

PREVIEW  
EDITION

Winter Edition 2022

# PORTRAIT OF AMERICAN TRAVELLERS<sup>®</sup>

# 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 4,529 U.S. adults in October 2022.

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 3,338 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.

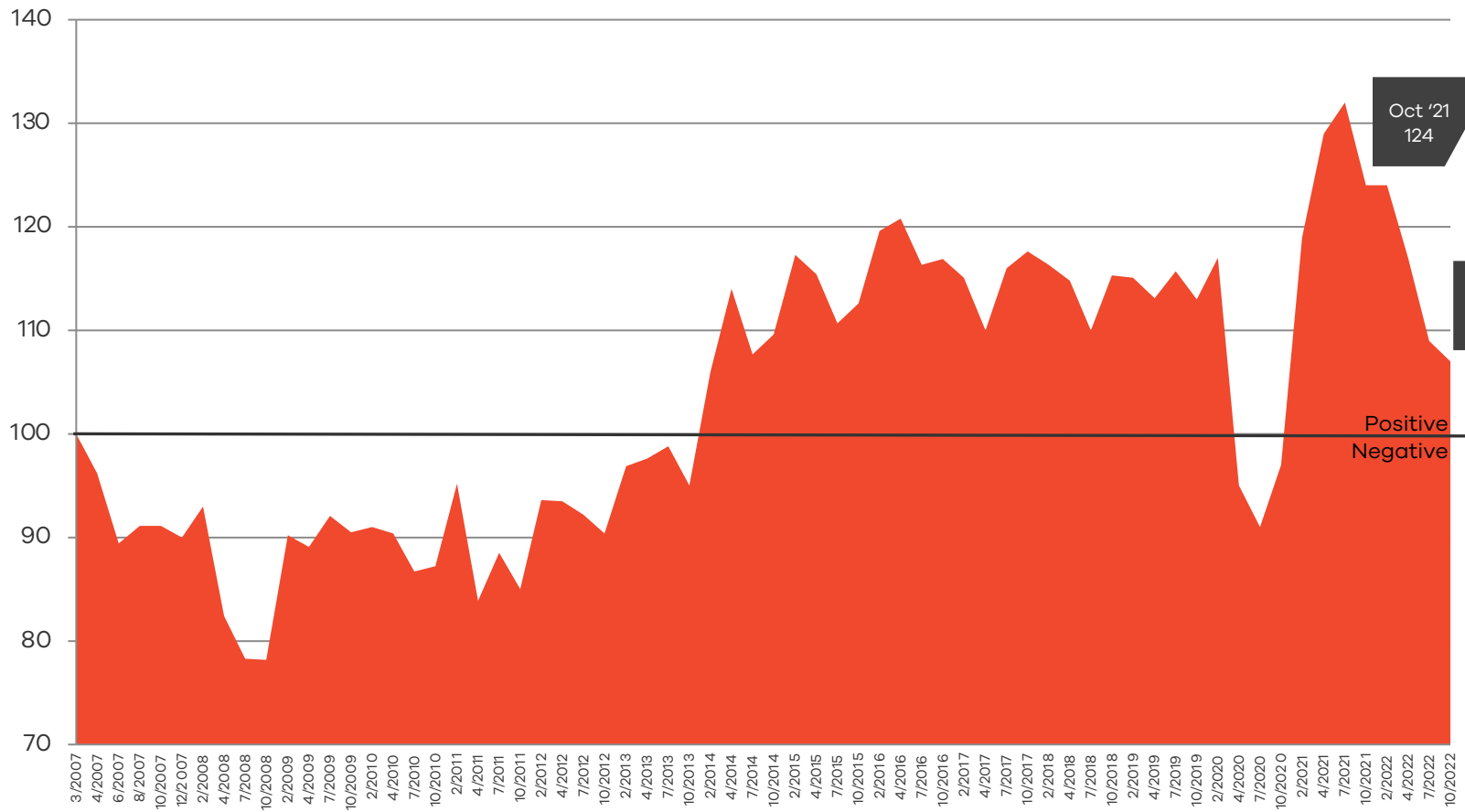
The five generations of adults surveyed are defined below. Due to the small number of Silent/GI respondents, we did not include their individual results in this report.

