
PORTRAIT
OF
Winter 2024
AMERICAN
TRAVELERS®
MMGY Travel Intelligence

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Methodology

MMGY's *Portrait of American Travelers®* deals exclusively with leisure travel. The travel trend information presented in this report was obtained from surveys of 4,500 U.S. adults in October–November 2024.

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 3,633 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=3,633) is +/- 1.68% at the 95% level of confidence. Please note, not all charts sum to 100% due to rounding.

Generation	Age	% of Respondents
Gen Zers	18–25	13%
Millennials	26–41	30%
Gen Xers	42–57	26%
Boomers	58–76	29%
Silent/GI	77+	2%

Key Insights

Key Insights

Travel Outlook

- American travelers are itching to travel more, with survey results showing larger budgets, an increase in trips and traveler sentiment at its second highest since July 2022.
- American travelers are planning to spend more on vacations ($5,051) and take more trips (an average of 4.1) in the next 12 months compared to any time in the past two years.
- Larger travel budgets are partially due to travelers simply choosing to spend more (30% vs. 25% in 2023), as opposed to higher travel prices necessitating larger budgets.
- Furthermore, 8 in 10 (79%) travelers are planning a getaway in the next 12 months, a 7% increase from Q4 '23.
- Demand for travel is reaching its highest rate in almost four years, eclipsing the post-COVID "revenge travel" boom as Americans continue to devote larger proportions of their disposable incomes to vacations.

Where People Want to Visit (Domestic Destinations)

- Following Hurricane Helene, destinations across Florida saw a significant decrease in travel interest compared to Q4 '23.
- Likewise, Texas saw a drop in interest, with Corpus Christi and Houston seeing significantly fewer travelers expressing interest.
- Alternatively, New York City and destinations across Hawaii and California saw significant increases in intent.

Online Travel Agencies (OTAs)

- OTAs are primarily, and increasingly, used for comparing prices and availability (73%), particularly among older generations.
- Younger travelers are motivated by this comparison feature but also find the user experience and familiarity with OTAs through advertising to be significant motivators for use.

Key Insights

Online Travel Agencies (cont.)

- Three-quarters (77%) of American travelers are planning to use OTAs, although concerns that they will be unable to collect loyalty points or have difficulty canceling/changing bookings have increased compared to 2023.

Brand Loyalty

- There has been significant growth in brand loyalty across active leisure travelers, with airlines and hotels seeing extensive growth in their loyalty programs.
- For airline loyalty programs, the ability to earn redeemable loyalty points has become **as important** as previous positive experiences, highlighting just how critical these programs are for driving repeat business.
- Large hotel brands are gaining a larger share of the market, with Marriott and Hilton seeing significantly more booking consideration than smaller brands.
- Hotel booking consideration has also seen significant growth from 2023, indicating that the benefits from their loyalty programs are playing a pivotal role in driving growth for these businesses.

Brand Loyalty (cont.)

- The importance of hotel and airline loyalty programs is underpinned by the growth in members across both sectors.
- There was a 6% growth in hotel loyalty program members from 2023 (51% to 57%); airlines saw an even larger growth of 8% from 2023 (47% to 55%).
- Furthermore, Millennials and Gen Xers showed the largest increase in loyalty program membership, with growth in hotel loyalty among Gen X members up 16% from 2023 and up 11% for Millennials. This difference is even more pronounced among airline loyalty program members, with the number of Gen X subscribers increasing 18% from 2023 and Millennials increasing 16%.
- Finally, there was a 10% growth in airline and hotel loyalty program subscriptions among leisure travelers with HHIs of $100K+.

Key Insights

Social Media

- Social media plays a powerful role in influencing travel purchases among American leisure travelers who follow celebrities or influencers, with 41% of this group reporting that a post from a celebrity or influencer has at least partially shaped purchase decisions.
- Travelers are looking for authentic stories and pictures from real travelers across social media. Authentic images resonate the most with American leisure travelers, with 54% valuing this content from destination pages.
- This is linked to the shrinking perception of travel content as authentic, with an 11% drop from 2023 in travelers perceiving content from influencers as authentically representing destinations (72% to 61%).
- Furthermore, content creators and travel influencers are significantly more influential than celebrities when it comes to travel decisions, with over half (51%) of travelers saying they had been influenced "a great deal" or "somewhat" by influencers compared to 41% by celebrities.

Vacation Motivators and Activities

- Older generations find traveling to see or spend time with family a particularly strong motivation, while younger Americans enjoy experiencing diverse cultures and sampling the cuisines available.
- Overall, scenic or natural locations are the top priority across all generations, with visiting national parks among the top activities for all generations.
- Solo travel is also becoming more important, with 27% of Americans planning a solo vacation in the next six months compared to 23% in 2023.

International Travel Intentions

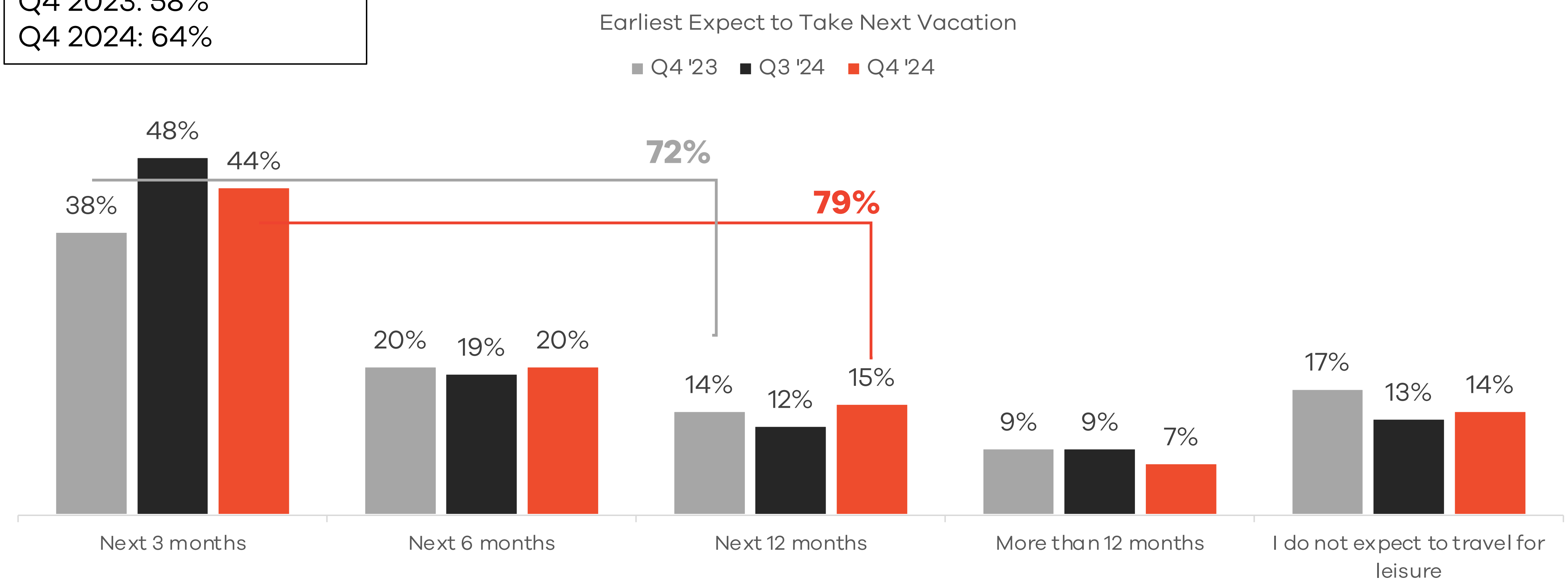
- Demand for international travel in the next six months grew 6% from Q3 (29% to 35%), while demand for international travel in the next two years increased 4% (80% to 84%), over the same period.
- Interest in international travel over the next six months is at its highest since 2020, with far more travelers than in previous years planning holidays between November and April. The low-cost and less-crowded nature of off-peak vacations continues to become more attractive to American leisure travelers.

Travel Outlook Snapshot

MMGY Travel Intelligence

Travel intentions for Q4 2024 have increased from the previous year, with Americans expressing a strong interest in traveling over the next 12 months.

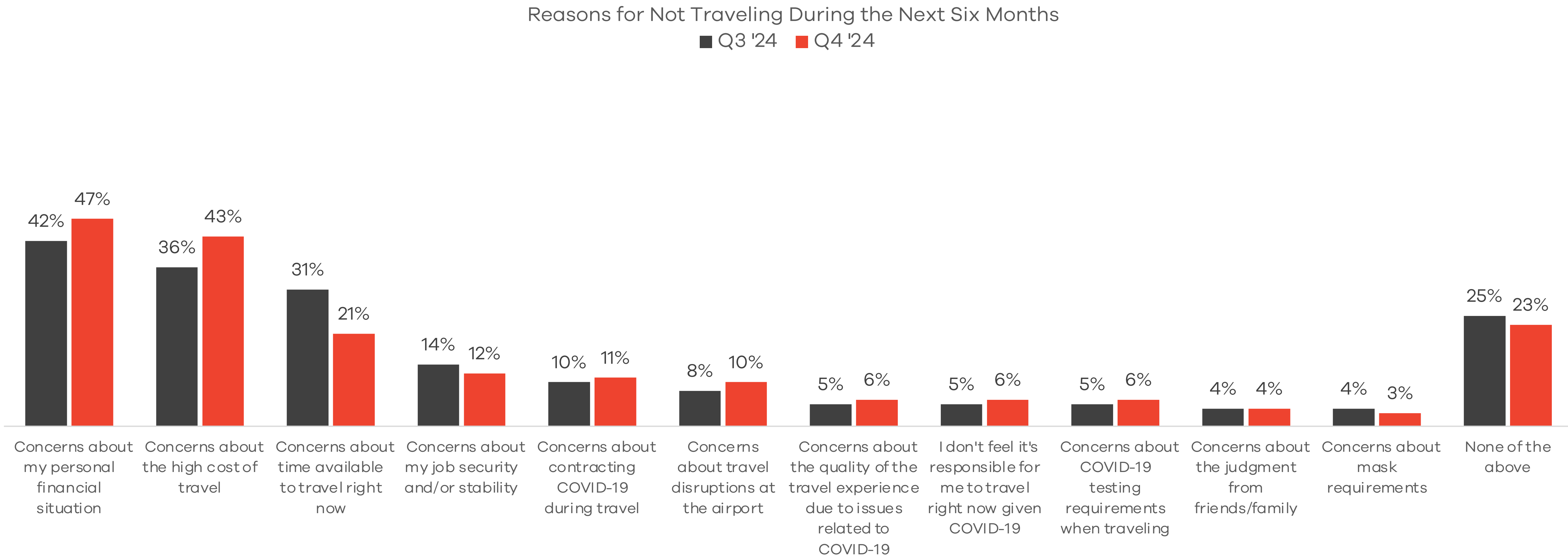
Sum of Next 6 Months
Q4 2023: 58%
Q4 2024: 64%



Base: U.S. adults (n=4,500)
Source: MMGY's 2024 *Portrait of American Travelers®* "Winter Edition"

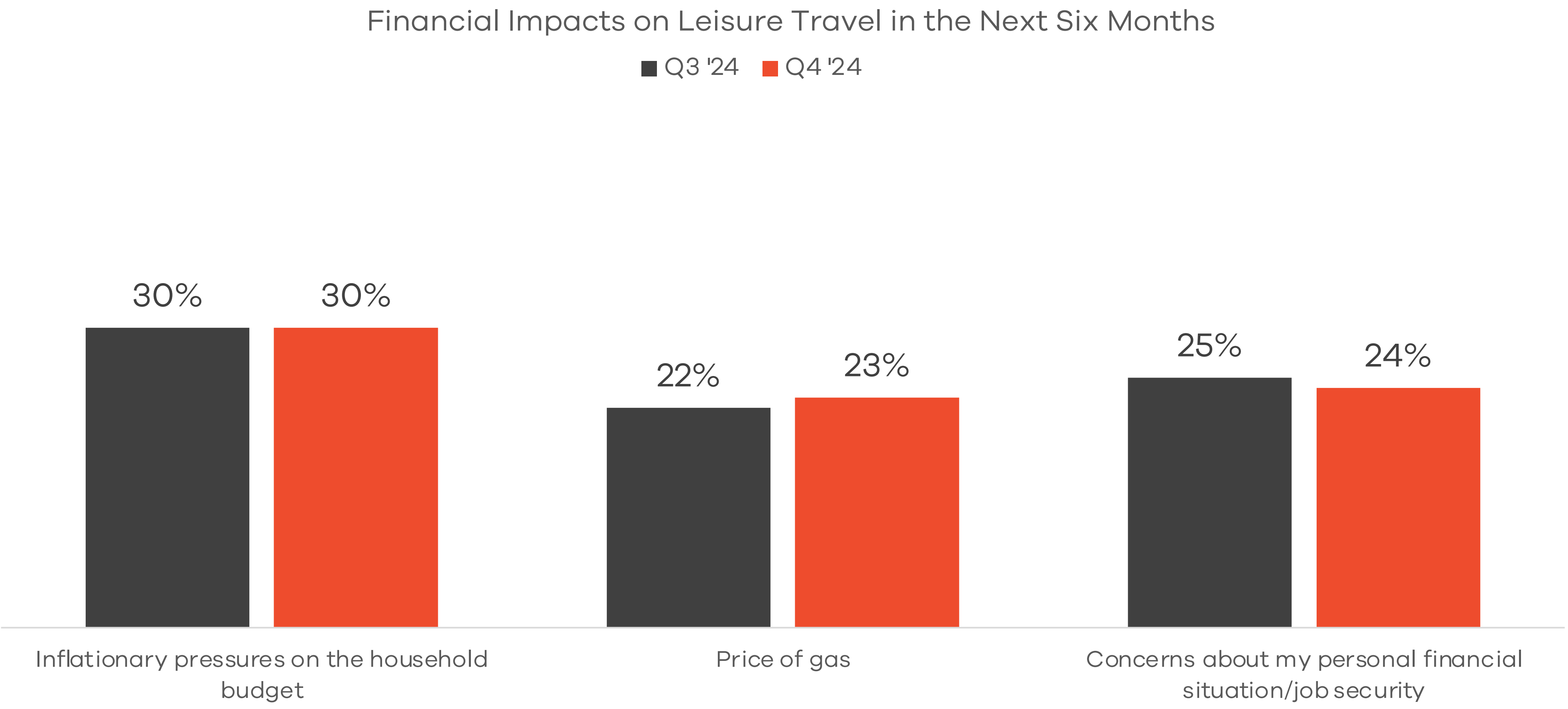
MMGY Travel Intelligence

Financial concerns have increased from the previous quarter, but Americans are significantly less concerned about time available for travel.



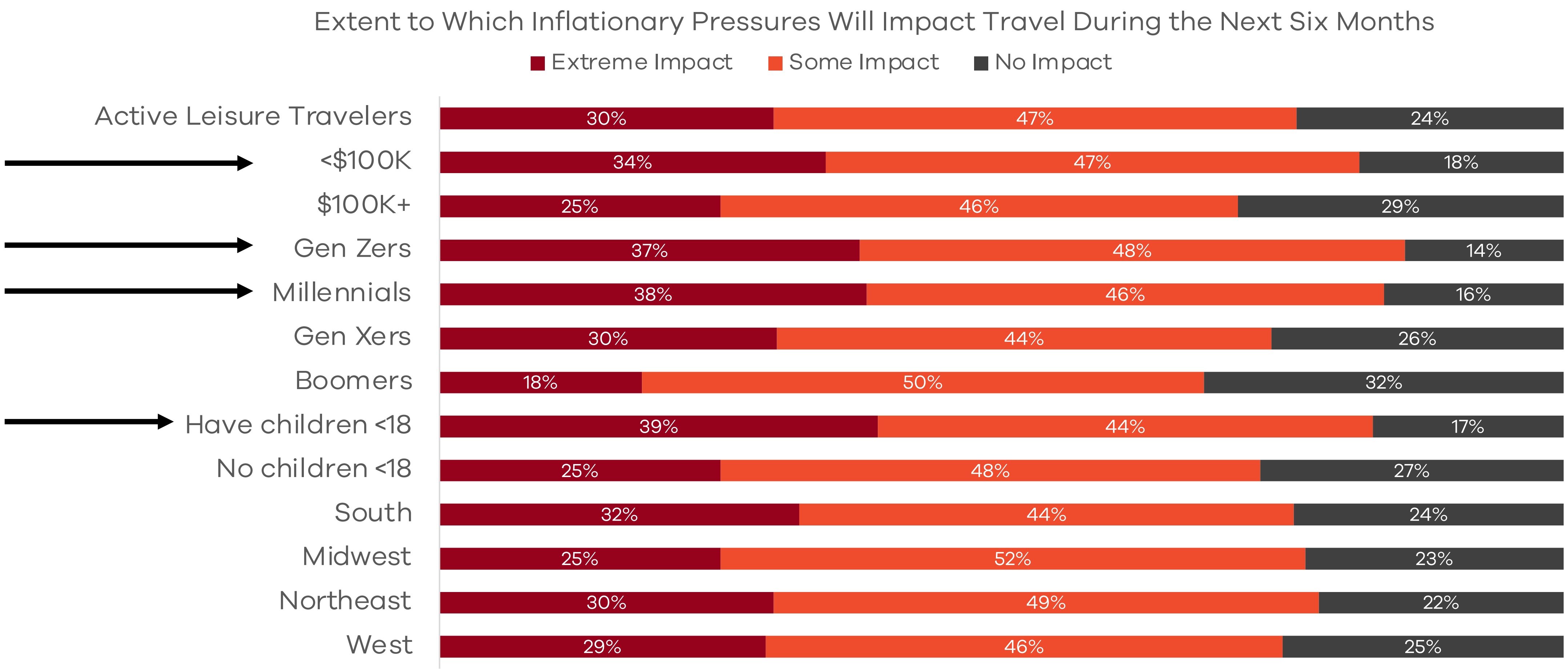
Base: Active leisure travelers without travel plans during the next six months (n=1,520)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

Financial concerns continue to have a similar impact on American travelers in the fourth quarter.



Base: Active leisure travelers (n=3,633)
Source: MMGY's 2024 *Portrait of American Travelers®* "Winter Edition"

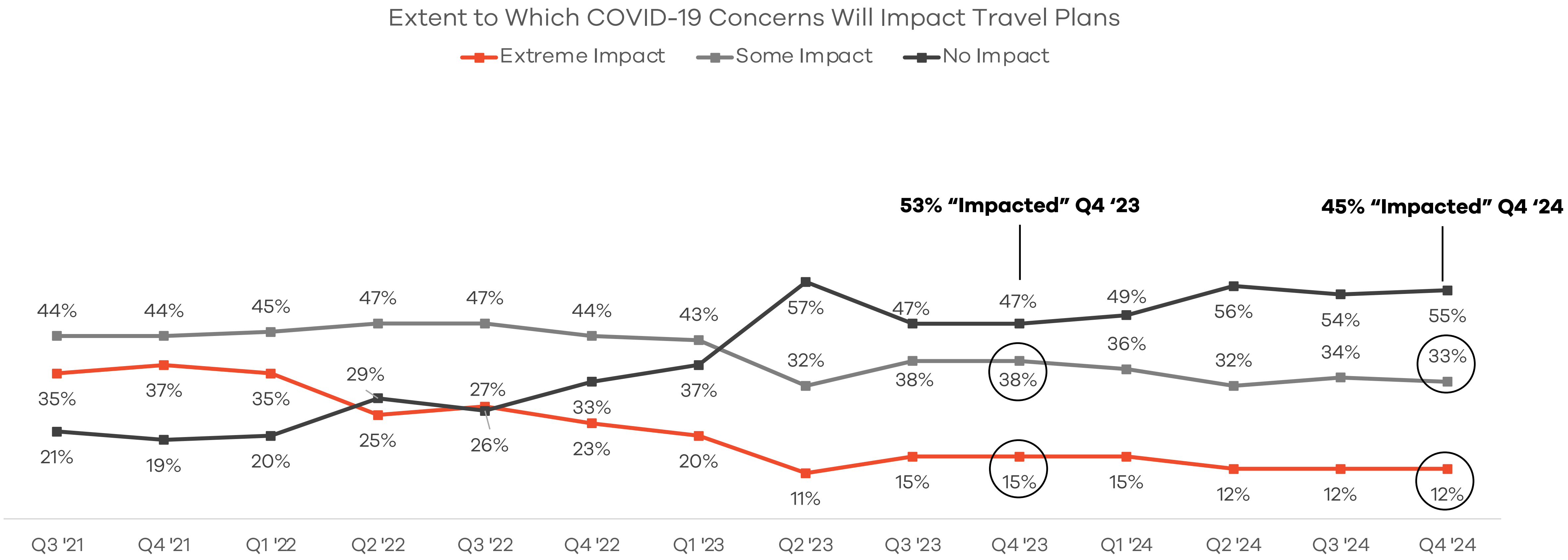
Inflationary pressures have the most significant impact on Gen Zers, Millennials, those with lower household incomes, and families.



Base: Active leisure travelers (n=3,633)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

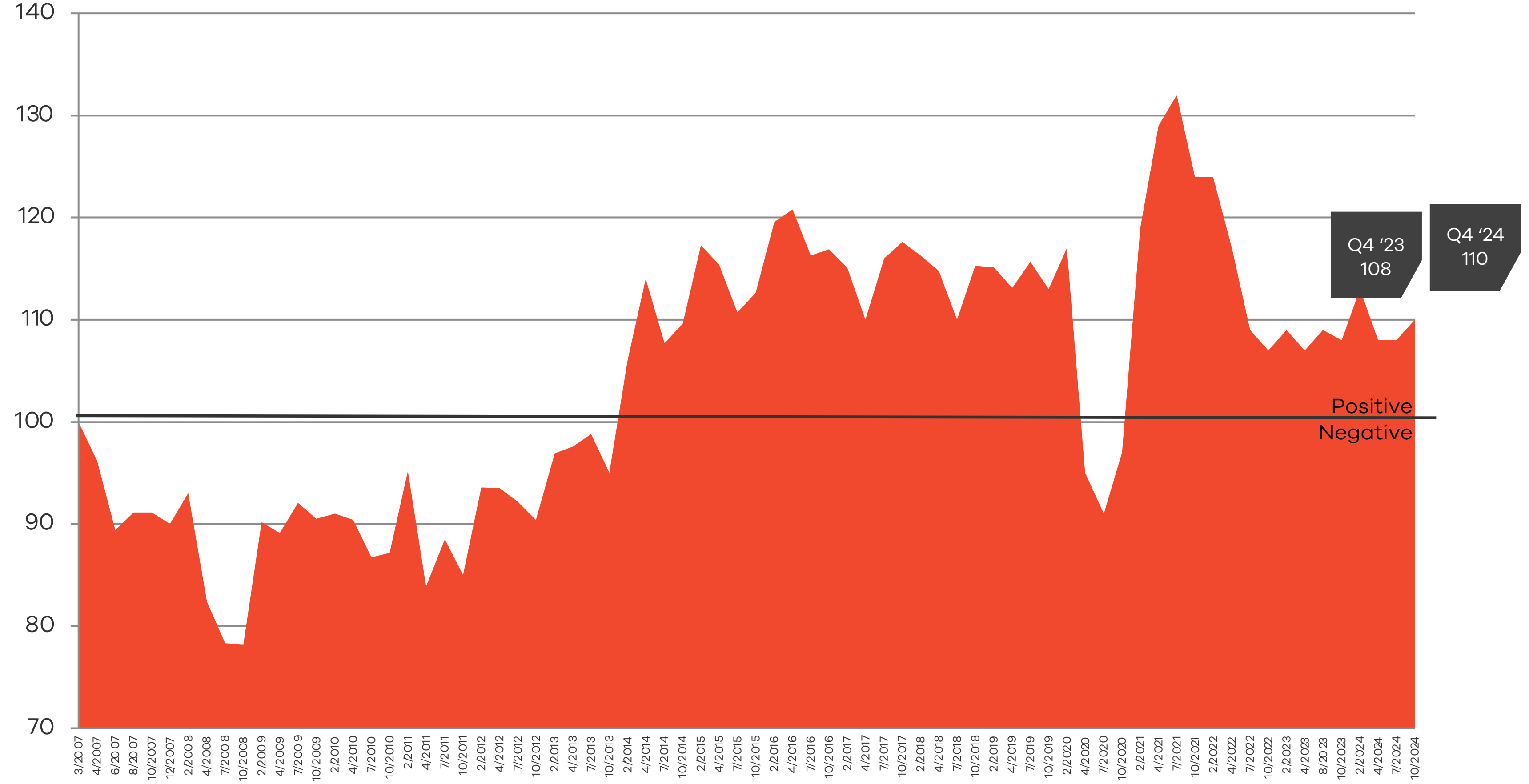
The reported impact of COVID-19 continues to decrease year over year.



Base: Active leisure travelers (n=3,633)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Traveler Sentiment Index™ (TSI): increased slightly from one year ago.

