PORTRAIT OF AMERICAN TRAVELERS®

Fall 2024

TRENDS FORUM

MMGY Travel Intelligence

Global Insights for a Global Company

USA

- Kansas City
- Washington, D.C.
- New York City

International

- London
- Paris
- Brussels
- Tokyo
- Calgary
- Vancouver

MMGY Travel Intelligence

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Methodology

- Random sample of 4,501 U.S. adults, all interviewed in August 2024
- Results include data from a total of 3,647 active leisure travelers (N12M)
- 20-minute online survey
- Results are balanced by statistical weighting to ensure the data is representative of all leisure travelers in America.
- The error interval of the statistical estimates appearing in this report (for n=3,647) is +/- 1.68% at the 95% level of confidence.

Travel Outlook Snapshot

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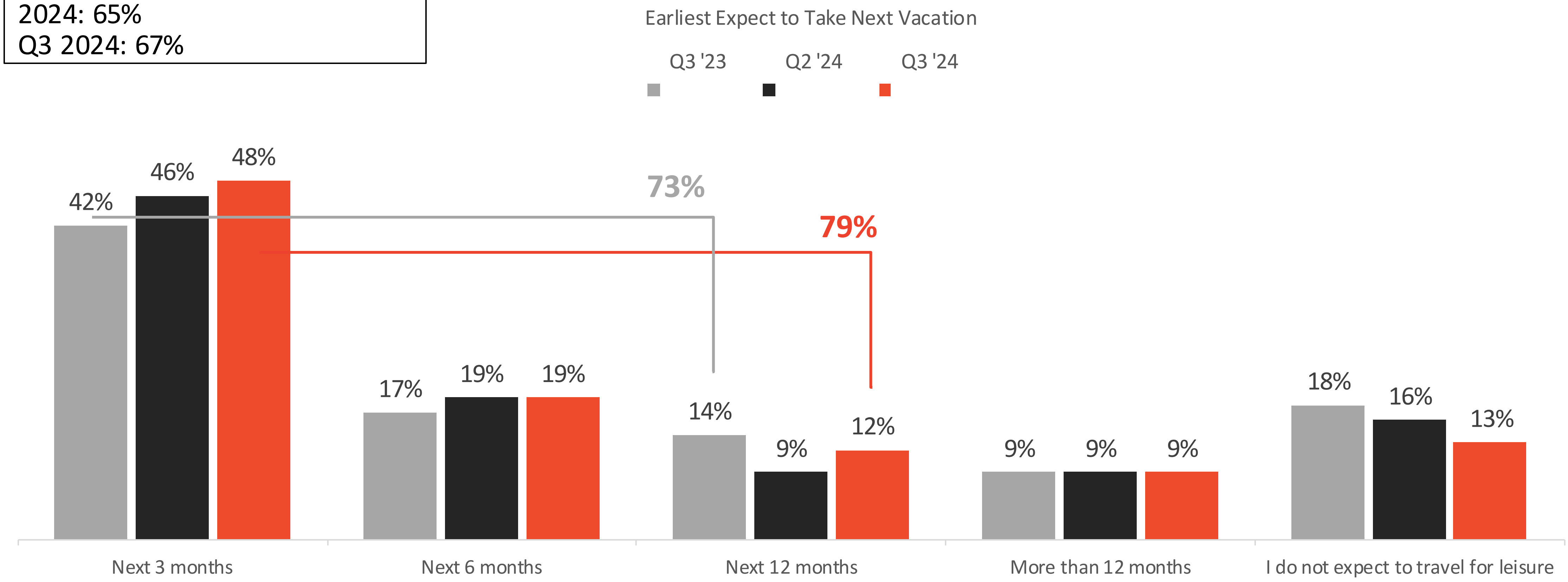
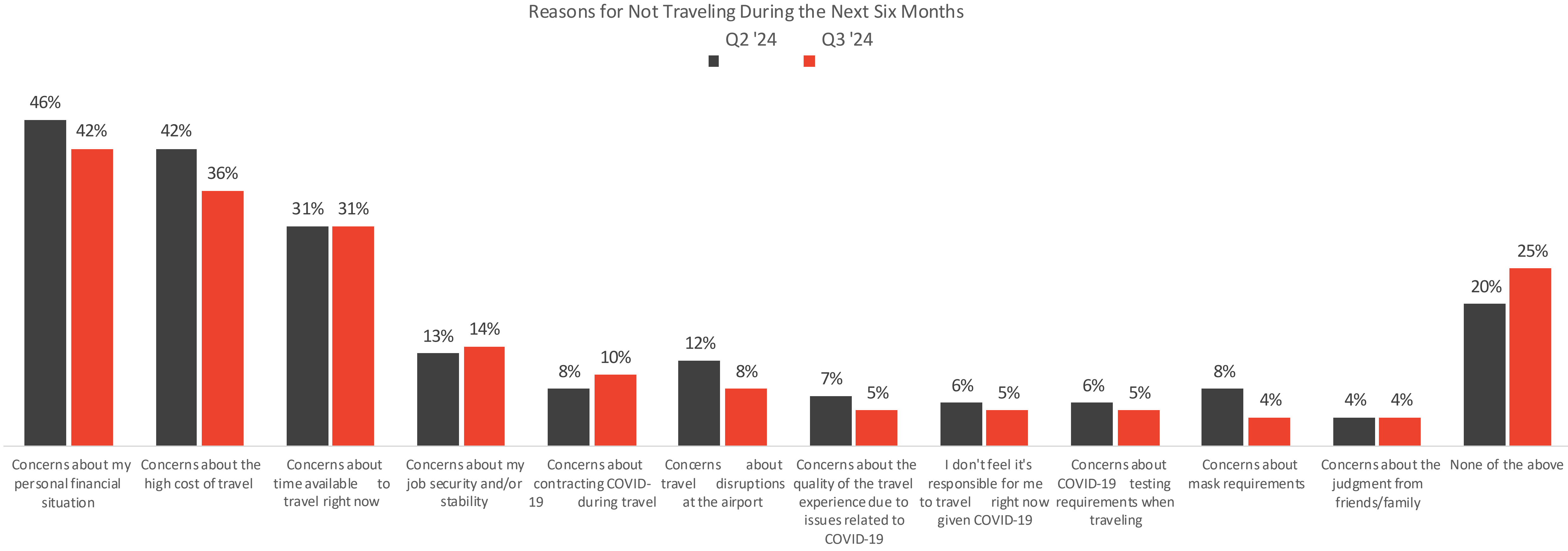
Despite the Summer Travel Season Coming to an End, Short-Term Travel Intentions Have Increased Slightly – Intentions Have Also Increased Compared to This Time Last Year.

