

2020-2021

# Traveler Sentiment & Influences

**expedia group**<sup>™</sup>  
media solutions



# Travel advertising platform

We connect advertisers with **hundreds of millions of travel shoppers** globally on Expedia Group brands.





# Exclusive data

Only we can offer insights from our **300 petabytes** of Expedia Group owned real-time global travel intent and demand data from our leading branded sites around the world.

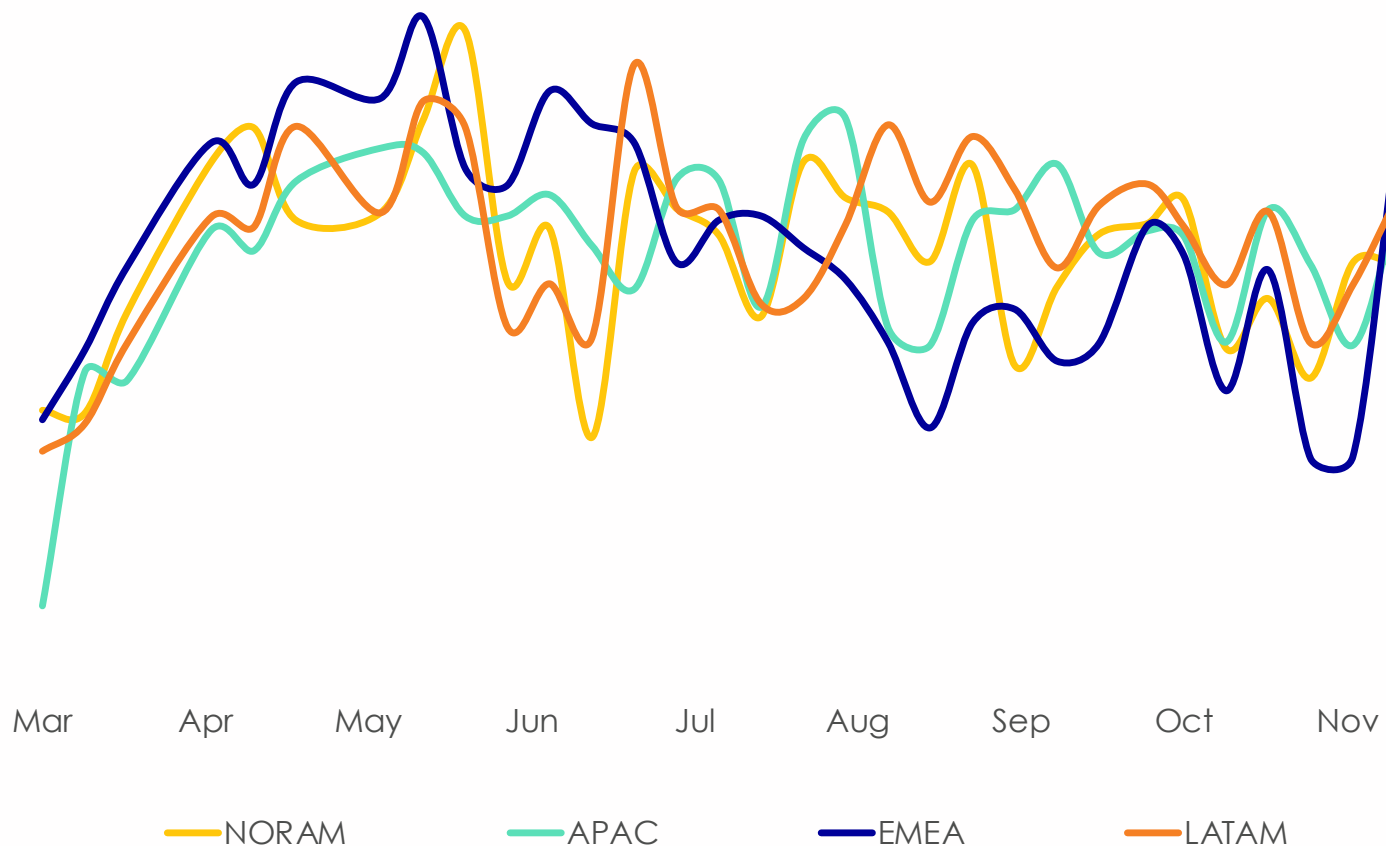
# Travel searches continue to fluctuate

Travel Searches by Super Region 2020 | WoW Search Percent Change 2020

We are tracking and sharing week over week percent changes in travel searches on our Expedia Group brands around the world to understand the impact of the pandemic on travel at a regional level.

We all experienced a significant decline in travel early in 2020. Over the course of 2020 we saw data and travel patterns fluctuate week by week. We saw searches increase in May and peak in early June before declining and then rising again in August.

As everyone keeps a watchful eye on vaccine news and signs of improvement in local regions, we expect that pent-up demand for travel will continue to grow around the world.



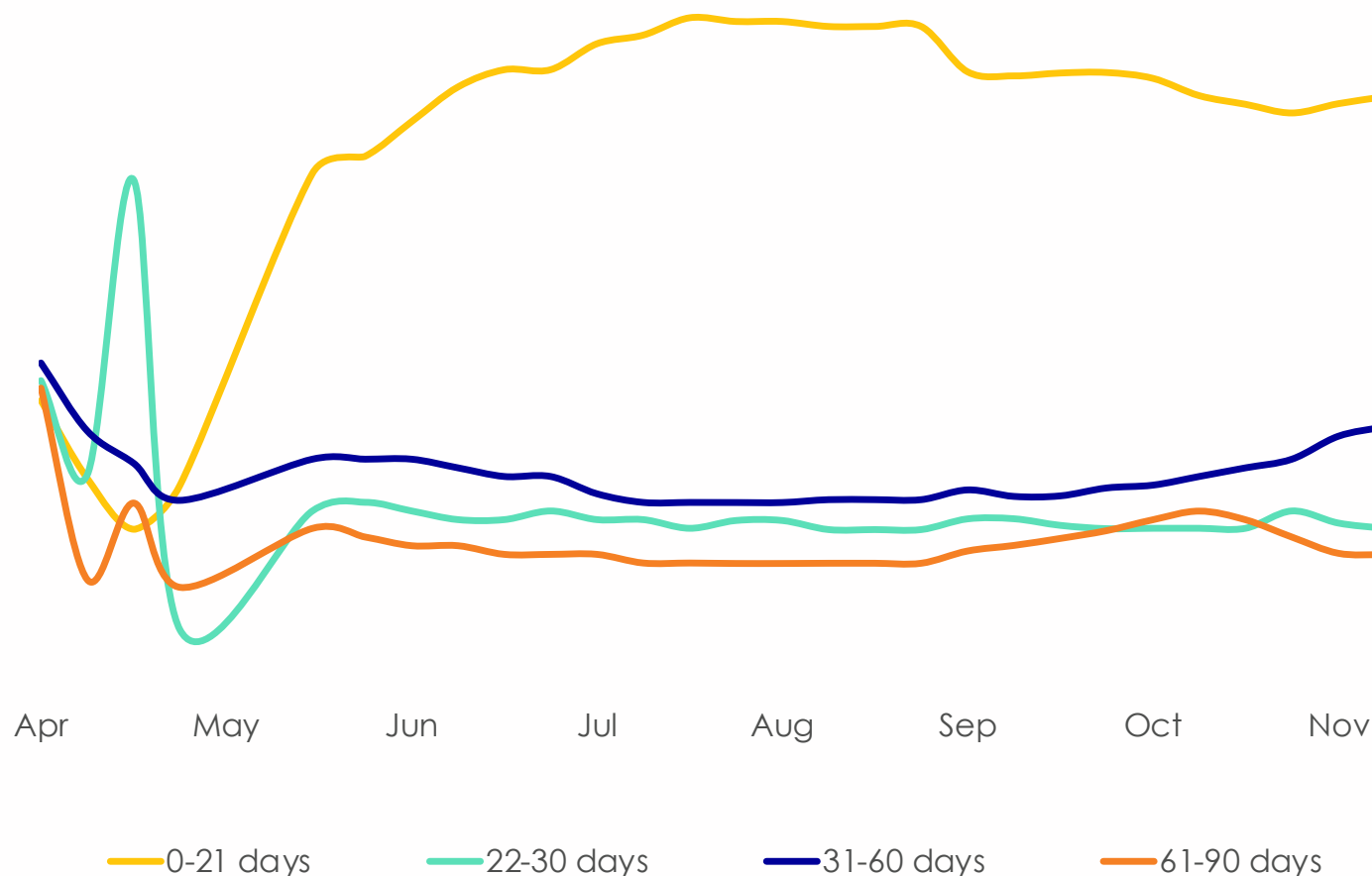
# Travelers are mostly searching 0-21 day window

What has remained consistent since May is that—aggregated globally—the 0-21 days out search window is the most dominant.

The share of the 31-60 day search window inched up in October and into November as travel shoppers looked to reunite with their families and loved ones, and to get away during the holidays.

We can expect that travelers continue to opt for shorter-term planning into the next year.

Weekly Search Windows | Percent Share 2020

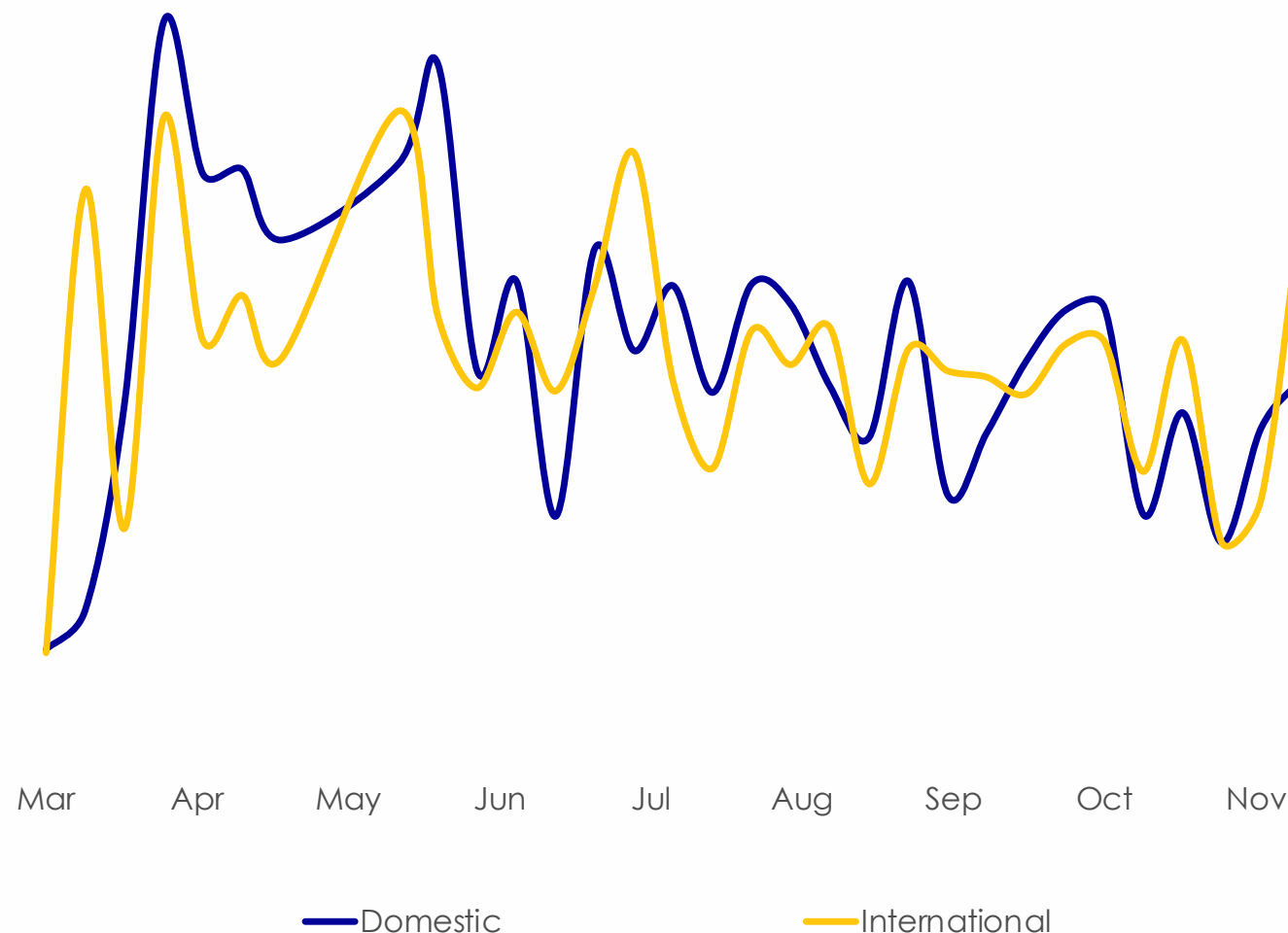


# Domestic travel searches lead international ones

Globally, domestic travel searches have largely led international searches since April.

The impact of positive, early vaccine news had a pronounced impact in November, with international travel being the main beneficiary.

Domestic & International Searches | WoW Search Percent Change 2020



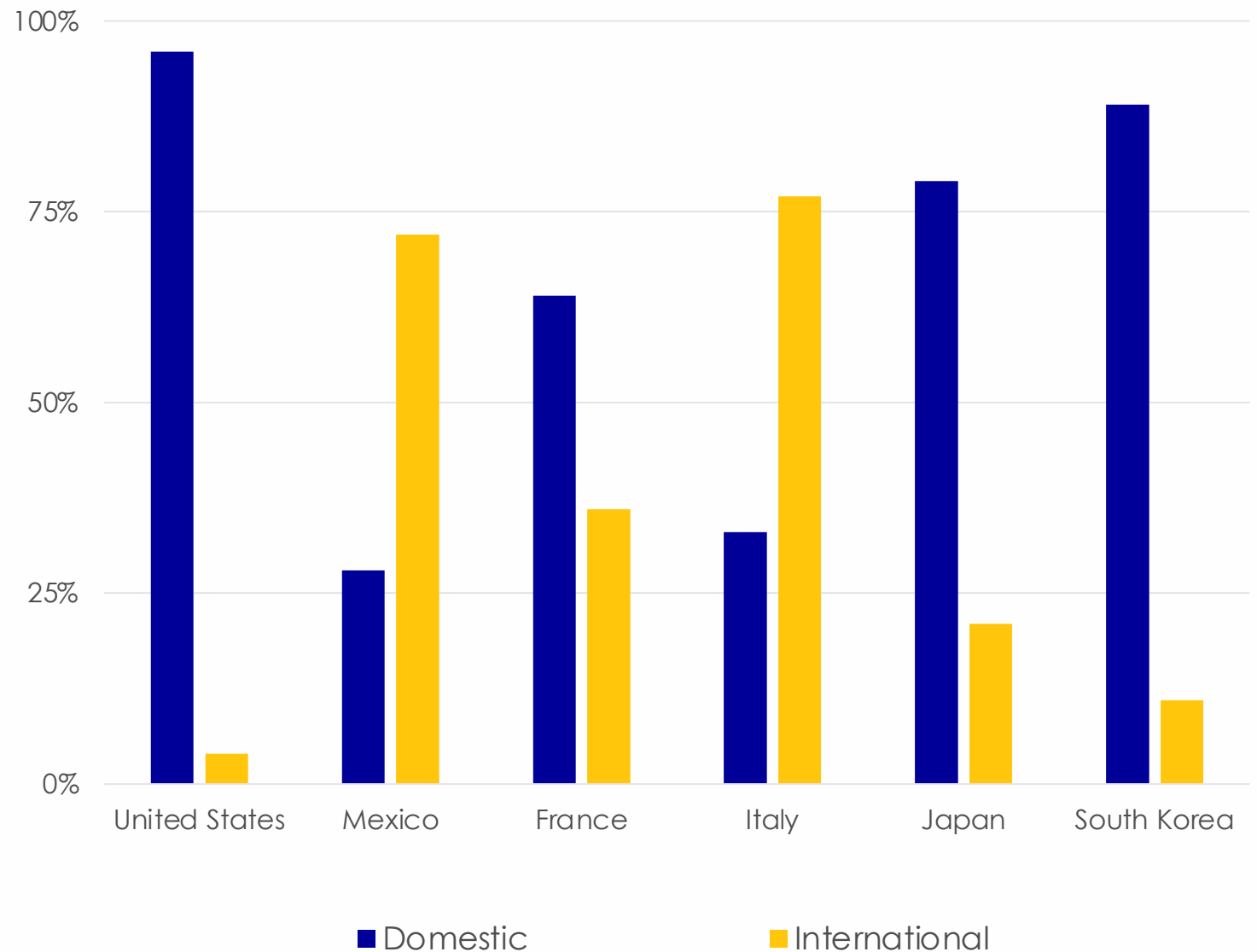
# Travel searches vary around the world

We looked at the percentage share of domestic and international travel searches across six countries in early November as an example of how widely these can vary.

For instance, 96% of all the searches that took place for the United States were domestic. In other words, few people across the world were looking to travel into the U.S. in early November.

However, looking at Mexico and Italy, searches from travelers outside those countries—that is, international searches—dominated in early November.