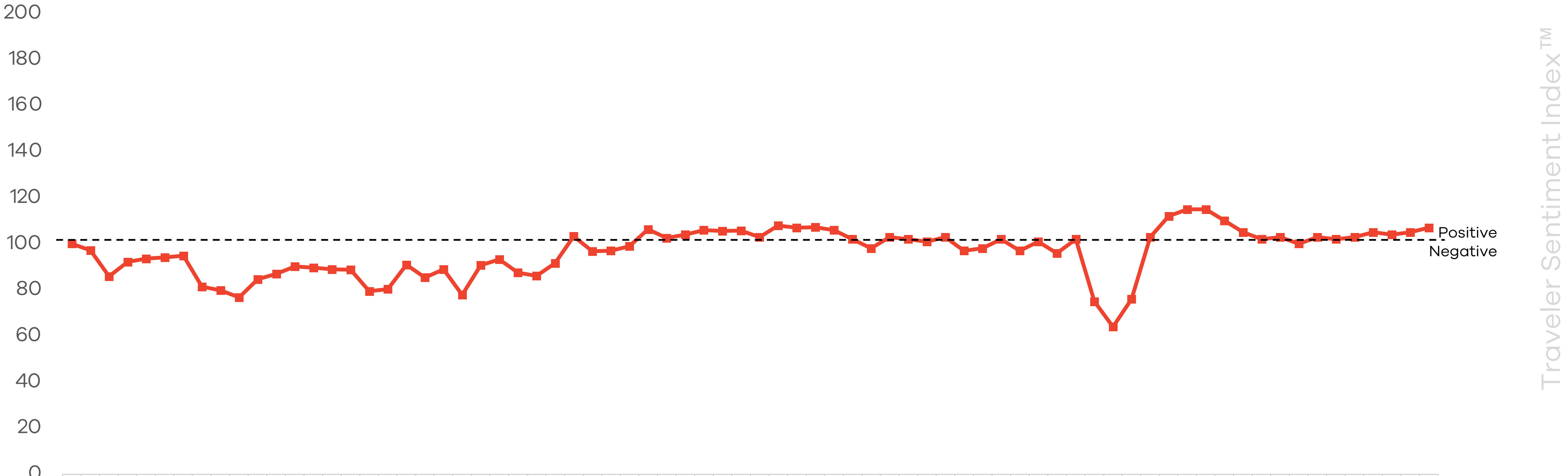


The Traveler Sentiment Index™ (TSI) consists of six variables, including interest in travel, time available for travel, personal finances available for travel, affordability of travel, quality of service and safety of travel. It provides a glimpse into how U.S. adults are feeling about travel this year 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=4,500)
Source: MMGY's *travelhorizons*™/2024 *Portrait of American Travelers*® "Winter Edition"

Index 1: Interest in Travel



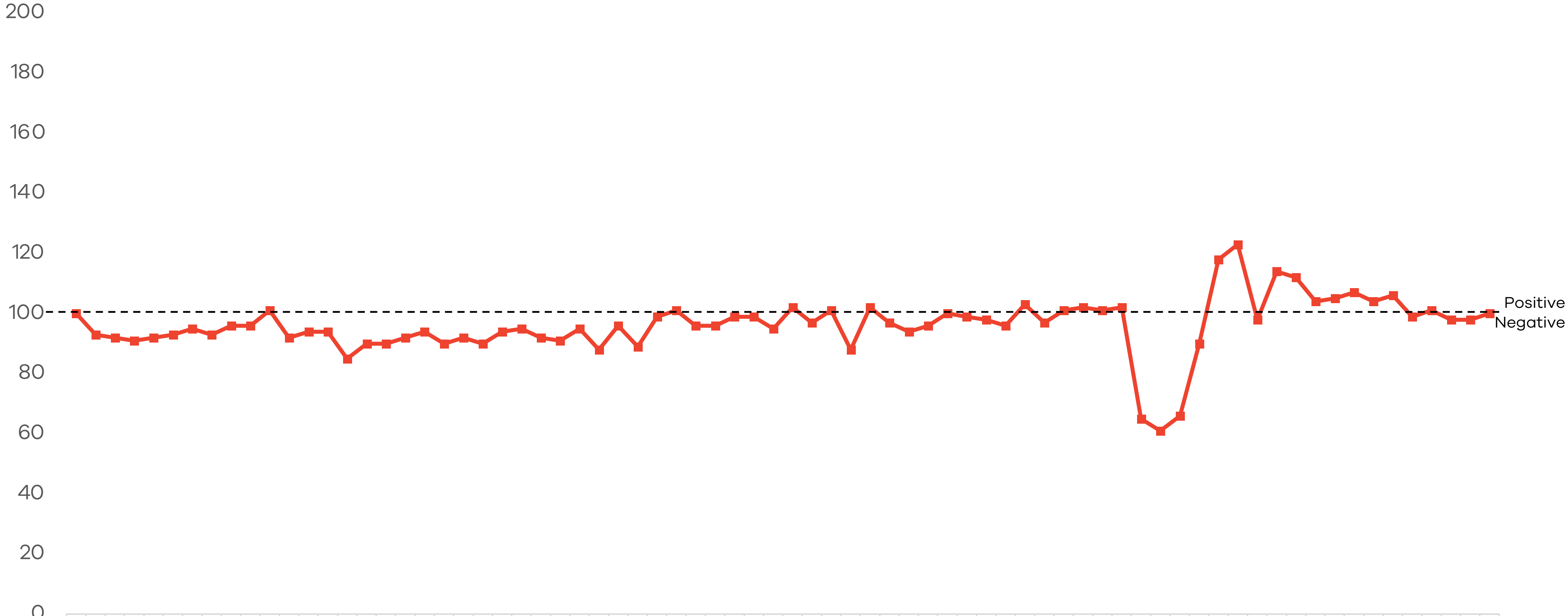
	Mar 07	Apr 07	Jun 07	Aug 07	Oct 07	Dec 07	Feb 08	Apr 08	Jul 08	Oct 08	Feb 09	Apr 09	Jul 09	Oct 09	Feb 10	Apr 10	Jul 10	Oct 10	Feb 11	Apr 11	Jul 11	Oct 11	Feb 12	Apr 12	Jul 12
U.S. Adults	100	97	86	92	94	94	95	82	80	77	85	87	90	90	89	89	80	80	91	85	89	78	91	93	88

	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	Feb 18	Apr 18	Jul 18	Oct 18
U.S. Adults	86	92	103	97	97	99	106	103	104	106	106	106	103	108	107	107	106	102	98	103	102	101	103	97	98

	Feb 19	Apr 19	Jul 19	Oct 19	Feb 20	Apr 20	Jul 20	Oct 20	Feb 21	Apr 21	Jul 21	Oct 21	Feb 22	Apr 22	Jul 22	Oct 22	Feb 23	Apr 23	Aug 23	Oct 23	Feb 24	Apr 24	Jul 24	Oct 24
U.S. Adults	102	97	101	96	102	75	64	76	103	112	115	115	110	105	102	103	100	103	102	103	105	104	105	107

Source: MMGY's 2024 *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
U.S. Adults	100	93	92	91	92	93	95	93	96	96	101	92	94	94	85

	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
U.S. Adults	90	90	92	94	90	92	90	94	95	92	91	95	88	96	89

	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	99	101	96	96	99	99	95	102	97	101	88	102	97	94	96

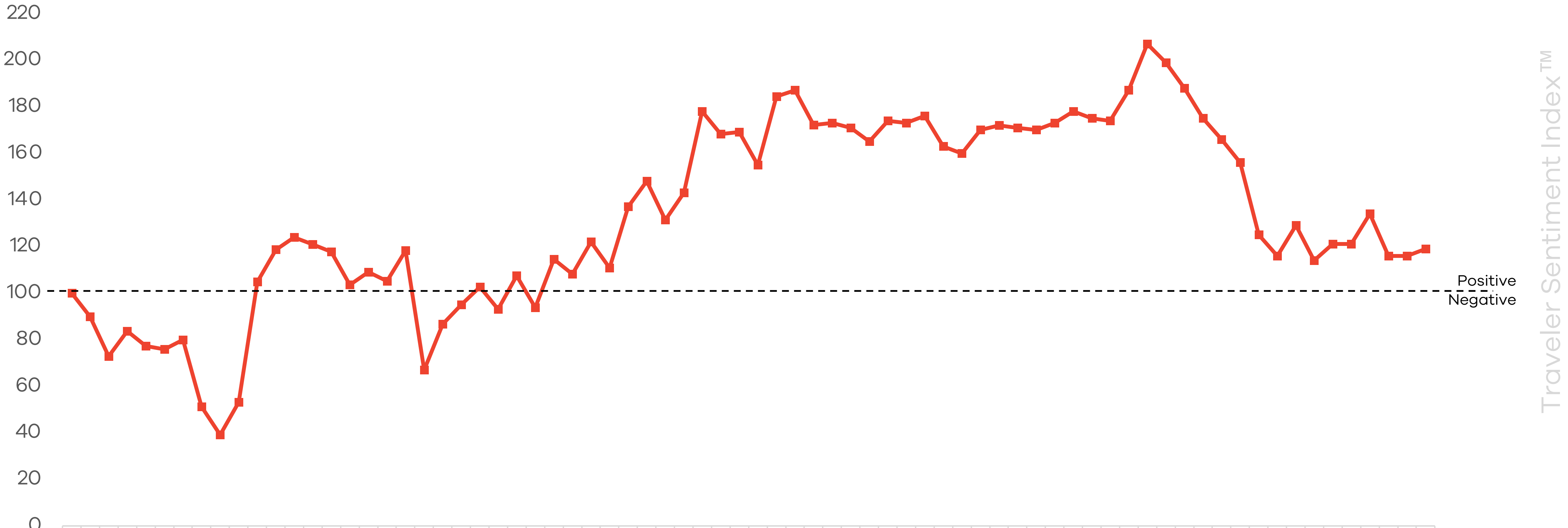
	Oct 17	Feb 18	Apr 18	Jul 18	Oct 18	Feb 19	Apr 19	Jul 19	Oct 19	Feb 20	Apr 20	Jul 20	Oct 20	Feb 21	Apr 21
U.S. Adults	100	99	98	96	103	97	101	102	101	102	65	61	66	90	118

	Jul 21	Oct 21	Feb 22	Apr 22	Jul 22	Oct 22	Feb 23	Apr 23	Aug 23	Oct 23	Feb 24	Apr 24	Jul 24	Oct 24
U.S. Adults	123	98	114	112	104	105	107	104	106	99	101	98	98	100

Traveler Sentiment Index™

Source: MMGY's 2024 *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
U.S. Adults	100	90	73	84	77	76	80	51	39	53	105	119	124	121	118

	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
U.S. Adults	104	109	105	118	67	87	95	103	93	107	94	115	108	122	111

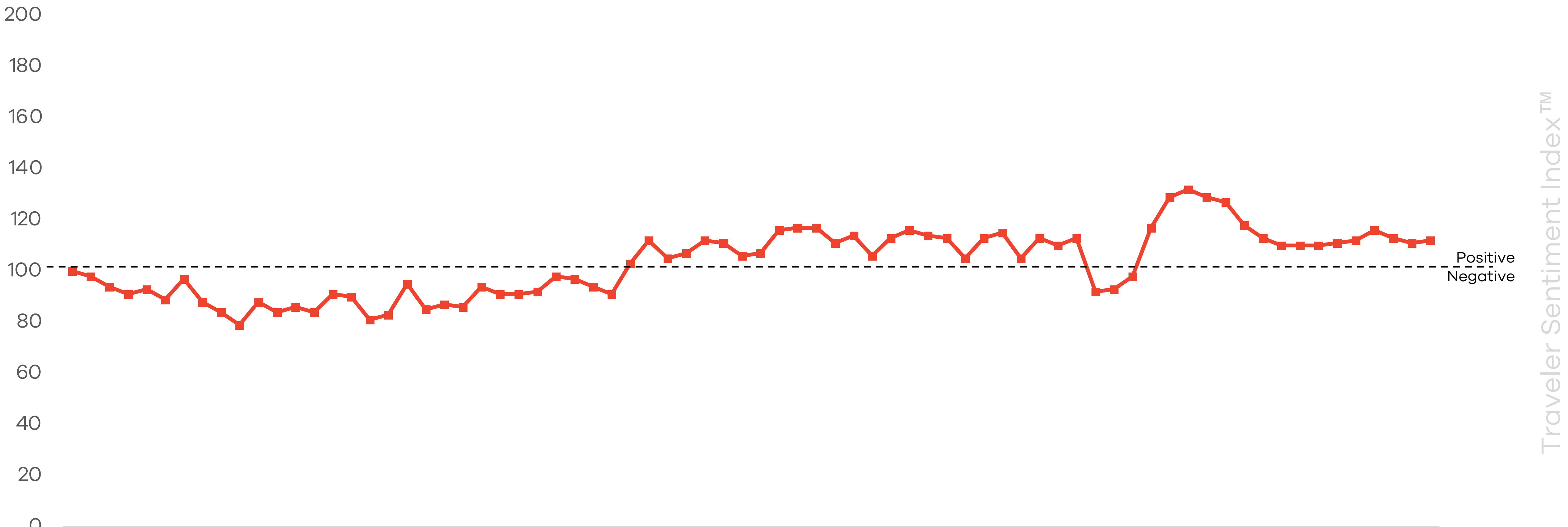
	Feb 14	Apr 14	Jul 14	Oct 14	Feb 15	Apr 15	Jul 15	Oct 15	Feb 16	Apr 16	Jul 16	Oct 16	Feb 17	Apr 17	Jul 17
U.S. Adults	137	148	131	143	178	168	169	155	184	187	172	173	171	165	174

	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
U.S. Adults	173	176	163	160	170	172	171	170	173	178	175	174	187	207	199

	Jul 21	Oct 21	Feb 22	Apr 22	Jul 22	Oct 22	Feb 23	Apr 23	Aug 23	Oct 23	Feb 24	Apr 24	Jul 24	Oct 24
U.S. Adults	188	175	166	156	125	116	129	114	121	121	134	116	116	119

Source: MMGY's 2024 *Portrait of American Travelers®* "Winter Edition"

Index 4: Time Available for Travel



	Mar 07	Apr 07	Jun 07	Aug 07	Oct 07	Dec 07	Feb 08	Apr 08	Jul 08	Oct 08	Feb 09	Apr 09	Jul 09	Oct 09	Feb 10	Apr 10	Jul 10	Oct 10	Feb 11	Apr 11	Jul 11	Oct 11	Feb 12	Apr 12	Jul 12	Oct 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	91	91	92

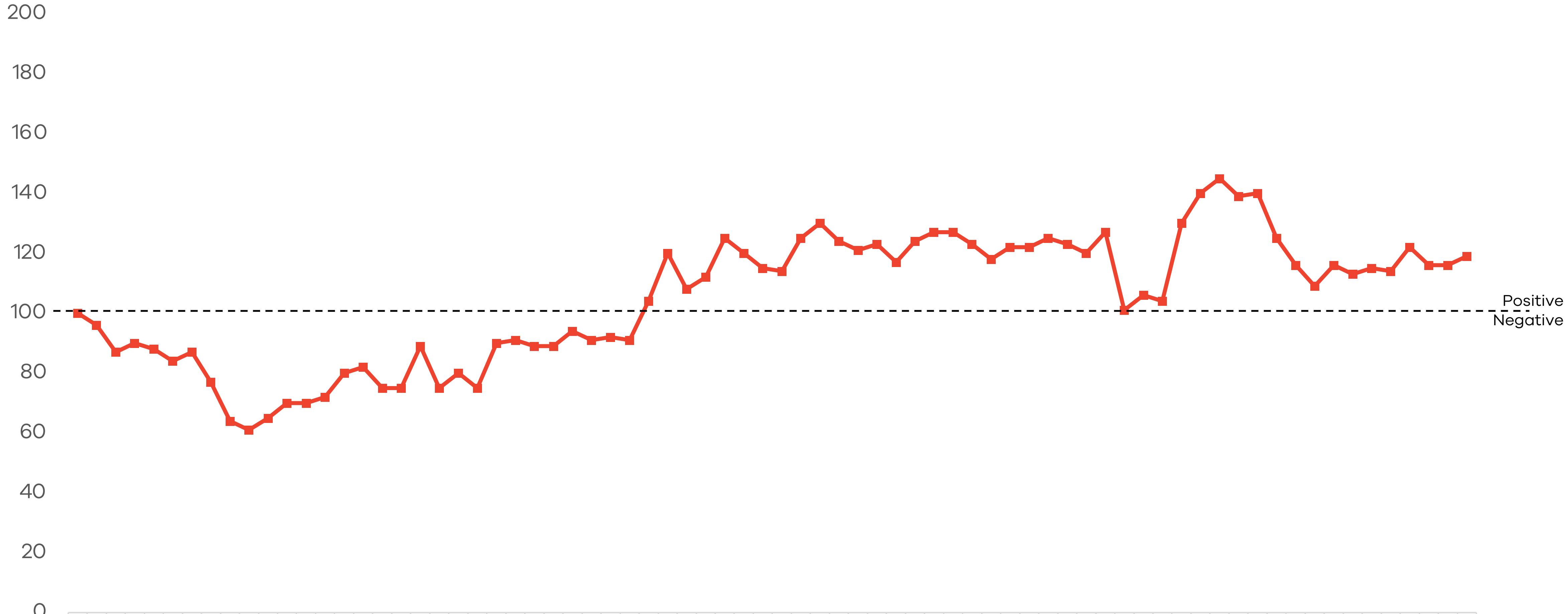
	Feb 13	Apr 13	Jul 13	Oct 13	Feb 14	Apr 14	Jul 14	Oct 14	Feb 15	Apr 15	Jul 15	Oct 15	Feb 16	Apr 16	Jul 16	Oct 16	Feb 17	Apr 17	Jul 17	Oct 17	Feb 18	Apr 18	Jul 18	Oct 18	Feb 19
U.S. Adults	98	97	94	91	103	112	105	107	112	111	106	107	116	117	117	111	114	106	113	116	114	113	105	113	115

	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	Feb 24	Apr 24	Jul 24	Oct 24
U.S. Adults	105	113	110	113	92	93	98	117	129	132	129	127	118	113	110	110	110	111	112	116	113	111	112

Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

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
U.S. Adults	100	96	87	90	88	84	87	77	64	61	65	70	70	72	80

	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
U.S. Adults	82	75	75	89	75	80	75	90	91	89	89	94	91	92	91

	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	104	120	108	112	125	120	115	114	125	130	124	121	123	117	124

	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
U.S. Adults	127	127	123	118	122	122	125	123	120	127	101	106	104	130	140

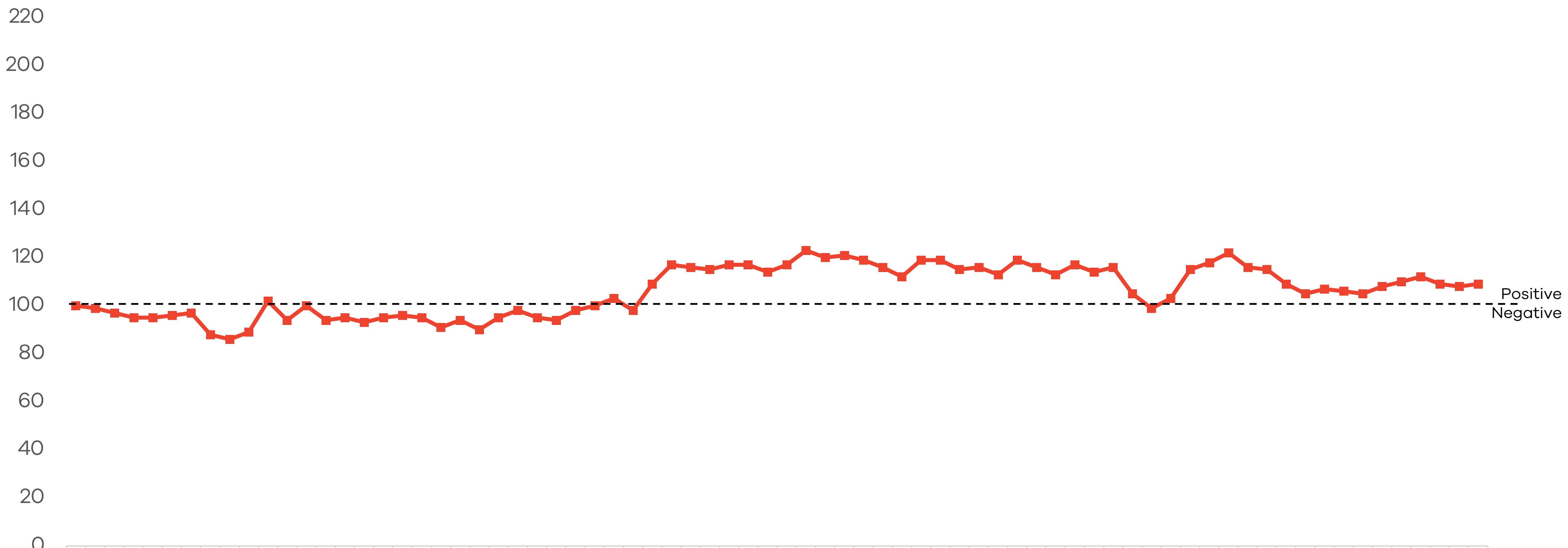
	Jul 21	Oct 21	Feb 22	Apr 22	Jul 22	Oct 22	Feb 23	Apr 23	Aug 23	Oct 23	Feb 24	Apr 24	Jul 24	Oct 24
U.S. Adults	145	139	140	125	116	109	116	113	115	114	122	116	116	119

Traveler Sentiment Index™

 Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Index 6: Quality of Service



	Mar 07	Apr 07	Jun 07	Aug 07	Oct 07	Dec 07	Feb 08	Apr 08	Jul 08	Oct 08	Feb 09	Apr 09	Jul 09	Oct 09	Feb 10	Apr 10	Jul 10	Oct 10	Feb 11	Apr 11	Jul 11	Oct 11	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
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	95	98	95	94	98	100	103	98	109	117	116	115	117	117	114	117

	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	Feb 24	Apr 24	Jul 24	Oct 24
U.S. Adults	123	120	121	119	116	112	119	119	115	116	113	119	116	113	117	114	116	105	99	103	115	118	122	116	115	109	105	107	106	105	108	110	112	109	108	109

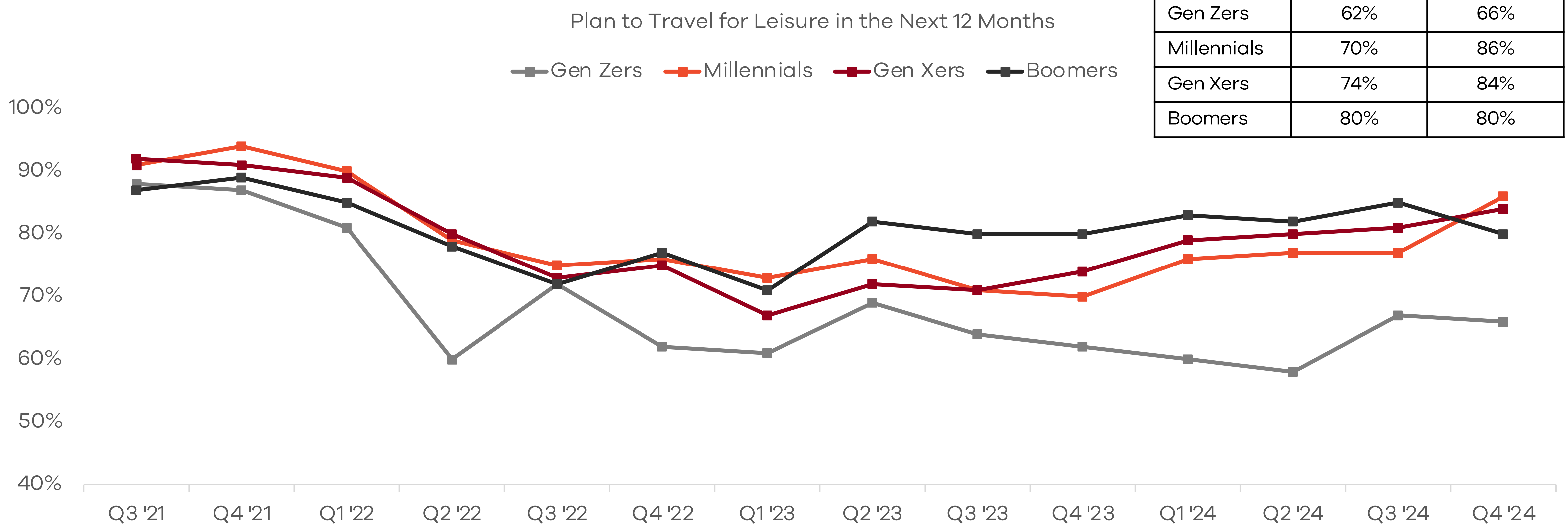
Traveler Sentiment Index™

Source: MMGY's 2024 *Portrait of American Travelers®* "Winter Edition"

MMGY Travel Intelligence

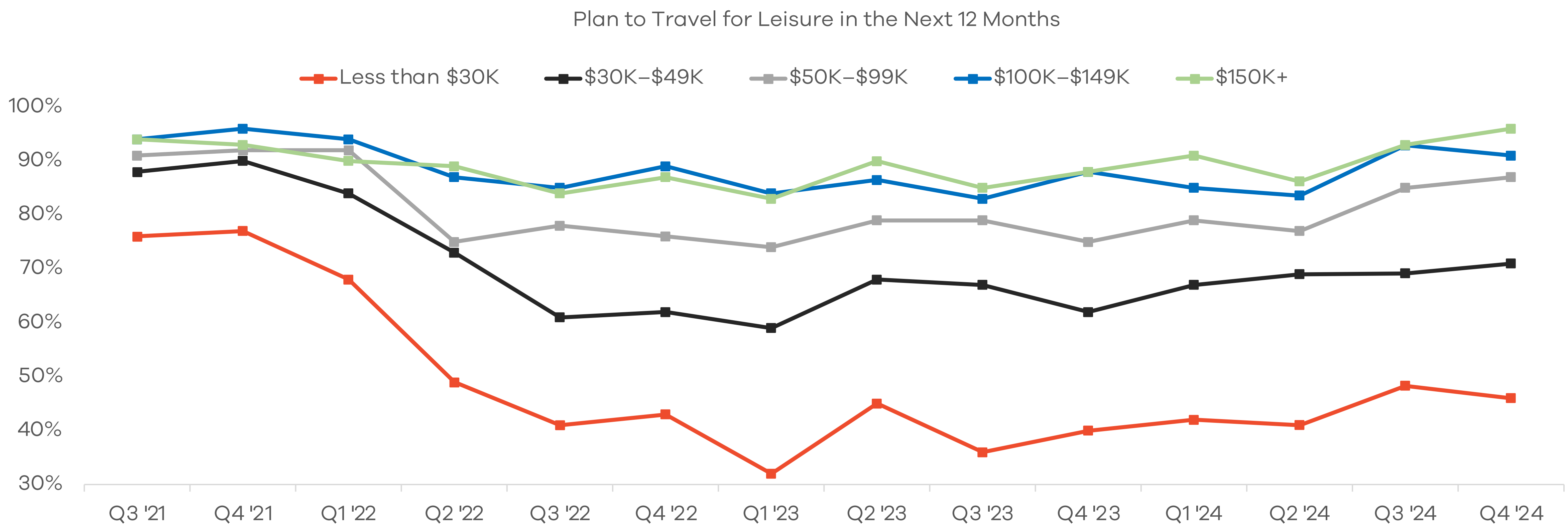
Millennials and Gen Xers have seen significant increases in their intent to travel over the next 12 months.

