websites	24%	**19%** ▼
Travel review websites	21%	**18%** ▼
Traditional travel agents	21%	**18%** ▼
Travel service provider app	17%	16%

Data in bold indicates a significant difference from February 2022.



TRAVEL PLANNING FUNNEL

Base: Active leisure travelers (n=3,146)

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

MMGY Travel Intelligence

Millennials Are Most Likely to Book With OTAs and Boomers Are Most Likely to Book With Brand.com Sites, While Gen Zers and Gen Xers Displayed No Preference.

Top two sources for each generation are shaded in black.

Sources Considered for Making Reservations	Gen Zers	Millennials	Gen Xers	Boomers
Travel service provider websites (Hilton, Delta, etc.)	31%	39%	44%	54%
Online travel agencies (Expedia, Orbitz, etc.)	31%	46%	45%	33%
Calling travel service provider directly	25%	19%	19%	24%
Google Travel (Google Flights/Hotels)	28%	36%	20%	9%
Destination websites	31%	26%	21%	9%
Travel review websites	25%	23%	21%	12%
Traditional travel agents	20%	20%	14%	17%
Travel service provider app	19%	24%	13%	9%

/ Compared to 2022, significantly more Millennials and Boomers are using travel service provider websites when making travel reservations (Millennials: up from 31% to 39%; Boomers: up from 45% to 54%).

Base: Active leisure travelers (Gen Zers: n=344; Millennials: n=957; Gen Xers: n=721; Boomers: n=1,011)

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

MMGY Travel Intelligence

Sources Used Vary by More Than Just Demographics

Sources Considered for Ideas and Inspiration	All Active Travelers	Luxury Travelers	Travel Bargain Hunters
Friends and family	50%	53%	58%
Travel review websites	34%	45%	47%
Online visitor guides	29%	39%	38%
Destination websites	27%	35%	37%
Television shows	24%	29%	28%
Travel service provider websites (Hilton, Delta, etc.)	23%	36%	35%
Television advertising	20%	25%	27%
Online travel agencies	20%	33%	29%
Printed visitor guides	20%	24%	28%
Magazine/newspaper articles	20%	29%	26%
Streaming TV services (Netflix, Hulu, etc.)	19%	**25%**	17%
Video sharing websites (YouTube, etc.)	19%	26%	22%
Online/social media advertising	16%	19%	18%
Social media posts from destinations or travel service providers	16%	**27%**	20%
Email from the destination	15%	21%	20%
Direct mail	14%	19%	18%
Magazine/newspaper advertisements	13%	20%	18%
Social media influencers	13%	**23%**	13%
Traditional travel agents	12%	**22%**	15%
Email from the travel service provider	11%	17%	17%
Content from publishers (Buzzfeed, The New York Times, etc.)	10%	**18%**	11%
Digital newspaper/magazine	9%	**19%**	11%
Streaming audio (Pandora, Spotify, etc.)	8%	**13%**	9%
Podcasts	7%	**13%**	8%
Radio shows/advertising	7%	11%	8%
Billboards	7%	**14%**	7%

Data in bold indicates a significant difference from travel bargain hunters.

/ Luxury travelers are more likely to use streaming TV services, social media, traditional travel agents, digital newspapers/magazines and content from publishers for travel ideas and inspiration.

Base: Active leisure travelers (luxury travelers: n=546; travel bargain hunters: n=938)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

Compared to One Year Ago, Fewer Travelers Trust Online Reviews Over the Advice of Friends and Family.

44% 2022 **36%** 2023

of active leisure travelers indicate they trust online reviews over the opinions of their friends and family.

Gen Zers: 31%
Millennials: **50%**
Gen Xers: 41%
Boomers: 22%

Have Kids: **52%**
Don't Have Kids: 29%

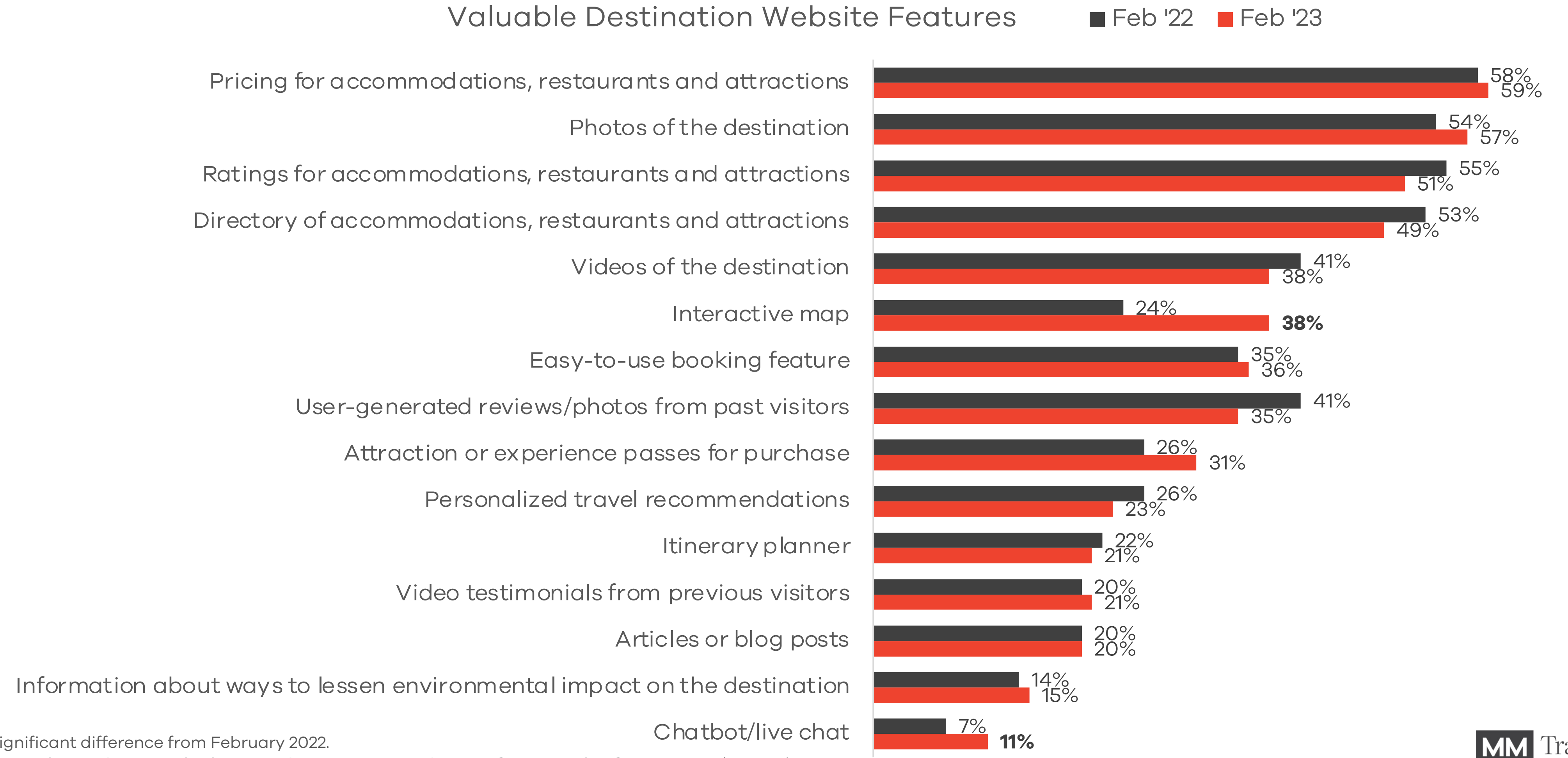
Less than $100K: 33%
More than $100K: **39%**

/ Millennials, travelers with higher incomes and travelers with kids are less trusting of friends and family compared to online reviews.

Base: Active leisure travelers (n=3,146)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Spring Edition"

MMGY Travel Intelligence

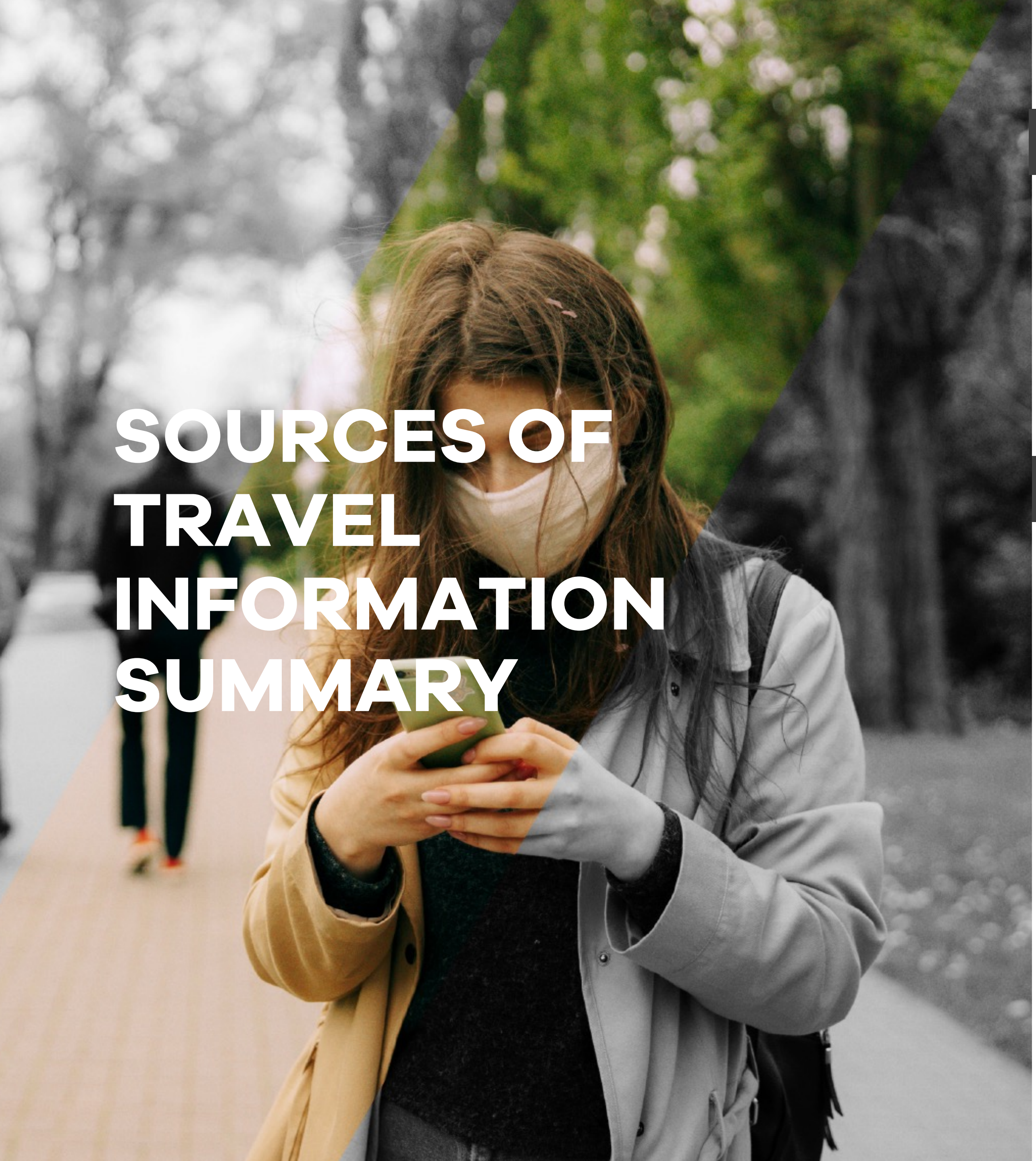
Active Travelers Most Value Accommodation, Restaurant and Attraction Information as well as Photos of the Destination on a Destination Website.