<u>Sum of Next 6 Months</u> Q2 2024: 65%
Q3 2024: 67%



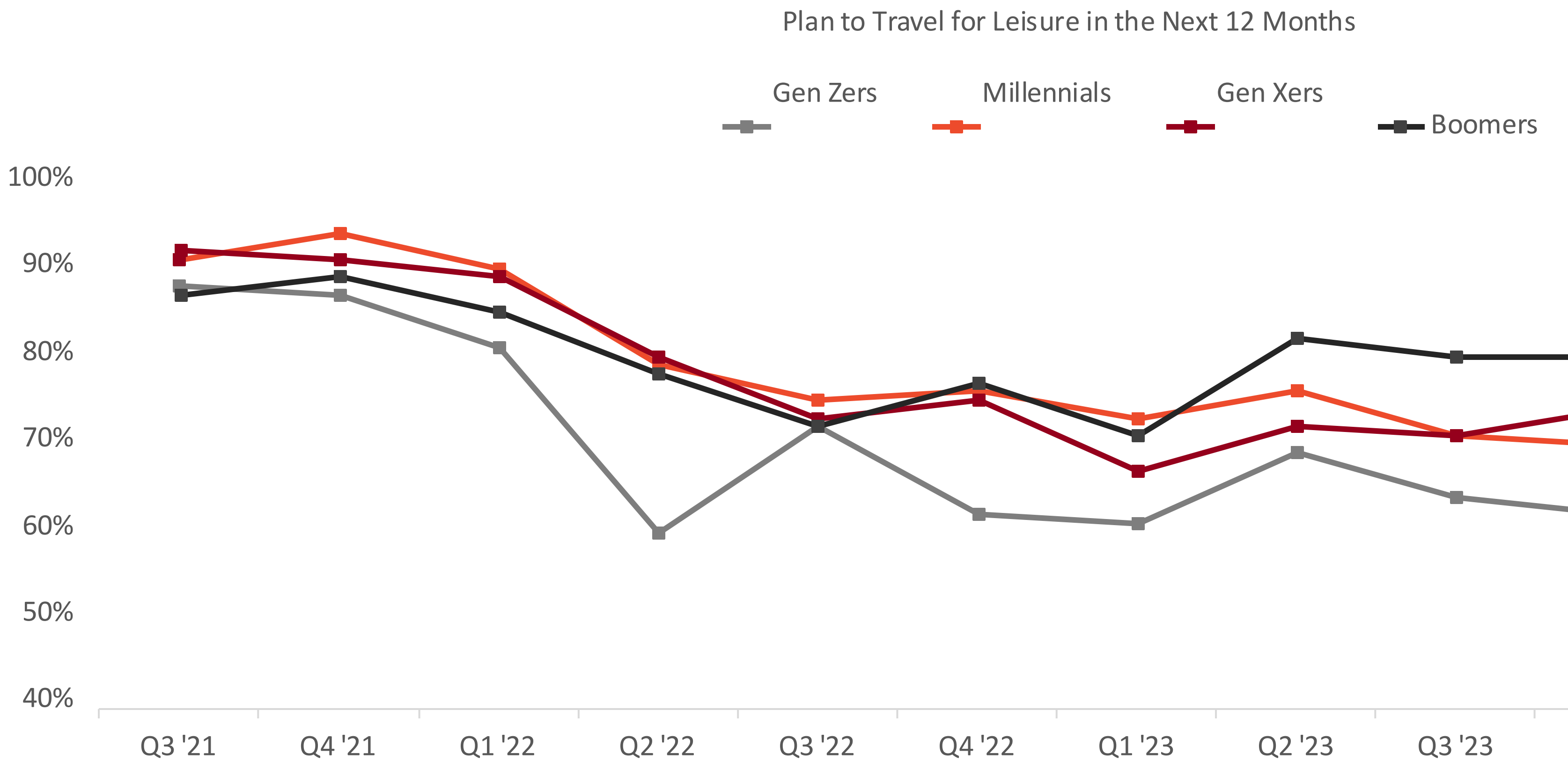
Base: U.S. adults (n=4,501)
Source: MMGY's 2024 *Portrait of American Travelers*®" Fall Edition"

Concerns About Traveling Have Generally Decreased Compared to the Previous Wave - Particularly Concerns About the Associated Costs of Doing So.



Base: Active leisure travelers without travel plans during the next six months (n=1,384)
Source: MMGY's 2024 *Portrait of American Travelers®* "Fall Edition"

Gen Zer's Interest in Travel Has Risen After Four Quarters of Consecutive Decline.



YOY	Q3 '23	Q3 '24
Gen Zers	64%	67%
Millennials	71%	77%
Gen Xers	71%	81%
Boomers	80%	85%

Base: U.S. adults (Gen Zers: n=637; Millennials: n=1,298; Gen Xers: n=1,063; Boomers: n=1,282)
Source: MMGY's 2024 *Portrait of American Travelers*® "Fall Edition"

Many Travelers Have Increased Their Travel Budgets Because of the Increasing Costs of Food, Beverages and Accommodation Compared to a Few Years Ago.

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.

Factors That Have Contributed to Increase in Travel Budget	Q3 '23	Q3 '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.	55%	57%
I expect to spend more because vacation lodging/accommodations seem to cost more now than they did a few years ago.	54%	56%
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.	42%	42%
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.	28%	28%
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%	24%

Base: Active leisure travelers (n=3,647); 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=2,260)

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

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Where People
Want to Visit
MMGY
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Destinations Interested in Visiting During the Next Two Years

States

Rank	State	% Interested
1	Hawaii	**68%** ▲
2	Florida	63%
3	Colorado	58%
4	California	57%
5	Alaska	56%
6	New York	53%
7	Arizona	46%
8	Texas	45%
9	Nevada	44%
10	North Carolina	41%

Destinations

Rank	Destination	% Interested
1	Island of Hawaii	**59%** ▲
2	Honolulu, HI (including Waikiki)	**58%** ▲
3	Maui, HI	**57%** ▲
4	Las Vegas, NV	55%
5	Kauai, HI	**55%** ▲
5	Florida Keys/Key West, FL	54%
7	New York City, NY	50%
8	Orlando, FL	49%
8	Lanai, HI	**49%** ▲
10	San Diego, CA	47%

▲ Displayed a statistically significant increase compared to Q3 2023

Data in bold indicates a statistically significant difference from Q3 2023.
Base: Active leisure travelers (n=3,647)
Source: MMGY's 2024 *Portrait of American Travelers®* "Fall Edition"

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Top 10 Destinations of Interest by Generation

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

Gen Zers	
1	Island of Hawaii
2	New York City, NY
2	Miami, FL
2	Los Angeles, CA
5	Honolulu, HI
6	Maui, HI
6	Orlando, FL
6	Palm Beach, FL
9	Kauai, HI
9	Las Vegas, NV

Millennials	
1	Island of Hawaii
2	Honolulu, HI
3	Maui, HI
4	Las Vegas, NV
5	New York City, NY
5	Kauai, HI
7	Orlando, FL
8	Los Angeles, CA
8	Florida Keys/Key West, FL
9	Miami, FL
9	Lanai, HI

Gen Xers	
1	Island of Hawaii
2	Honolulu, HI
3	Maui, HI
4	Kauai, HI
5	Las Vegas, NV
6	Florida Keys/Key West, FL
7	Lanai, HI
8	New York City, NY
9	San Diego, CA
10	Orlando, FL

Boomers	
1	Florida Keys/Key West, FL
2	Maui, HI
3	Honolulu, HI
4	Island of Hawai'i
4	Kauai, HI
6	Las Vegas, NV
7	Lanai, HI
7	Tampa/St. Petersburg/Clearwater, FL
9	Myrtle Beach, SC
10	Nashville, TN

Base: Active leisure travelers (Gen Zers: n=523; Millennials: n=1,006; Gen Xers: n=962; Boomers: n=1,041)
Source: MMGY's 2024 *Portrait of American Travelers*® "Fall Edition"

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Culinary Travel

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A Look at the Culinary Traveler.

An active leisure traveler who is extremely influenced (Top Box) by perceptions of the quality of the culinary scene when choosing where to stay in a destination.