YOY	Q4 '23	Q4 '24
Gen Zers	62%	66%
Millennials	70%	86%
Gen Xers	74%	84%
Boomers	80%	80%



Base: U.S. adults (Gen Zers: n=584; Millennials: n=1,233; Gen Xers: n=1,132; Boomers: n=1,349)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

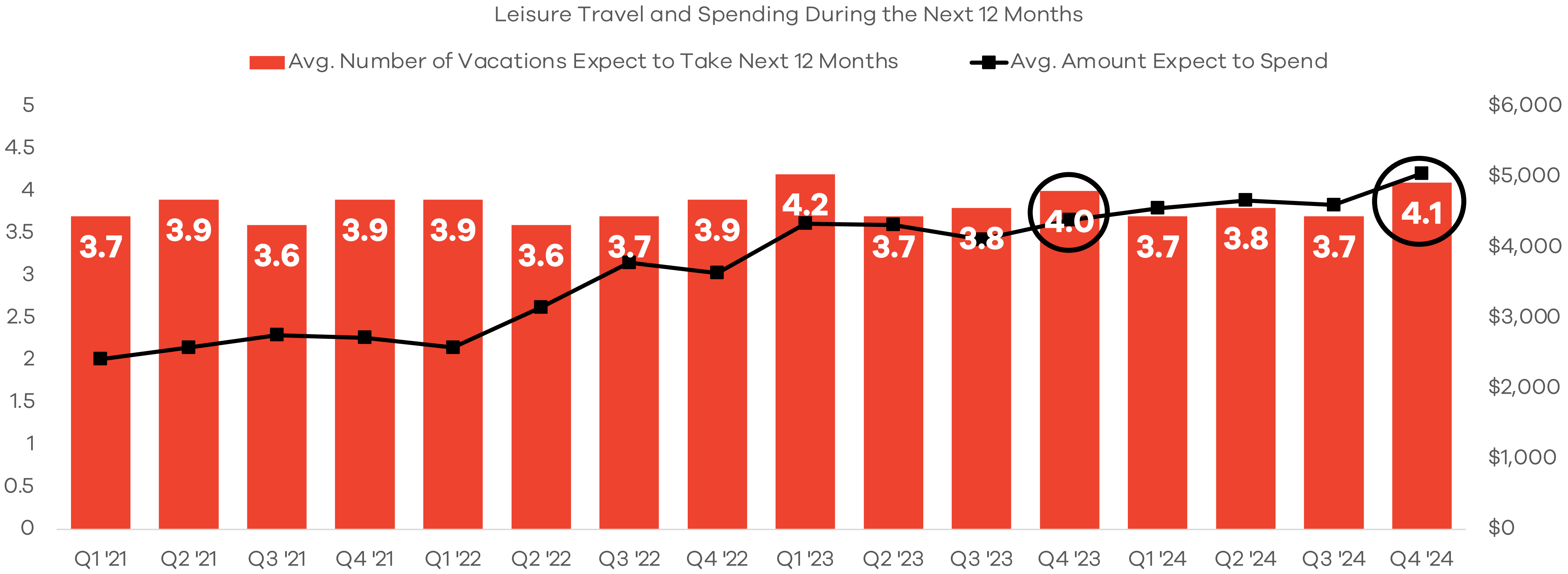
In comparison to Q4 2023, plans for leisure travel have risen across all household income levels.



Base: U.S. adults (Less than $30K: n=730; $30K–$49K: n=603; $50K–$99K: n=1,353; $100K–$149K: n= 875; $150K+: n= 939)

Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

American travelers expect to take more vacations and spend more on those vacations than any time in the past two years.



Base: Active leisure travelers (n=3,633)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

Airline travel and larger vacation budgets are top factors leading to increased spending compared to Q4 2023.

63%

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

Factors That Have Contributed to Increase in Travel Budget	Q4 '23	Q4 '24
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.	56%	57%
I expect to spend more because vacation lodging/accommodations seem to cost more now than they did a few years ago.	52%	52%
I expect to spend more because the price of gas is higher now than it was the past few years.	44%	38%
I expect to spend more because airline travel seems to cost more now than it did a few years ago.	38%	43%
I expect to spend more because I have more reasons I need to travel (e.g., special events, family visits, etc.) in the next 12 months than I have in recent years.	30%	31%
I expect to spend more because I simply have more money available in my budget and this is how I choose to spend it.	25%	30%

Base: Active leisure travelers (n=3,633); 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=2,314)

Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

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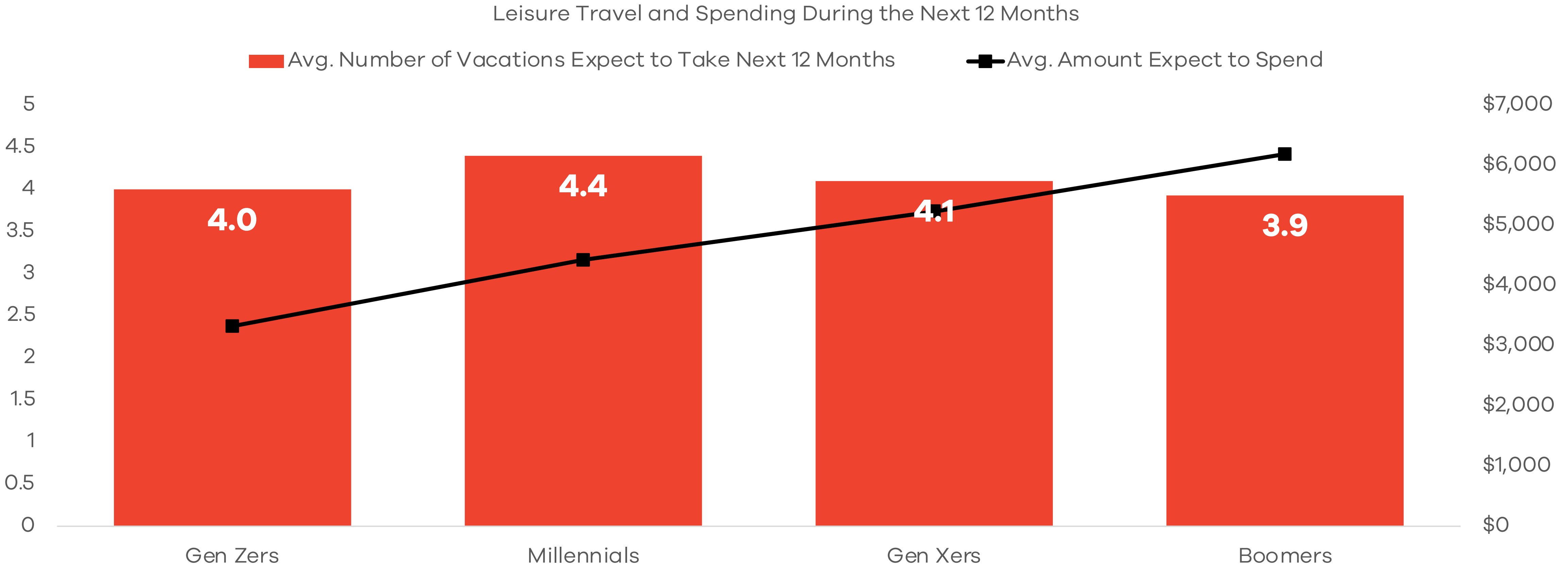
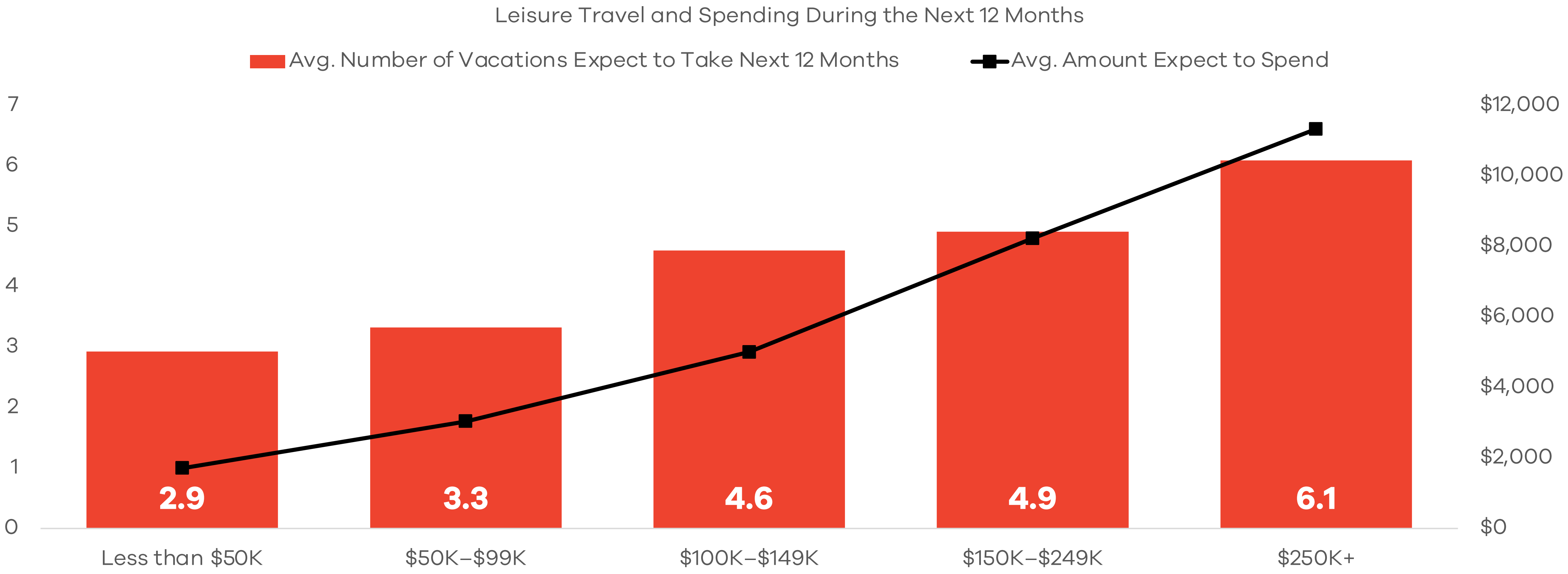
Boomers are planning to spend the most on overnight leisure travel in the next 12 months, while Millennials are planning to take the most trips.



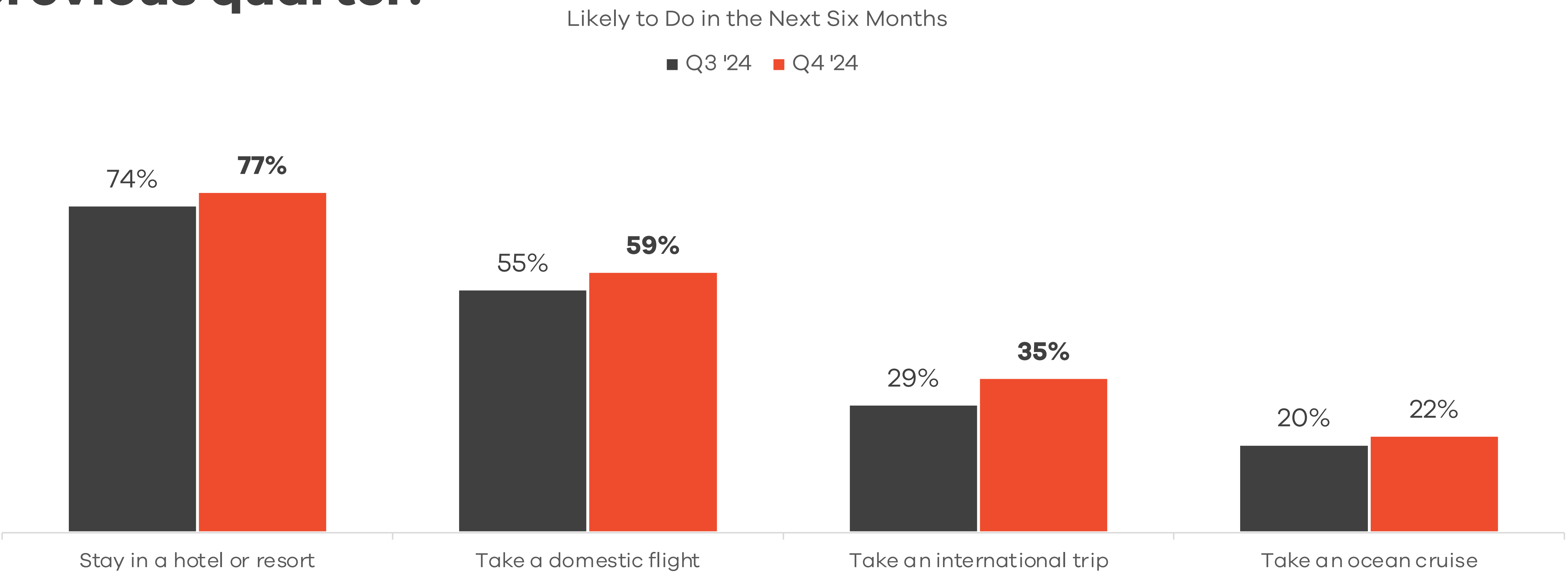
Base: Active leisure travelers (Gen Zers: n=464; Millennials: n=1,121; Gen Xers: n=927; Boomers: n=1,043)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

Travel intentions and vacation spending increase with household income.



Base: Active leisure travelers (Less than $50K: n=763; $50K–$99K: n=1,170; $100K–$149K: n=800; $150K–$249k: n=660; $250k+: n=240)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

American travelers are significantly more likely to stay in a hotel or resort, take a domestic flight, and/or travel internationally in the next six months compared to the previous quarter.



Data in bold indicates a statistically significant difference from Q3 2024.
Base: U.S. adults who plan to vacation during the next six months (n=2,980)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

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Where People Want to Visit

MMGY Travel Intelligence

States Interested in Visiting During the Next Two Years

Rank	Destination	% Interested
1	Hawaii	68%
2	Florida	64%
3	California	**59%** ▲
4	Colorado	57%
5	New York	**55%** ▲
6	Alaska	54%
7	Texas	47%
8	Nevada	46%
9	Arizona	45%
10	North Carolina	43%
11	Tennessee	42%
12	Maine	40%
12	Georgia	40%
14	South Carolina	39%
14	Washington	39%
16	Montana	37%
17	Massachusetts	36%
17	Louisiana	36%
19	Oregon	34%
20	Utah	31%

Rank	Destination	% Interested
20	Pennsylvania	31%
20	New Mexico	31%
23	Vermont	30%
23	Virginia	30%
25	Wyoming	29%
26	Michigan	28%
27	Maryland	27%
27	New Hampshire	27%
27	New Jersey	27%
30	Connecticut	26%
31	Rhode Island	25%
32	Illinois	24%
33	Wisconsin	23%
34	West Virginia	22%
34	Kentucky	22%
34	Alabama	22%
34	South Dakota	22%
38	Minnesota	21%
38	Idaho	21%
40	North Dakota	20%

Rank	Destination	% Interested
40	Missouri	20%
42	Mississippi	19%
42	Ohio	19%
42	Delaware	19%
45	Oklahoma	**17%** ▼
45	Arkansas	17%
47	Nebraska	**16%** ▼
47	Indiana	16%
47	Kansas	16%
50	Iowa	14%

▲ Displayed a statistically significant increase compared to Q4 2023

▼ Displayed a statistically significant decrease compared to Q4 2023

Base: Active leisure travelers (n=3,633)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Destinations Interested in Visiting During the Next Two Years

Rank	Destination	% Interested
1	Island of Hawaii	**61%** ▲
2	Maui, HI	**60%** ▲
2	Honolulu, HI	**60%** ▲
4	Las Vegas, NV	57%
5	Kauai, HI	56%
6	Florida Keys/Key West, FL	55%
7	New York City, NY	**52%** ▲
8	Orlando, FL	49%
8	New Orleans, LA	49%
10	Lanai, HI	48%
10	San Diego, CA	**48%** ▲
12	Niagara Falls, NY	47%
12	Nashville, TN	47%
14	San Francisco, CA	**46%** ▲
15	Los Angeles, CA	**45%** ▲
15	Miami, FL	**45%** ▲
17	Washington, D.C.	**44%** ▲
17	Denver, CO	44%
19	Tampa/St. Petersburg/Clearwater, FL	**43%** ▼
20	Napa Valley, CA	42%
20	Boston, MA	**42%** ▲
20	Palm Beach, FL	**42%** ▼
23	Myrtle Beach, SC	41%

Rank	Destination	% Interested
23	Charleston, SC	41%
25	Palm Springs, CA	39%
25	Aspen, CO	39%
25	Seattle, WA	39%
25	Phoenix/Scottsdale, AZ	39%
25	Fort Lauderdale, FL	**39%** ▼
25	Austin, TX	39%
25	Hilton Head Island, SC	39%
32	Sedona, AZ	37%
32	Panama City Beach, FL	**37%** ▼
32	St. Augustine, FL	37%
32	Daytona Beach, FL	**37%** ▼
36	Dallas, TX	36%
36	San Antonio, TX	36%
36	Fort Myers/Sanibel/Captiva, FL	36%
39	Outer Banks, NC	35%
39	Gatlinburg/Pigeon Forge, TN	35%
41	Chicago, IL	34%
41	Charlotte, NC	34%
43	Portland, OR	33%
43	Houston, TX	**33%** ▼
43	Anaheim, CA	33%
43	Atlanta, GA	33%

Rank	Destination	% Interested
43	Jackson Hole, WY	33%
43	Sonoma County, CA	33%
49	Tucson, AZ	32%
49	Virginia Beach, VA	32%
49	Vail, CO	32%
49	Santa Fe, NM	32%
49	Asheville, NC	32%
54	Salt Lake City, UT	31%
55	Philadelphia, PA	30%
55	San Jose, CA	30%
57	Albuquerque, NM	28%
58	Park City, UT	27%
58	Raleigh/Durham, NC	27%
60	Winston-Salem, NC	26%
60	Greenville, SC	26%
62	Corpus Christi, TX	**25%** ▼
63	Wilmington, NC	24%
63	Branson, MO	24%
65	St. Louis, MO	22%
66	Minneapolis, MN	21%
66	Shreveport, LA	**21%** ▼
68	Detroit, MI	20%
68	Kansas City, MO	20%
70	Ann Arbor, MI	19%
71	Cleveland, OH	18%

Data in bold indicates a statistically significant difference from Q4 2023.
Base: Active leisure travelers (n=3,633)
Source: MMGY's 2024 *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		Millennials		Gen Xers		Boomers	
1	Los Angeles, CA	1	Honolulu, HI	1	Honolulu, HI	1	Island of Hawaii
2	Island of Hawaii	1	Maui, HI	1	Maui, HI	2	Maui, HI
3	Las Vegas, NV	3	Island of Hawaii	1	Island of Hawaii	3	Honolulu, HI
3	New Orleans, LA	4	Las Vegas, NV	4	Las Vegas, NV	4	Kauai, HI
3	Miami, FL	4	New York City, NY	5	Kauai, HI	5	Florida Keys/Key West, FL
6	New York City, NY	6	Kauai, HI	6	Florida Keys/Key West, FL	6	Las Vegas, NV
7	Honolulu, HI	7	Orlando, FL	7	New York City, NY	7	Nashville, TN
7	Orlando, FL	7	Florida Keys/Key West, FL	8	Orlando, FL	8	New Orleans, LA
9	Maui, HI	9	Los Angeles, CA	8	Lanai, HI	9	Lanai, HI
10	Niagara Falls, NY	9	Miami, FL	10	Niagara Falls, NY	10	New York City, NY
10	San Francisco, CA						

Base: Active leisure travelers (Gen Zers: n=464; Millennials: n=1,121; Gen Xers: n=927; Boomers: n=1,043)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence


Winter Module
Online Travel Agencies
MMGY Travel Intelligence

Online Travel Agency Usage

76% Q4 '23

77% Q4 '24

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

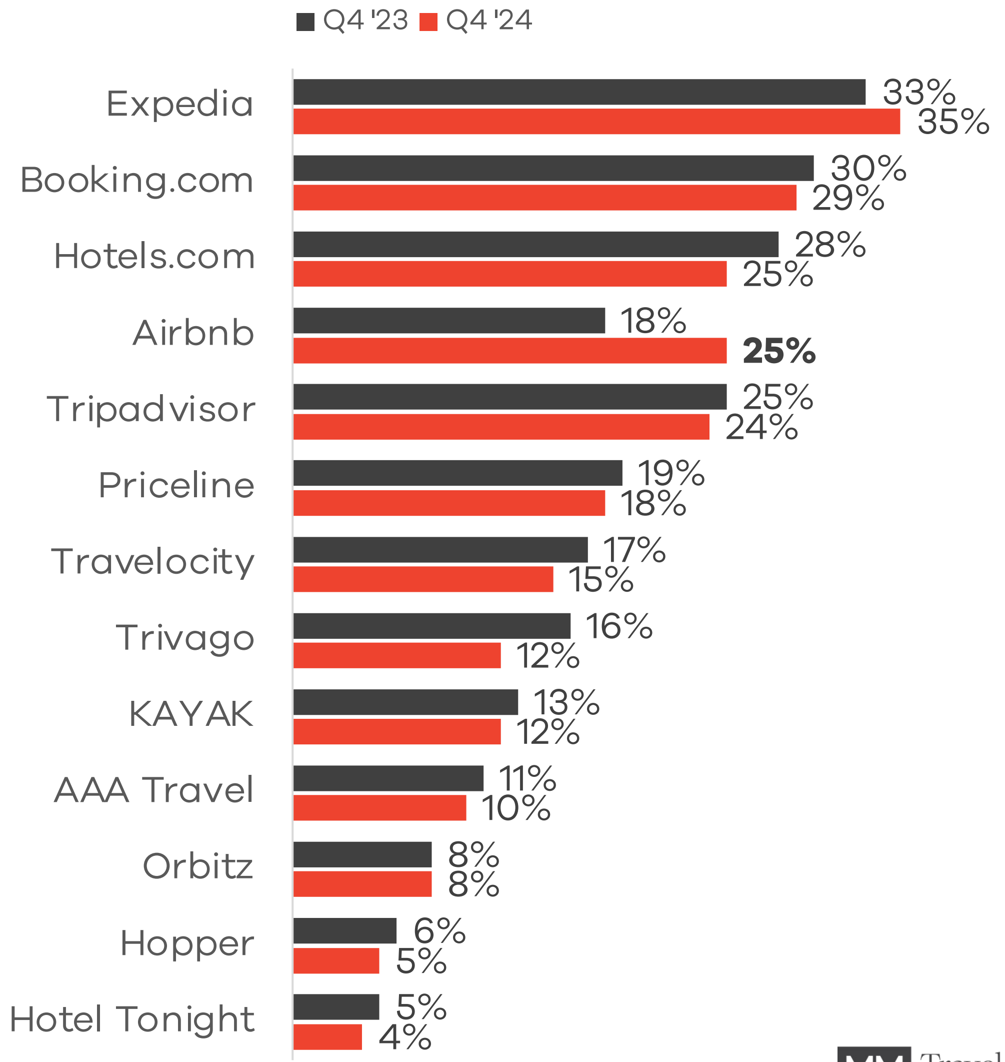
/ More younger travelers and travelers with kids visit OTAs when researching and booking travel.

Gen Zers: **86%**
Millennials: **87%**
Gen Xers: 79%
Boomers: 63%

Have Kids in Household: **88%**
Don't Have Kids in Household: 72%

Less Than $100K: 76%
$100K or More: 78%

OTAs Visited When Researching or Booking Travel

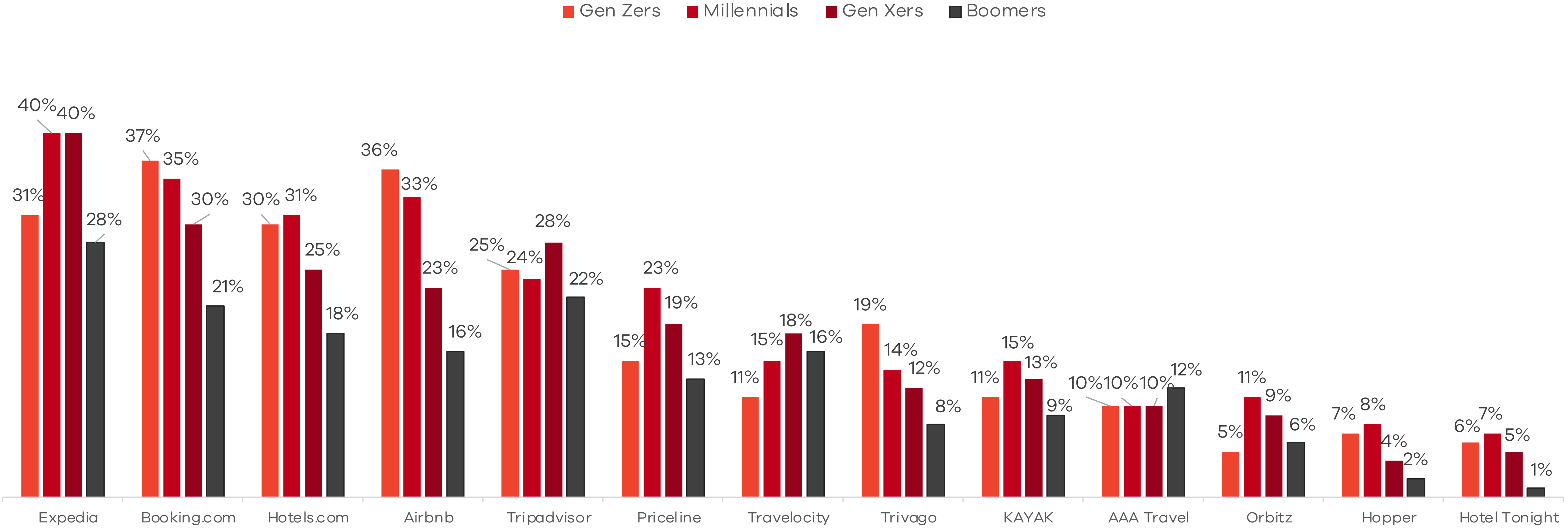


Key results in red.
Data in bold indicates a statistically significant difference from Q4 2023.
Base: Active leisure travelers (n=3,633)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Online Travel Agency Usage by Generation

/ Expedia is the top platform for Millennials and Gen Xers, while Gen Zers use Booking.com and Airbnb more than any other generation. Boomers are the least likely to use online travel agencies overall.