Data in bold indicates a significant difference from February 2022.

Base: Active leisure travelers who regularly visit destination websites for travel information (n=414)

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



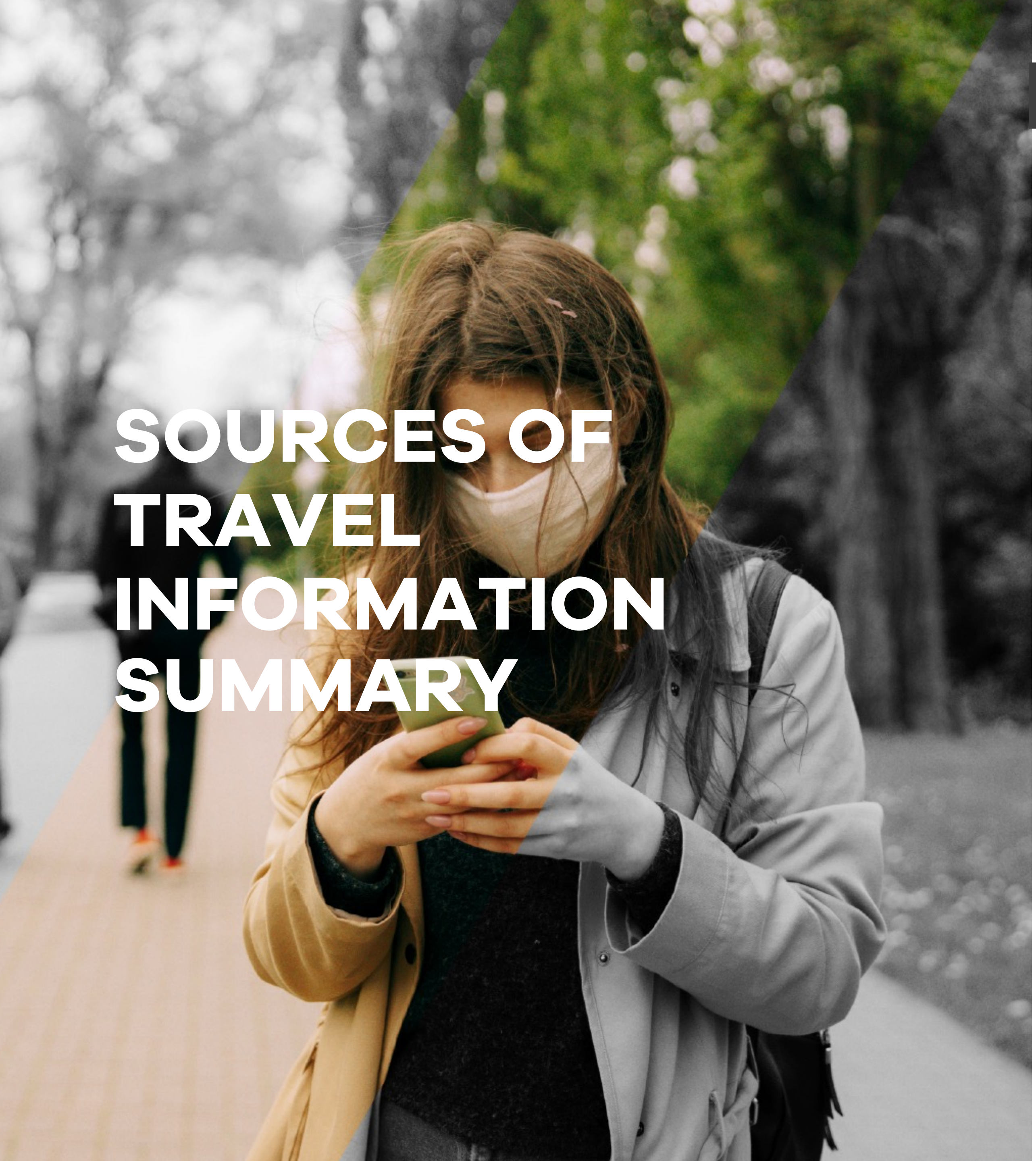
SOURCES OF TRAVEL INFORMATION SUMMARY

KEY TAKEAWAY:

Travelers report seeking out more sources for ideas and inspiration in 2023 than in 2022 with many sources displaying increases in usage including travel review websites, online visitor guides, destination websites and travel service provider websites.

WHAT IT MEANS:

After seeing a decrease in the number of sources used last year, it would appear that travelers are opening themselves up to more channels of travel inspiration. We hypothesized last year that the decrease may have been due to travelers knowing which destinations they were interested in visiting or that they felt more knowledgeable and confident in the sources they regularly used. It is possible that now travelers are broadening their destination interests and are open to exploring new destinations more so than they were immediately after the pandemic.



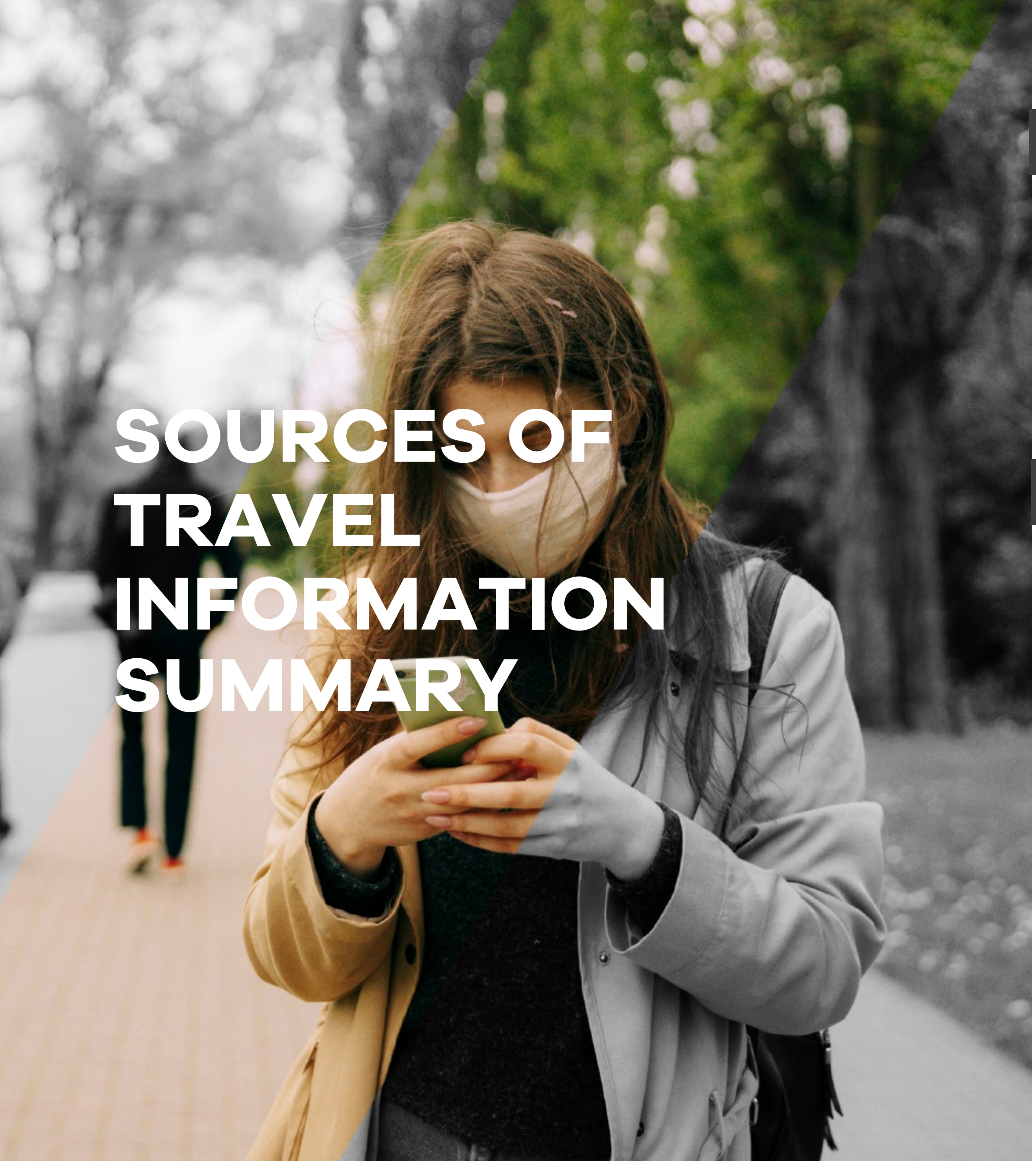
SOURCES OF TRAVEL INFORMATION SUMMARY

KEY TAKEAWAY:

Streaming TV services, video sharing sites and social media are the top sources to reach a younger audience. When reviewing the top sources used for ideas and inspiration among each generation, 35% of Gen Zers are turning to streaming TV services followed by video sharing websites (31%) and social media influencers (29%), while Millennials are turning to video sharing websites (27%), social media posts from destinations and travel service providers (24%), streaming TV services (23%) and online/social media advertising (23%). Younger generations are using these top sources for ideas and inspiration more frequently than older generations.

WHAT IT MEANS:

With younger generations entering the travel space, it is necessary to continue shifting advertising priorities to reach these audiences where they are consuming travel content. While older generations are still consuming travel content through traditional means like travel review websites, online visitor guides and destination websites, some of the top sources for travel ideas and inspiration for Gen Zers and Millennials are streaming TV services, video sharing websites and social media. These channels need to be top priorities for any destination or travel service provider looking to target and attract travelers from these generations.