12% of All Active Leisure Travelers

4.2 Average Number of Leisure Trips in Next 12 Months

$4,657 Average Spend on Leisure Travel in Next 12 Months

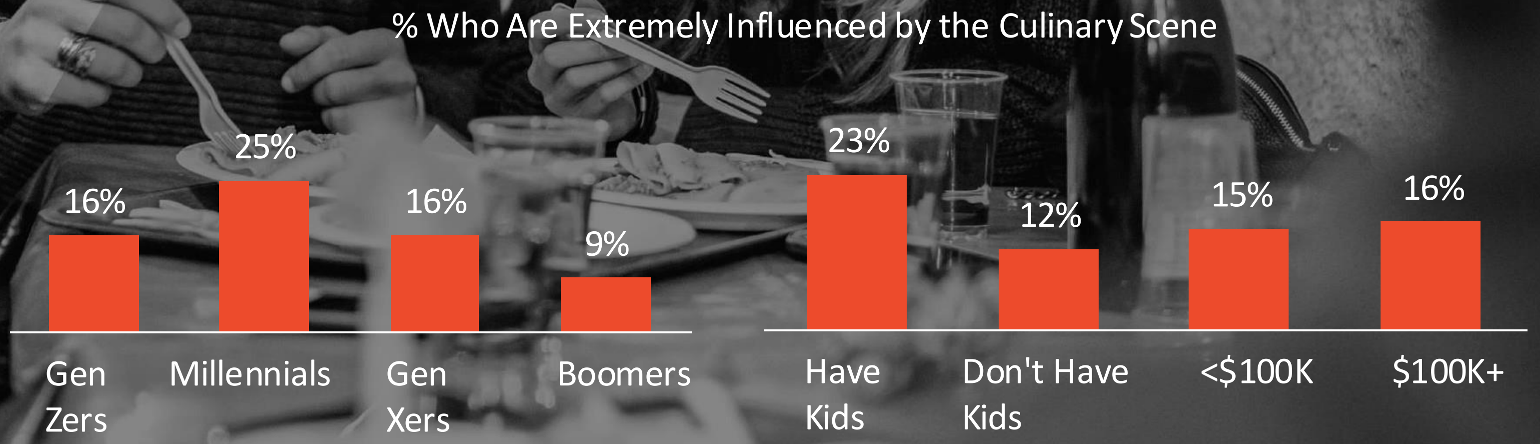
Top Motivations to Travel:

- Experiencing new cuisines (89%)
- The desire to get away and unplug (87%)
- Experiencing different cultures (85%)
- Spending time with significant others (84%)

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

Top Destinations of Interest:

- Honolulu (71%)
- Las Vegas (70%)
- New Orleans (66%)
- New York City (64%)
- Orlando (63%)
- Florida Keys (63%)



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

54% 2023 **56%** 2024

of active leisure travelers are influenced by their perceptions of the quality of the culinary scene when choosing where to stay within a destination. (Top 2 Box)

Gen Zers: **63%**
Millennials: **66%**
Gen Xers: **59%**
Boomers: 44%

Have Kids: **64%**
Don't Have Kids: 53%

Less Than $100K: 54%
$100K or More: 58%

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

Base: Active leisure travelers (n=3,647)
Source: MMGY's 2024 *Portrait of American Travelers®* "Fall Edition"

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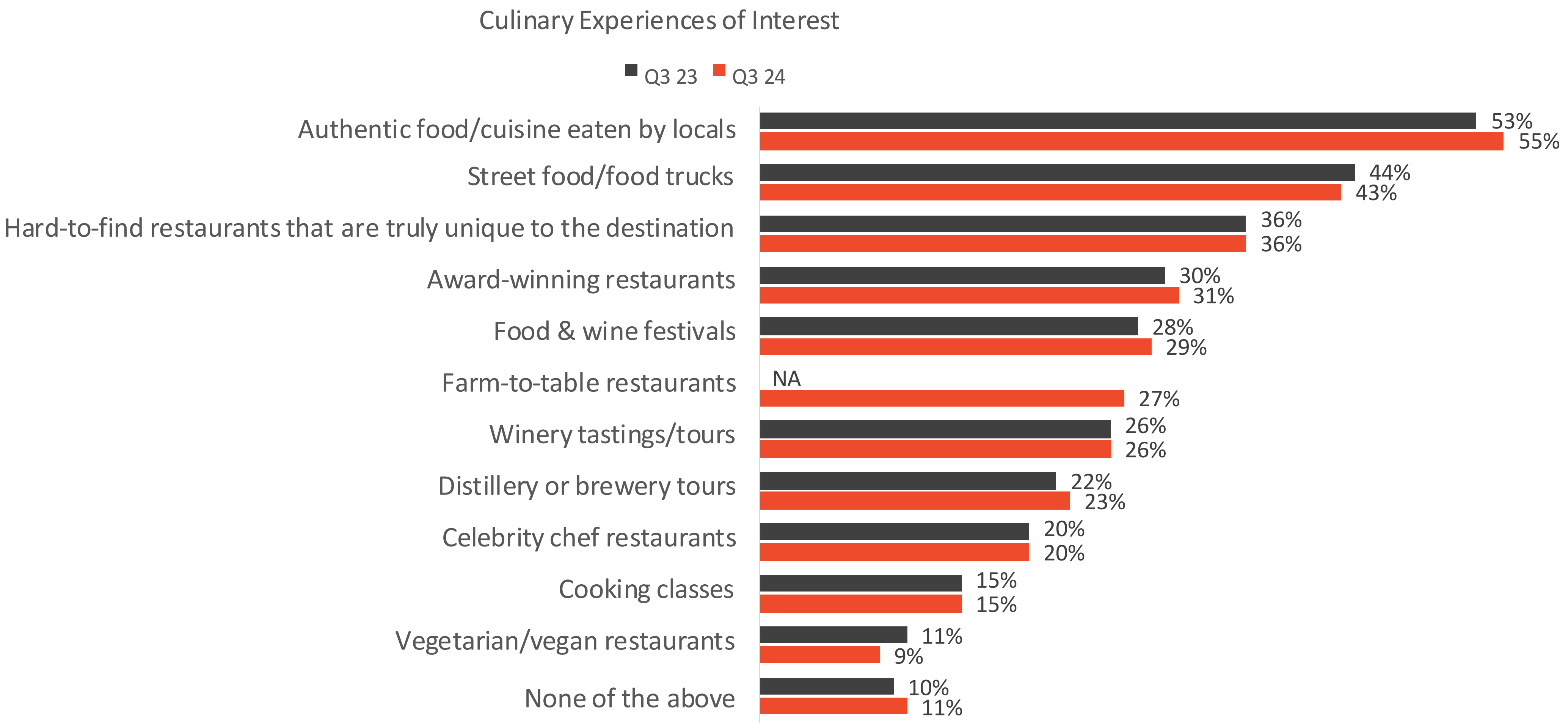
Although Authentic Cuisine Is Still the Top Culinary Experience of Interest, There Is Growing Interest in High-End Culinary Experiences Such as Award-Winning Restaurants and Food & Wine Festivals.



NA: Option was not asked in Q3 2023.

