

2023 Leisure Travel Trends Study

How the Economy and Changing Habits
Will Shape the *Future of Travel*



TRAVELBOOM

TravelBoomMarketing.com

Introduction



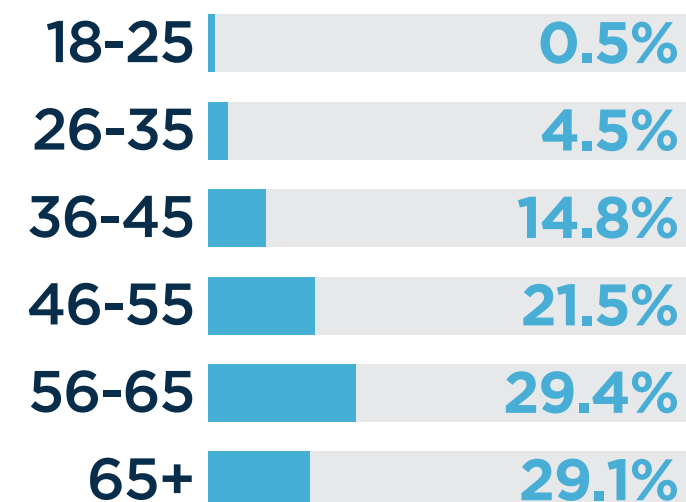
The 2023 Leisure Traveler Sentiment Study is now available, with **valuable insights** into the mind of today's vacationer and how hoteliers can attract them to their destinations and properties.

KEY INSIGHTS OF THE 2023 REPORT REVEAL:

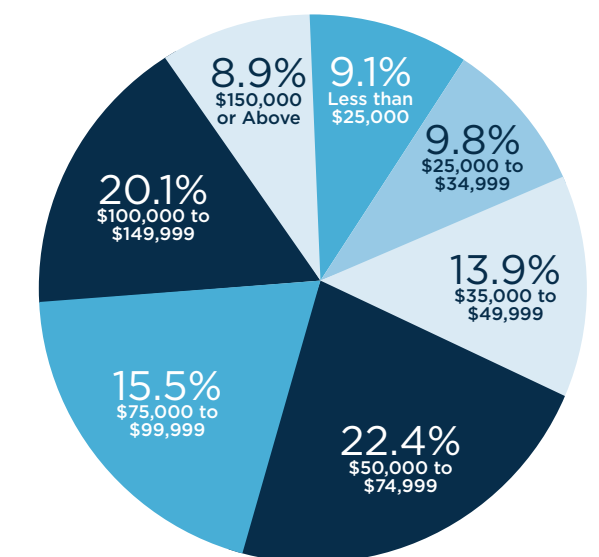
- Leisure travelers are changing their habits in light of the overall economy.
- Travel is returning to pre-Covid numbers.
- Reviews can easily disqualify a property, but reviews alone can't entice a visitor to stay.
- Canadians are back on the road, with only 18% citing Covid as a major factor in limiting travel.
- Loyalty programs are surging in popularity for leisure travelers.
- Hoteliers must change their social media strategies to win over travelers.

WHO MADE THE TRAVEL PLANS?

AGE:



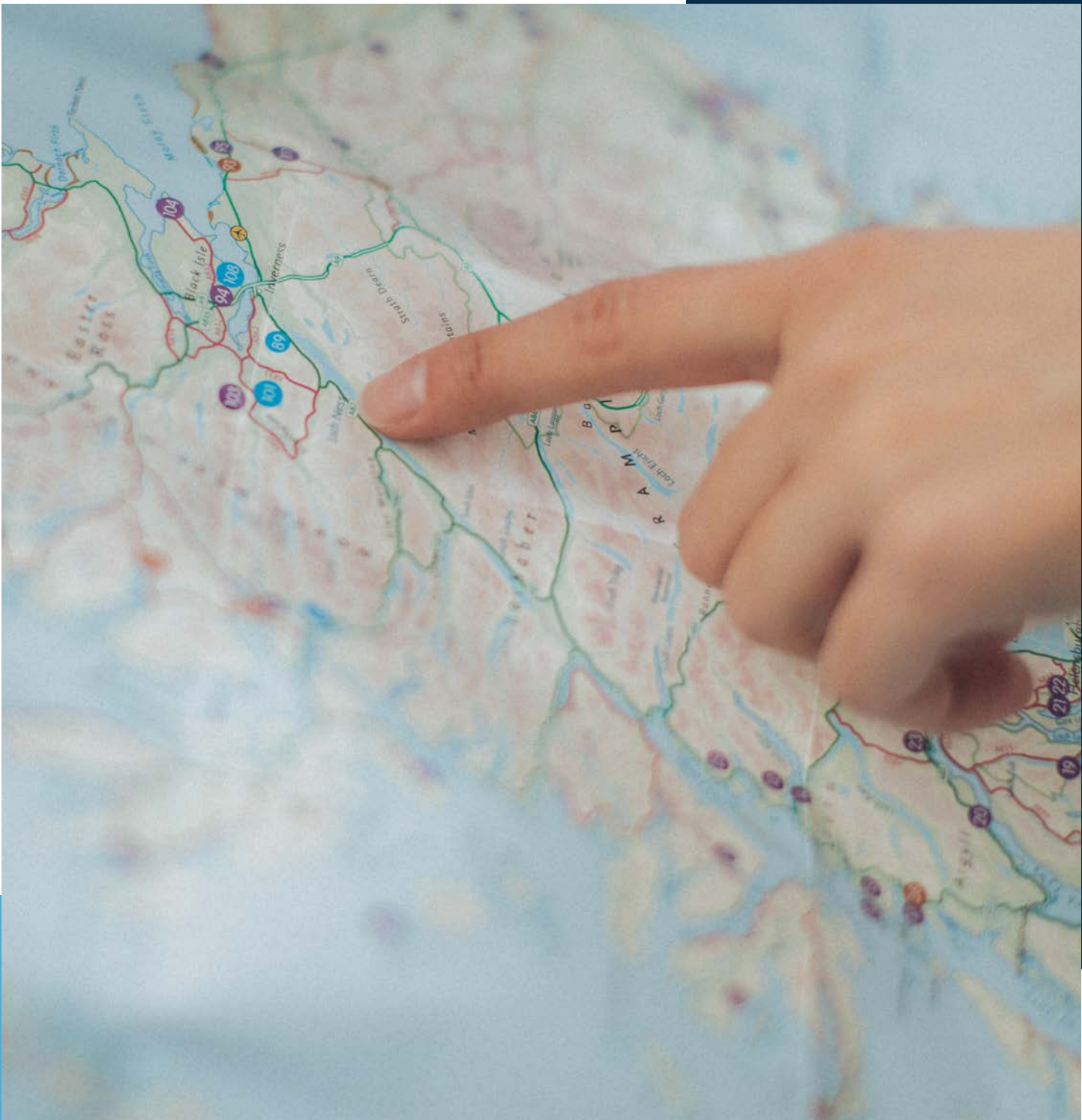
HOUSEHOLD INCOME:



We welcome feedback and inquiries related to this study. For more information or to get in contact with us, please visit **TravelBoomMarketing.com**.

Travel Planning

2023’s largest shift from 2022 comes from our famous first-word question: “What is the **first word** you think of when considering travel right now?”



Covid has been at the forefront of considerations for respondents since the beginning of the pandemic.

In 2023, a new “C” word appeared: **cost**. Only 6 out of approximately 1,800 respondents indicated that Covid was the first thing to come to mind – and words like **fun**, **relaxing**, **sunshine**, and **beach** have taken center stage.



FLASHBACK TO 2020

We asked this same question back in April 2020. The first word was very different: **safety**. Honorable mention: **nope**.



TravelBoom Take:

The data is clear: the fear of Covid has passed and we are largely accepting it as a part of daily life. An **Ipsos study** in late 2022 found that a majority of Americans were no longer concerned with Covid heading into the 2022 holiday season, and more and more research points to the same trend.

2023 TRAVEL ON THE RISE

The traveler has
evolved since 2022.



The traveler has evolved since 2022. This year's travelers are venturing out to see new places – **2023's report found a 7.2% increase in travelers who have gone on at least 1 vacation lasting 5 days or longer.**

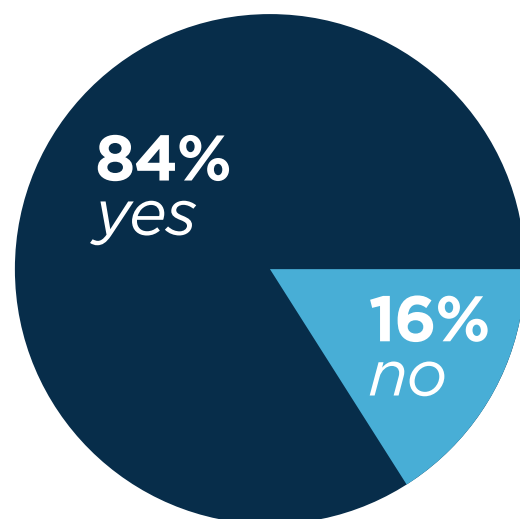
Trips are also more frequent, with a notable increase in travelers who have taken 2 or more trips in the past 12 months. One-trip wonders are losing steam – respondents who have only taken 1 vacation in the last 12 months dropped nearly 10%. Growth occurred on the other side of the spectrum as well, with an increase in high-frequency travelers who have taken 5 or more vacations in the last 12 months.

In the past three years, have you traveled for
at least one vacation lasting 5 days or longer?

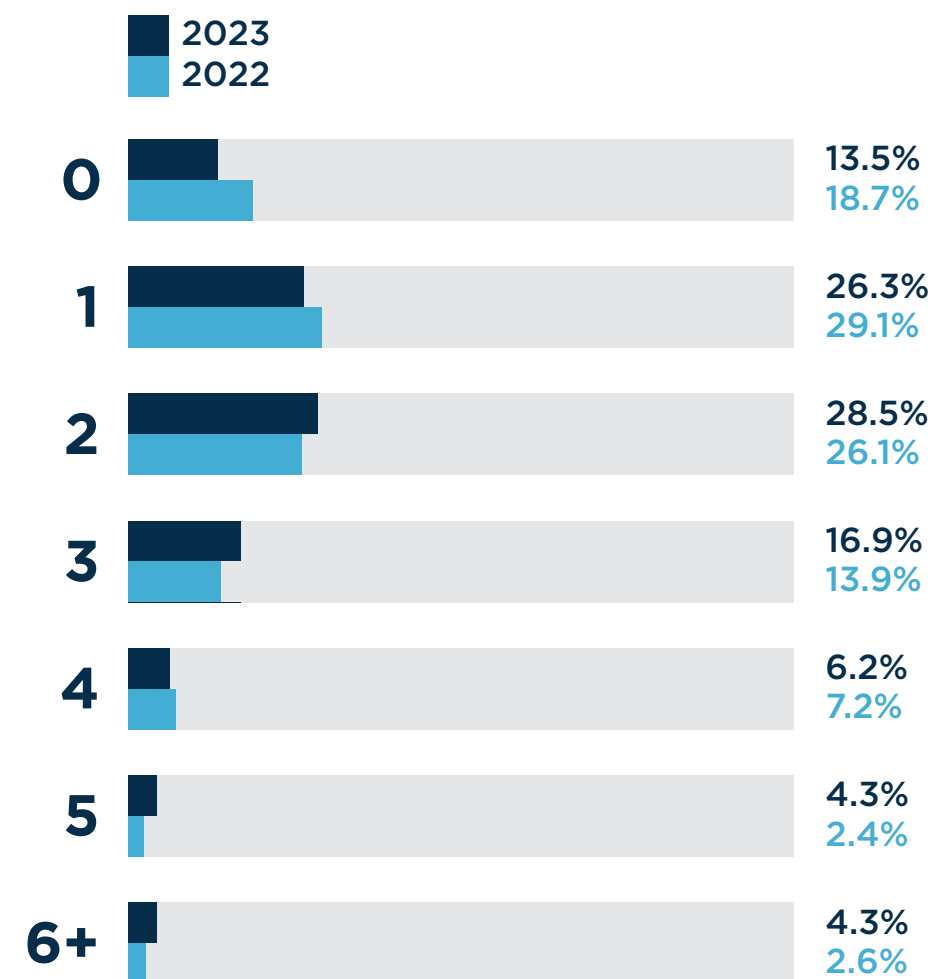


KEEP IN MIND:

- The respondents defined “vacation” themselves. A specific length of time for the trip was not specified.
- 2023 data is widely considered to be “post-Covid,” while 2022 data included a portion of respondents who were still reluctant to travel due to safety concerns. Covid-specific data can be found further in the **report**.