| Generation  | Age   | % of Respondents |
|-------------|-------|------------------|
| Gen Zs      | 18–24 | 11%              |
| Millennials | 25–40 | 29%              |
| Gen Xers    | 41–56 | 25%              |
| Boomers     | 57–75 | 31%              |
| Silent/GI   | 76+   | 4%               |



# Travel Outlook Snapshot

# Traveler Sentiment Index™ (TSI): Down 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=4,529)  
**Source:** MMGY Global's *travelhorizons*™/2022 *Portrait of American Travelers*® "Winter Edition"

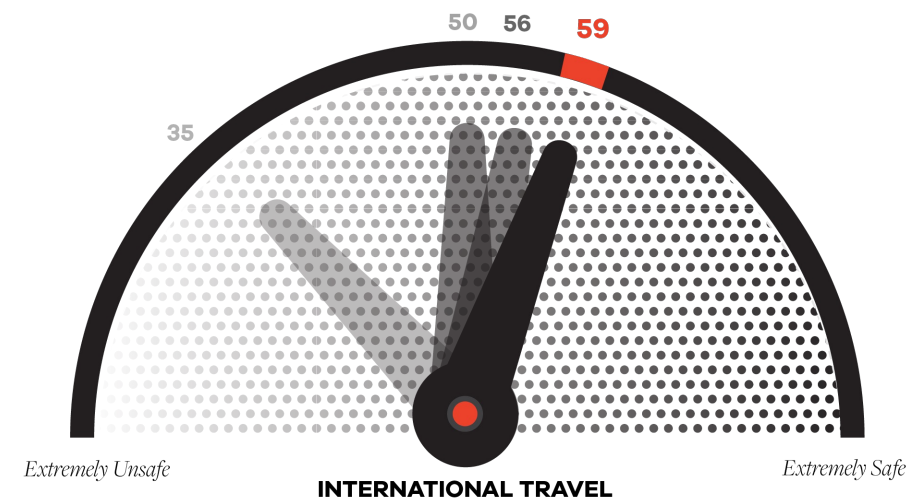
# Perceived Safety of Travel Continues to Increase Since the Start of the Pandemic.

The **MMGY Global Travel Safety Barometer** is a sentiment tracking tool that measures Americans' perceptions of the safety of engaging in specific travel behaviors on a scale from 0 (Extremely Unsafe) to 100 (Extremely Safe).

/ **Perceived safety of domestic travel is up 5 points from one year ago.**



/ **Perceived safety of international travel is up 9 points from one year ago.**



# Travel Intentions Have Declined From One Year Ago While Short-Term Intentions Have Decreased Slightly From Last Quarter.

