PORTRAIT OF AMERICAN TRAVELERS®

Winter 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 4,501 U.S. adults in October 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 3,299 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=3,299) is +/- 1.68% at the 95% level of confidence.

Generation	Age	% of Respondents
Gen Zers	18–24	14%
Millennials	25–40	29%
Gen Xers	41–56	24%
Boomers	57–75	29%
Silent/GI	76+	3%

MMGY Travel Intelligence


Key Insights
MMGY Travel Intelligence

Key Insights

Traveler Outlook

- As we move into the winter months, we're seeing short-term travel intentions on par with reported intentions this time last year. Six in 10 U.S. adults (58%) are planning to travel for leisure during the next six months, unchanged from last year. These intentions are also unchanged from the previous wave, with 59% reporting short-term travel intentions in August.
- While financial concerns are still top of mind for those not planning to travel in the short-term and have even increased in impact from last wave, these factors continue to decrease in impact for those who are traveling. Three in 10 active leisure travelers (31%) are being impacted by inflationary pressures on their household budget, down from 36% in 2022, followed by one-quarter who are being impacted by the price of gas (27%) or concerns for their personal financial situation (25%), both down from last year (41% and 28% respectively).
- We are continuing to see increased travel spending intentions during the next 12 months compared to last year despite travelers planning to take a similar number of trips during that time. Travelers plan to take 4.0 leisure trips during the next 12 months and spend $4,388 for those trips, compared to 3.9 trips in winter 2022 while only planning to spend $3,639. Six in 10 (61%) 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 (56%), and accommodations (52%) to cost more.

Where People Want to Visit

- Hawaii (66%), Florida (65%), Colorado (59%) and California (56%) garner the most state interest among active leisure travelers, with interest in Florida and Colorado increasing from last year (Florida: up from 62% to 65%; Colorado: up from 56% to 59%).
- The Island of Hawaiʻi (57%), Maui (57%), Las Vegas (56%), Florida Keys/Key West (56%) and Honolulu (55%) garner the most destination interest among active leisure travelers, despite the Island of Hawaiʻi and Honolulu displaying slight decreases in interest from last year (Island of Hawaiʻi: down from 60% to 57%; Honolulu: down from 60% to 55%).

Key Insights

Online Travel Agencies

- Three-quarters of active leisure travelers (76%) visit at least one online travel agency (OTA) on a regular basis when researching or booking travel. The most popular OTAs are Expedia (33%), Booking.com (30%) and Hotels.com (28%). Younger generations (Gen Zers: 87%; Millennials: 84%; Gen Xers: 81%) and those with children (87%) are most likely to visit OTAs when researching and booking travel.
- Travelers are using OTAs because of the ease of comparing multiple options. The most cited reason to visit an OTA is to compare prices and availability (69%) and the most cited reason to book with an OTA is the convenience of being able to compare multiple options (60%). Four in 10 travelers are using OTAs to book domestic accommodations (42%) or domestic flights (40%).

Loyalty Programs

- The most popular hotel brands among active leisure travelers are Marriott (49%) and Hilton (47%), followed by Holiday Inn (40%).
- The most popular airline brands among active leisure travelers are American Airlines (52%), Delta (50%), Southwest (47%) and United (46%).
- More than 4 in 10 active leisure travelers agree that they consider themselves to be loyal to an airline (44%) or hotel brand (43%), while 32% consider themselves loyal to a car rental brand and 27% to a cruise line.
- Half (51%) of travelers are active members of a hotel loyalty program, the most popular being Hilton Honors (58%) and Marriott Bonvoy (42%).
- Nearly half (47%) of travelers are active members of frequent flyer programs, the most popular being American Airlines AAdvantage (49%), Delta SkyMiles (45%), Southwest Rapid Rewards (39%) and United MileagePlus (35%).
- Travelers are loyal to brands because of overall satisfaction with previous experiences, consistent value for the price and level of service.

Social Media Habits

- More than 8 in 10 (85%) active leisure travelers have a personal page or profile on social media, with nearly all Gen Zers (99%) and Millennials (97%) being active on social media.

Key Insights

Social Media Habits (continued)

- Facebook/Meta (77%) continues to be the most popular social media platform among active leisure travelers, followed by Instagram (56%) and YouTube (53%). While many networks increased in usage among this group from last year, X (formerly Twitter) saw a significant decrease in usage (down from 40% to 28%).
- Among active leisure travelers currently using each platform, 38% are planning to use X less over the next year, followed closely by 37% who are planning to use Facebook less.
- Among active leisure travelers not currently using each platform, one-quarter are planning to use YouTube (26%) or Facebook (23%) over the next year.
- A similar percentage of active leisure travelers consider YouTube (22%), Facebook (18%) and Instagram (18%) to be the best for travel inspiration. Gen Zers and Millennials are most likely to turn to Instagram, while Gen Xers are most likely to turn to YouTube for travel inspiration.
- Nearly half (46%) of active leisure travelers have selected a vacation destination or travel service provider based at least partially on social media. One-third of travelers (32%) follow a vacation destination on social media, down slightly from the percentage reported last year (35%). Three in 10 (28%) follow a travel service provider on social media, also down slightly from the 31% reported in 2022. Gen Zers and Millennials, those with kids and those with household incomes of $100,000 or more are most likely to follow either on social media.
- A similar percentage of active leisure travelers follow celebrities (47%) and influencers/content creators (46%) on social media. Travelers report that influencers/content creators have more influence over their travel decisions than celebrities. Sixty-two percent indicate influencers have at least somewhat of an influence on their travel decisions, while only 52% indicate celebrities have a similar influence. Three-quarters (72%) of travelers who follow influencers/content creators perceive the travel content they share to be authentic representations of the destinations they visit. More than 4 in 10 travelers (43%) who follow either a celebrity or influencer on social media have made a travel purchase at least partially based on a post by a celebrity or influencer, down from the percentage reported last year (51%).

Key Insights

Social Media Habits (continued)

- Travelers are using social media to search for things to do (58%) and places to stay (50%) once they have decided on a destination. Four in 10 (40%) are using social media to share their travel experiences, Millennials (49%) more so than the remaining generations (Gen Zers: 45%; Gen Xers: 42%; Boomers: 26%).

Vacation Motivators and Activities

- Three in 10 active leisure travelers have used ChatGPT or another AI tool for travel planning (31%), to suggest accommodations (43%) or research flight options (42%). Slightly fewer travelers report using an AI tool for travel planning compared to those who reported doing so last wave (34%).
- As would be expected, Gen Zers (65%) and Millennials (48%) continue to be significantly more likely to turn to AI for travel planning than older generations.
- Safety of the destination (up from 56% to 59%), the food and drink scene (up from 54% to 58%), music scene (up from 23% to 28%) and nightlife (up from 20% to 23%) all increased in influence when selecting a destination from last year.

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 (80%), up from this time last year (75%).
- Interest in visiting Europe (up from 44% to 51%), Oceania (up from 13% to 19%), South America (up from 14% to 17%) and Africa (up from 9% to 11%) have increased from last year. Popular destinations like Europe continue to be more appealing to older travelers, while less popular destinations such as South America and Central America are more appealing to younger travelers.

Travel Outlook Snapshot

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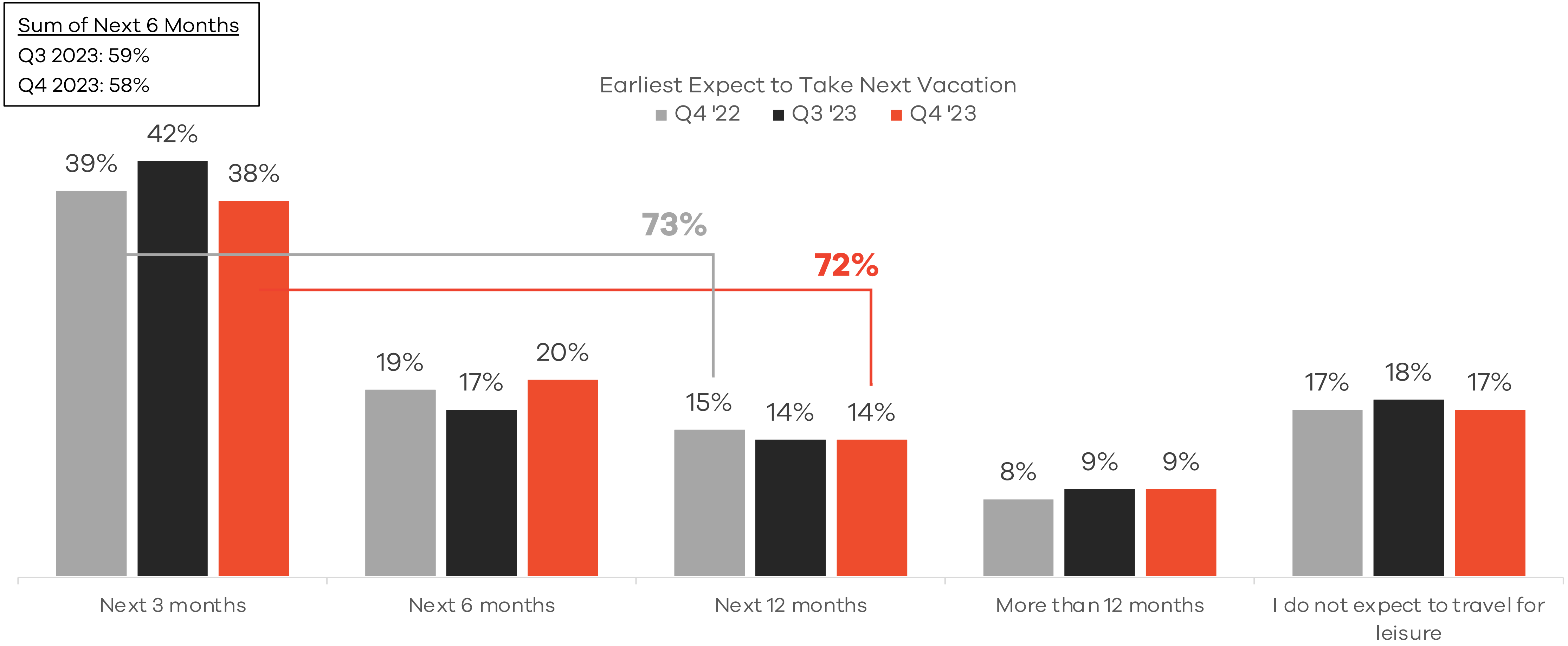
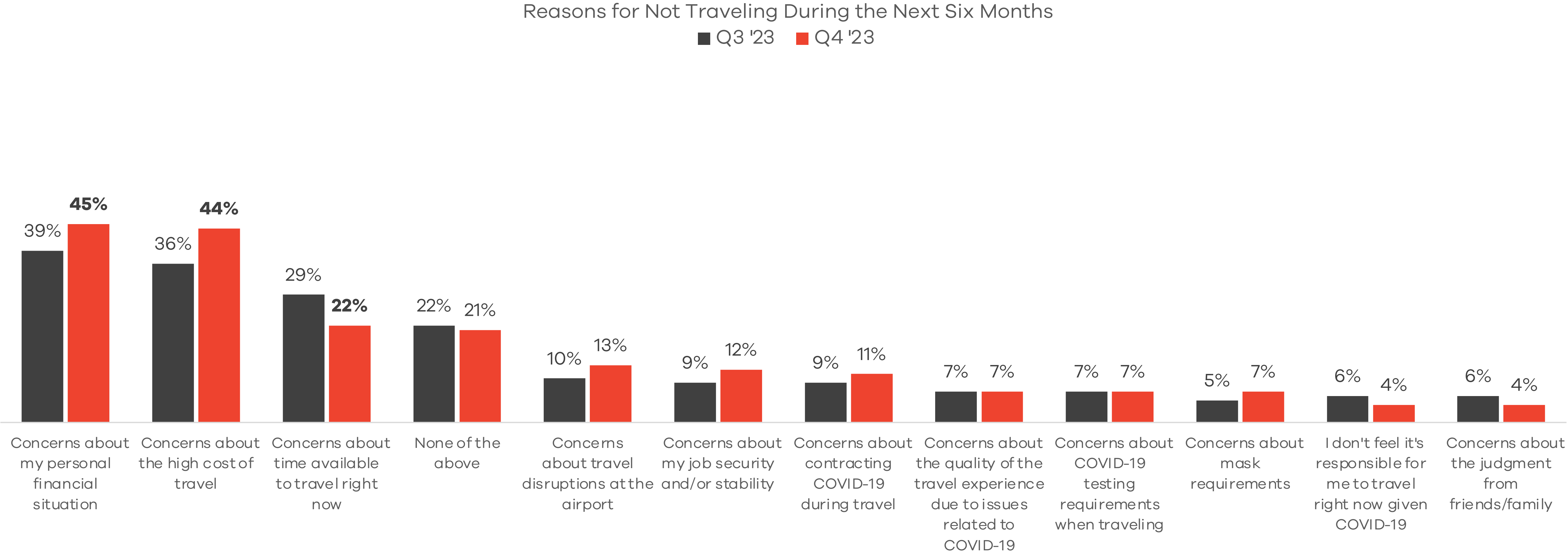
Short-Term Travel Intentions Are Unchanged From Both Last Quarter and This Time Last Year.



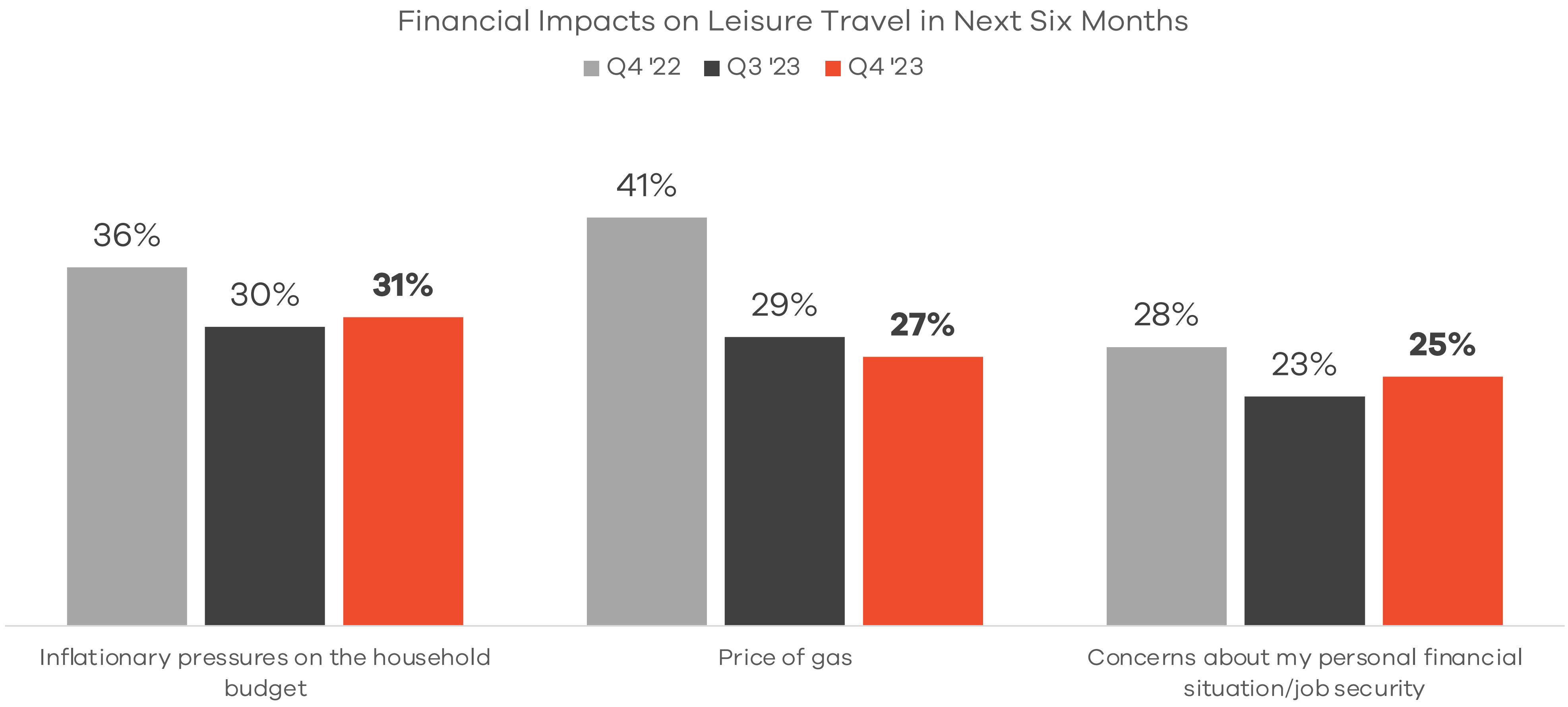
Base: U.S. adults (n=4,501)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

Concerns About Finances and the High Cost of Travel Continue to Be Top of Mind for Travelers Deciding Not to Travel in the Short-Term, Both Concerns Displaying Significant Increases in Impact From Last Wave.



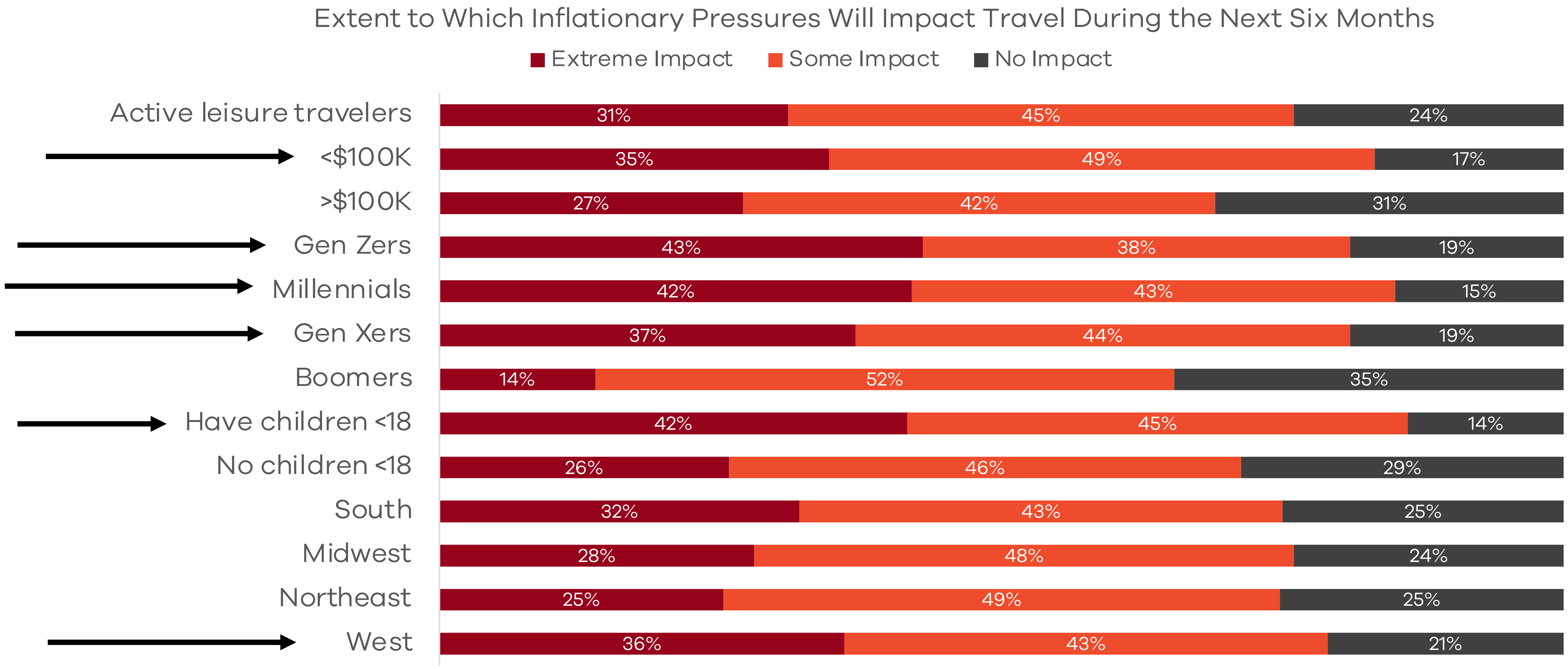
Data in bold indicates a statistically significant difference from Q3 2023.
Base: Active leisure travelers without travel plans during the next six months (n=648)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Winter Edition"

The Impacts of Inflationary Pressures and the Price of Gas on Leisure Travel Are Similar to Last Wave, While Showing Significant Decreases From This Time Last Year.



Data in bold indicates a statistically significant difference from Q4 2022.
Base: Active leisure travelers (n=3,299)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Winter Edition"

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



Base: Active leisure travelers (n=3,299)

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

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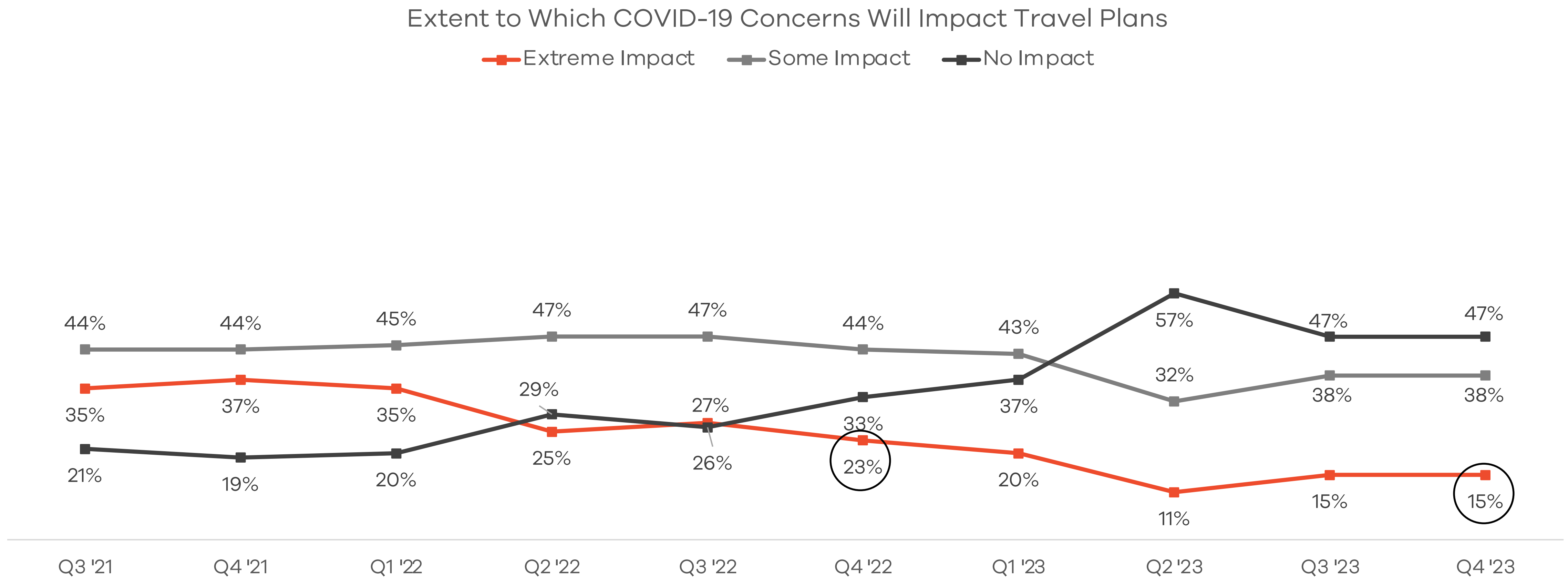
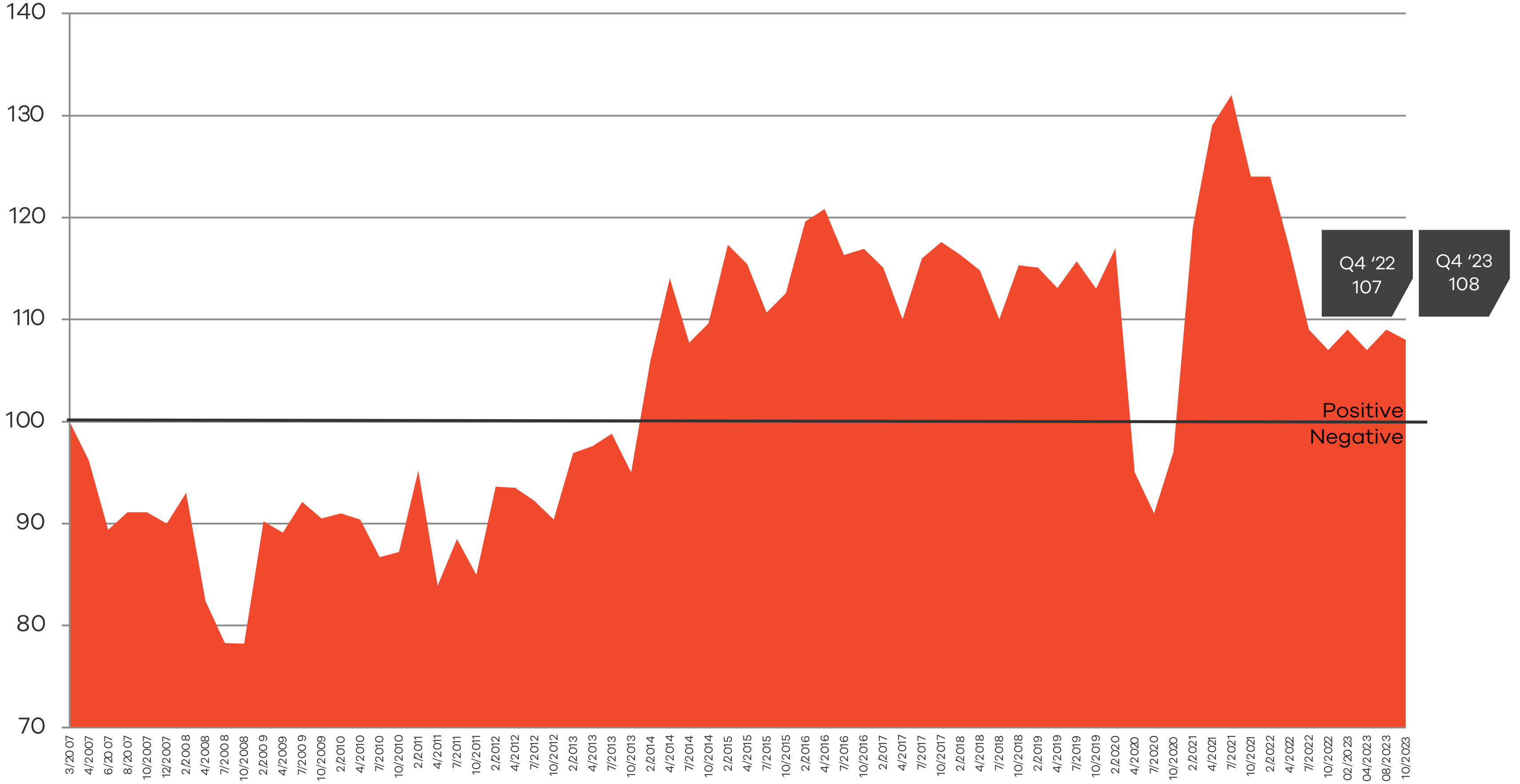
The Impact of COVID-19 on Travel Plans Is Unchanged From Last Wave and Continues to Be the Lowest It's Been in Recent Waves.