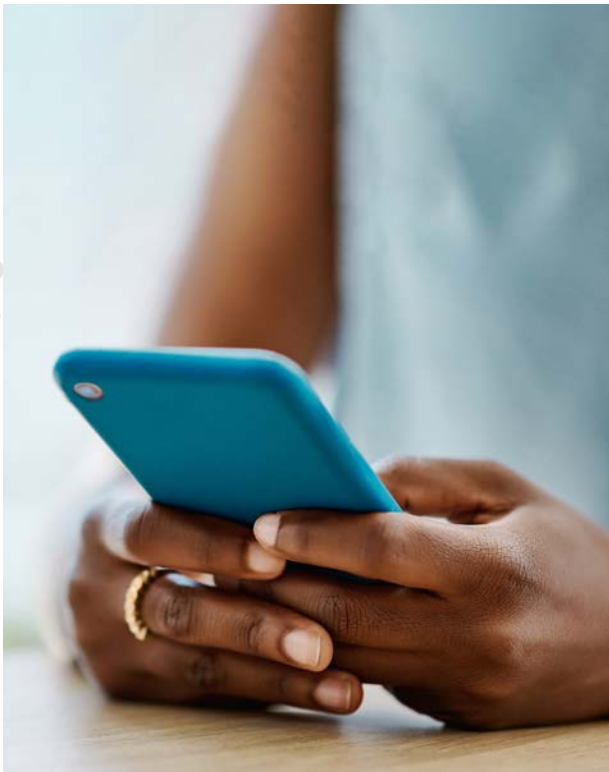
How many vacations have you taken in the past 12 months?



TravelBoom Take:

An increase in travelers taking multiple vacations in a year is a great sign for hoteliers. Confidence is high and travelers are ready to see the world around them. What opportunities exist to bring a guest back to your property? Don't make the mistake of assuming that a visitor who stayed with you recently isn't planning a return trip.

What *triggers* the travel-planning cycle?



We asked: What inspired you to start planning your most recent vacation?

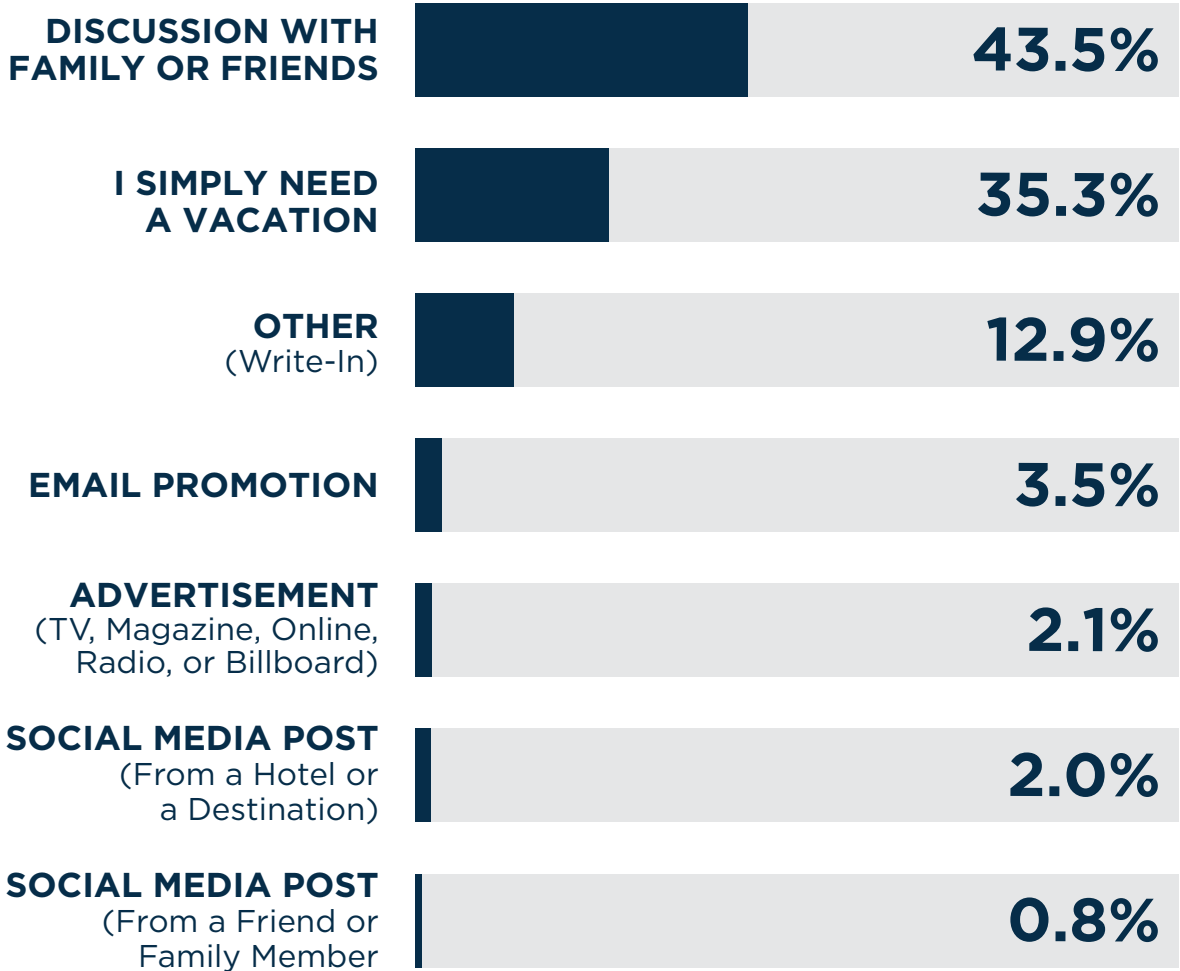
Results have been nearly identical since our first sentiment study, with 43.5% of respondents noting that **discussions with family or friends** were the top trigger to start planning, followed by *I simply needed a vacation* at 35.3%.

The remainder of responses were small: **email promotions** at 3.5%, **social media posts by a property or destination** at 2%, and **social media posts by a friend or family member** at just 0.8%.

Based on nearly identical responses before, during, and after the pandemic, this question will be retired in 2024.

The social media statistics may be shocking, especially in a society that spends so much time online, but a vacation ad on someone’s feed isn’t going to inspire them to take a vacation if they weren’t already planning one – and this data has been consistent for years. This doesn’t mean a strong social media strategy isn’t necessary – you just need a smarter plan than a basic social media campaign, like re-targeting past guests to keep your property in the front of their minds when they enter the travel planning cycle.

What inspired you to start planning your most recent vacation?



TravelBoom Take:

You don’t know when your guests will talk travel with their friends, or when they’ll need a vacation. You need to employ intelligent marketing strategies to put your property front and center, waiting for them when they start their planning process.

Locking in the Dream Vacation

The planning cycle is moving *faster than ever* before once today's potential guest decides to vacation.

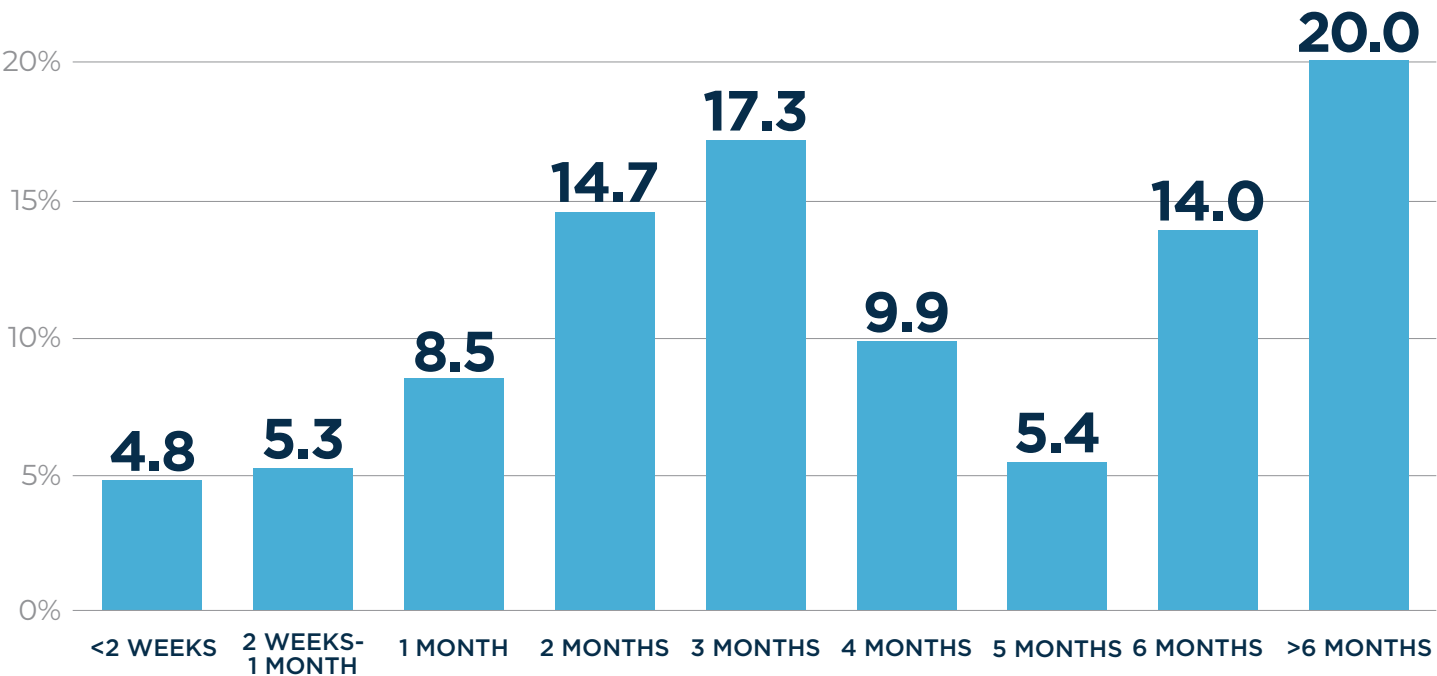


The average vacationer is going to chat with travel companions, browse amenities, and make their choice after visiting *just under 5* unique websites.

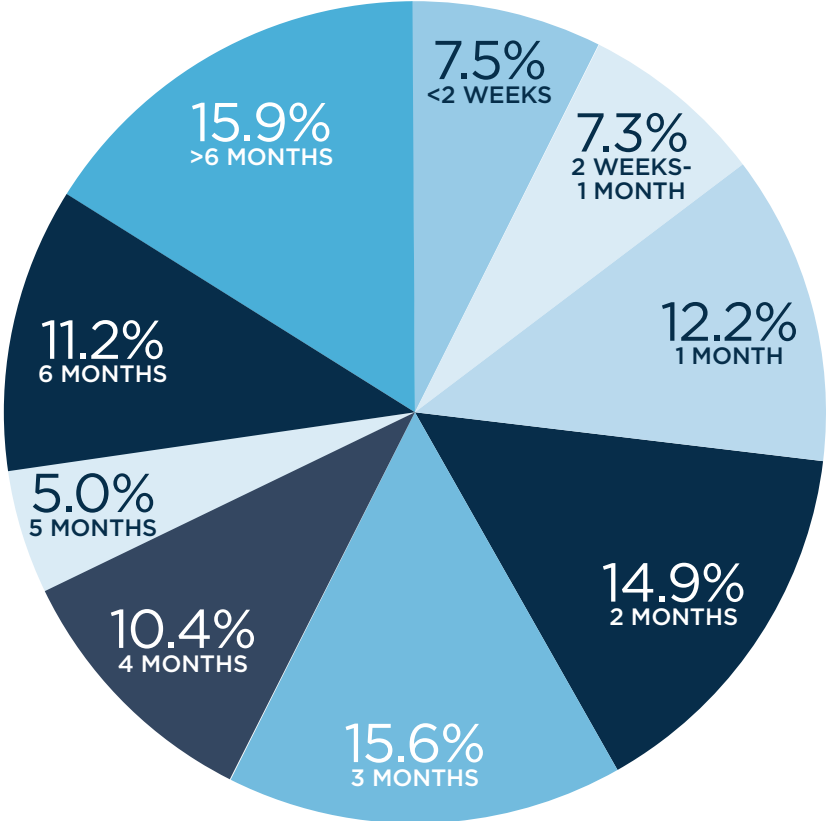
Vacationers are planning farther in advance, with 11.2% fewer respondents traveling within a month of booking and 9.6% fewer traveling within 2 months. The planning cycle for 3 months rose by 12.6%, and 6 months by 10%.

We also found that vacationers can typically be grouped into *two categories*: those who plan and travel within **3 months**, and those who plan and travel within about **6 months**.