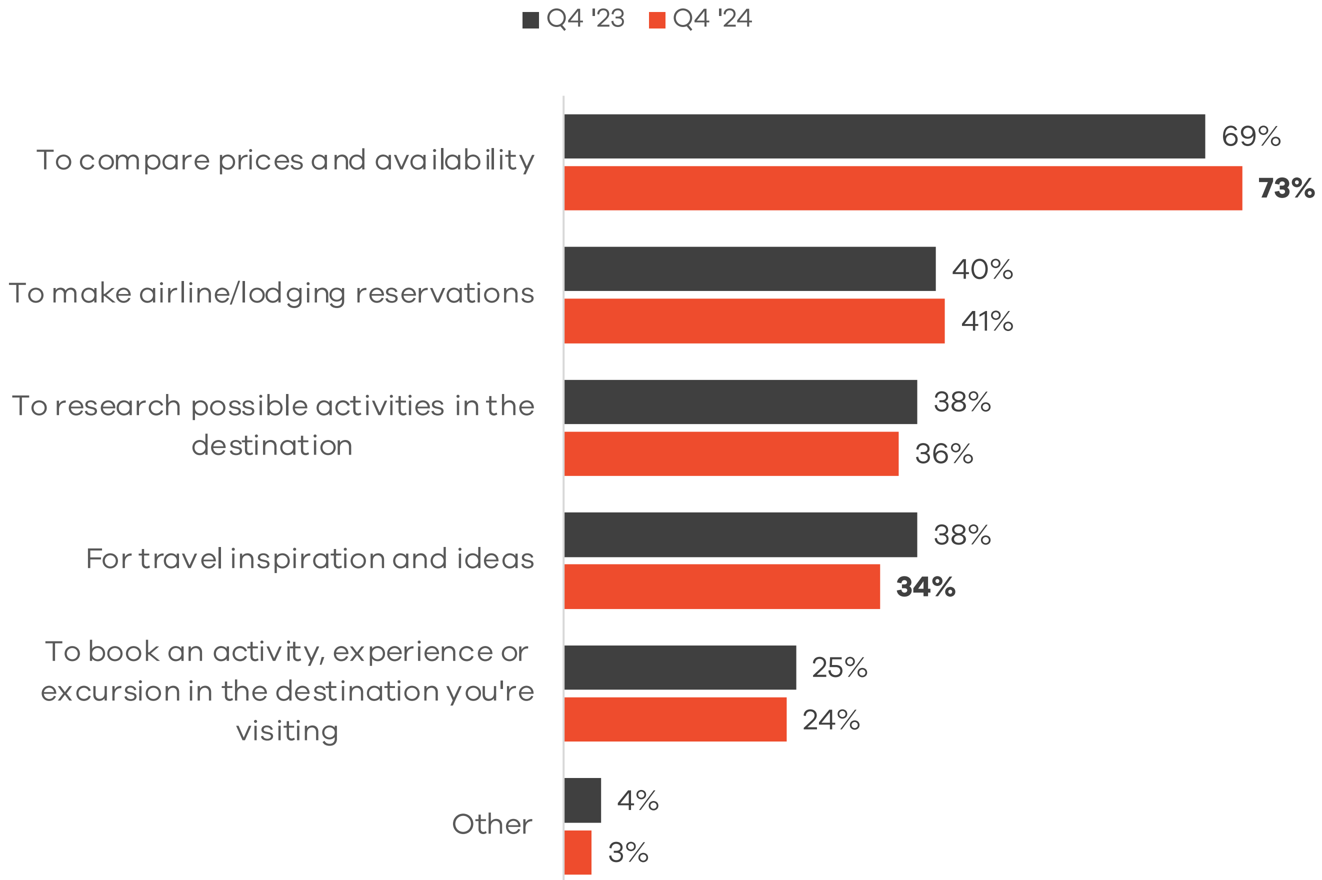


Base: Active leisure travelers (Gen Zers: n=464; Millennials: n=1,121; Gen Xers: n=927; Boomers: n=1,043)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Significantly more active leisure travelers are using OTAs to compare prices and availability in 2024.

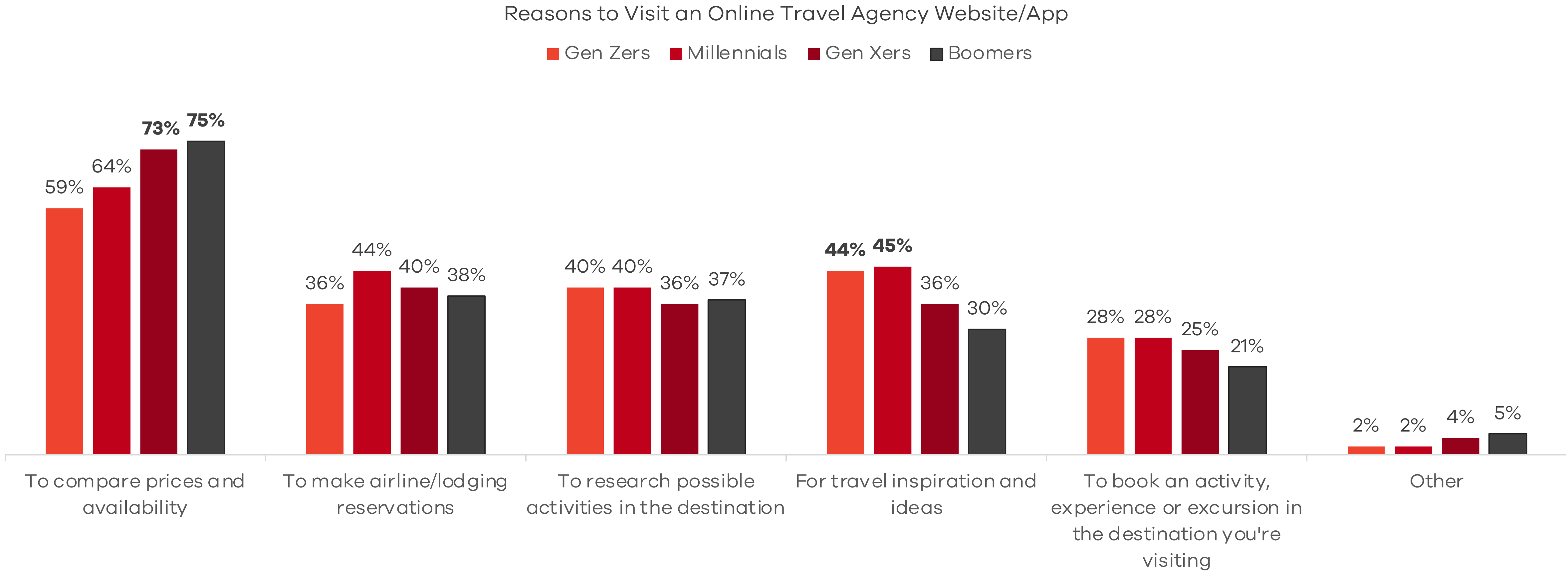
Reasons to Visit an Online Travel Agency Website/App



Data in bold indicates a statistically significant difference from Q4 '23.
Base: Active leisure travelers who use OTAs (n=2,872)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

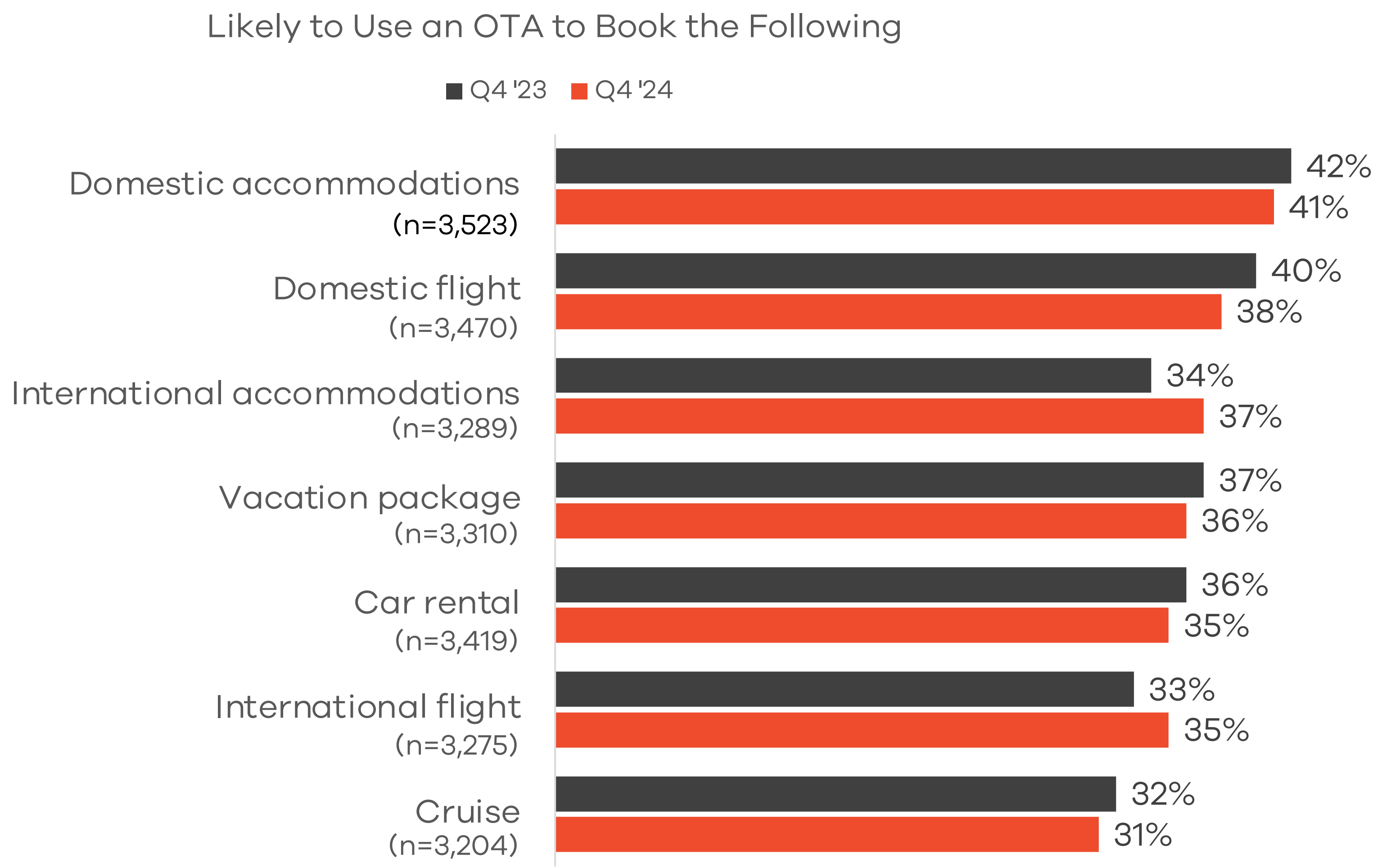
MMGY Travel Intelligence

Younger generations are most likely to visit OTAs for travel inspiration and ideas than older travelers.



Data in bold indicates a statistically significant difference from other generational groups.
Base: Active leisure travelers who use OTAs (Gen Zers: n=402; Millennials: n=986; Gen Xers: n=758; Boomers: n=688)
Source: MMGY's 2024 *Portrait of American Travelers®* "Winter Edition"

OTAs are most frequently used to book domestic accommodations and domestic flights.



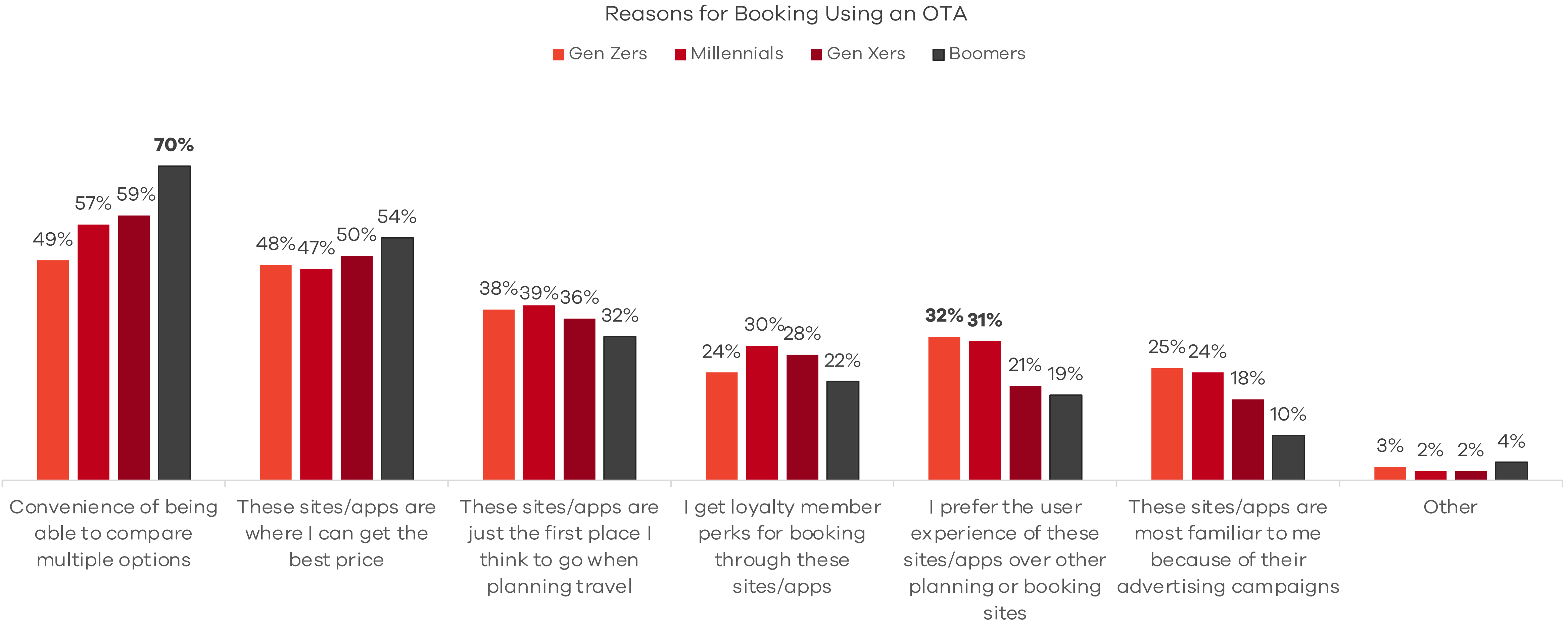
Base: Active leisure travelers planning to book each type of travel
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

Reasons for Booking Using an OTA

	Q4 '23	Q4 '24
Convenience of being able to compare multiple options	60%	59%
These sites/apps are where I can get the best price	53%	50%
These sites/apps are just the first place I think to go when planning travel	37%	36%
I prefer the user experience of these sites/apps over other planning or booking sites	28%	26%
I get loyalty member perks for booking through these sites/apps	26%	27%
These sites/apps are most familiar to me because of their advertising campaigns	24%	**19%**
Other	2%	2%

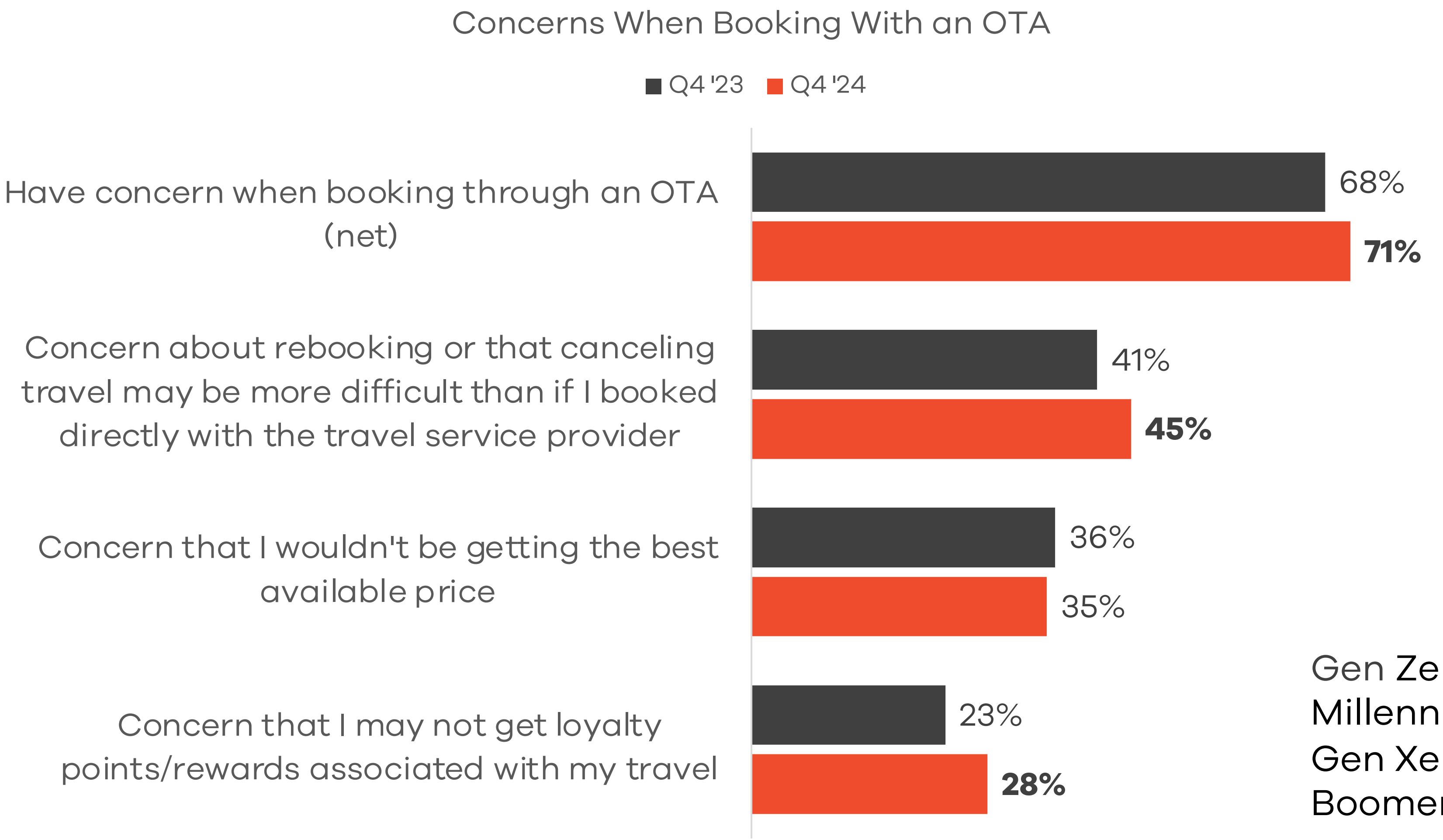
Data in bold indicates a statistically significant difference from Q4 '23.
Base: Active leisure travelers who are likely to book using an OTA (n=2,210)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

Older generations are more likely to book through OTAs for convenience and lower prices, while younger generations are more influenced by the user experience and familiar advertising campaigns.



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=324; Millennials: n=800; Gen Xers: n=577; Boomers: n=482)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

Seven in 10 (71%) active leisure travelers have at least one of the following concerns when booking with an OTA.

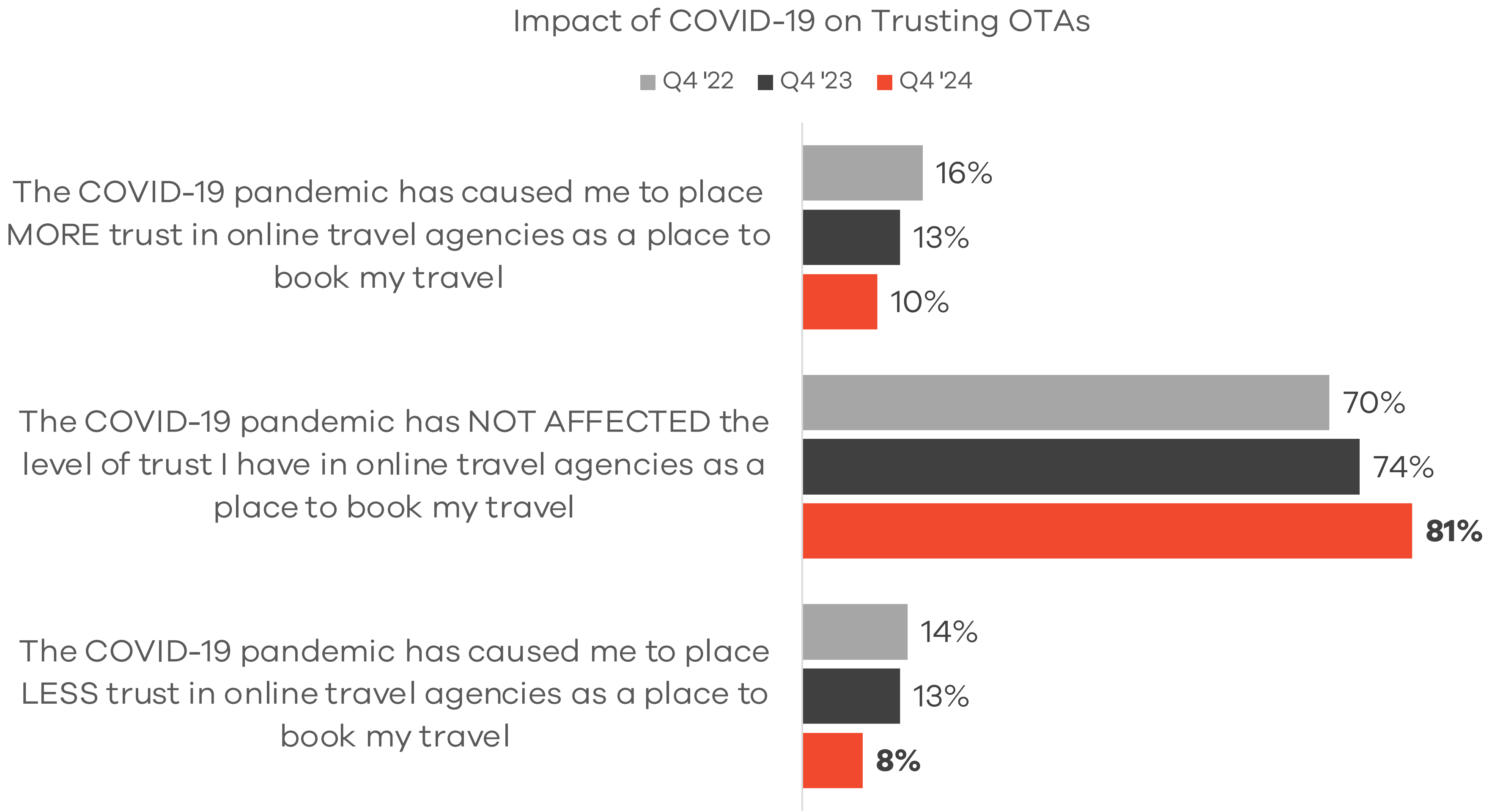


- / Concerns around booking through an OTA have increased 3% overall from 2023.
- / The difficulties of canceling or rebooking travel through an OTA and concerns around loyalty points have seen a statistically significant increase from 2023.
- / Boomers are the least concerned about booking with an OTA, while Gen Zers are the most concerned.

Gen Zers: 79%
Millennials: 74%
Gen Xers: 72%
Boomers: 63%

Data in bold indicates a statistically significant difference from Q4 '23.
Base: Active leisure travelers (n=3,633)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

The pandemic continues to become less relevant to travelers' decision-making, especially in relation to OTAs.



Data in bold indicates a statistically significant difference from Q4 '23.
Base: Active leisure travelers (n=3,633)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

Winter Module

Brand Loyalty

MMGY Travel Intelligence

Marriot International and Hilton Worldwide have seen significant increases in consideration from 2023.

Hotels Would Consider Booking Within Next Two Years	Q4 '23	Q4 '24
Hilton Worldwide (Net)	65%	**71%**
Hilton	47%	**54%**
Hilton Garden Inn	31%	**37%**
Hampton	31%	32%
DoubleTree	23%	23%
Marriott International (Net)	61%	**65%**
Marriott	49%	**55%**
Sheraton	21%	23%
Fairfield Inn	17%	18%
Ritz-Carlton	13%	16%
Gaylord Hotels	6%	6%
Choice Hotels (Net)	38%	36%
Comfort Inn	30%	27%
Radisson	16%	15%
Other hotels		
Holiday Inn	40%	40%
Hyatt	29%	**36%**
Best Western	29%	28%
Wyndham	26%	28%
Disney Hotels and Resorts	14%	**18%**
Four Seasons	15%	17%
Red Lion Hotels	7%	5%
None of the above	5%	4%

/ **Hilton Worldwide and Marriott International have grown their market share.** With a 6% and 4% growth in consideration from 2023, these hotels and their subsidiaries are the top choice for two-thirds of active leisure travelers.

/ **Hyatt and Disney Hotels and Resorts have seen significant increases in interest from 2023.** These brands have seen a 7% and 4% increase in interest from 2023, with other hotels outside of Hilton and Marriott struggling to grow their consideration among active leisure travelers.

Data in bold indicates a statistically significant difference from Q4 '23.
Base: Active leisure travelers (n=3,633)
Source: MMGY's 2024 *Portrait of American Travelers®* "Winter Edition"

MMGY Travel Intelligence

American Airlines, United and British Airways have all seen significant increases in booking consideration from 2023.

Airlines Would Consider Booking Within Next Two Years	Q4 '23	Q4 ' 24
American Airlines	52%	**56%**
Delta	50%	**53%**
United	46%	**50%**
Southwest	47%	48%
JetBlue	23%	24%
Alaska Airlines	17%	20%
British Airways	12%	**16%**
Frontier Airlines	14%	13%
Spirit Airlines	13%	13%
Air Canada	10%	11%
Virgin Atlantic	9%	11%
Lufthansa	8%	11%

/ **Similar to the hotel chains, the biggest airlines have seen the biggest growth in consideration.** American Airlines and United have both seen significant increases in booking consideration, with smaller airlines struggling to replicate these high levels of growth.

/ **Traveler loyalty to airlines is at a three-year high.** Leisure travelers will enjoy the benefits that come with brand loyalty, especially air miles, and look to book with the same brand wherever possible and practical.

Data in bold indicates a statistically significant difference from Q4 '23.
Base: Active leisure travelers (n=3,633)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

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

44%

a Hotel Brand
(compared to 43% in Q4 '23
and 44% in Q4 '22)

49%

an Airline
(compared to 44% in Q4 '23
and 45% in Q4 '22)

26%

a Cruise Line
(compared to 27% in Q4 '23
and 30% in Q4 '22)

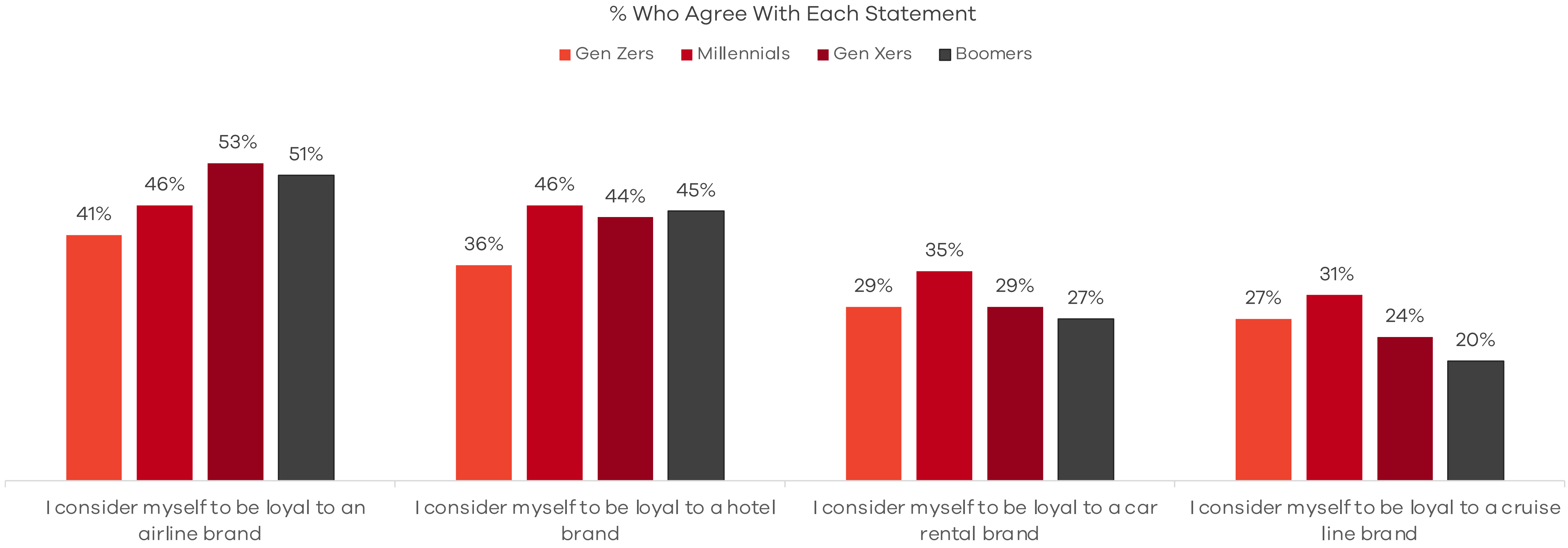
30%

a Car Rental Brand
(compared to 32% in Q4 '23
and 31% in Q4 '22)

Base: Active leisure travelers (n=3,633)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Gen Zers are the least loyal to most brands, while Millennials are the most loyal to hotel and car rental brands.