Domestic & International Searches By Country | Percent Share Week of 9 November 2020



# Visitors are dreaming

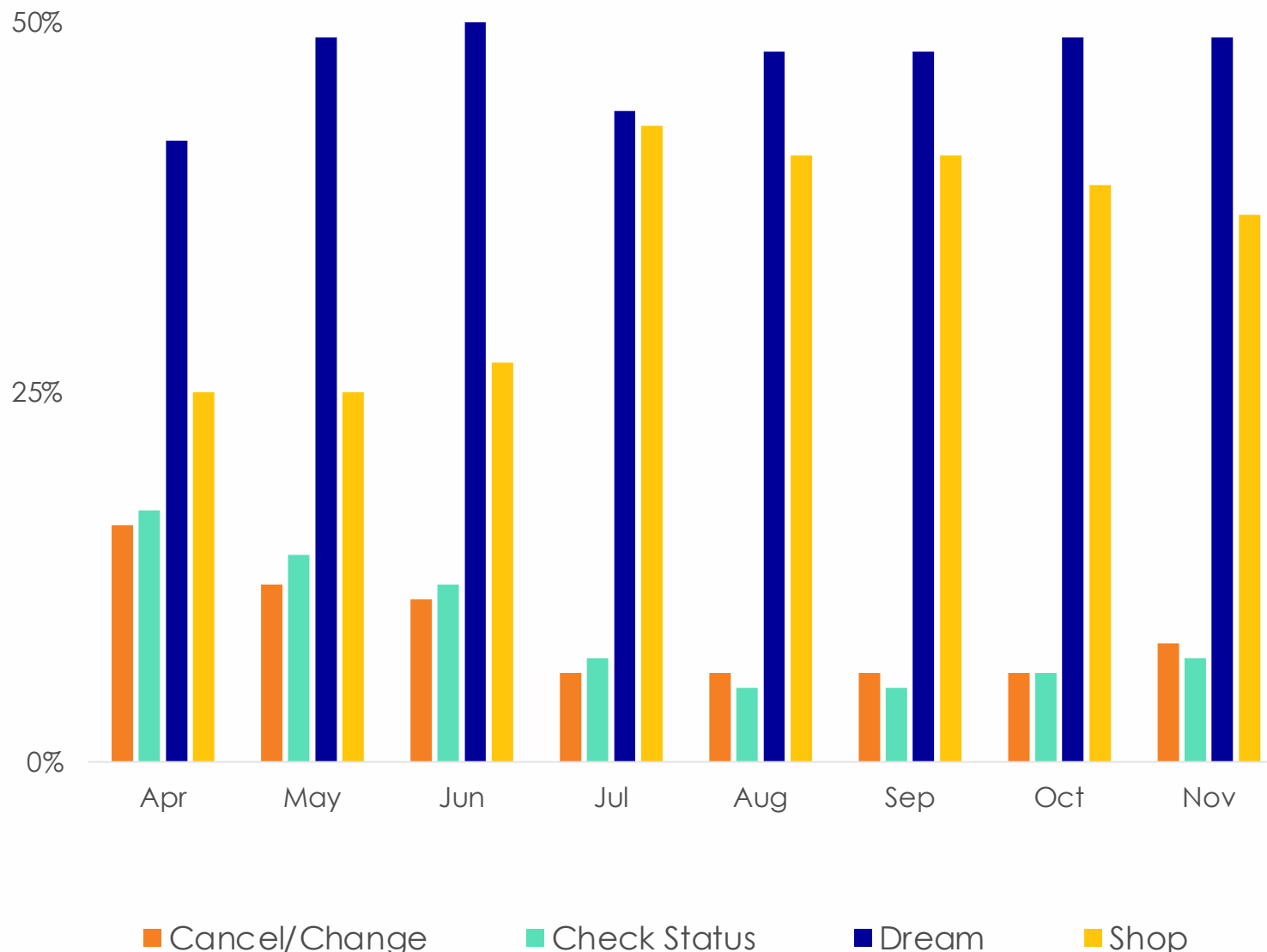
Our user research team conducts intercept studies on Expedia.com sites around the world to understand the purpose of their visit, and the stage of the purchase journey they are in when visiting the site.

In the early days of the pandemic, many people came to change or cancel travel, which has declined steadily.

Even more prevalent—even in those early days—is that travel shoppers are largely visiting our Expedia.com sites to dream about their next trip. That took a dip in July when shopping almost caught up.

Travelers continue to come to our sites largely to dream, with shopping close behind.

Reasons for Visiting Expedia.com Sites Worldwide | Percent Share 2020





# Custom industry research

We bolster our own data on traveler intent and demand with custom industry research on the why and how behind traveler influences, motivations, and decisions.



2020-2021

# Understanding Traveler Sentiment & Influences



# Study Overview

**Expedia Group Media Solutions conducted a study with Northstar Research Partners to understand how the pandemic has impacted the hearts and minds of travelers around the world in 2020 and looking ahead to 2021.**

The study used an amalgamated group of best-in-class panels in October 2020 with 11,000 travelers across 11 countries, including:

	 Global	 Germany (DE)
NORAM	 United States (US)	 United Kingdom (UK)
	 Canada (CA)	EMEA
	 Brazil (BR)	 France (FR)
LATAM	 Mexico (MX)	 Italy (IT)
		 China (CN)
		APAC
		 Japan (JP)
		 Australia (AU)

The study looked at leisure, business, and bleisure travel, which is extending a business trip for leisure.

The respondents represent a variety of generations and demographics for a broad and inclusive understanding of what travelers consider when making destination, transportation, and/or accommodation related trip decisions.

The generations include:

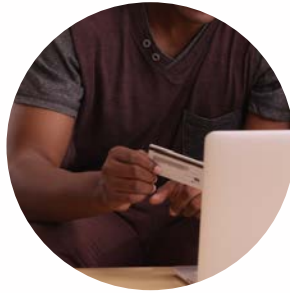
- Silent Generation (Born prior to 1946)
- Baby Boomers (1946-1964)
- Generation X (1965-1979)
- Millennials (1980-1994)
- Generation Z (1995-2001)

## Executive Summary



### Rejuvenate & Recharge

Pandemic fatigue is setting in and there is pent-up demand – people seek travel to rejuvenate and recharge



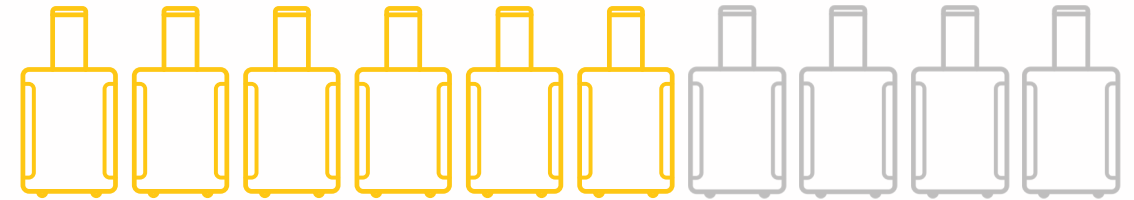
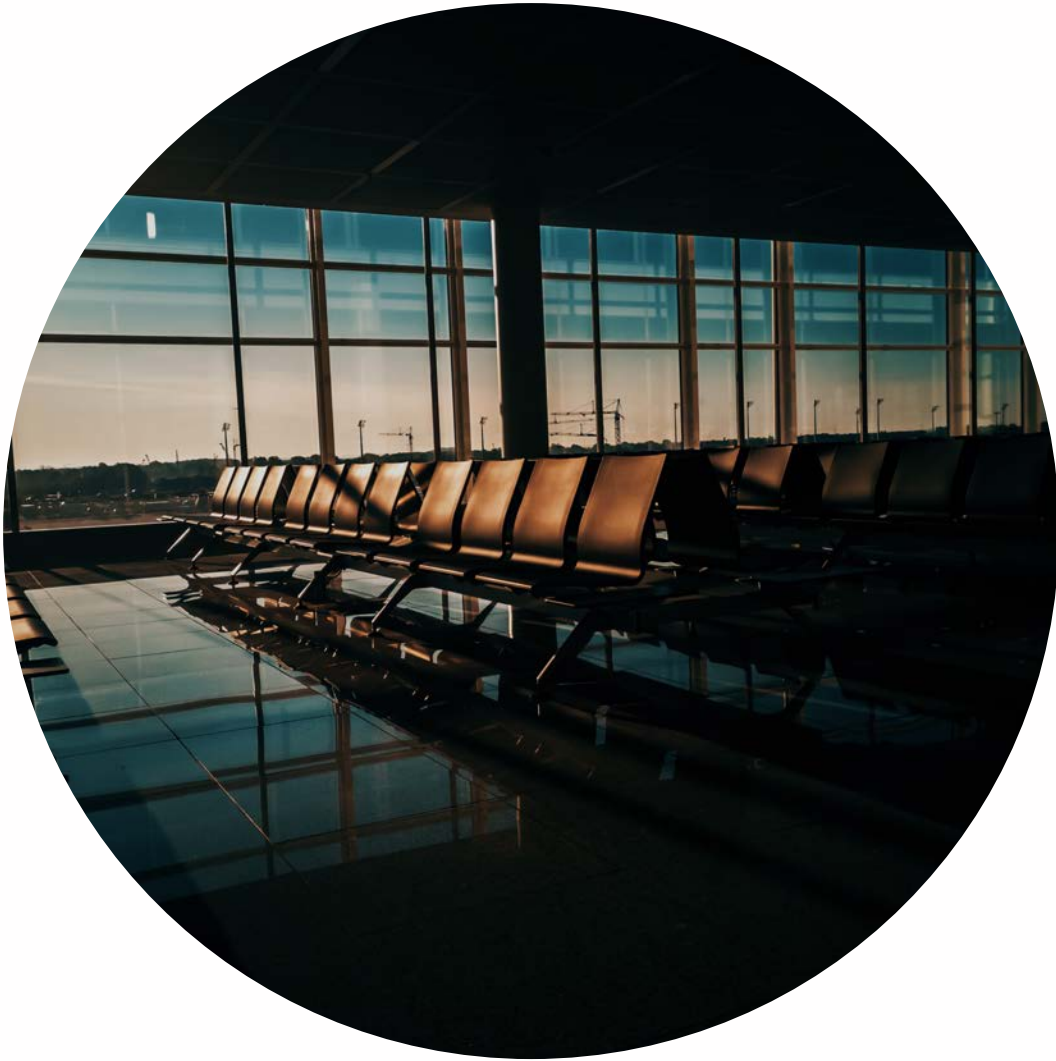
### Hygiene & Flexibility

Travelers want to minimize risk to their health and protect against financial setbacks



### Reassuring Content

Brands can reassure travelers with messaging and imagery on pandemic protocols, flexibility, and financial security

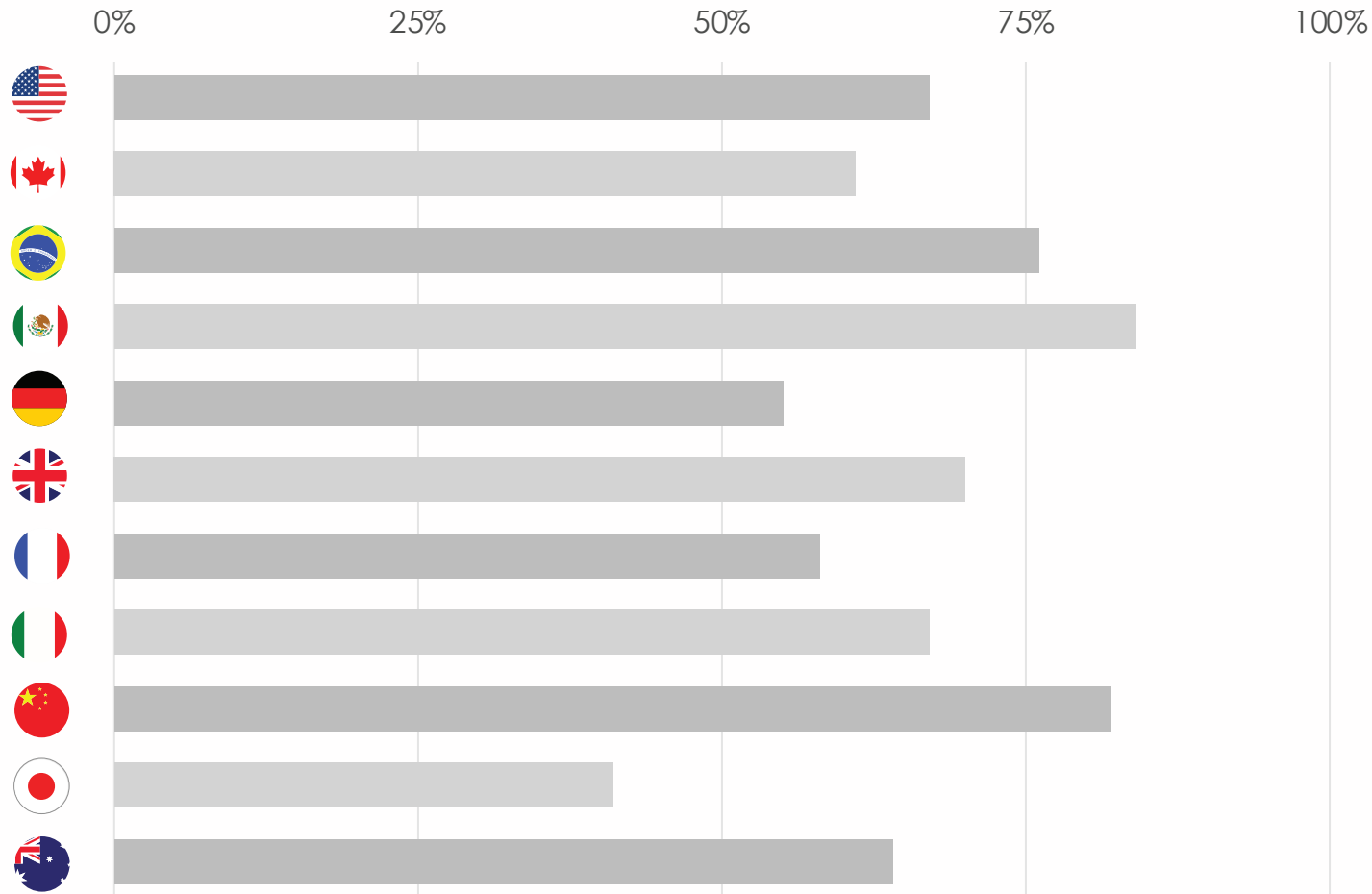


**6 in 10**

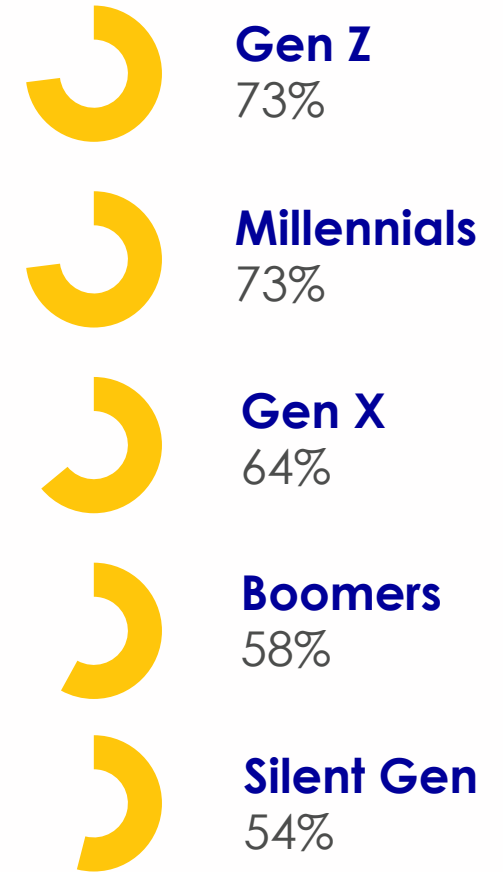
travelers globally had a planned trip cancelled due to COVID-19

# Younger travelers and Brazilian, Chinese, and Mexican travelers were more impacted by cancelled trips due to COVID-19

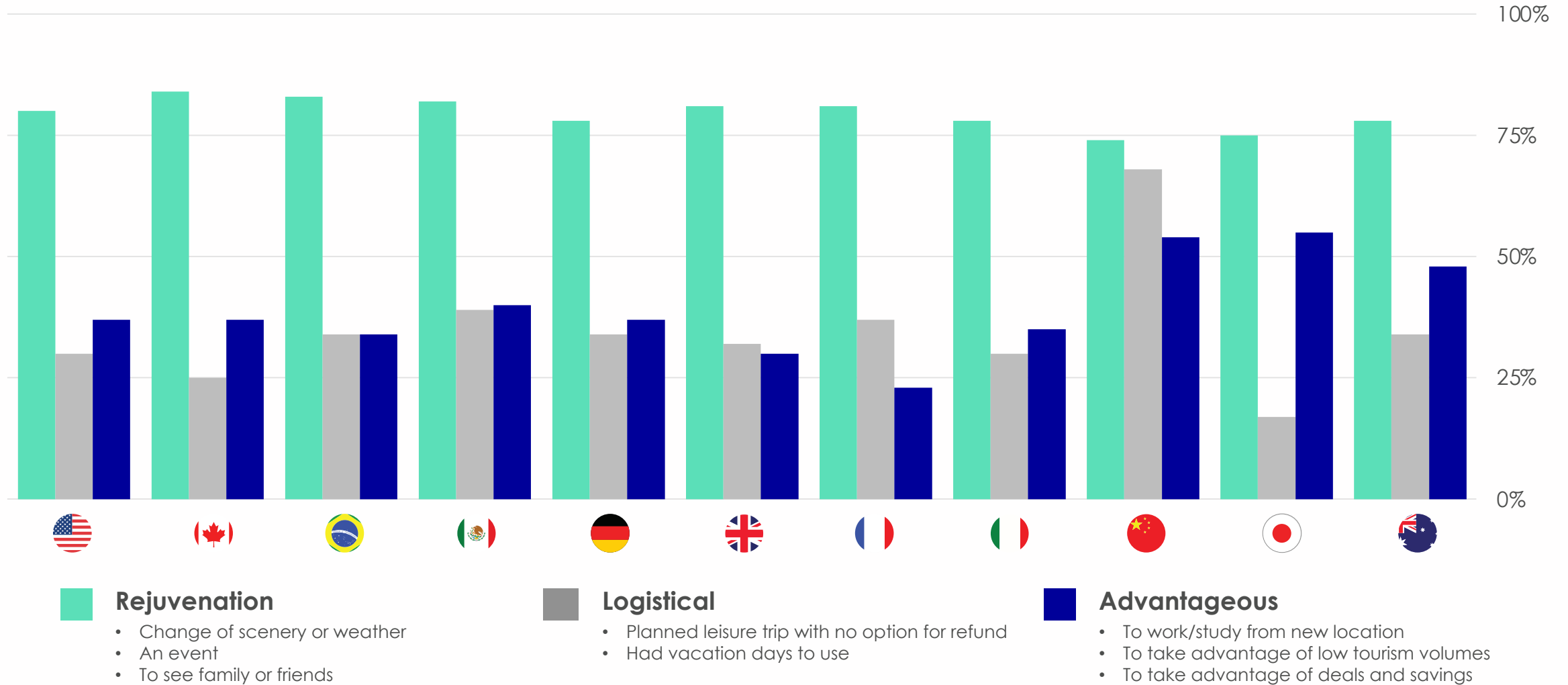
Percent of Travelers by Country



Percent of Travelers by Generation



# Rejuvenation drove leisure trips during the pandemic



# Millennials took more leisure trips

than other generations during the pandemic and were most driven by a change of scenery. Meanwhile, the Silent Generation traveled to see family and friends far more than the other generations.