Base: Active leisure travelers (n=3,647)

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

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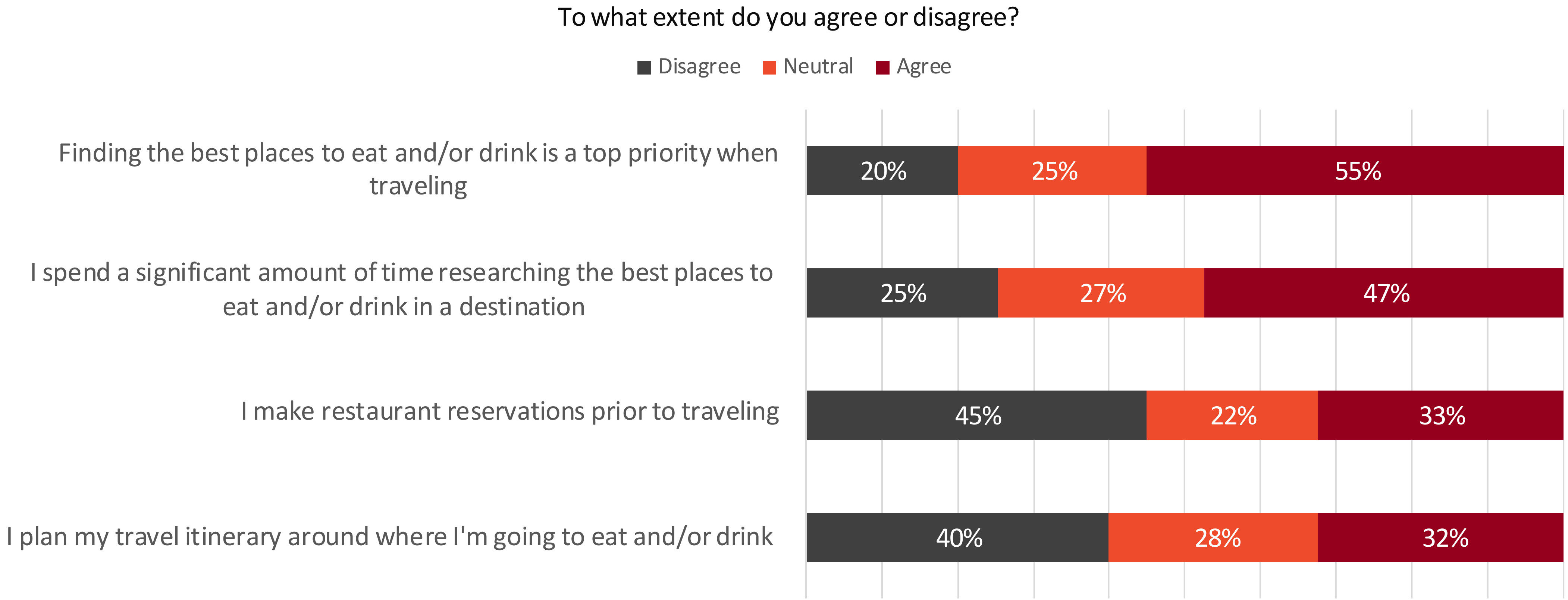
About Half of Active Leisure Travelers Agree That Finding the Best Places to Eat and Drink Is a Top Priority When Traveling, and Just Under Half Spend a Significant Amount of Time Researching These Options in a Destination.



Base: Active leisure travelers (n=3,647)

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

Holiday Travel

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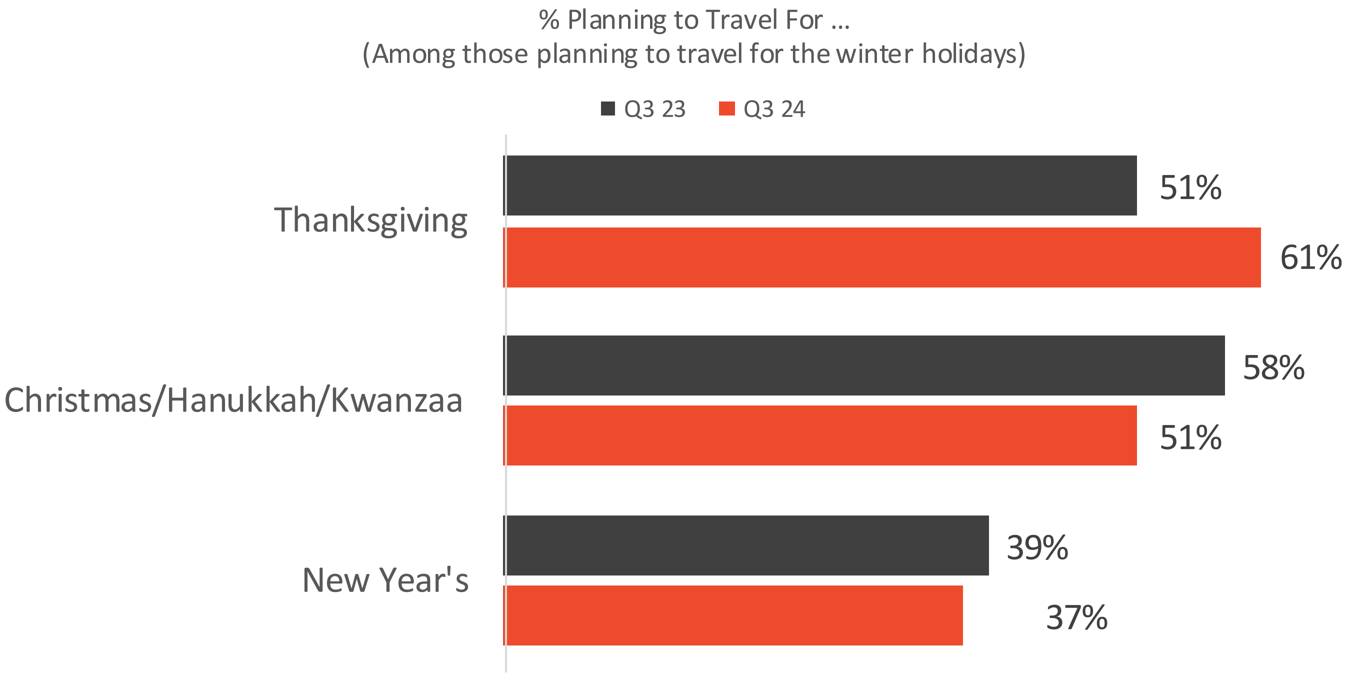
Winter Holiday Travel Plans Are Down Slightly From Last Year.