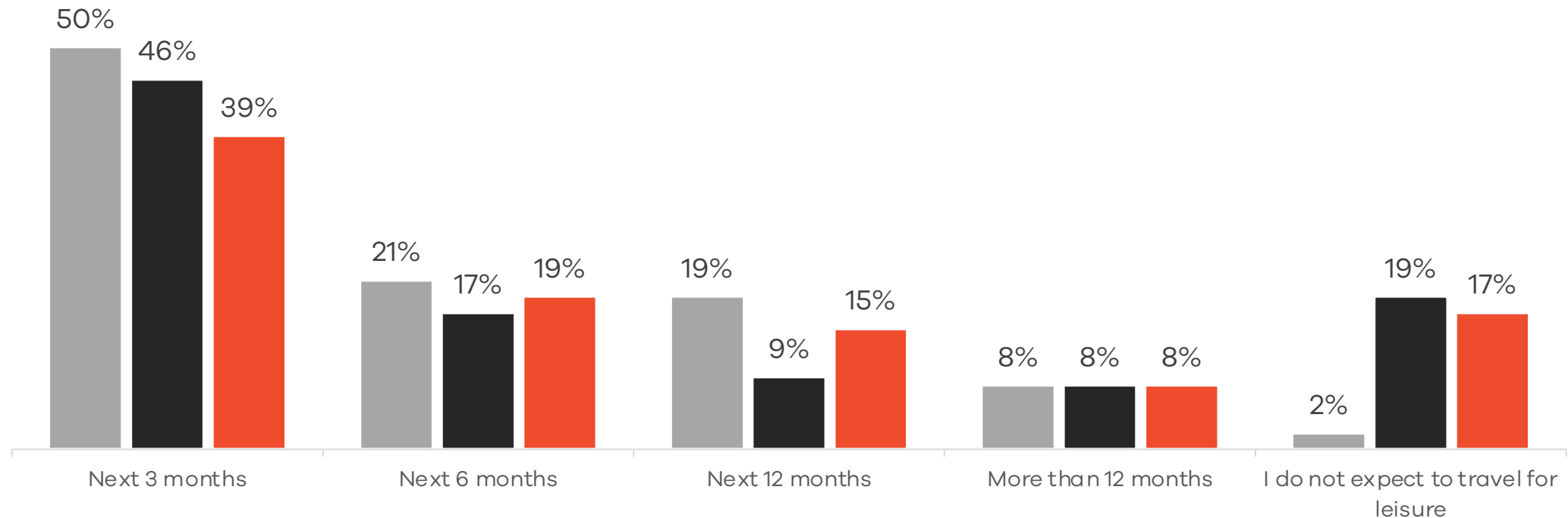
## Sum of Next 6 Months

Oct 2021: 71%

Oct 2022: 58% ▼

## Earliest Expect to Take Next Vacation

■ Oct '21 ■ Jul '22 ■ Oct '22



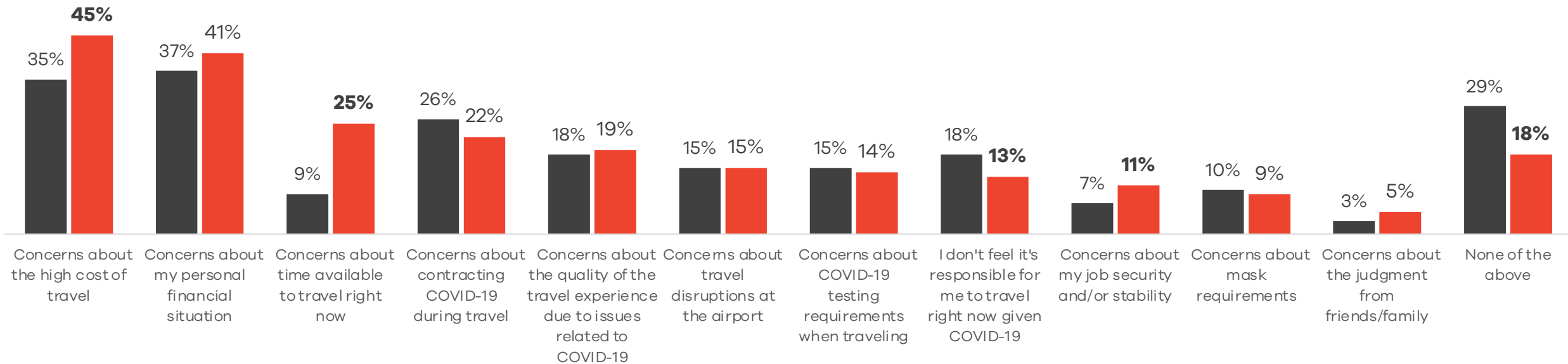
Base: U.S. adults (n=4,529)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

# Concerns About the High Cost of Travel, Personal Finances and Time Available to Travel Have All Increased Significantly From Just Three Months Ago.