## Took a Leisure Trip

Gen Z  
38%

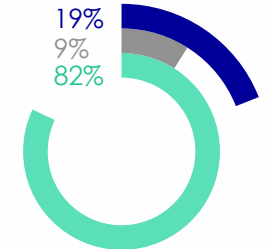
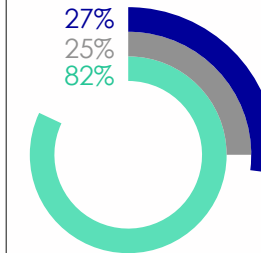
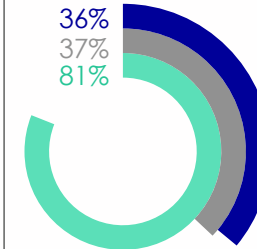
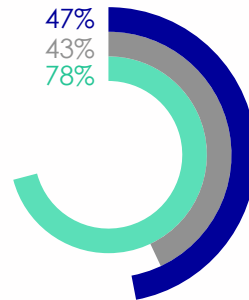
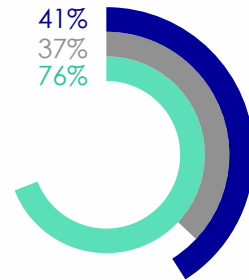
Millennials  
42%

Gen X  
30%

Boomers  
26%

Silent Gen  
23%

## Type of Leisure Trip

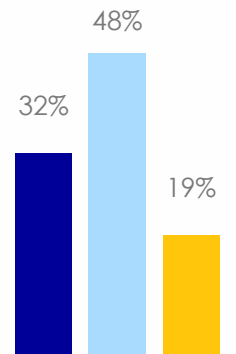
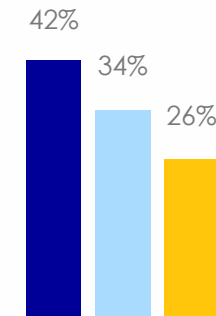
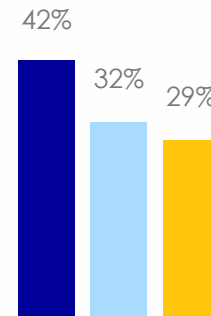
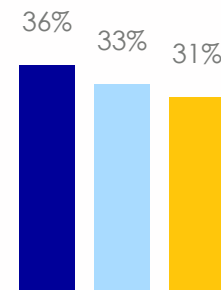
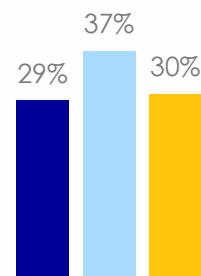


Rejuvenation

Logistical

Advantageous

## Reason for Leisure Trip



Change of Scenery

See Family & Friends

Change of Weather



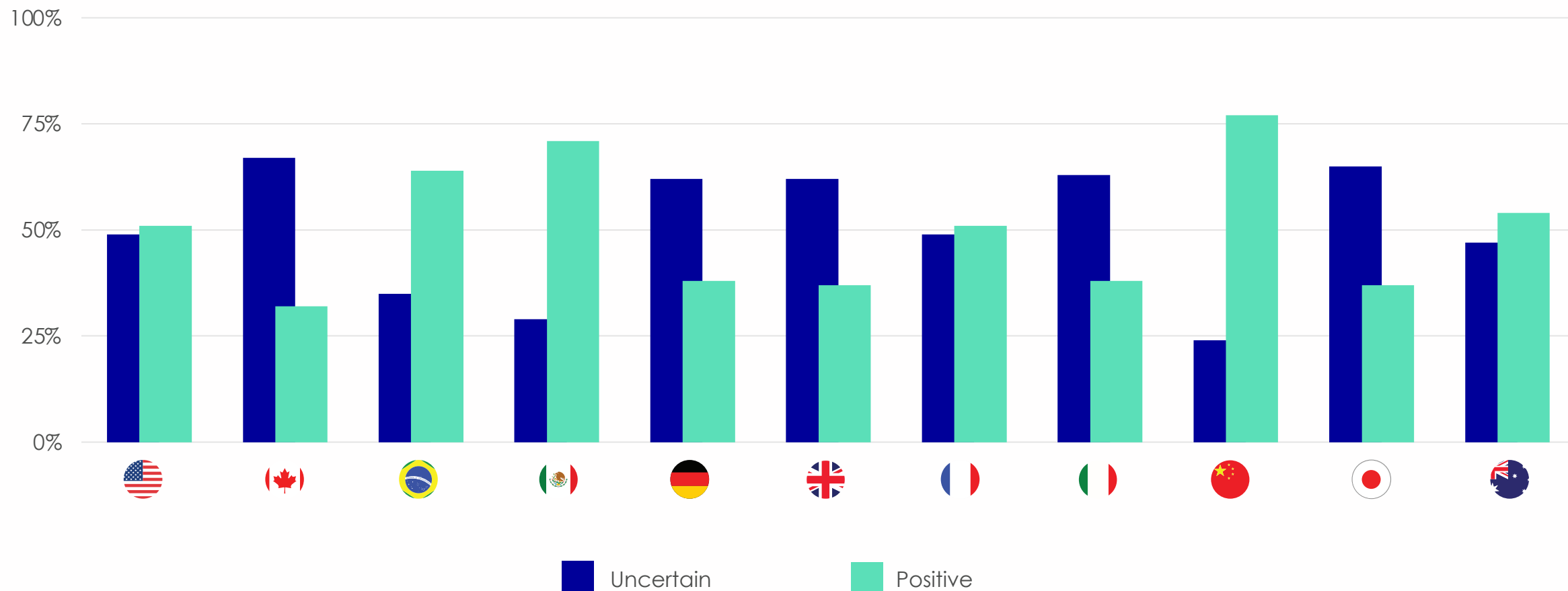


**1 in 2** 

travelers feel optimistic about taking a trip in the next 12 months. **The other half need reassurance.**

# Brazilian, Chinese, and Mexican travelers feel more positive about traveling in the next 12 months

Canadian, Japanese, Italian, German, and British travelers are more uncertain

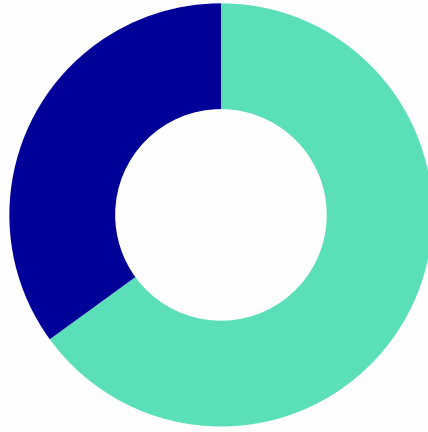


# Younger generations have a more positive outlook

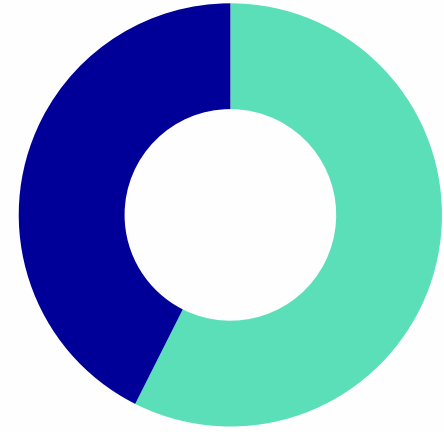
about traveling in the next 12 months. Uncertainty increases with age.

■ Uncertain

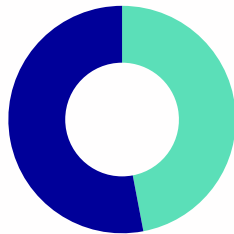
■ Positive



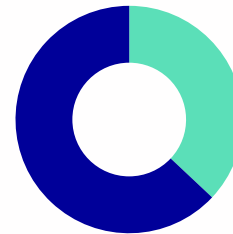
**Gen Z**  
Uncertain **35%**  
Positive **65%**



**Millennials**  
Uncertain **43%**  
Positive **58%**



**Gen X**  
Uncertain **53%**  
Positive **47%**



**Boomers**  
Uncertain **63%**  
Positive **37%**



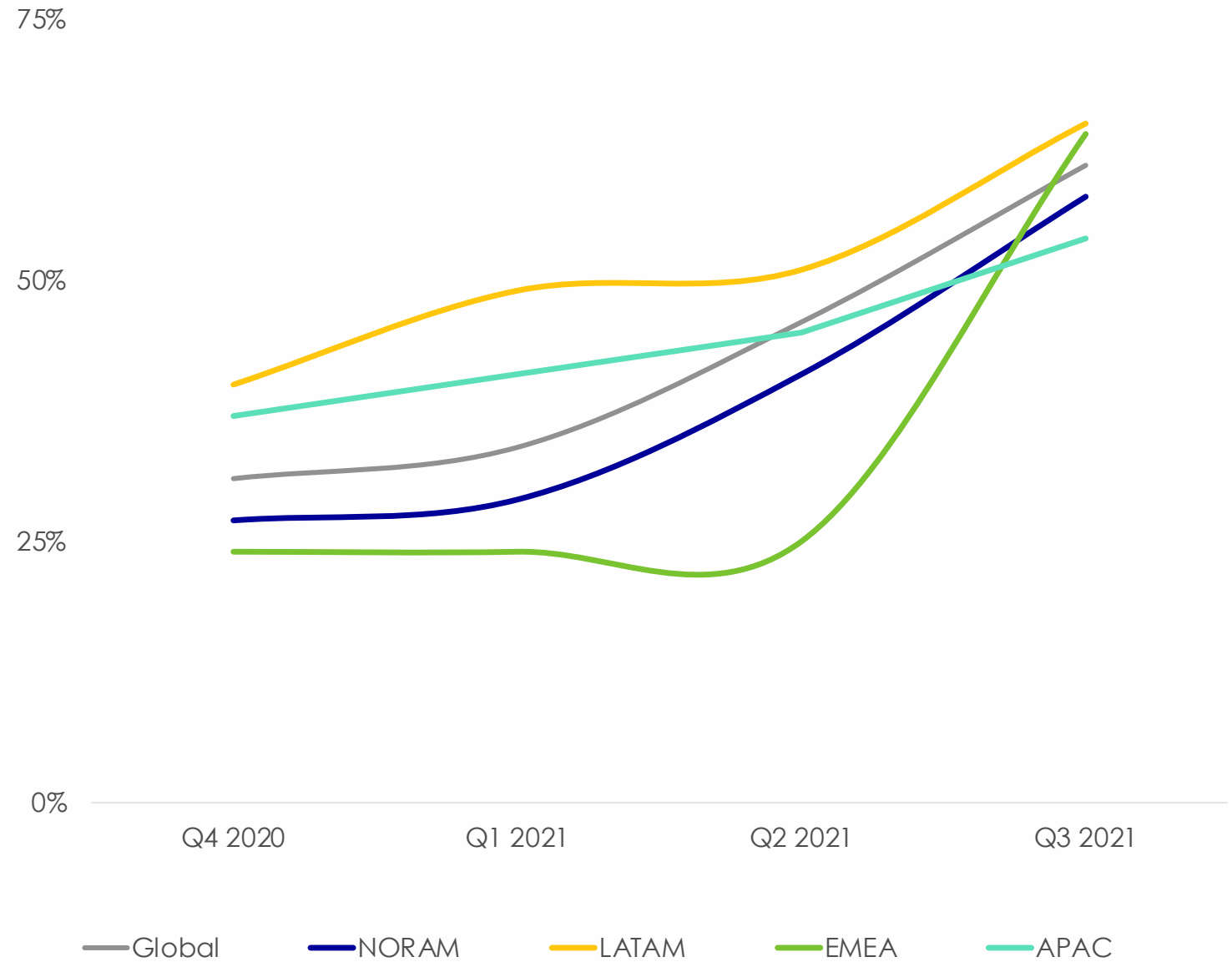
**Silent Gen**  
Uncertain **64%**  
Positive **36%**

# Travelers are more likely to take trips from April to September 2021

When looking by region, there are interesting variances.

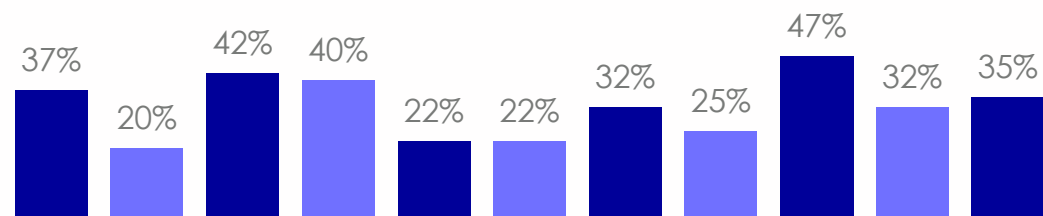
For instance, Latin American and Asia Pacific travelers show a higher likelihood of traveling sooner.

North American and European, Middle Eastern and African traveler intent increases heading into Q3 2021.