Base: Active leisure travelers (n=3,299)

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

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



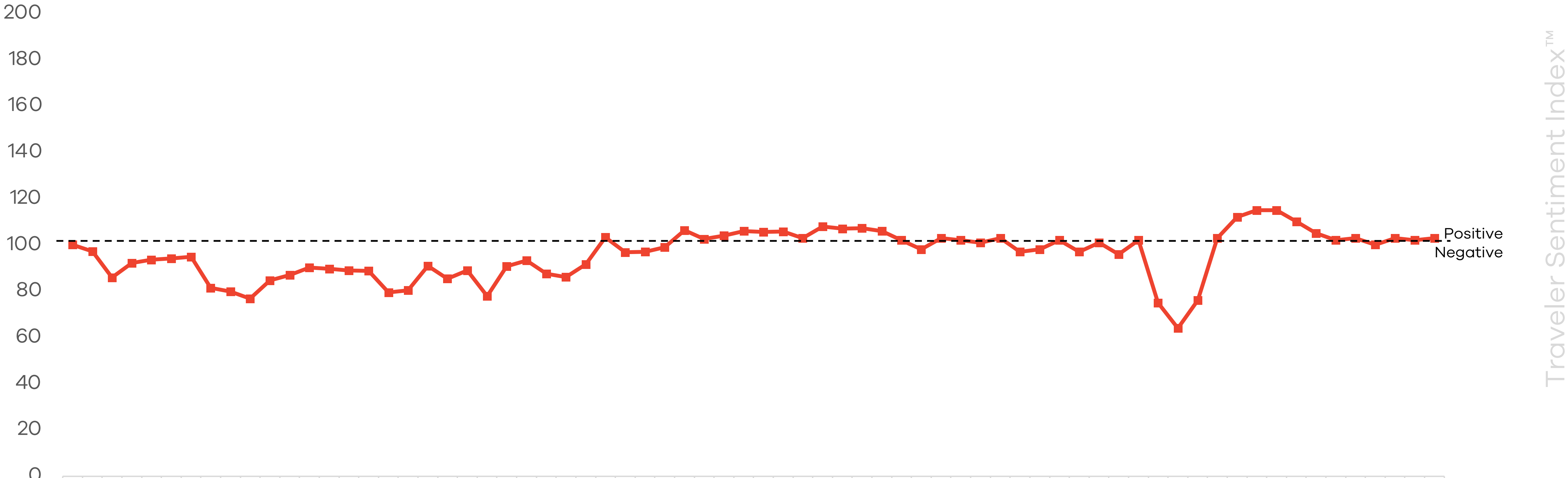
The Traveler Sentiment Index™ (TSI) consists of six variables, including interest in travel, time available for travel, personal finances available for travel, affordability of travel, quality of service and safety of travel. It provides a glimpse into how U.S. adults are feeling about travel this year 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=4,501)
Source: MMGY Global's *travelhorizons*™/2023 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Index 1: Interest in Travel



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

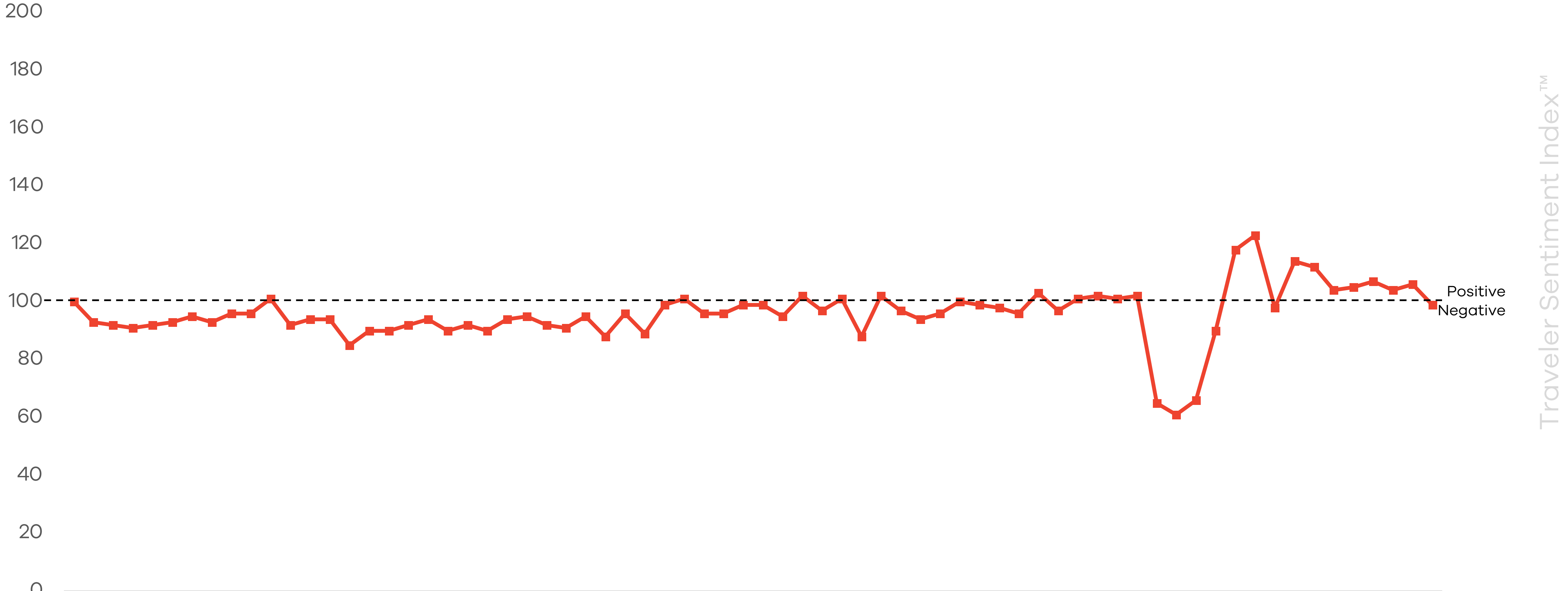
	Feb 11	Apr 11	Jul 11	Oct 11	Feb 12	Apr 12	Jul 12	Oct 12	Feb 13	Apr 13	Jul 13	Oct 13	Feb 14	Apr 14	Jul 14	Oct 14	Feb 15	Apr 15
U.S. Adults	91	85	89	78	91	93	88	86	92	103	97	97	99	106	103	104	106	106

	Jul 15	Oct 15	Feb 16	Apr 16	Jul 16	Oct 16	Feb 17	Apr 17	Jul 17	Oct 17	Feb 18	Apr 18	Jul 18	Oct 18	Feb 19	Apr 19	Jul 19	Oct 19
U.S. Adults	106	103	108	107	107	106	102	98	103	102	101	103	97	98	102	97	101	96

	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	Oct 23
U.S. Adults	102	75	64	76	103	112	115	115	110	105	102	103	100	103	102	103

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

Index 2: Safety of Travel

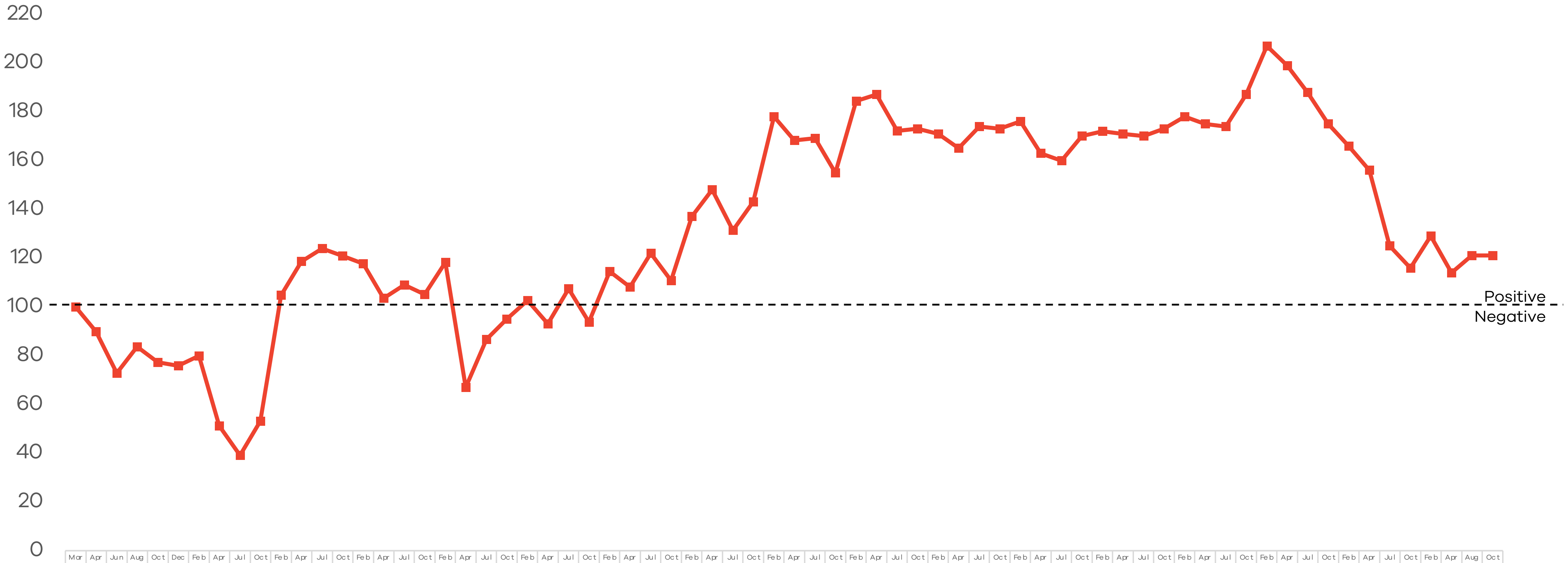


	Mar 07	Apr 07	Jun 07	Aug 07	Oct 07	Dec 07	Feb 08	Apr 08	Jul 08	Oct 08	Feb 09	Apr 09	Jul 09	Oct 09	Feb 10	Apr 10	Jul 10	Oct 10	Feb 11	Apr 11	Jul 11	Oct 11	Feb 12	Apr 12	Jul 12	Oct 12	Feb 13	Apr 13	Jul 13	Oct 13	Feb 14	Apr 14	Jul 14	Oct 14	Feb 15	Apr 15
U.S. Adults	100	93	92	91	92	93	95	93	96	96	101	92	94	94	85	90	90	92	94	90	92	90	94	95	92	91	95	88	96	89	99	101	96	96	99	99

	Jul 15	Oct 15	Feb 16	Apr 16	Jul 16	Oct 16	Feb 17	Apr 17	Jul 17	Oct 17	Feb 18	Apr 18	Jul 18	Oct 18	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	Oct 23
U.S. Adults	95	102	97	101	88	102	97	94	96	100	99	98	96	103	97	101	102	101	102	65	61	66	90	118	123	98	114	112	104	105	107	104	106	99

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter 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
U.S. Adults	100	90	73	84	77	76	80	51	39	53	105	119	124	121	118	104	109	105

	Feb 11	Apr 11	Jul 11	Oct 11	Feb 12	Apr 12	Jul 12	Oct 12	Feb 13	Apr 13	Jul 13	Oct 13	Feb 14	Apr 14	Jul 14	Oct 14	Feb 15	Apr 15
U.S. Adults	118	67	87	95	103	93	107	94	115	108	122	111	137	148	131	143	178	168

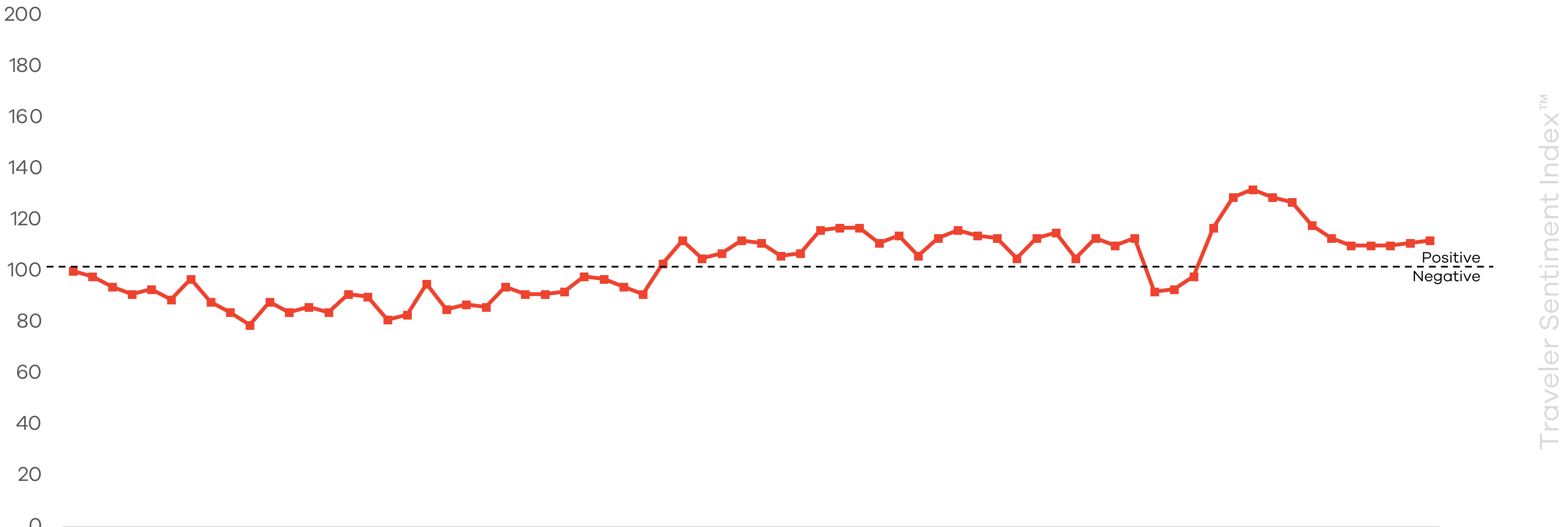
	Jul 15	Oct 15	Feb 16	Apr 16	Jul 16	Oct 16	Feb 17	Apr 17	Jul 17	Oct 17	Feb 18	Apr 18	Jul 18	Oct 18	Feb 19	Apr 19	Jul 19	Oct 19
U.S. Adults	169	155	184	187	172	173	171	165	174	173	176	163	160	170	172	171	170	173

	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	Oct 23
U.S. Adults	178	175	174	187	207	199	188	175	166	156	125	116	129	114	121	121

Traveler Sentiment Index™

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

Index 4: Time Available for Travel



	Mar 07	Apr 07	Jun 07	Aug 07	Oct 07	Dec 07	Feb 08	Apr 08	Jul 08	Oct 08	Feb 09	Apr 09	Jul 09	Oct 09	Feb 10	Apr 10	Jul 10	Oct 10
U.S. Adults	100	98	94	91	93	89	97	88	84	79	88	84	86	84	91	90	81	83

	Feb 11	Apr 11	Jul 11	Oct 11	Feb 12	Apr 12	Jul 12	Oct 12	Feb 13	Apr 13	Jul 13	Oct 13	Feb 14	Apr 14	Jul 14	Oct 14	Feb 15	Apr 15
U.S. Adults	95	85	87	86	94	91	91	92	98	97	94	91	103	112	105	107	112	111

	Jul 15	Oct 15	Feb 16	Apr 16	Jul 16	Oct 16	Feb 17	Apr 17	Jul 17	Oct 17	Feb 18	Apr 18	Jul 18	Oct 18	Feb 19	Apr 19	Jul 19	Oct 19
U.S. Adults	106	107	116	117	117	111	114	106	113	116	114	113	105	113	115	105	113	110

	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	Oct 23
U.S. Adults	113	92	93	98	117	129	132	129	127	118	113	110	110	110	111	112

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

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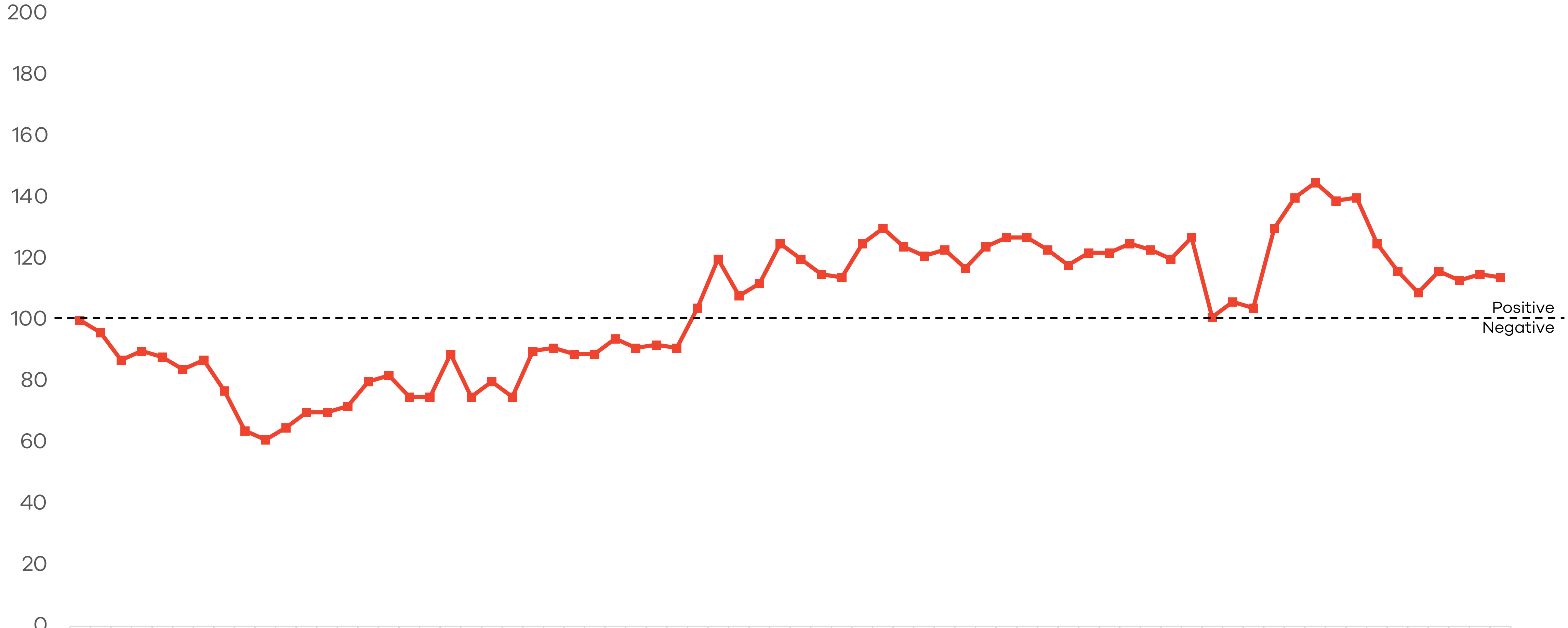
Index 5: Personal Finances Available for Travel



	Mar 07	Apr 07	Jun 07	Aug 07	Oct 07	Dec 07	Feb 08	Apr 08	Jul 08	Oct 08	Feb 09	Apr 09	Jul 09	Oct 09	Feb 10	Apr 10	Jul 10	Oct 10
U.S. Adults	100	96	87	90	88	84	87	77	64	61	65	70	70	72	80	82	75	75

	Feb 11	Apr 11	Jul 11	Oct 11	Feb 12	Apr 12	Jul 12	Oct 12	Feb 13	Apr 13	Jul 13	Oct 13	Feb 14	Apr 14	Jul 14	Oct 14	Feb 15	Apr 15
U.S. Adults	89	75	80	75	90	91	89	89	94	91	92	91	104	120	108	112	125	120

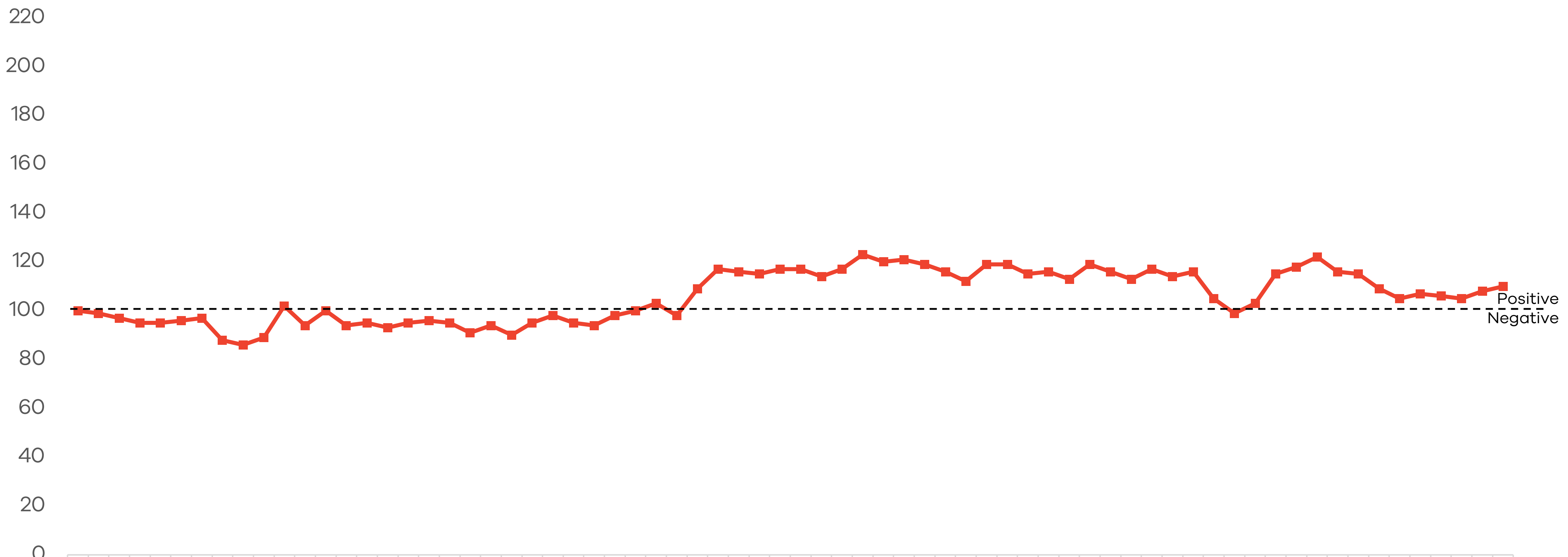
	Jul 15	Oct 15	Feb 16	Apr 16	Jul 16	Oct 16	Feb 17	Apr 17	Jul 17	Oct 17	Feb 18	Apr 18	Jul 18	Oct 18	Feb 19	Apr 19	Jul 19
U.S. Adults	115	114	125	130	124	121	123	117	124	127	127	123	118	122	122	125	123

	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	Oct 23
U.S. Adults	120	127	101	106	104	130	140	145	139	140	125	116	109	116	113	115	114

Traveler Sentiment Index™

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

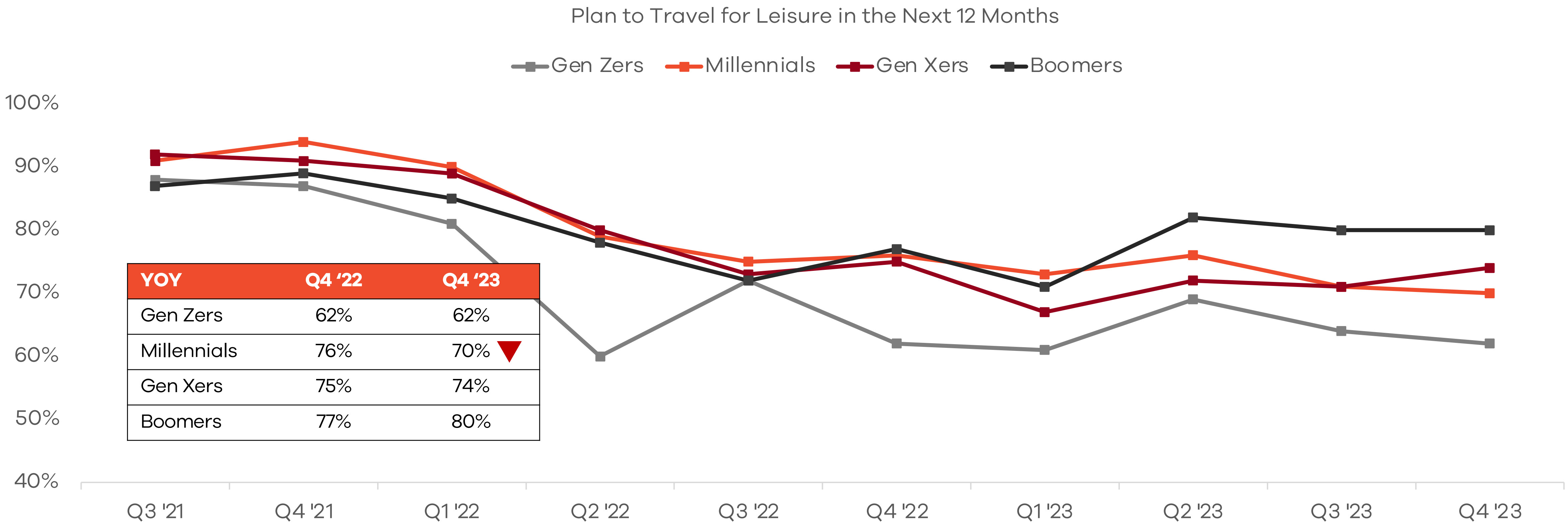
	Feb 17	Apr 17	Jul 17	Oct 17	Feb 18	Apr 18	Jul 18	Oct 18	Feb 19	Apr 19	Jul 19	Oct 19	Feb 20	Apr 20
U.S. Adults	116	112	119	119	115	116	113	119	116	113	117	114	116	105

	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	Oct 23
U.S. Adults	99	103	115	118	122	116	115	109	105	107	106	105	108	110

Traveler Sentiment Index™

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

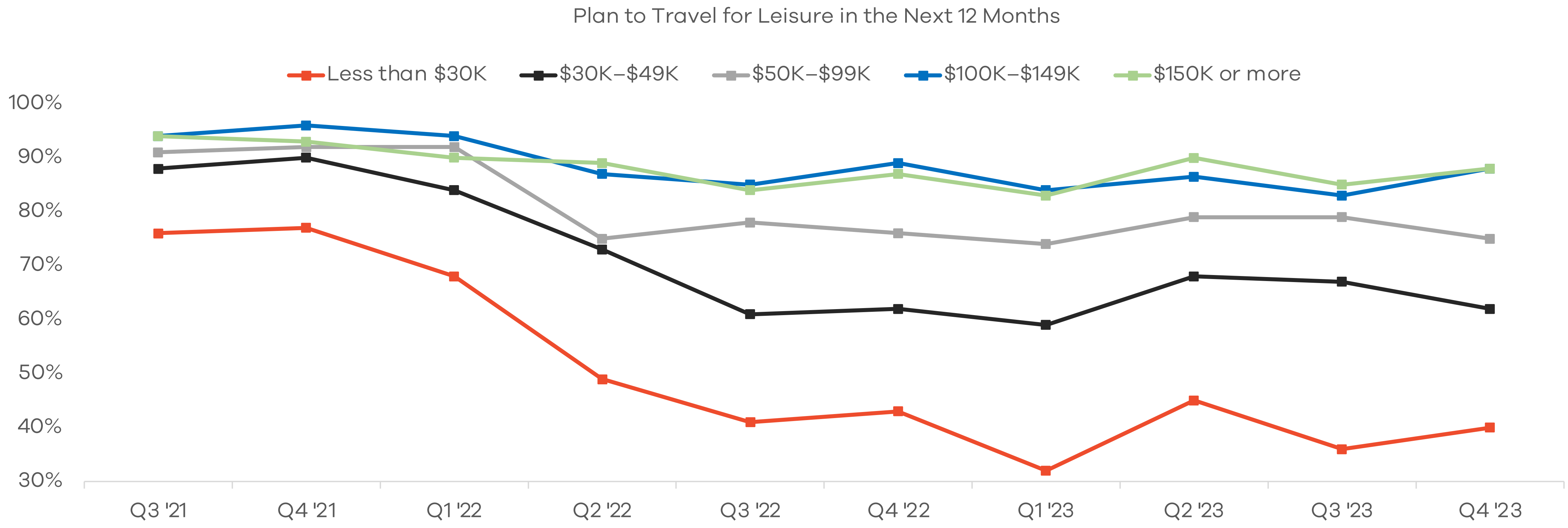
Millennials Displayed the Only Decrease in Travel Intentions From Last Year, While the Travel Intentions of the Remaining Generations Are Relatively Unchanged.