Reasons for Not Traveling During the Next Six Months

■ Jul '22 ■ Oct '22



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

**Base:** Active leisure travelers without travel plans during the next six months (n=701)

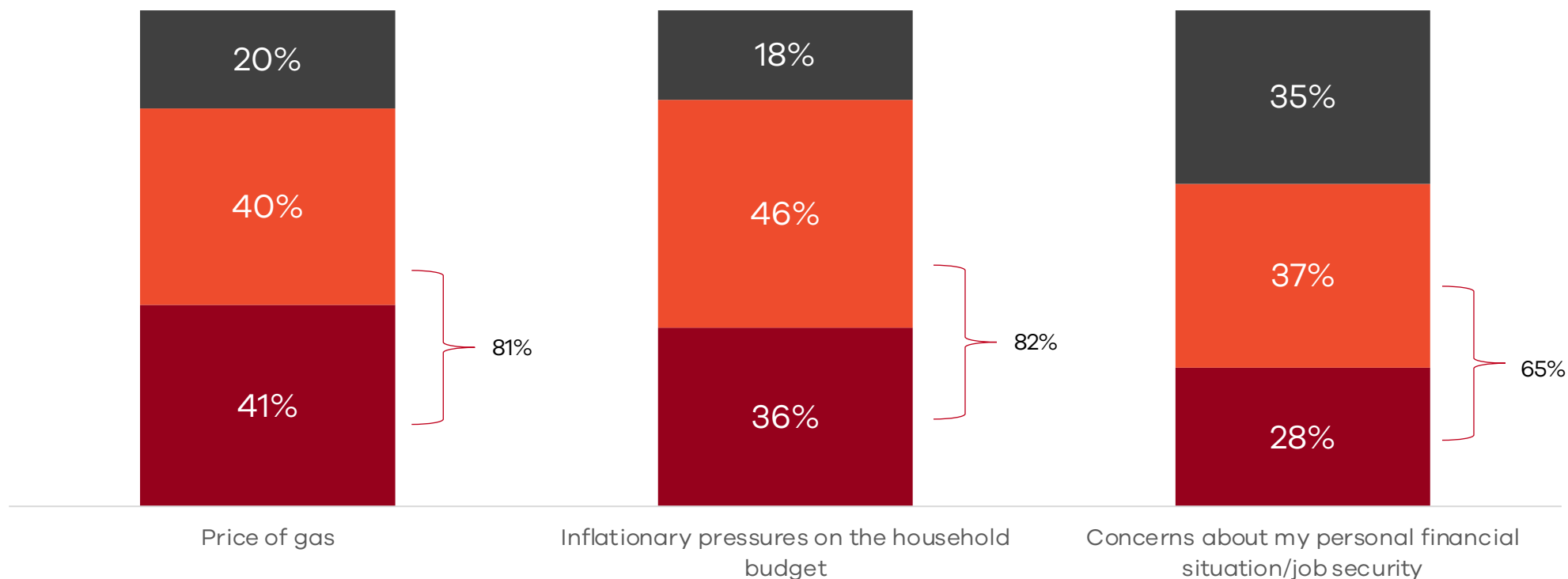
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

# Financial Factors Are Having an Impact on the Travel Plans of Active Leisure Travelers.

/ The price of gas and inflationary pressures on the household budget have at least some impact on the travel plans of 8 in 10 active leisure travelers, while two-thirds is somewhat impacted by personal financial concerns.

Financial Impacts on Leisure Travel in Next 6 Months

■ Extreme Impact ■ Some Impact ■ No Impact



Base: Active leisure travelers (n=3,338)

Source: MMGY Global's 2022 *Portrait of American Travelers* "Winter Edition"





# Rising Gas Prices Are More Likely to Impact How People Travel and Spend Than If They Travel

**Base:** Active leisure travelers who say gas prices will impact travel (n=2,830)  
**Source:** MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

## Travel Behavior Due to Gas Prices (Among those who indicate gas prices will have an impact)