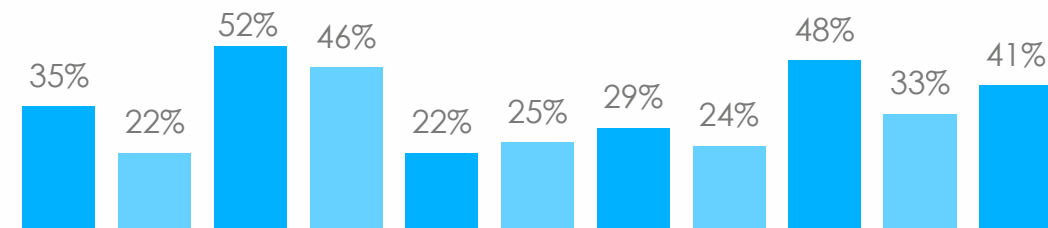


# Brazilian, Chinese, and Mexican travelers show higher likelihood to travel sooner, starting in Q1

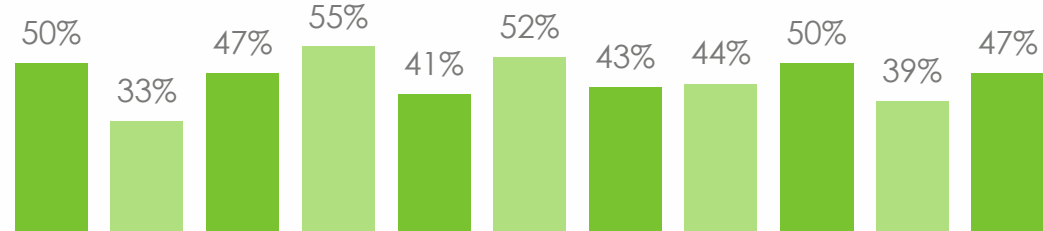
Q4 2020



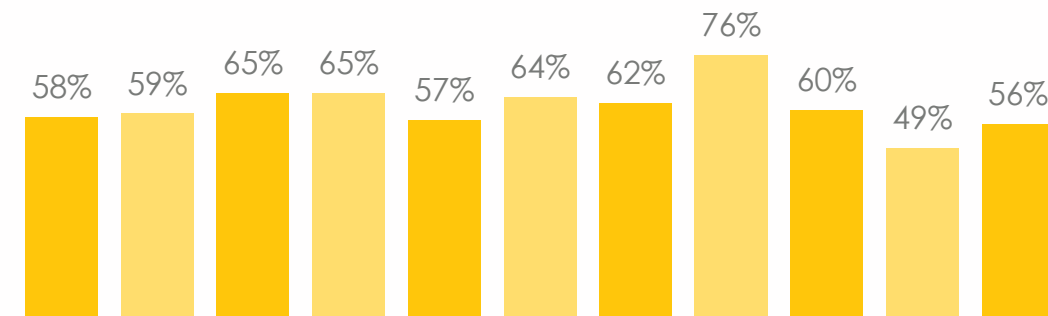
Q1 2021



Q2 2021



Q3 2021

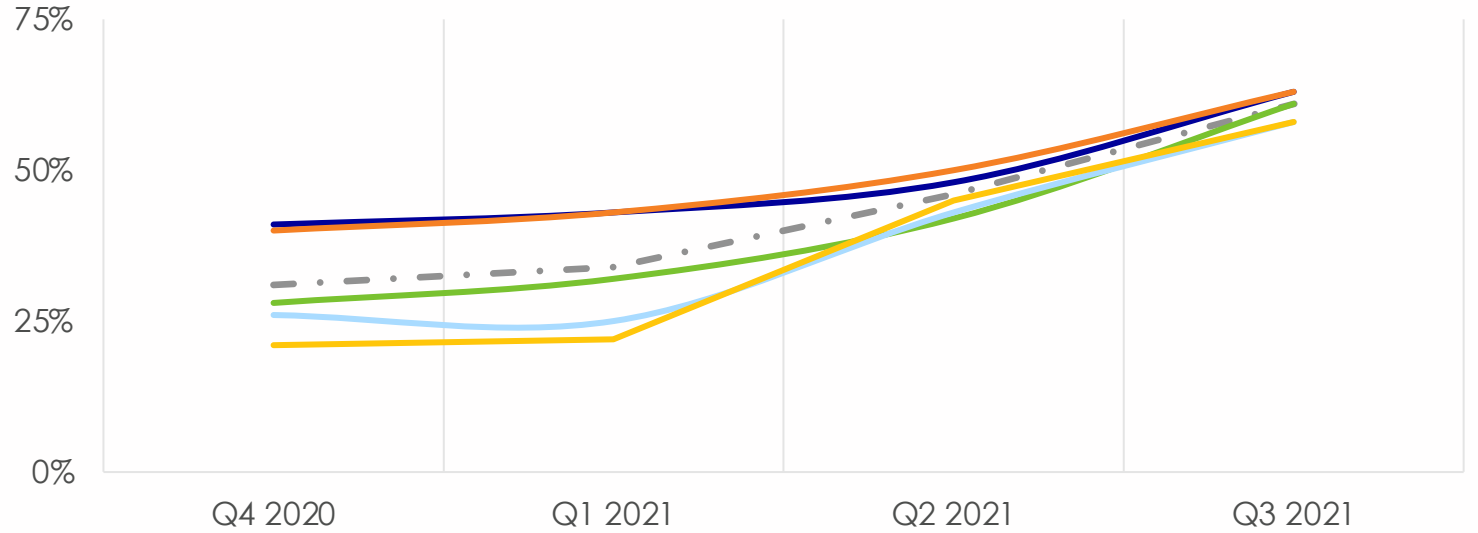


# Younger generations are leading future leisure and business travel

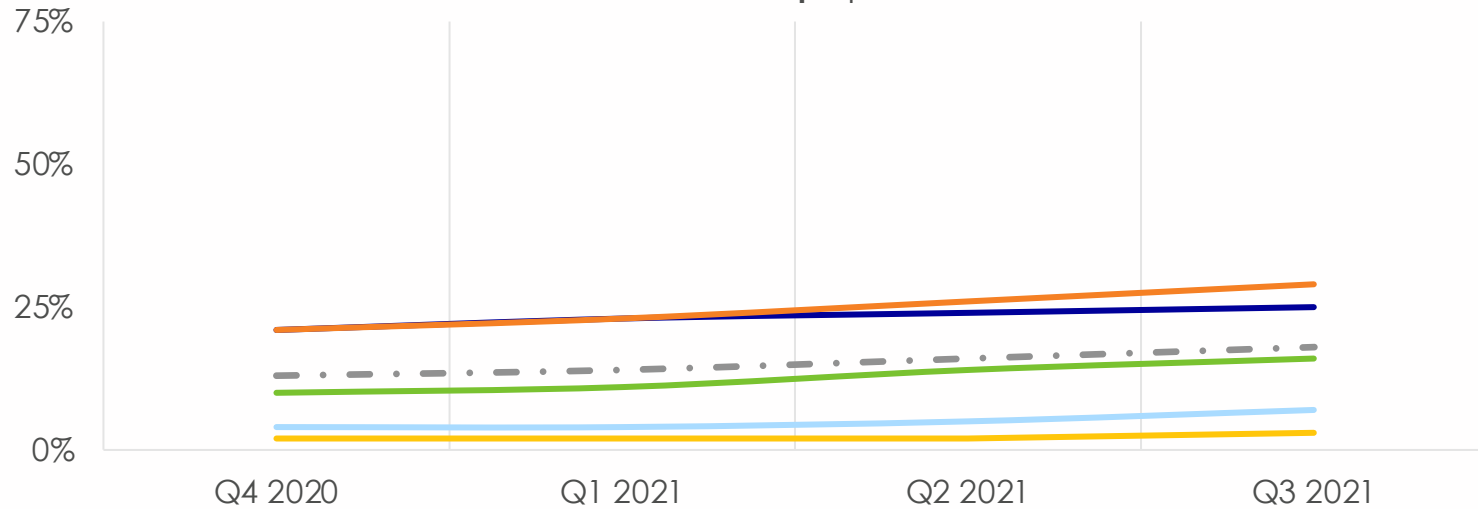
Millennials and Gen Z estimate traveling more than other generations, exceeding the global total. While their leisure travel is on par with each other, Millennials will likely drive future business travel more.

Expedia Group Media Solutions – Traveler Sentiment & Influences 2020/2021  
C1. How many trips are you likely to go on in the next 12 months?

Estimated Future Trips | Leisure



Estimated Future Trips | Business

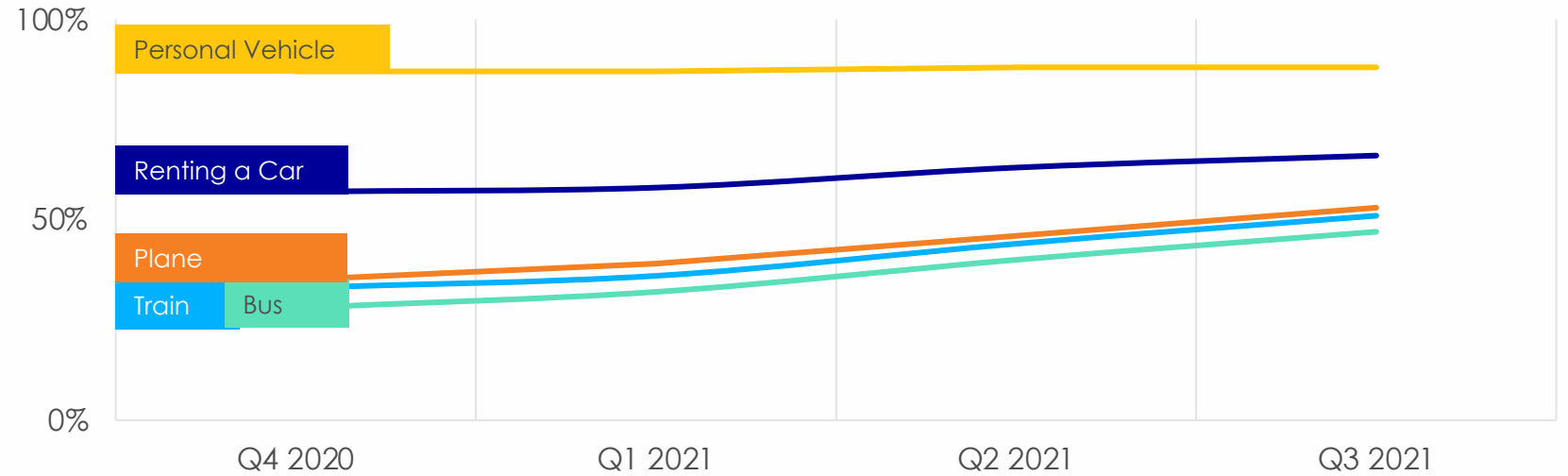


— • Global — Gen Z — Millennials — Gen X — Boomer — Silent Generation

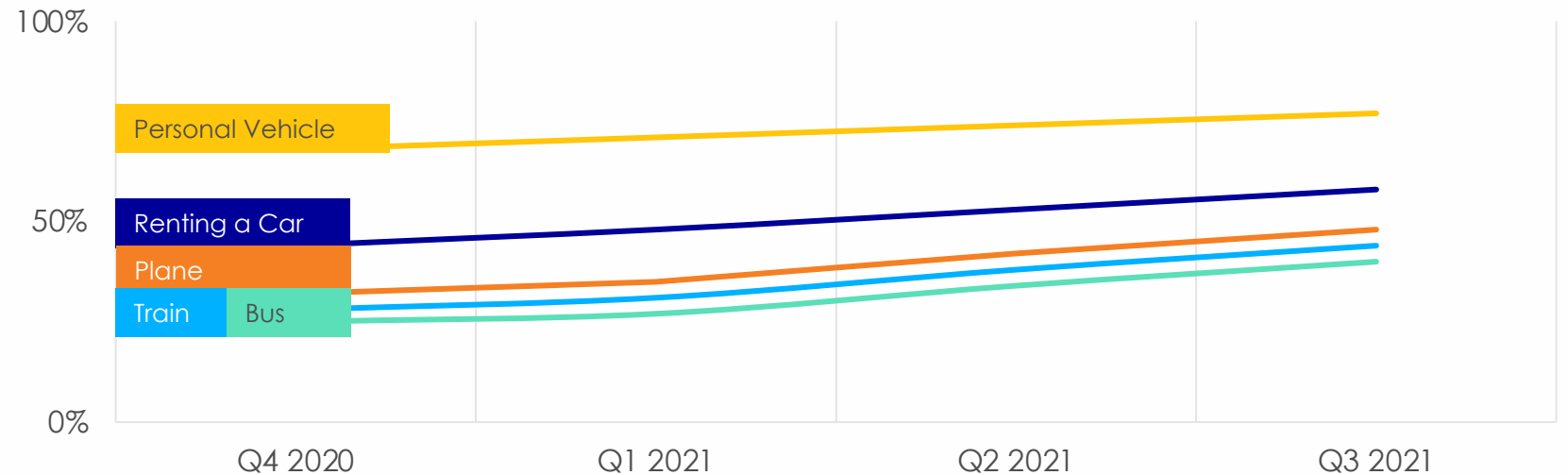
# Car travel, including renting a car, feels safer than other modes of transportation

All modes of transportation feel safer when traveling domestically than when traveling abroad.

### Safety in Transportation Decisions | Domestic



### Safety in Transportation Decisions | International





# 7 in 10

will feel more confident traveling in the next 12 months with **flexibility** – such as travel insurance and trip protection, full cancellations, and refunds on transportation and accommodations.

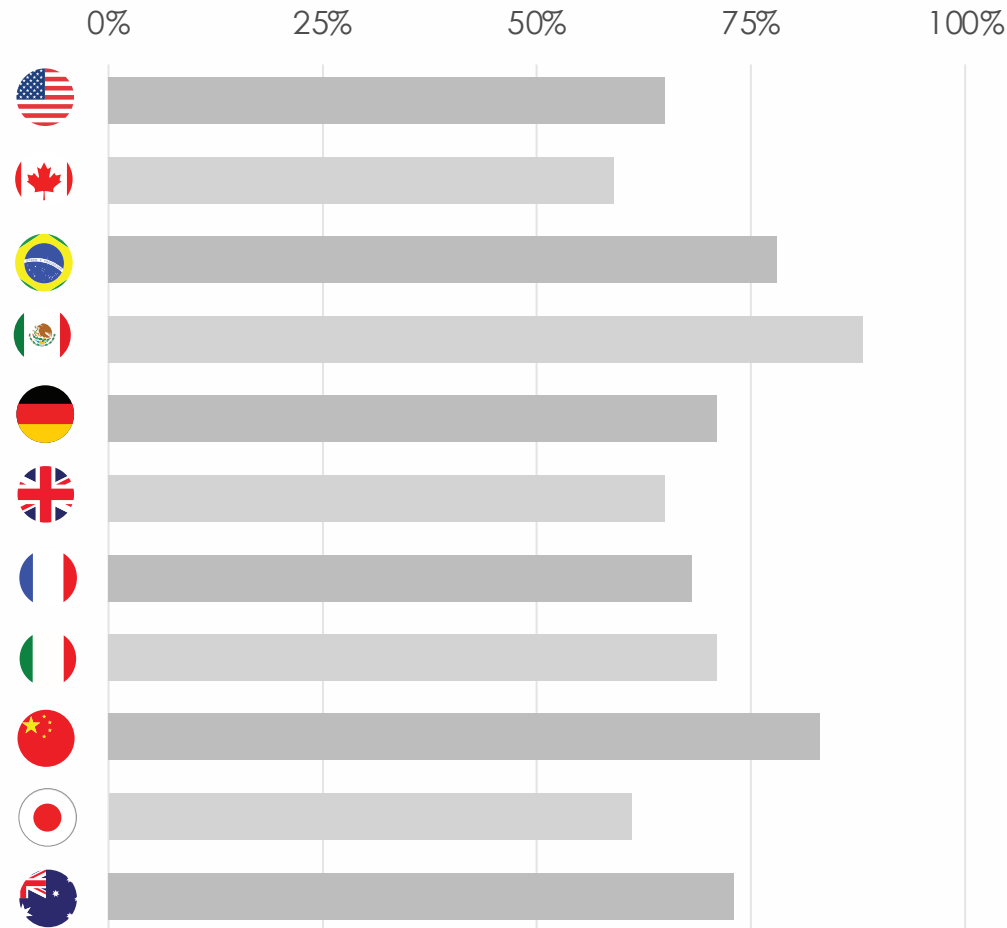


# Flexibility is especially important to younger generations and to Latin American and Chinese travelers

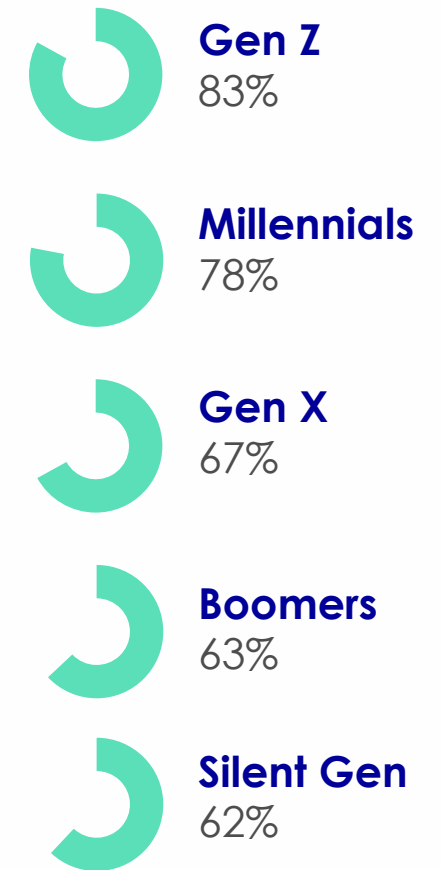
Travelers are more comfortable traveling for leisure in the next 12 months with the following:

- Travel insurance or trip protection
- No concerns about health care expenses or coverage
- Access to full cancellation and refunds on **transportation**
- Access to full cancellation and refunds on **accommodations**

Percent of Travelers by Country

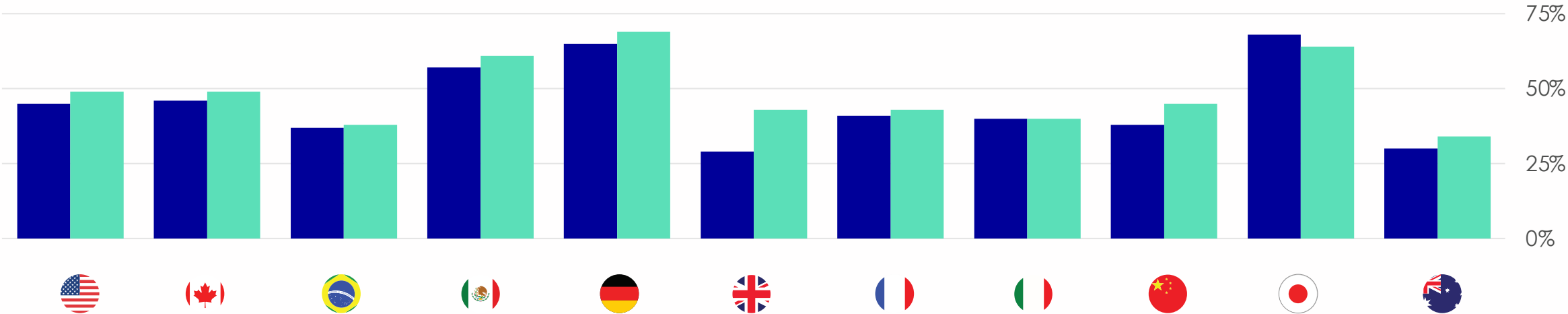


Percent of Travelers by Generation



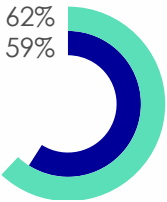
# Health closely follows flexibility in importance; travelers are reassured by travelers following guidelines on cleaning and hygiene

Percent by Country

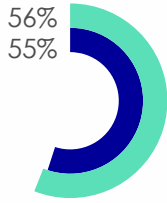


Percent by Generation

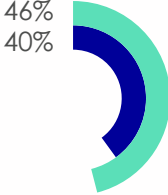
**Gen Z**



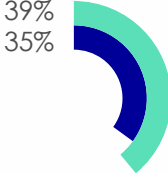
**Millennials**



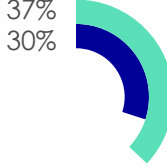
**Gen X**



**Boomers**



**Silent Gen**

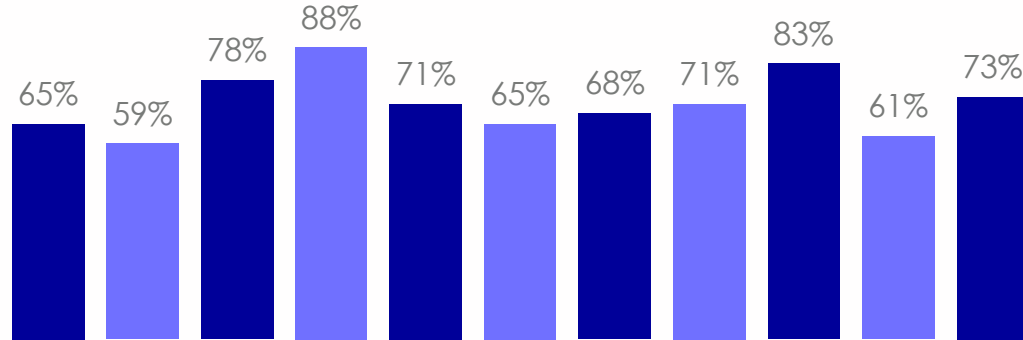


- You are traveling with safety supplies such as mask, disinfectants, and sanitizers
- Your accommodations are strictly following CDC guidelines on cleaning and hygiene