YOY	Q4 '22	Q4 '23
Gen Zers	62%	62%
Millennials	76%	70% ▼
Gen Xers	75%	74%
Boomers	77%	80%

Base: U.S. adults (Gen Zers: n=610; Millennials: n=1,327; Gen Xers: n=1,096; Boomers: n=1,314)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Winter Edition"

Compared to Last Year, Travel Intentions Across All Household Incomes Are Unchanged.



Base: U.S. adults (<$30K: n=697; $30K–$49K: n=587; $50K–$99K: n=1,285; $100K–$149K: n= 825; $150K+: 1,107)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

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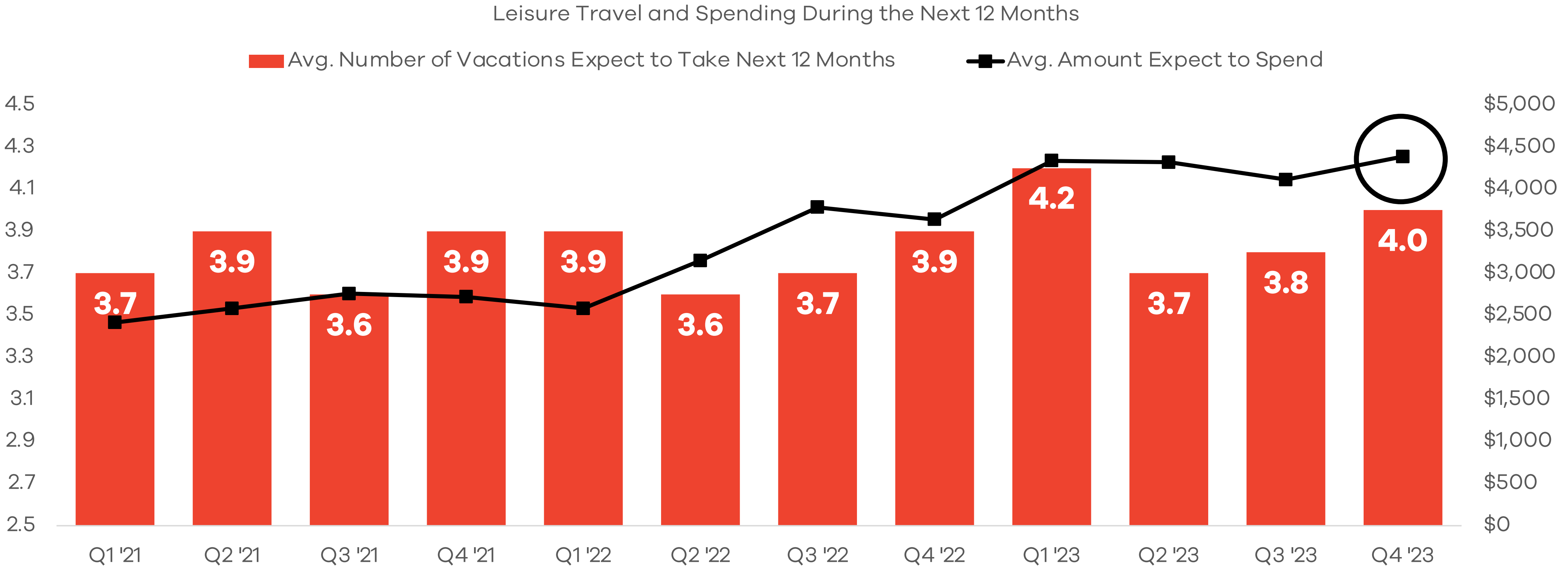
Continuing the Trend We've Seen Throughout This Year, Travelers Are Planning to Take a Similar Number of Leisure Trips in the Next 12 Months, While Their Expected Travel Spend During That Time Is Up Significantly.



Base: Active leisure travelers (n=3,299)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

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Compared to Last Wave, a Similar Number of Travelers Have Increased Their Travel Budget Because of the Increasing Costs Associated With Travel Compared to Recent Years.

61%

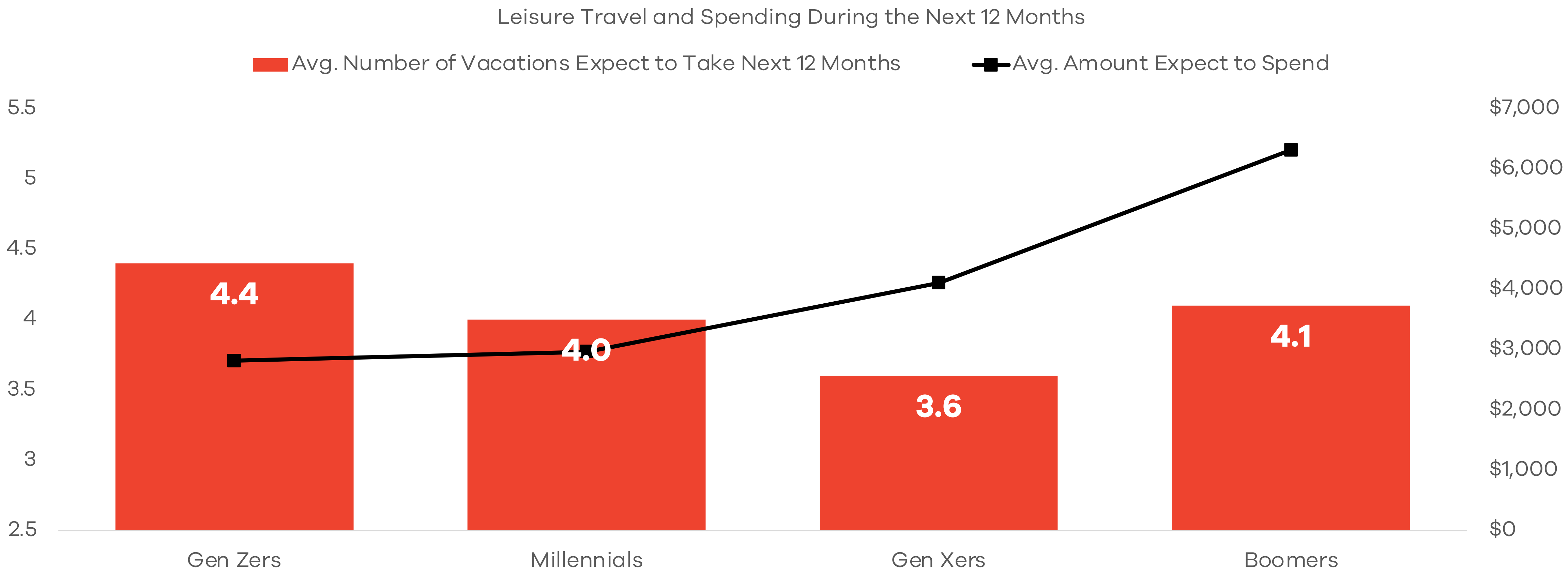
of active leisure travelers plan to spend more on travel in the next 12 months than they have spent in either of the past two years (compared to 63% in Q3 '23).

Factors That Have Contributed to Increases in Travel Budget	Q3 '23	Q4 '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%	56%
I expect to spend more because vacation lodging/accommodations seem to cost more now than they did a few years ago	53%	52%
I expect to spend more because the price of gas is higher now than it was the past few years	46%	44%
I expect to spend more because airline travel seems to cost more now than it did a few years ago	43%	**38%**
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%	**30%**
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%	**25%**

Base: Active leisure travelers (n=3,299); 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=2,022)

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

Boomers Expect to Spend the Most on Leisure Travel During the Next 12 Months, While Gen Zers, Millennials and Boomers Plan to Take the Highest Average Number of Trips During That Time.



Base: Active leisure travelers (Gen Zers: n=379; Millennials: n=933; Gen Xers: n=816; Boomers: n=1,057)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

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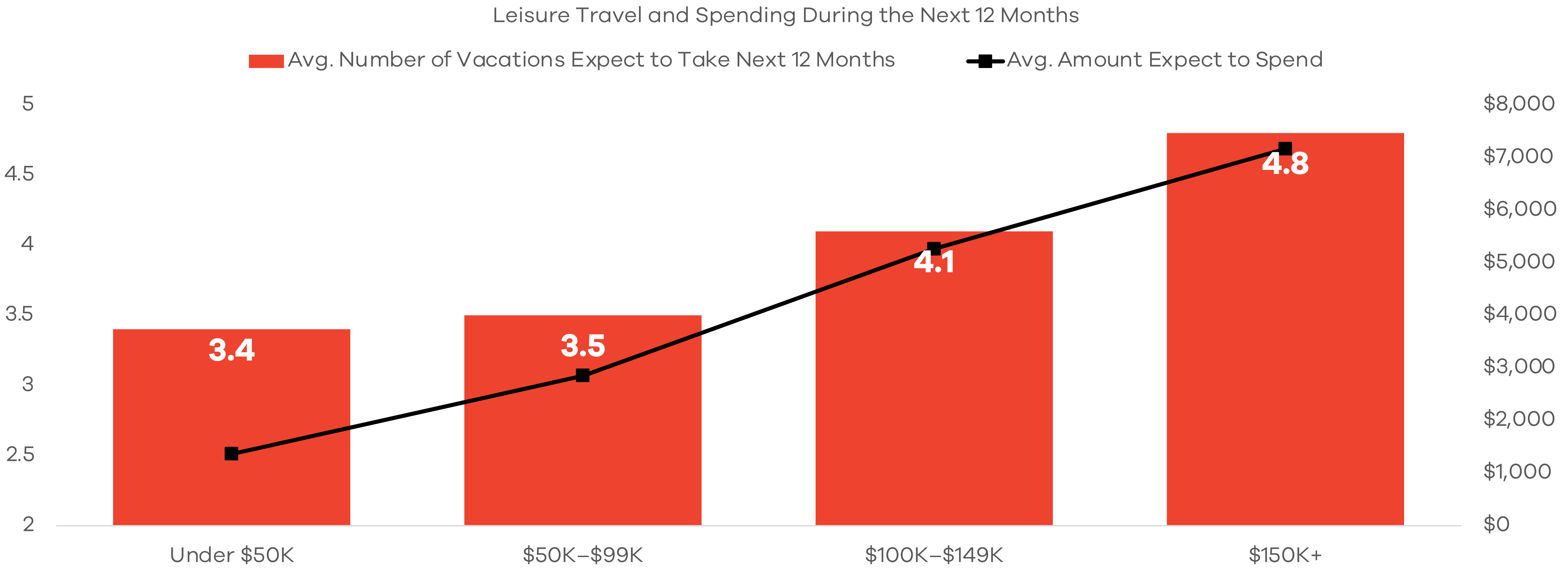
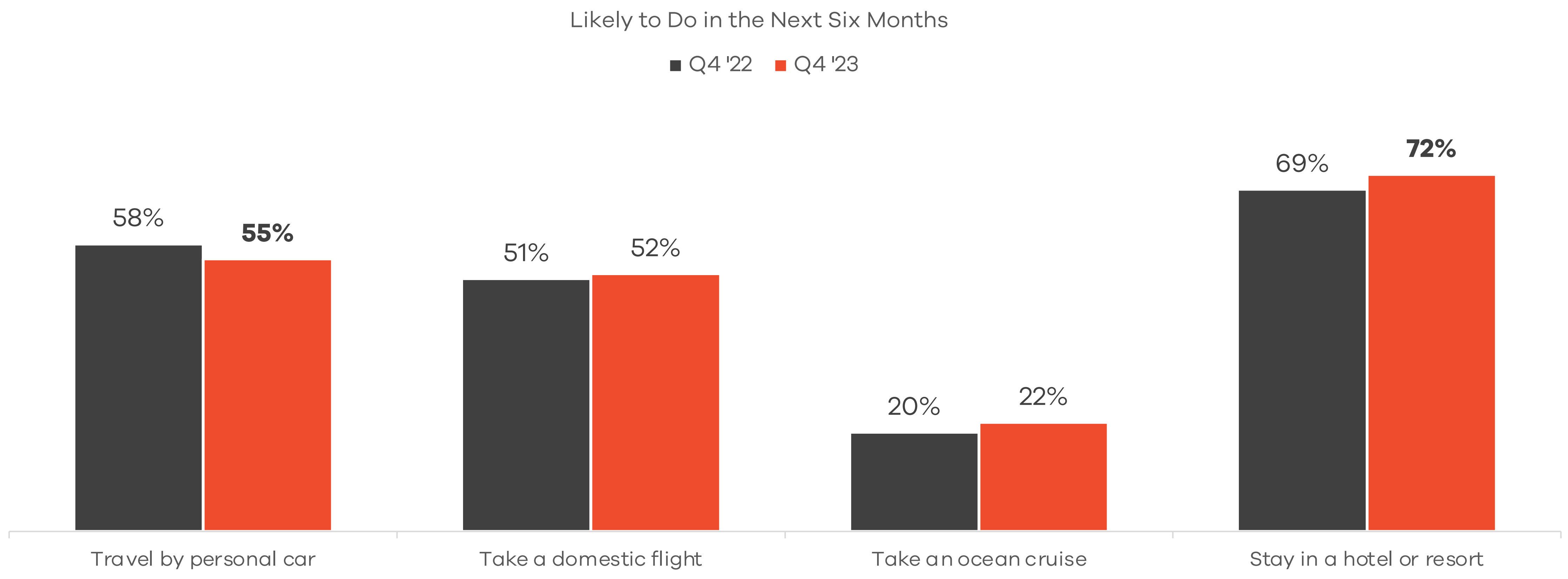
Travel Intentions and Spending Intentions Continue to Increase With Household Income.



Base: Active leisure travelers (Under $50K: n=643; $50K–$99K: n=960; $100K–$149K: n=722; $150K+: n=974)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

Likelihood to Stay in a Hotel or Resort Increased From Last Year, While Likelihood to Travel by Personal Car Decreased.



Data in bold indicates a statistically significant difference from Q4 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®* "Winter Edition"

Where People Want to Visit

MMGY Travel Intelligence

States Interested in Visiting During the Next Two Years

Rank	Destination	% Interested
1	Hawaii	66%
2	Florida	65% ▲
3	Colorado	59% ▲
4	California	56%
5	Alaska	53%
6	New York	49% ▼
7	Texas	48%
8	Nevada	47%
8	Arizona	47% ▲
10	Tennessee	41%
10	Georgia	41%
12	North Carolina	40%
13	South Carolina	38%
14	Washington	37% ▼
14	Maine	37%
14	Montana	37%
14	Louisiana	37% ▲
18	Massachusetts	34%
19	Oregon	33%
20	New Mexico	32%

Rank	Destination	% Interested
20	Wyoming	32%
22	Virginia	31% ▼
23	Pennsylvania	30%
23	Vermont	30%
25	Michigan	29%
26	Utah	28% ▼
26	New Jersey	28%
28	New Hampshire	27%
28	Connecticut	27%
30	Maryland	26%
30	Rhode Island	26%
32	Kentucky	25%
33	West Virginia	24%
33	Wisconsin	24%
33	South Dakota	24%
33	Illinois	24%
33	Alabama	24%
38	Idaho	23%
39	Minnesota	22%
39	North Dakota	22%

Rank	Destination	% Interested
41	Missouri	21%
41	Delaware	21%
41	Ohio	21%
41	Mississippi	21%
41	Oklahoma	21%
41	Nebraska	21%
47	Arkansas	19%
48	Kansas	18%
49	Indiana	17% ▼
50	Iowa	16%

▲ Displayed a statistically significant increase compared to Q4 2022

▼ Displayed a statistically significant decrease compared to Q4 2022

Base: Active leisure travelers (n=3,299)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

Destinations Interested in Visiting During the Next Two Years

Rank	Destination	% Interested
1	Island of Hawai'i	57% ▼
1	Maui, HI	57%
3	Las Vegas, NV	56%
3	Florida Keys/Key West, FL	56%
5	Honolulu, HI	55% ▼
6	Kaua'i, HI	54%
7	Orlando, FL	50%
8	Miami, FL	48%
8	Tampa/St. Petersburg/ Clearwater, FL*	48%
10	New York City, NY	47% ▼
10	New Orleans, LA	47%
10	Lanai, HI*	47%
13	Nashville, TN	46%
13	Palm Beach, FL	46%
15	Niagara Falls, NY	45%
16	San Diego, CA	44% ▼
16	Denver, CO	44%
18	San Francisco, CA	43% ▼
18	Fort Lauderdale, FL	43%
20	Los Angeles, CA	42%
21	Myrtle Beach, SC	41%
21	Napa Valley, CA	41%
21	Daytona Beach, FL	41%

Rank	Destination	% Interested
21	Panama City Beach, FL	41%
25	Washington, D.C.	40% ▼
25	Fort Myers/Sanibel/Captiva, FL	40% ▲
25	Palm Springs, CA	40%
25	Charleston, SC	40%
25	Phoenix/Scottsdale, AZ	40%
30	Aspen, CO*	39%
30	Austin, TX	39%
32	Boston, MA	38%
32	St. Augustine, FL	38%
32	Seattle, WA	38%
32	Dallas, TX	38%
36	Hilton Head Island, SC	37%
36	Sedona, AZ*	37%
36	San Antonio, TX	37%
36	Houston, TX	37% ▲
40	Outer Banks, NC	36% ▼
41	Charlotte, NC	35%
41	Atlanta, GA	35%
43	Virginia Beach, VA	34%
43	Sonoma County, CA	34%
45	Gatlinburg/Pigeon Forge, TN	33%
45	Chicago, IL	33%

Rank	Destination	% Interested
47	Anaheim, CA	32%
47	Santa Fe, NM*	32%
47	Asheville, NC	32%
50	Portland, OR	31%
50	Vail, CO	31%
50	Jackson Hole, WY*	31%
53	Philadelphia, PA	30%
53	San Jose, CA*	30%
53	Salt Lake City, UT	30%
53	Raleigh/Durham, NC	30%
57	Greenville, SC*	29%
57	Corpus Christi, TX	29%
59	Winston-Salem, NC	26%
59	Wilmington, NC	26%
59	Branson, MO	26%
59	Park City, UT*	26%
63	Shreveport, LA*	25%
64	St. Louis, MO	24%
65	Minneapolis, MN	23%
65	Kansas City, MO	23%
67	Ann Arbor, MI	22%
67	Detroit, MI	22%
69	Cleveland, OH	21%

*Destination was not asked in 2022, so year-over-year comparison is not noted.

Base: Active leisure travelers (n=3,299)

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

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
1	New York City, NY
3	Las Vegas, NV
4	Los Angeles, CA
5	Florida Keys/Key West, FL
6	Maui, HI
7	Orlando, FL
7	Niagara Falls, NY
7	Denver, CO
7	San Francisco, CA

Millennials	
1	Island of Hawai'i
1	Las Vegas, NV
1	Maui, HI
1	Miami, FL
5	Florida Keys/Key West, FL
5	Honolulu, HI
7	Kaua'i, HI
8	Orlando, FL
8	Palm Beach, FL
10	New York City, NY

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

Boomers	
1	Florida Keys/Key West, FL
2	Honolulu, HI
3	Maui, HI
4	Island of Hawai'i
5	Kaua'i, HI
6	Las Vegas, NV
7	Nashville, TN
8	Lanai, HI
9	Fort Myers/Sanibel/Captiva, FL
10	Orlando, FL

Base: Active leisure travelers (Gen Zers: n=379; Millennials: n=933; Gen Xers: n=816; Boomers: n=1,057)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Winter Edition"

Winter Module

Online Travel Agencies

MMGY Travel Intelligence

Online Travel Agency Usage

75% 2022 **76%** 2023

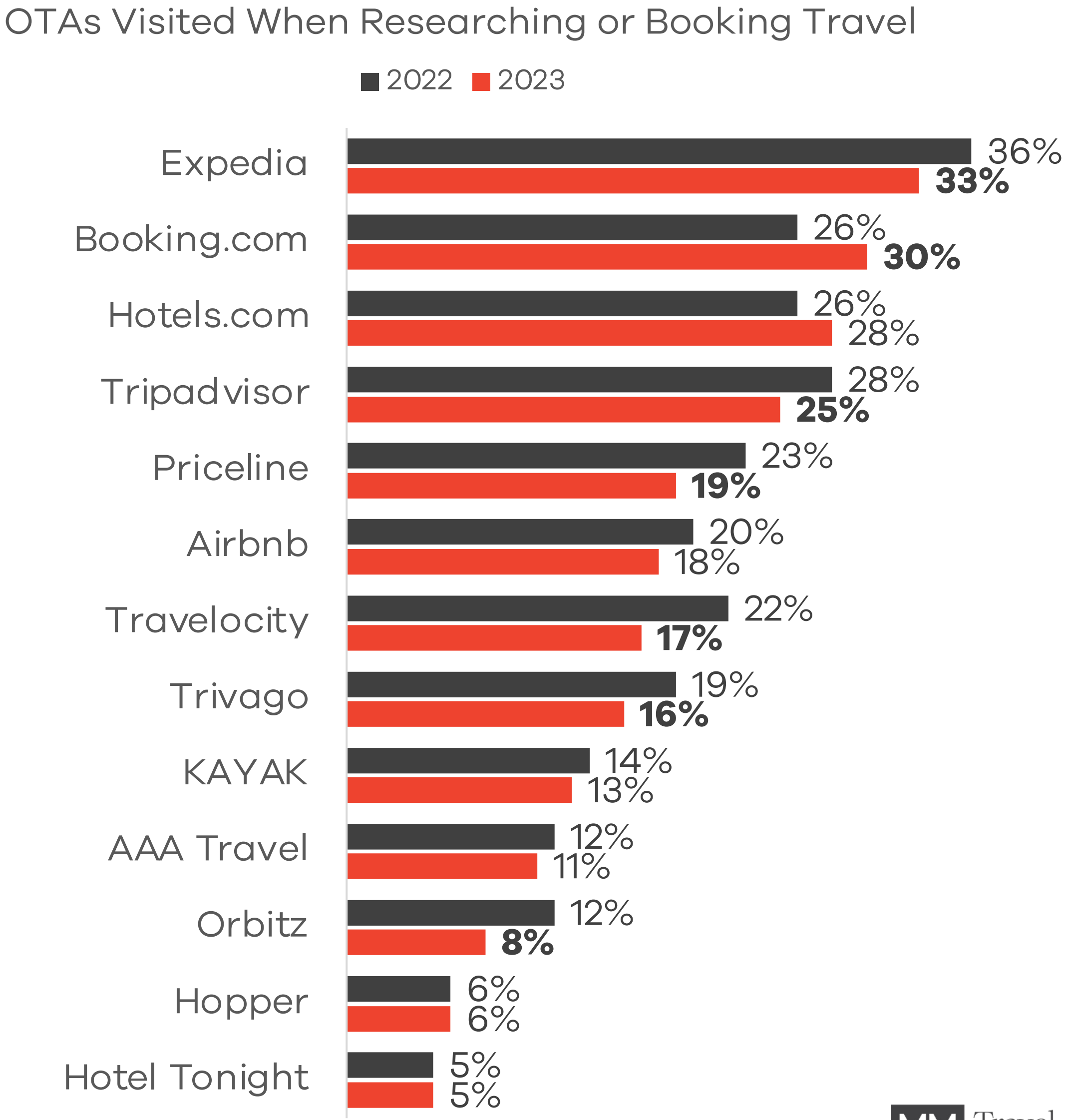
of active leisure travelers visit at least one OTA website or app on a regular basis when researching or booking travel.

