

Traveler Sentiment & Influences: How Consumers Feel About Travel Now

Given the rapidly evolving state of travel around the world, stakeholders are struggling to stay informed and ahead of emerging consumer behavior and trends.

Expedia has been tourism stakeholders understand and navigate shifting travel shopper behaviors and identify areas of opportunity to reach customers. One way they've assisted stakeholders stay informed is via data and insights; by combining Expedia's traveler intent and demand data they've been able to release reports.

Expedia in partnership with **Northstar Research Partners**, engaged 11,000 people across 11 countries: Australia, Brazil, Canada, China, France, Germany, Italy, Japan, Mexico, the UK, and the U.S. To examine how the pandemic has impacted travel attitudes and shopping behaviors. It has also helped us understand how travel shoppers are making destination, transportation, and accommodation decisions. The report **Traveler Sentiment & Influences study**.

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
- United States (US)
- Canada (CA)
- Brazil (BR)
- Mexico (MX)
- Germany (DE)
- United Kingdom (UK)
- France (FR)
- Italy (IT)
- China (CN)
- 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)

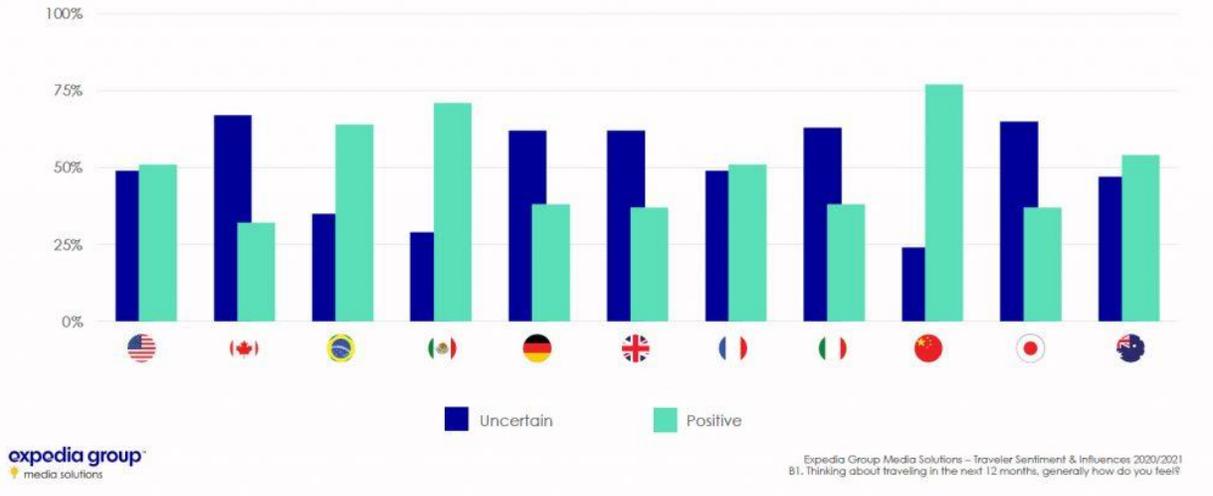
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The research revealed some good news: Though consumer confidence in travel varies by country and generation, 1 in 2 travelers feel optimistic—comfortable or even excited—about taking a trip in the next 12 months. The importance of hygiene measures, flexibility, and financial peace of mind is more universal: seventy five percent of travelers said measures such as mask enforcement, reduced capacity or contactless services, and flexibility (like easy refunds or cancellation policies), will inform where they stay on their next trip.