34% 2023 **33%** 2024

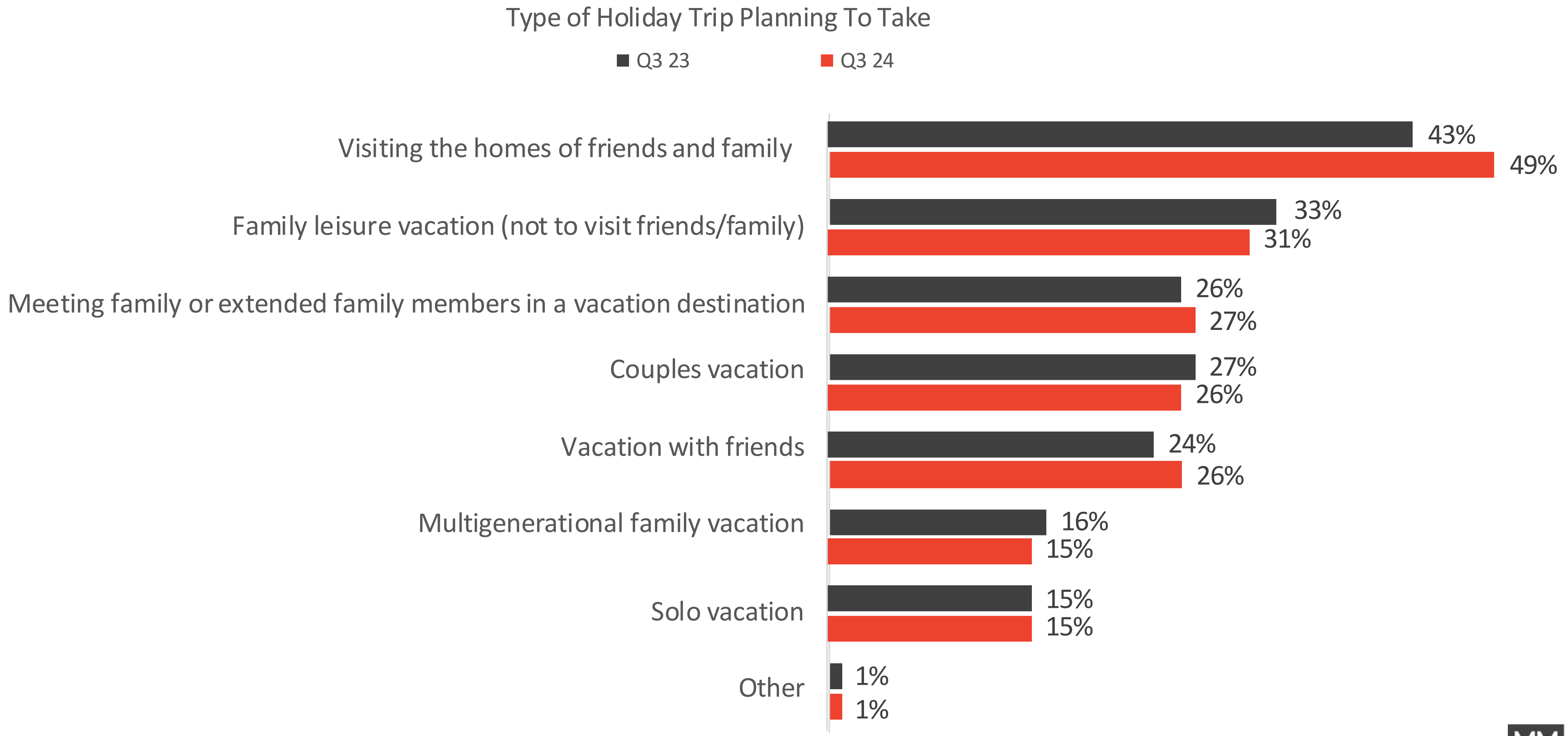
of U.S. adults are planning to travel for the winter holidays.



Base: U.S. adults (n=4,515); those planning to travel for the winter holidays (n=1,616)

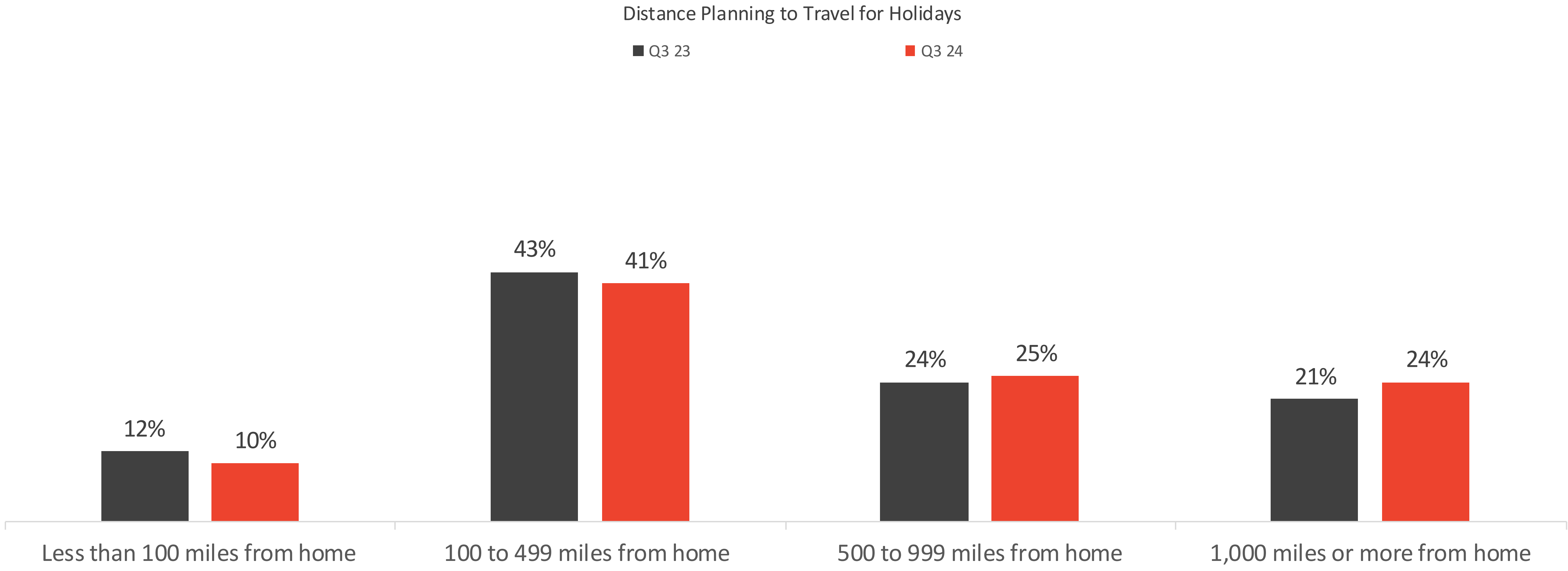
Source: MMGY's 2024 *Portrait of American Travelers*® "Fall Edition"

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



Base: Active leisure travelers who are planning to travel for the holidays (n=1,703)
Source: MMGY's 2024 *Portrait of American Travelers®* "Fall Edition"

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



Base: Active leisure travelers who are planning to travel for the holidays (n=1,703)
Source: MMGY's 2024 *Portrait of American Travelers®* "Fall Edition"