Base: Active leisure travelers (Gen Zers: n=464; Millennials: n=1,121; Gen Xers: n=927; Boomers: n=1,043)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Hotel Loyalty Programs

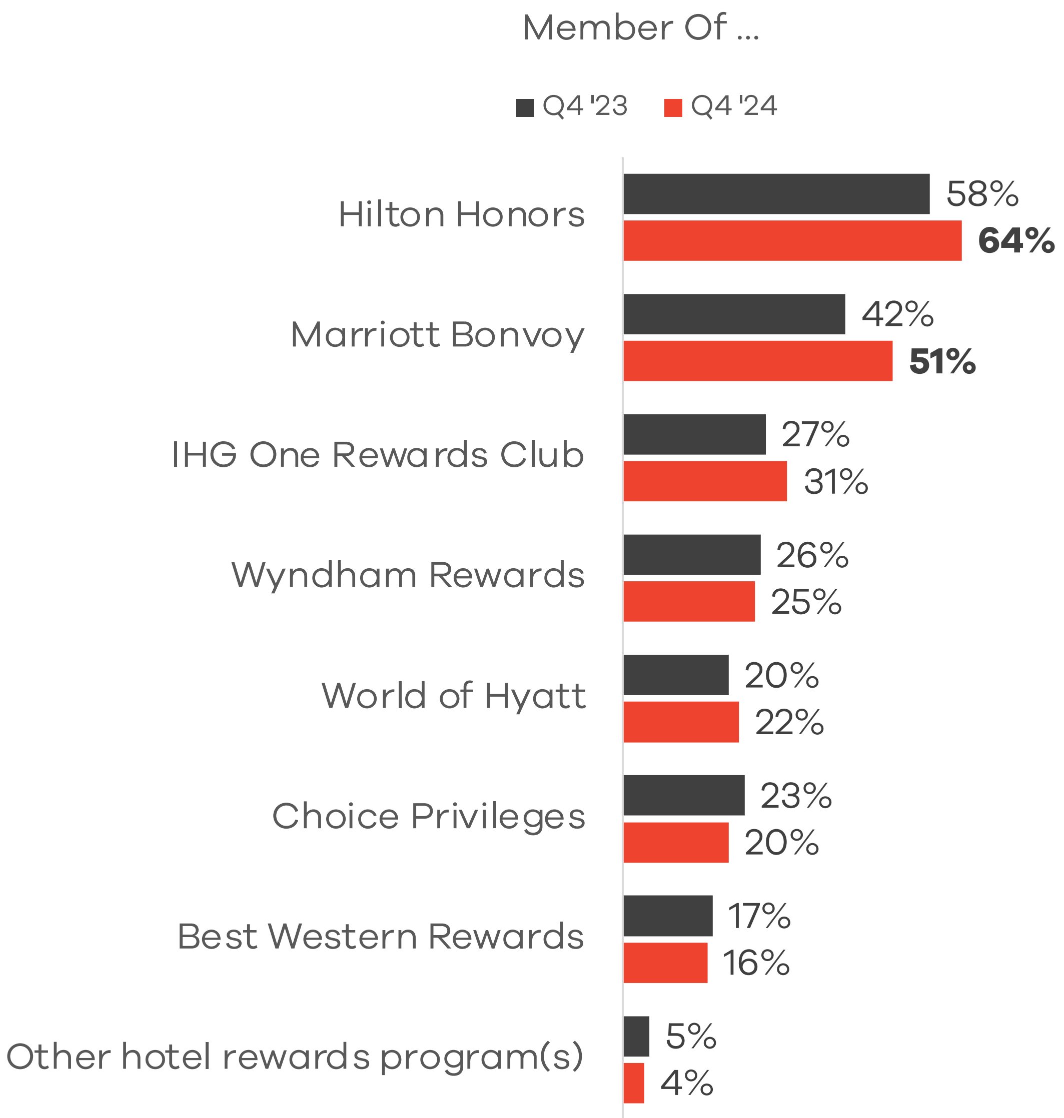
51% Q4 '23 **57%** Q4 '24

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

Gen Zers: 36%
Millennials: **57%** (+11% from 2023)
Gen Xers: **63%** (+16% from 2023)
Boomers: 61%

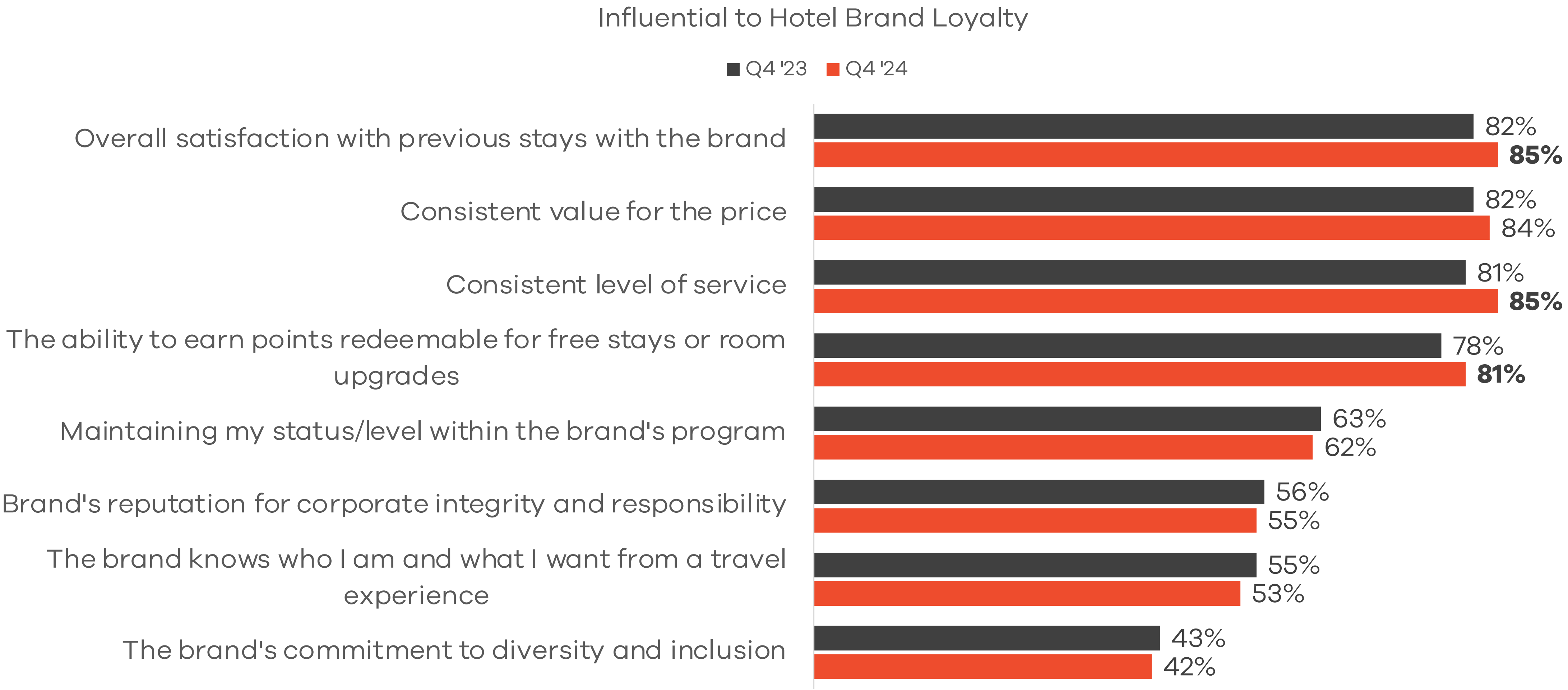
Have Kids in Household: 59%
Don't Have Kids in Household: 56%

Less Than $100K: 42%
$100K or More: **71%** (+10% from 2023)



Key results in red.
Data in bold indicates a statistically significant difference from Q4 '23.
Base: Active leisure travelers (n=3,633); Active leisure travelers who are members of a hotel loyalty program (n=2,173)
Source: MMGY's 2024 *Portrait of American Travelers®* "Winter Edition"

Overall satisfaction with previous stays, consistent levels of service and the ability to earn points have become significantly more important for travelers compared to 2024.



Data in bold indicates a statistically significant difference from Q4 '23.
Base: Active leisure travelers who are members of a hotel loyalty program (n=2,173)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

Airline Frequent Flyer Programs

47% Q4 '23

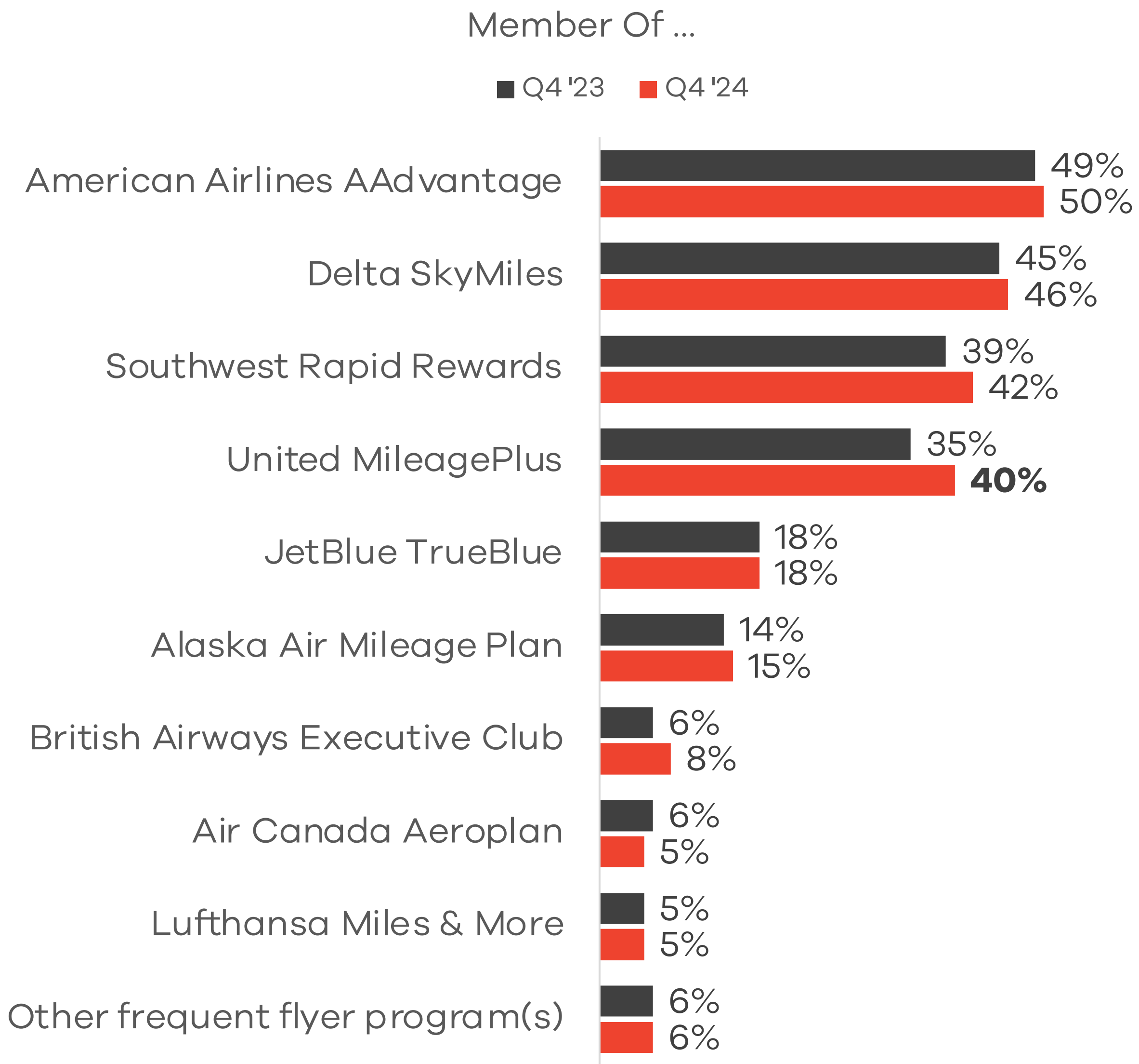
55% Q4 '24

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

Gen Zers: 36%
Millennials: **54%** (+16% from 2023)
Gen Xers: **59%** (+18% from 2023)
Boomers: 62%

Have Kids in Household: 53% (+11% from 2023)
Don't Have Kids in Household: 56% (+7% from 2023)

Less Than $100K: 38% (+6% from 2023)
$100K or More: **71%** (+10% from 2023)



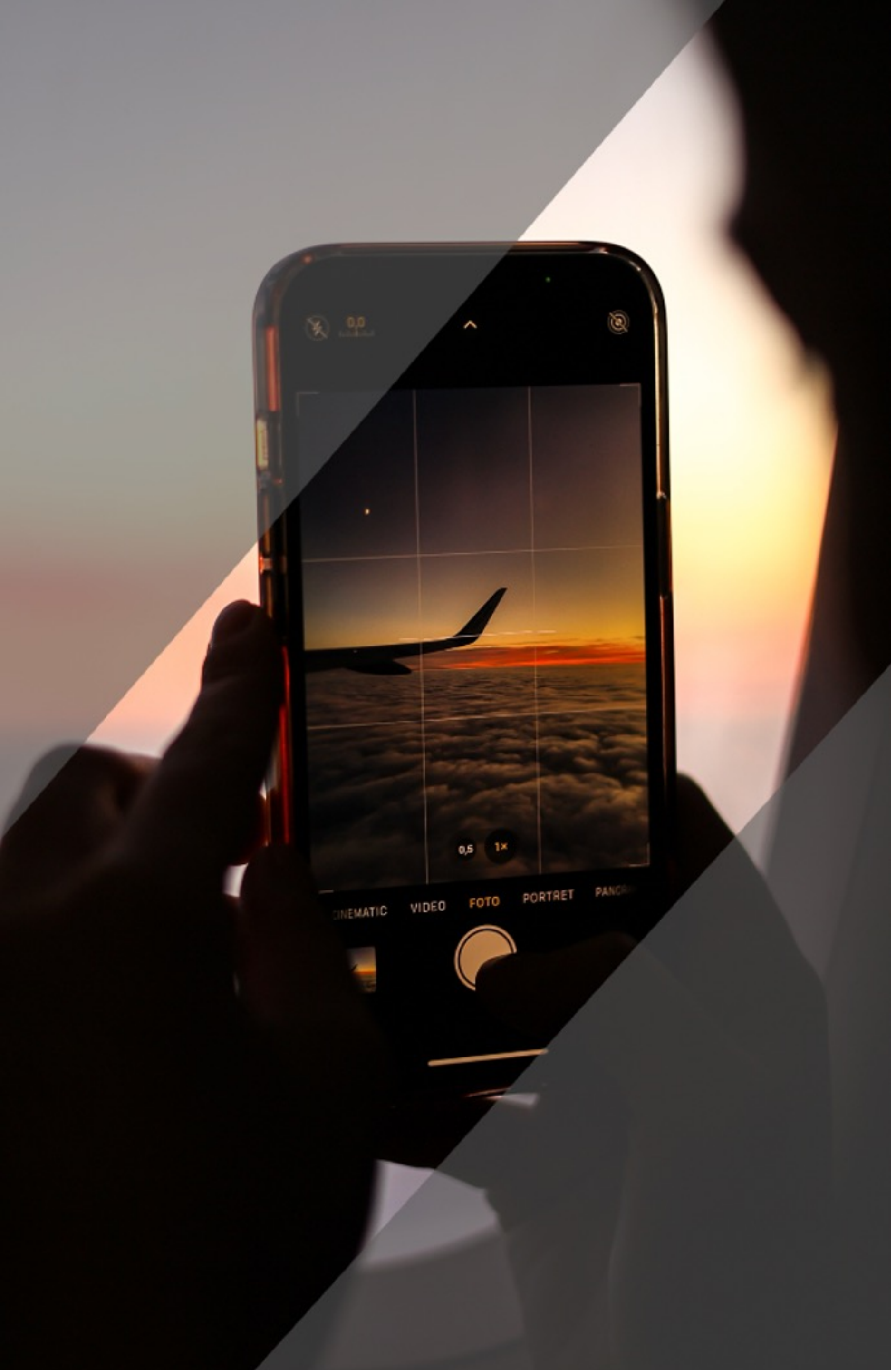
Key results in red.
Data in bold indicates a statistically significant difference from Q4 '23.
Base: Active leisure travelers (n=3,633); active leisure travelers who are members of a frequent flyer program (n=1,977)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

The ability to earn redeemable points has become significantly more important in 2024 and drives airline loyalty to the same extent as satisfaction with previous flight experiences.

Data in bold indicates a statistically significant difference from Q4 '23.
Base: Active leisure travelers who are members of a frequent flyer program (n=1,977)
Source: MMGY's 2022 *Portrait of American Travelers*® "Winter Edition"


Winter Module
Social Media Habits
MM GY Travel Intelligence



Almost 9 in 10 (89%) active leisure travelers have a personal page or profile on social media.

85% Q4 '23 **89%** Q4 '24 ▲

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

Gen Zers: **99%**
Millennials: **97%**
Gen Xers: 91%
Boomers: 76%

Have Kids in Household: **97%**
Don't Have Kids in Household: 85%

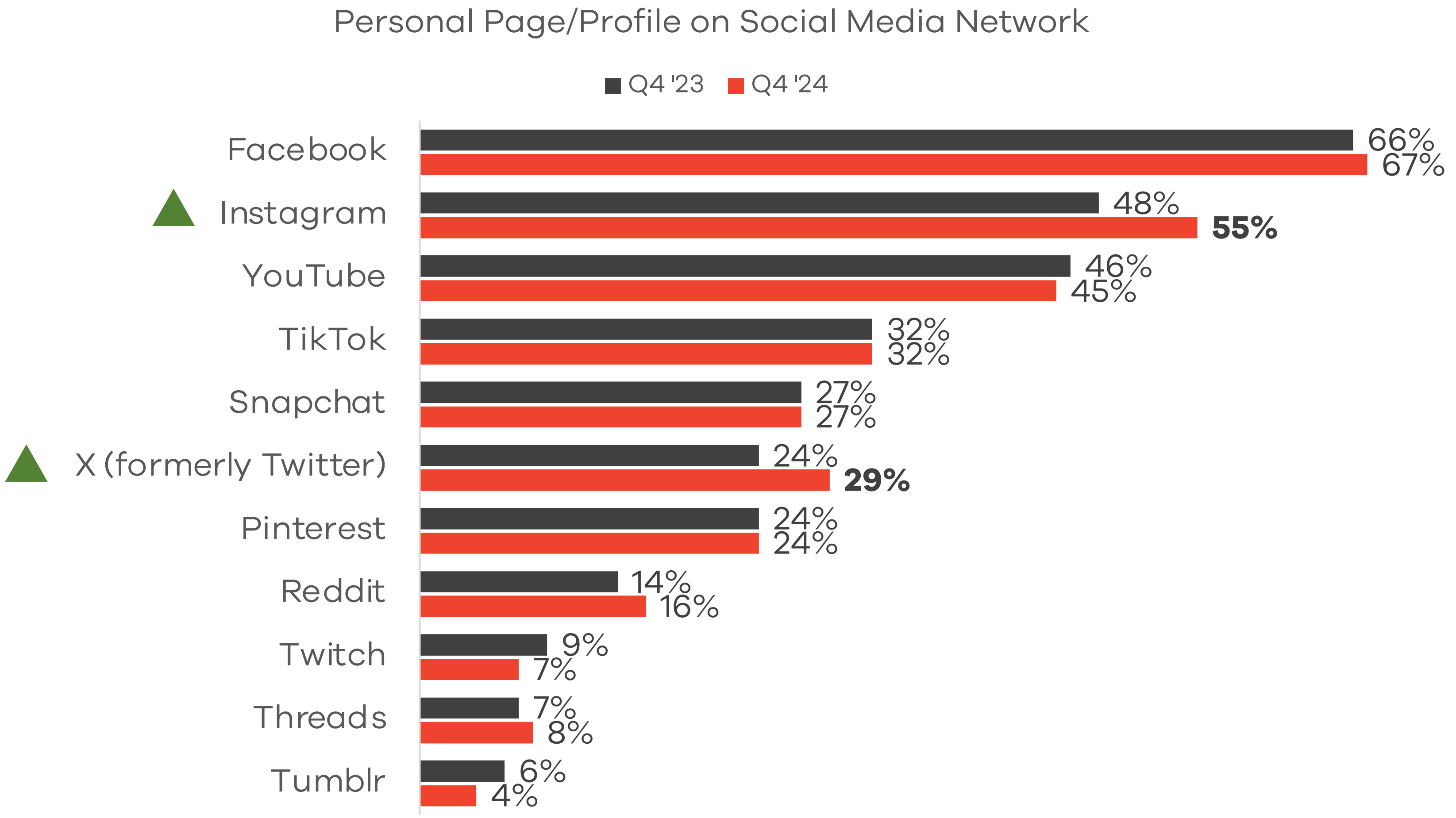
Less Than $100K: **90%**
$100K or More: 88%

/ More older travelers are joining younger travelers on social media, with an increase of 3% and 5% in the number of Gen Xers and Boomers with a personal page from 2023.

Key results in red.
Base: Active leisure travelers (n=3,633)
Source: MMGY's 2024 *Portrait of American Travelers®* "Winter Edition"

MMGY Travel Intelligence

Instagram and X both saw significantly more active leisure travelers with personal pages compared to 2023.



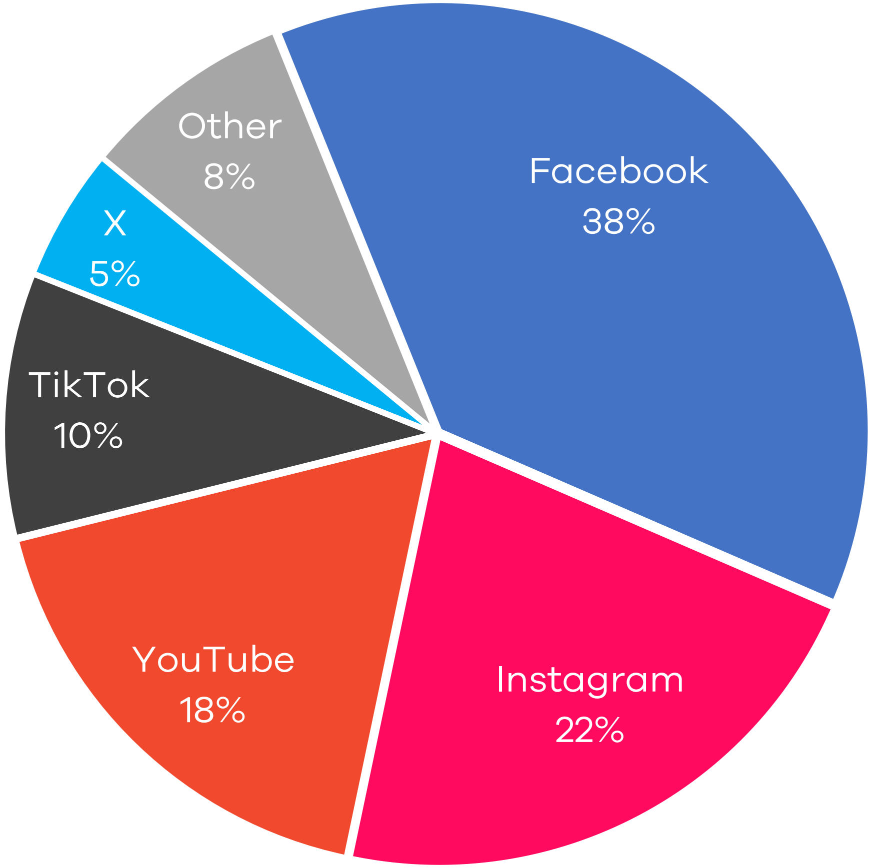
Data in bold indicates a statistically significant difference from Q4 '23.
Base: Active leisure travelers who have a page/profile on social media (n=3,189)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Active leisure travelers spend the most time on Facebook, followed by Instagram and then YouTube.

Which social media platform do you spend the most time on?

One-quarter (25%) of Gen Z travelers spend the most time on TikTok.



Other	%
Snapchat	2%
Pinterest	2%
Reddit	2%
Twitch	1%
Threads	0%
Tumblr	0%
Other	1%

Base: Active leisure travelers who have a page/profile on social media or who responded (n=3,246)
Source: MMGY's 2024 *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 it does not rank among the top three for Gen Zers.

Top three networks for each generation are shaded.

Personal Page/Profile on Social Media Network	Gen Zers	Millennials	Gen Xers	Boomers
Instagram	78%	74%	54%	28%
YouTube	71%	57%	45%	22%
TikTok	66%	43%	30%	8%
Snapchat	58%	42%	22%	5%
Facebook	50%	70%	75%	64%
X (formerly Twitter)	47%	36%	31%	13%
Pinterest	35%	30%	26%	14%
Reddit	27%	25%	15%	3%
Twitch	21%	12%	4%	0%
Threads	12%	13%	9%	2%
Tumblr	10%	6%	3%	0%

Base: Active leisure travelers who have a page/profile on social media (Gen Zers: n=461; Millennials: n=1,050; Gen Xers: n=849; Boomers: n=782)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Just under 6 in 10 (59%) active leisure travelers are planning to use social media sites less in the upcoming year.