Key Insights and Marketing Takeaways

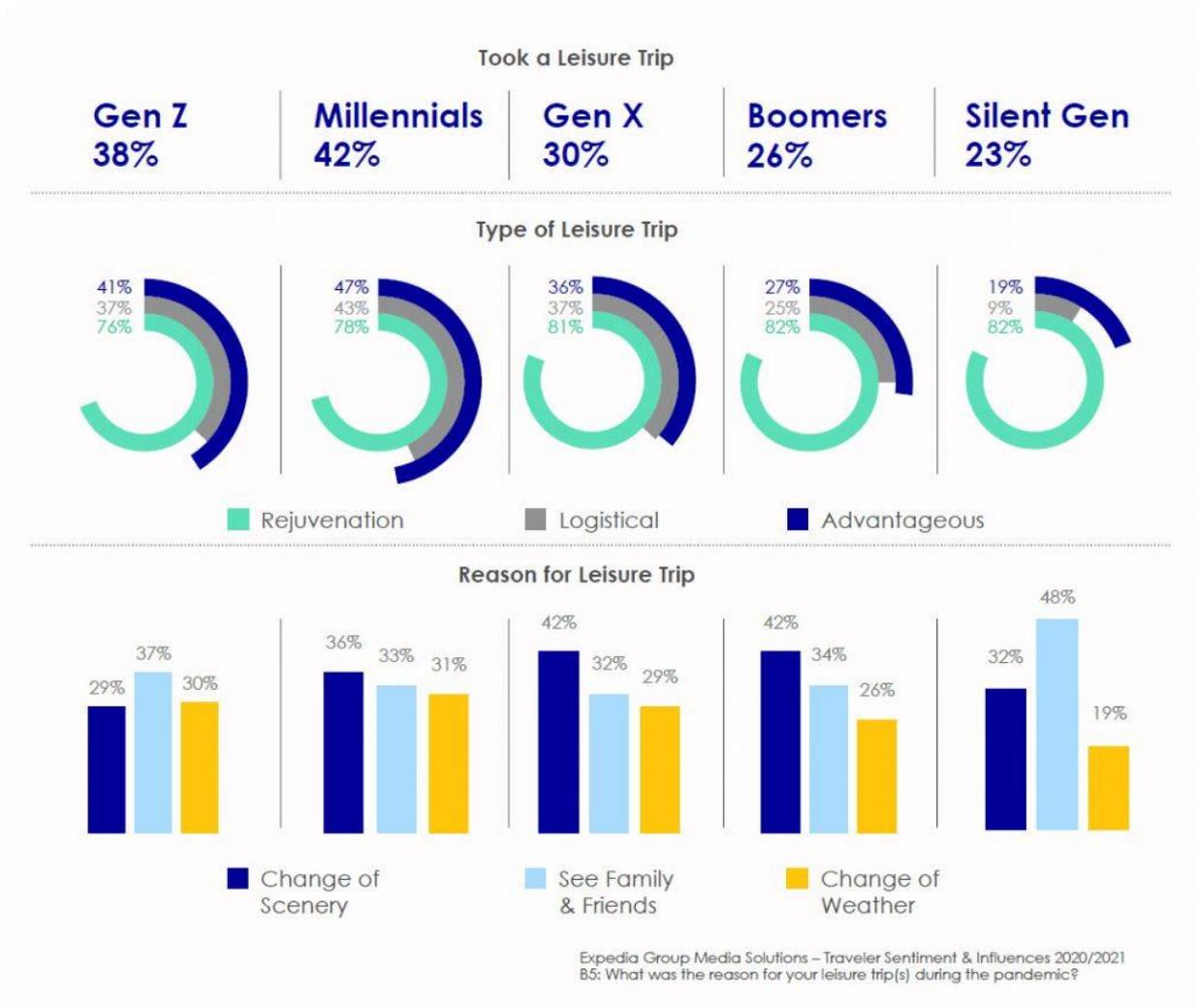
Brazilian, Chinese, and Mexican travelers feel more positive about traveling in the next 12 months

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



Looking Back: Travel Impact

Globally, two-thirds of travelers cancelled a planned trip due to COVID-19 and only 33% of travelers have taken a trip during the pandemic. Of those who took a trip, 8 in 10 traveled for rejuvenation—which the study defined as seeking a change of scenery or different weather, seeing family or friends, or celebrating an event.

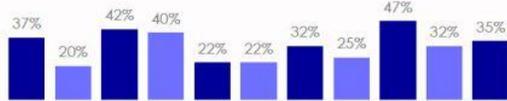


Looking Ahead: the Next 12 Months

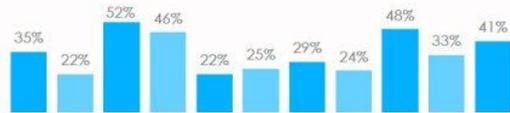
Around the world, travelers said that they are more likely to take trips between April and September 2021. Brazilian, Chinese, and Mexican travelers show a higher likelihood to travel even earlier—between January and March 2021. Gen Z and Millennial travelers are 1.5x more likely than other generations to take a leisure trip by Q1.

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

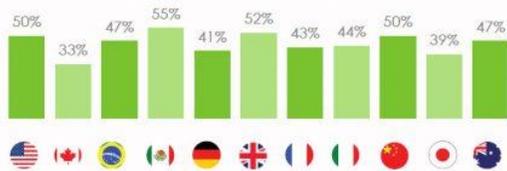
Q4 2020



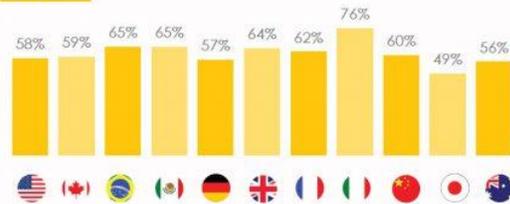
Q1 2021



Q2 2021



Q3 2021



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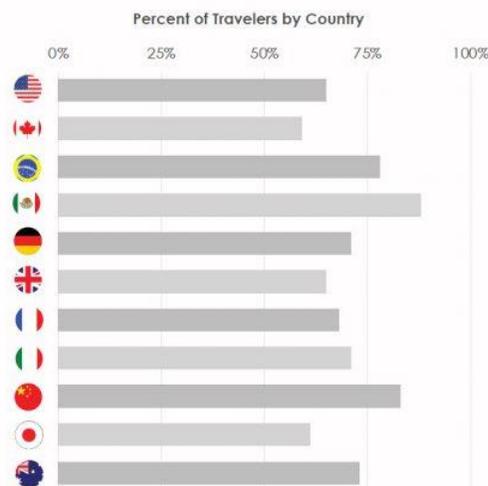
Expedia Group Media Solutions – Traveler Sentiment & Influences 2020/2021
C1. How many trips are you likely to go on in the next 12 months?