# The most important factors that can influence confidence in travel over the next year varies by country

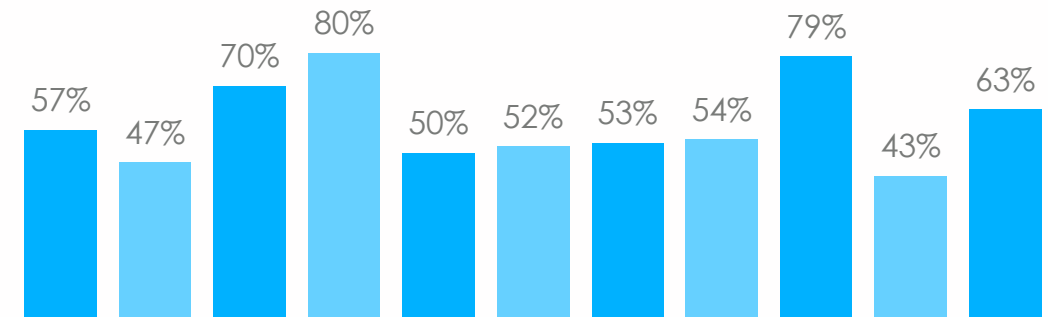
## Flexibility

Travel insurance or trip protection, don't have to worry about health care expenses/ coverage, full cancellation & refunds on transportation and/or accommodations



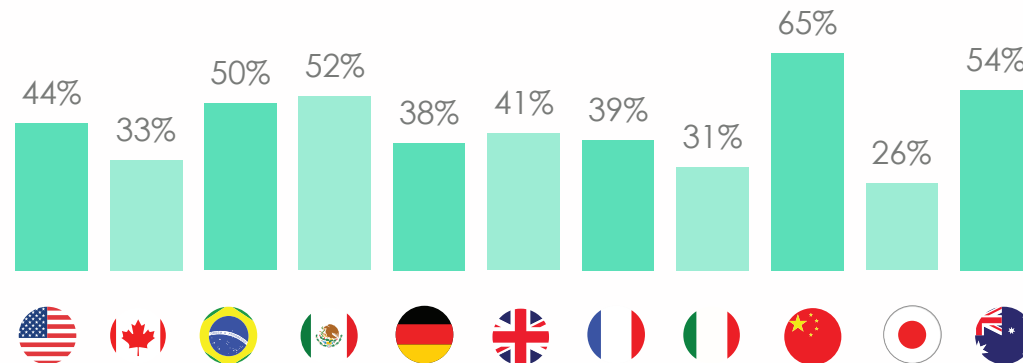
## Health & Safety Measures

Traveling with safety supplies such as mask, disinfectants and sanitizers; accommodations are strictly following CDC guidelines on cleaning & hygiene



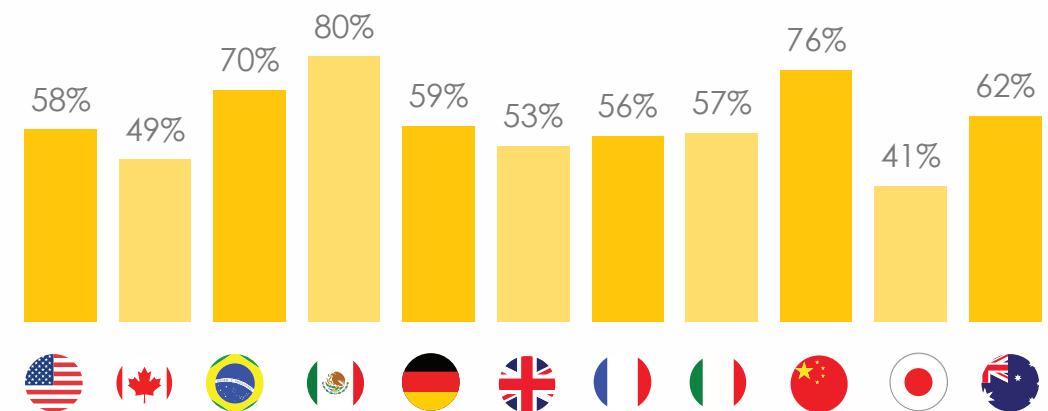
## Busy Destination

Traveling to a destination with lots of tourist activity, traveling to a destination where local establishments are open & there will be things to do



## Quiet Destination

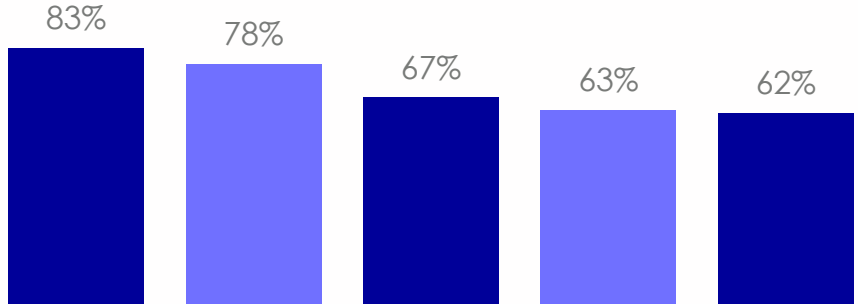
Traveling to a destination where local establishments are following safety protocols & guidelines, the destination is less populated



# Younger generations are more influenced by each of the major factors in deciding to travel in the next year

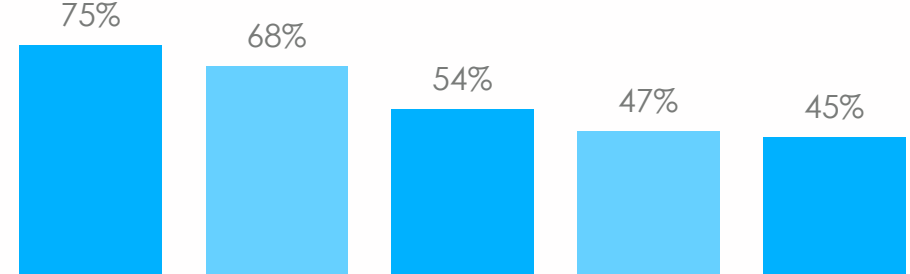
## Flexibility

Travel insurance or trip protection, don't have to worry about health care expenses/ coverage, full cancellation & refunds on transportation and/or accommodations



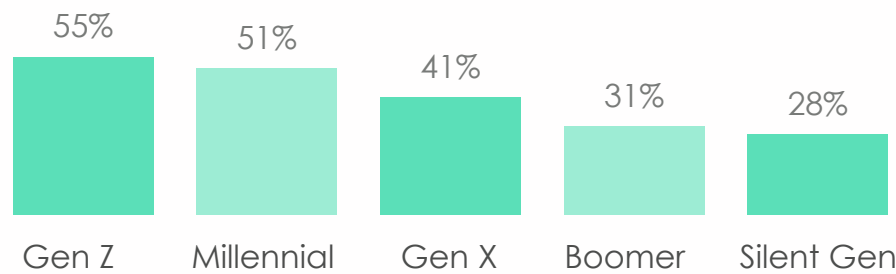
## Health & Safety Measures

Traveling with safety supplies such as mask, disinfectants and sanitizers; accommodations are strictly following CDC guidelines on cleaning & hygiene



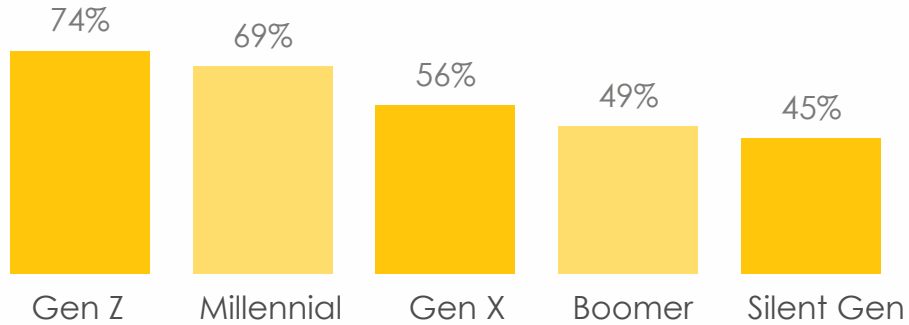
## Busy Destination

Traveling to a destination with lots of tourist activity, traveling to a destination where local establishments are open & there will be things to do



## Quiet Destination

Traveling to a destination where local establishments are following safety protocols & guidelines, the destination is less populated





# 86%

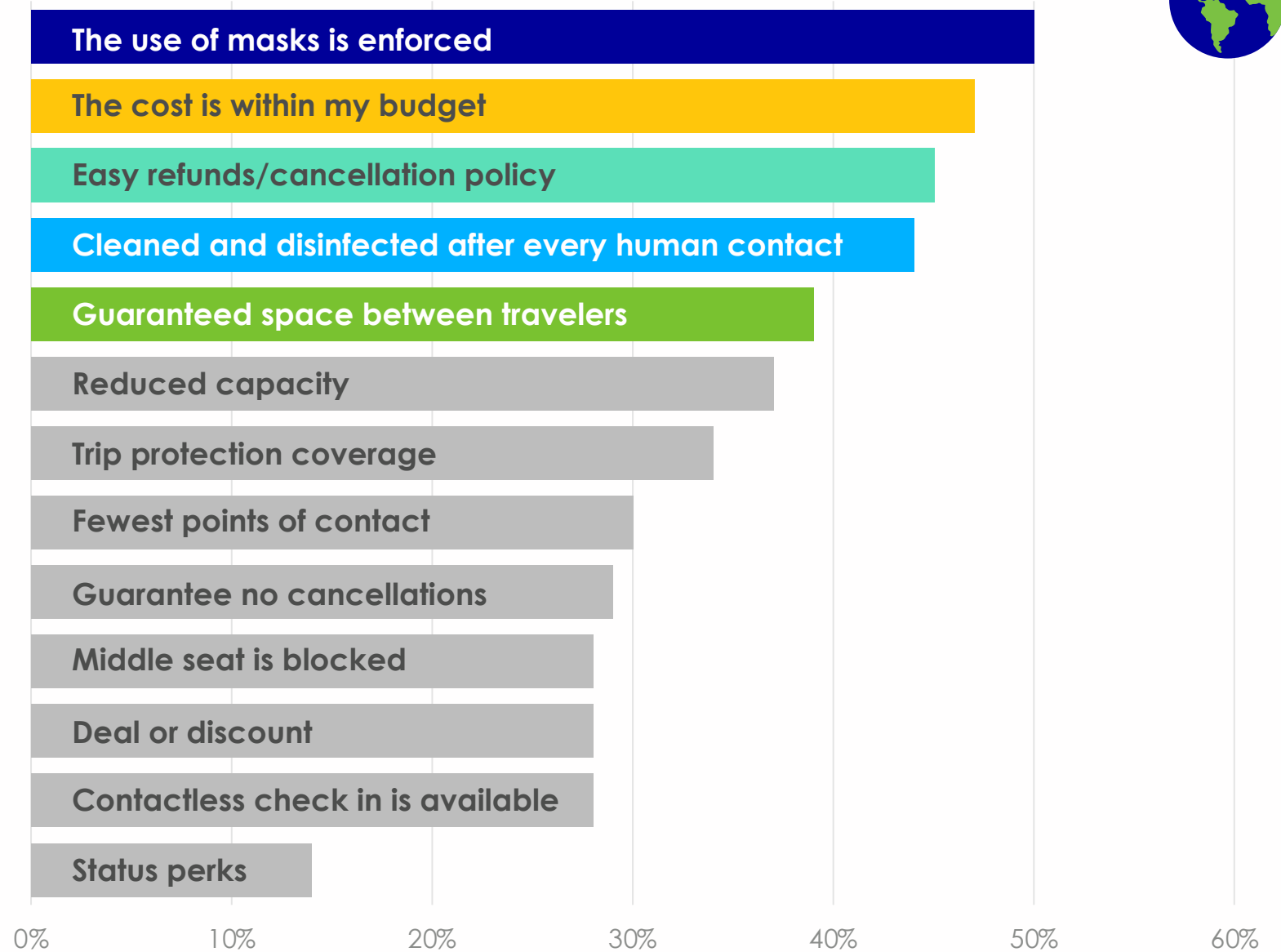
of travelers expect to make transportation decisions for future travel based on implemented pandemic measures, including:

- Cleaning and disinfecting
- Using masks
- Contactless check in
- Physical distancing
- Reduced capacity



# Mask enforcement is a leading factor for travelers globally deciding on transportation for future travel

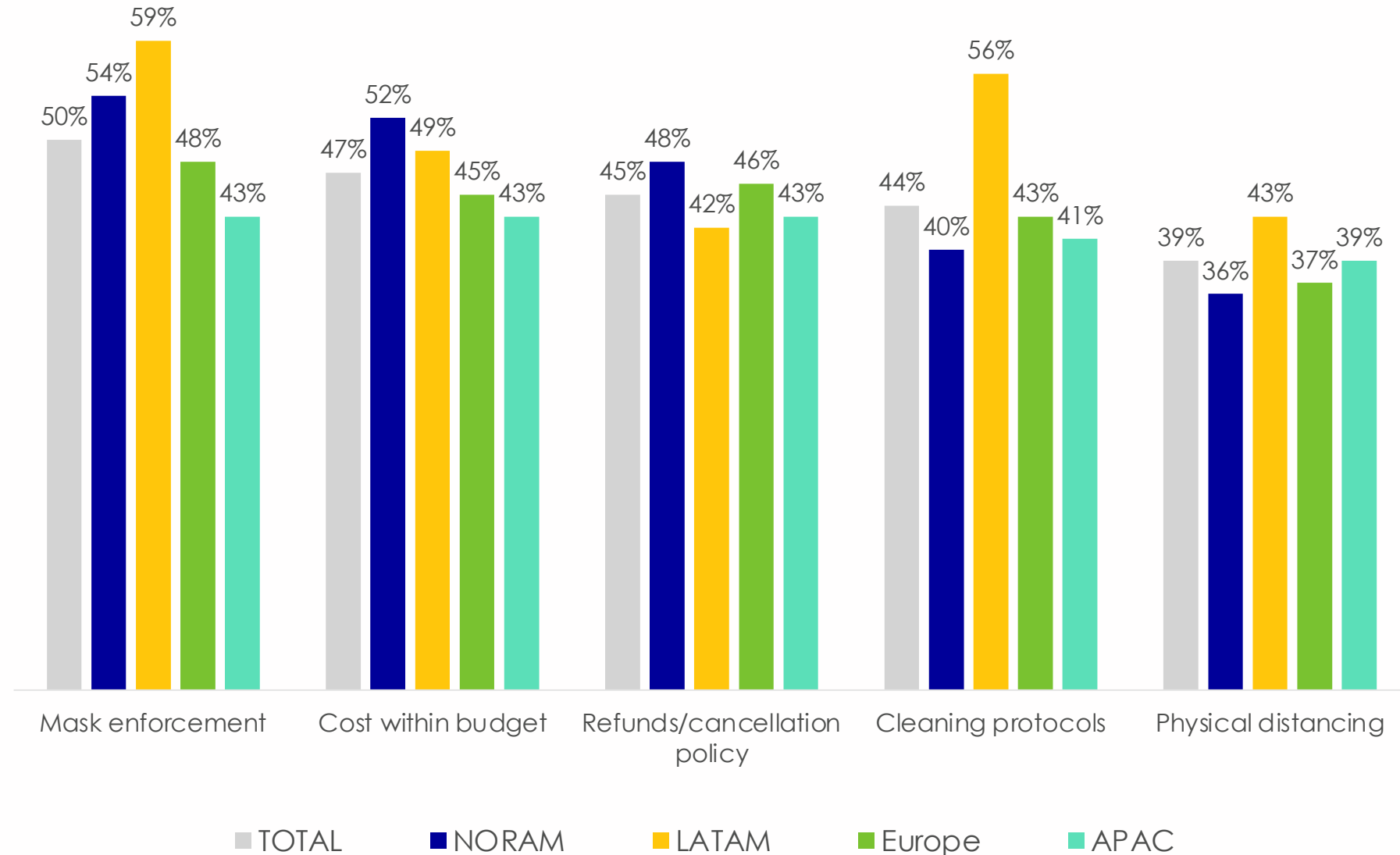
Flexibility and financial considerations closely follow in importance along with cleanliness, hygiene, and distancing measures.



# For the top five transportation considerations in future travel, regional importance varies

Health and hygiene matters most to Latin American travelers.

Cost and flexibility ranks higher for North American travelers.