SOURCES OF TRAVEL INFORMATION SUMMARY

KEY TAKEAWAY:

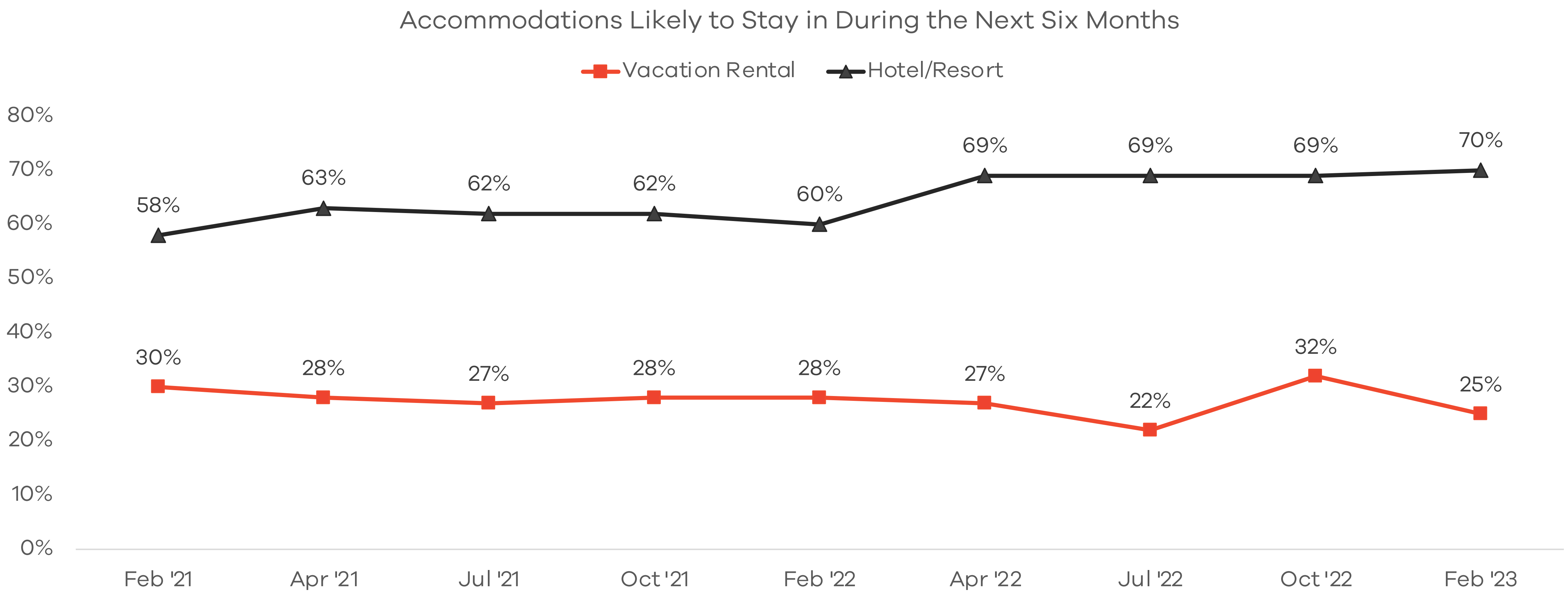
Compared to one year ago, more travelers are using travel service provider websites to make travel reservations. Millennials and Boomers are primarily driving this increase despite Millennials displaying a slight preference for booking with OTAs.

WHAT IT MEANS:

Last year we saw a decrease in OTA usage for making reservations compared to 2021, and now we're seeing this tip in favor of Brand.com for reservations. With cancellation policies becoming a major topic during the pandemic, this may have caused a shift toward more travelers opting to book directly with the travel service provider rather than risk not being able to cancel or re-book if done through an OTA. It will be important to see how this metric may shift in the future if inflation rates continue to rise and the cost savings of booking with an OTA once again outweighs the security of booking directly.

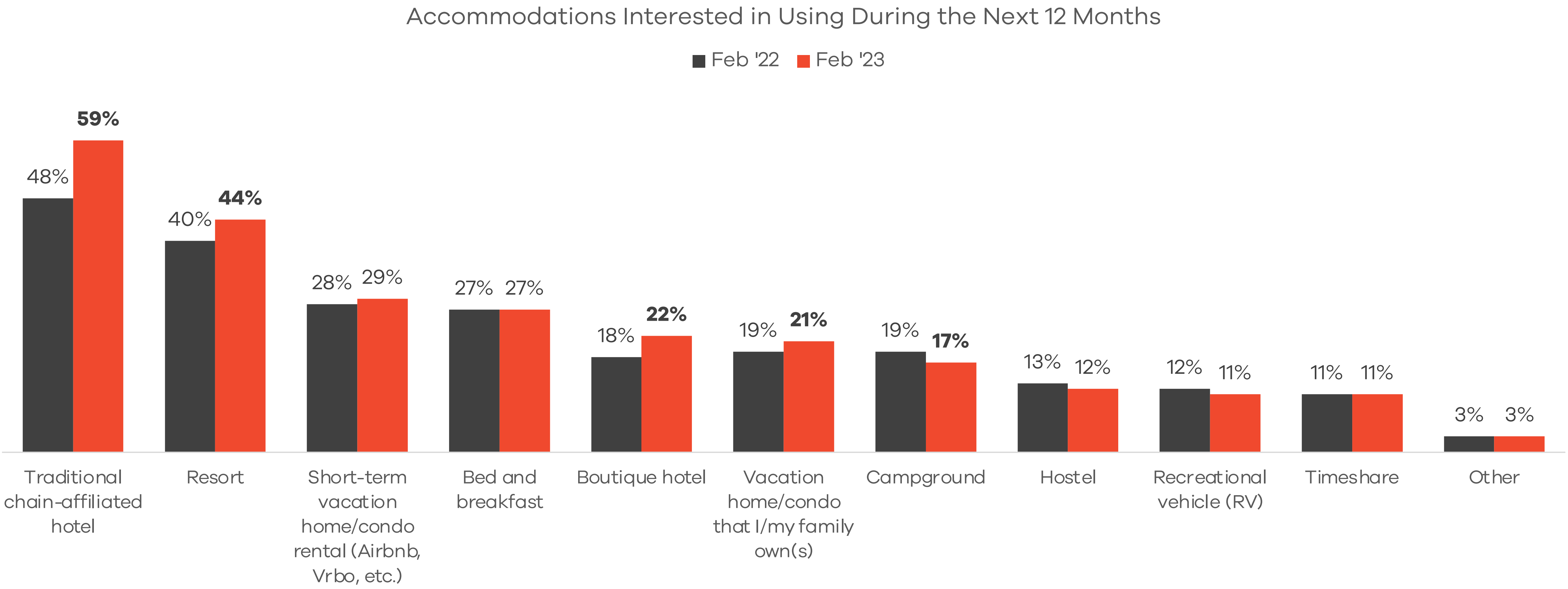

Spring Module
Accommodations
MMGY Travel Intelligence

Likelihood to Stay in a Hotel/Resort Has Increased From This Time Last Year While Staying in a Vacation Rental Has Remained Fairly Constant.



Base: Active leisure travelers who intend to vacation in the next six months (n=2,744)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Spring Edition"

Interest in Staying at Traditional Chain-Affiliated Hotels, Resorts and Boutique Hotels Has Increased From Last Year.

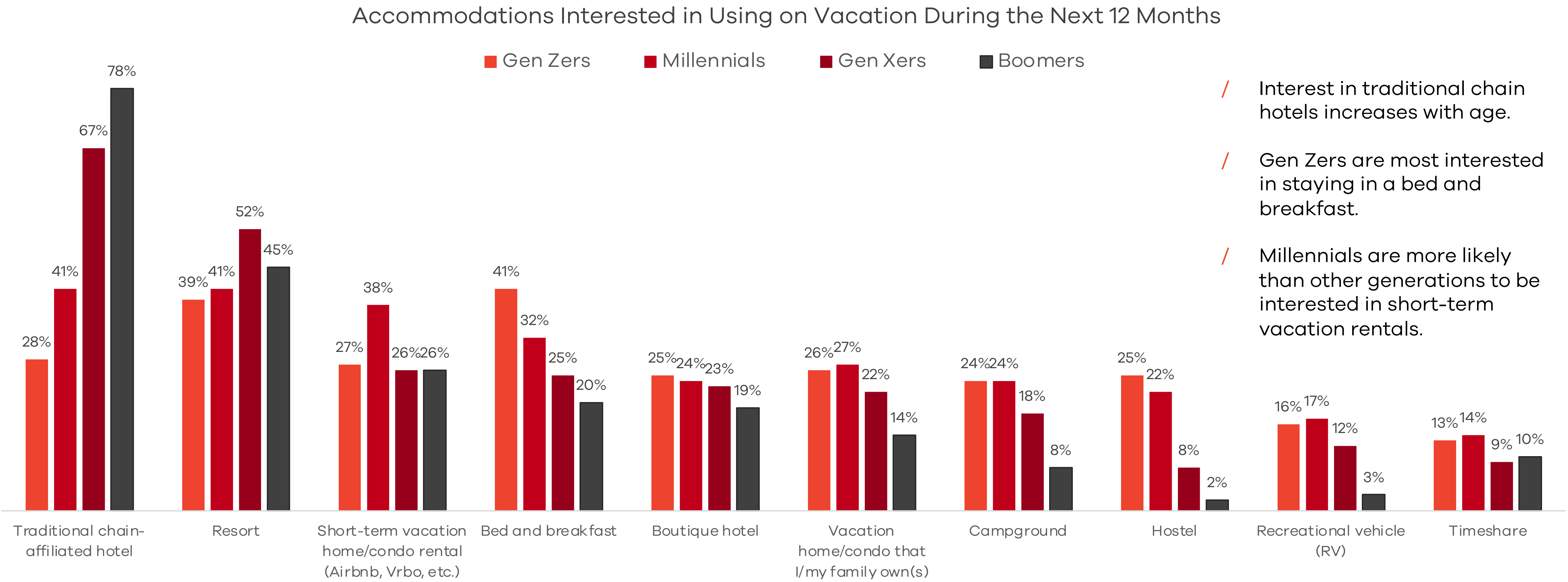


Data in bold indicates a significant difference from February 2022.

Base: Active leisure travelers (n=3,146)

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

Accommodation Interest Varies by Age.



- Interest in traditional chain hotels increases with age.
- Gen Zers are most interested in staying in a bed and breakfast.
- Millennials are more likely than other generations to be interested in short-term vacation rentals.

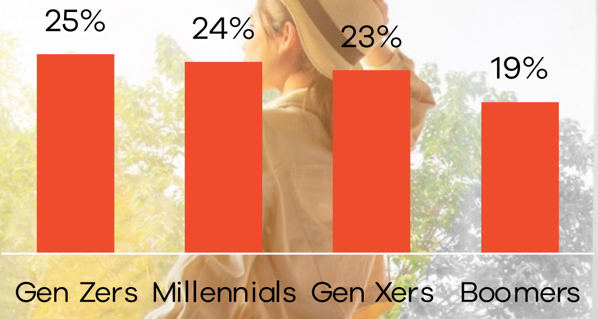
Base: Active leisure travelers (Gen Zers: n=344; Millennials: n=957; Gen Xers: n=721; Boomers: n=1,011)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Spring Edition"

Boutique Hotel Traveler

Defined as an active traveler who expresses an interest in staying in a boutique hotel during the next 12 months.