How far in advance did you begin planning for your vacation?



How far in advance did you book your accommodations?



While the overall planning process has lengthened slightly, little has changed about when vacationers actually book their travel.

Bookings within 2 weeks of travel declined slightly, which is to be expected based on the start of the booking process.



In the 2024 edition of the Leisure Travel Study, we will ask respondents about the length of time between the decision to vacation and booking a stay.

In the meantime, current data shows that the total planning process is only a few weeks long.

What are the *top amenities* travelers expect?

Leisure travelers reported that a **pool** or other water amenities were the most important to them, followed closely by **free parking**. For the first time in our data, **in-room kitchens** overtook both **free breakfast** AND **free Wi-Fi**. It is possible that consumers have come to expect free Wi-Fi, and have accepted the loss of breakfast/food amenities due to Covid. With just 0.2% of our respondents ranking it among their top 3, electric car charging stations were the lowest priority.



TravelBoom Take:

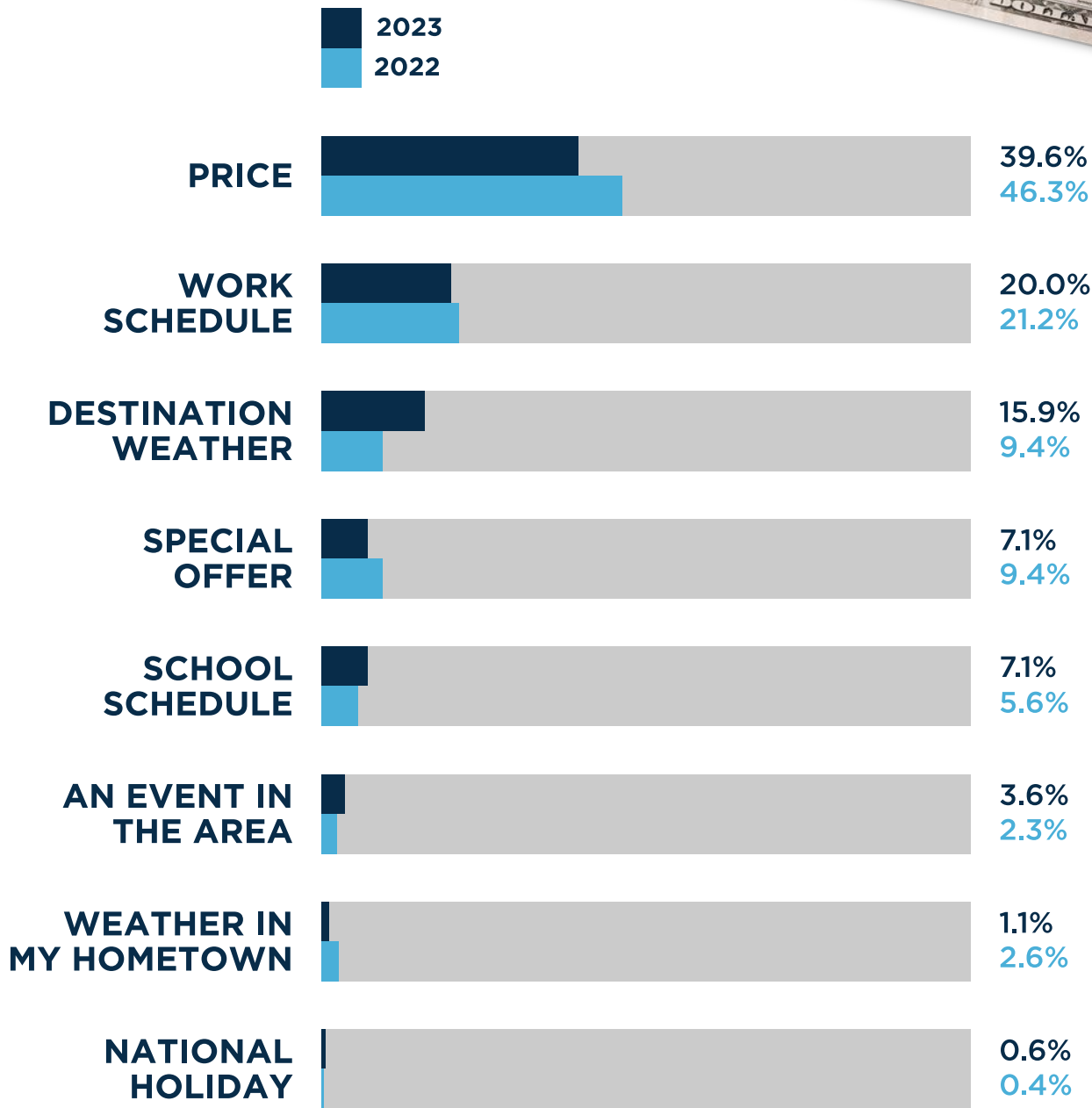
Three of the top five items that leisure travelers prioritize when planning a trip are cost-saving measures, four if you consider the in-room kitchen. Properties with these amenities should make sure to promote them clearly on their site and include them in their marketing efforts.



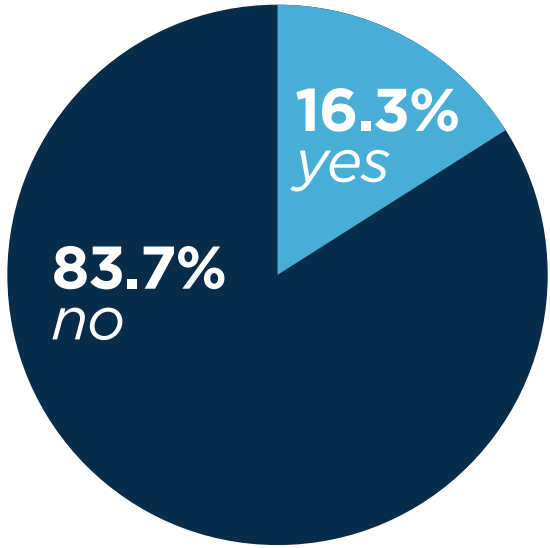
WHAT IS THE MOST IMPORTANT FACTOR THAT IMPACTS YOUR TRAVEL DATES?

A change from the traditional price-conscious traveler, factors that have grown in importance are the **destination's weather** and **working around school schedules**.

Price is now less important for leisure travelers, with a 14% decrease in the importance of price and a related 24% decrease in the importance of special offers and promotions.



Respondents who indicated that they had booked, but not yet been on, a vacation were asked whether higher travel costs had made them consider canceling their vacation.



The data is positive: only

16.3%

of respondents indicated that they **would consider canceling their vacation**

To compare,

36%

of 2022 respondents indicated that they would consider **canceling an already-booked vacation**.

In just **one year**, we have seen a

55% drop

in **traveler cancellation risk:**

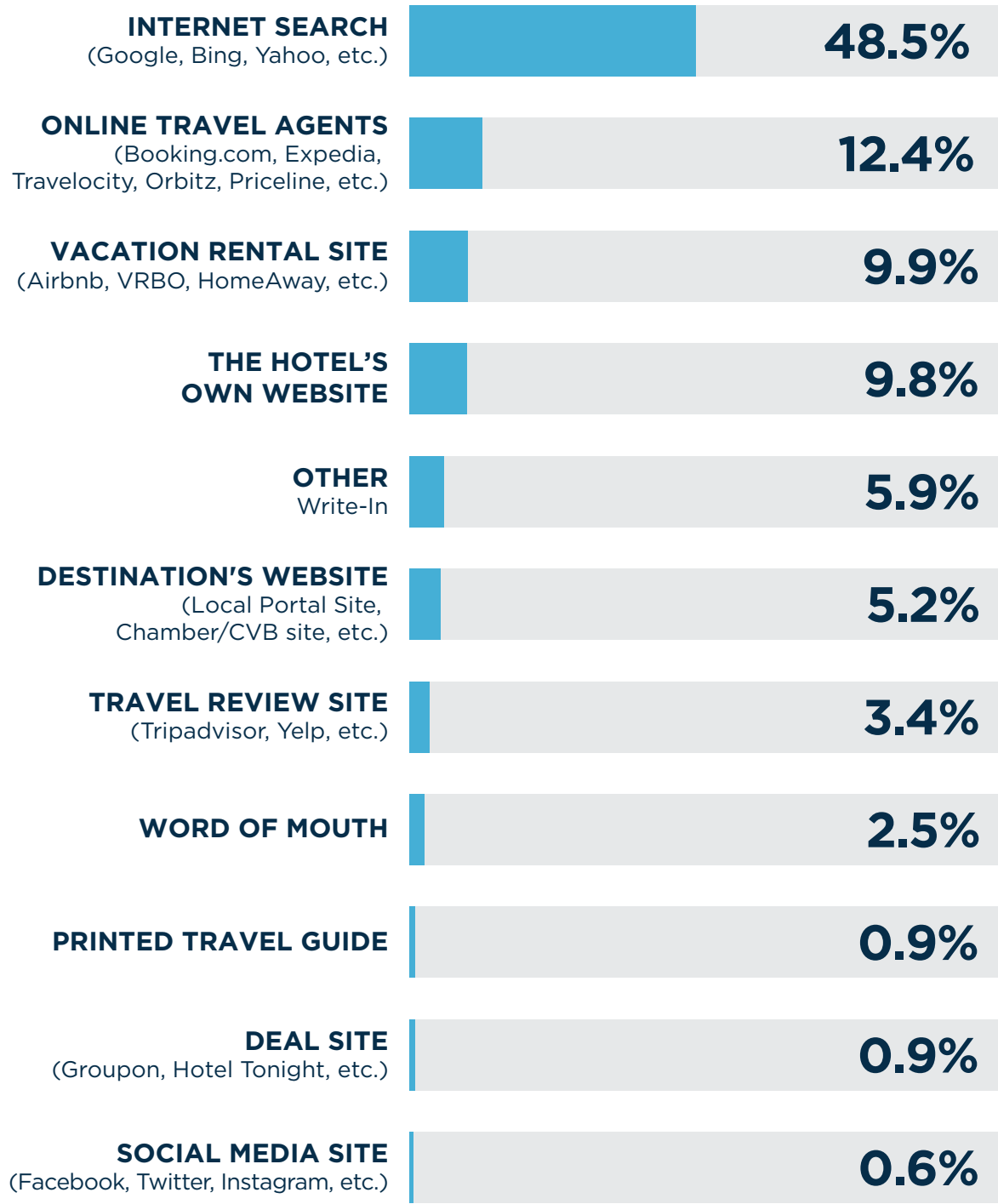
a comforting piece of news for hoteliers weary of the effects that cancellations have on their business.



Where did you look *FIRST* to begin your most recent vacation planning process?

48.5% of respondents start their travel planning process with a search engine. Online travel agencies follow with just 12.4%, and vacation rental sites next at 9.9%.