Cruising

Cruising

58%

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

Gen Zers: 61%
Millennials: 64%
Gen Xers: 60%
Boomers: 49%

Have Kids: 66%
Don't Have Kids: 54%

Less Than $100K: 54%
$100K or more: 61%

52%

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

Gen Zers: 43%
Millennials: 56%
Gen Xers: 50%
Boomers: 52%

Have Kids: 57%
Don't Have Kids: 49%

Less Than $100K: 49%
$100K or more: 54%

40%

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

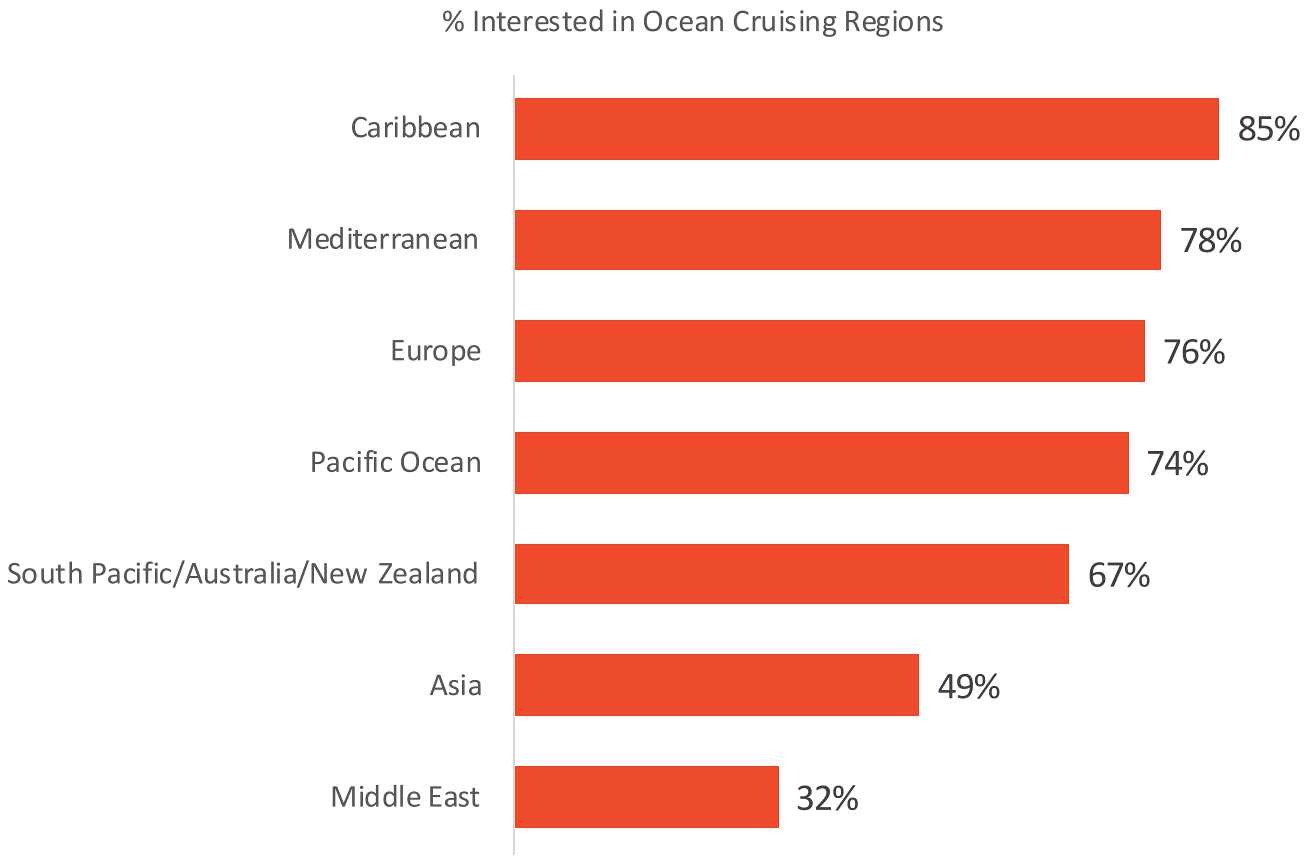
Gen Zers: 43%
Millennials: 51%
Gen Xers: 43%
Boomers: 28%

Have Kids: 53%
Don't Have Kids: 34%

Less Than $100K: 37%
$100K or more: 43%

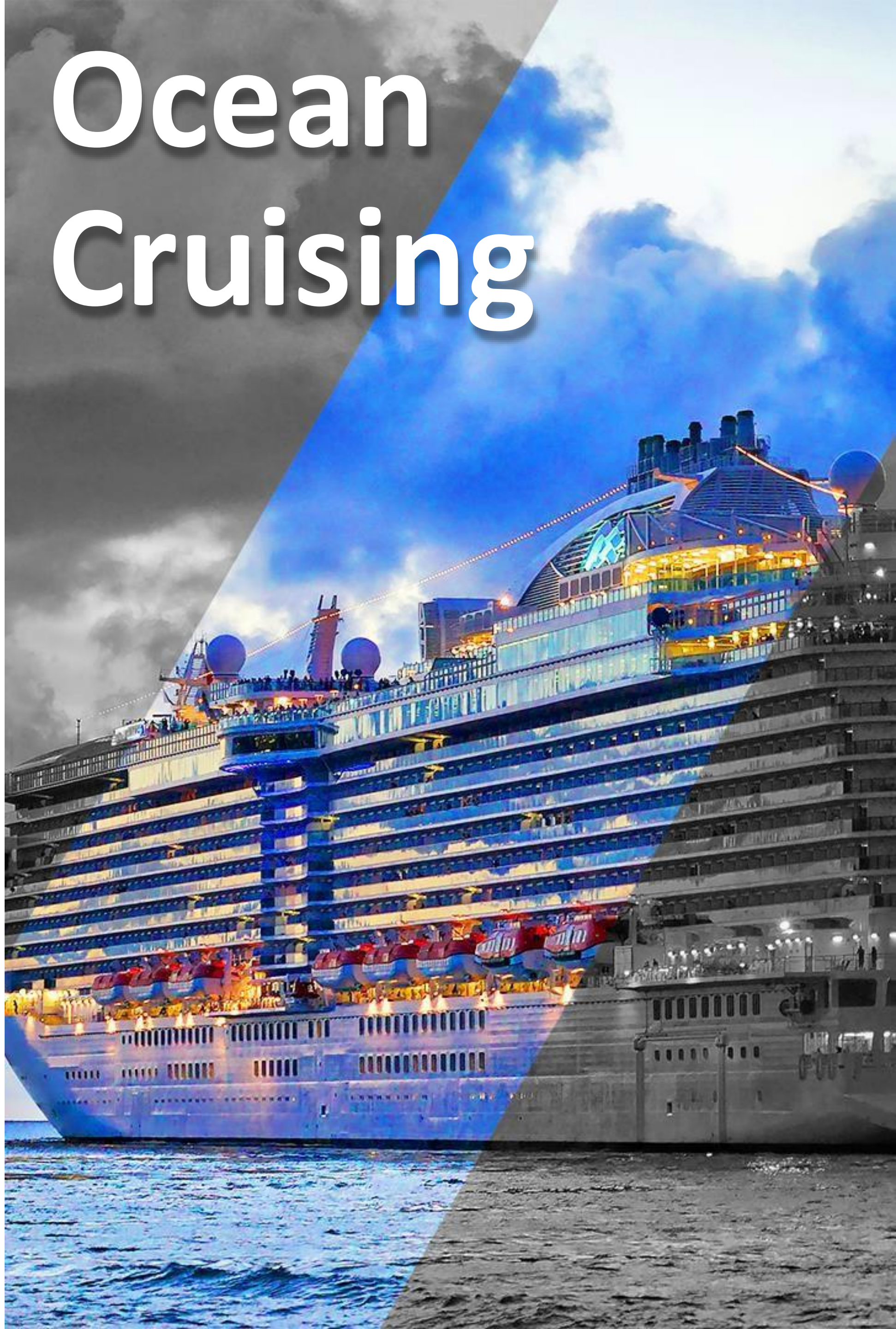
Base: Active leisure travelers (n=3,647)
Source: MMGY's 2024 *Portrait of American Travelers®* "Fall Edition"