64% Q4 '23

59% Q4 '24

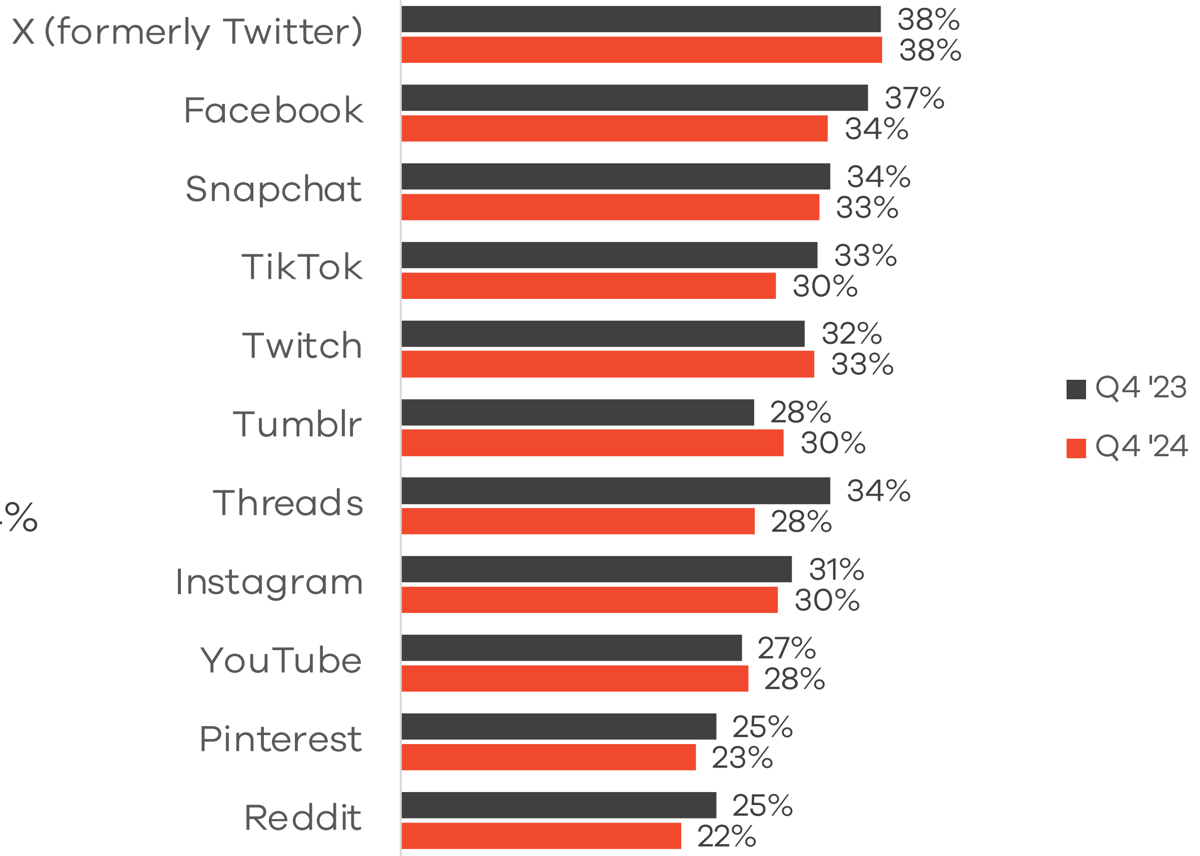
of active leisure travelers plan to use at least one of the social media sites they are currently using less in the upcoming year.

Gen Zers: **77%**
Millennials: **66%**
Gen Xers: 55%
Boomers: 45%

Have Kids in Household: **68%**
Don't Have Kids in Household: 54%

Less Than $100K: 58%
$100K or More: 60%

Social Media Platform Using Less Over Next Year
(Among those currently using each)



Key results in red.
Base: Active leisure travelers who have a page/profile on social media or who responded (n=3,246)
Source: MMGY's 2024 *Portrait of American Travelers®* "Winter Edition"

Around 15% of active leisure travelers who do not use YouTube or Facebook currently plan to do so over the next year.

48% Q4 '23 **41%** Q4 '24

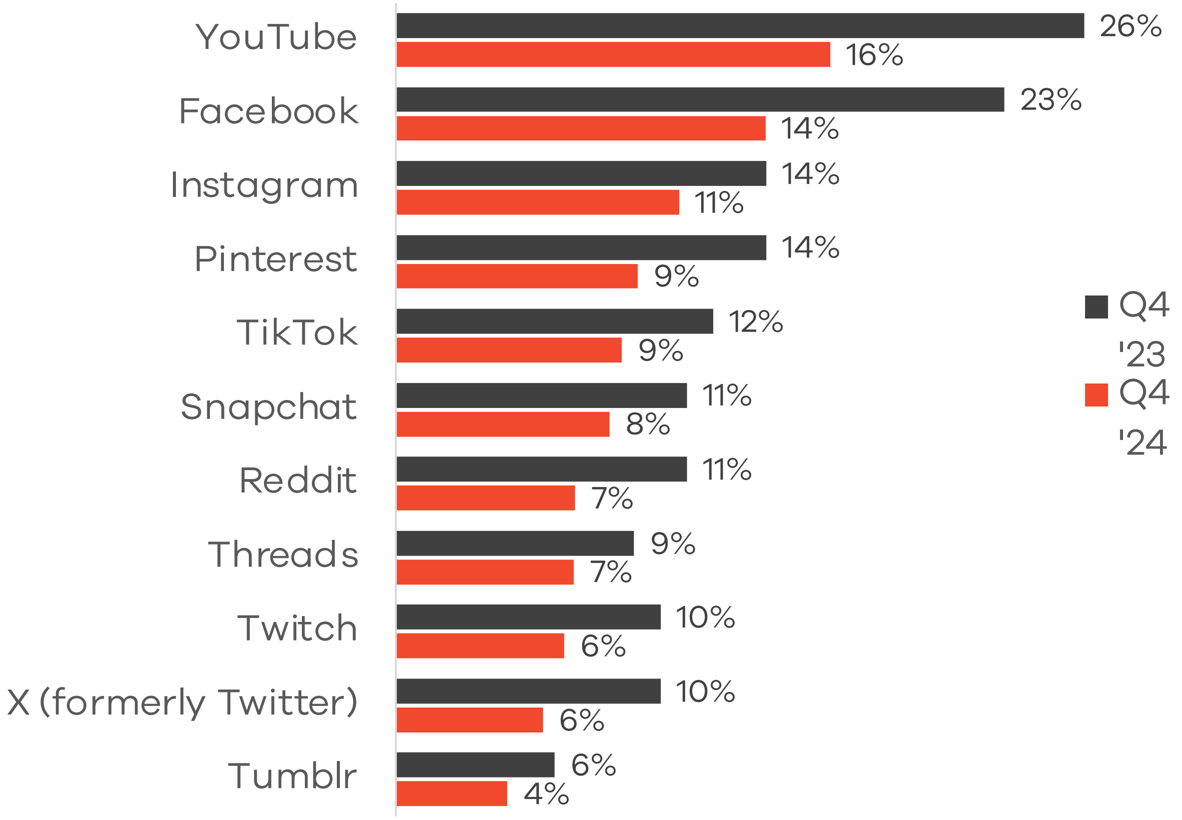
of active leisure travelers plan to use a social media platform over the next year that they are not currently using.

Gen Zers: **53%**
Millennials: **48%**
Gen Xers: 40%
Boomers: 26%

Have Kids in Household: **54%**
Don't Have Kids in Household: 33%

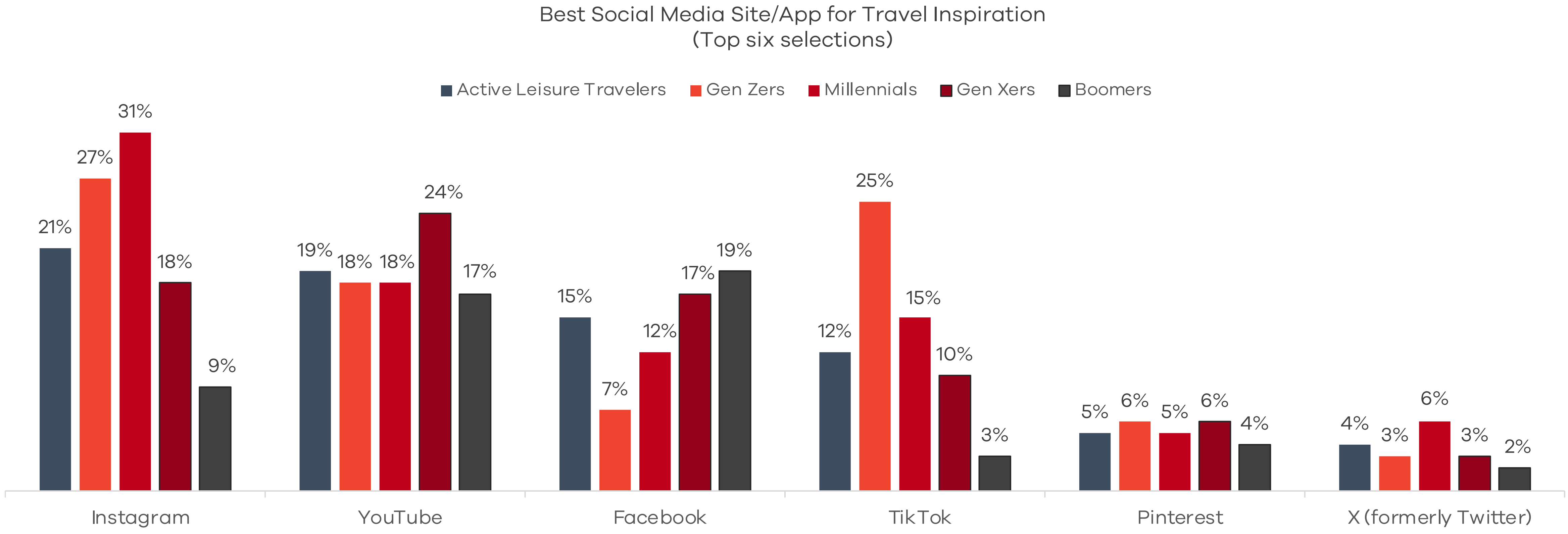
Less Than $100K: 44%
$100K or More: 38%

% Planning to Use Social Media Platform Over the Next Year (Among those not currently using each)



Key results in red.
Base: Active leisure travelers who have a page/profile on social media or who responded (n=3,246)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

Instagram and TikTok are considered the best platforms for travel inspiration among Gen Zers, while Gen Xers and Boomers utilize Facebook over any other platform.



Base: Active leisure travelers who have a page/profile on social media or who responded (n=3,246; Gen Zers: n=458; Millennials: n=1,098; Gen Xers: n=851; Boomers: n=789)

Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Social media has influenced the vacation choices of half (49%) of all active leisure travelers.

46% Q4 '23

49% Q4 '24 ▲

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: **66%**
Millennials: **61%**
Gen Xers: 48%
Boomers: 26%

Have Kids in Household: **65%**
Don't Have Kids in Household: 41%

Less Than $100K: 46%
$100K or More: 53%

/ Gen Z travelers and those with kids in the household are most likely to select a vacation destination based on social media. Parents of children with social media profiles are even more likely to be influenced by social media.

Key results in red.
Base: Active leisure travelers who have a page/profile on social media or who responded (n=3,246)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Vacation Destinations on Social Media

32% Q4 '23

30% Q4 '24 ▼

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

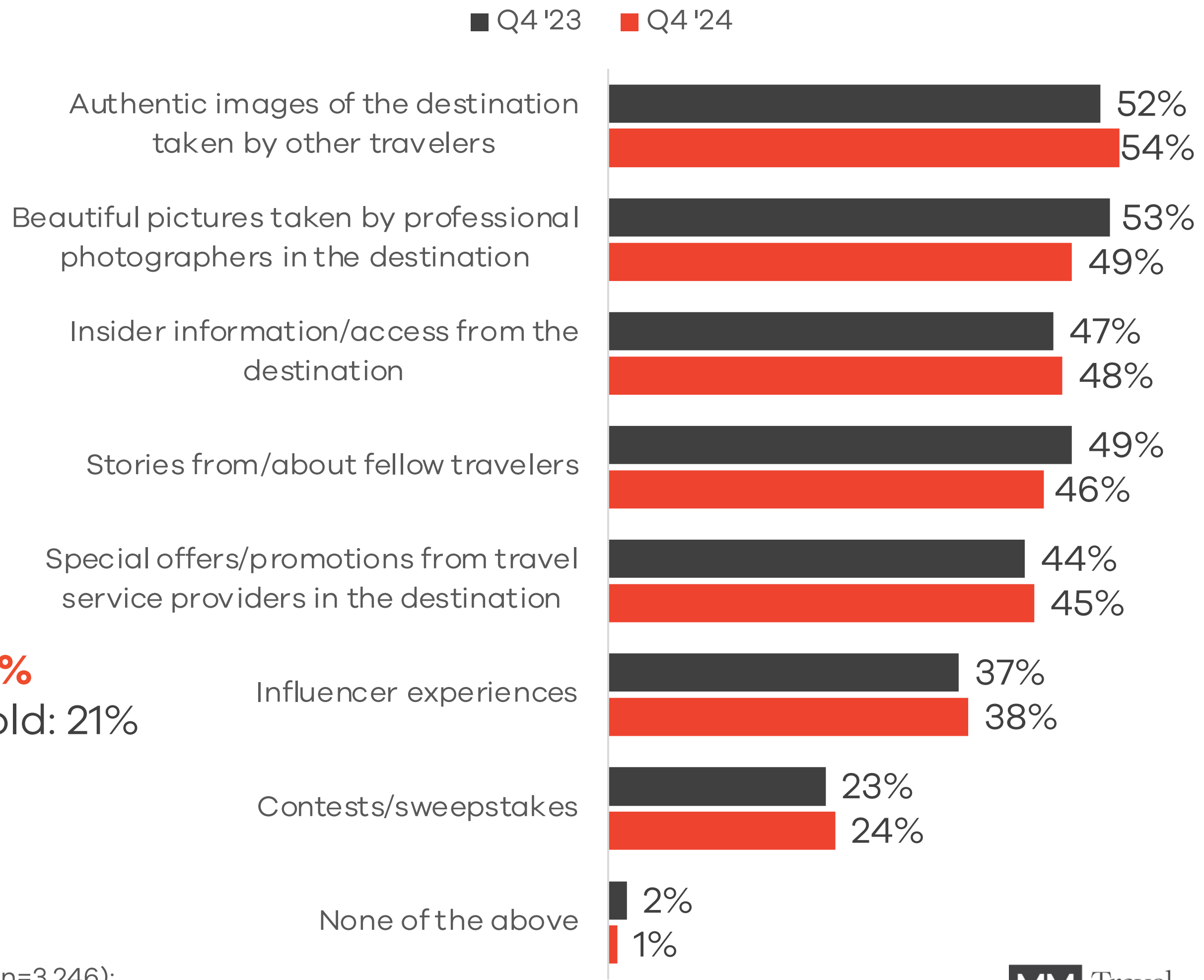
/ More younger travelers, travelers with higher incomes and travelers with kids follow a vacation destination on social media.

Gen Zers: **35%**
Millennials: **43%**
Gen Xers: 31%
Boomers: 11%

Have Kids in Household: **48%**
Don't Have Kids in Household: 21%

Less Than $100K: 25%
$100K or More: **36%**

Valued Content on Social Media From Travel Destinations



Key results in red.
Base: Active leisure travelers who have a page/profile on social media or who responded (n=3,246); those who follow a vacation destination on social media (n=969)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

Travel Service Providers on Social Media

28% Q4 '23 **28%** Q4 '24

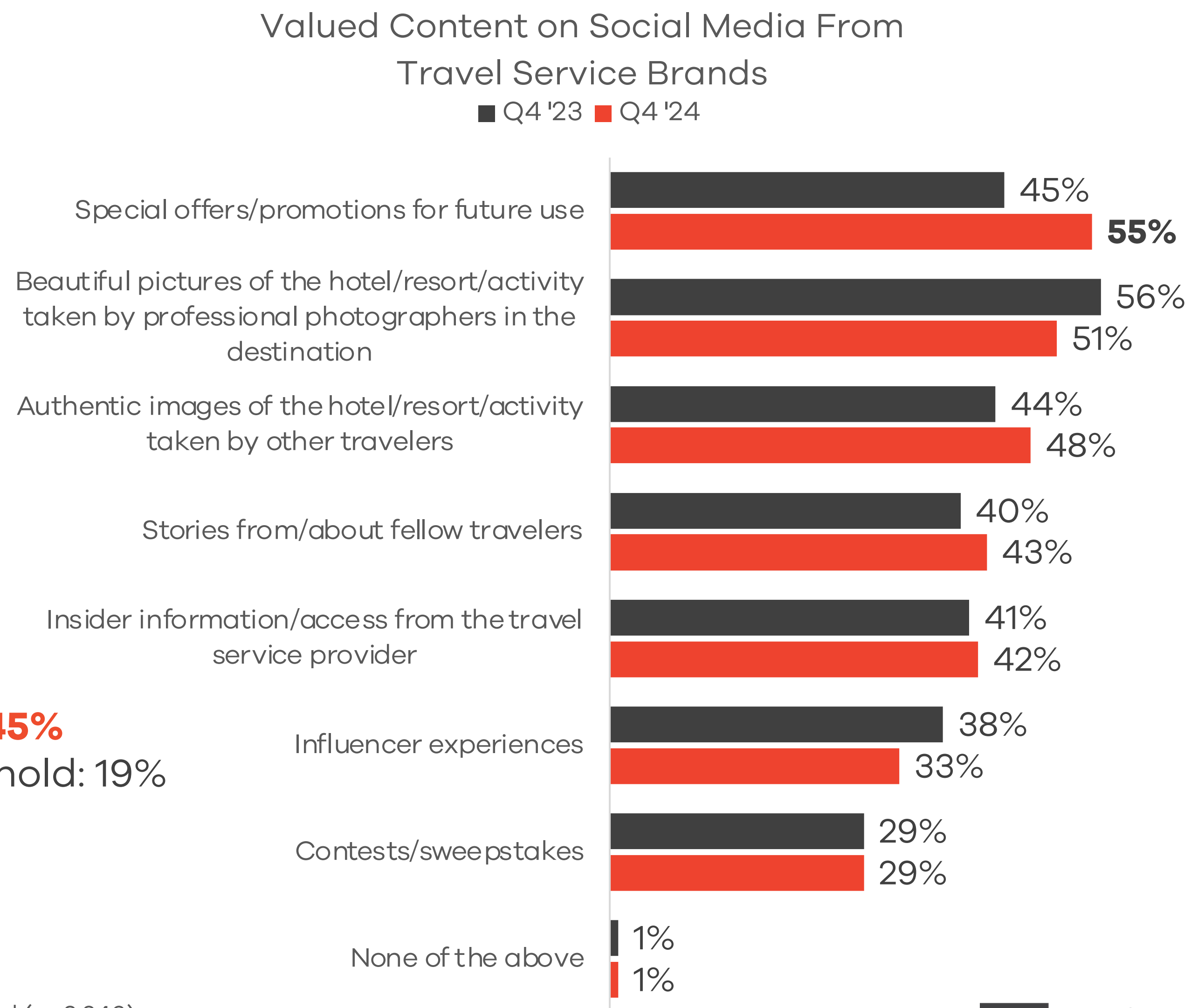
of active leisure travelers follow a travel service provider on social media.

/ Significantly more travelers value special offers/promotions from travel service brands, more so than any other content.

Gen Zers: **33%**
Millennials: **40%**
Gen Xers: 27%
Boomers: 10%

Have Kids in Household: **45%**
Don't Have Kids in Household: 19%

Less Than $100K: 21%
$100K or More: **34%**



Key results in red.
Data in bold indicates a statistically significant difference from Q4 '23.
Base: Active leisure travelers who have a page/profile on social media or who responded (n=3,246); those who follow a travel service provider on social media (n=885)
Source: MMGY's 2024 *Portrait of American Travelers®* "Winter Edition"

MMGY Travel Intelligence

Half of all active leisure travelers with social media follow celebrities and influencers/content creators.

49% Q4 '24

of active leisure travelers follow a celebrity on social media.

Gen Zers: **79%**
Millennials: **69%**
Gen Xers: 45%
Boomers: 13%

Have Kids in Household: **66%**
Don't Have Kids in Household: 40%

Less Than $100K: 49%
$100K or More: 49%

50% Q4 '24

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

Gen Zers: **80%**
Millennials: **68%**
Gen Xers: 45%
Boomers: 15%

Have Kids in Household: **66%**
Don't Have Kids in Household: 41%

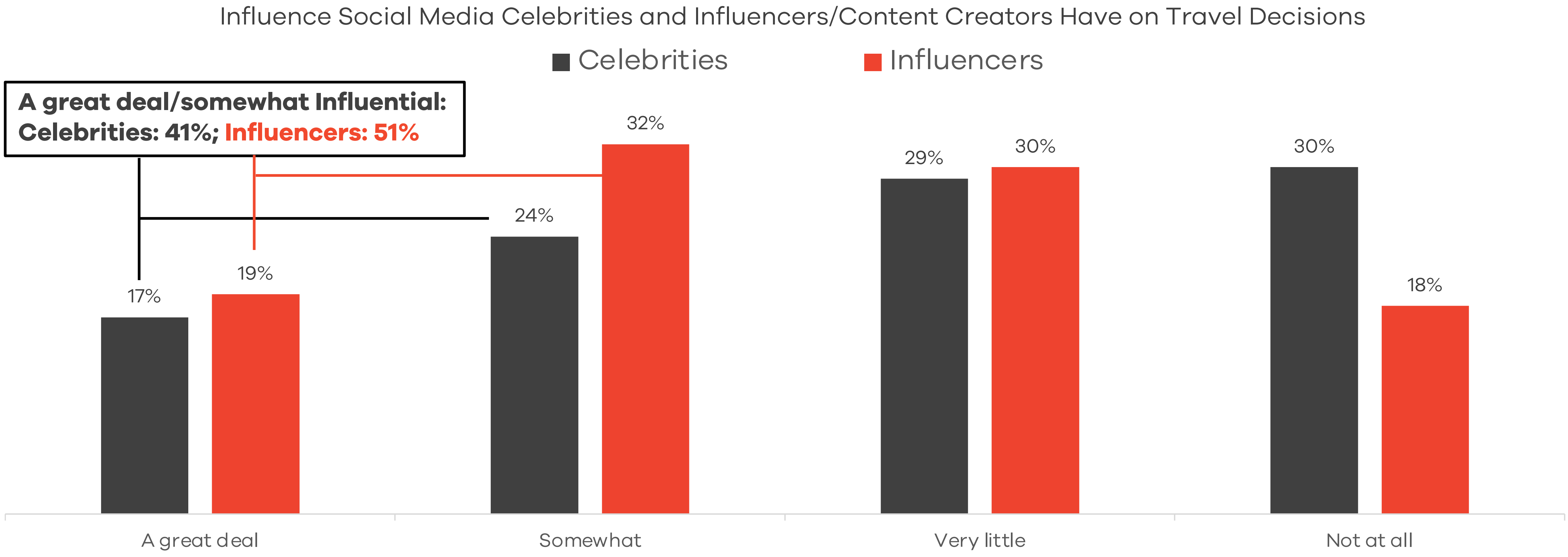
Less Than $100K: 48%
$100K or More: **51%**

/ More younger travelers and travelers with kids in the household follow a celebrity or influencer/content creator on social media.

Key results in red.
Base: Active leisure travelers who have a page/profile on social media or who responded (n=3,246)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

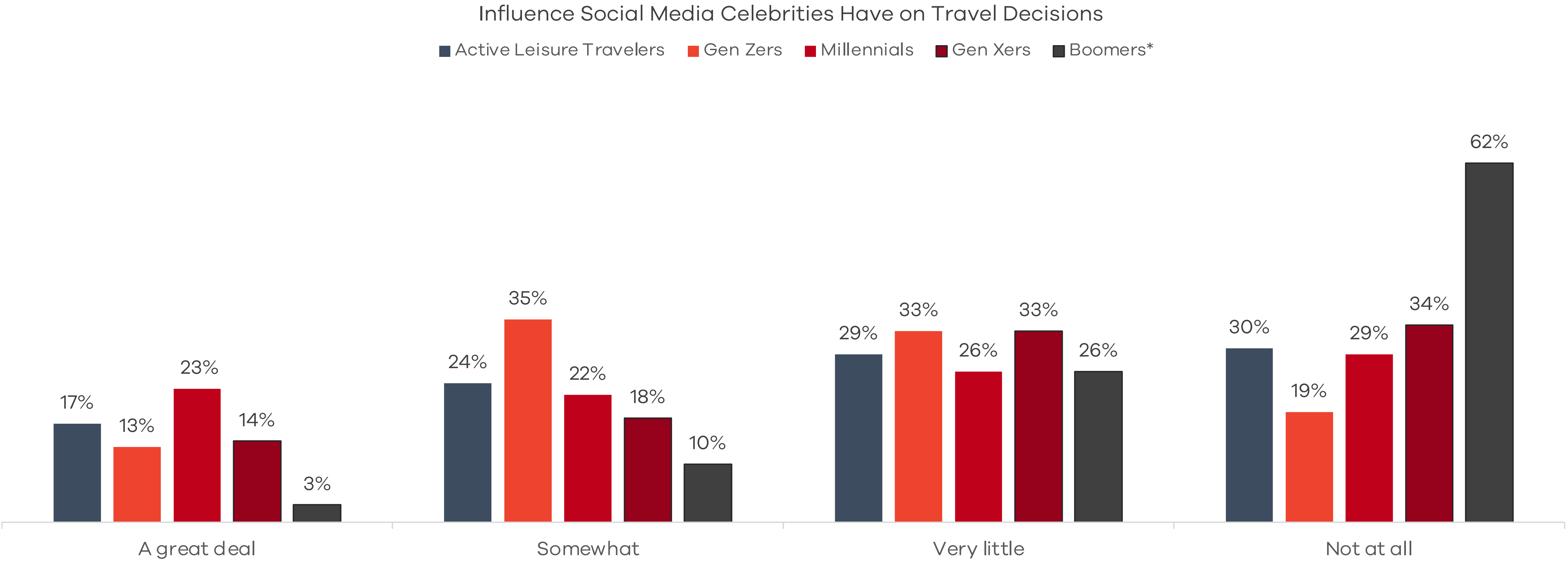
MMGY Travel Intelligence

Over half (51%) of active leisure travelers reported that influencers have at least somewhat of an influence on their travel decisions, compared to 4 in 10 (41%) who said celebrities were influential.