The concerning part of this data is the drop in respondents indicating that they started their planning with a hotel’s site. In 2022, 10.7% of respondents started at a hotel site – this year, that number fell to 9.8%



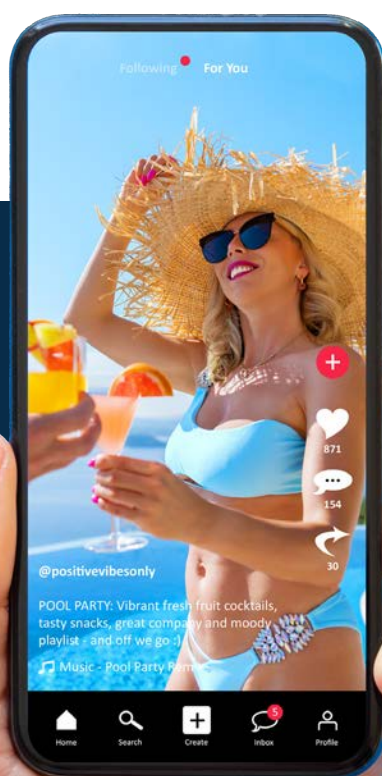
TravelBoom Take:

With nearly half of all travelers starting their planning journey with a search engine, independent hoteliers can’t afford to miss out on prime SERP (Search Engine Results Page) real estate. Owning the SERP is paramount in driving direct bookings and maximizing revenue. Through a mix of organic search optimization, paid search, and a strong metasearch campaign, **your hotel could own the SERP.**

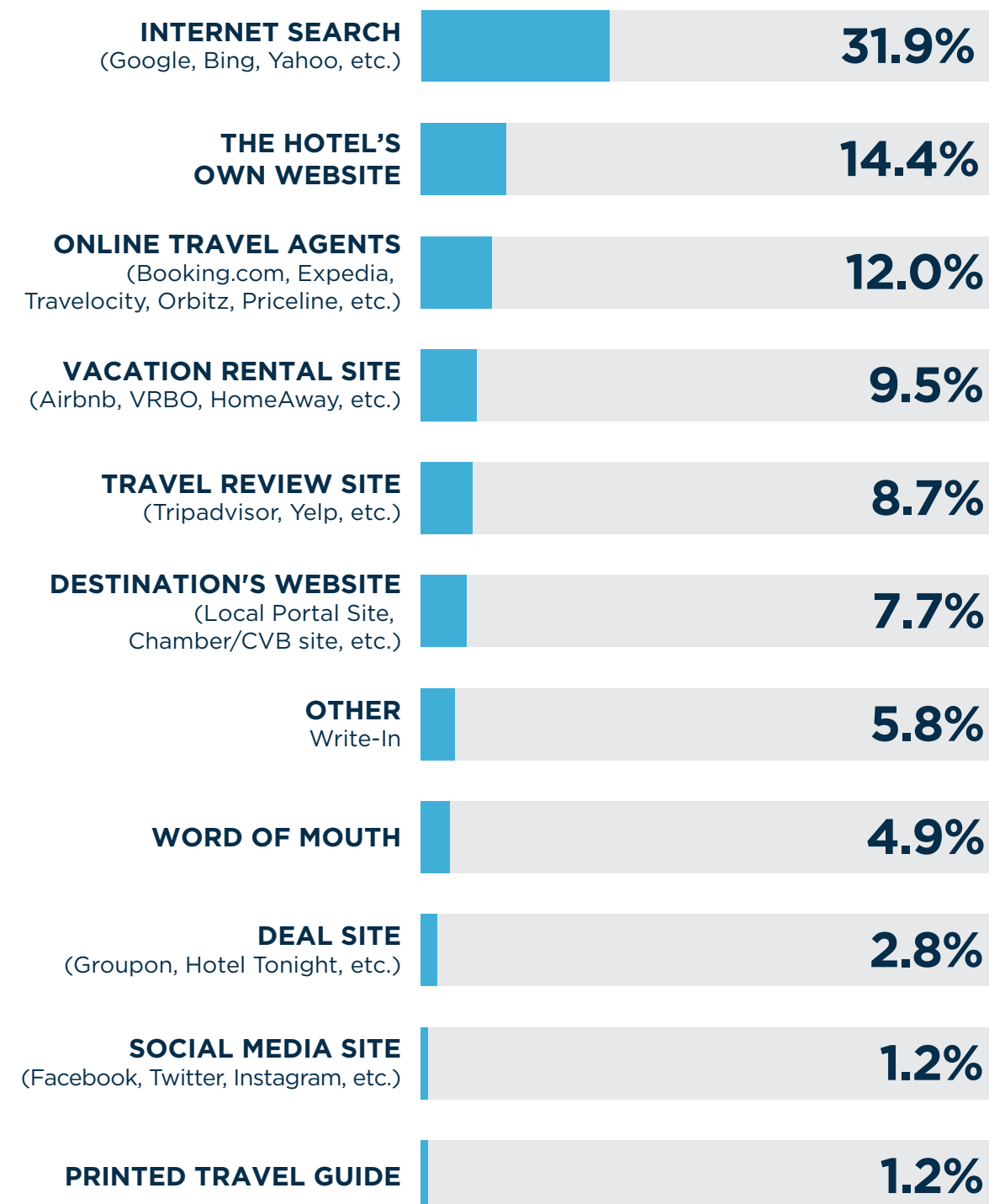
What is the *most influential source* for planning where to stay on vacation?

Now that we know where the planning journey begins, let's follow it: We asked respondents how they decide where to book their stay. Though still the top answer, **search engines** like Google, Bing, and Yahoo, received just 32% of votes.

In second place, great news for hoteliers: 14.4% of respondents said that the **hotel's own website** is where they look to book. Online travel agencies follow closely at 12%, and rental sites like VRBO and AirBnb at 9.5%.



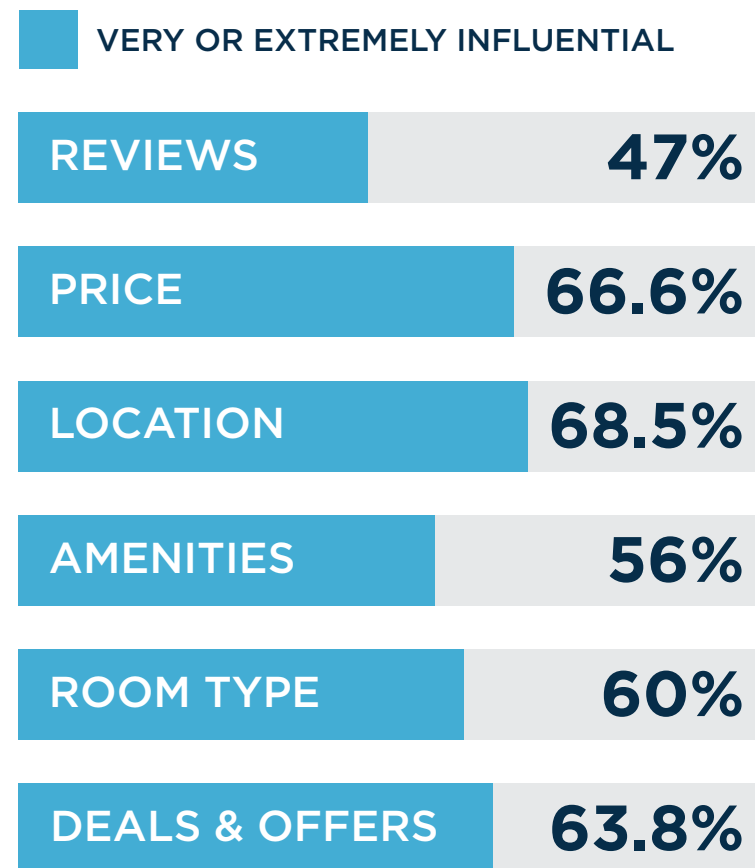
In a society that spends so much time online, it's surprising that **only 1.2% of respondents felt that social media**, like Instagram, Facebook, Twitter, and TikTok, is the most influential source that leads to a booking – but this data tracks with the previous section, when social media ranked low in importance during the start of the travel planning process.





We asked: *What influences you most in choosing accommodation?*

As expected, *location* (69%) and *price* (67%) were nearly tied as the most influential factors, followed by deals, room types, and amenities. **Reviews came in last** with 47% of respondents ranking them most influential.



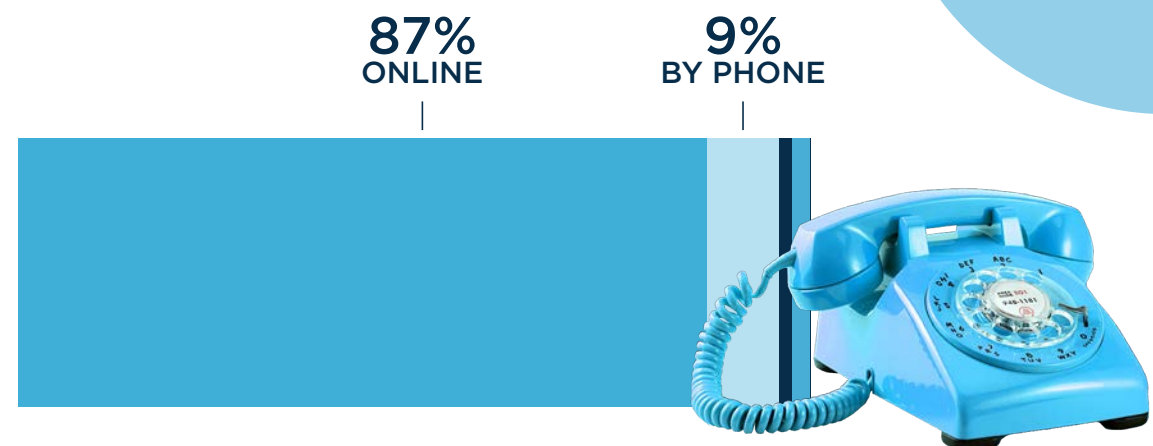
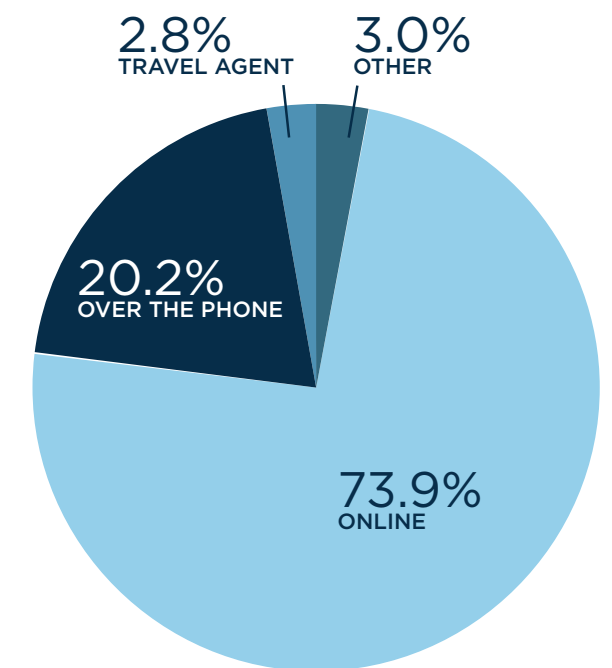
➤ TravelBoom Take:

Other questions in this study revealed that reviews are incredibly important – so why did they rank low in this context? It could be that while a negative review can tell a traveler not to choose your hotel, positive reviews don’t necessarily seal the deal in your favor. This data suggests that poor review management can drive traffic straight to your competitors, so take some time to think about how your hotel or property can maximize positive reviews and take negative reviews in stride.

HOW DID YOU BOOK YOUR VACATION?

Online bookings continue to rule the results at 74% this year – a 2.6% increase from 2022’s results, likely taking a share from respondents who booked via phone.

Travel agent and “other” bookings have not seen significant shifts in recent years.



A smaller sample size of respondents 45 and younger **opted to book online 87% of the time**, with only 9% continuing to book via phone.

In an even smaller sample of respondents 25 and younger, 100% booked online – though this sample size is too small to be statistically valid.

Respondents 45 & younger

➤ TravelBoom Take:

The data is clear: most vacationers are booking online, with just the older demographic favoring phone bookings. If your online booking experience isn’t seamless and quick, you could lose bookings to a faster competitor.

Reviews Dictate Guest Decisions

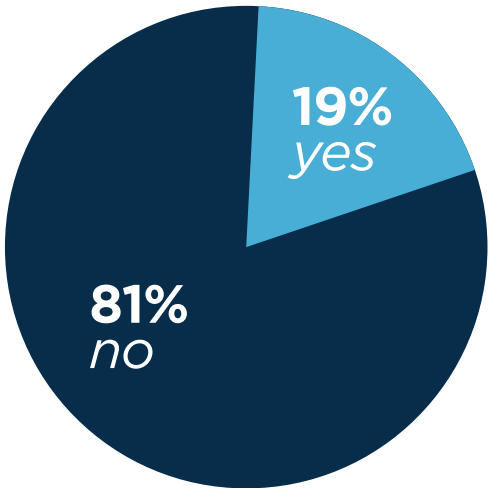
Reviews still dominate the decision-making process with many travelers holding off on booking until they've read reviews.