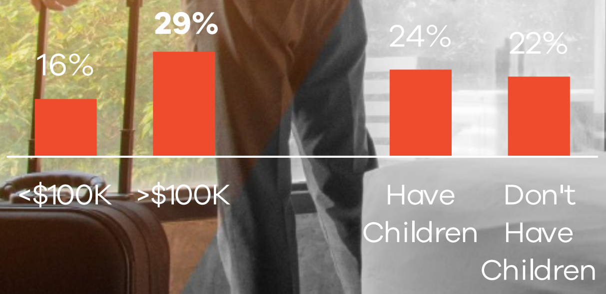
22%

of Active Leisure Travelers



4.5

Expected Leisure Trips During the Next 12 Months



Top Travel Motivators:

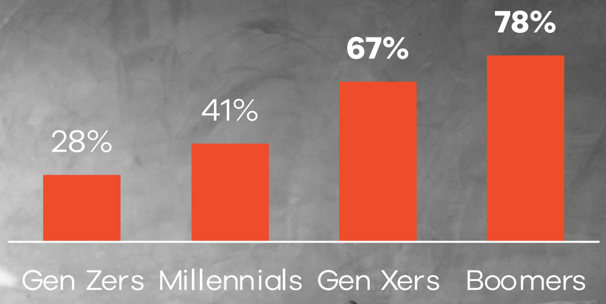
- **To get away and unplug (76%)**
- **Spend time with spouse/children (75%)**
- **Experience different cultures (71%)**
- **Experience new cuisines (71%)**
- **Explore nature/outdoors (68%)**

Traditional Hotel Traveler

Defined as an active traveler who expresses an interest in staying in a traditional hotel during the next 12 months.

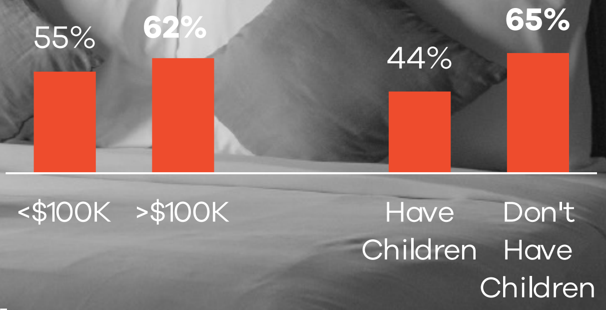
59%

of Active Leisure Travelers



4.0

Expected Leisure Trips During the Next 12 Months



Top Travel Motivators:

- **Spend time with spouse/children (77%)**
- **To get away and unplug (74%)**
- **Explore nature/outdoors (65%)**
- **Desire to visit friends/family (60%)**
- **Experience different cultures (57%)**

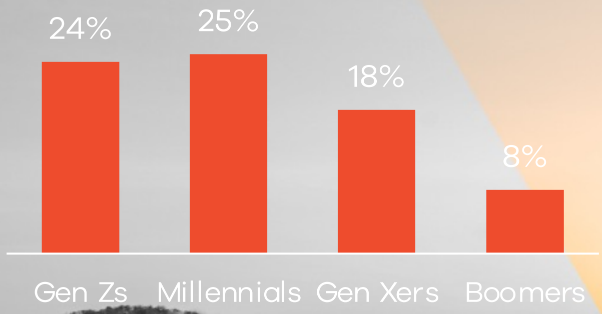
MMGY Travel Intelligence

The Camper

Defined as an active traveler who expresses an interest in staying at a campground during the next 12 months.

17%

of Active Leisure Travelers



4.6

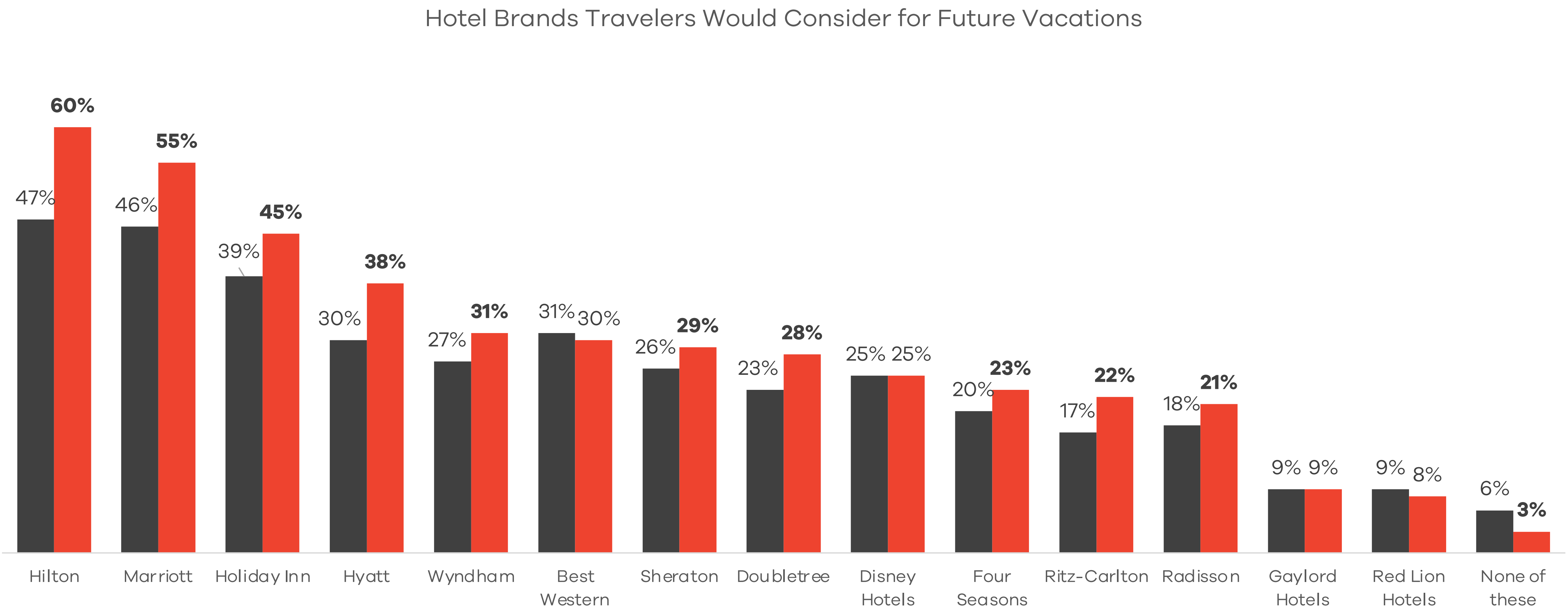
Expected Leisure Trips During the Next 12 Months

Top Travel Motivators:

- **Explore nature/outdoors (82%)**
- **Spend time with spouse/children (78%)**
- **To get away and unplug (75%)**
- **Desire to visit friends/family (65%)**
- **Experience different cultures (64%)**

MMGY Travel Intelligence

Future Interest in Many Hotel Brands Has Increased From 2022.



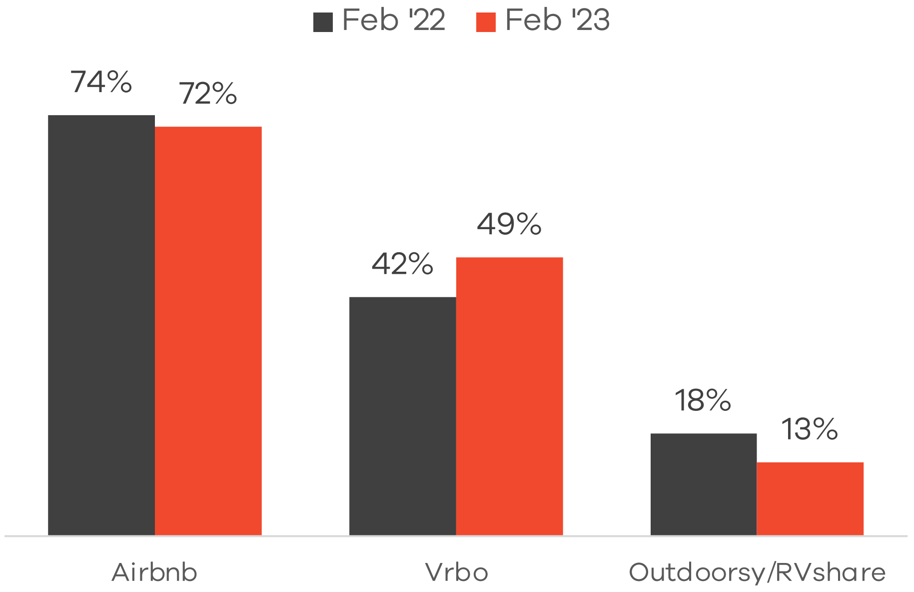
Data in bold indicates a significant difference from February 2022.

Base: Active leisure travelers (n=3,146)

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

Airbnb Continues to Dominate the Short-Term Rental Market.

Short-Term Vacation Rental Companies Likely to Use During Next 12 Months
(Among travelers interested in short-term rentals)



Reasons for Using a Short-Term Rental Instead of a Traditional Hotel (Among those interested in short-term rentals)	
I like the idea of vacationing in a home away from home	45%
I want to stay in a unique or unusual place	39%
Short-term rentals are less expensive than hotels	39%
Short-term rentals are typically more interesting in design than traditional hotels or resorts	31%
Short-term rentals are better for accommodating a large group	38%
Due to the COVID-19 pandemic, I feel that short-term rentals are safer than hotels	22%
I want to stay near the people I am visiting	25%
Short-term rentals allow me to vacation with locals in their neighborhood	22%
Other	2%

Base: Active leisure travelers interested in short-term rentals (n=918)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Spring Edition"

The Importance of Many Accommodation Features Has Increased From Last Year, Including Location, Value, Room Rate and Cleanliness Standards.

Important Features When Choosing Accommodations	Feb '22	Feb '23
Location	52%	**60%**
Value for the price	51%	**57%**
Room rate	46%	**53%**
Cleanliness standards/promise	45%	**51%**
Free breakfast	45%	**50%**
Previous experience/reputation of the accommodation brand	31%	**40%**
Food/restaurant options available at accommodation	34%	35%
Free internet access from public areas (pool, lobby, etc.)	31%	**35%**
Loyalty/frequent stay program	28%	**35%**
Located within walking distance of restaurants/bars	29%	31%
Swimming pool	27%	27%
Recommendation of friends/family	25%	27%
Consumer reviews	23%	**27%**
All-inclusive stay package	21%	**24%**
Complimentary late checkout option	20%	**24%**
Complimentary local transportation to restaurants/shopping	17%	**20%**
24-hour room service	15%	16%
On-site fitness center	12%	13%
Pets allowed to stay in-room	12%	13%
On-site spa	10%	9%
Wellness focus	9%	9%
Kids' club/organized family activities	9%	**7%**
Communal space to hang out, work or socialize	8%	7%

Data in bold indicates a significant difference from February 2022.

The Importance of Different Features Varies With Age and Income:

/ Older generations tend to be more selective in regards to their hotel choice than younger generations (i.e., they find many of the features to be more important than the younger generations).

/ Younger generations consider 24-hour room service, pets allowed in-room, a spa and a focus on wellness to be more important than older generations.

/ Travelers with higher incomes find loyalty programs to be more important than those with lower incomes.