Base: Active leisure travelers who have a page/profile on social media and who follow a celebrity (n=1,657) or influencer/content creator (n=1,668)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

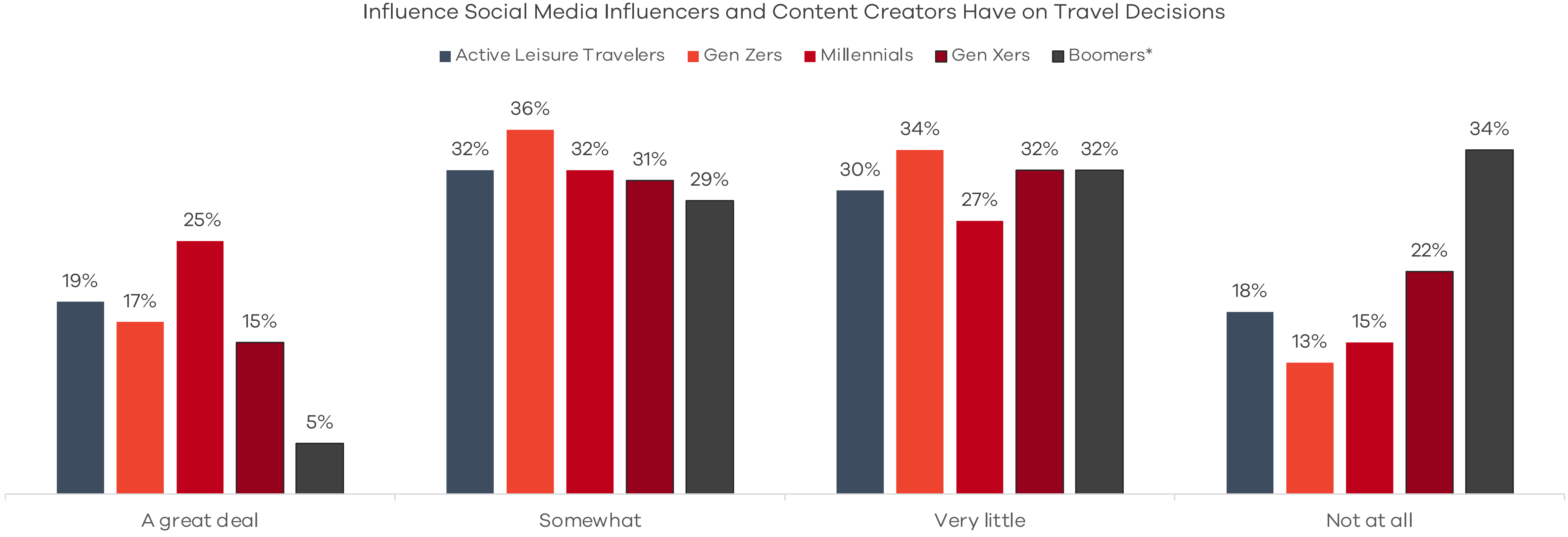
Gen Zers and Millennials are significantly more influenced by social media celebrities in their travel decisions than other generations.



* Small sample size – interpret with caution.
Base: Active leisure travelers who have a page/profile on social media and who follow a celebrity (n=1,657)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Influencers and content creators are significantly more influential on older generations compared to celebrities but have the most influence on younger leisure travelers.



* Small sample size – interpret with caution.
Base: Active leisure travelers who have a page/profile on social media and who follow an influencer/content creator (n=1,668)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Compared to 2023, 11% fewer leisure travelers perceive influencer content to authentically represent destinations.

72% Q4 '23

61% Q4 '24

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

Gen Zers: 57%
Millennials: 61%
Gen Xers: 63%
Boomers*: 62%

Have Kids in Household: **68%**
Don't Have Kids in Household: 55%

Less Than $100K: 62%
$100K or More: 60%

/ Travelers with children in the household are most likely to perceive content from influencers as authentic representations.

* Small sample size – interpret with caution.
Key results in red.
Base: Active leisure travelers who have a page/profile on social media and who follow an influencer/content creator (n=1,668)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Over 4 in 10 (41%) travelers have been influenced to make travel purchases following a post from social media personalities.

43% Q4 '23

41% Q4 '24

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: **46%**
Millennials: **47%**
Gen Xers: 35%
Boomers: 18%

Have Kids in Household: **51%**
Don't Have Kids in Household: 34%

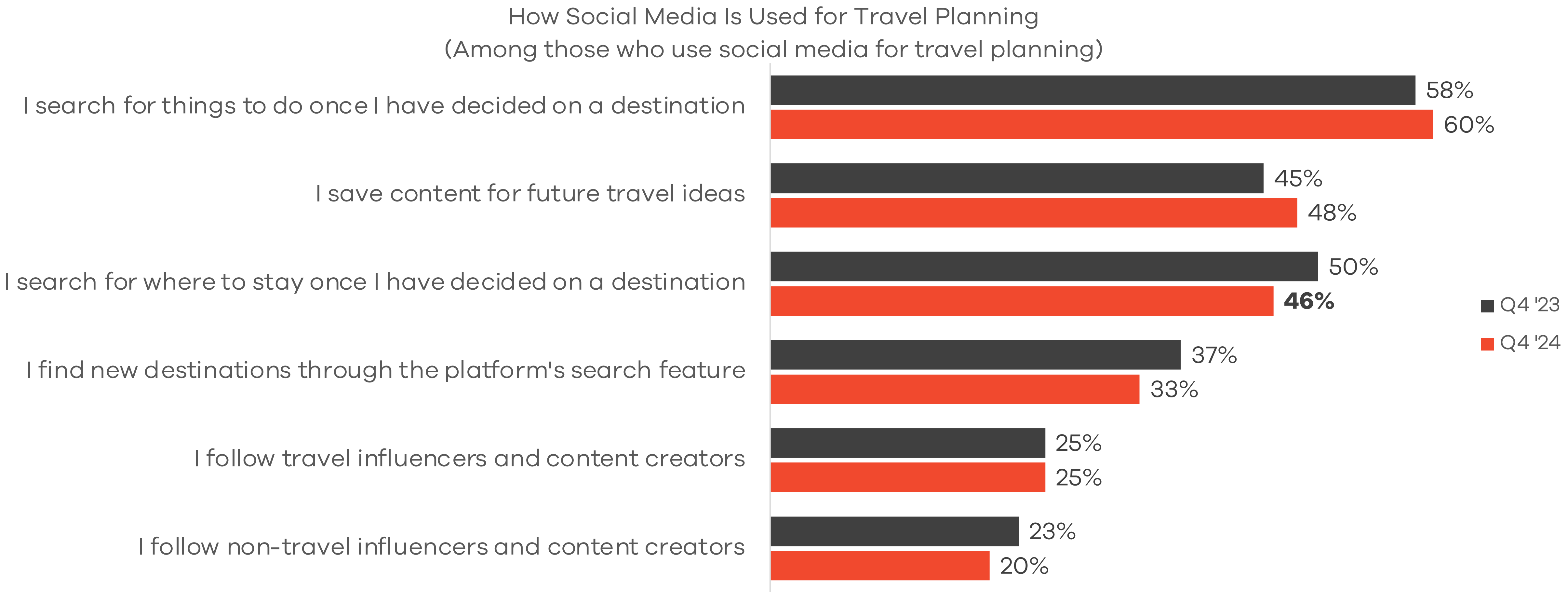
Less Than $100K: 36%
$100K or More: **46%**

/ Higher-income travelers ($100K+) are 10% more likely to have made a purchase decision based at least partially on a social media post compared to lower-income travelers (<$100K).

Key results in red.
Base: Active leisure travelers who have a page/profile on social media and follow a celebrity/influencer on social media (n=1,668)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

More travelers are using social media in 2024 to save content for future travel ideas (48%) and search for things to do in the destinations they have decided to visit (60%).



Data in bold indicates a statistically significant difference from Q4 ‘23.
Base: Active leisure travelers who use social media for planning travel (n=2,244)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

Social Media Agreement Statements

/ Millennials are the most likely to share travel content on social media while traveling, and 39% of Gen Zers seek out "Instagrammable" photo opportunities when exploring a destination.

% Who Agree With Each Statement	Active Leisure Travelers	Gen Zers	Millennials	Gen Xers	Boomers
I like using social media to share my travel experiences.	38%	50%	47%	38%	23%
I am likely to share travel content on social media while traveling.	35%	40%	44%	35%	20%
I seek out "Instagrammable" photo opportunities while exploring a destination.	25%	39%	33%	22%	8%
A destination's "Instagrammability" influences my choice of where to go on vacation.	18%	21%	26%	12%	5%
I post my vacation photos on social media to make my friends jealous.	16%	22%	25%	18%	6%

Base: Active leisure travelers who have a page/profile on social media or who responded
(Base: n=3,246; Gen Zers: n=458; Millennials: n=1,098; Gen Xers: n=851; Boomers: n=789)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

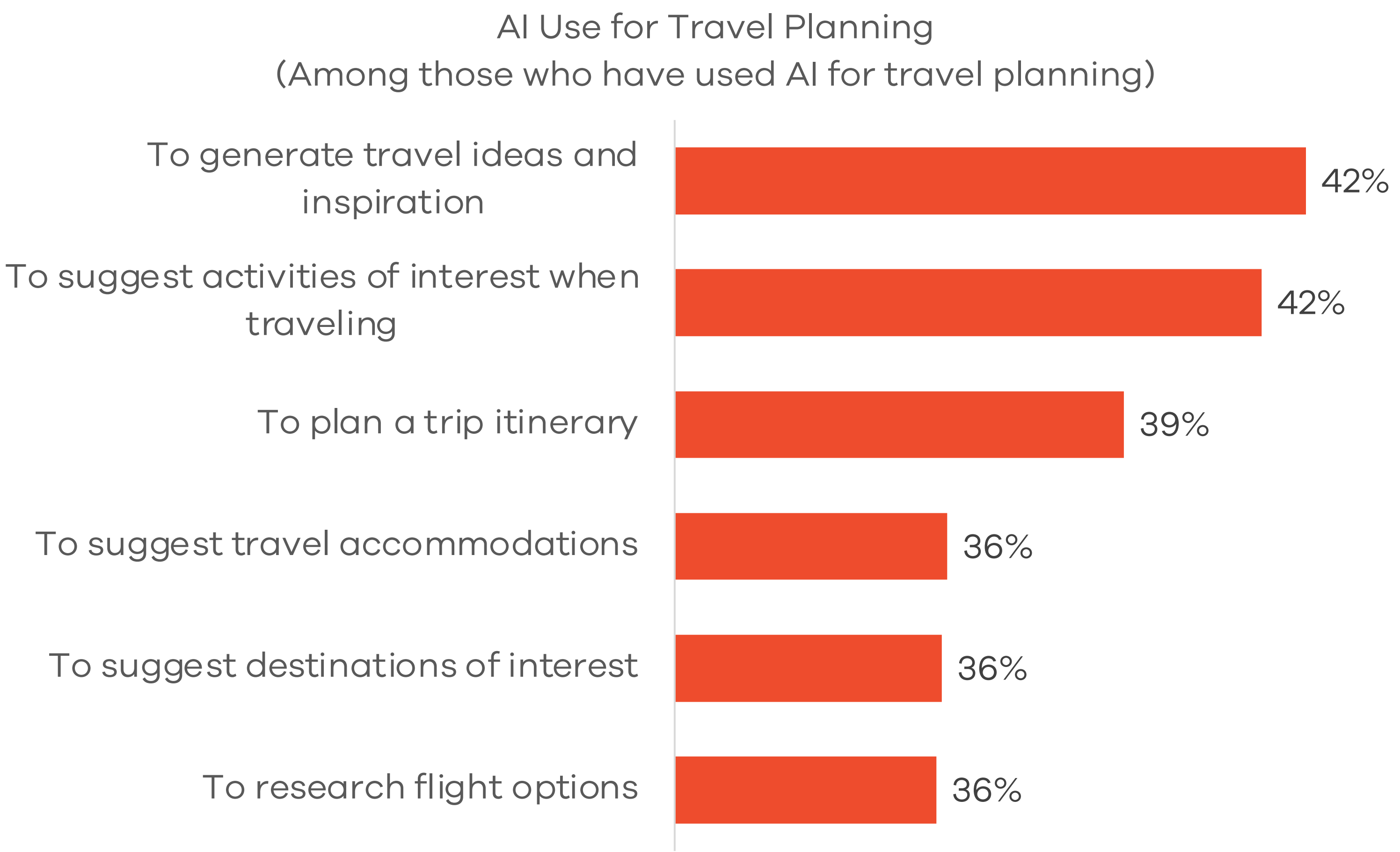
Vacation Motivators and Activities

MMGY Travel Intelligence

ChatGPT or other AI tools have been used by one-third (32%) of active leisure travelers for planning travel. AI is used most to generate travel ideas and suggest activities of interest.

32%

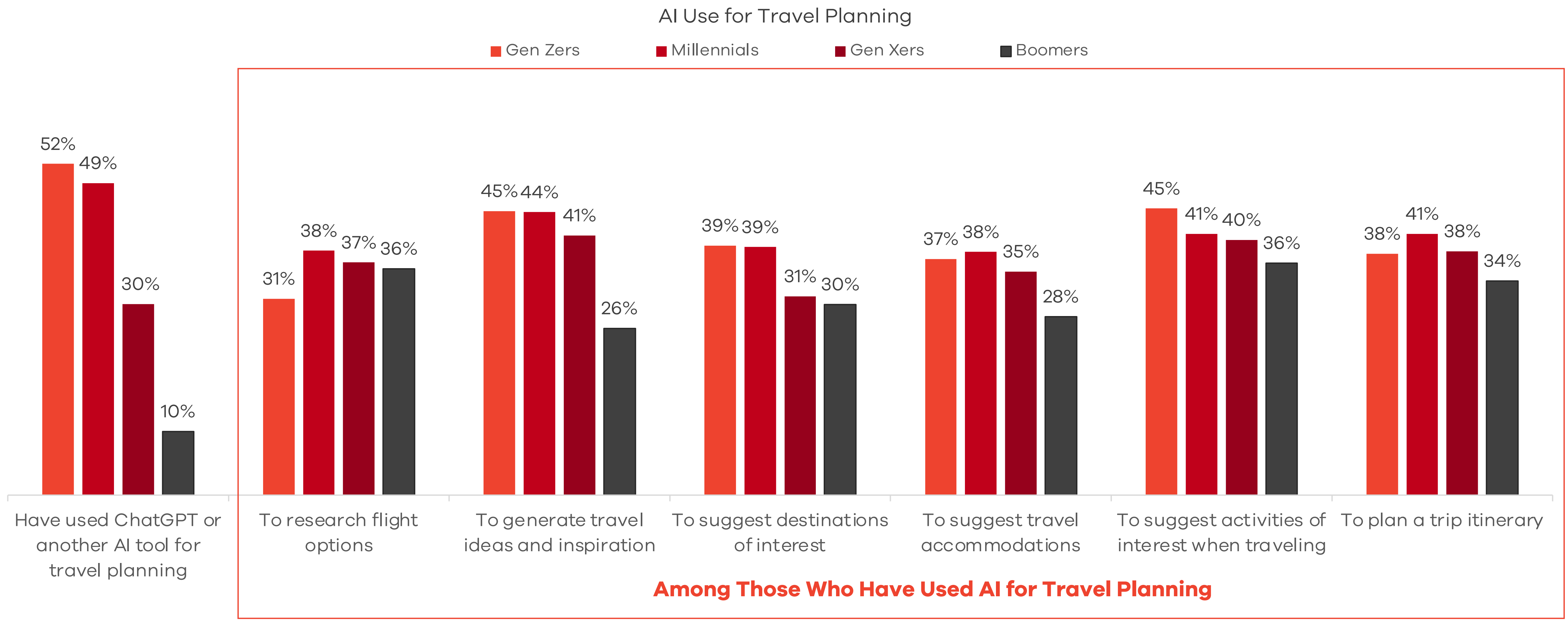
of active leisure travelers have used ChatGPT or another AI tool for travel planning.



Base: Active leisure travelers (n=3,633); those who have used ChatGPT or another AI tool for travel planning (n=1,158)

Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

Gen Z and Millennial travelers use AI tools the most for their vacation planning.

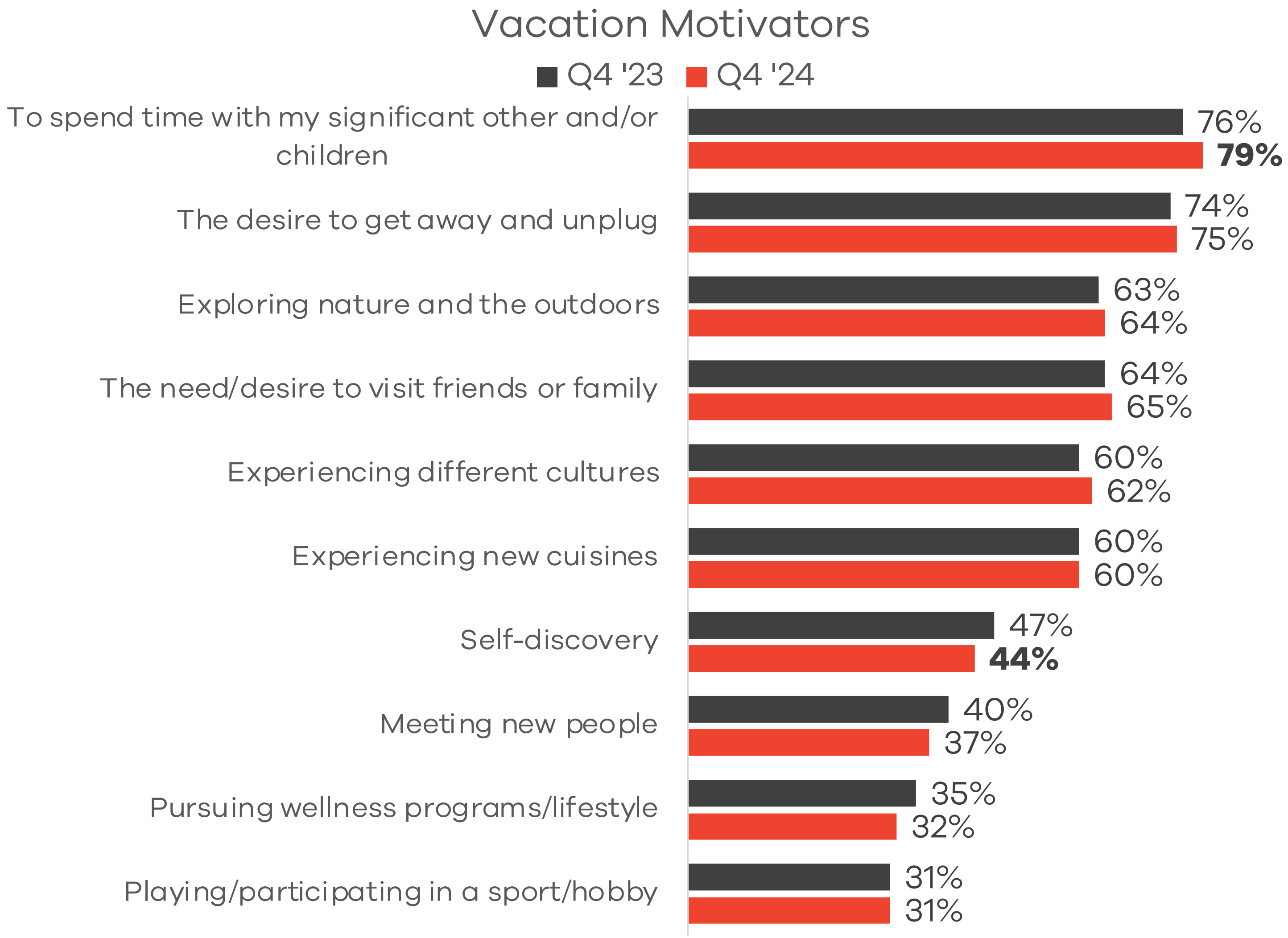


* Small sample size – interpret with caution.

Base: Those who have used ChatGPT or another AI tool for travel planning (Gen Zers: n=240; Millennials: n=529; Gen Xers: n=282; Boomers: n=107)

Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

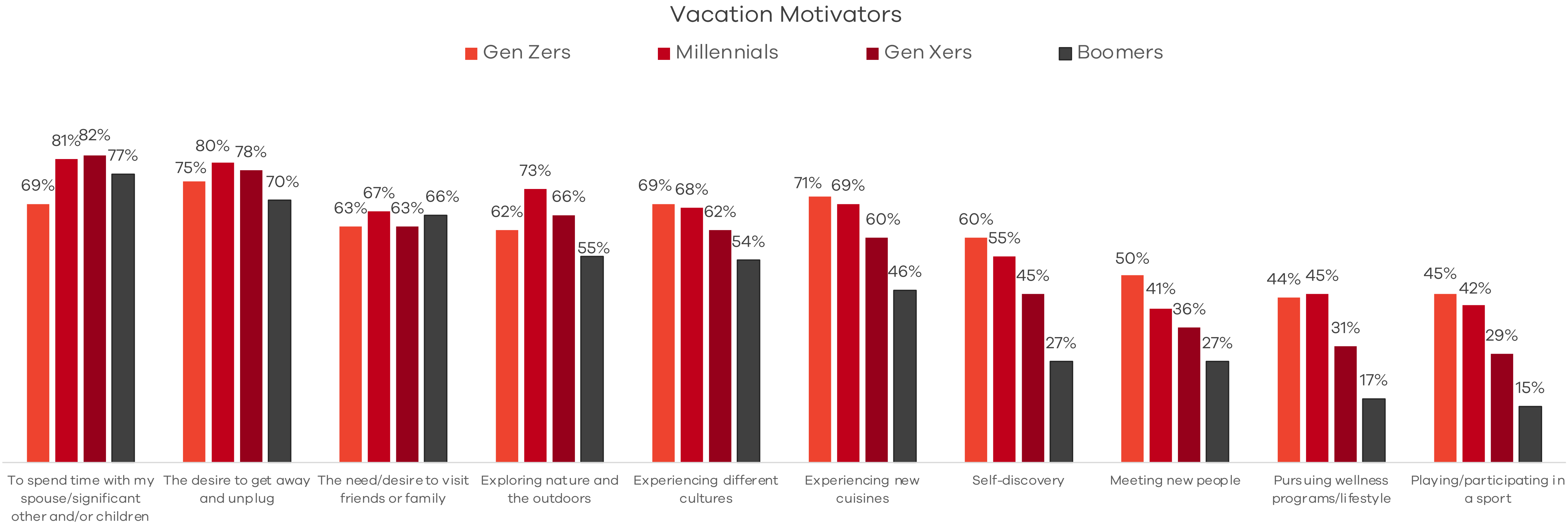
Spending time with family is becoming more motivating for active leisure travelers compared to 2023, while self-discovery is significantly less motivating.



Data in bold indicates a statistically significant difference from Q4 2023.
Base: Active leisure travelers (n=3,633)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

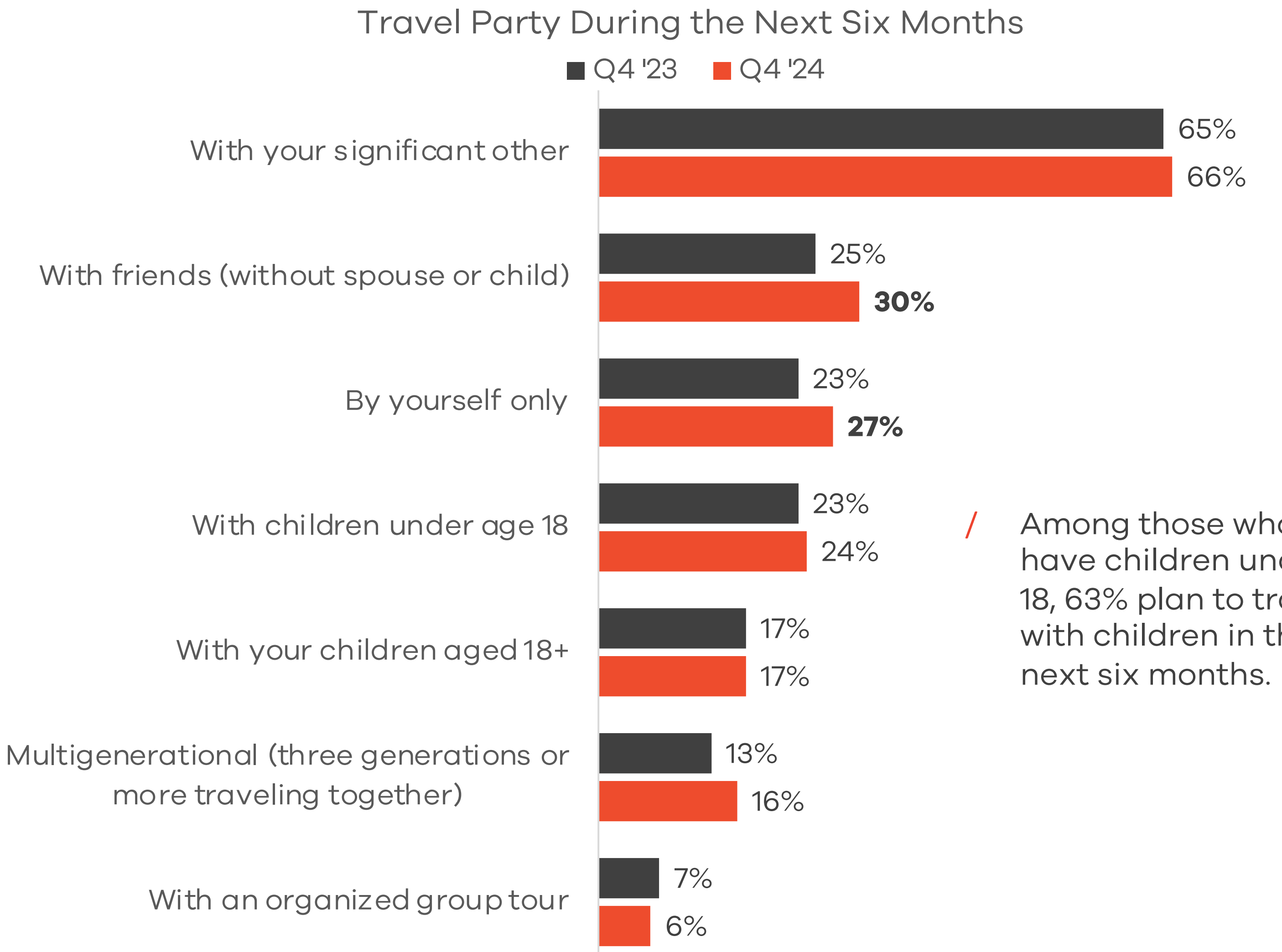
Older generations are motivated by seeing family and friends, while younger travelers seek immersive cultural experiences and enjoy sampling new cuisines.



Base: Active leisure travelers (Gen Zers: n=464; Millennials: n=1,121; Gen Xers: n=927; Boomers: n=1,043)
Source: MMGY's 2024 *Portrait of American Travelers®* "Winter Edition"

MMGY Travel Intelligence

Couples Travel Remains the Most Common Form of Travel.