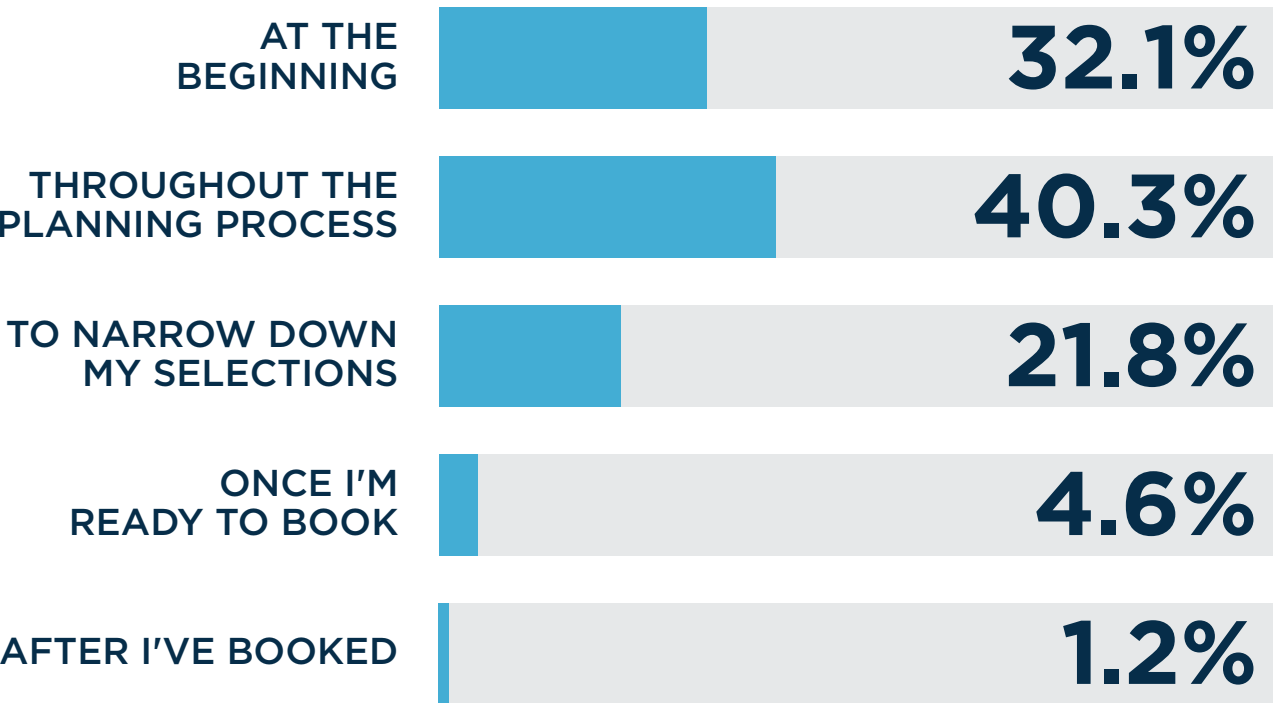
Although the number dropped from 82% to 81% of respondents who *won't book until they've read reviews for the property*, reviews still dominate the decision-making process.

More respondents utilize reviews during the entire process than ever before, with a 2% increase from 38.5% to 40% in just a year.

In the future, will you book a stay *without* first reading online reviews? →



At *what stage* of your research do you read hotel reviews? ↓



AT THE BEGINNING 32.1%

THROUGHOUT THE PLANNING PROCESS 40.3%

TO NARROW DOWN MY SELECTIONS 21.8%

ONCE I'M READY TO BOOK 4.6%

AFTER I'VE BOOKED 1.2%

NOT ALL REVIEW PLATFORMS CAN BE TRUSTED.



WE ASKED: How believable are these review platforms?

The majority of respondents ranked all platforms, like TripAdvisor, Google, Yelp, hotel websites reviews, online travel agencies, printed travel guides, and destination websites as *generally believable*.

We looked to each end of the spectrum and determined which platforms were deemed **not** believable and **extremely** believable.

Least Believable Review Platforms:

Yelp comes in first by coming in last: 19.1% of respondents **don't trust reviews from Yelp**, and only 2.7% consider Yelp reviews extremely believable.

Social media platforms were considered **not believable by 16% of respondents**, and 2.9% considered social media platforms **extremely believable**.

Respondents were also wary of printed travel guides, coming in with **11.7% not believing the reviews** and only 3.1% deeming them extremely believable.

Most Believable Review Platforms:

TripAdvisor was at the forefront of believability with 6.1% of respondents ranking the platform extremely believable.

A close second for a hotel's own website, with 5.9% ranking the reviews extremely believable.

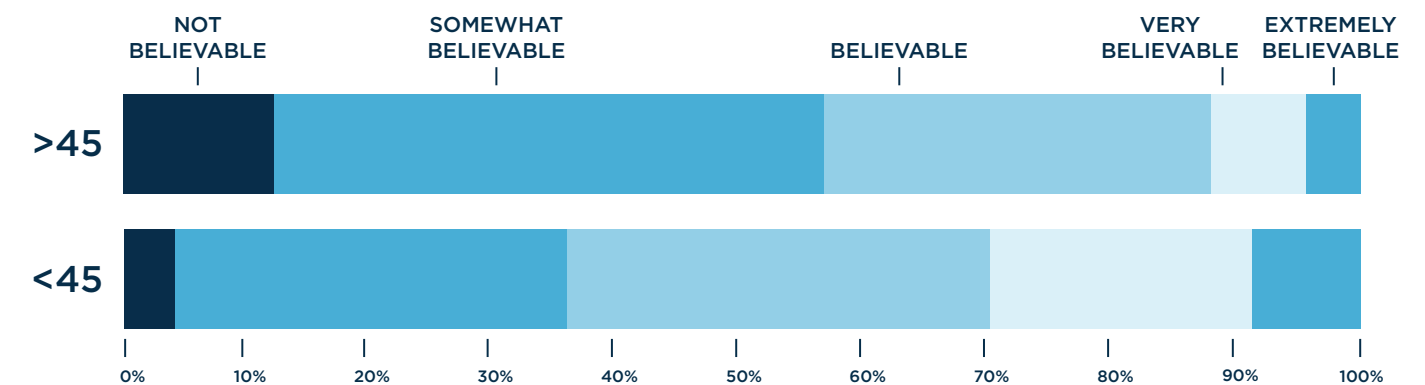
Google's review platform held up third, with 5.8% of respondents marking it extremely believable.

Are *younger travelers more trusting* of reviews?

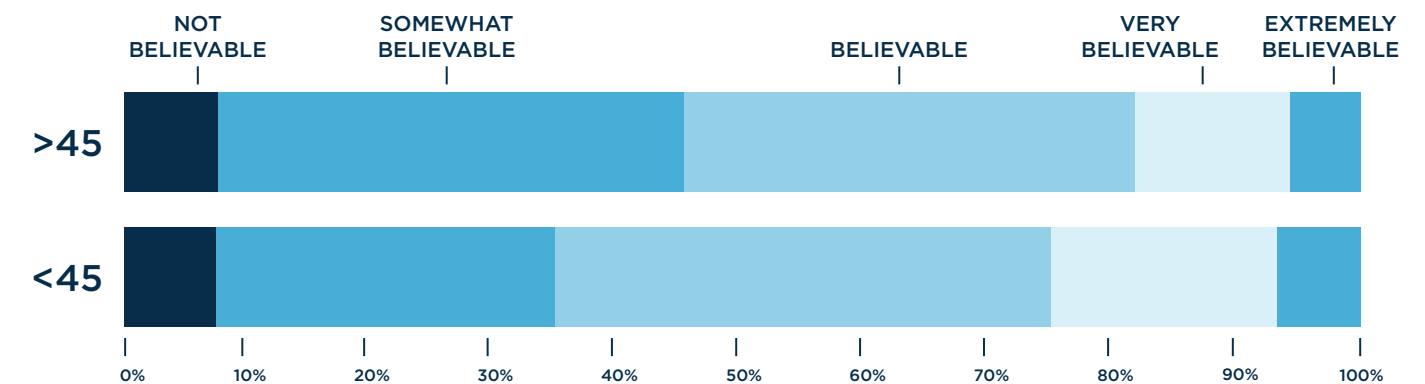
A review's believability seems to be heavily impacted by the respondent's age.

Looking at TripAdvisor and Google's believability results split up by age yields surprising results: travelers who are **under 45**, grew up with the internet, and likely have younger children are more likely to trust reviews when making a travel decision.

GOOGLE REVIEW BELIEVABILITY



TRIPADVISOR REVIEW BELIEVABILITY

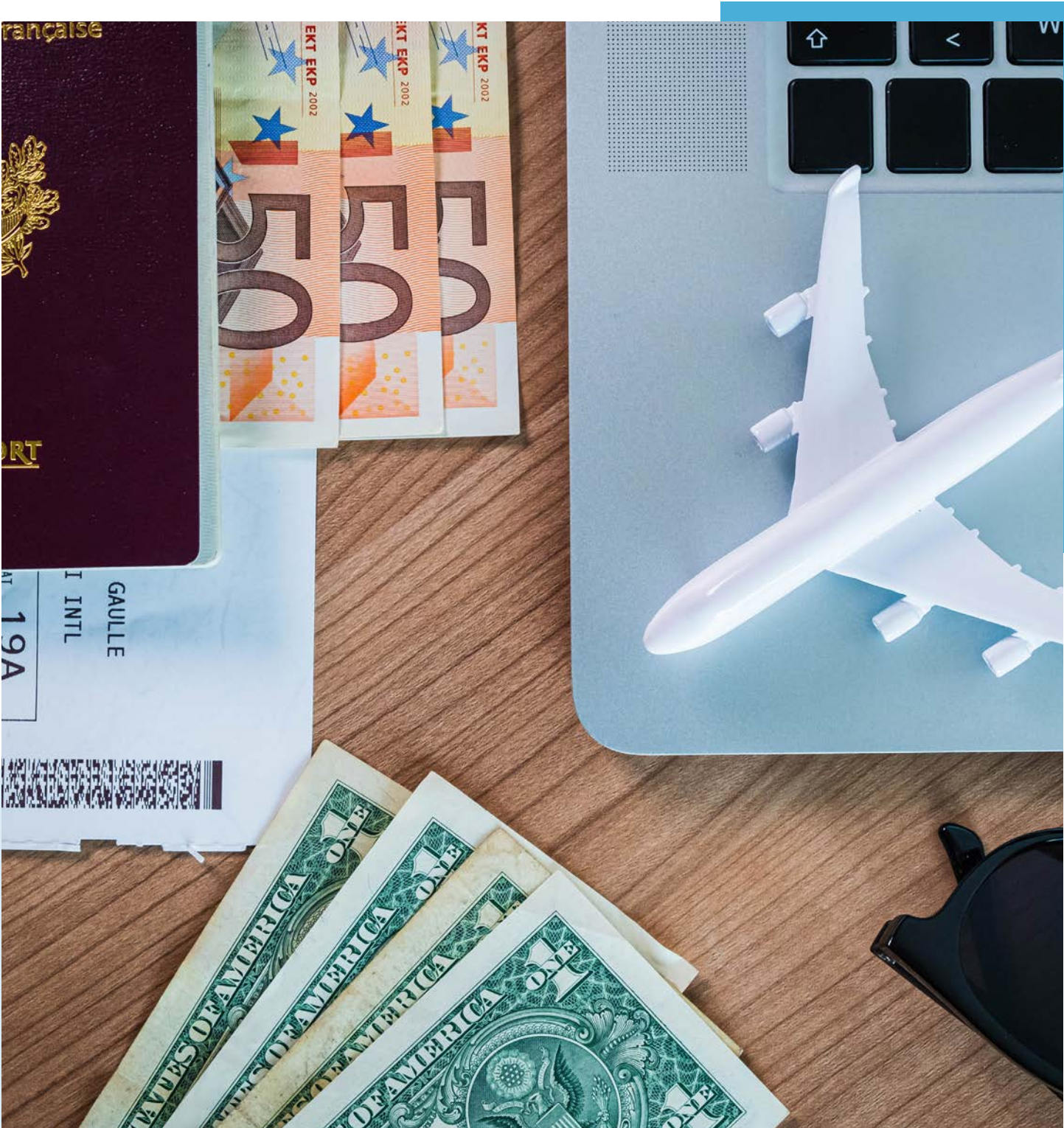


TravelBoom Take:

Today's traveler doesn't book before visiting your property's reviews, so the way you handle them is critical. You should have a proactive approach to reviews, collecting feedback from guests wherever possible, and actively engage with reviews that warrant a response to show your guests that you take their feedback seriously.

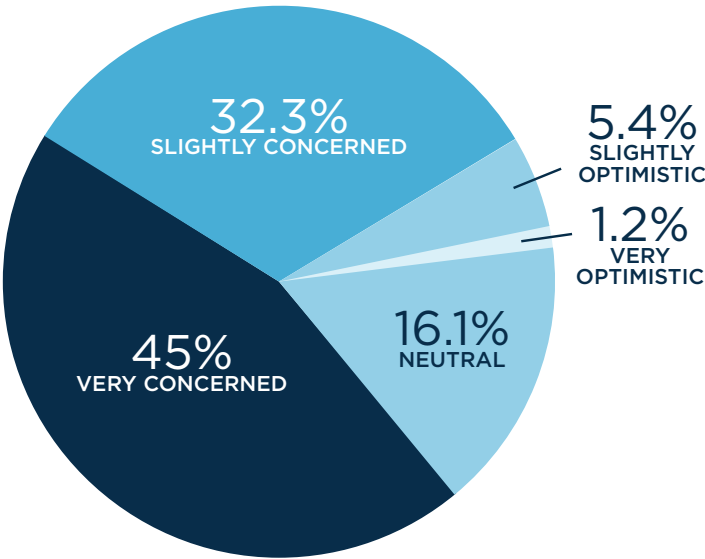
Economic Changes Impacting Leisure Travelers

We review overall economy *versus* personal economy.