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

Gen Zers: **87%**
Millennials: **84%**
Gen Xers: **81%**
Boomers: 64%

Have Kids: **87%**
Don't Have Kids: 70%

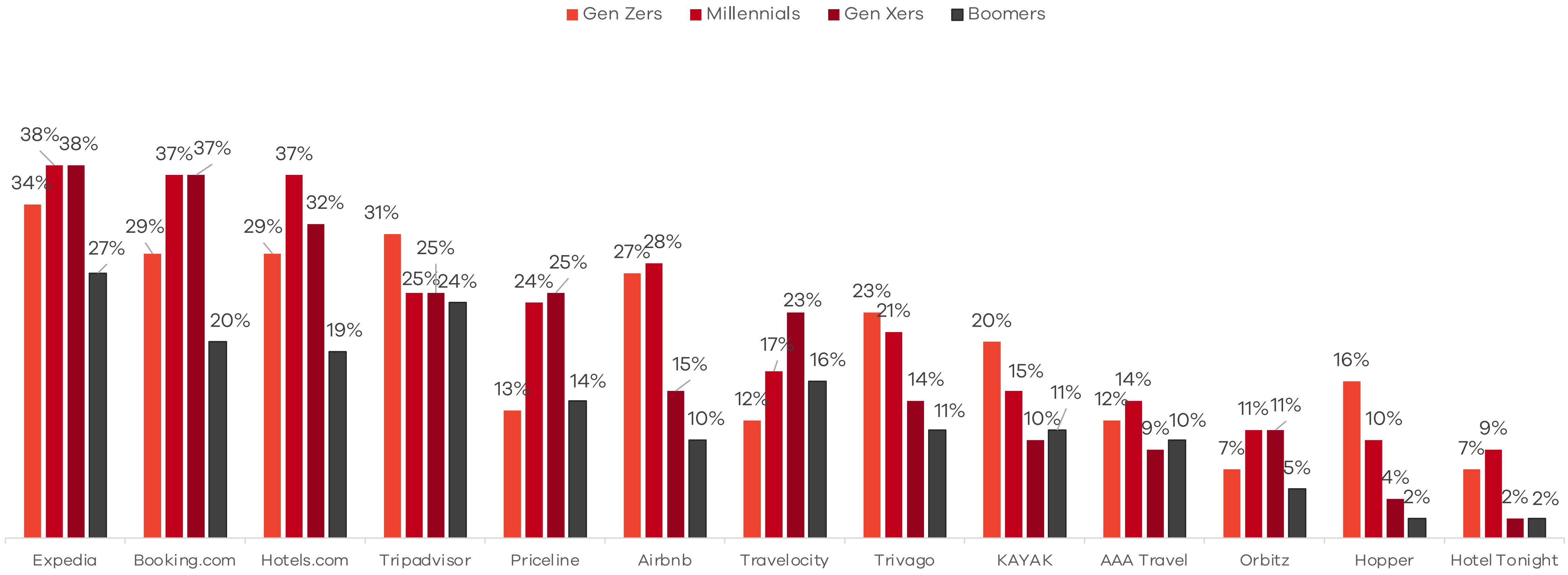
Less Than $100K: 76%
$100K or more: 75%



Data in bold indicates a statistically significant difference from 2022.
Base: Active leisure travelers (n=3,299)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Winter Edition"

Online Travel Agency Usage by Generation

/ Younger generations are much more likely than older generations to use Tripadvisor, Airbnb, Trivago, KAYAK and Hopper.



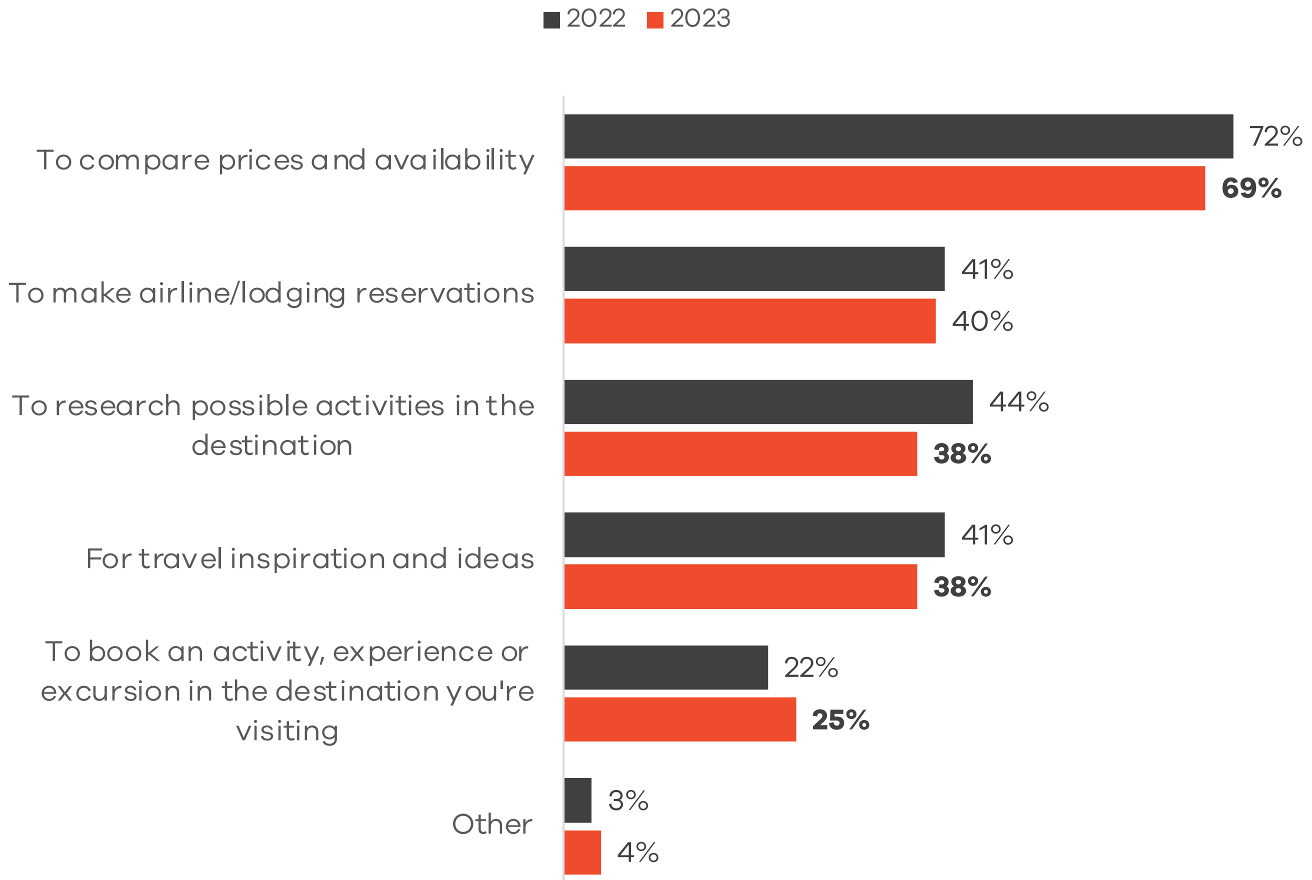
Base: Active leisure travelers (Gen Zers: n=379; Millennials: n=933; Gen Xers: n=816; Boomers: n=1,057)

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

MMGY Travel Intelligence

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

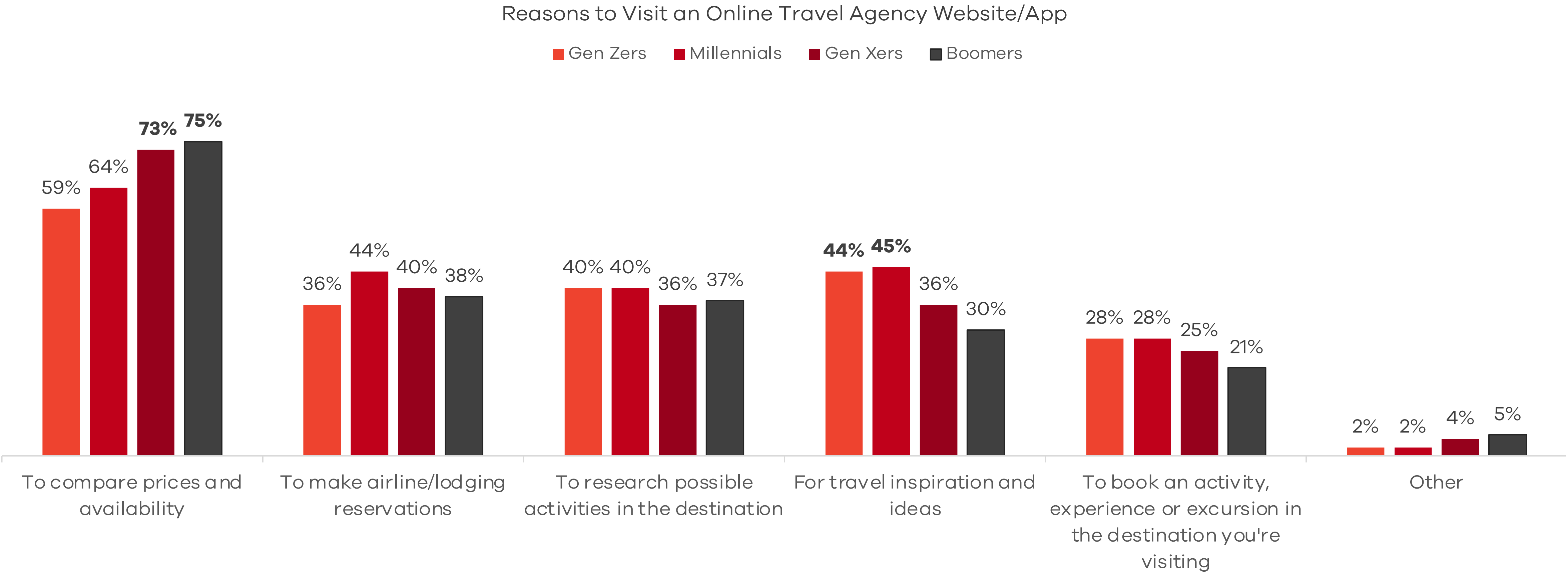
Reasons to Visit an Online Travel Agency Website/App



Data in bold indicates a statistically significant difference from 2022.
Base: Active leisure travelers who use OTAs (n=2,492)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Winter Edition"

MMGY Travel Intelligence

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

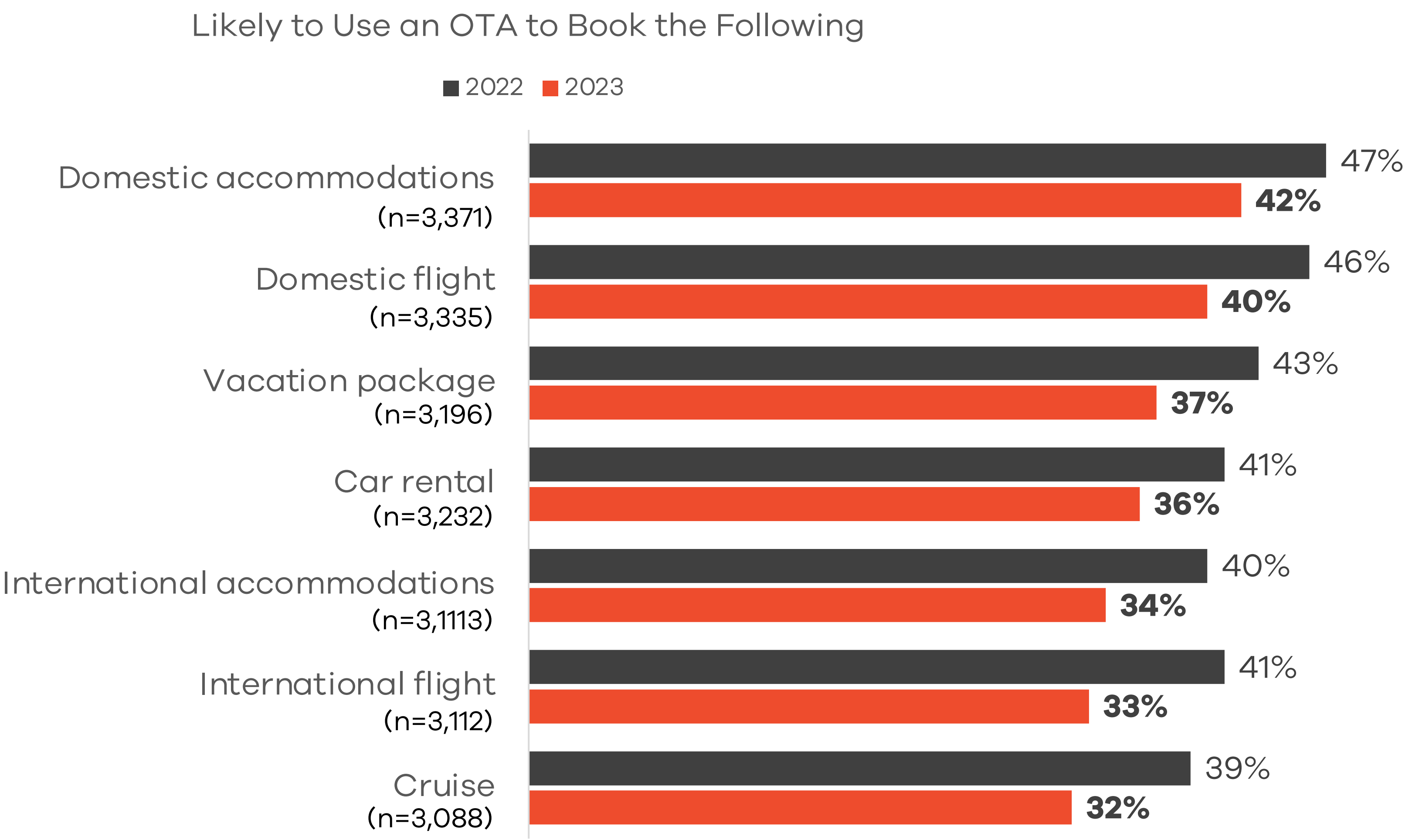


Data in bold indicates a statistically significant difference from other generational groups.

Base: Active leisure travelers who use OTAs (Gen Zers: n=330; Millennials: n=785; Gen Xers: n=658; Boomers: n=675)

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

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



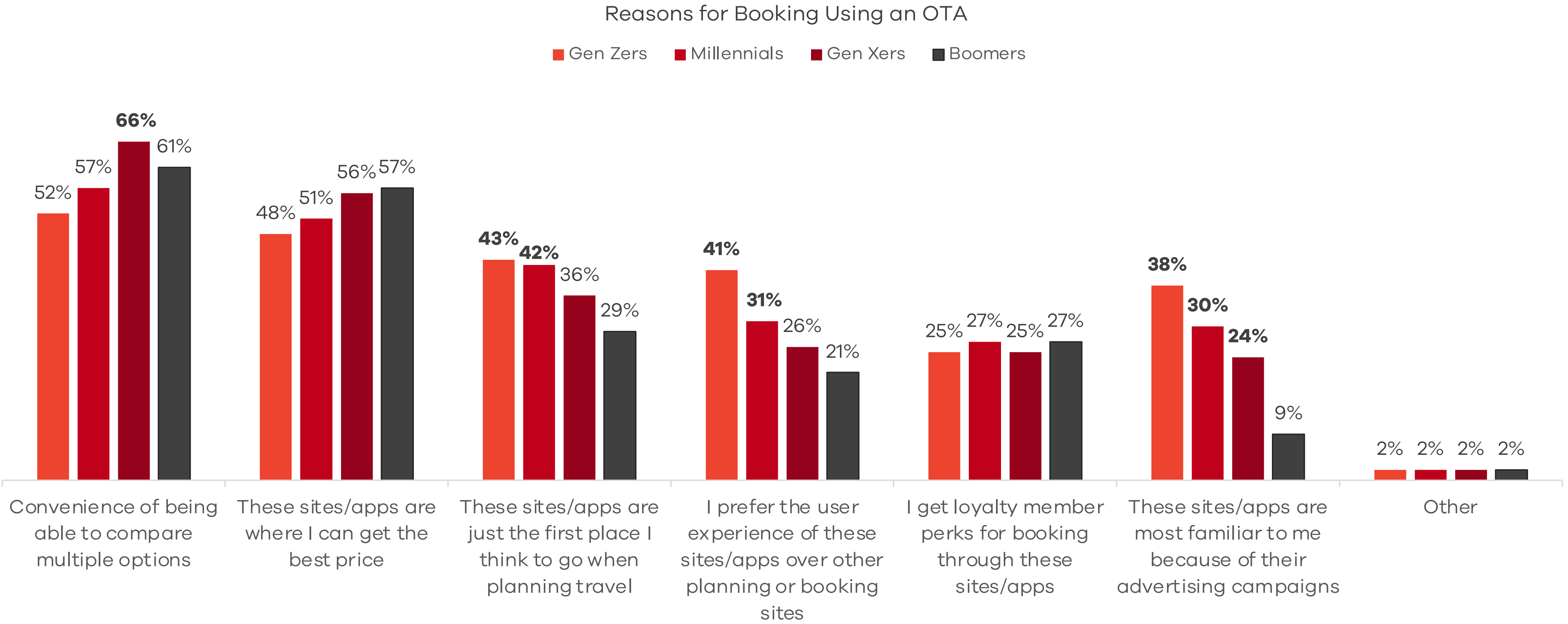
Data in bold indicates a statistically significant difference from 2022.
Base: Active leisure travelers planning to book each type of travel
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

Reasons for Booking Using an OTA

	Oct ‘22	Oct ‘23
Convenience of being able to compare multiple options	61%	60%
These sites/apps are where I can get the best price	50%	53%
These sites/apps are just the first place I think to go when planning travel	38%	37%
I prefer the user experience of these sites/apps over other planning or booking sites	28%	28%
I get loyalty member perks for booking through these sites/apps	25%	26%
These sites/apps are most familiar to me because of their advertising campaigns	22%	24%
Other	3%	2%

Base: Active leisure travelers who are likely to book using an OTA (n=1,915)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Winter Edition"

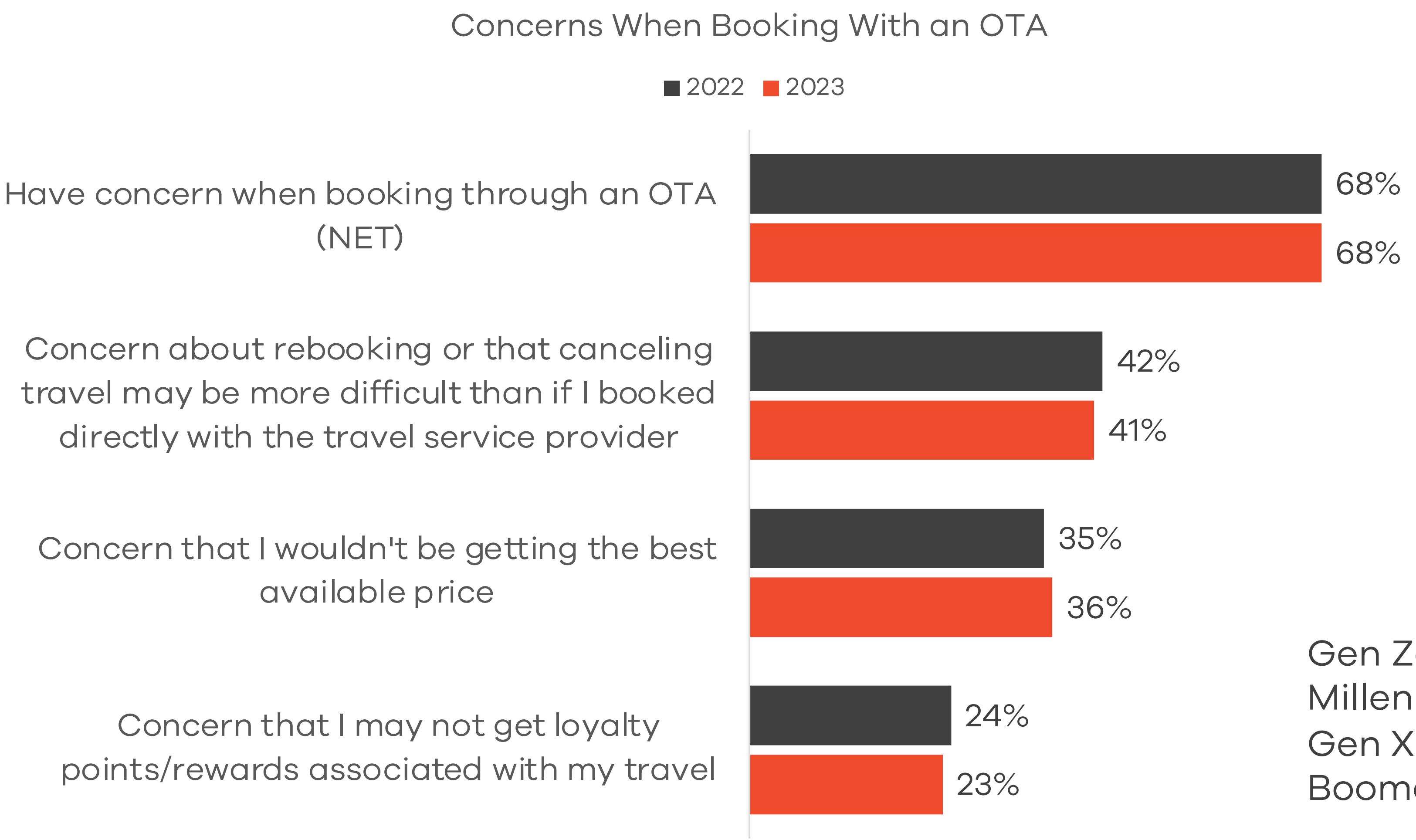
Respondents Using OTAs for Convenience and Because They Believe That Is Where They'll Get the Best Prices Increases With Age.



Data in bold indicates a statistically significant difference from other generational groups.
Base: Active leisure travelers who are likely to book using an OTA (Gen Zers: n=249; Millennials: n=647; Gen Xers: n=523; Boomers: n=460)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Winter Edition"

MMGY Travel Intelligence

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



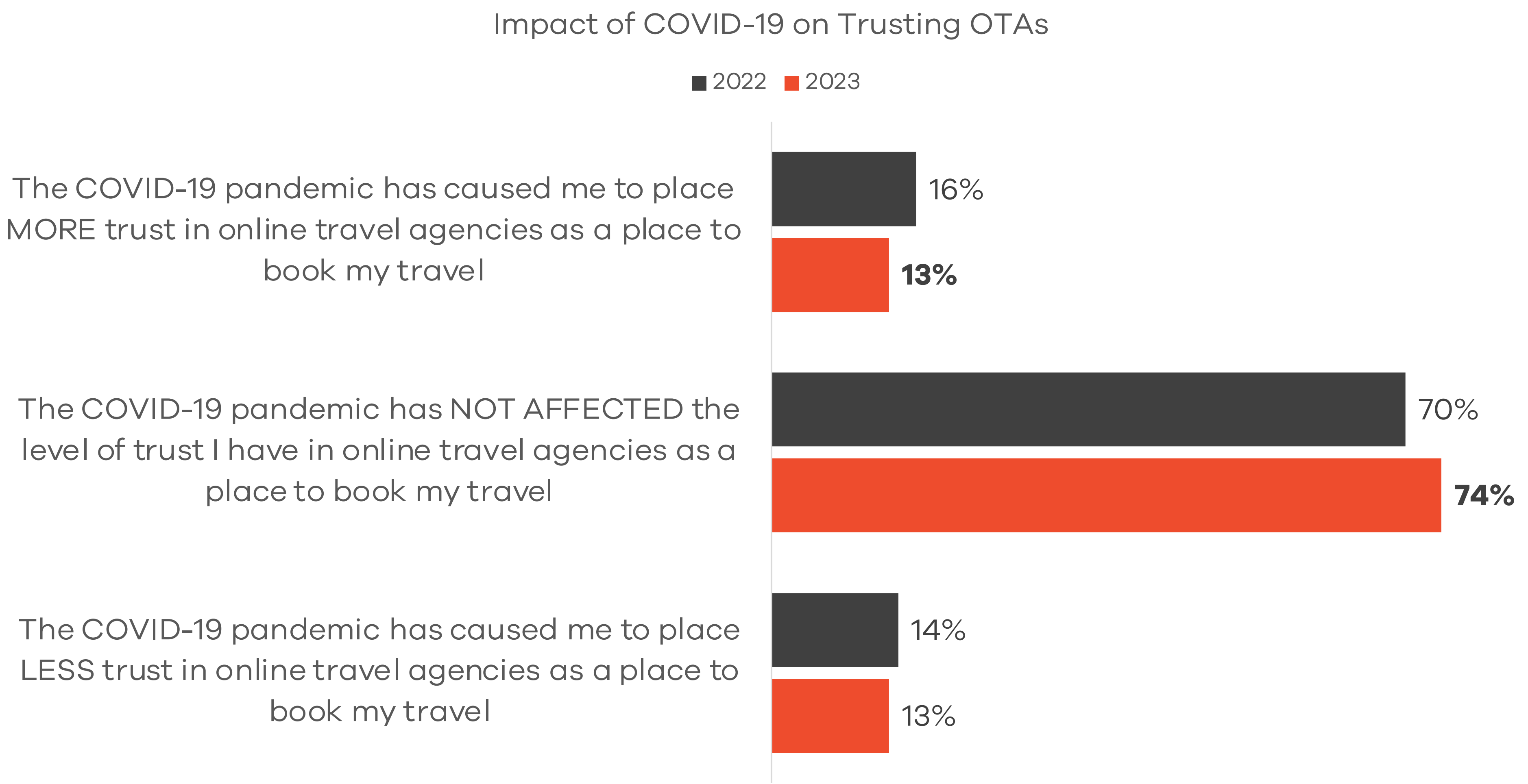
- Compared to last year, a similar percentage of travelers have concerns when booking through an OTA.
- Younger generations are significantly more likely than older generations to have concerns when booking through an OTA. Despite this, younger generations are still turning to OTAs for research and booking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

Gen Zers: **77%**
Millennials: **75%**
Gen Xers: **67%**
Boomers: 59%

Base: Active leisure travelers (n=3,299)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

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



Data in bold indicates a statistically significant difference from 2022.
Base: Active leisure travelers (n=3,299)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Winter Edition"


Winter Module
LOYALTYCARD
1234 5678 9012 3456
Brand Loyalty
MMGY Travel Intelligence

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

Hotels Would Consider Booking Within Next Two Years	Oct '23
Marriott	49%
Hilton	47%
Holiday Inn	40%
Hilton Garden Inn	31%
Hampton	31%
Comfort Inn	30%
Hyatt	29%
Best Western	29%
Wyndham	26%
Doubletree	23%
Sheraton	21%
Fairfield Inn	17%
Radisson	16%
Four Seasons	15%
Disney Hotels and Resorts	14%
Ritz Carlton	13%
Red Lion Hotels	7%
Gaylord Hotels	6%

Question was changed to ask about consideration in next two years, so comparisons to 2022 cannot be made.
Base: Active leisure travelers (n=3,299)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

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

Airlines Would Consider Booking Within Next Two Years	Oct '23
American Airlines	52%
Delta	50%
Southwest	47%
United	46%
JetBlue	23%
Alaska Airlines	17%
Frontier Airlines	14%
Spirit Airlines	13%
British Airways	12%
Air Canada	10%
Virgin Atlantic	9%
Lufthansa	8%

Question was changed to ask about consideration in next two years, so comparisons to 2022 cannot be made.
Base: Active leisure travelers (n=3,299)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Winter Edition"

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

43%

a Hotel Brand
(compared to 44% in 2022)

44%

an Airline
(compared to 45% in 2022)

27%

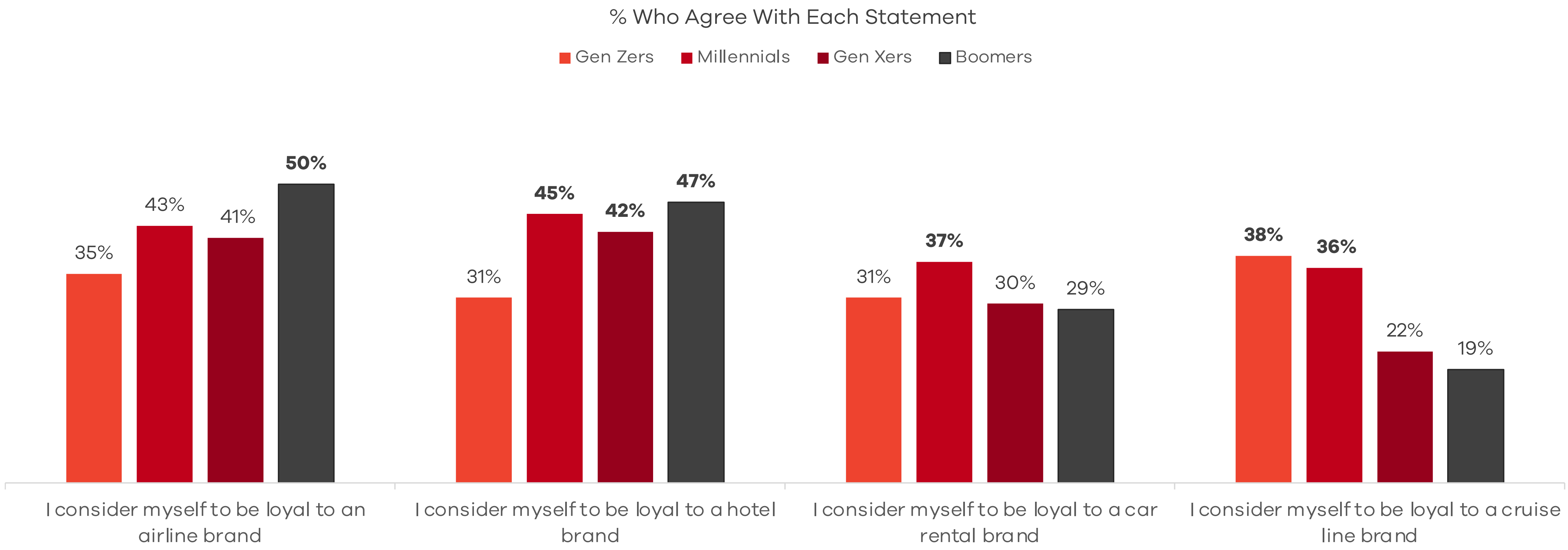
a Cruise Line
(compared to 30% in 2022)

32%

a Car Rental Brand
(compared to 31% in 2022)

Base: Active leisure travelers (n=3,299)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Winter Edition"

Millennials Display the Most Loyalty to Nearly All Travel Categories.