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

Data in bold indicates a statistically significant difference from Q4 2023.
Base: Active leisure travelers who intend to travel during the next six months (n=2,980)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

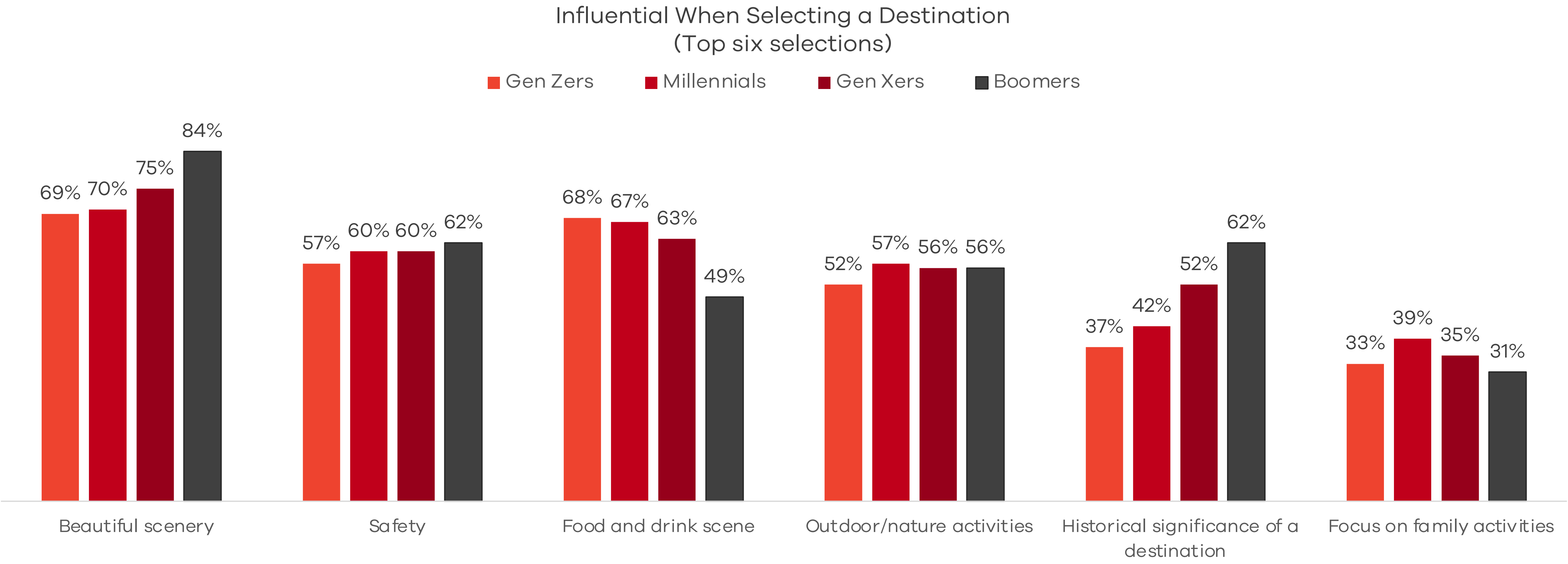
American travelers are craving natural experiences – beautiful scenery and outdoor/nature activities have become significantly more influential in leisure travelers' destination decisions.

Influential When Selecting a Destination (Top 2 Box)	**Q4 '23**	**Q4 '24**
Beautiful scenery	72%	**75%**
Safety	59%	60%
Food and drink scene	58%	60%
Outdoor/nature activities	50%	**55%**
Historical significance of a destination	48%	50%
Focus on family activities	34%	35%
A sense of tradition (place family has traditionally visited)	30%	32%
Music scene	28%	25%
The ethnic diversity and multicultural population of a destination	22%	25%
Nightlife/bars	23%	23%
The destination's reputation for environmental responsibility	14%	15%
The destination's commitment to social justice and equality	12%	12%
LGBTQ+ travel offerings	6%	6%

Data in bold indicates a statistically significant difference from Q4 2023.
Base: Active leisure travelers (n=3,633)
Source: MMGY's 2024 *Portrait of American Travelers®* "Winter Edition"

MMGY Travel Intelligence

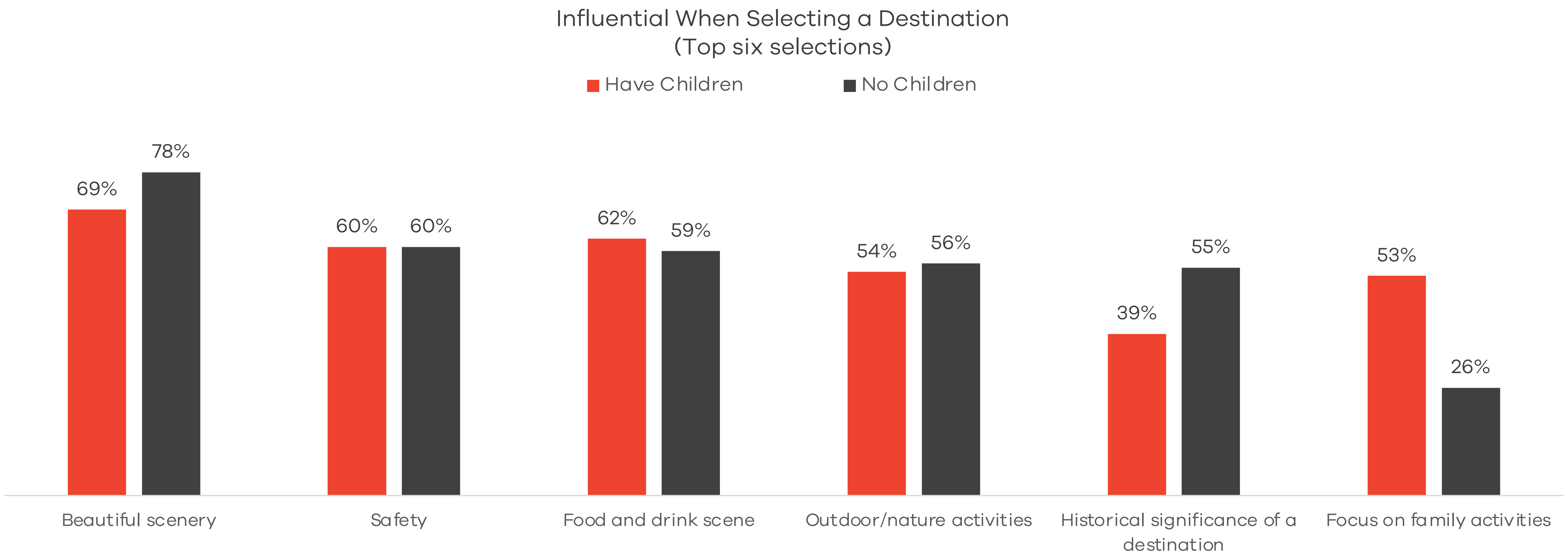
Boomers and Gen Xers are most influenced by beautiful scenery and the historical significance of a destination. Younger travelers find the food and drink scene very influential, while Millennials pay special attention to the family activities available.



Base: Active leisure travelers (Gen Zers: n=464; Millennials: n=1,121; Gen Xers: n=927; Boomers: n=1,043)
Source: MMGY's 2024 *Portrait of American Travelers®* "Winter Edition"

MMGY Travel Intelligence

Historical significance of destinations and beautiful scenery is more important to travelers without children in the household and, unsurprisingly, a focus on family activities is more important for those with younger kids in the household.



Base: Active leisure travelers (Have children in household: n=1,223; No children in household: n=2,410)
Source: MMGY's 2023 *Portrait of American Travelers®* "Winter Edition"

MMGY Travel Intelligence

Top Activities of Interest on Vacation

Top Activities of Interest	Q4 '23	Q4 '24
Beach experiences	55%	58%
Visiting a state or national park	48%	55%
Historical sites	51%	53%
Shopping	46%	48%
Visiting a museum	48%	47%
Visiting a zoo or aquarium	41%	43%
Food tours	35%	37%
Visiting a theme or amusement park	34%	36%
Dining cruise	33%	36%
Visiting notable architectural sites	31%	36%
Attending a concert/music festival	33%	35%
Hiking/climbing/biking/other outdoor adventures	32%	34%
Guided tours to otherwise inaccessible local experiences	28%	33%
Attending a sporting event	25%	30%
Adventure travel (safaris, mountain climbing, trekking, etc.)	24%	28%

Base: Active leisure travelers (n=3,633)
Source: MMGY's 2023 *Portrait of American Travelers®* "Winter Edition"

Top Activities of Interest on Vacation

Top Activities of Interest (cont.)	Q4 '23	Q4 '24
Nightlife	28%	27%
Cooking, wine or cocktail classes	26%	27%
Casino gambling	30%	26%
Dinner theatre	26%	26%
Spa services (massages, facials, etc.)	25%	25%
Camping	25%	23%
Exploring family's ancestry/past on a heritage vacation	22%	22%
Attending performing arts events	20%	22%
Water sports (waterskiing, boating/rafting)	19%	22%
Film/art festivals	20%	19%
Snow skiing/snowboarding	11%	13%
Scuba diving	12%	12%
Playing golf	12%	12%
Surfing	9%	7%
Playing tennis	9%	6%

Base: Active leisure travelers (n=3,633)
Source: MMGY's 2023 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

Visiting a state or national park is a top activity for all generations, seeing a 7% overall increase in interest year over year.

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

Interest in Vacation Activities	Gen Zers	Millennials	Gen Xers	Boomers
Beach experiences	58%	56%	61%	60%
Visiting a state or national park	47%	50%	56%	61%
Shopping	59%	48%	50%	43%
Historical sites	40%	45%	51%	69%
Visiting a zoo or aquarium	46%	44%	43%	41%
Visiting a museum	43%	43%	46%	53%
Visiting a theme or amusement park	48%	41%	38%	25%
Hiking/climbing/biking/other outdoor adventures	34%	41%	37%	28%
Food tours	44%	40%	36%	32%
Adventure travel (safaris, mountain climbing, trekking, etc.)	40%	35%	28%	19%
Dining cruise	35%	35%	36%	36%
Nightlife	44%	34%	27%	15%
Attending a concert/music festival	39%	33%	36%	34%
Cooking, wine or cocktail classes	30%	33%	25%	21%
Attending a sporting event	24%	33%	32%	30%

Base: Active leisure travelers (Gen Zers: n=464; Millennials: n=1,121; Gen Xers: n=927; Boomers: n=1,043)
Source: MMGY's 2024 *Portrait of American Travelers®* "Winter Edition"

Adventure activities, including scuba diving and surfing, are more popular among Gen Z travelers than any other generation.

Interest in Vacation Activities (cont.)	Gen Zers	Millennials	Gen Xers	Boomers
Visiting notable architectural sites	26%	31%	37%	42%
Spa services (massages, facials, etc.)	29%	31%	25%	17%
Camping	27%	29%	26%	12%
Guided tours to otherwise inaccessible local experiences	29%	28%	31%	42%
Water sports (waterskiing, boating/rafting)	29%	27%	24%	12%
Dinner theatre	32%	24%	25%	25%
Attending performing arts events	23%	23%	19%	24%
Casino gambling	22%	22%	31%	29%
Exploring family's ancestry/past on a heritage vacation	25%	21%	22%	22%
Film/art festivals	33%	20%	16%	14%
Snow skiing/snowboarding	22%	18%	13%	5%
Scuba diving	20%	15%	12%	5%
Playing golf	12%	12%	10%	13%
Surfing	17%	10%	7%	2%
Playing tennis	10%	9%	6%	2%

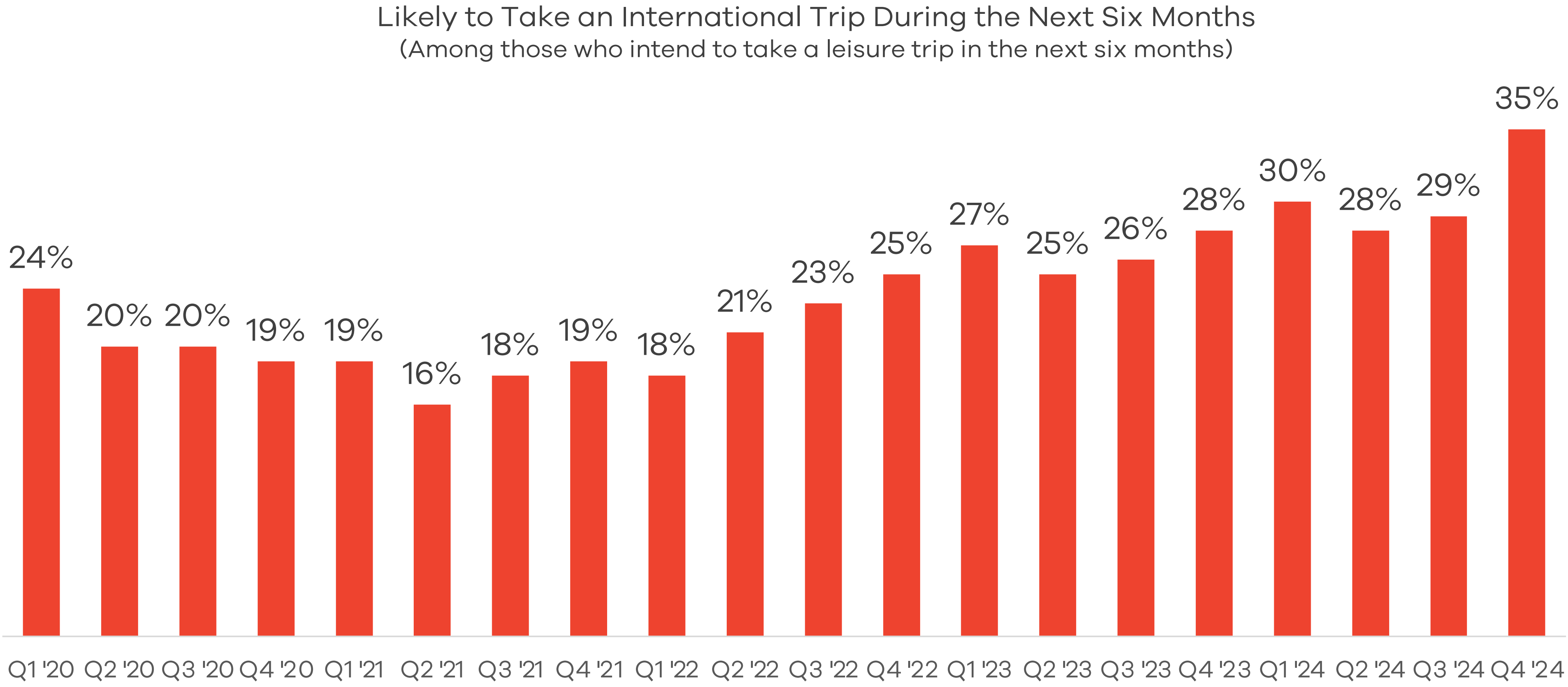
Base: Active leisure travelers (Gen Zers: n=464; Millennials: n=1,121; Gen Xers: n=927; Boomers: n=1,043)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

MMGY Travel Intelligence

International Travel Intentions

MMGY Travel Intelligence

Likelihood to take an international trip in the next six months rose significantly in Q4 2024.



Base: Active leisure travelers who intend to travel during the next six months (n=2,980)
Source: MMGY's 2024 *Portrait of American Travelers®* "Winter Edition"

MMGY Travel Intelligence

Measured interest in international travel is up slightly from one year ago.

80% Q4 '23

84% Q4 '24

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

Gen Zers: **90%**
Millennials: **90%**
Gen Xers: **84%**
Boomers: 74%

Have Kids in Household: **86%**
Don't Have Kids in Household: 83%

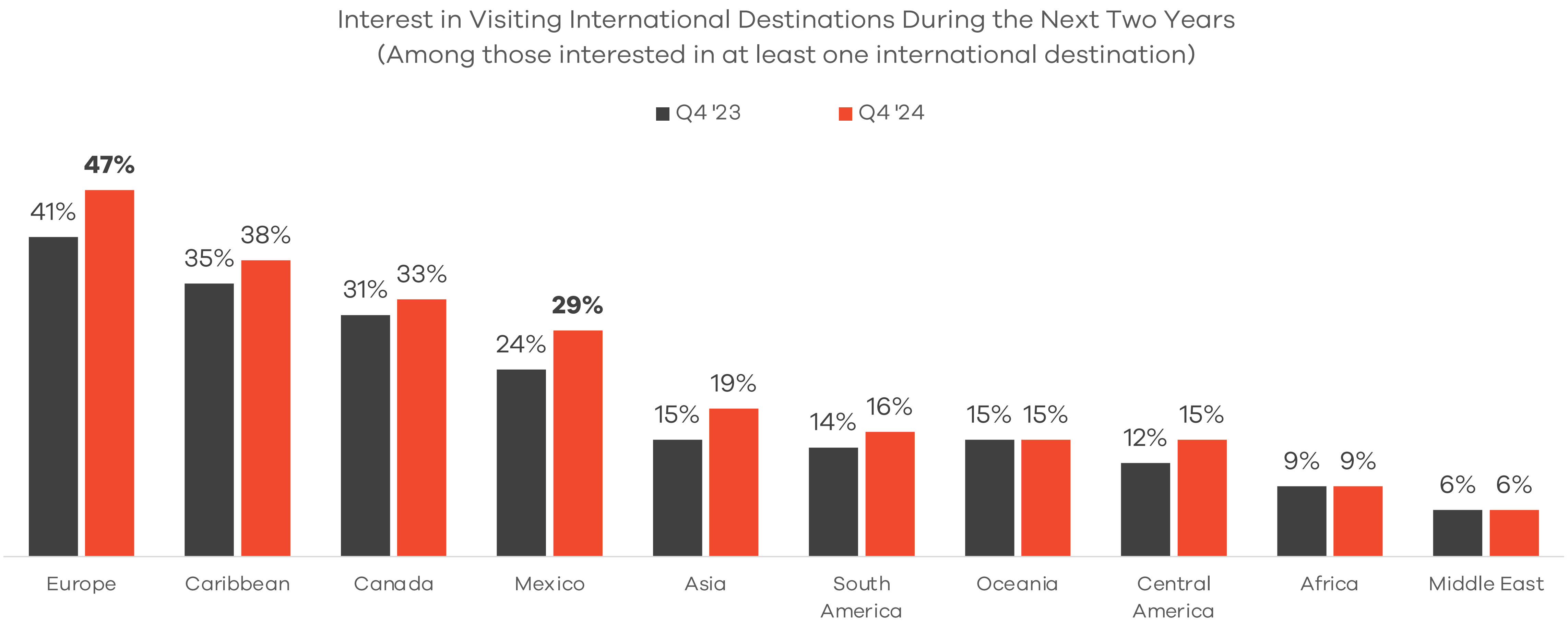
Less Than $100K: 75%
$100K or More: **92%**

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

Key results in red.
Base: Active leisure travelers (n=3,633)
Source: MMGY's 2024 *Portrait of American Travelers®* "Winter Edition"

MMGY Travel Intelligence

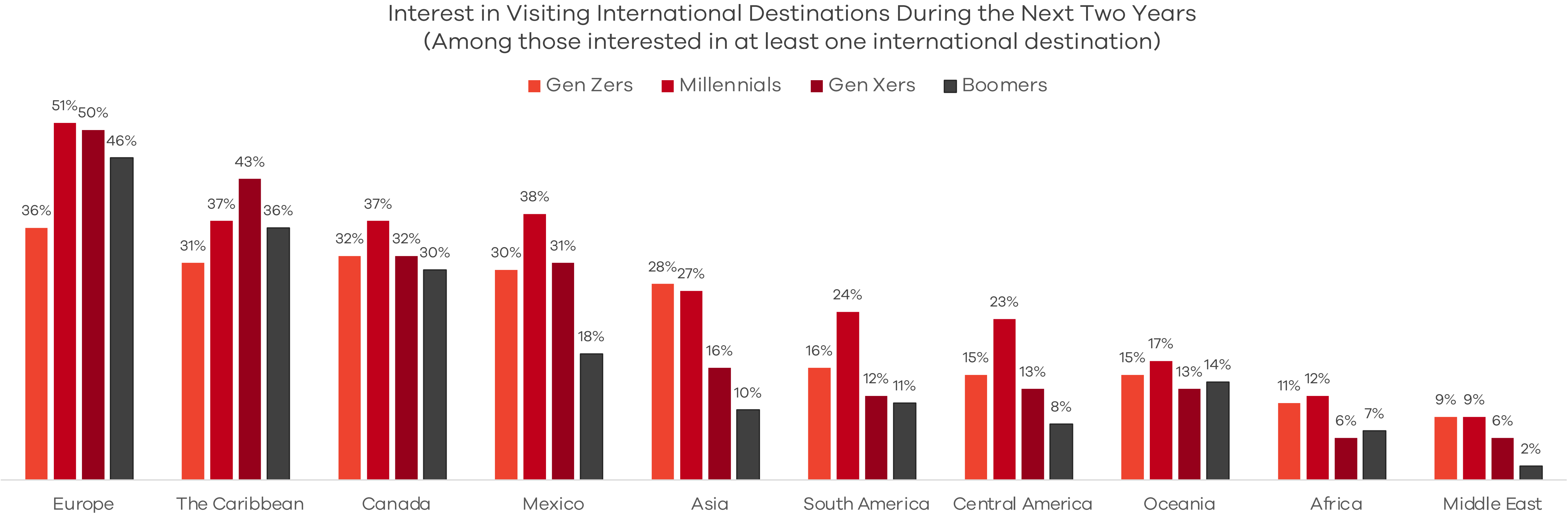
Europe and Mexico both saw a significant increase in interest from 2023. Interest in the Caribbean and Canada was also high.



Base: Active leisure travelers interested in at least one international destination (n=3,052)
Source: MMGY's 2024 *Portrait of American Travelers®* "Winter Edition"

Europe was the top destination for all generations.

/ Younger travelers, particularly Millennials, prefer to visit less popular destinations, while older travelers prefer to visit more familiar locations, including Europe and the Caribbean.



Base: Active leisure travelers interested in at least one international destination (Gen Zers: n=418; Millennials: n=1,009; Gen Xers: n=779; Boomers: n=772)

Source: MMGY's 2024 *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 '23	Q4 '24
The Bahamas	56%	59%
U.S. Virgin Islands	47%	50%
Puerto Rico	39%	39%
Aruba	31%	**38%**
St. Maarten/St. Martin	29%	**38%**
Jamaica	40%	35%
Cayman Islands	37%	34%
Dominican Republic	27%	32%
Barbados	29%	29%
British Virgin Islands	26%	28%
Bermuda	27%	26%
Antigua	21%	23%
Cuba	14%	14%
Other	3%	3%

Mexican Destinations Interested in Visiting During the Next Two Years	Q4 '23	Q4 '24
Cancun	56%	59%
Mexico City	36%	**43%**
Los Cabos/Cabo San Lucas	38%	42%
Puerto Vallarta	35%	36%
Cozumel	34%	33%
Riviera Maya	23%	**33%**
Guadalajara	18%	17%
Other	5%	7%

Canadian Destinations Interested in Visiting During the Next Two Years	Q4 '23	Q4 '24
Toronto	55%	58%
Vancouver	54%	51%
Niagara Falls	45%	46%
Montreal	45%	49%
Quebec	40%	40%
Victoria	24%	25%
Ottawa	19%	16%
Banff	20%	25%
Whistler	14%	16%
Other	4%	5%

Data in bold indicates a statistically significant difference from Q4 2023.
Base: Active leisure travelers interested in visiting the Caribbean (n=1,345); Mexico (n=1,080); Canada (n=1,281)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

Respondent Demographics

MMGY Travel Intelligence

Traveler Personas

Percent Who Self-Identify With Each Descriptor

	Q4 '23	Q4 '24
Beach lover	49%	48%
Foodie	41%	43%
Pet lover	42%	39%
Family traveler	38%	38%
Travel bargain hunter	28%	31%
Sports fan/enthusiast	30%	30%
Outdoor adventurer	29%	30%
Moderate (politically)	21%	25%
Concert/festival enthusiast	23%	24%
All-inclusive resort enthusiast	21%	24%
Theme park enthusiast	23%	24%
World traveler	20%	24%
Conservative (politically)	25%	22%
Environmentally conscious	18%	22%
Cruise lover	21%	21%
Liberal (politically)	18%	20%
Luxury traveler	18%	19%
Wine enthusiast	19%	19%
Cocktail enthusiast	16%	18%
Video game enthusiast	16%	16%
Recreational cannabis user	13%	12%
Golf enthusiast	10%	8%
Social justice activist	8%	8%
Ski/snowboard enthusiast	6%	7%
Road warrior (business travel)	6%	5%

Base: Active leisure travelers (n=3,633)
Source: MMGY's 2024 *Portrait of American Travelers®* "Winter Edition"

MMGY Travel Intelligence

Respondent Demographics

	Active Leisure Travelers	Gen Zers	Millennials	Gen Xers	Boomers
Male	50%	47%	48%	50%	54%
Female	49%	48%	50%	50%	46%
Other	1%	5%	2%	0%	0%
Gen Zers	13%	100%	-	-	-
Millennials	30%	-	100%	-	-
Gen Xers	26%	-	-	100%	-
Boomers	29%	-	-	-	100%
Household income (median)	$103.7K	$76.8K	$111.8K	$124K	$95.6K
Have children under 18 at home	32%	26%	60%	37%	4%
White	77%	60%	71%	78%	89%
Hispanic	17%	14%	23%	19%	10%
African American/Black	13%	24%	17%	10%	6%
Asian	8%	11%	9%	10%	3%
Native American	2%	3%	3%	2%	0%
Pacific Islander	0%	3%	0%	0%	0%
Other	2%	2%	3%	2%	2%

Base: Active leisure travelers (n=3,633)
Source: MMGY's 2024 *Portrait of American Travelers*® "Winter Edition"

Respondent Demographics

	Active Leisure Travelers	Gen Zers	Millennials	Gen Xers	Boomers
Married/living together	64%	38%	66%	69%	71%
Never married	22%	59%	29%	14%	7%
Divorced/separated/widowed	14%	4%	5%	17%	22%
4 years or less of high school	31%	53%	28%	27%	28%
1–3 years of college	28%	24%	21%	29%	36%
4 years of college	26%	15%	33%	28%	23%
Some graduate school	3%	3%	2%	3%	3%
Graduate/professional degree	12%	5%	16%	13%	11%
Employed (full time or part time)	64%	68%	86%	77%	29%
Retired	24%	0%	0%	9%	67%
Temporarily unemployed	4%	9%	5%	5%	1%
Homemaker (full time)	6%	3%	8%	9%	2%
Student	3%	20%	1%	0%	0%

Base: Active leisure travelers (n=3,633)
Source: MMGY's 2024 *Portrait of American Travelers®* "Winter Edition"

MMGY Travel Intelligence

THANK YOU

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