Base: Active leisure travelers (n=3,146)

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

Accommodation Preferences of Luxury Travelers vs. Travel Bargain Hunters

Important Features When Choosing Accommodations	Luxury Travelers	Travel Bargain Hunters
Location	63%	**72%**
Value for the price	51%	**78%**
Room rate	49%	**68%**
Cleanliness standards/promise	58%	**67%**
Free breakfast	54%	**67%**
Previous experience/reputation of the accommodation brand	48%	50%
Food/restaurant options available at accommodation	44%	44%
Free internet access from public areas (pool, lobby, etc.)	39%	**44%**
Loyalty/frequent stay program	43%	**51%**
Located within walking distance of restaurants/bars	36%	**43%**
Swimming pool	34%	33%
Recommendation of friends/family	31%	32%
Consumer reviews	31%	**42%**
All-inclusive stay package	35%	32%
Complimentary late checkout option	29%	**34%**
Complimentary local transportation to restaurants/shopping	28%	27%
24-hour room service	**30%**	13%
On-site fitness center	**21%**	15%
Pets allowed to stay in-room	**19%**	11%
On-site spa	**18%**	9%
Wellness focus	**18%**	9%
Kids' club/organized family activities	**15%**	7%
Communal space to hang out, work or socialize	**15%**	9%

Data in bold indicates a significant difference from luxury travelers or travel bargain hunters.

/ Luxury travelers are more likely than travel bargain hunters to consider 24-hour room service, pets being allowed to stay in the room, an on-site fitness center, an on-site spa and a wellness focus to be important.

/ Travel bargain hunters are more likely to find location, value, room rate, cleanliness standards, free breakfast and internet, and loyalty programs to be important.

Base: Active leisure travelers (luxury travelers: n=546; travel bargain hunters: n=938)

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

MMGY Travel Intelligence

The Importance of Many of the Top In-Room Features Has Increased From Last Year.

Importance of In-Room Features/Attributes	Feb '22	Feb '23
Free internet access	51%	**59%**
Refrigerator (for personal use)	46%	**51%**
Size and/or layout of room	36%	**43%**
Microwave	35%	**39%**
Proper water temperature and pressure	32%	**38%**
Premium mattress	29%	**34%**
Multiple electrical outlets for charging personal devices	26%	**31%**
Free bottled water in room	27%	30%
Balcony	24%	28%
Sound-proof room	24%	26%
Premium bed linens	22%	**26%**
Free premium television channels (HBO, Starz, etc.)	23%	25%
Premium soaps, shampoos, conditioners	22%	23%
Free premium movie streaming channels (Netflix, Disney+, etc.)	21%	21%
Selection of pillows	19%	21%
In-room dining service without additional fees or delivery charges	17%	**14%**
In-room minibar/refrigerator stocked with drinks/snacks	15%	14%
Spa-style bathtub	13%	13%
Ability to watch in-room entertainment on personal mobile devices	12%	12%
Hardwood/tile flooring	9%	10%
Remote access to guest room from smartphone	8%	9%
Biometric access to guest room	6%	5%

Data in bold indicates a significant difference from February 2022.

Base: Active leisure travelers (n=3,146)

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

MMGY Travel Intelligence

ACCOMMODATIONS SUMMARY

KEY TAKEAWAY:

After observing a decrease in reported hotel stays during the pandemic, intentions to stay in a hotel or resort continue to increase from the past year. Seventy percent of active leisure travelers planning to take a vacation in the next six months are planning to stay in a hotel/resort, up from 60% in February 2022. We're also seeing increased interest in staying in a traditional chain-affiliated hotel in the next 12 months (up from 48% to 59%) as well as increased interest for resorts (up from 40% to 44%) and boutique hotels (up from 18% to 22%). Millennials, Gen Xers and Boomers are driving this increased interest in traditional chain-affiliated hotels. Similarly, we're seeing increased interest over last year in many of the top hotel brands including Hilton (up from 47% to 60%), Marriott (up from 46% to 55%), Holiday Inn (up from 39% to 45%) and Hyatt (up from 30% to 38%).

ACCOMMODATIONS SUMMARY

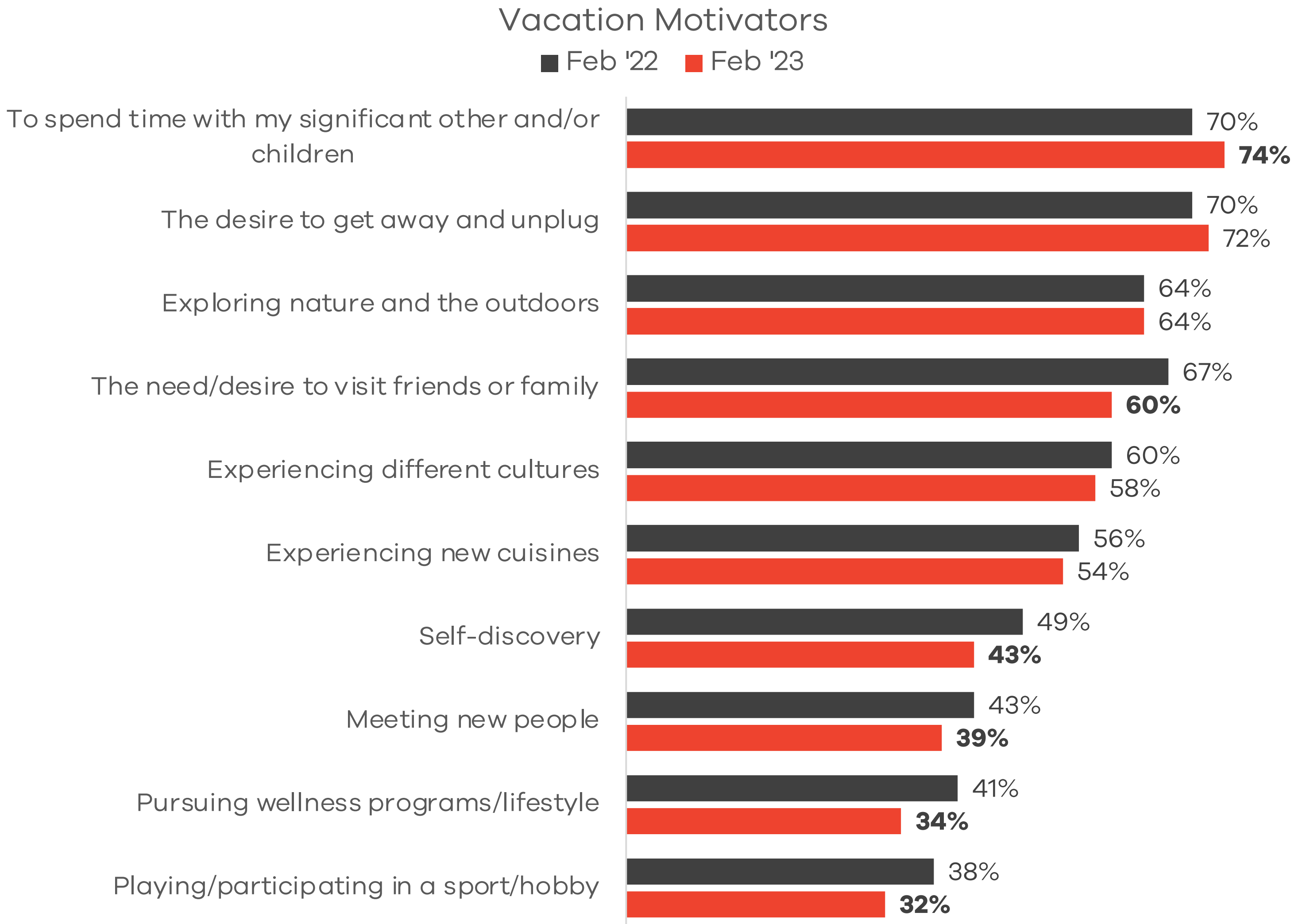
WHAT IT MEANS:

The hotel industry appears to be bouncing back after the pandemic shifted travelers' interests to perceived safer alternatives like short-term rentals and camping. We're seeing an increase in interest over last year in traditional chain-affiliated hotels, resorts and boutique hotels. Despite concerns about COVID-19 decreasing, cleanliness standards are still one of the top features travelers are looking for when choosing accommodations, so it is important to keep up these standards despite the decrease in focus on the pandemic.

Vacation Motivators and Activities

MMGY Travel Intelligence

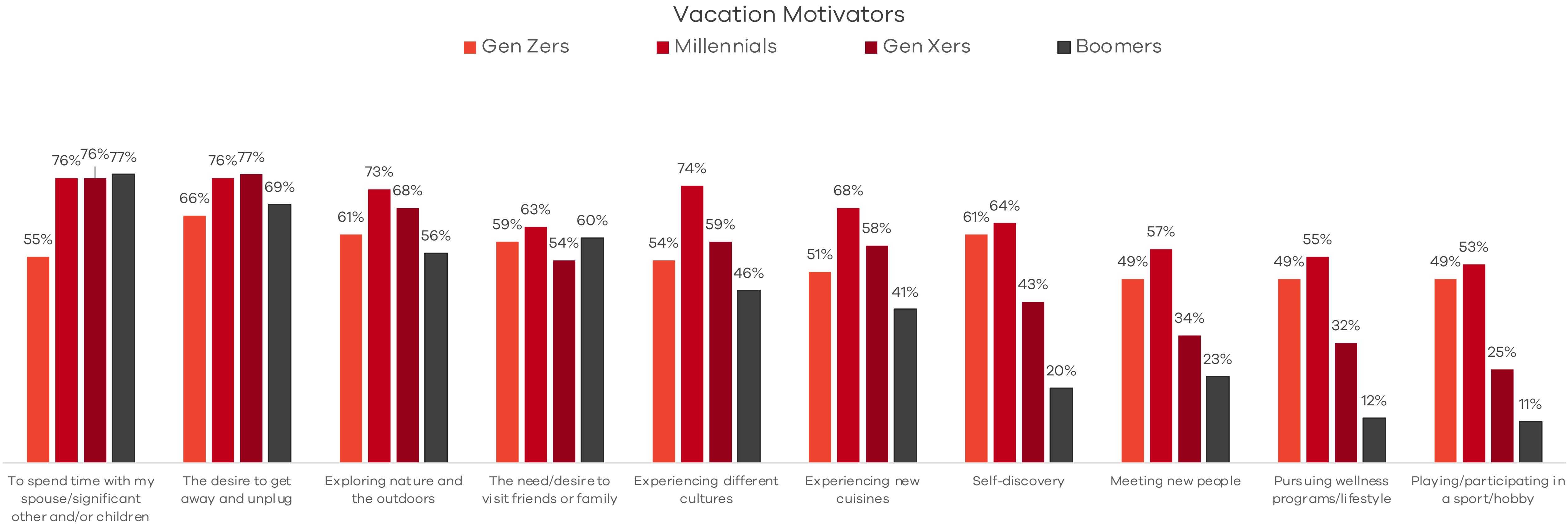
Spending Time With Family and "Unplugging" Continue to Be Top Motivators to Travel.