Data in bold indicates a statistically significant difference from other generational groups.
Base: Active leisure travelers (Gen Zers: n=379; Millennials: n=933; Gen Xers: n=816; Boomers: n=1,057)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Winter Edition"

Hotel Loyalty Programs

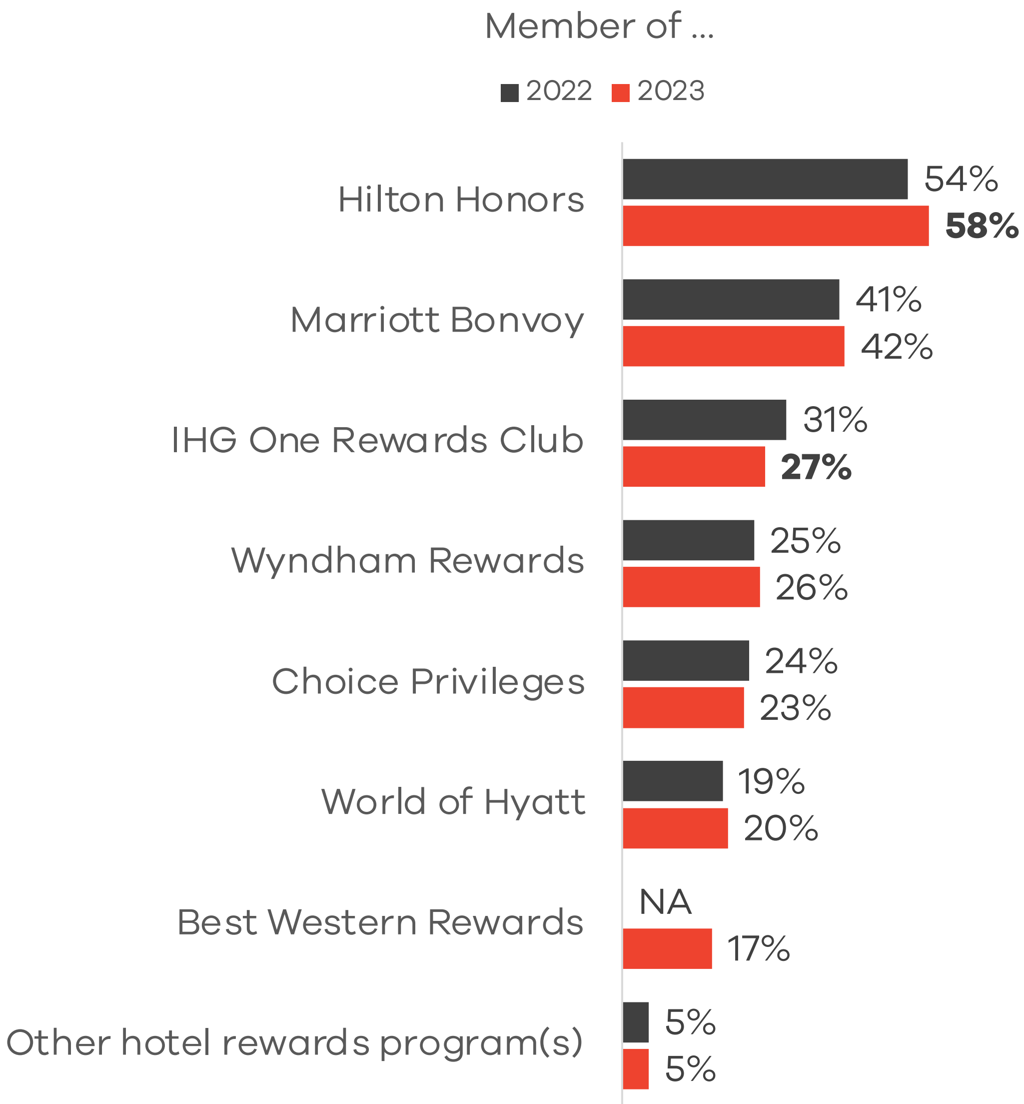
51% 2022 **51%** 2023

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

Gen Zers: 39%
Millennials: 46%
Gen Xers: 47%
Boomers: **62%**

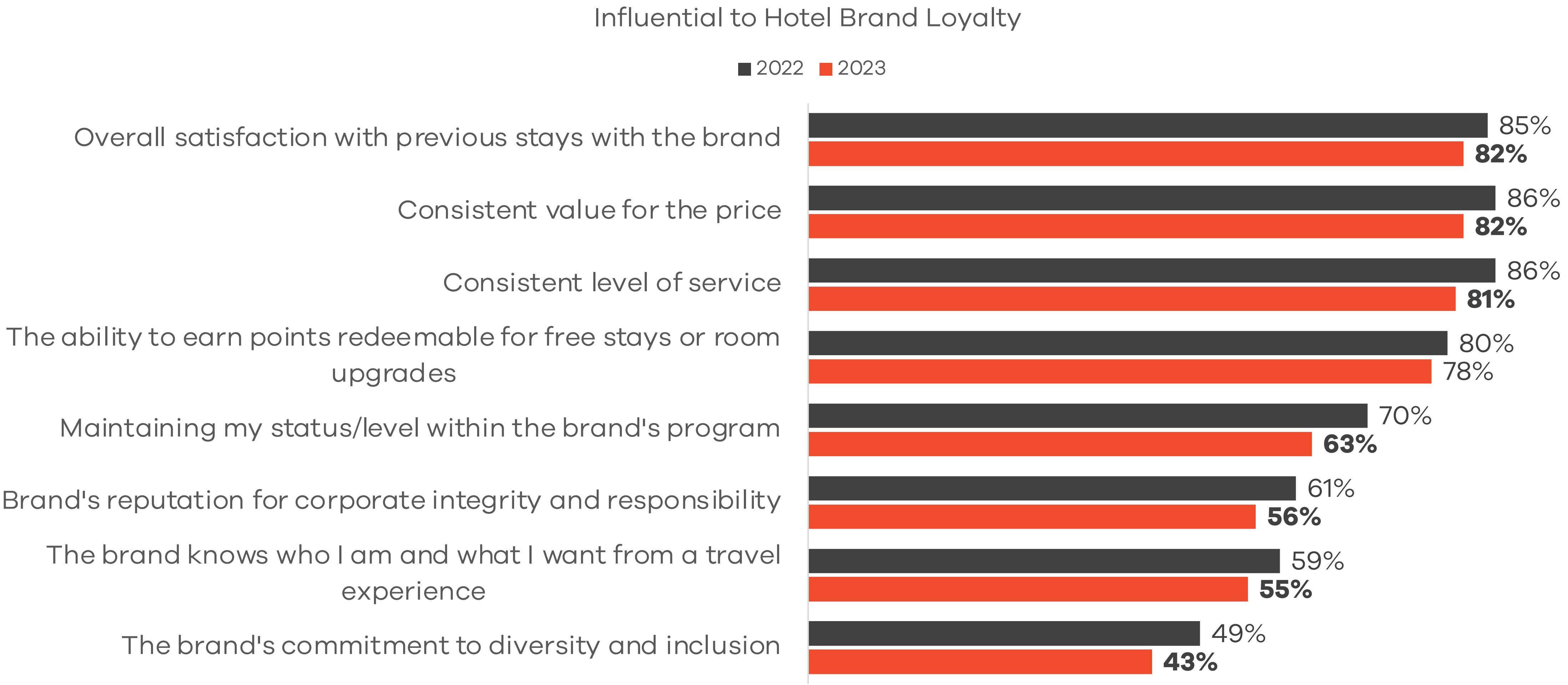
Have Kids: 53%
Don't Have Kids: 51%

Less Than $100K: 41%
$100K or more: **61%**



Data in bold indicates a statistically significant difference from 2022.
Base: Active leisure travelers (n=3,299); members of a hotel loyalty program (n=1,692)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Winter Edition"

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



Data in bold indicates a statistically significant difference from 2022.
Base: Members of a hotel loyalty program (n=1,692)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Airline Frequent Flyer Programs

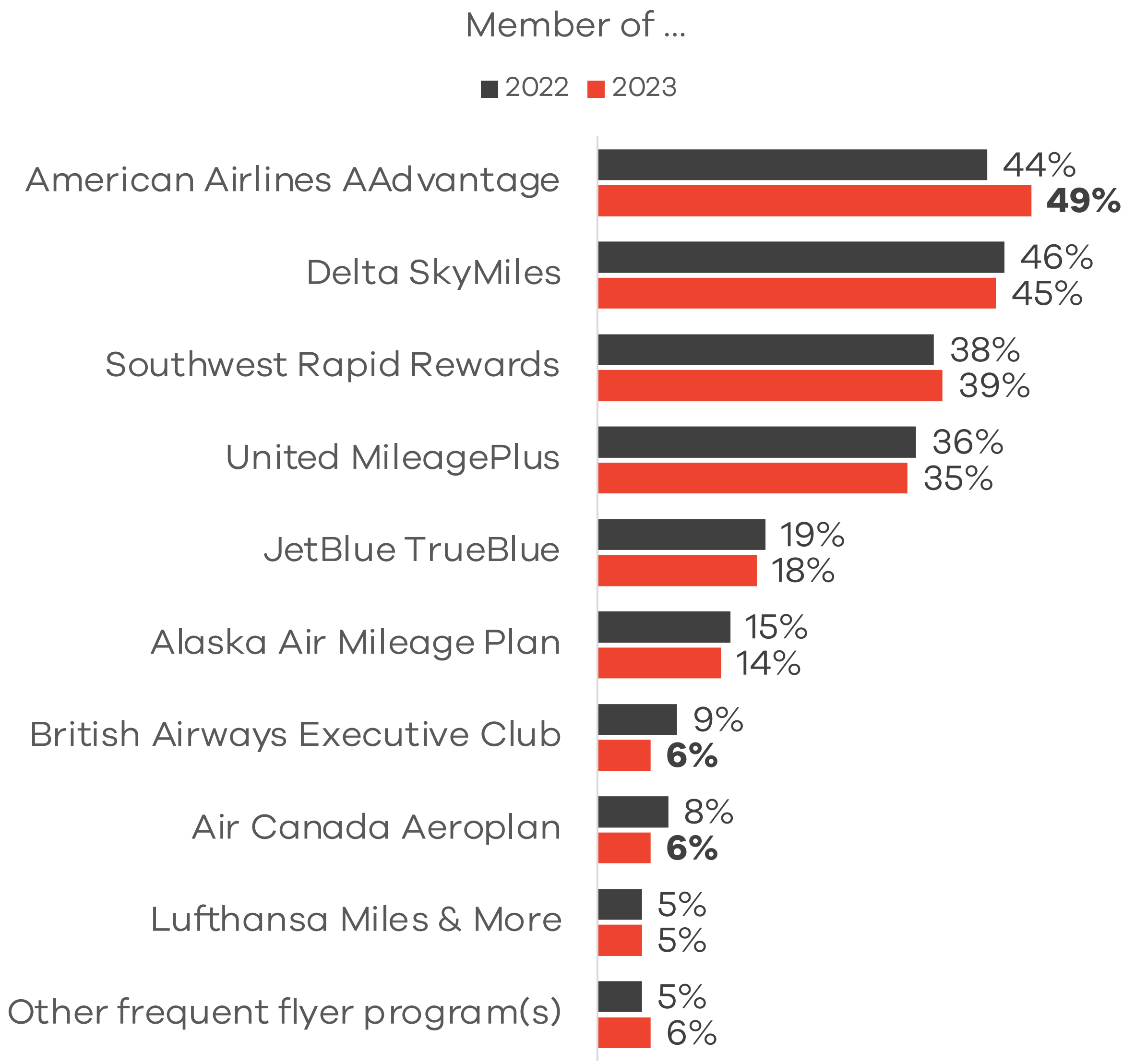
48% 2022 **47%** 2023

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

Gen Zers: 42%
Millennials: 38%
Gen Xers: 41%
Boomers: **60%**

Have Kids: 42%
Don't Have Kids: **49%**

Less Than $100K: 32%
$100K or more: **61%**



Data in bold indicates a statistically significant difference from 2022.
Base: Active leisure travelers (n=3,299); members of a frequent flyer program (n=1,553)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Winter Edition"

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

Data in bold indicates a statistically significant difference from 2022.
Base: Members of a frequent flyer program (n=1,553)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"


Winter Module
Social Media Habits
MMGY Travel Intelligence

The Majority of Active Leisure Travelers Have a Page or Profile on Social Media, Including Nearly All All Gen Z and Millennial Travelers.

83% 2022

85% 2023

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

Gen Zers: **99%**
Millennials: **97%**
Gen Xers: 88%
Boomers: 71%

Have Kids: **96%**
Don't Have Kids: 80%

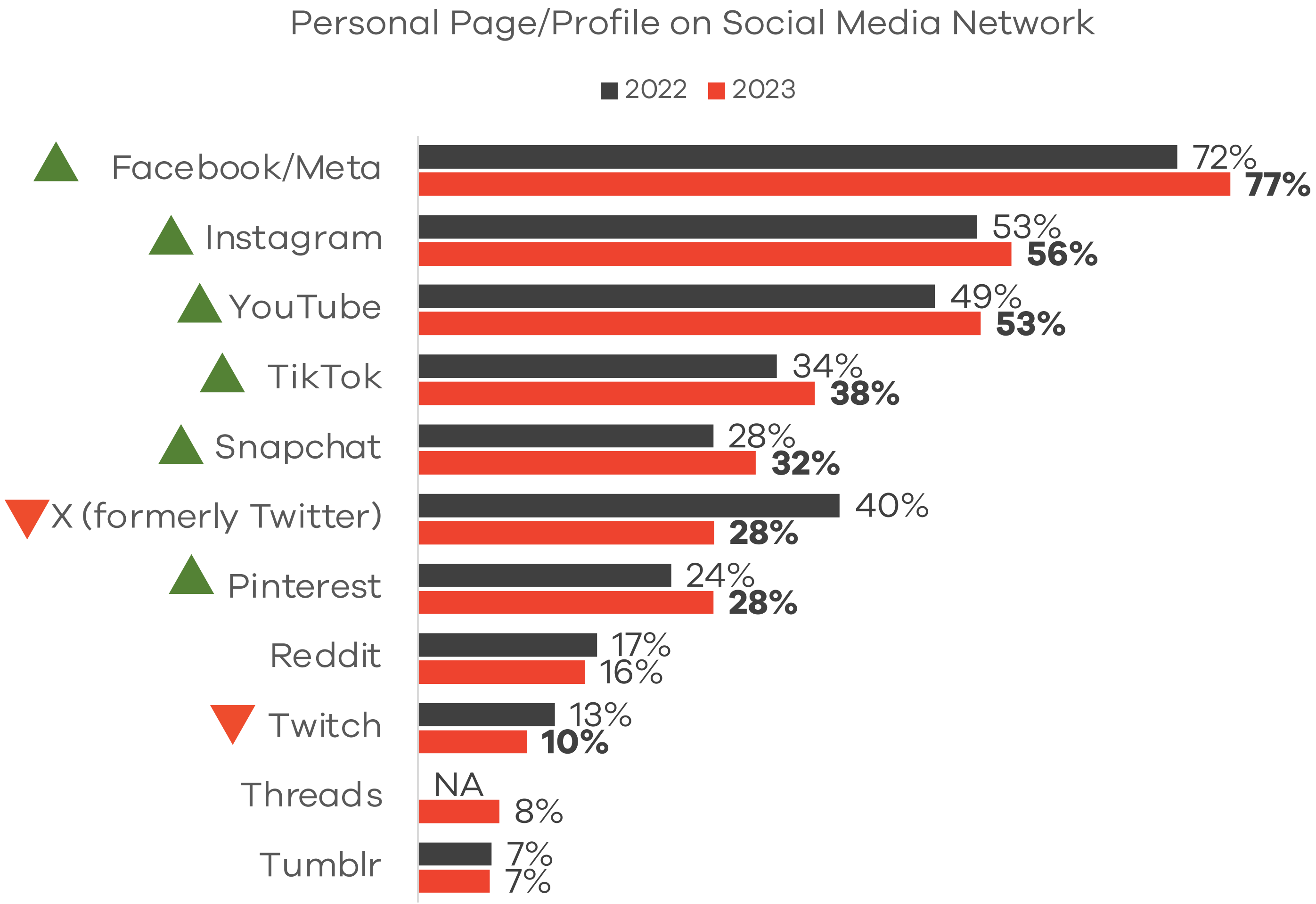
Less than $100K: **91%**
$100K or more: 80%

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

Base: Active leisure travelers (n=3,299)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

While Many of the Most Popular Social Media Sites Saw Increases in Usage From Last Year, X (Formerly Twitter) Saw a Significant Decrease.



Spend Most Time On ...	%
Facebook/Meta	45%
YouTube	17%
Instagram	14%
TikTok	11%
X (formerly Twitter)	5%
Snapchat	2%
Pinterest	2%
Reddit	2%
Twitch	1%
Threads	0%
Tumblr	0%

Base: Active leisure travelers who have a page/profile on social media (n=2,818)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

Most Popular Social Media Networks by Generation

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

Personal Page/Profile on Social Media Network	Gen Zers	Millennials	Gen Xers	Boomers
Facebook/Meta	46%	**77%**	**82%**	**86%**
Instagram	**75%**	**72%**	**59%**	29%
YouTube	**74%**	**68%**	**52%**	29%
TikTok	**59%**	**56%**	33%	11%
Snapchat	**64%**	**47%**	22%	9%
X (formerly Twitter)	**35%**	**37%**	27%	17%
Pinterest	**33%**	**33%**	**32%**	17%
Reddit	**25%**	**26%**	12%	4%
Twitch	**16%**	**18%**	8%	1%
Threads	10%	13%	6%	2%
Tumblr	**15%**	11%	4%	1%

Base: Active leisure travelers who have a page/profile on social media (Gen Zers: n=375; Millennials: n=906; Gen Xers: n=721; Boomers: n=754)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Nearly Two-Thirds of Active Leisure Travelers Plan to Use At Least One Social Media Platform Less in the Upcoming Year.

64% **2023**

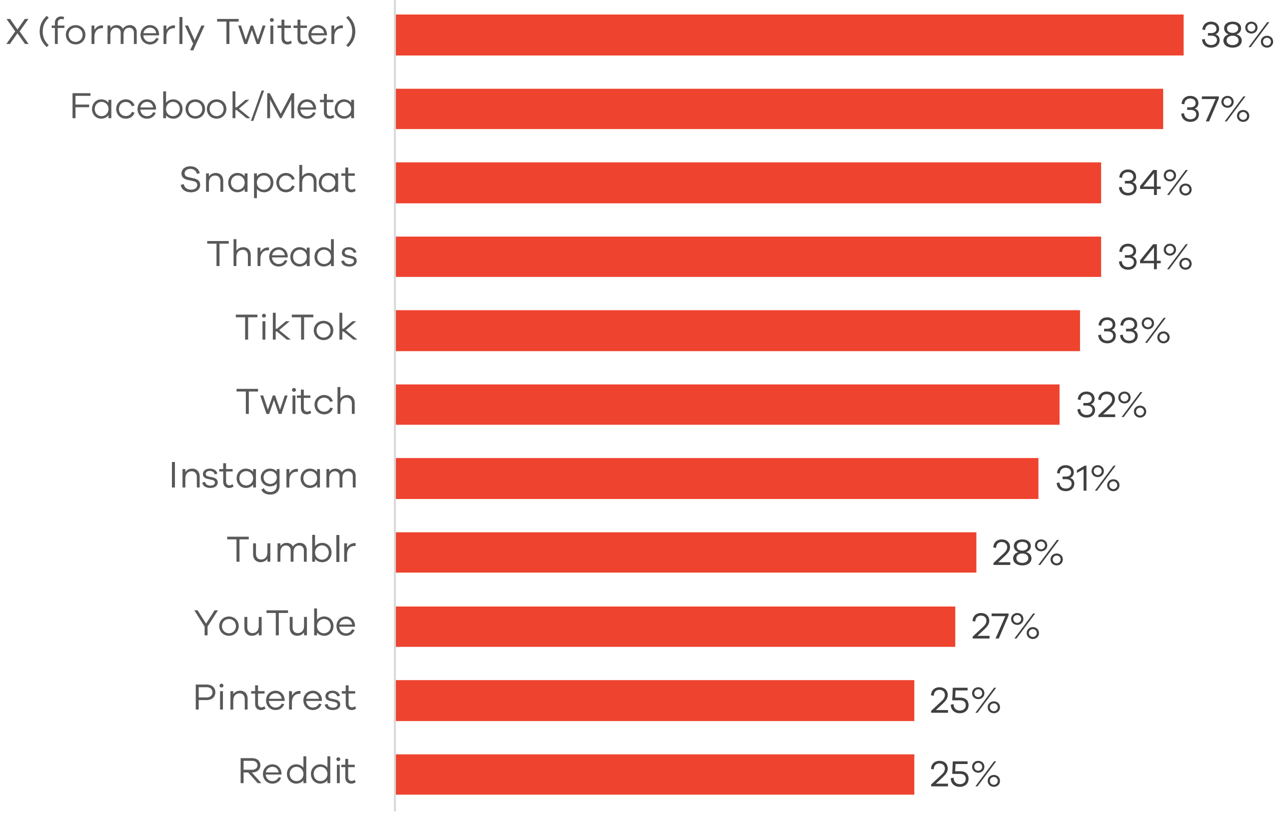
of active leisure travelers plan to use at least one of the social media sites they are currently using less in the upcoming year.

Gen Zers: **79%**
Millennials: **76%**
Gen Xers: 59%
Boomers: 48%

Have Kids: **73%**
Don't Have Kids: 59%

Less than $100K: 65%
$100K or more: 63%

Social Media Platform Using Less Over Next Year
(Among Those Currently Using Each)



Base: Active leisure travelers who have a page/profile on social media (n=2,818)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

One-Quarter of Active Leisure Travelers Who Do Not Currently Use YouTube or Facebook Plan to Do So in the Next Year.