The 2023 Leisure Traveler Study featured a series of new questions designed to discover how respondents see the economy, including inflation. Results showed that **there is a huge difference** between how respondents view the *overall economy* versus their **personal economy**.

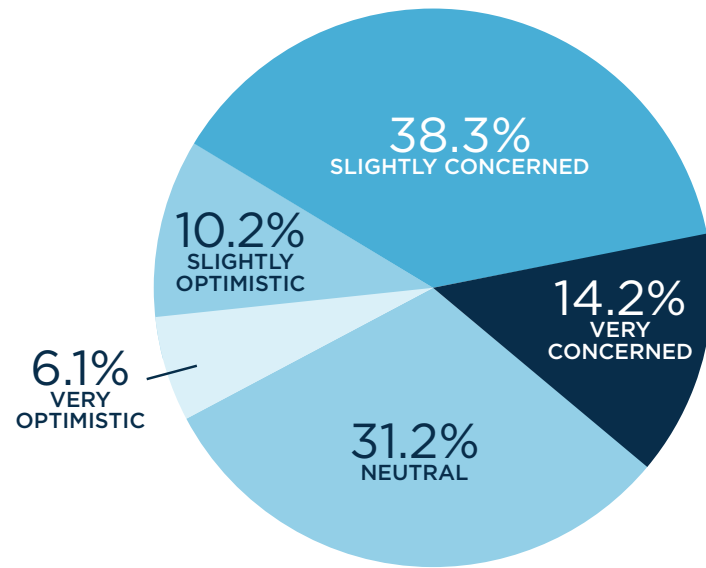
What is your impression of the economic outlook in your **country**? →



45% of respondents were very concerned about the economic outlook of the United States, with an additional 32% of respondents identifying as slightly concerned. Only the remaining 22.7% of respondents felt neutral or positive about where the economy is headed - an alarming figure for hoteliers and marketers alike.



When asked the same question about their personal economies rather than the overall economy, respondents gave a more hopeful set of answers. See those results in the figure on the following page.

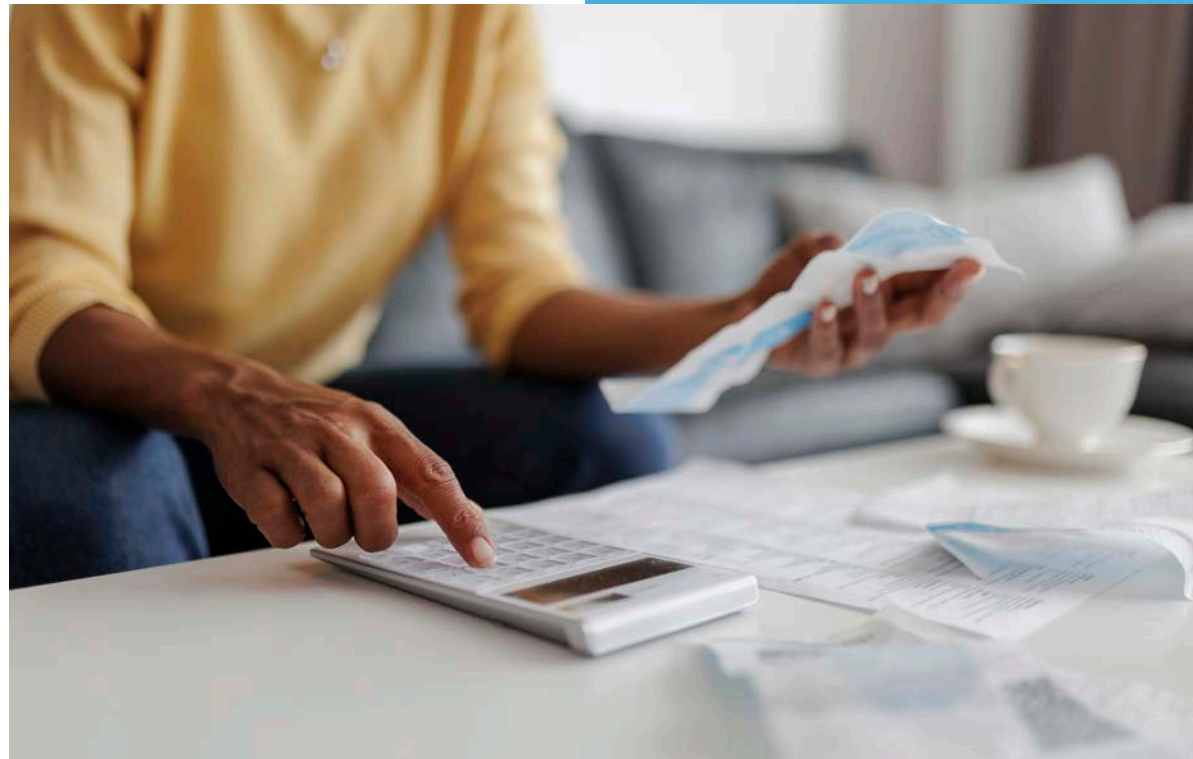


What is your impression of your **personal** economic situation?

Harry S. Truman famously said, “It’s a recession when your neighbor loses his job; it’s a depression when you lose yours.”

This sentiment is reflected in this outlook question about how respondents saw their personal economic situations. Only 14.2% of leisure travelers were **very concerned** about **their situation**, compared to 45% of respondents very concerned about the **overall** economy.

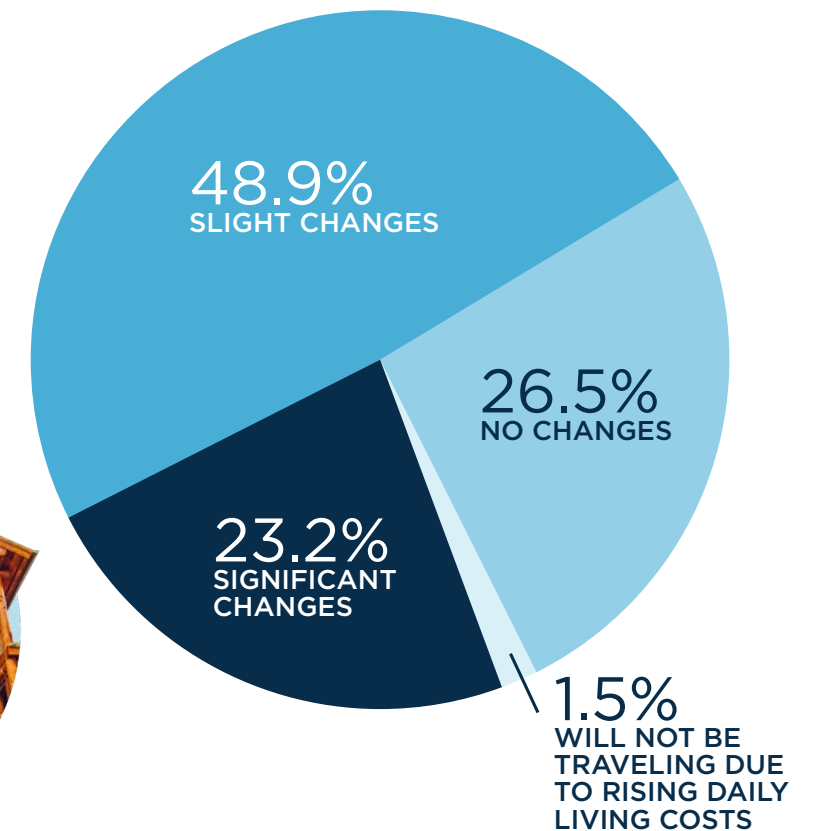
In another deviation from the previous section, *almost half (47.5%) of respondents hold a neutral or positive outlook on their personal economies.*



Has the *rising cost of living (inflation)* changed your travel expectations and planning?

Today’s hotel market is about more than having a bigger pool or closer access to attractions – it’s about proving the value of a stay at YOUR property against the rise of daily living expenses. Results show a staggering **3 out of 4 travelers making changes** to their vacation planning due to inflation.

How are **non-travel expenses**, like food + housing, impacting travel decisions?



Hotels will need to adjust their marketing strategies in order to keep driving conversions.



How influential are the following factors in a leisure booking decision?

Respondents provided a roadmap for turning browsers into bookers by sharing exactly what would motivate them in the decision making process.



PRICE DROP GUARANTEE

85.2% of leisure travelers **could be persuaded** to make a booking if a price drop guarantee was offered, making this the most popular promotion choice.



FREE CANCELLATION, ANY TIME

81.7% of respondents **would be influenced** by a free cancellation policy. Only 16.3% indicated that they would cancel an existing reservation.



25% OFF DISCOUNT

A 25% off sale (exactly the same as Stay 3, Get 1 Free) was slightly more enticing to travelers. 71% of respondents said this **would be influential**.



STAY 3, GET 1 FREE

70.1% of respondents said a promo like this **would be influential** in their process – travelers love a free night's stay.



DINING AND AMENITY CREDIT

67% of respondents **could be persuaded** to book a stay if credits for the resort's amenities, like dining, were included.



LOW, NON-REFUNDABLE RATE

With 47.4% of respondents indicating it **would not** be influential in their booking, this promotion offer wasn't a study favorite.



FLEXIBLE PAYMENT PLANS

62% of respondents indicated this would **not be influential** in their process – but this means you can influence 38% of travelers with a flexible payment plan.

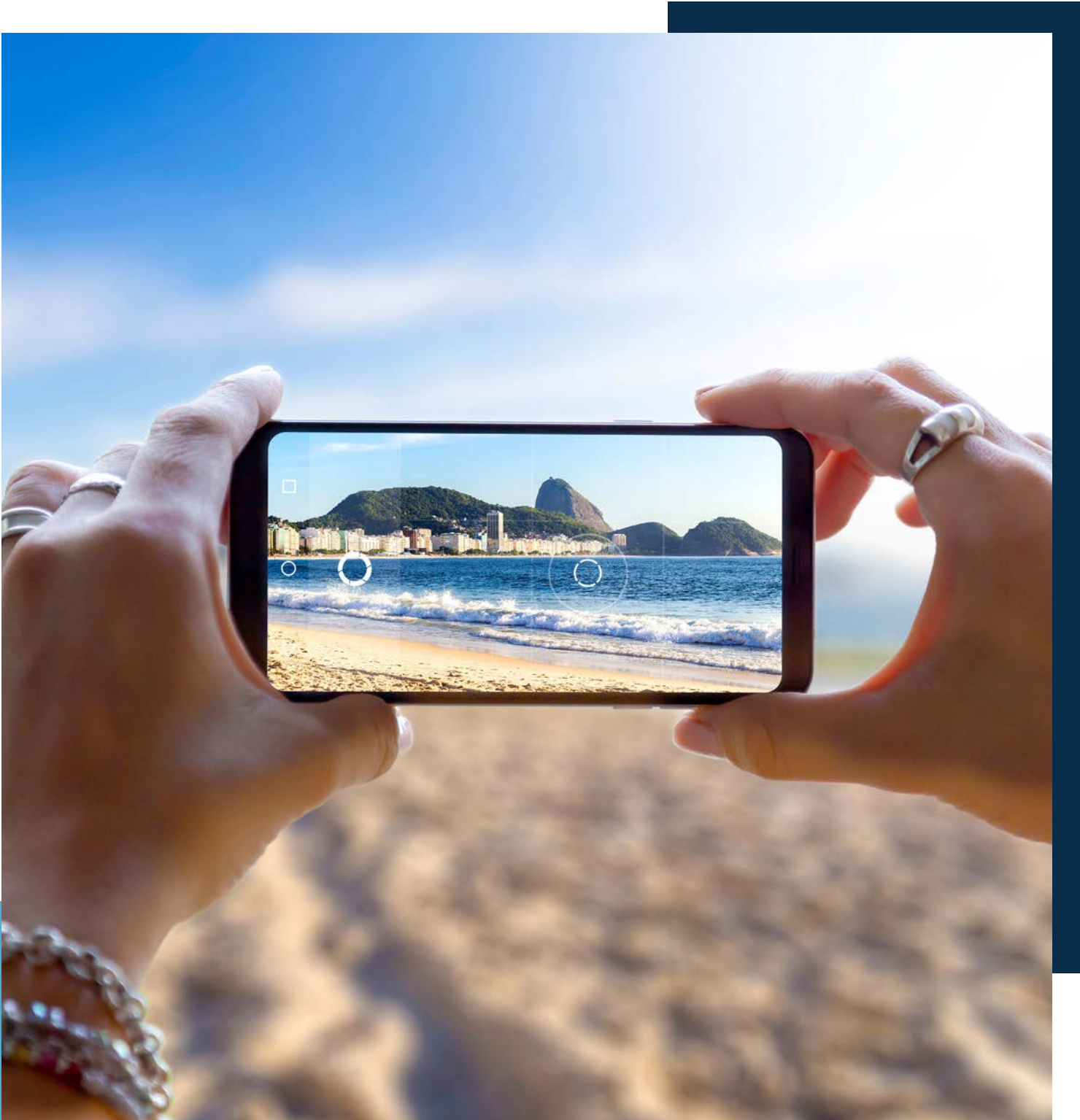


SPLIT THE COST BETWEEN GUESTS

Ranking lowest of all promotions provided, only 15.2% of travelers consider this strategy to be either **very** or **extremely influential**.