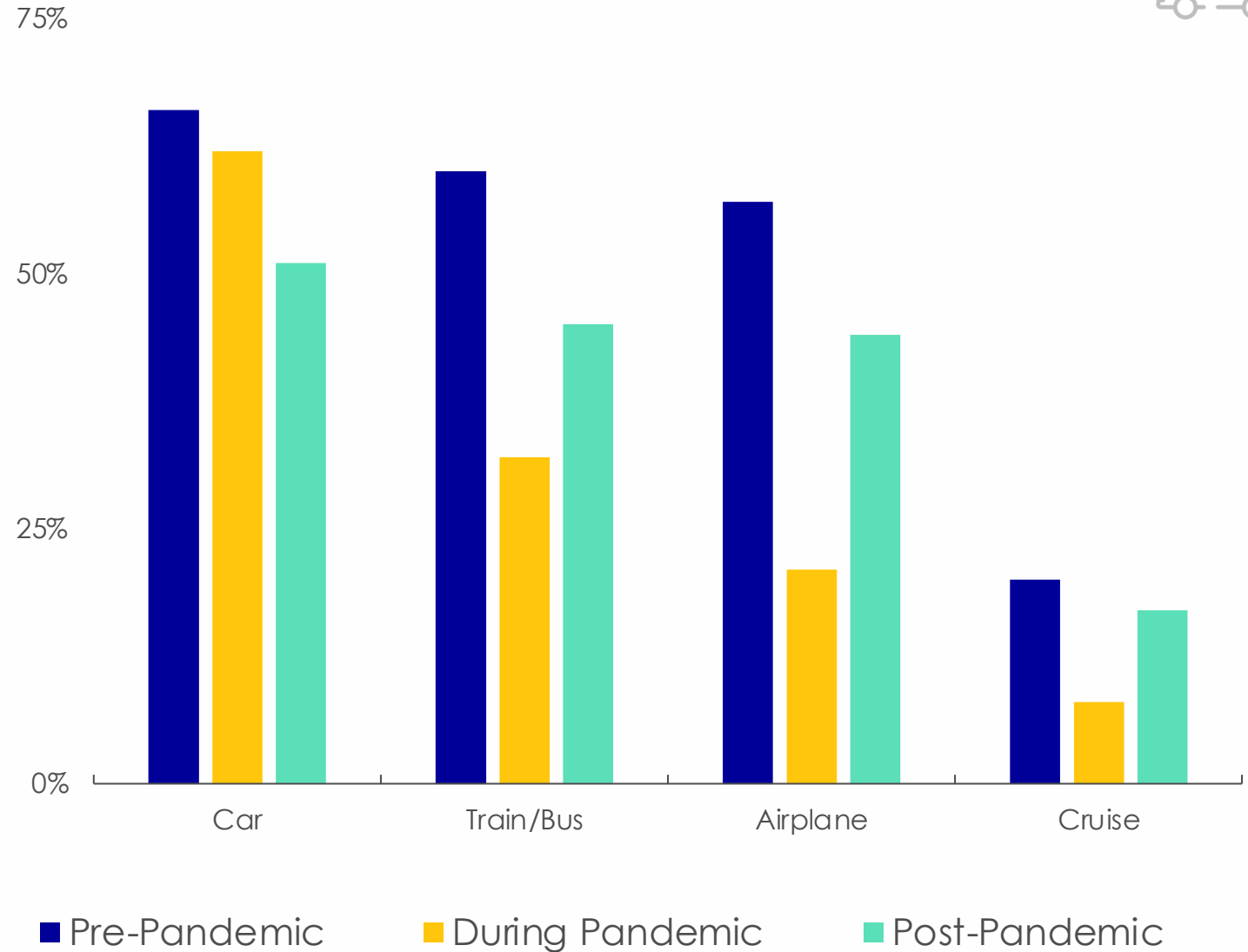




# Car travel remains popular, with other modes returning post-pandemic

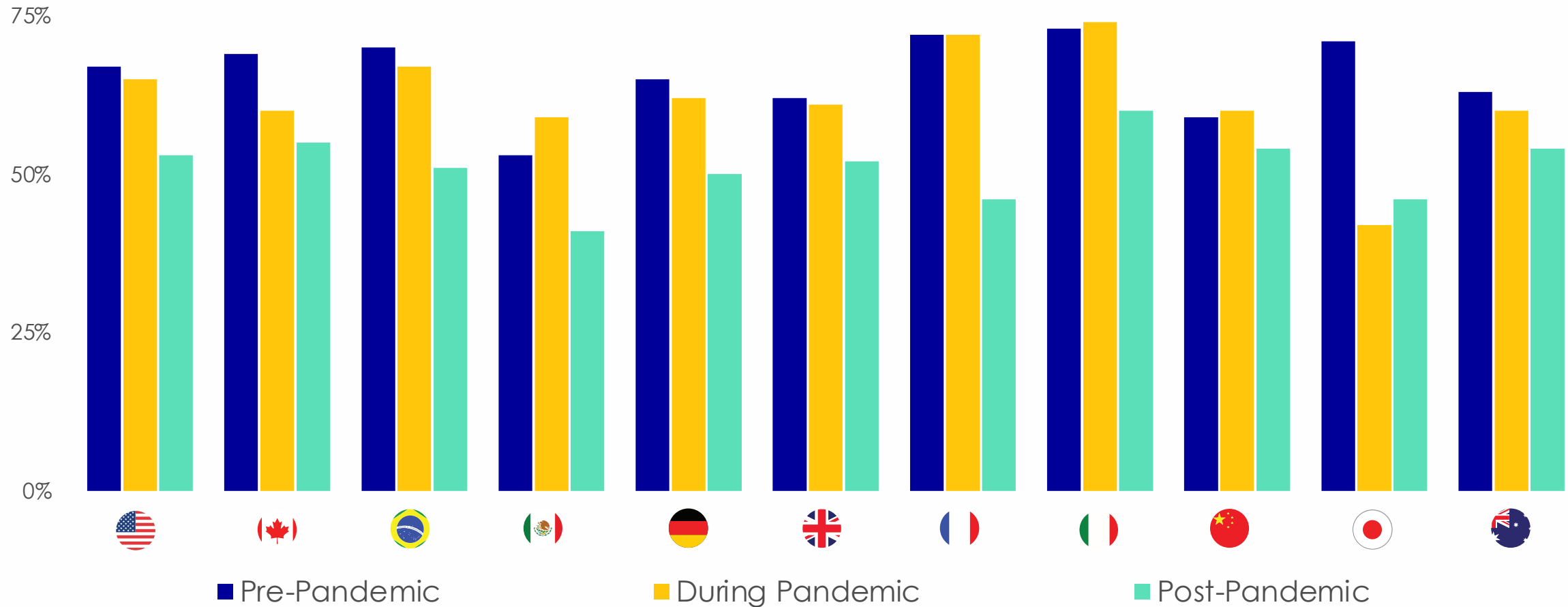
During the pandemic, car travel continues to be nearly as popular as pre-pandemic.

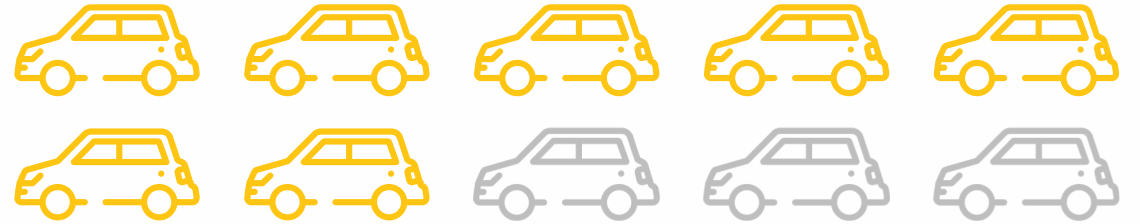
Post-pandemic transportation via train, bus, and air will bounce back, indicating travelers expect to regain confidence.





# Car travel gained popularity during the pandemic in Mexico, Italy, and China



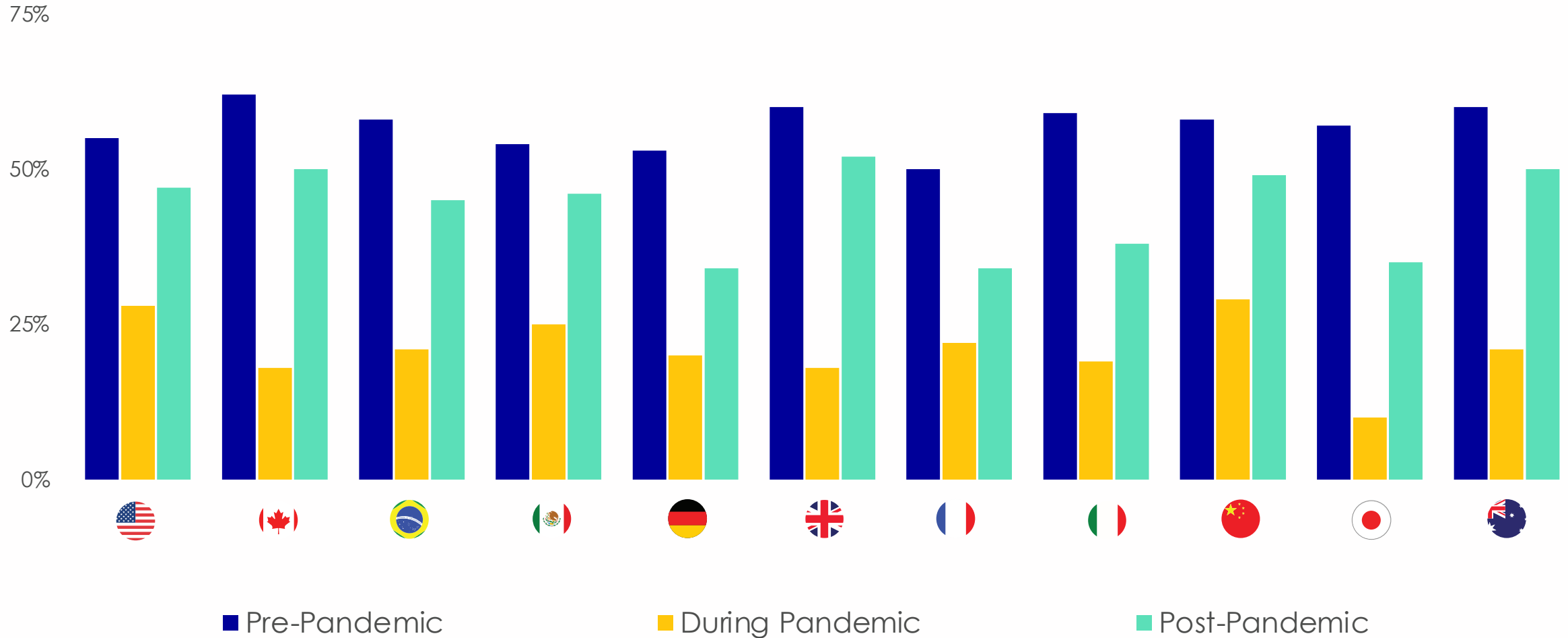


# 7 in 10

travelers are willing to **drive up to 6 hours** for a leisure trip during COVID-19

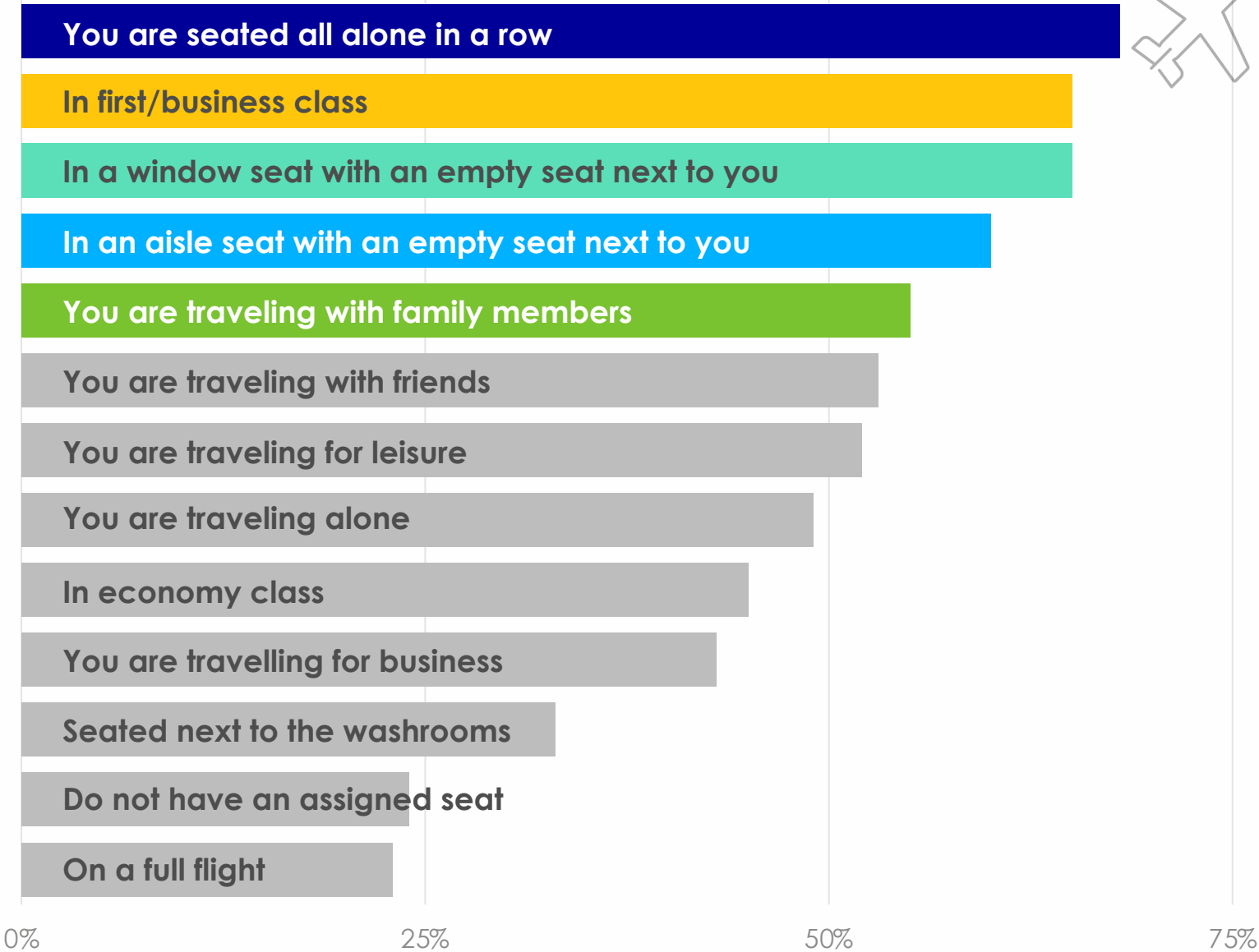


# Travelers in many countries expect to return to air travel at nearly the same level as pre-pandemic





Globally, travelers would be more comfortable booking air travel if they had more room and empty space around their seat



# 6 in 10 travelers

would be most comfortable with air travel if social distancing measures are in place



Seated alone in a row



Seated in window seat with an empty adjacent seat



Seated in first/business class



Seated in aisle seat with an empty adjacent seat





# 8 in 10

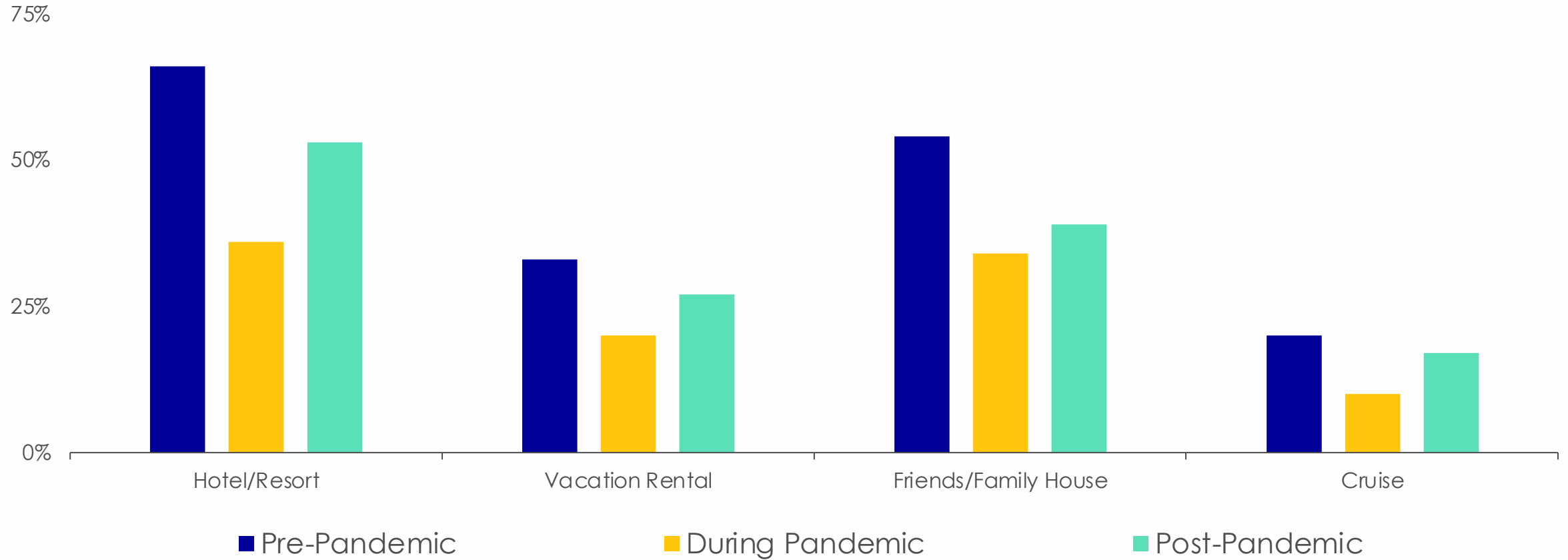
travelers expect to make accommodation decisions based on implemented pandemic measures, including:

- COVID-19 hygiene protocols
- Strict use & enforcement of masks
- Reduced capacity
- Contactless check in, room service, and takeout