Data in bold indicates a significant difference from February 2022.
Base: Active travelers (n=3,146)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

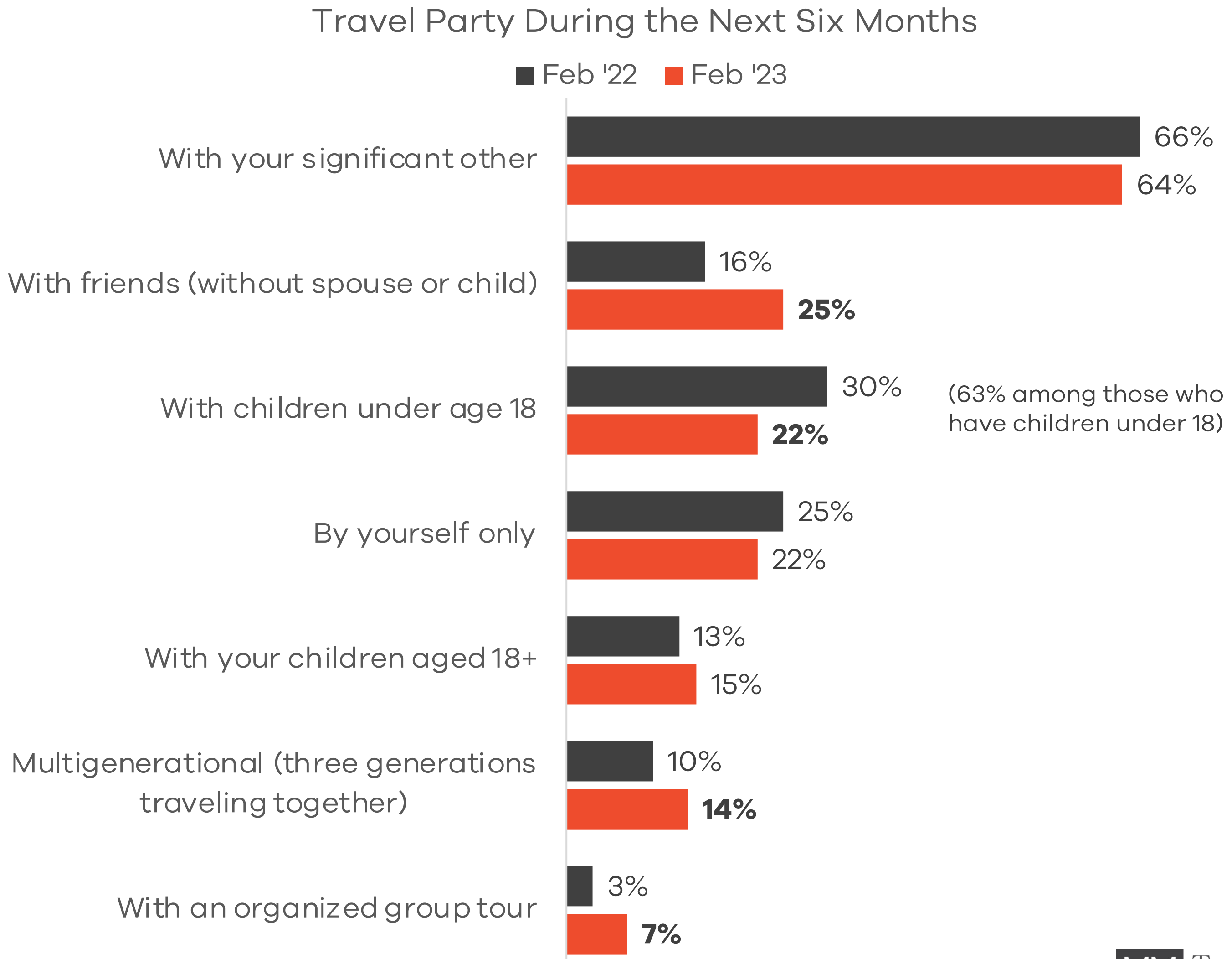
MMGY Travel Intelligence

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



Base: Active leisure travelers (Gen Zers: n=344; Millennials: n=957; Gen Xers: n=721; Boomers: n=1,011)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

Couples Travel Remains the Most Common Form of Travel.



Data in bold indicates a significant difference from February 2022.

Base: Active leisure travelers who intend to travel during the next six months (n=2,744)

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

MMGY Travel Intelligence

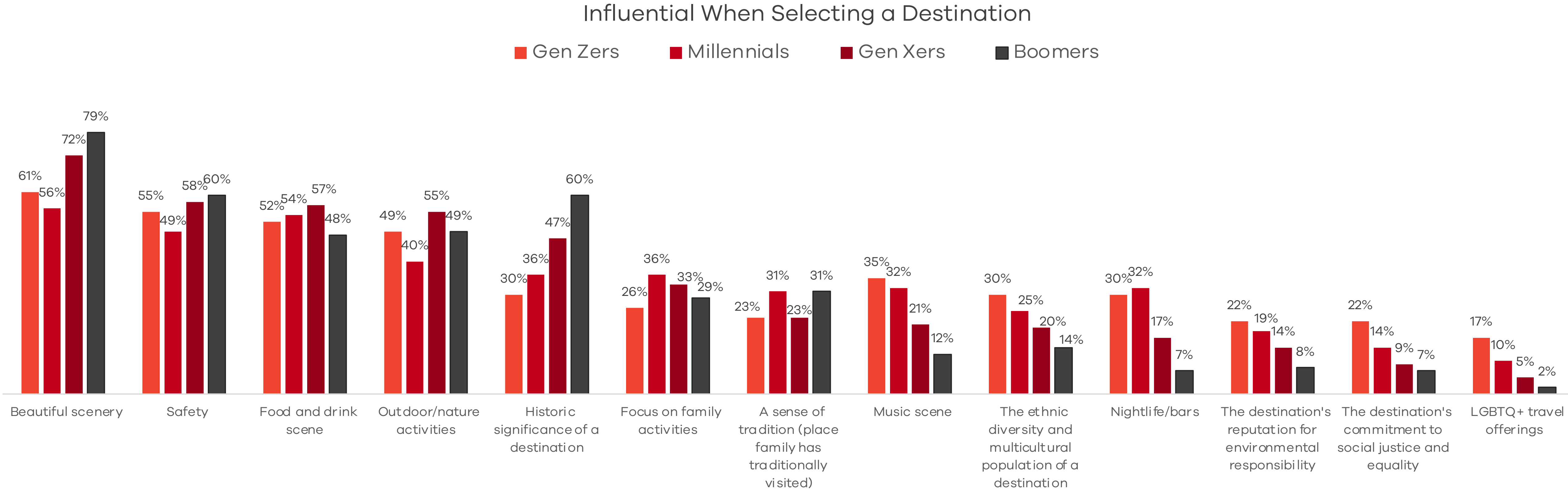
Scenery, Safety, and the Food and Drink Scene Continue to Be the Most Influential Factors When Selecting a Destination, All Increasing From Last Year.

Influential When Selecting a Destination (Top-2 Box)	**Feb '22**	**Feb '23**
Beautiful scenery	64%	**68%**
Safety	51%	**55%**
Food and drink scene	48%	**53%**
Outdoor/nature activities	44%	**47%**
Historic significance of a destination	39%	**46%**
Focus on family activities	32%	32%
A sense of tradition (place family has traditionally visited)	27%	28%
Music scene	20%	22%
The ethnic diversity and multicultural population of a destination	19%	21%
Nightlife/bars	16%	**20%**
The destination's reputation for environmental responsibility	15%	14%
The destination's commitment to social justice and equality	11%	11%
LGBTQ+ travel offerings	6%	7%

Data in bold indicates a significant difference from February 2022.

Base: Active leisure travelers (n=3,146)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Spring Edition"

Younger Generations Are More Likely to Be Influenced by the Music Scene, Nightlife and the Diversity of a Destination Than Their Older Counterparts.



Base: Active leisure travelers (Gen Zers: n=344; Millennials: n=957; Gen Xers: n=721; Boomers: n=1,011)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

Top Activities of Interest on Vacation

	Feb '22	Feb '23
Beach experiences	47%	**51%**
Historical sites	44%	**47%**
Visiting a state or national park	43%	**47%**
Shopping	45%	**47%**
Visiting a museum	37%	**43%**
Visiting a zoo or aquarium	NA	39%
Visiting a theme or amusement park	30%	**35%**
Visiting notable architectural sites	27%	**32%**
Hiking/climbing/biking/other outdoor adventures	29%	**32%**
Dining cruise	NA	31%
Guided tours with access to local experiences that are otherwise inaccessible	24%	**28%**
Attending a concert/music festival	22%	**27%**
Casino gambling	25%	26%
Adventure travel	21%	**24%**
Attending a sporting event	17%	**24%**
Dinner theater	NA	22%
Nightlife	20%	**22%**
Spa services (massages, facials, etc.)	17%	**21%**
Camping	NA	20%
Exploring family's ancestry/past on a heritage vacation	19%	20%
Attending performing arts events	15%	**20%**
Water sports (waterskiing, boating/rafting)	17%	**19%**
Film/art festivals	15%	**18%**
Scuba diving	11%	12%

Base: Active leisure travelers (n=3,146)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

Beach Experiences, Visiting State or National Parks, Shopping and Visiting 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 Zers	Millennials	Gen Xers	Boomers
Beach experiences	38%	44%	62%	57%
Historical sites	28%	32%	52%	64%
Visiting a state or national park	35%	37%	50%	61%
Shopping	51%	47%	52%	42%
Visiting a museum	33%	36%	45%	52%
Visiting a zoo or aquarium	38%	39%	45%	38%
Visiting a theme or amusement park	41%	37%	43%	28%
Visiting notable architectural sites	20%	25%	38%	39%
Hiking/climbing/biking/other outdoor adventures	35%	30%	42%	27%
Dining cruise	29%	31%	32%	32%
Guided tours with access to local experiences that are otherwise inaccessible	22%	24%	28%	33%
Attending a concert/music festival	26%	28%	30%	25%
Casino gambling	17%	24%	29%	29%
Adventure travel (safaris, mountain climbing, trekking vacations, etc.)	28%	29%	30%	15%
Attending a sporting event	23%	23%	23%	26%
Dinner theater	25%	24%	24%	18%
Nightlife	37%	32%	22%	10%
Spa services (massages, facials, etc.)	27%	25%	28%	11%
Camping	25%	26%	25%	9%
Exploring family's ancestry/past on a heritage vacation	19%	23%	24%	15%