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

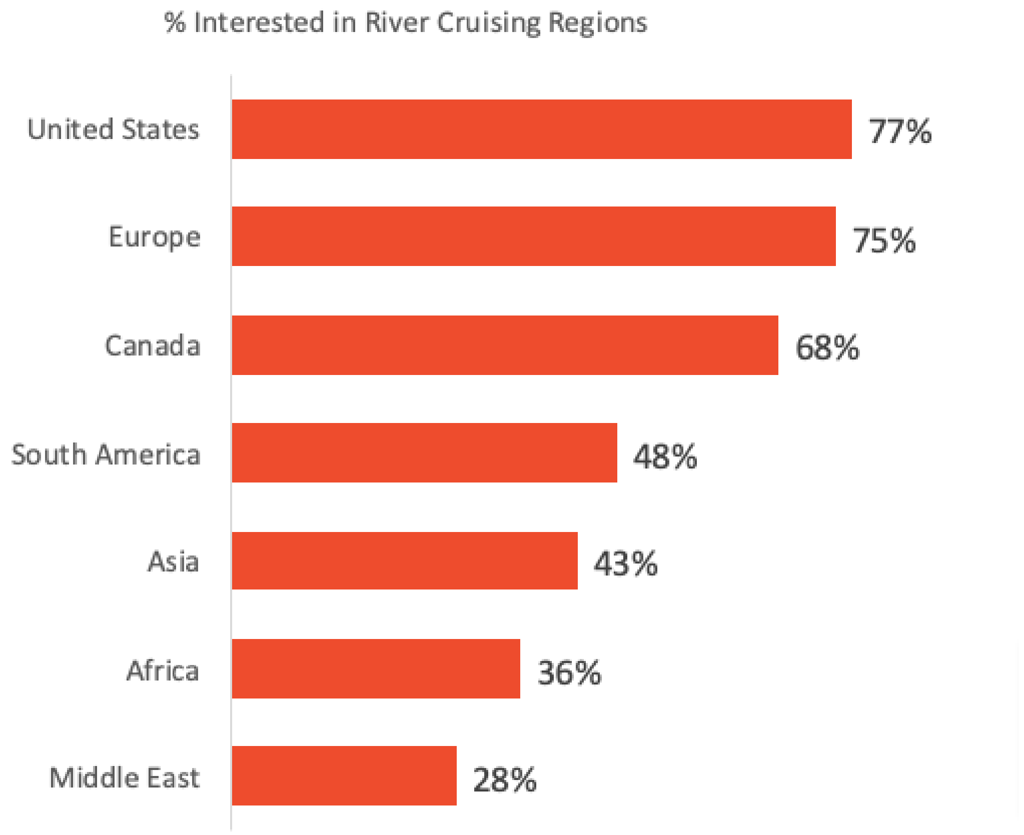


Base: Active leisure travelers interested in ocean cruising (n=2,133)

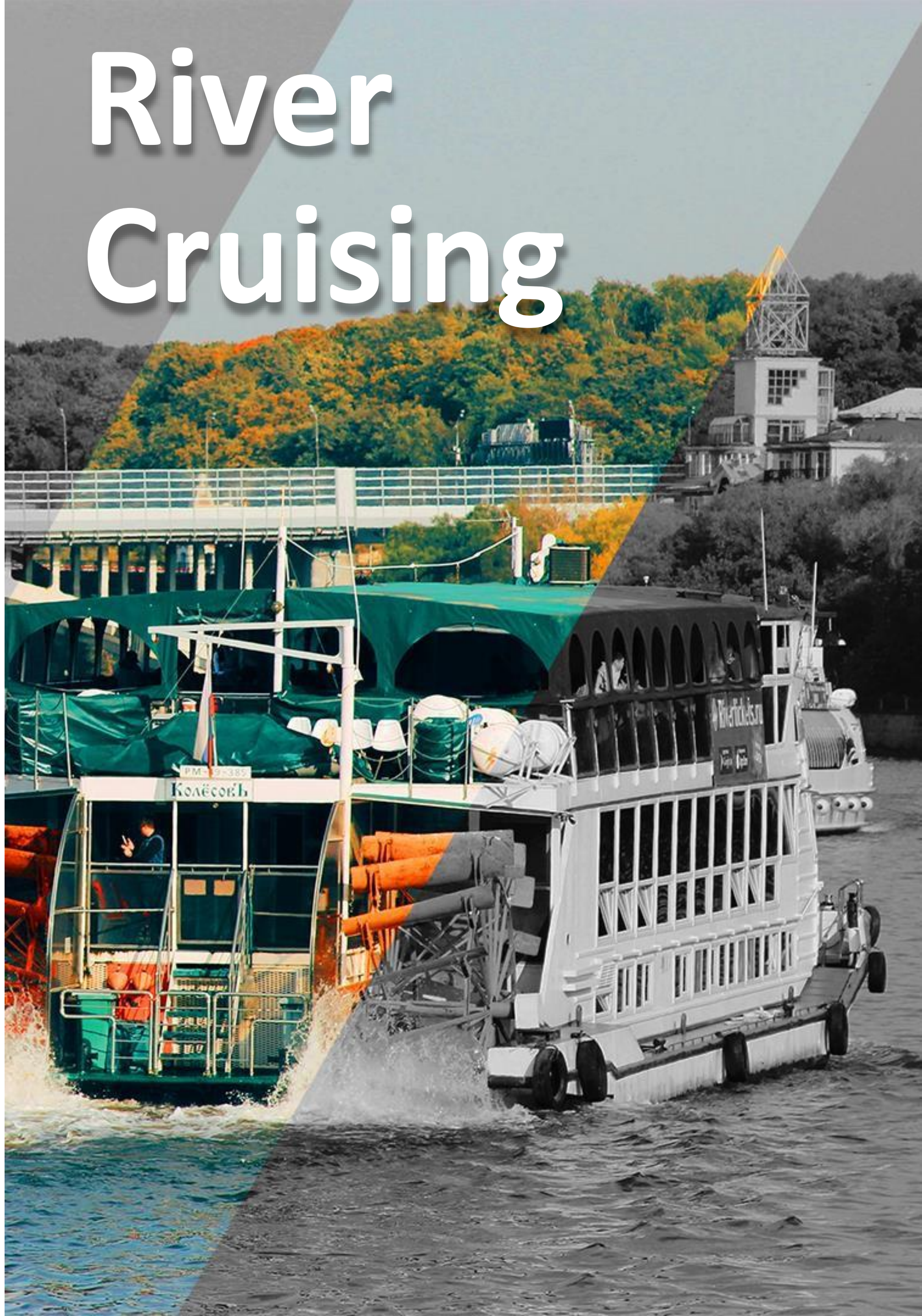
Source: MMGY's 2024 *Portrait of American Travelers®* "Fall Edition"



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



Base: Active leisure travelers interested in river cruising (n=1,942)
Source: MMGY's 2024 *Portrait of American Travelers*® "Fall Edition"



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

Influential When Selecting a Cruise Line	Q3 '24
Safety/cleanliness standards of cruise ship/brand	89%
Quality of the food available onboard	88%
Price of the cruise	87%
Cost/convenience of traveling to/from port of departure	83%
Cabin size/quality	82%
Ports of call/available itineraries	81%
Cruise brand name/reputation	80%
Quality and diversity of excursions available	75%
Size of the cruise ship	73%
Previous positive experience with the cruise line	66%
Luxury accommodations	63%
Nightlife/entertainment options	62%
Proof of vaccination required	45%
Membership in cruise line loyalty program	43%
Availability of onboard gambling	36%
Children's activities	32%

Base: Active leisure travelers interested in cruising (n=2,673)

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

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Vacation Motivators and Activities

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

30%

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

Base: Active leisure travelers (n=3,647); those who have used ChatGPT or another AI tool for travel planning (n=1,073)

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

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

Data in bold indicates a statistically significant difference from Q3 2023.