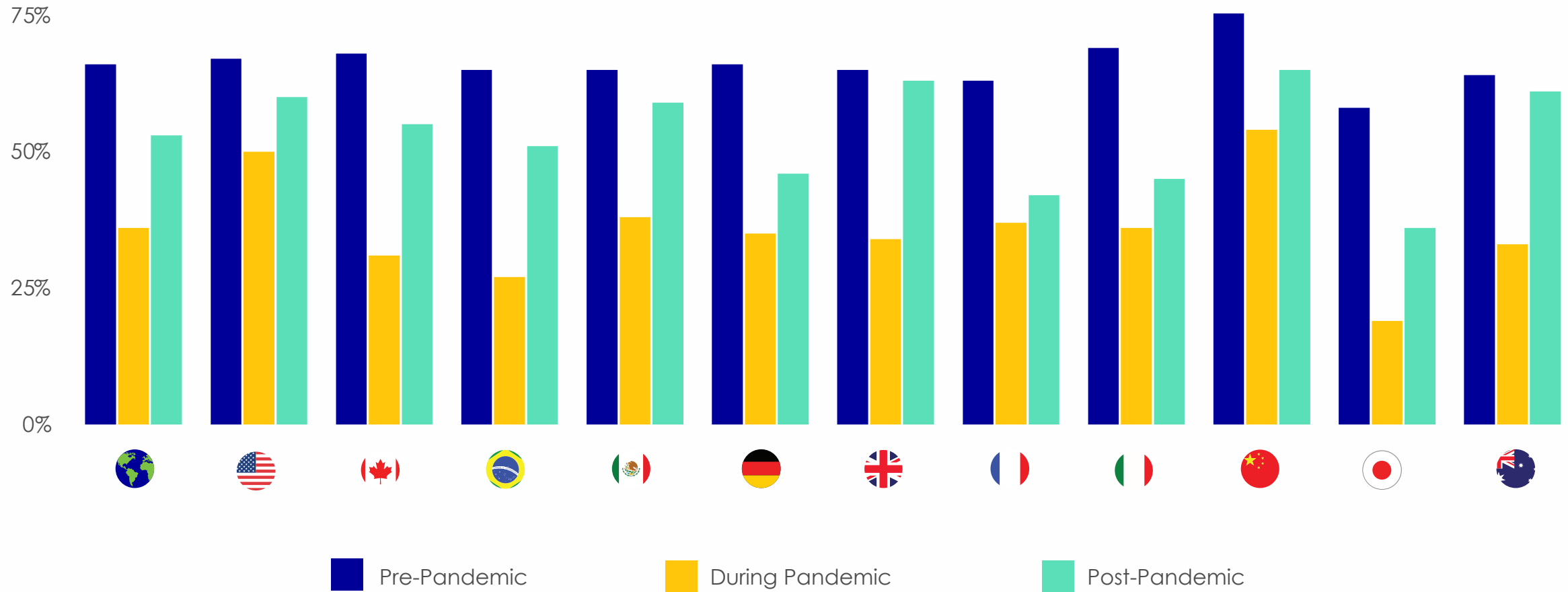


# Travelers are looking to return to trusted accommodations post-pandemic



# In many countries, hotels and resorts could bounce back to nearly pre-pandemic levels

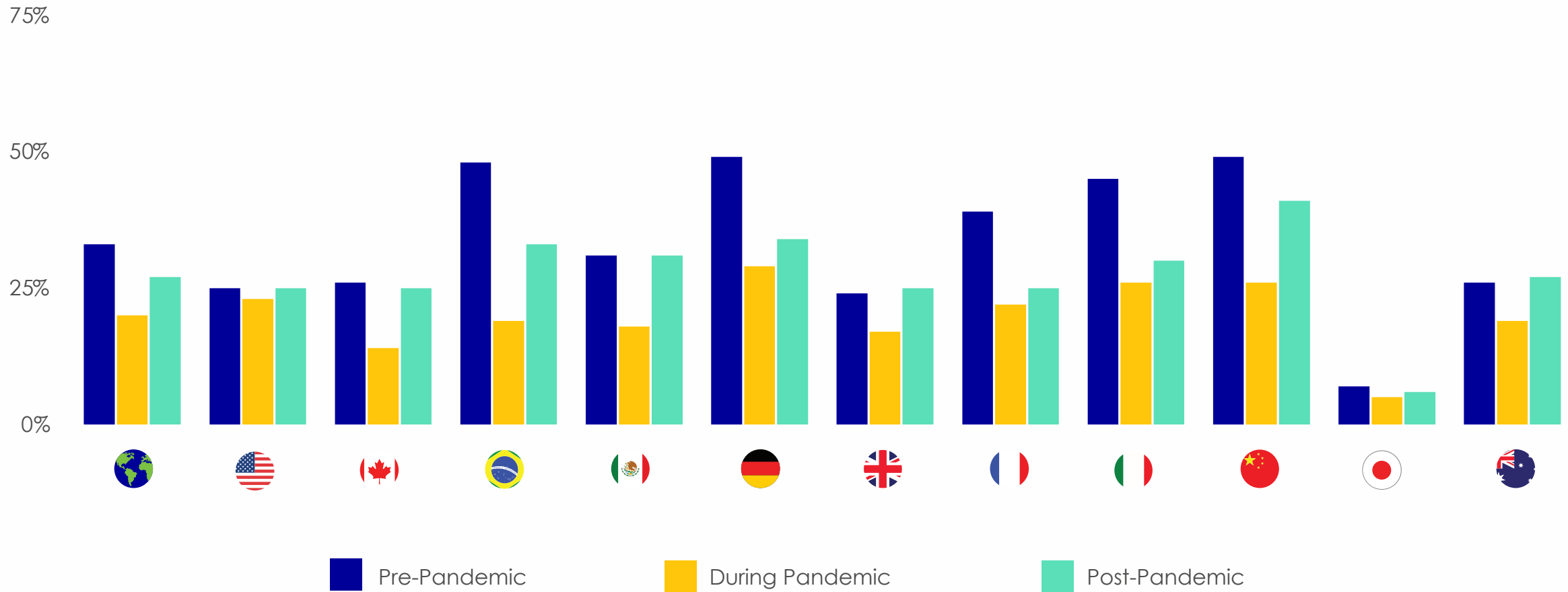
Accommodation Usage | **Hotels & Resorts**





# Travelers in most countries expect to continue choosing vacation rentals post-pandemic

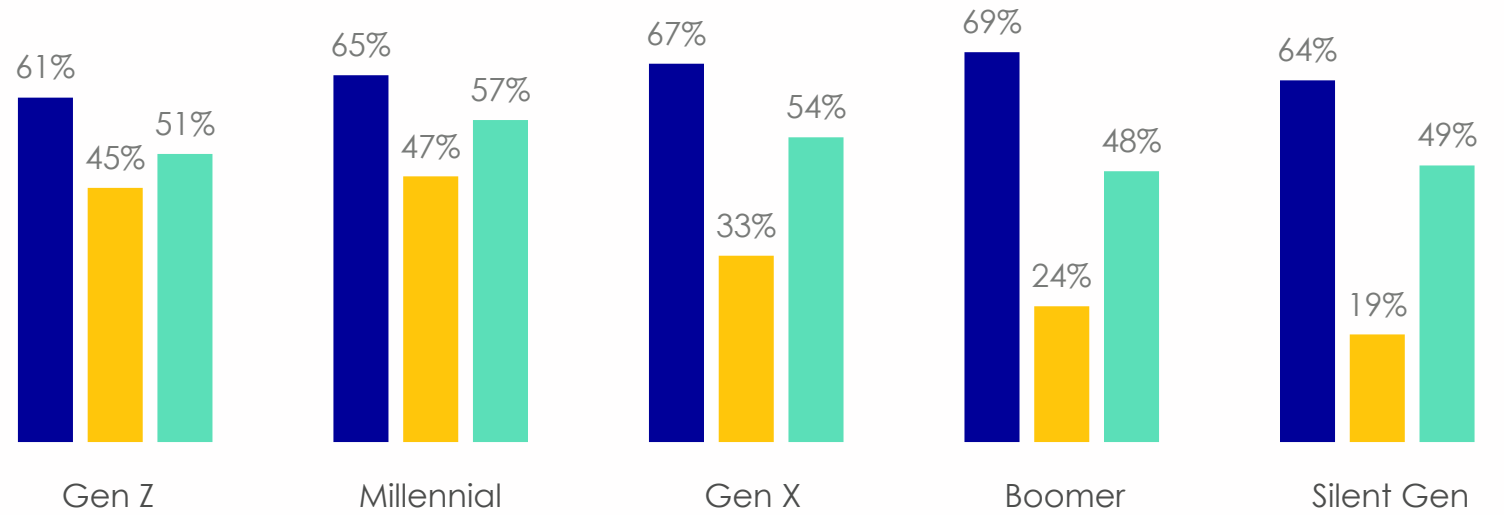
Accommodation Usage | **Vacation Rentals**



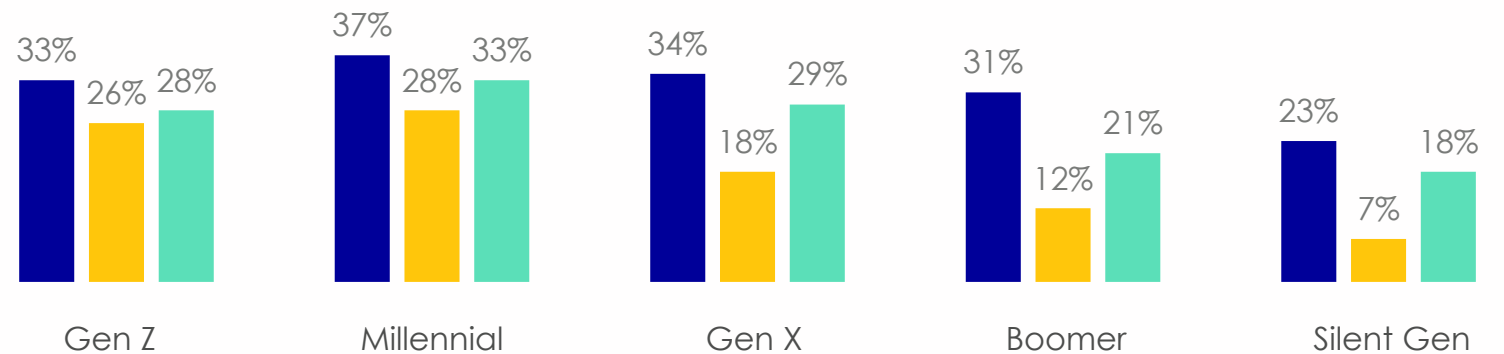
# Younger generations could be at the forefront of driving accommodation demand back to pre-pandemic levels

Post-pandemic vacation rentals will bounce back with similar volumes as before COVID-19.

## Hotel & Resorts | Leisure Travel



## Vacation Rentals | Leisure Travel



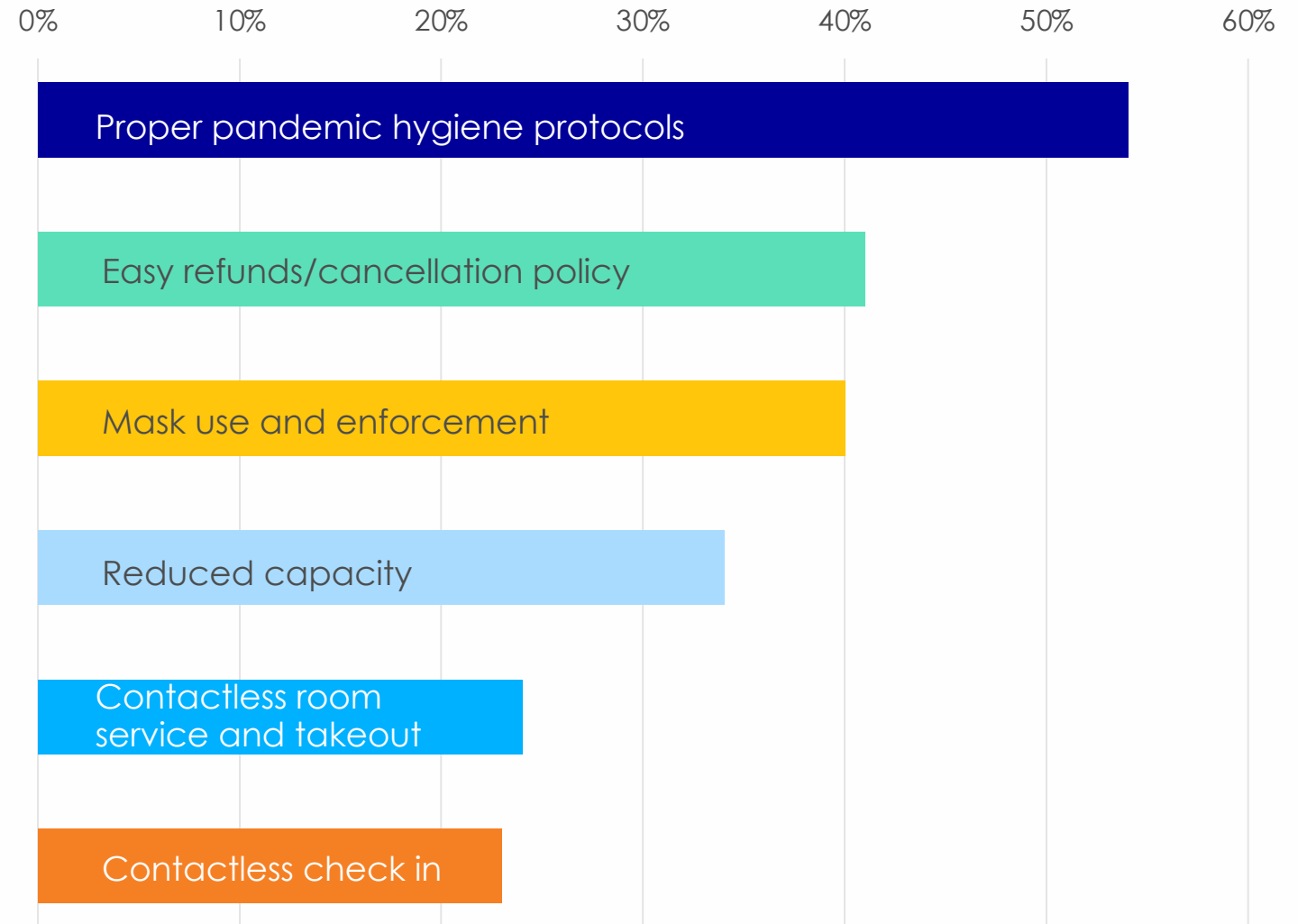
■ Pre-Pandemic    
 ■ During Pandemic    
 ■ Post Pandemic



## Accommodation Considerations | Global

# Proper hygiene protocols will likely inform future accommodation decisions

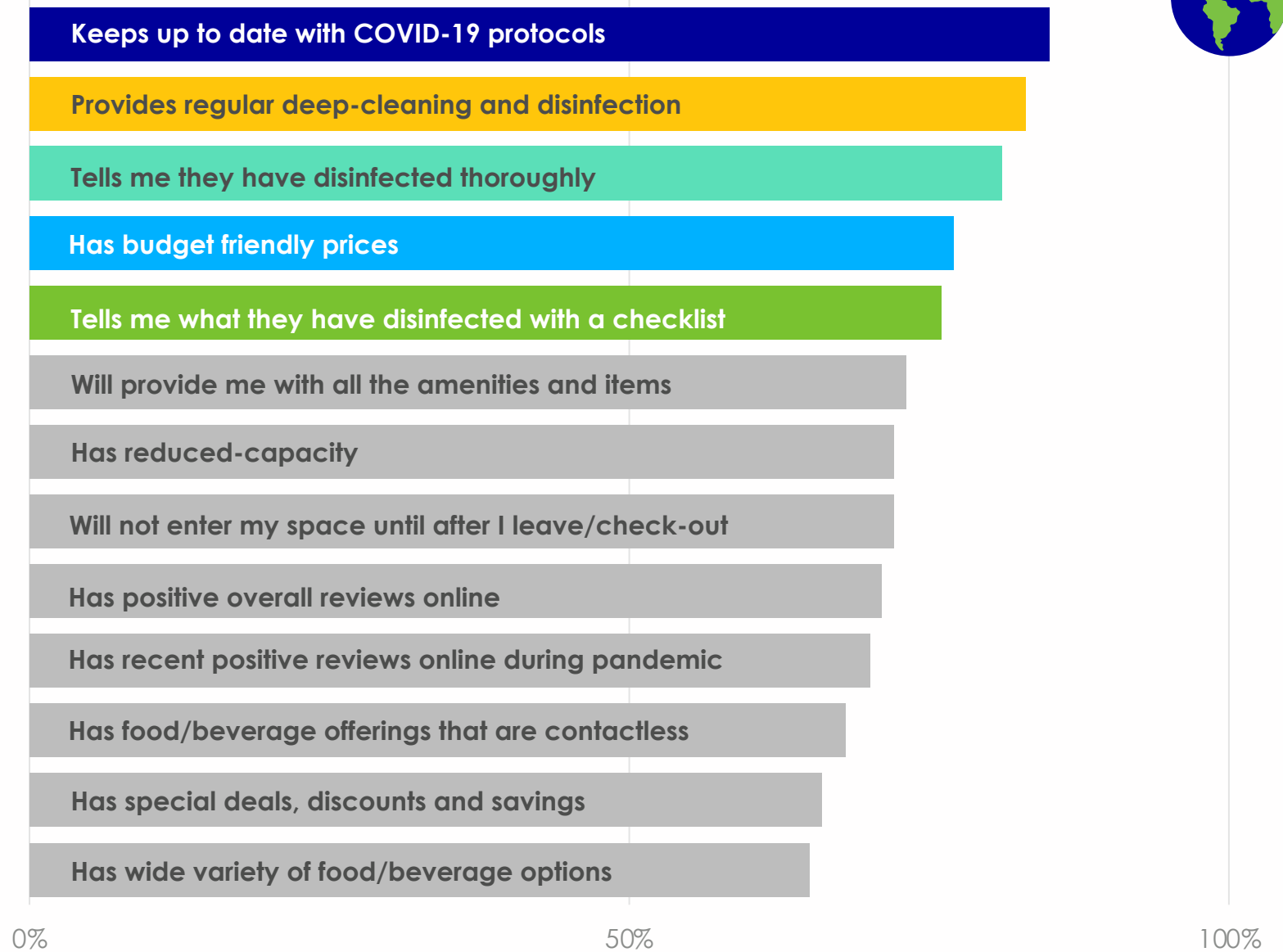
Followed closely by flexibility and financial considerations





# Accommodation providers can reassure travelers with specific information on current pandemic measures taken

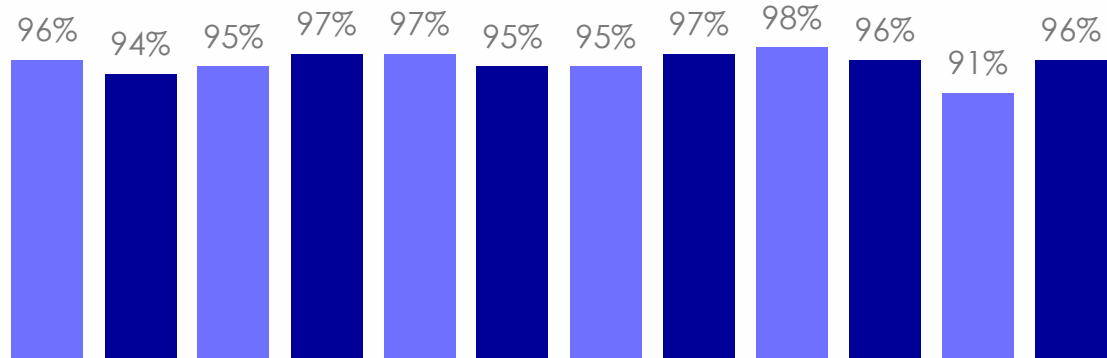
Pre-empt concerns by implementing pandemic protocols and communicating those clearly.