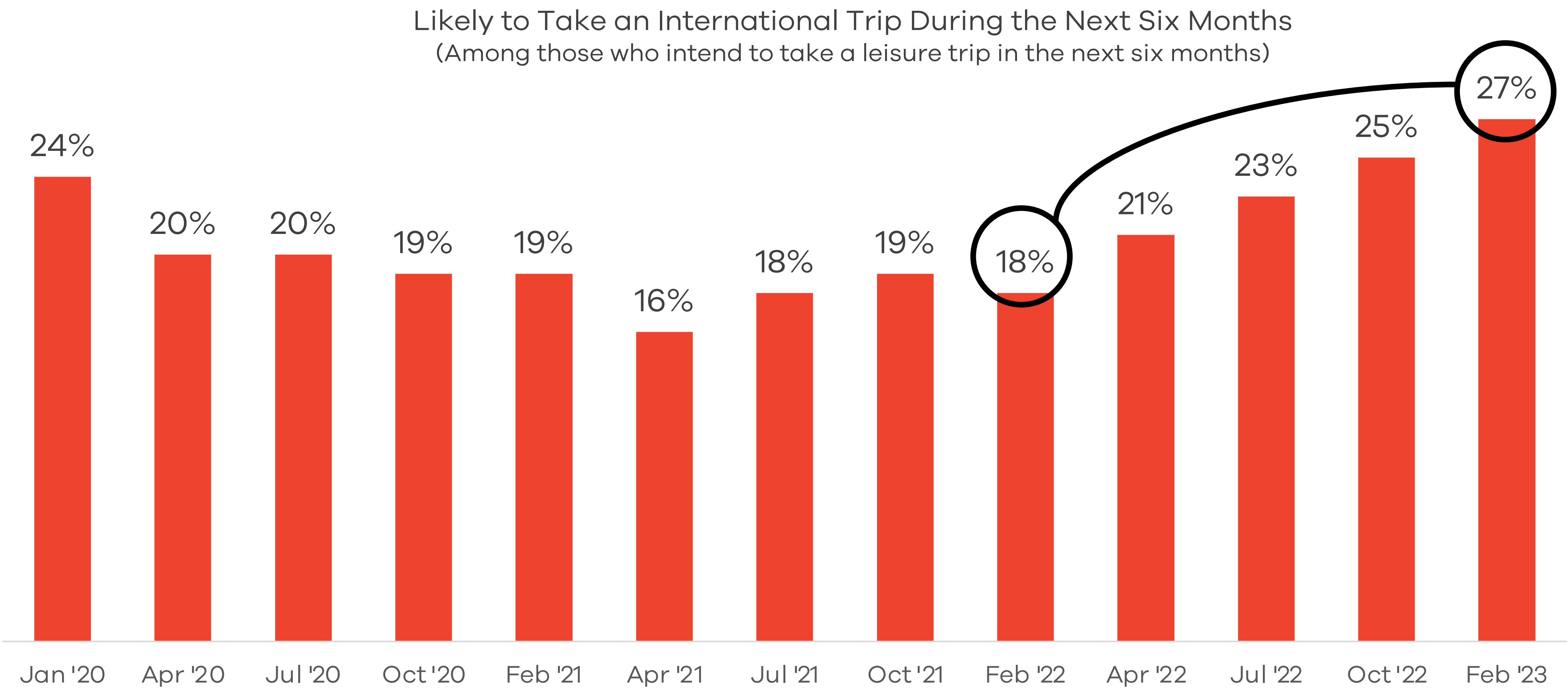
Base: Active leisure travelers (Gen Zers: n=344; Millennials: n=957; Gen Xers: n=721; Boomers: n=1,011)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Spring Edition"

MMGY Travel Intelligence

International Travel Intentions

MMGY Travel Intelligence

<u>Likelihood</u> to Take an International Trip Continues to Increase Significantly.



Base: Active leisure travelers who intend to travel during the next six months (n=2,637)

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

MMGY Travel Intelligence

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

73% 2022 **81%** 2023

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

Gen Zers: **88%**
Millennials: **88%**
Gen Xers: **87%**
Boomers: 70%

Have Kids: **91%**
Don't Have Kids: 77%

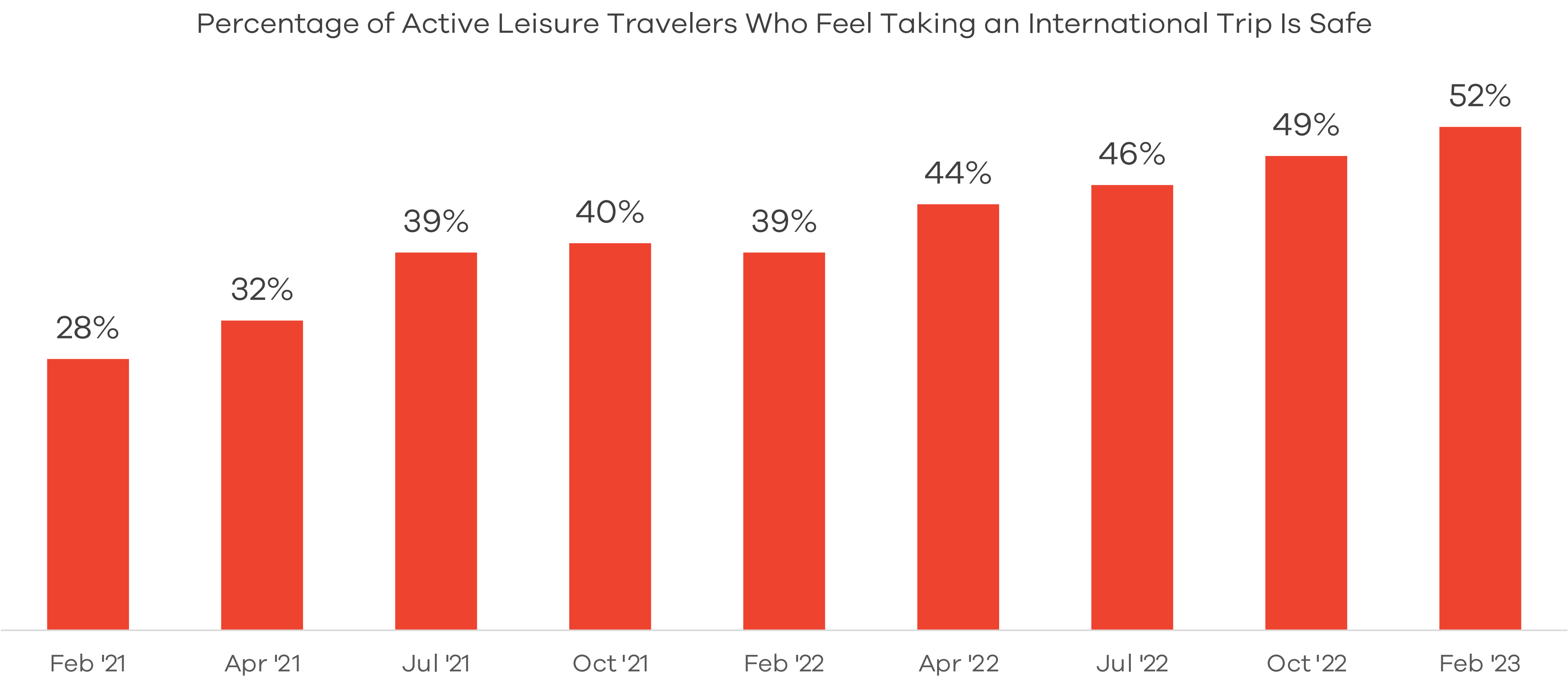
Less Than $100K: 75%
More Than $100K: **87%**

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

Base: Active leisure travelers (n=3,146)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Spring Edition"

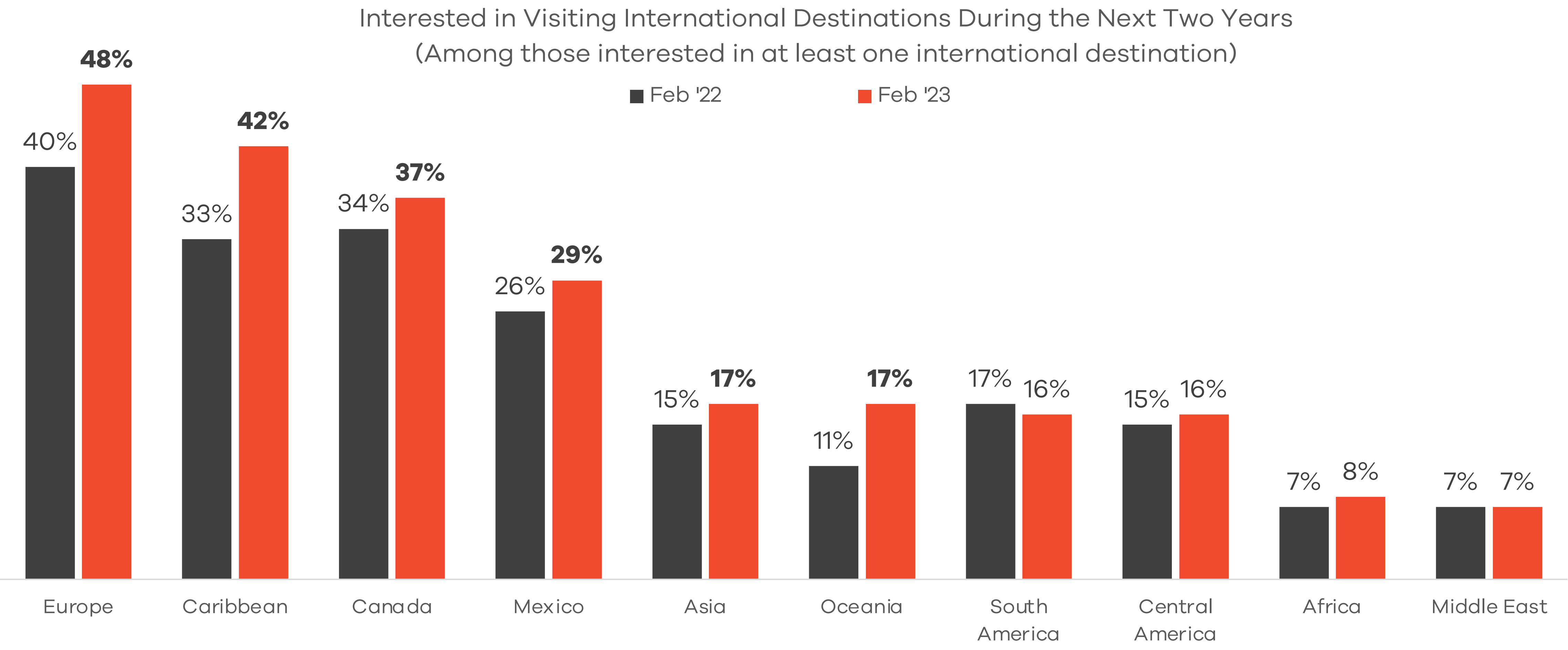
MMGY Travel Intelligence

Perceptions of the Safety of International Travel Continue to Increase



Base: Active leisure travelers (n=3,146)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Spring Edition"