Social Media's Influence on Leisure Travelers

WE ASKED: How does social media influence your travel decisions?

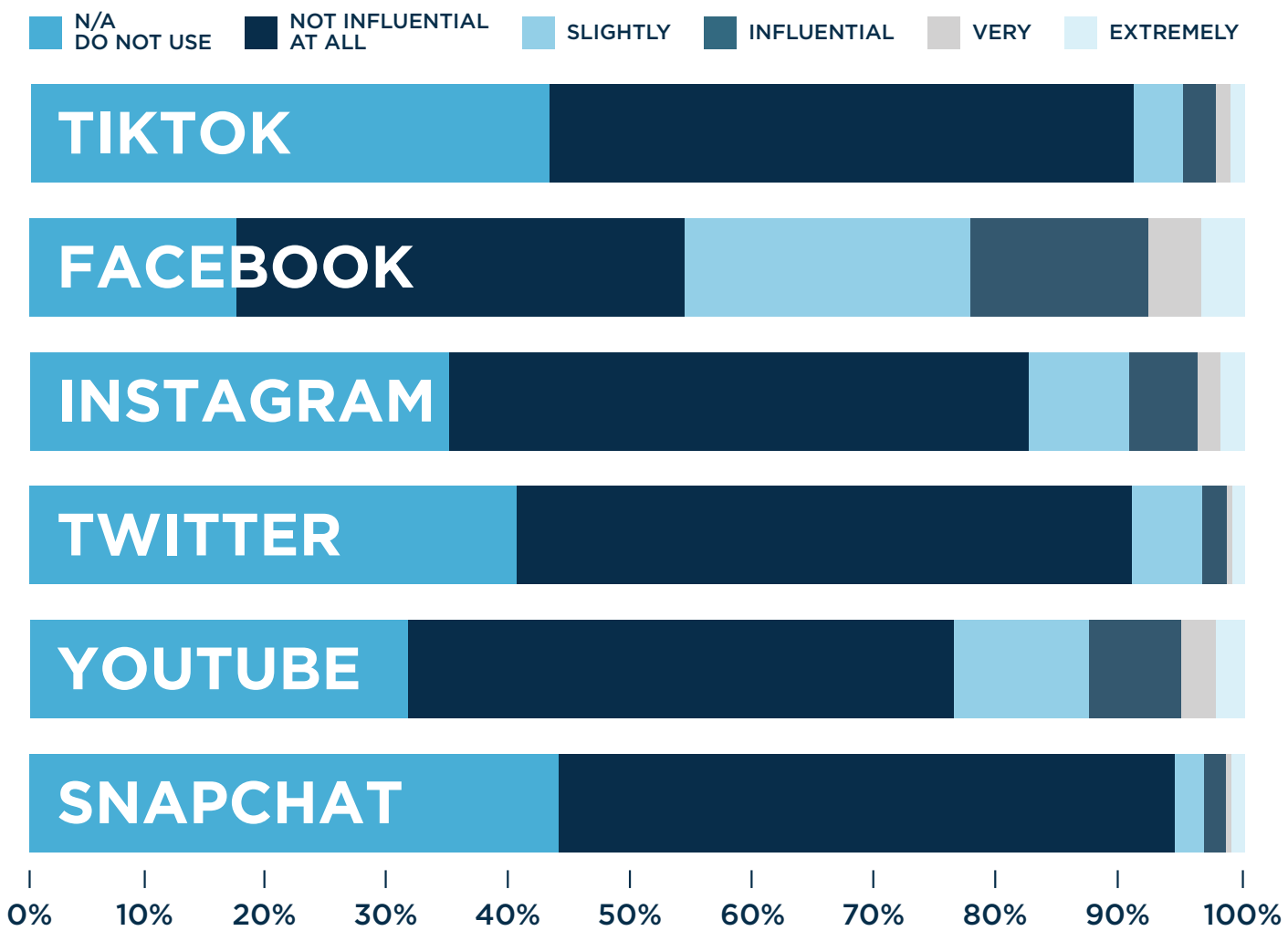


Surprisingly, *nearly all social channels were ineffective* in influencing travel.

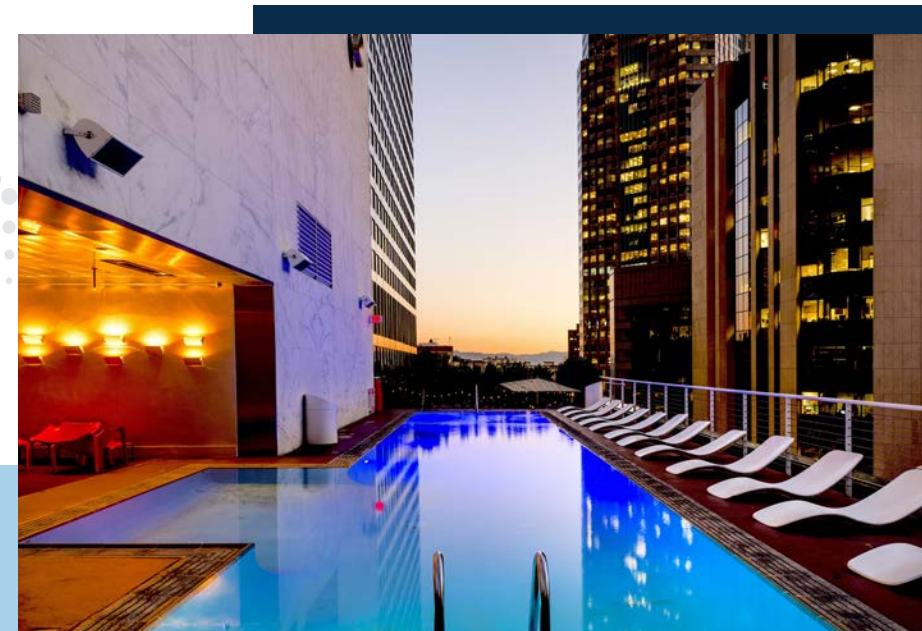
We found a small outlier with Facebook, where *only 46% of respondents indicated the platform had any influence at all* over their travel choices.

Of the respondents who indicated that they used Facebook to plan travel, **only 8%** classified the platform as very or extremely influential.

How does travel content on the following platforms influence your travel decisions?



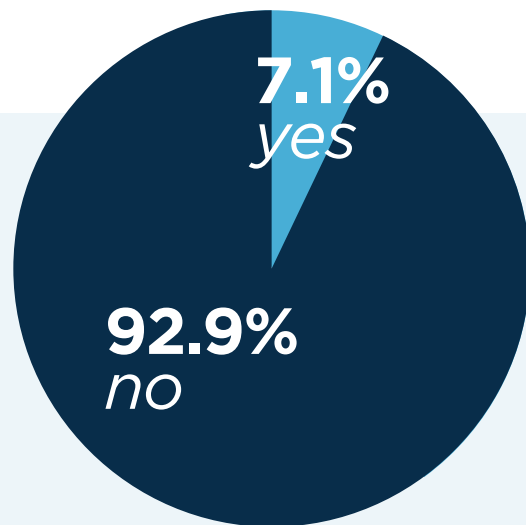
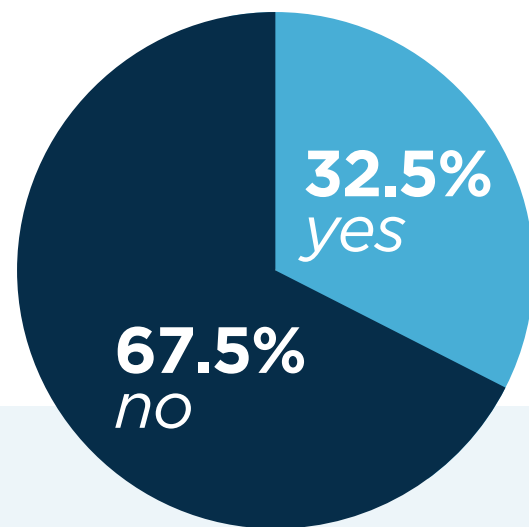
HOW SHOULD HOTELS USE SOCIAL MEDIA?



As our study found, your hotel's advertisement online isn't necessarily going to make someone book a vacation if they weren't already planning to – so how should hotels use social media? We generally find that paid Facebook campaigns are helpful for generating demand, while re-targeting campaigns are effective revenue drivers to bring guests back to your hotel for another stay.

For your hotel's organic social media strategy, quality and engagement are key. Post consistently, engage with your followers, and make sure your content is bringing some value to the table for your audience.

Prior to booking your lodging, did you visit the hotel's **Facebook** page?



← Prior to booking your lodging, did you visit the hotel's **Instagram** page?

A NEW STRATEGY TO SOCIAL SUCCESS

A recent study by [Statista](#) found that the number of **daily active users on Facebook reached 2 billion in 2022** – a huge audience for hoteliers to target based on location, age, and interests, just to name a few – with Facebook ad campaigns.

Your posting schedule, the value and quality of your content, and how your audience engages with your posts will heavily influence your social media strategy's success. **Keep your posting schedule consistent**, and share visually appealing, mobile-friendly content that brings value to your audience.

Speaking of your audience, give user-generated content a seat at the table in your organic social media strategy: share content you're tagged in, and seek out high-quality content to share. **Don't underestimate the power of giveaways and contests** – people love to win, and the entries are a great way to open the door for engagement.



Social will not influence travel, but it will absolutely influence the impression of an individual property. Your social presence must be active and engaging.



Loyalty Programs Can Drive Travel Decisions

Two thirds of all respondents are influenced by loyalty programs.

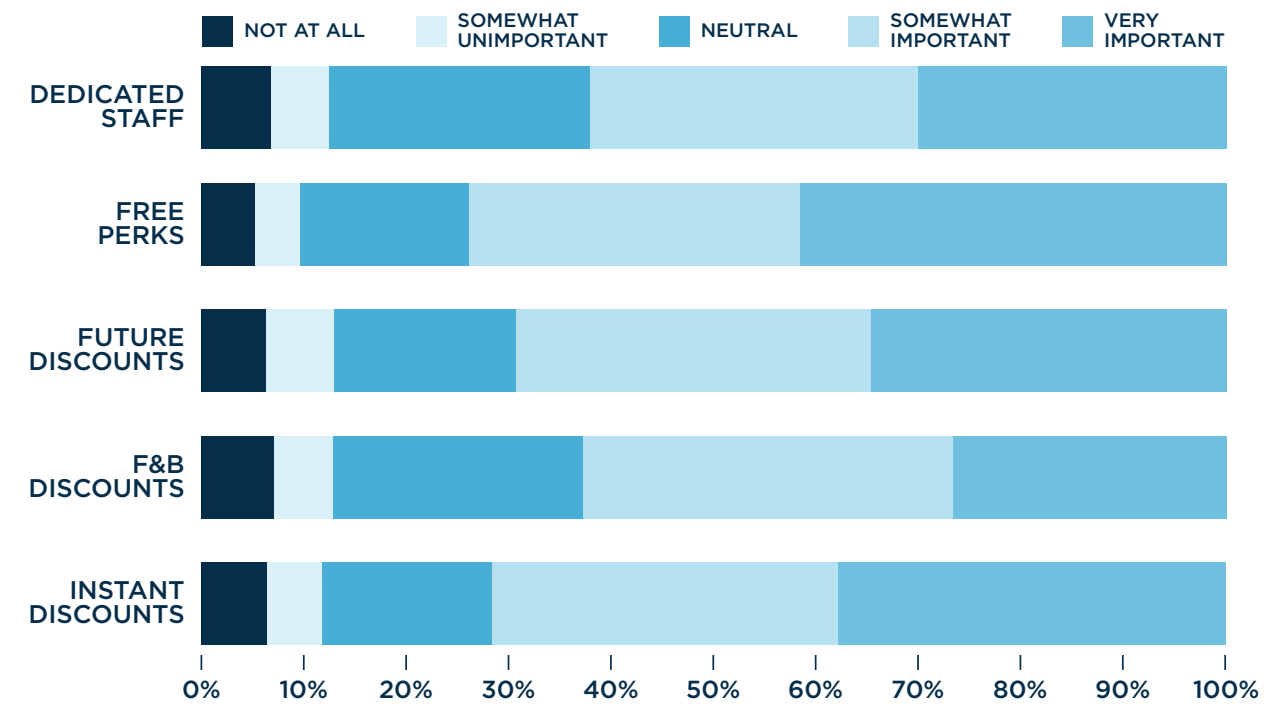


2023’s largest jump from last year’s data is here, where 68% of respondents indicated that they were influenced by loyalty programs compared to just 45% in 2022.