48%
2023

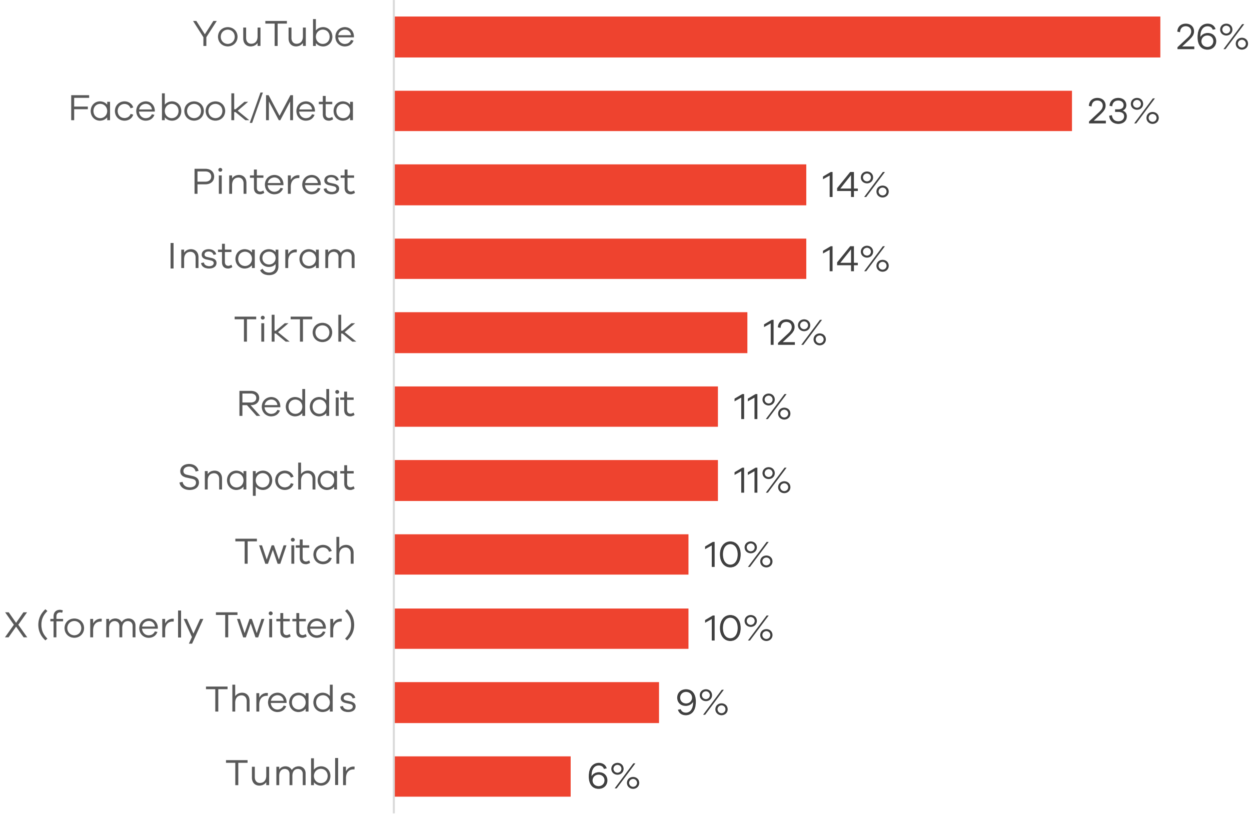
of active leisure travelers plan to use a social media platform over the next year that they are not currently using.

Gen Zers: **64%**
Millennials: **62%**
Gen Xers: 46%
Boomers: 27%

Have Kids: **63%**
Don't Have Kids: 40%

Less than $100K: 48%
$100K or more: 48%

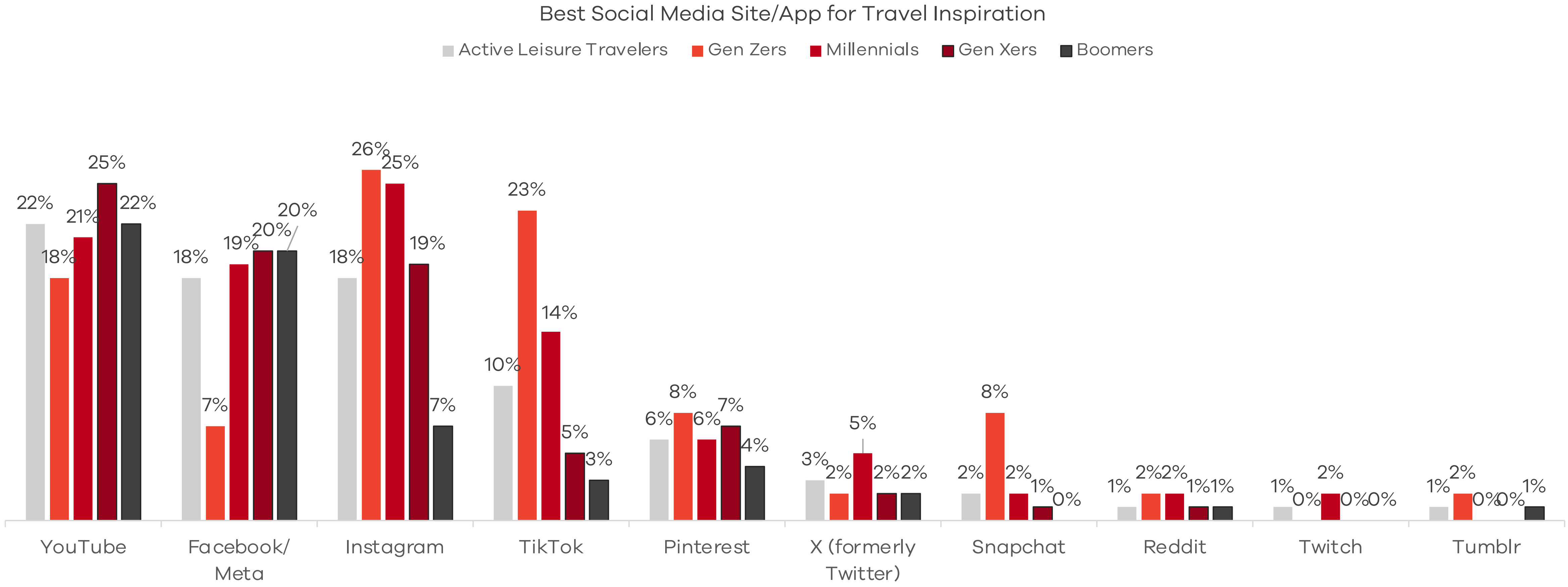
% Planning to Use Social Media Platform Over the Next Year
(Among Those Not Currently Using Each)



Base: Active leisure travelers who have a page/profile on social media (n=2,818)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Gen Zers and Millennials are Most Likely to Turn to Instagram for Travel Inspiration, While Gen Xers Are Most Likely to Turn to YouTube.



Base: Those who have a page/profile on social media (Active leisure travelers: n=2,818; Gen Zers: n=375; Millennials: n=906; Gen Xers: n=721; Boomers: n=754)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Nearly Half of Active Leisure Travelers Have Selected a Vacation Destination or Travel Service Provider Based at Least Partially on Social Media.

47% 2022

46% 2023

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

Gen Zers: **65%**
Millennials: **61%**
Gen Xers: 46%
Boomers: 23%

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

Less than $100K: 44%
$100K or more: 49%

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

Base: Active leisure travelers who have a page/profile on social media (n=2,818)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

Vacation Destinations on Social Media

35% 2022 32% 2023

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

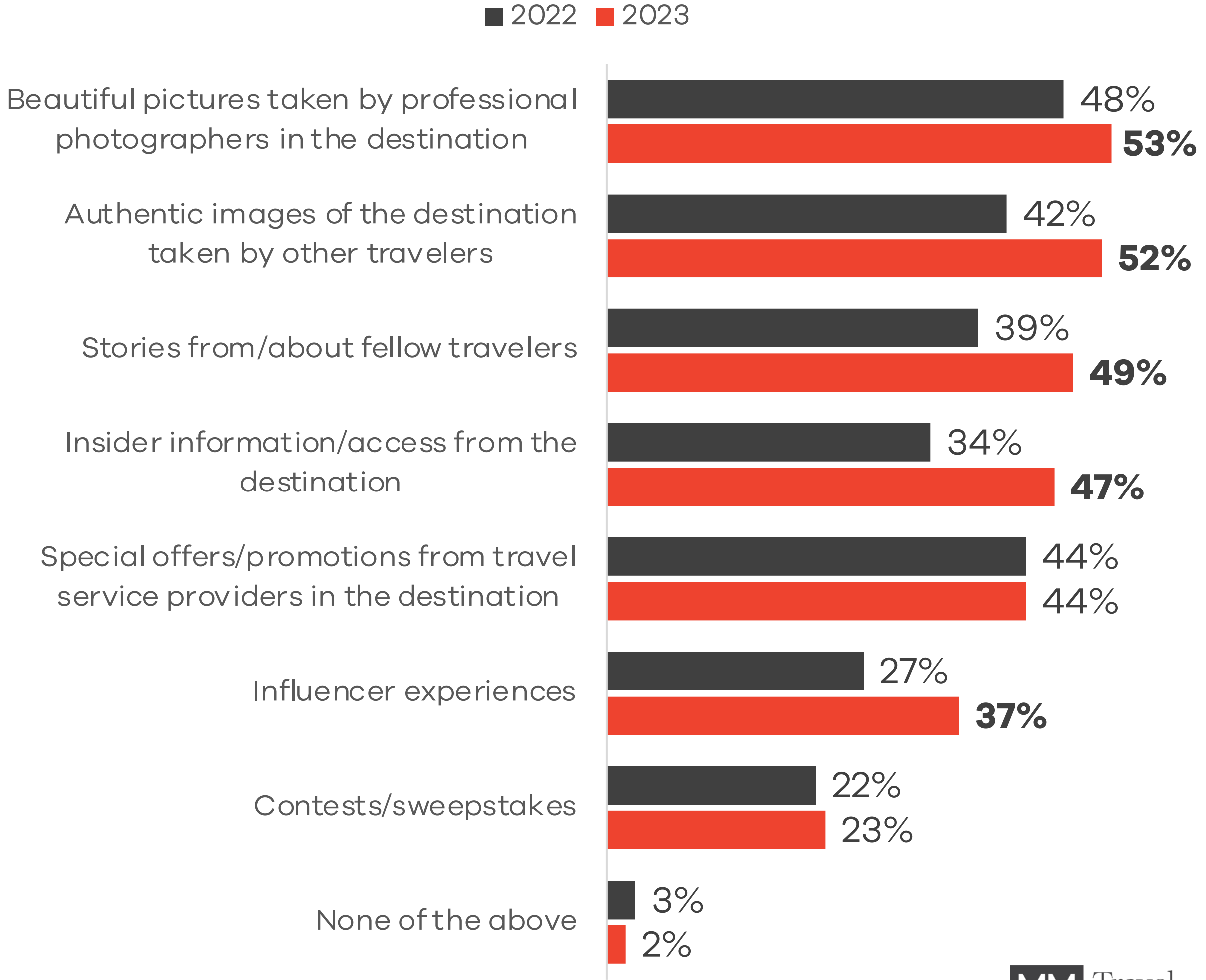
/ More younger travelers, travelers with higher incomes and travelers with kids follow a vacation destination on social media.

Gen Zers: **43%**
Millennials: **45%**
Gen Xers: 27%
Boomers: 16%

Have Kids: **46%**
Don't Have Kids: 24%

Less than $100K: 27%
$100K or more: **37%**

Valued Content on Social Media From Travel Destinations



Base: Active leisure travelers who have a page/profile on social media (n=2,818); those who follow a vacation destination on social media (n=893)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Travel Service Providers on Social Media

31% 2022 **28%** 2023

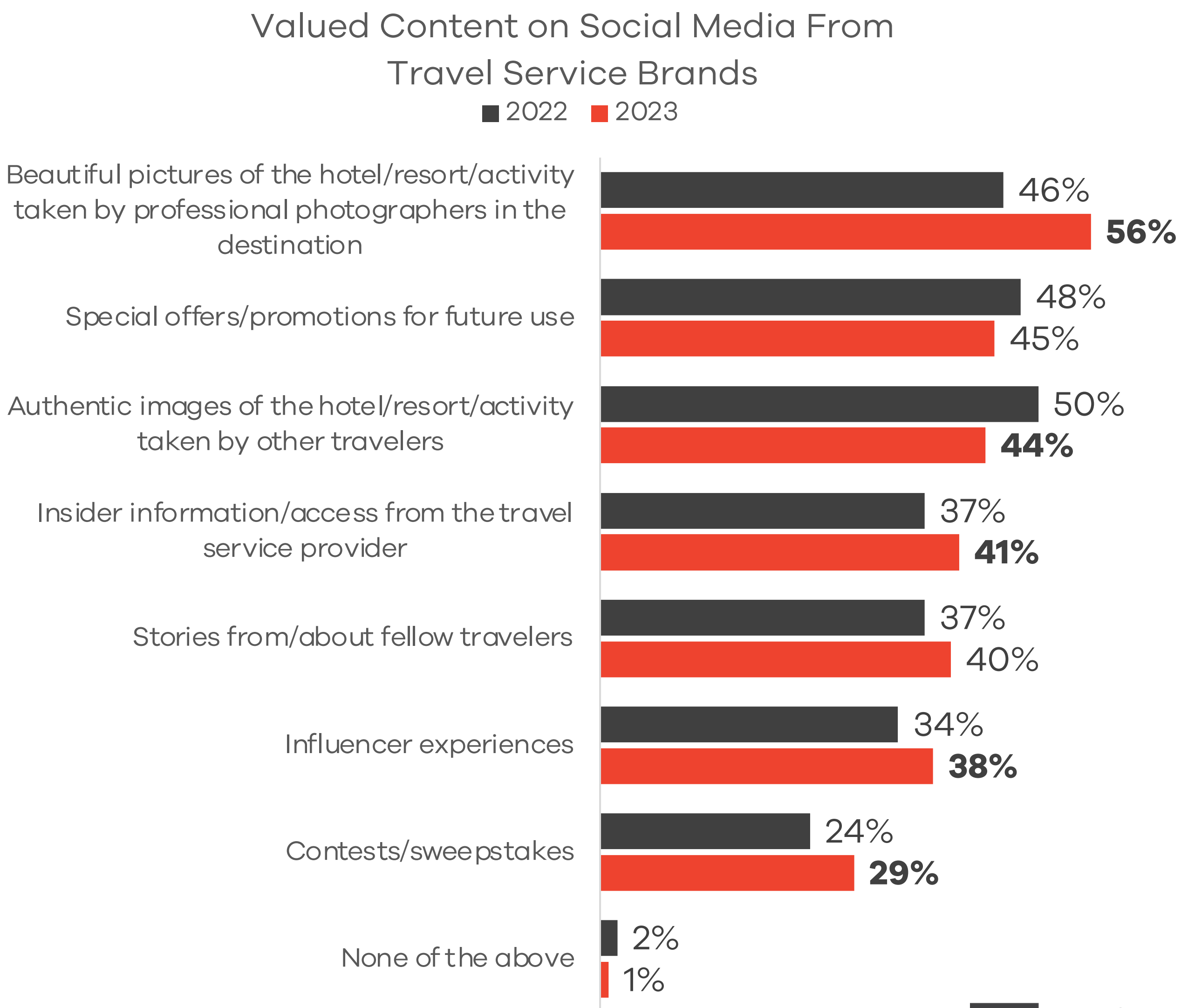
of active leisure travelers follow a travel service provider on social media.

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

Gen Zers: **42%**
Millennials: **41%**
Gen Xers: 23%
Boomers: 11%

Have Kids: **43%**
Don't Have Kids: 19%

Less than $100K: 23%
$100K or more: **33%**



Base: Active leisure travelers who have a page/profile on social media (n=2,818); those who follow a travel service provider on social media (n=782)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

A Similar Percentage of Active Leisure Travelers Follow Celebrities, Influencers and Content Creators on Social Media.

47% 2023

of active leisure travelers follow a celebrity on social media.

Gen Zers: **81%**
Millennials: **70%**
Gen Xers: 40%
Boomers: 13%

Have Kids: **64%**
Don't Have Kids: 38%

Less than $100K: **49%**
$100K or more: 45%

46% 2023

of active leisure travelers follow an influencer or content creator on social media.

Gen Zers: **84%**
Millennials: **66%**
Gen Xers: 38%
Boomers: 14%

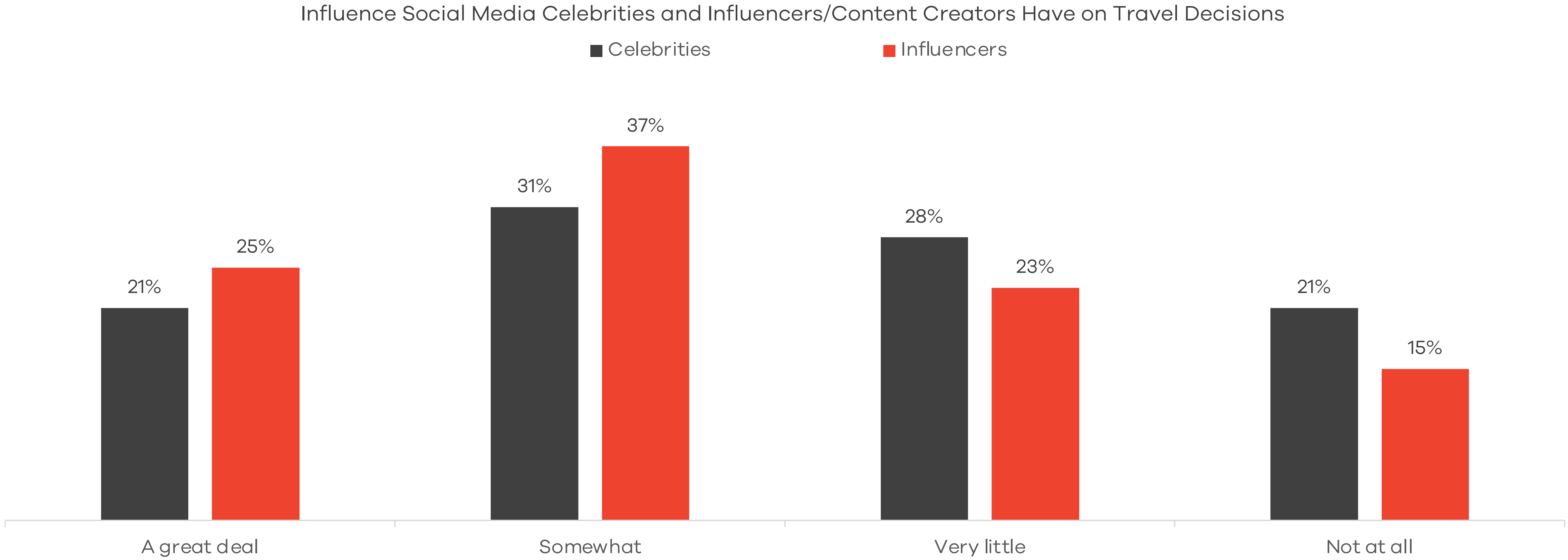
Have Kids: **63%**
Don't Have Kids: 37%

Less than $100K: 45%
$100K or more: 47%

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

Base: Active leisure travelers who have a page/profile on social media (n=2,818)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Winter Edition"

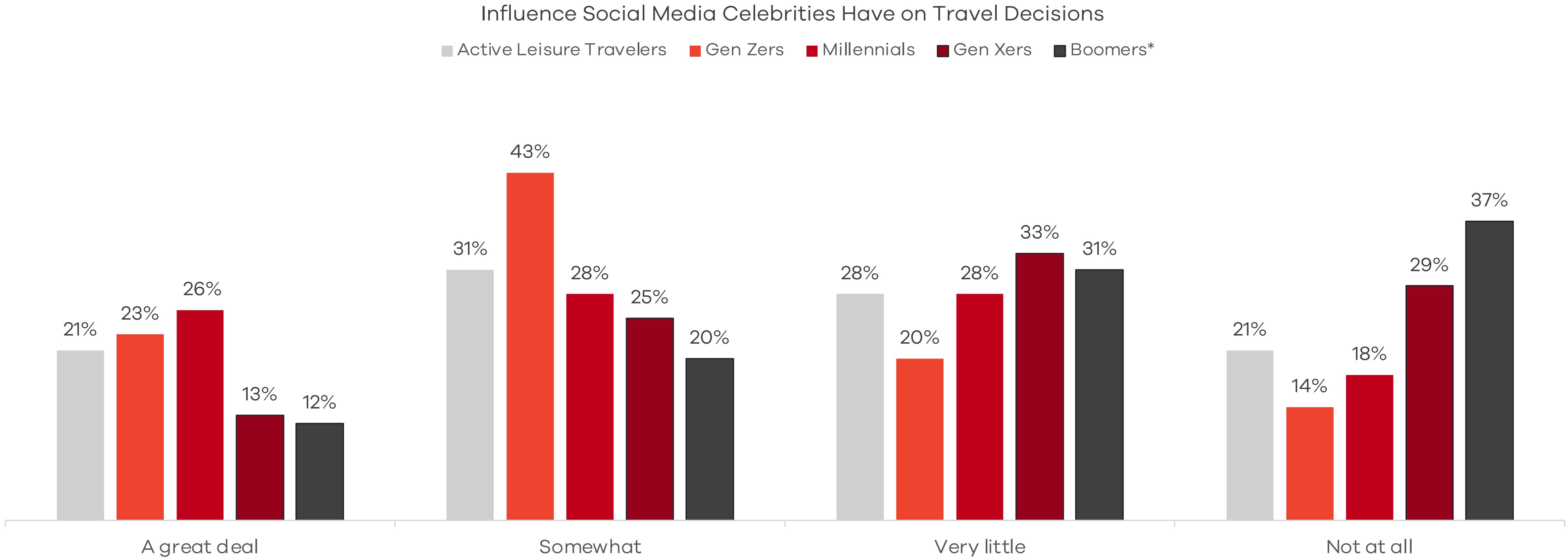
Active Leisure Travelers Report That Influencers and Content Creators Have More Influence Over Their Travel Decisions Than Celebrities.



Base: Active leisure travelers who have a page/profile on social media and who follow a celebrity (n=1,327) or influencer/content creator (n=1,294)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

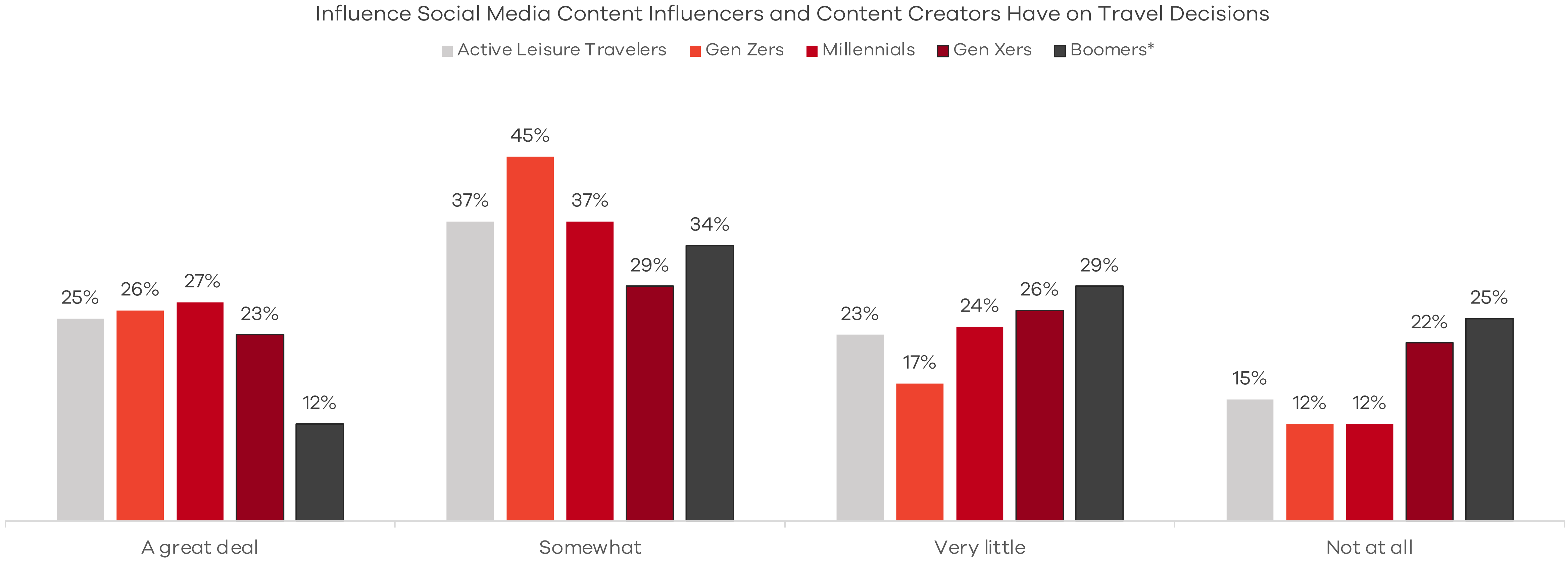
MMGY Travel Intelligence

Gen Zers Are the Most Influenced by Celebrities on Social Media When Making Travel Decisions.



*Small sample size – Interpret with caution
Base: Active leisure travelers who have a page/profile on social media and who follow a celebrity (n=1,327)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

Similarly, Gen Zers Are the Most Influenced by Influencers and Content Creators When Making Travel Decisions.



*Small sample size – interpret with caution.
Base: Active leisure travelers who have a page/profile on social media and who follow an influencer or content creator (n=1,294)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Three-Quarters of Active Leisure Travelers Perceive the Travel Content Influencers Share to Be Authentic Representations.

72%
2023

of active leisure travelers perceive the content influencers share to be authentic representations of the travel destinations they visit.

Gen Zers: 68%
Millennials: 71%
Gen Xers: 77%
Boomers*: 72%

Have Kids: **77%**
Don't Have Kids: 66%

Less than $100K: 69%
$100K or more: 75%

/ More travelers with kids perceive the content influencers share to be authentic representations of the travel destinations they visit.

*Small sample size – Interpret with caution
Base: Active leisure travelers who have a page/profile on social media and who follow an influencer or content creator (n=1,294)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Winter Edition"

Fewer Active Leisure Travelers Have Made a Travel Purchase Based At Least Partially on a Post by a Celebrity or Influencer.