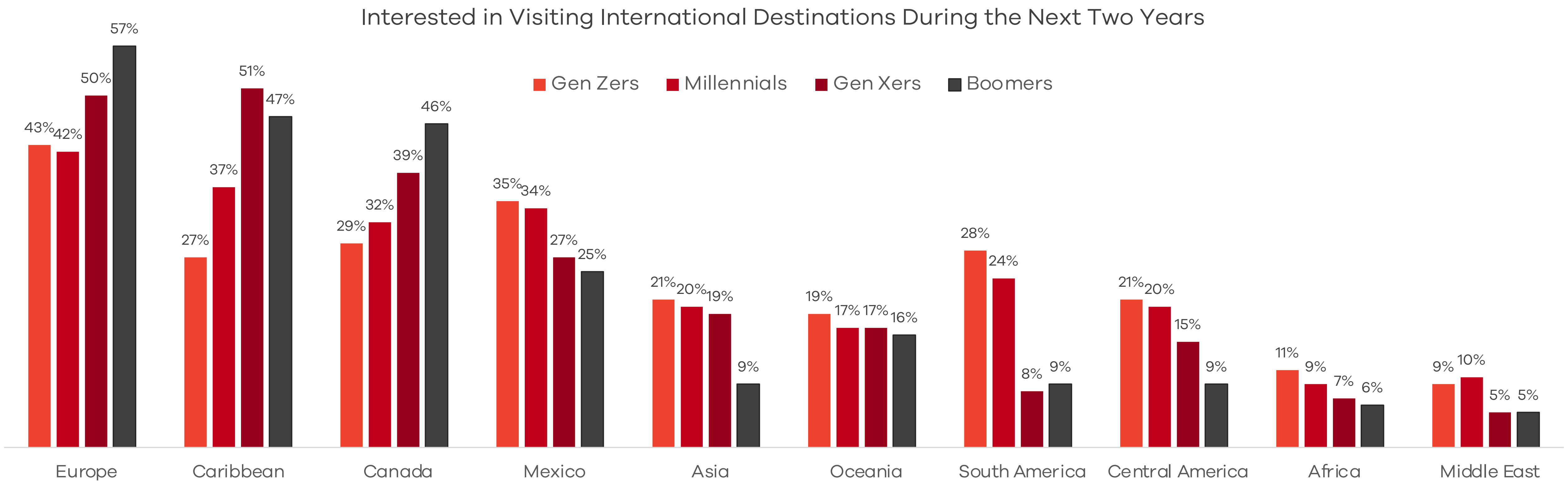
Interest in Many International Destinations Increased From One Year Ago.



Data in bold indicates a significant difference from 2022.
Base: Active leisure travelers interested in at least one international destination (n=2,551)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Spring Edition"

MMGY Travel Intelligence

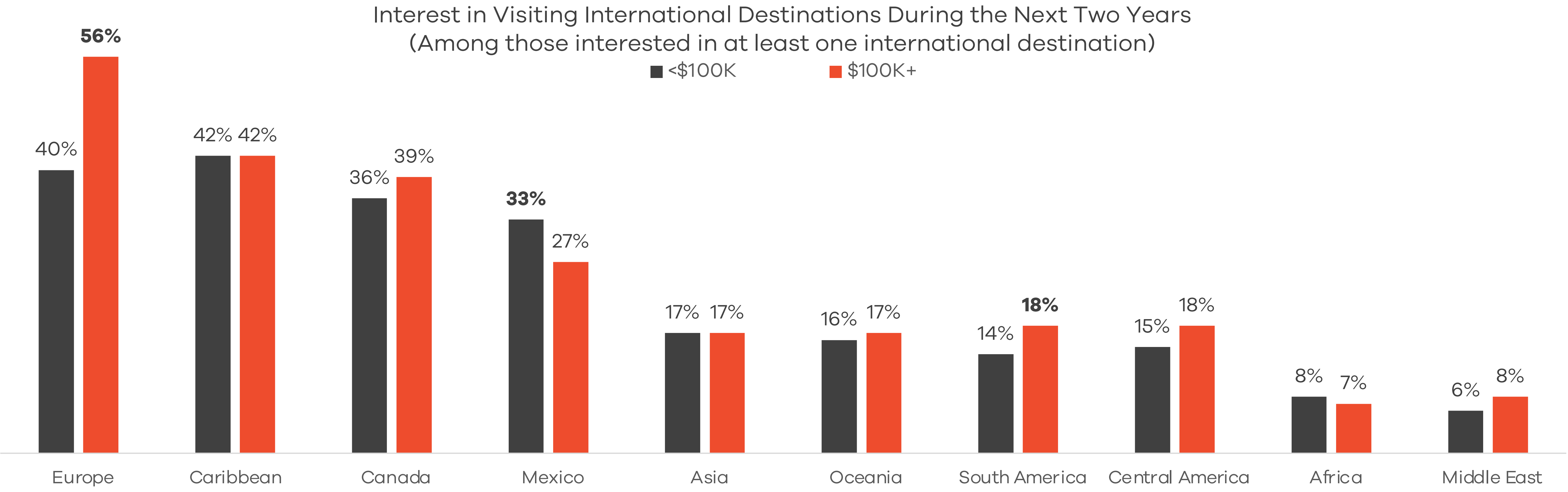
Interest in the More Popular International Destinations Increases With Age.



Base: Active leisure travelers interested in at least one international destination
(Gen Zers: n=304; Millennials: n=845; Gen Xers: n=625; Boomers: n=707)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

Interest in Some International Destinations Varies by Household Income.

/ Europe and South America are more appealing to travelers with a higher household income while Mexico is more appealing to those with household incomes of less than $100K.



Data in bold indicates a significant difference from the other group.
Base: Active leisure travelers interested in at least one international destination (<$100K: n=986; >$100K: n=1,411)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Spring Edition"

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

Caribbean Destinations Interested in Visiting During the Next Two Years	Feb '22	Feb '23
The Bahamas	47%	**55%**
U.S. Virgin Islands	41%	**46%**
Jamaica	35%	**42%**
Puerto Rico	32%	36%
Cayman Islands	28%	**36%**
St. Maarten/St. Martin	27%	**34%**
Aruba	27%	**33%**
Barbados	23%	**27%**
Dominican Republic	25%	27%
Bermuda	20%	**25%**
British Virgin Islands	22%	24%
Antigua	14%	**18%**
Cuba	10%	12%
Other	6%	5%

Mexico Destinations Interested in Visiting During the Next Two Years	Feb '22	Feb '23
Cancún	46%	**62%**
Los Cabos/Cabo San Lucas	31%	**44%**
Puerto Vallarta	31%	**38%**
Cozumel	27%	**37%**
Mexico City	35%	32%
Riviera Maya	24%	**29%**
Guadalajara	15%	17%
Other	8%	5%

Canada Destinations Interested in Visiting During the Next Two Years	Feb '22	Feb '23
Vancouver	41%	**54%**
Toronto	46%	50%
Montreal	43%	47%
Québec	35%	**44%**
Victoria	26%	27%
Banff	15%	**21%**
Whistler	15%	17%
Ottawa	24%	**16%**
Other	8%	6%

Data in bold indicates a significant difference from 2022.
Base: Active leisure travelers interested in visiting the Caribbean (n=1,072); Mexico (n=748); Canada (n=950)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Spring Edition"

INTERNATIONAL TRAVEL SUMMARY

KEY TAKEAWAY:

International travel intentions continue to rise. Eight in 10 active leisure travelers are interested in traveling internationally in the next two years, up significantly from the 73% who reported interest in February 2022. This interest is highest among Gen Zers, Millennials, Gen Xers, those with children and those with higher household incomes. We're also seeing a rise in likelihood to take an international vacation in the next six months, with 27% intending to do so – up from 18% in February 2022. With this increase in overall interest, we're seeing the desire to visit many international destinations increasing from last year including Europe (up from 40% to 48%), the Caribbean (up from 33% to 42%), Canada (up from 34% to 37%), Mexico (up from 26% to 29%), Asia (up from 15% to 17%) and Oceania (up from 11% to 17%).

INTERNATIONAL TRAVEL SUMMARY

WHAT IT MEANS:

International travel intentions and interest have continued on an upward trend over the past year. This may be partially due to a subset of travelers who are prioritizing international travel, but it could also be pent-up demand for international destinations that have only just rolled out the welcome mat for inbound international travelers. As COVID-19 concerns wane for most travelers, perceptions of international travel safety have continued to improve. This is good news for popular international destinations for U.S. travelers as well as for places like Asia and Oceania – only recently available to U.S. tourists – that have gained significant interest as a travel destination since last year.

MMGY Travel Intelligence

Respondent Demographics

Traveler Personas

Percent Who Self-Identify With Each Descriptor

	2022	2023
Beach lover	39%	41%
Foodie	33%	38%
Pet lover	31%	36%
Family traveler	32%	35%
Travel bargain hunter	24%	30%
Sports fan/enthusiast	21%	28%
Outdoor adventurer	24%	27%
Theme park enthusiast	22%	25%
Moderate (politically)	19%	23%
Conservative (politically)	20%	23%
World traveler	18%	23%
Environmentally conscious	20%	21%
Cruise lover	17%	21%
All-inclusive resort enthusiast	17%	20%
Concert/festival enthusiast	16%	19%
Liberal (politically)	18%	19%
Wine enthusiast	17%	18%
Luxury traveler	15%	17%
Recreational cannabis user	10%	12%
Golf enthusiast	9%	8%
Social justice activist	7%	8%
Ski/snowboard enthusiast	7%	7%
Road warrior (business travel)	5%	6%

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

Respondent Demographics

	Active Leisure Travelers	Gen Zers	Millennials	Gen Xers	Boomers
Male	54%	34%	61%	45%	59%
Female	45%	61%	38%	55%	41%
Other	1%	5%	2%	0%	0%
Gen Zers	11%	100%	-	-	-
Millennials	30%	-	100%	-	-
Gen Xers	23%	-	-	100%	-
Boomers	32%	-	-	-	100%
Household income (median)	$103K	$69.8K	$108.4K	$108K	$106.5K
Have children under 18 at home	32%	18%	62%	42%	2%
White	73%	45%	65%	71%	90%
Hispanic	18%	38%	26%	18%	3%
African American/Black	14%	29%	21%	10%	5%
Asian	8%	17%	7%	12%	4%
Native American	3%	4%	4%	3%	2%
Pacific Islander	2%	6%	2%	3%	0%
Other	4%	7%	5%	6%	0%

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

Respondent Demographics

	Active Leisure Travelers	Gen Zers	Millennials	Gen Xers	Boomers
Married/living together	66%	28%	63%	74%	77%
Never married	22%	64%	30%	13%	8%
Divorced/separated/widowed	12%	9%	8%	13%	15%
4 years or less of high school	31%	51%	33%	22%	28%
1–3 years of college	27%	29%	22%	27%	31%
4 years of college	27%	12%	30%	35%	25%
Some graduate school	3%	4%	2%	3%	4%
Graduate/professional degree	12%	4%	13%	13%	12%
Employed (full time or part time)	60%	56%	86%	73%	32%
Retired	25%	1%	1%	7%	62%
Temporarily unemployed	5%	11%	6%	5%	2%
Homemaker (full time)	7%	11%	5%	15%	4%
Student	3%	21%	2%	1%	0%

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

MMGY Travel Intelligence

THANK YOU

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