Loyalty programs are important to today’s traveler. It’s time for independent hoteliers to dedicate well-deserved effort toward the creation and implementation of the program that two-thirds of their potential guests rank as important.

As you build your property’s loyalty program, keep in mind that leisure travelers value **free perks and instant discounts**. Though the promise of **future discounts** play an important role in incentivizing membership, data largely points to a guest’s on-property experience to decide whether or not they return to your hotel.

RANK THE IMPORTANCE OF THE FOLLOWING LOYALTY PROGRAM BENEFITS:



➤ TravelBoom Take:

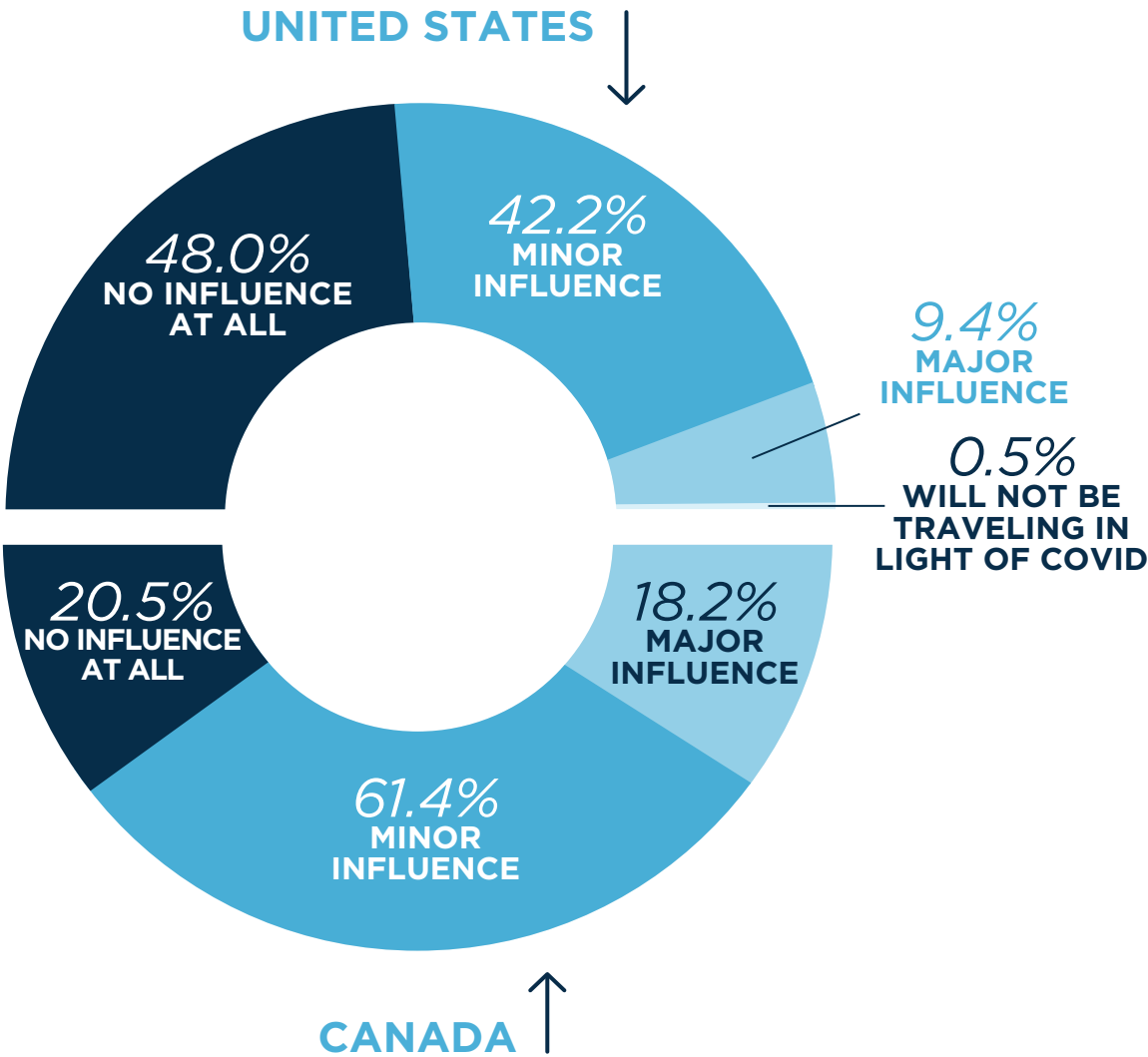
Your loyalty program should focus on more than guest history. Initial sign up bonuses and on-property perks can drive membership, while longer-term benefits and discounts can encourage guests to keep coming back.

Covid's Influence on Leisure Travel

For the first time since the start of the pandemic, the majority (90.1%) of respondents indicated that Covid-19 has either **no influence** or only a **minor influence** on their travel plans.



How much influence does COVID have on your travel plans?



TravelBoom Take:

TravelBoom will retire Covid/pandemic questions after this year, but that doesn't mean hoteliers should stop looking for ways to help their guests feel safe from a health perspective. The data shows that travelers are still influenced by clean rooms, personal space, and an attention to visible hygiene processes.

What do Leisure Travelers Want Hoteliers to Know?

WE ASKED: How can hoteliers convince you to visit?



What is *one thing* a hotel could do that would convince you to book a stay?

New for 2023, we asked respondents to share insight into this complex open-ended question. Though there is no statistical relevance here, this candid look into the minds of potential guests is invaluable for hoteliers.



FREE NIGHTS

The most commonly requested sale was for free nights based on the length of the stay. While some respondents were interested in a percentage discount, it appears that most respondents were looking for a reason to extend their stays. We recommend testing your promotional messaging: does “stay 4 nights, get the 5th for free” or “20% off” work better for your audience?



FREE CANCELLATION

This request appeared frequently in both this section and other responses – travelers need the assurance that they can cancel their trip without penalty if something comes up.



REASONABLE RATES

Respondents consistently asked for fair and reasonable prices, in addition to rate guarantees. Respondents also noted that sales are important, but what they’re really looking for is clear pricing that doesn’t feel excessive.



BRING BACK BREAKFAST

Continental breakfast was largely lost to the Covid pandemic due to cleanliness concerns. Respondents are eager to find a property that includes breakfast in their rate – and the same respondents often asked for lower prices.



NO MORE RESORT FEES

Respondents are frustrated with hidden fees and resort fees that feel unnecessary.



If you could tell a hotelier *one thing* or make *one request* that would make your hotel experience better, what would it be?

Results were similar to the last section here, with these key takeaways:

OUR FAVORITE UNIQUE RESPONSES:

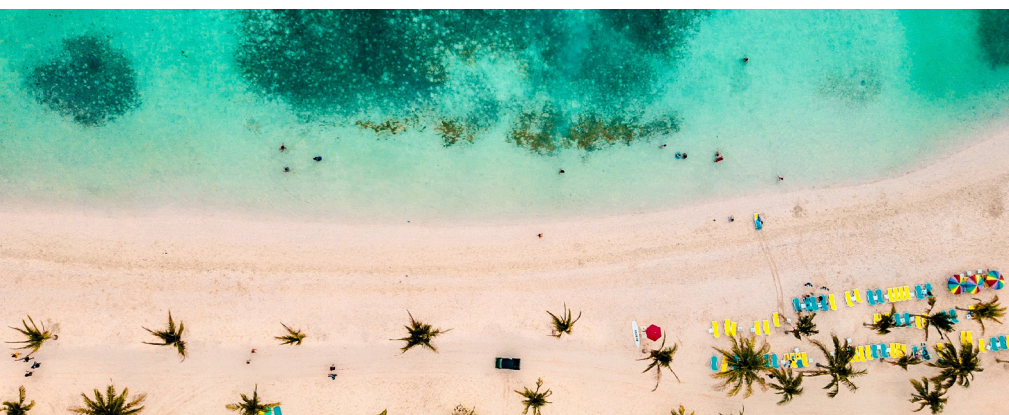
(What is one thing a hotel could do that would convince you to book a stay?)

- Have something fun at hotel. Wine tastings-ice cream sundae night
- Eliminate all the extra city and resort fees that add considerable to the cost of the vacation.
- Room upgrade, credit for amenities on site, be NICE to me, know their customer service skills.
- I love a good deal! Put rooms on sale if u book ahead! Drop all the hidden fees? I pay resort fees when it not even at a resort!! Why? Do that!
- Have some great deals! People want to travel with their families, but the economy is just awful! So sad!
- Quit raising the dang prices during the summer. If you can lower it in the winter then quit being greedy and jacking it up in the summer.
- Offer some type of gift like 1 night free if you book a 4 night stay, or a dinner voucher, or something worth getting DURING the stay.

- **BE FRIENDLY:** Nearly a third of all respondents mentioned friendliness, citing that they're running out of patience for staff attitudes and little attention to detail.
- **BE CLEAN:** Respondents continually mentioned dirty rooms, broken appliances, wobbly toilets, and other maintenance and housekeeping issues. Higher prices should yield a higher level of service, but this data suggests that many hoteliers may be doing the opposite.
- **BE PET-FRIENDLY:** Many travelers became pet parents during the pandemic, and a popular request among respondents was the ability to bring their furry friends along on their trips.
- **DON'T BE PET-FRIENDLY:** Other respondents don't want travelers bringing their pets on trips – the exact opposite of the above request.

➤ TravelBoom Take:

It's clear that hoteliers have room to improve their guest satisfaction, especially as higher fees lead guests to expect a better experience. This is both a great opportunity for the true hotelier to deliver on their promises of a spectacular vacation, and a massive warning to hoteliers struggling with staff and rates – traveler patience is wearing thin, and you could lose valuable business.





Conclusion & Key Takeaways



Travel is looking *strong* in 2023.

Travelers are back on the road, and they're vacationing more often. There was a 7% increase in those who went on at least 1 vacation lasting 5 or more days, and a 15.5% increase in respondents who had taken 2 or more trips – great news for hoteliers hungry for guests.

Loyalty programs are growing in importance.

A 45% increase in the ability to influence where a traveler books their stay is massive, and any program your hotel can put in place to provide immediate booking value and on-property perks will increase your conversion rate. We expect this to continue, and recommend properties invest the time, budget, and technology to incorporate a solid loyalty program into their strategies.

Find a new way to *connect socially*.

While this study shows that social media doesn't necessarily influence travelers to book a vacation, there is no denying the positive effect that a solid social media strategy can have on any business. Today's leisure travelers want information at their fingertips, and hoteliers can use their social media strategy to make finding that information a breeze.

Hotel websites need to *convert*.

This study found that leisure travelers under the age of 45 book online 87% of the time, while those under 25 book online 100% of the time. This shows that your hotel's website **MUST** invest in providing a seamless, efficient booking experience for your guests, otherwise you'll lose bookings to OTAs and other competitors.

Hoteliers *gotta'* hotelier.

While we've learned that a majority of travelers are no longer concerned about Covid, there is a lingering side effect of the pandemic affecting them: poor customer service. Hoteliers looking to drive repeat bookings should take this as a warning that if guests don't feel welcome and special on your property, they'll look elsewhere.

Economic shifts may lead to *travel shifts*.

With almost half of respondents indicating that they were very concerned with their country's economy, you would expect a downward trend in their spending – but only 14% of those same respondents said they were very concerned about their personal economy. This means that travelers are going to be more discerning about how they spend their money, and hoteliers will have to improve their value proposition to satisfy those standards – especially if their prices have increased.

Covid is gone, but the lessons *should stay*.

It's time for hoteliers to get back to focusing on selling the amenities, attributes, and overall experience that make their property unique, while keeping in mind that guests still have higher safety and cleanliness standards since the pandemic. Hoteliers should continue applying lessons learned during the pandemic, like skillfully reducing overhead without sacrificing quality and maximizing technology to reduce reliance on labor.



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