51% 2022

43% 2023

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

Gen Zers: **53%**
Millennials: **50%**
Gen Xers: 32%
Boomers: 18%

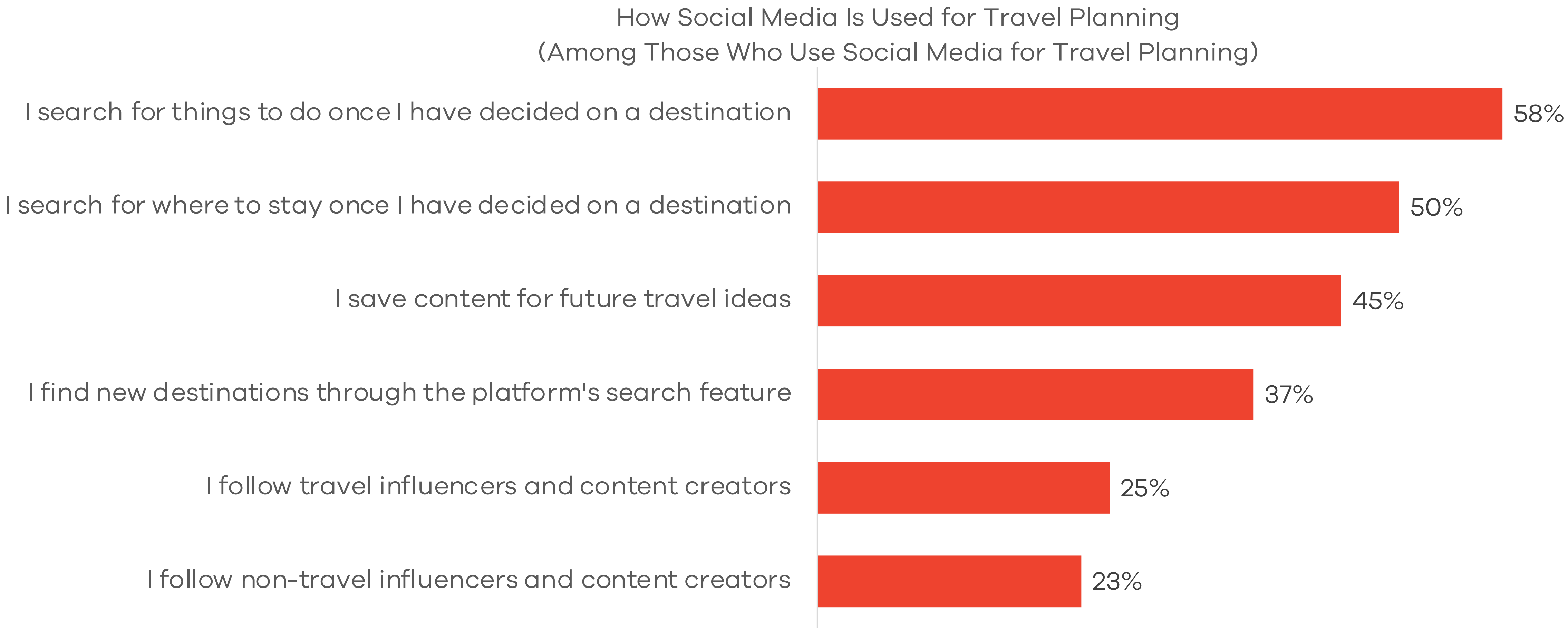
Have Kids: **55%**
Don't Have Kids: 33%

Less than $100K: 39%
$100K or more: **48%**

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

Base: Active leisure travelers who have a page/profile on social media and follow a celebrity or influencer on social media (n=1,601)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

More Than Half of Active Leisure Travelers Who Use Social Media for Travel Planning Do So to Search for Things to Do Once They Have Decided on a Destination.



Base: Active leisure travelers who use social media for planning travel (n=1,920)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

Social Media Agreement Statements

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

% Who Agree With Each Statement	Active Leisure Travelers	Gen Zers	Millennials	Gen Xers	Boomers
I like using social media to share my travel experiences	40%	45%	**49%**	42%	26%
I am likely to share travel content on social media while traveling	38%	39%	**48%**	42%	23%
I seek out "Instagrammable" photo opportunities while exploring a destination	24%	26%	**35%**	26%	10%
A destination's "Instagrammability" influences my choice of where to go on vacation	21%	23%	**33%**	21%	6%
I post my vacation photos on social media to make my friends jealous	20%	19%	**32%**	20%	8%

Base: Active leisure travelers who have a page/profile on social media
(Active leisure travelers: n=2,818; Gen Zers: n=375; Millennials: n=906; Gen Xers: n=721; Boomers: n=754)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Winter Edition"

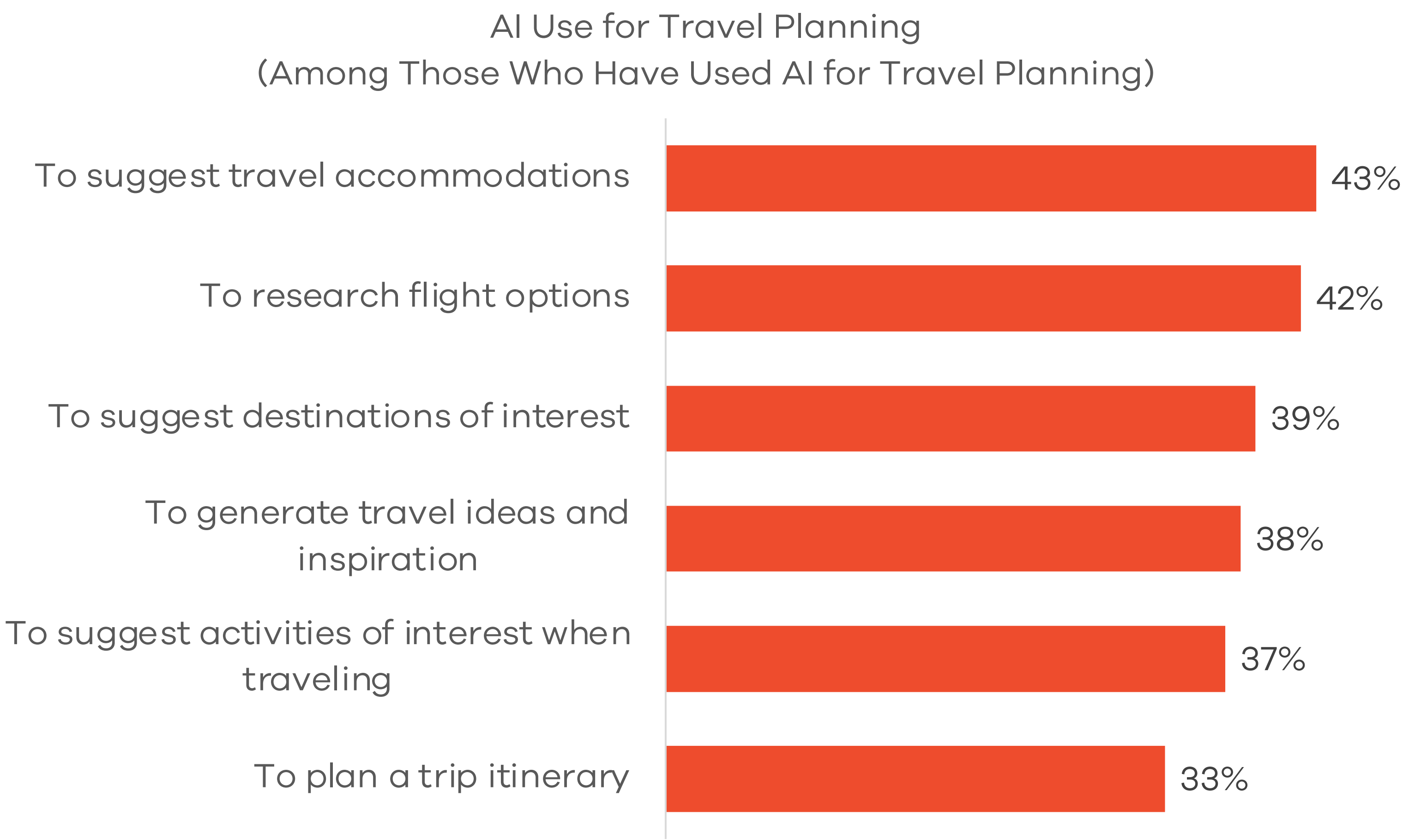
Vacation Motivators and Activities

MMGY Travel Intelligence

Slightly Fewer Active Leisure Travelers Have Used an AI Tool When Travel Planning Compared to Last Wave.

31%

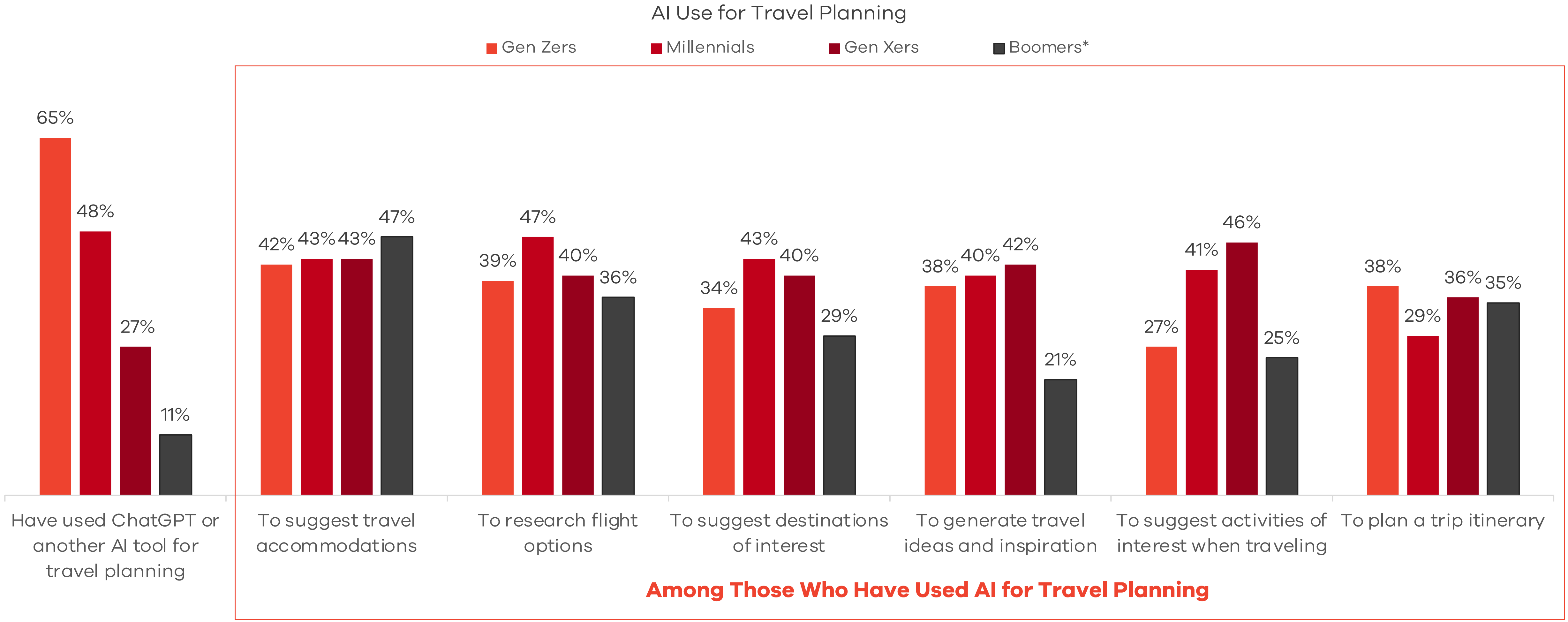
of active leisure travelers have used ChatGPT or another AI tool for travel planning (compared to 34% in Q3 2023).



Base: Active leisure travelers (n=3,299); those who have used ChatGPT or another AI tool for travel planning (n=1,037)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

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



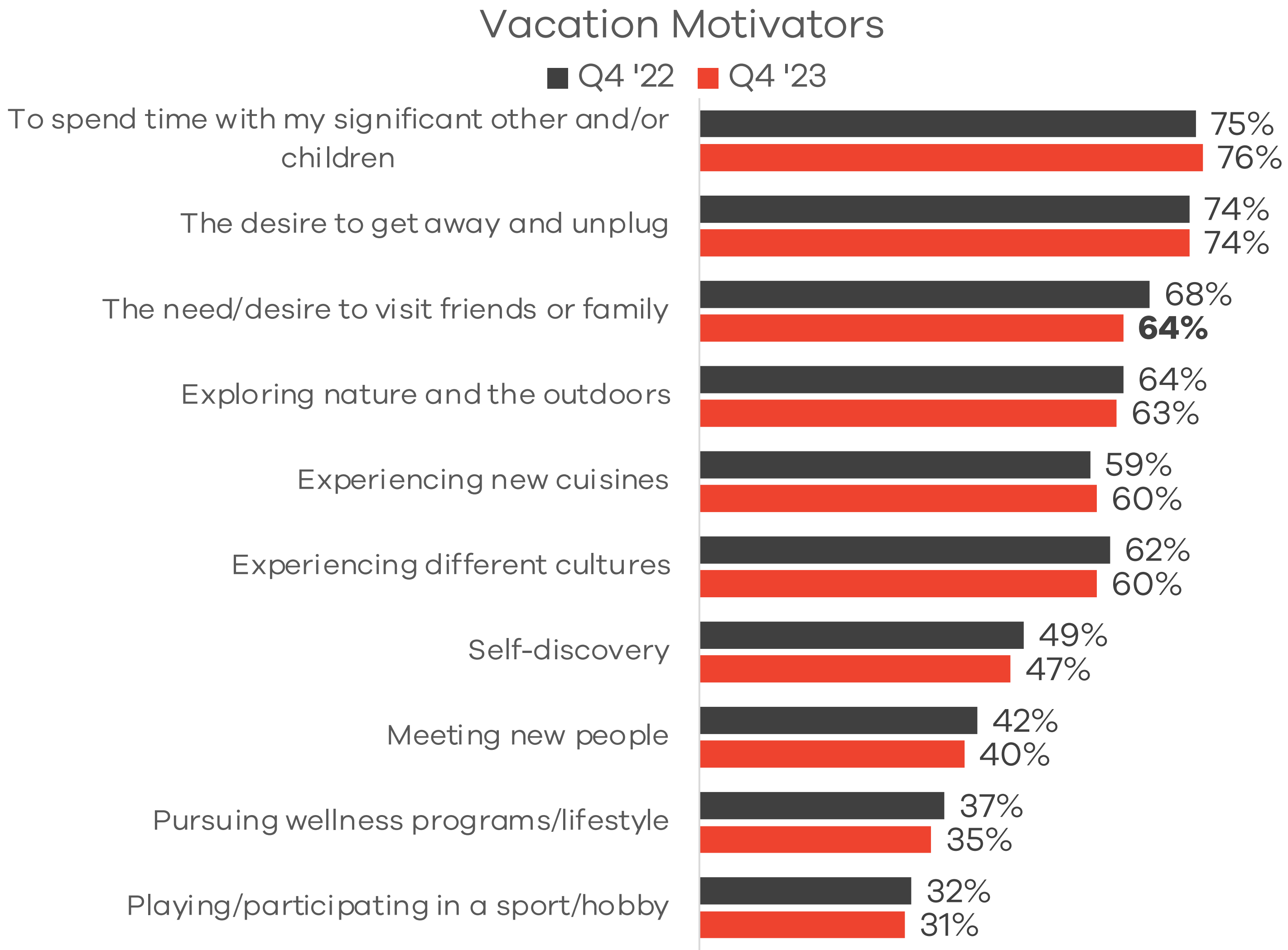
* Small sample size – interpret with caution.

Base: Those who have used ChatGPT or another AI tool for travel planning (Gen Zers: n=247; Millennials: n=449; Gen Xers: n=218; Boomers: n=118)

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

MMGY Travel Intelligence

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

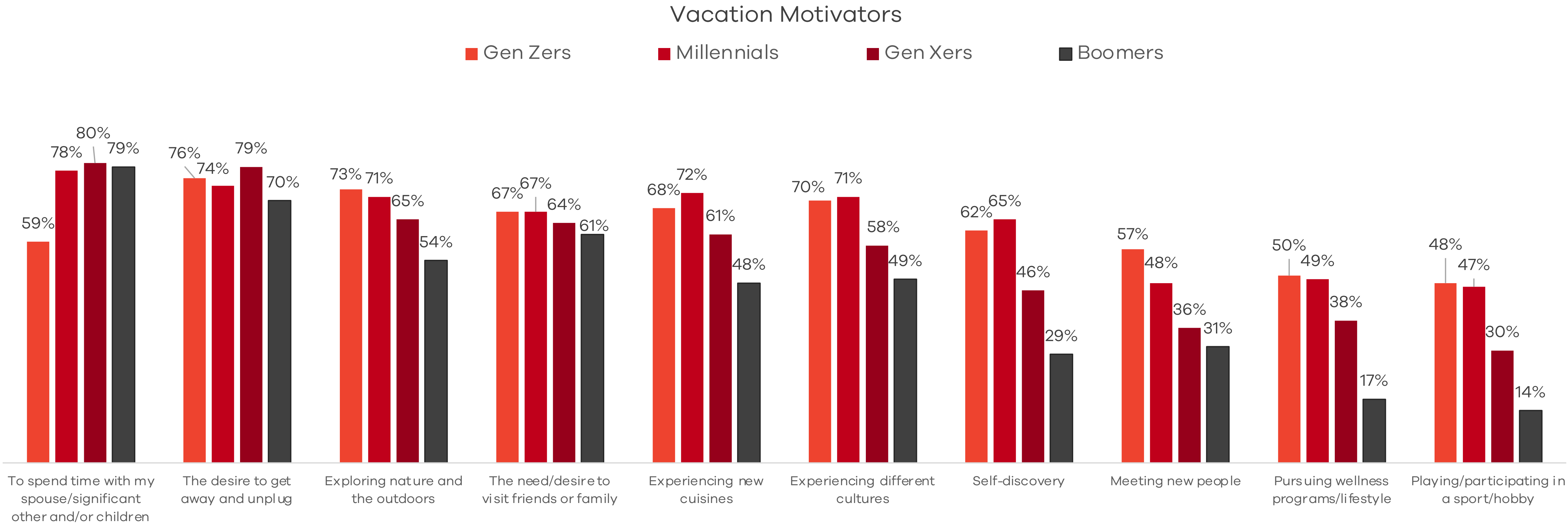


Data in bold indicates a statistically significant difference from Q4 2022.

Base: Active leisure travelers (n=3,299)

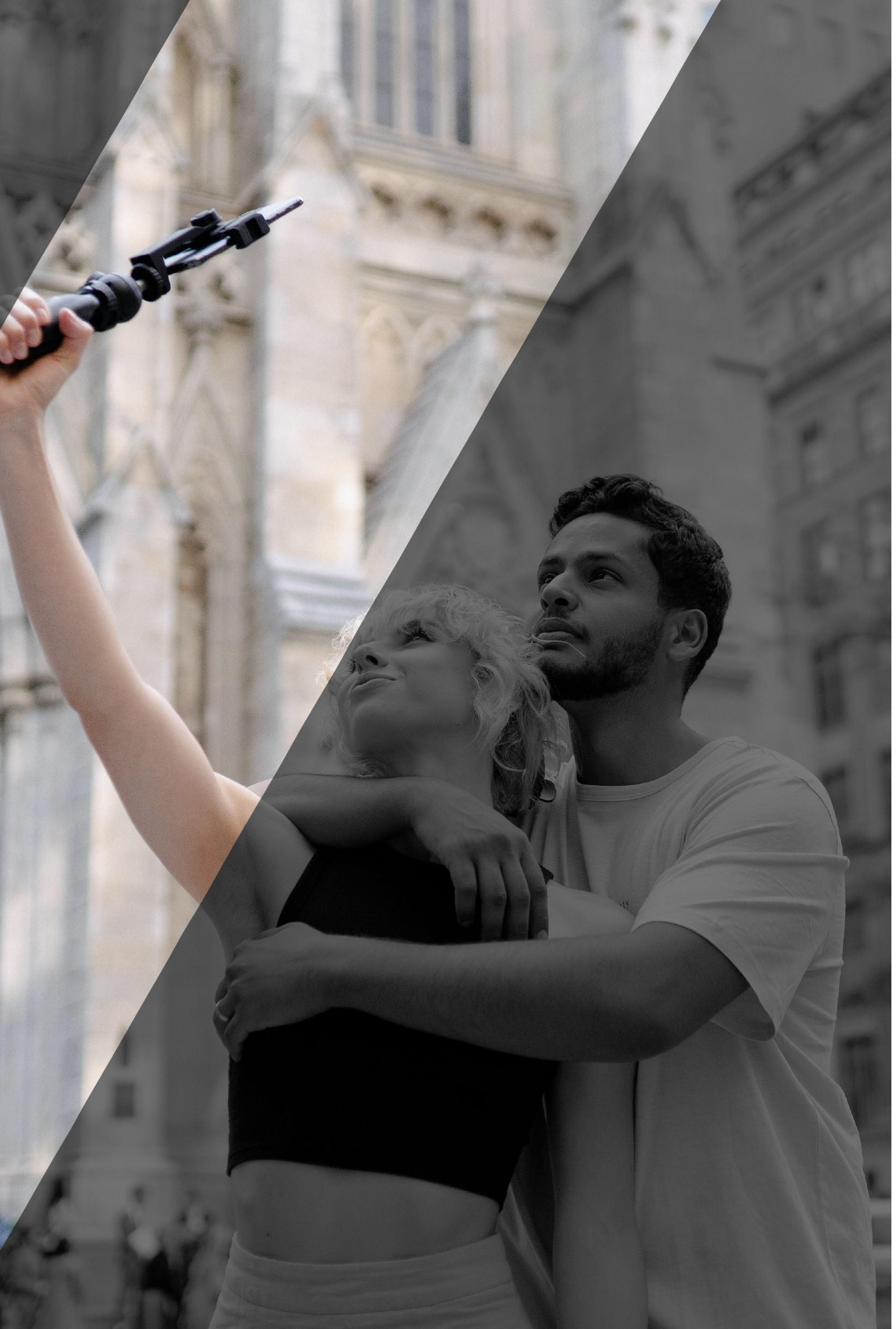
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

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.



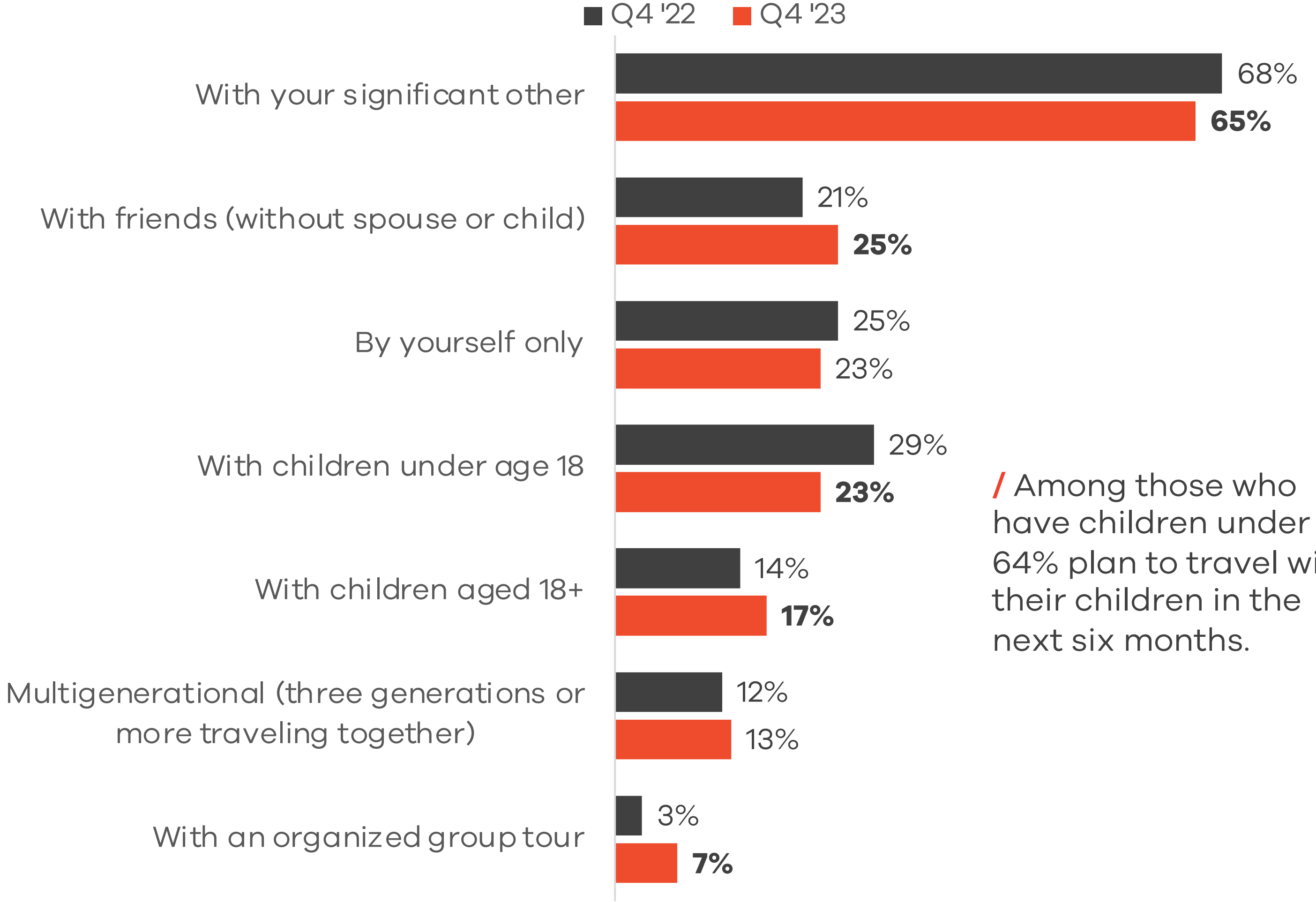
Base: Active leisure travelers (Gen Zers: n=379; Millennials: n=933; Gen Xers: n=816; Boomers: n=1,057)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Winter Edition"

MMGY Travel Intelligence



Couples Travel Remains the Most Common Form of Travel.

Travel Party During the Next Six Months



/ Among those who have children under 18, 64% plan to travel with their children in the next six months.