# Implementing and communicating health and safety measures are a must for accommodation providers

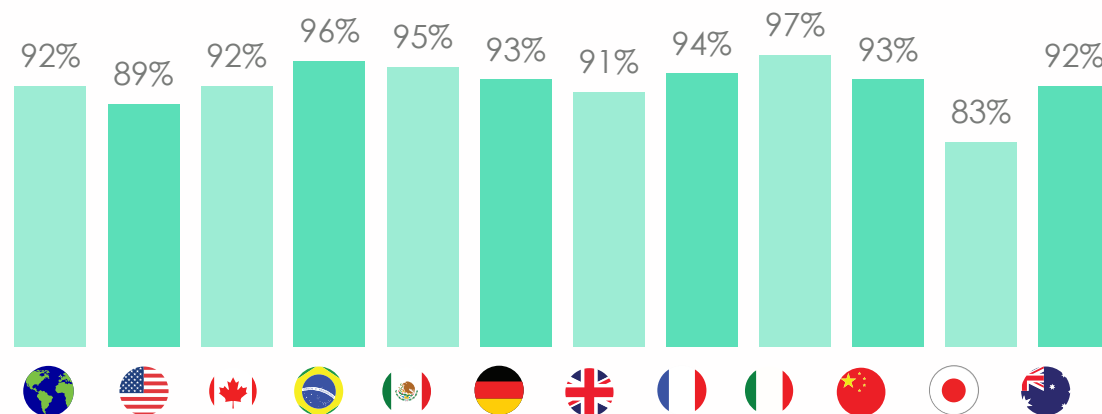
## Health & Safety Measures

Has reduced-capacity + Has contactless check-in and services + Will not enter my space until after I leave/check-out + Requests that I bring all amenities and items (linens, towels, etc.)



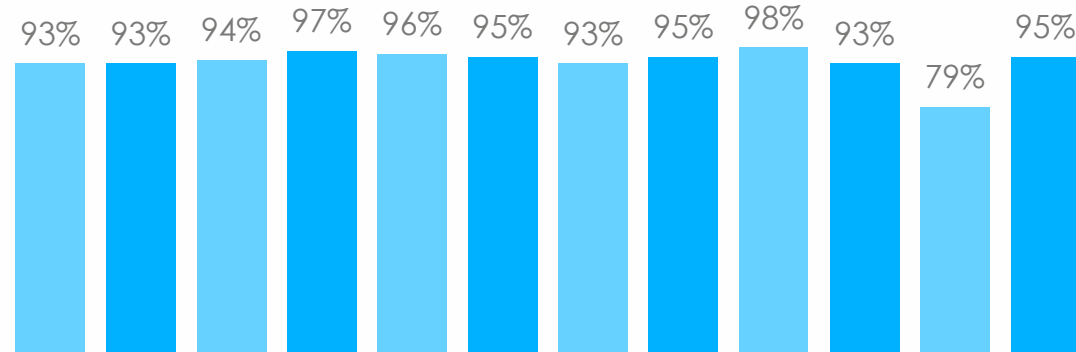
## Cleaning Measures

Tells me what they have disinfected with a checklist + Provides regular deep-cleaning and disinfection while I am there + Tells me they have disinfected thoroughly



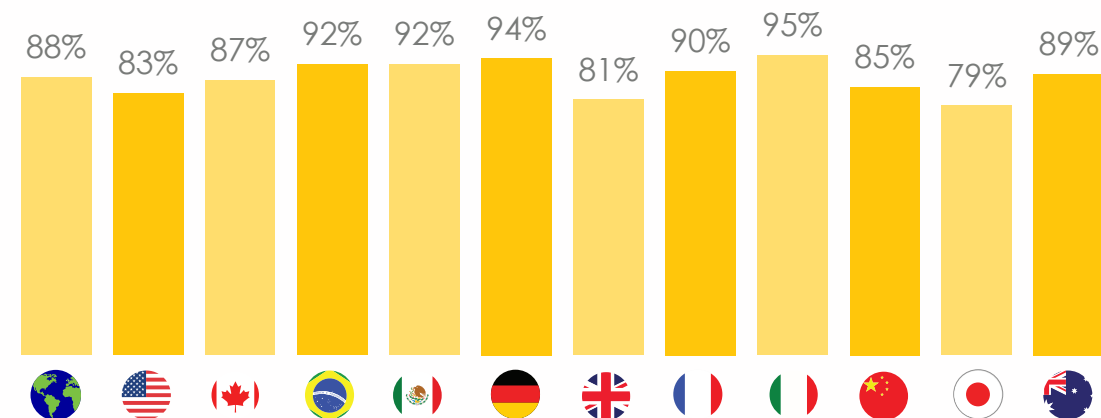
## Amenities & Accessibility

Will provide me with all the amenities and items (linens, towels, etc.) + Has lots of great activities my family could participate in, on-site + Has an on-site bar or restaurant that is open + Is at/nearing capacity and lively + Has no contact restrictions



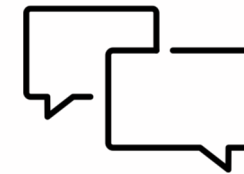
## Finances

Has special deals, discounts and savings + Has budget friendly prices + Has nominal cleaning surcharges, added to the final bill





1 / 3

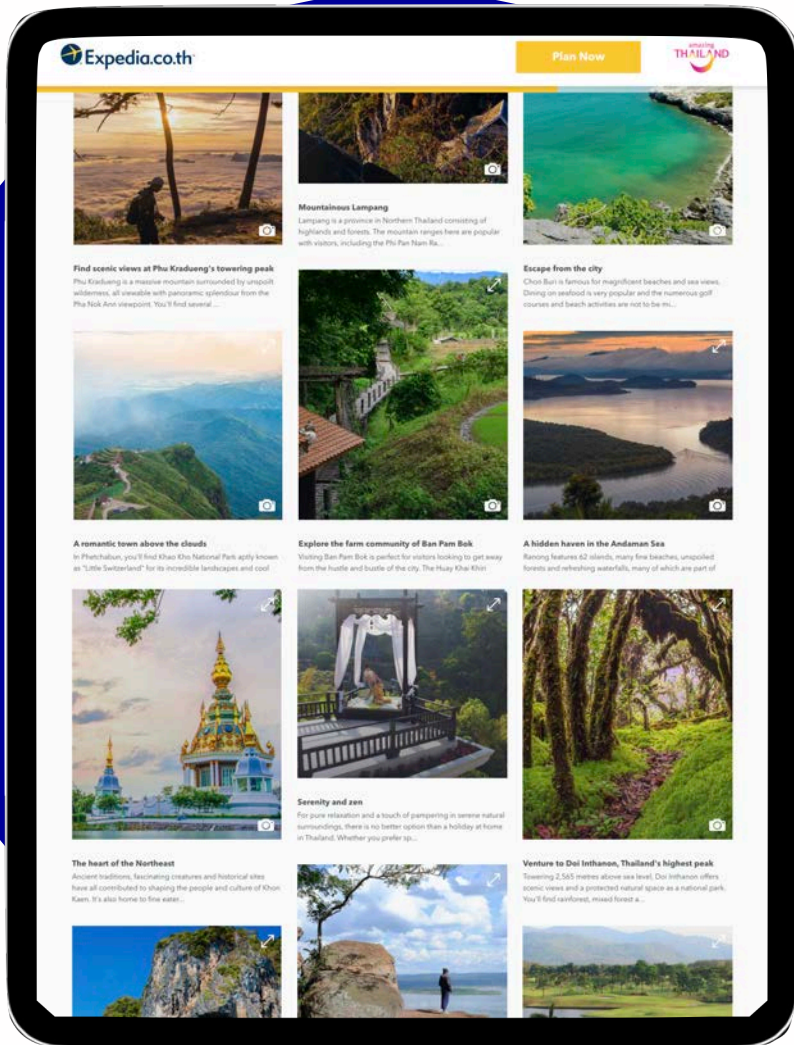


of travelers want to see destination messaging around social distancing measures or protocols and cleanliness standards

# Messaging on health, safety, and hygiene will play a bigger role in future destination decisions

Across the board travelers want more information about the destinations they are considering visiting.





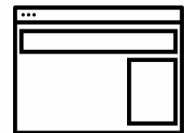
Travelers are increasingly turning to online travel sources for trip planning - more than pre-pandemic



**24% more**  
Online Travel Agencies (OTAs)



**20% more**  
Destination Sites



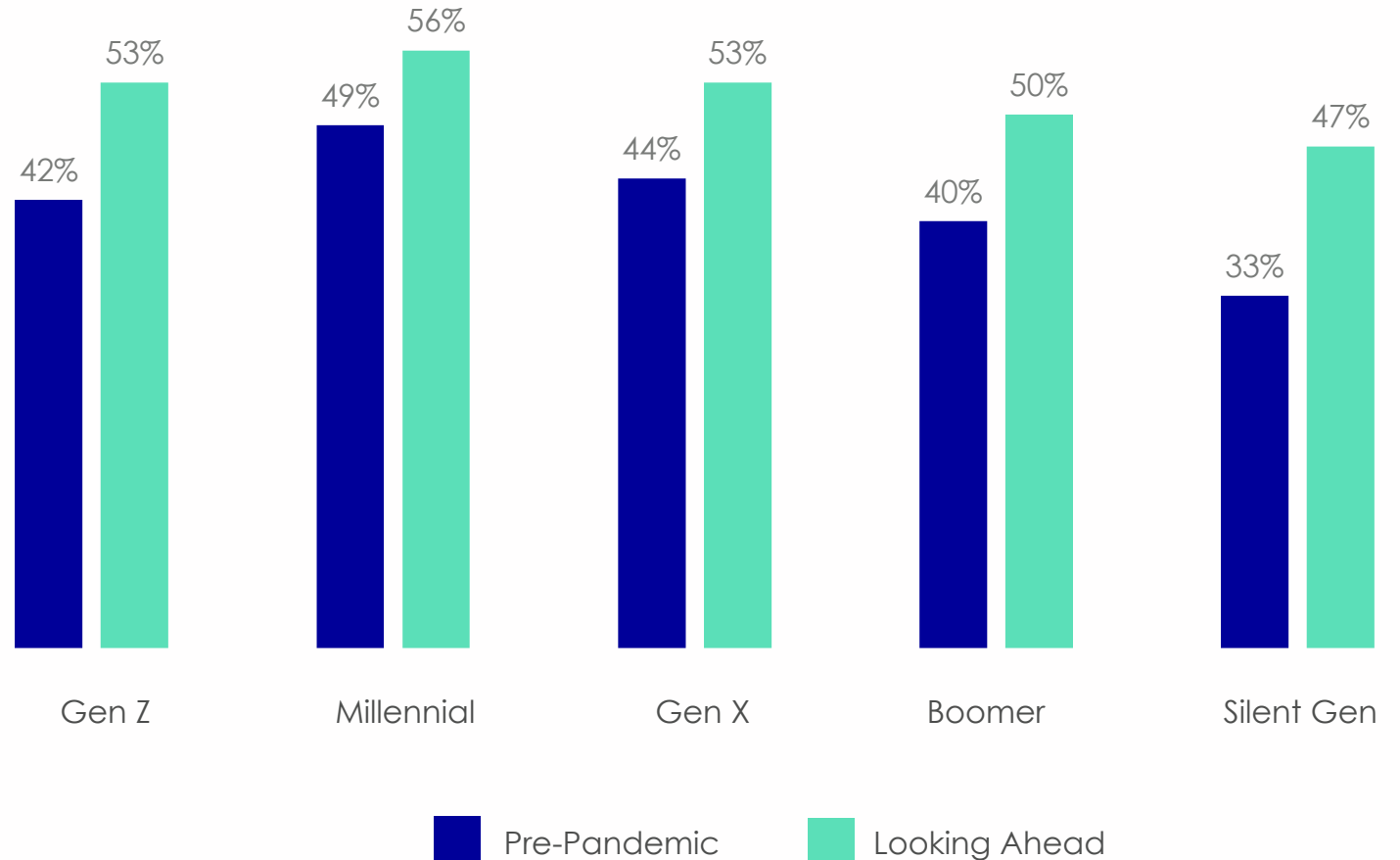
**16% more**  
Travel Advertising



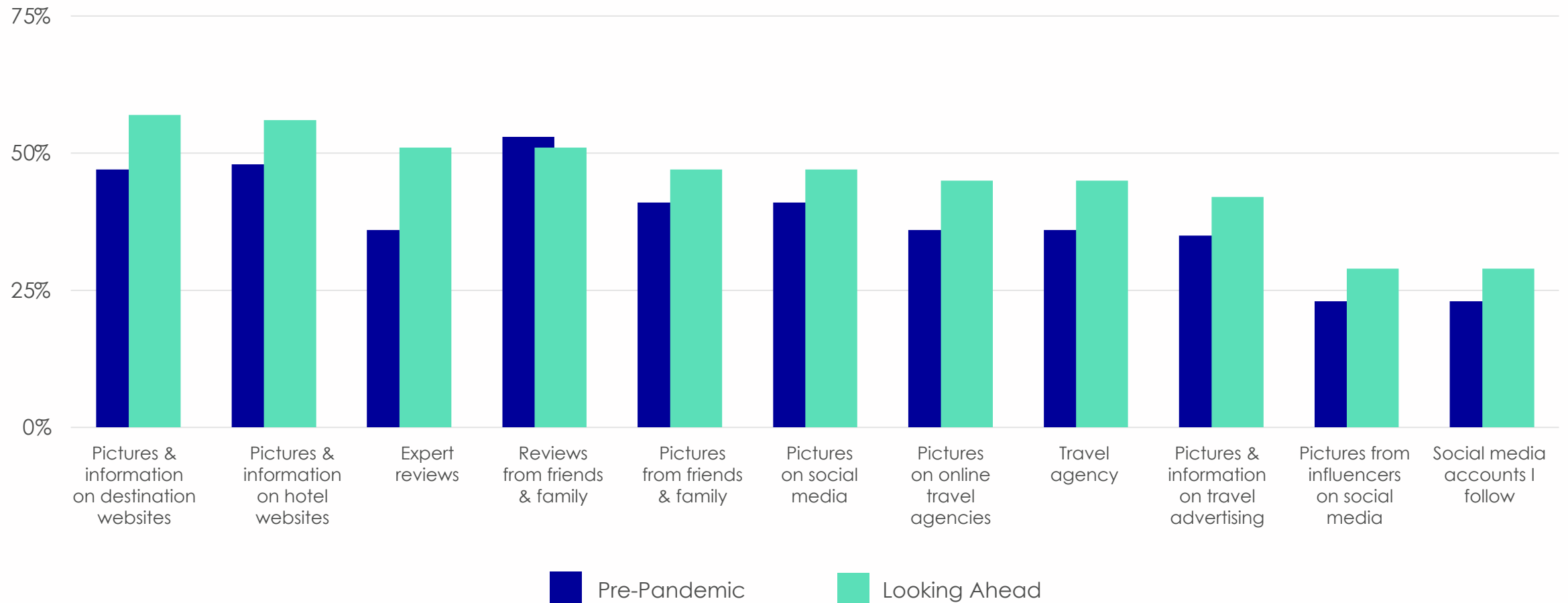
# All generations expect to increasingly look to news sources for travel information

Millennials rely on news and media more than any other generation, pre-pandemic and looking ahead.

### Influence of News Pre-Pandemic & Looking Ahead

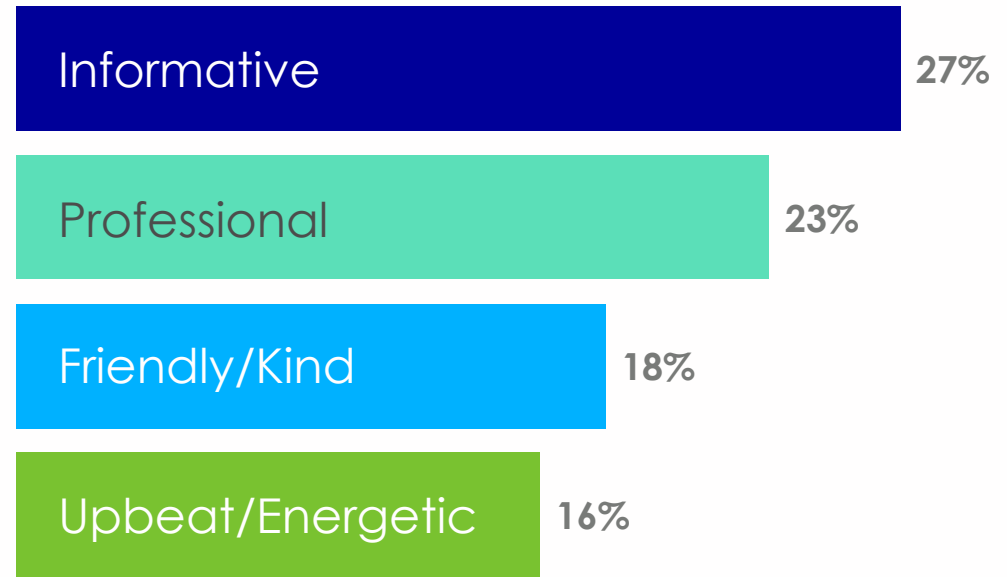


# Pictures, information, and reviews are especially relevant looking ahead





# Travelers want brands to take an informative and professional tone

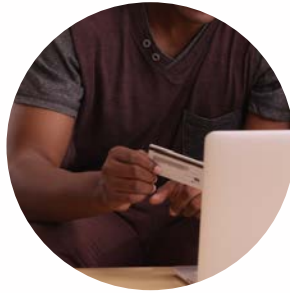


## Turning Insights Into Action



### Rejuvenate & Recharge

Inspire travelers who are still dreaming and engage those who may be ready to travel with content and messaging highlighting rest and relaxation.



### Hygiene & Flexibility

Information on hygiene measures and pandemic protocols should be at the forefront of brand communications, supported by reservation flexibility or full refunds to provide travelers with peace of mind.



### Reassuring Content

Use multiple channels—including news media, travel sites and advertising—to share reassuring content, such as messaging and imagery on social distancing, reduced capacity, contactless services, mask use, and hygiene measures.

# Looking Ahead

Find more on our data, insights, and solutions to help partners on the path to recovery:  
<https://bit.ly/recoverymarketing>



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THANK YOU