Base: Active leisure travelers (n=3,647)

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

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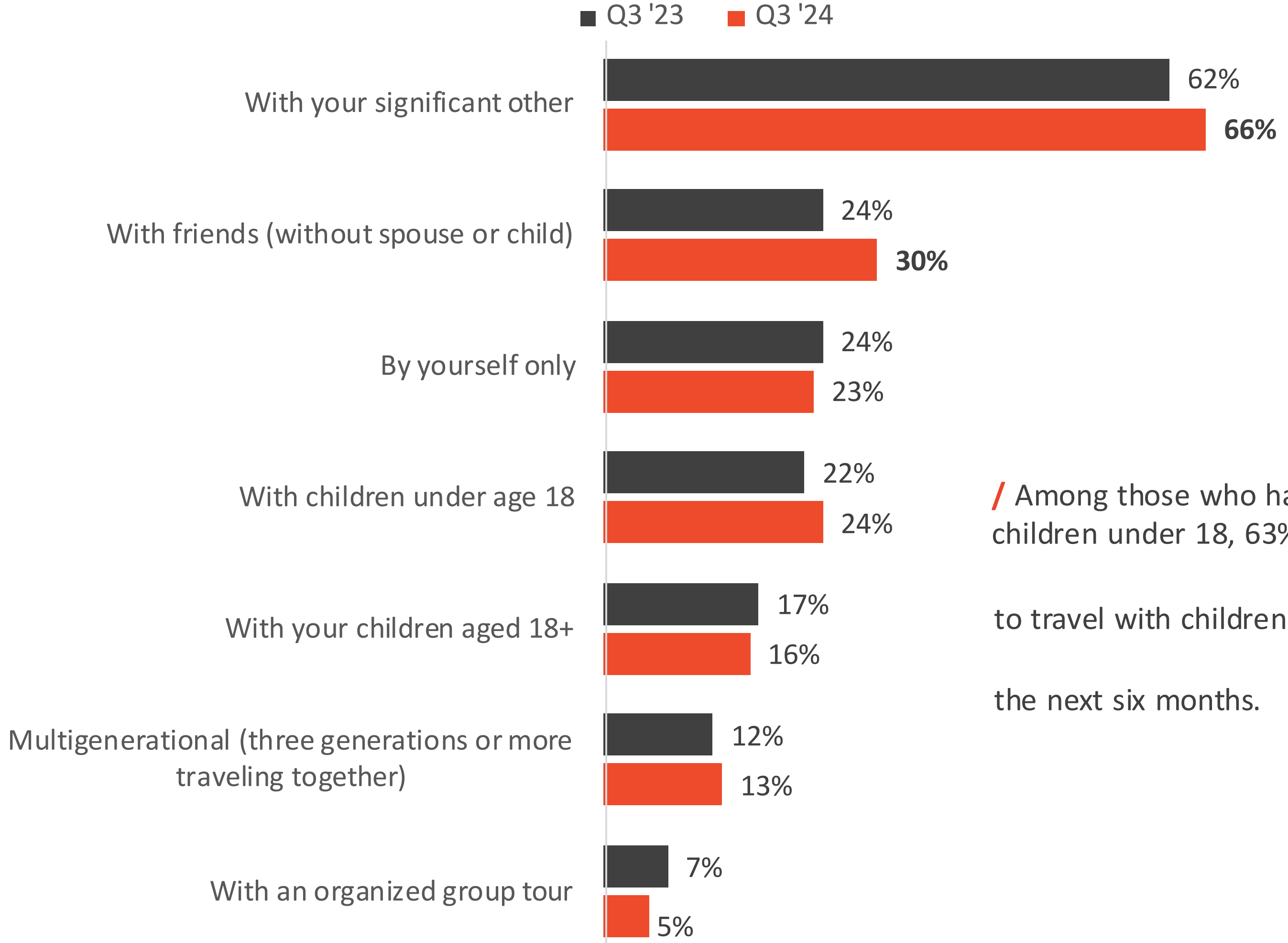
Couples Travel Remains the Most Common Form of Travel.

Travel Party During the Next Six Months



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

Data in bold indicates a statistically significant difference from Q3 2023.

Base: Active leisure travelers who intend to travel during the next six months (n=3,116)

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

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

Top 10 Most Influential When Selecting a Destination (Top 2 Box)	Q3 ’23	Q3 ‘24
Beautiful scenery	70%	**76%**
Safety	57%	60%
Food and drink scene	53%	**60%**
Outdoor/nature activities	48%	**54%**
Historical significance of a destination	45%	**52%**
Focus on family activities	34%	35%
A sense of tradition (place family has traditionally visited)	32%	32%
Music scene	23%	25%
The ethnic diversity and multicultural population of a destination	22%	24%
Nightlife/bars	19%	20%

Data in bold indicates a statistically significant difference from Q3 2023.

Base: Active leisure travelers (n=3,647)

Source: MMGY’s 2024 *Portrait of American Travelers®* "Fall Edition"

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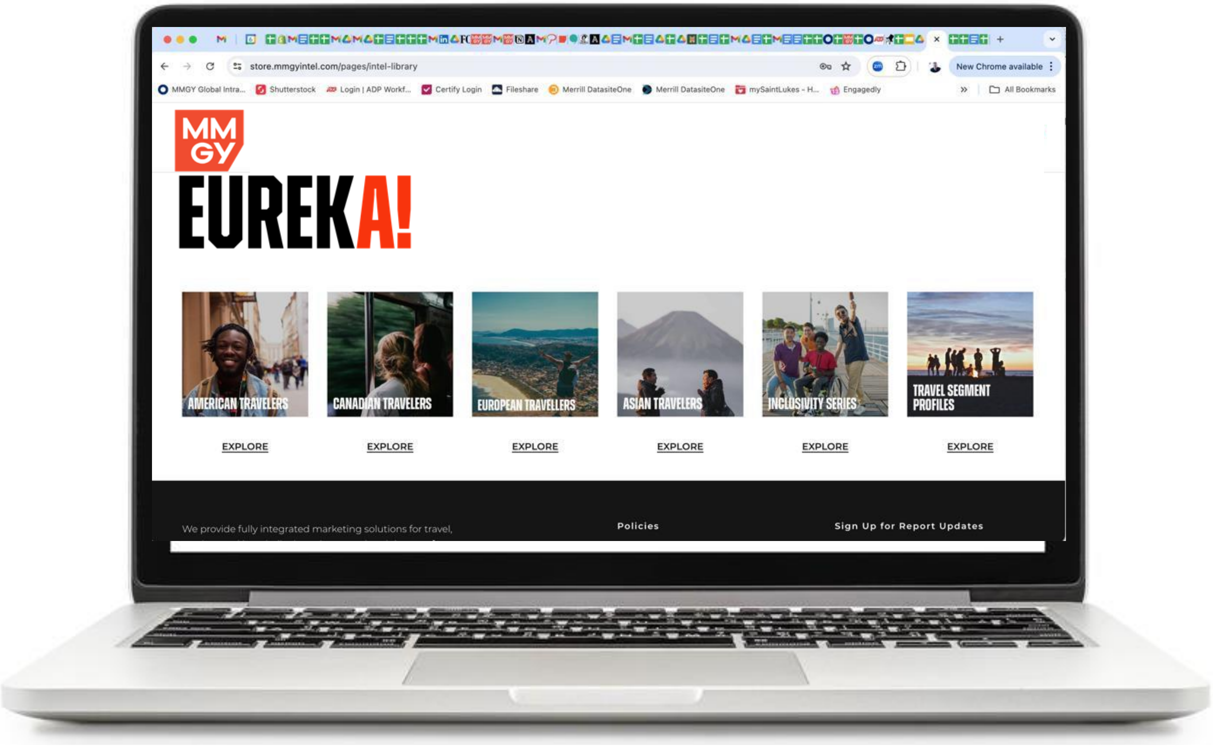
EUREKA!

COMING

IN JANUARY 2025!



- A comprehensive library of MMGY's proprietary syndicated research studies released since 2020
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