Data in bold indicates a statistically significant difference from Q4 2022.
Base: U.S. adults who intend to travel during the next six months (n=2,651)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Winter Edition"

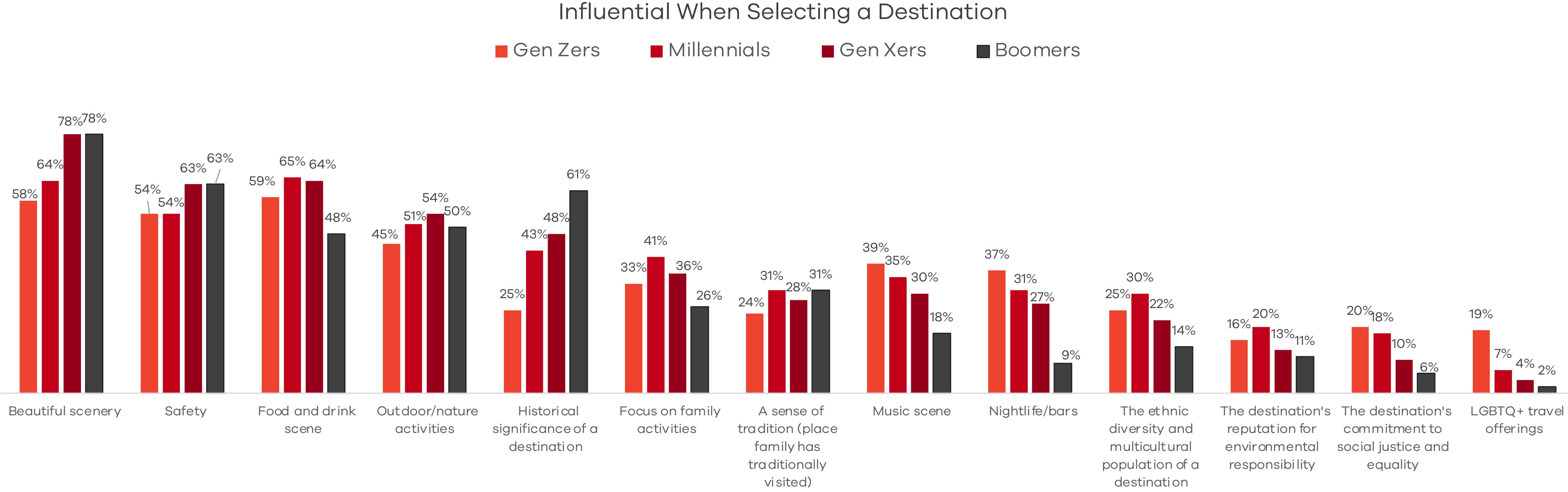
MMGY Travel Intelligence

Safety, Food and Drink Scene, Music Scene, and Nightlife All Increased in Influence From Last Year.

Influential When Selecting a Destination (Top-2 Box)	Q4 '22	Q4 '23
Beautiful scenery	72%	72%
Safety	56%	**59%**
Food and drink scene	54%	**58%**
Outdoor/nature activities	49%	50%
Historical significance of a destination	48%	48%
Focus on family activities	34%	34%
A sense of tradition (place family has traditionally visited)	32%	30%
Music scene	23%	**28%**
Nightlife/bars	20%	**23%**
The ethnic diversity and multicultural population of a destination	24%	22%
The destination's reputation for environmental responsibility	16%	14%
The destination's commitment to social justice and equality	14%	12%
LGBTQ+ travel offerings	6%	6%

Data in bold indicates a statistically significant difference from Q4 2022.
Base: Active leisure travelers (n=3,299)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

Younger Generations Are More Likely to Be Influenced by the Music Scene and Nightlife 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=379; Millennials: n=933; Gen Xers: n=816; Boomers: n=1,057)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Top Activities of Interest on Vacation

Top 25	Q4 '22	Q4 '23
Beach experiences	54%	55%
Historical sites	52%	51%
Visiting a state or national park	49%	48%
Visiting a museum	46%	48%
Shopping	47%	46%
Visiting a zoo or aquarium	42%	41%
Food tours	NA	35%
Visiting a theme or amusement park	35%	34%
Dining cruise	32%	33%
Attending a concert/music festival	29%	**33%**
Hiking/climbing/biking/other outdoor adventures	33%	32%
Visiting notable architectural sites	35%	**31%**
Casino gambling	27%	**30%**
Guided tours with access to local experiences that are otherwise inaccessible	31%	**28%**
Nightlife	25%	**28%**
Dinner theater	26%	26%
Cooking, wine or cocktail classes	NA	26%
Attending a sporting event	22%	**25%**
Camping	25%	25%
Spa services (massages, facials, etc.)	24%	25%
Adventure travel	25%	24%
Exploring family's ancestry/past on a heritage vacation	23%	22%
Attending performing arts events	18%	20%
Film/art festivals	19%	20%
Water sports (waterskiing, boating/rafting)	18%	19%

NA: Option was not asked in Q4 2022.
Base: Active leisure travelers (n=3,299)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

Although Activities of Interest Vary By Generation, Beach Experiences 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	45%	54%	61%	57%
Historical sites	24%	44%	50%	68%
Visiting a state or national park	37%	45%	49%	55%
Visiting a museum	46%	42%	45%	56%
Shopping	57%	51%	51%	35%
Visiting a zoo or aquarium	34%	44%	42%	40%
Food tours	44%	44%	38%	24%
Visiting a theme or amusement park	41%	43%	39%	24%
Dining cruise	29%	33%	36%	30%
Attending a concert/music festival	35%	35%	33%	32%
Hiking/climbing/biking/other outdoor adventures	28%	38%	36%	27%
Visiting notable architectural sites	21%	29%	30%	38%
Casino gambling	16%	31%	36%	28%
Guided tours with access to local experiences that are otherwise inaccessible	25%	27%	31%	29%
Nightlife	38%	35%	33%	16%
Dinner theater	26%	28%	28%	22%
Cooking, wine or cocktail classes	31%	32%	24%	20%
Attending a sporting event	20%	25%	27%	24%
Camping	27%	35%	31%	13%
Spa services (massages, facials, etc.)	28%	33%	28%	15%

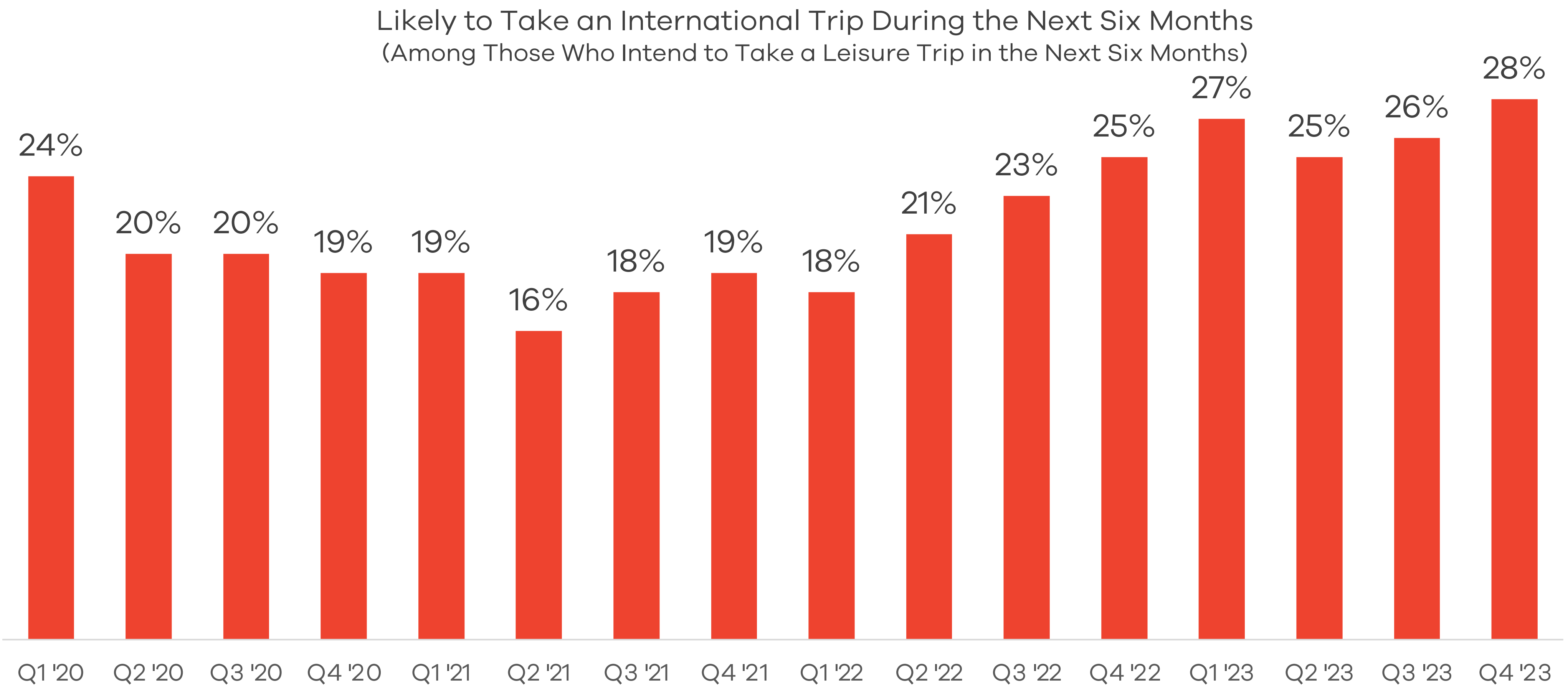
Base: Active leisure travelers (Gen Zers: n=379; Millennials: n=933; Gen Xers: n=816; Boomers: n=1,057)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

International Travel Intentions

MMGY Travel Intelligence

Likelihood to Take an International Trip in the Next Six Months Continues to Increase.



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*® "Winter Edition"

MMGY Travel Intelligence

Measured Interest in International Travel Is Up From One Year Ago.

75% 2022

80% 2023

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

Gen Zers: **93%**
Millennials: **88%**
Gen Xers: 78%
Boomers: 73%

Have Kids: **87%**
Don't Have Kids: 77%

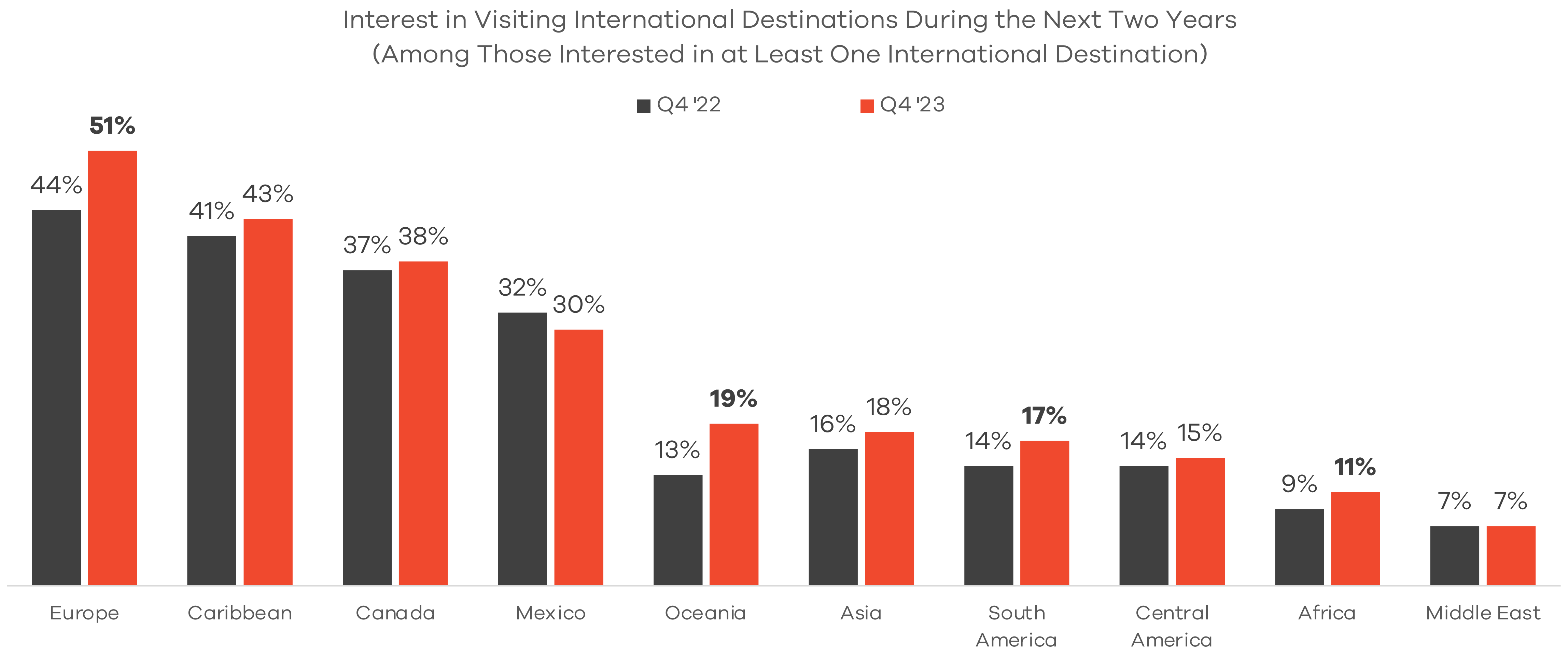
Less Than $100K: 74%
$100K or more: **86%**

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

Base: Active leisure travelers (n=3,299)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

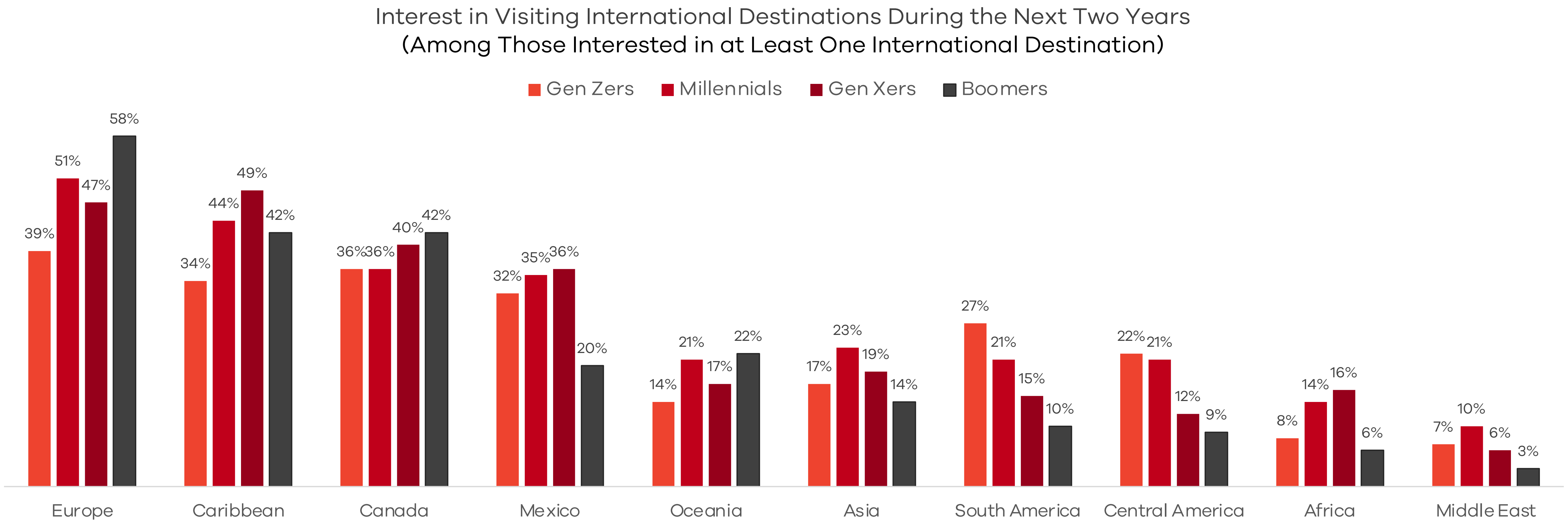
Interest in Visiting Europe, Oceania, South America and Africa Have Increased From One Year Ago.



Data in bold indicates a statistically significant difference from Q4 2022.
Base: Active leisure travelers interested in at least one international destination (n=2,644)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

Interest in Many International Destinations Varies by Generation.

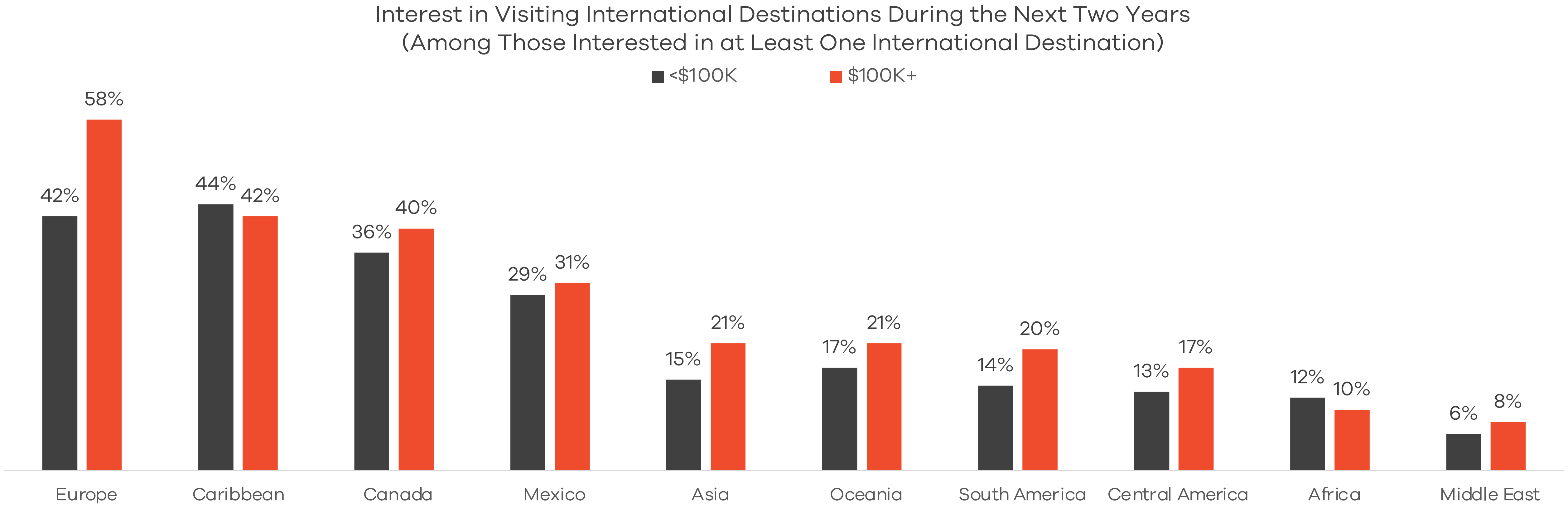
/ Popular international destinations are more appealing to older travelers, while less popular destinations such as South America and Central America are more appealing to younger travelers.



Base: Active leisure travelers interested in at least one international destination (Gen Zers: n=352; Millennials: n=819; Gen Xers: n=640; Boomers: n=774)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Winter Edition"

MMGY Travel Intelligence

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=1,188; $100K+: n=1,455)
Source: MMGY Global's 2023 *Portrait of American Travelers®* "Winter 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	Q4 '22	Q4 '23
The Bahamas	54%	56%
U.S. Virgin Islands	40%	**47%**
Jamaica	38%	40%
Puerto Rico	32%	**39%**
Cayman Islands	29%	**37%**
Aruba	33%	31%
St. Maarten/St. Martin	31%	29%
Barbados	32%	29%
Dominican Republic	28%	27%
Bermuda	27%	27%
British Virgin Islands	40%	**26%**
Antigua	15%	**21%**
Cuba	17%	**14%**
Other	4%	3%

Mexico Destinations Interested in Visiting During the Next Two Years	Q4 '22	Q4 '23
Cancún	56%	56%
Los Cabos/Cabo San Lucas	41%	38%
Mexico City	37%	36%
Puerto Vallarta	36%	35%
Cozumel	29%	**34%**
Riviera Maya	29%	**23%**
Guadalajara	14%	**18%**
Other	7%	5%

Canada Destinations Interested in Visiting During the Next Two Years	Q4'22	Q4 '23
Toronto	54%	55%
Vancouver	51%	54%
Montreal	47%	45%
Québec	39%	40%
Victoria	27%	24%
Banff	17%	20%
Ottawa	18%	19%
Whistler	14%	14%
Other	6%	4%

Data in bold indicates a statistically significant difference from Q4 2022.
Base: Active leisure travelers interested in visiting the Caribbean (n=1,138); Mexico (n=799); Canada (n=1,012)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

Respondent Demographics

Traveler Personas

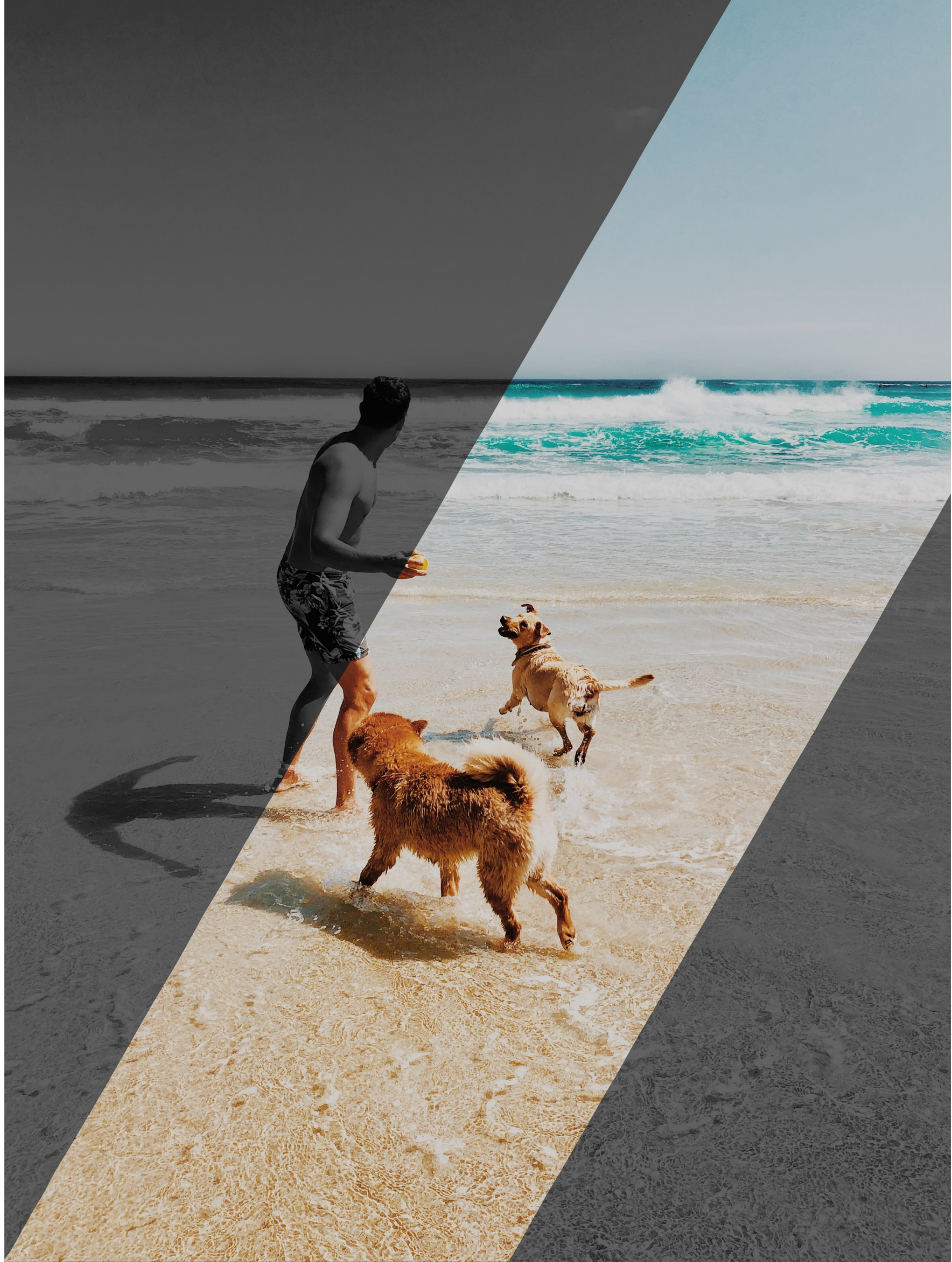
Percent Who Self-Identify With Each Descriptor

	Q4 '22	Q4 '23
Beach lover	46%	**49%**
Pet lover	41%	42%
Foodie	42%	41%
Family traveler	37%	38%
Travel bargain hunter	28%	28%
Sports fan/enthusiast	25%	**30%**
Outdoor adventurer	29%	29%
Conservative (politically)	22%	**25%**
Moderate (politically)	23%	21%
Theme park enthusiast	23%	23%
Concert/festival enthusiast	21%	23%
World traveler	22%	20%
Cruise lover	20%	21%
Environmentally conscious	21%	**18%**
Liberal (politically)	19%	18%
All-inclusive resort enthusiast	21%	21%
Wine enthusiast	20%	19%
Video game enthusiast	NA	16%
Luxury traveler	18%	18%
Cocktail enthusiast	NA	16%
Recreational cannabis user	11%	13%
Golf enthusiast	10%	10%
Social justice activist	9%	8%
Road warrior (business travel)	5%	6%
Ski/snowboard enthusiast	7%	6%

NA: Option was not asked in Q4 2022.

Base: Active leisure travelers (n=3,299)

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



Respondent Demographics

	Active Leisure Travelers	Gen Zers	Millennials	Gen Xers	Boomers
Male	52%	45%	54%	46%	56%
Female	48%	53%	45%	54%	43%
Other	0%	2%	0%	0%	0%
Gen Zers	11%	100%	-	-	-
Millennials	28%	-	100%	-	-
Gen Xers	25%	-	-	100%	-
Boomers	32%	-	-	-	100%
Household income (median)	$102.5K	$82.7K	$89.4K	$104K	$117K
Have children under 18 at home	32%	30%	60%	39%	5%
White	75%	52%	66%	71%	93%
Hispanic	16%	26%	23%	13%	10%
African American/Black	13%	23%	21%	15%	1%
Asian	7%	12%	8%	9%	4%
Native American	2%	2%	2%	3%	1%
Pacific Islander	1%	3%	1%	0%	0%
Other	4%	10%	5%	3%	2%

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

Respondent Demographics

	Active Leisure Travelers	Gen Zers	Millennials	Gen Xers	Boomers
Married/living together	65%	29%	65%	67%	77%
Never married	21%	63%	28%	17%	4%
Divorced/separated/widowed	14%	7%	7%	17%	19%
4 years or less of high school	32%	42%	35%	28%	28%
1–3 years of college	28%	31%	24%	30%	28%
4 years of college	26%	20%	24%	27%	31%
Some graduate school	3%	5%	3%	2%	3%
Graduate/professional degree	12%	4%	14%	14%	10%
Employed (full time or part time)	59%	72%	86%	69%	27%
Retired	28%	0%	1%	11%	68%
Temporarily unemployed	5%	11%	6%	7%	2%
Homemaker (full time)	6%	1%	5%	13%	3%
Student	2%	16%	2%	0%	0%

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

MMGY Travel Intelligence

THANK YOU

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