75% of travelers said they would be comfortable traveling if a vaccine is widely available, which is promising given that this sentiment was captured in October, prior to **November and December's positive vaccine news**. 70% of travelers want added flexibility, such as travel insurance and trip protection, full cancellations, and refunds on transportation and accommodations. Expedia.com's lodging data shows that travelers booked refundable rates 10% more often in 2020 than the year before—the research indicates this trend is likely here to stay.

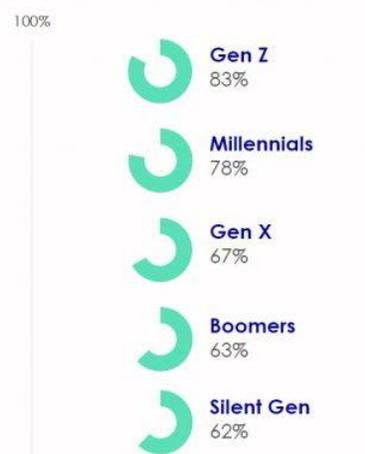
Flexibility is especially important to younger generations and to Latin American and Chinese travelers

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 Generation

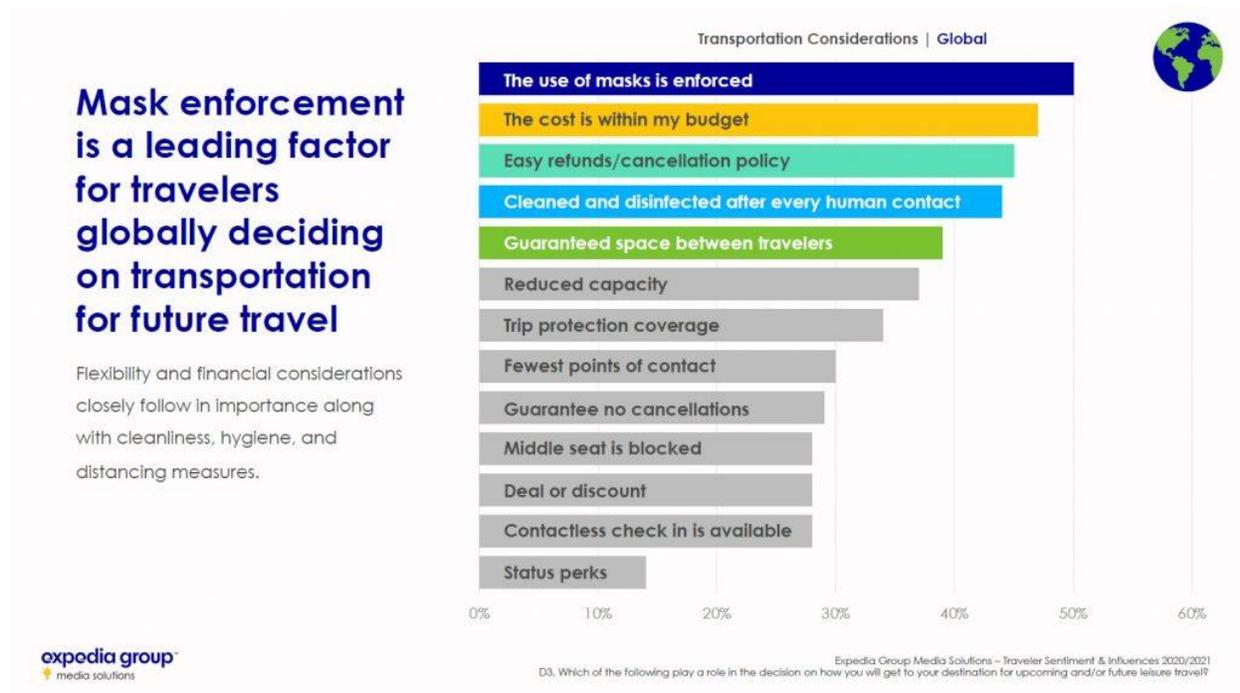


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Expedia Group Media Solutions – Traveler Sentiment & Influences 2020/2021
C4. How comfortable are you to travel for leisure in the next 12 months if...

Transportation & Accommodation Priorities

Travelers also want reassurances that travel providers are following and enforcing pandemic protocols. Mask use and enforcement (50%), cost (47%), and easy refunds or cancellation policies (45%) will be the leading factors in future transportation decisions, though the importance placed on each varies by mode of transportation. For future air travel, 60% of travelers would be most comfortable traveling if social distancing measures are in place.



Travelers will return to trusted accommodations like hotels, resorts, and vacation rentals post-pandemic, and younger generations will be at the forefront of driving demand.



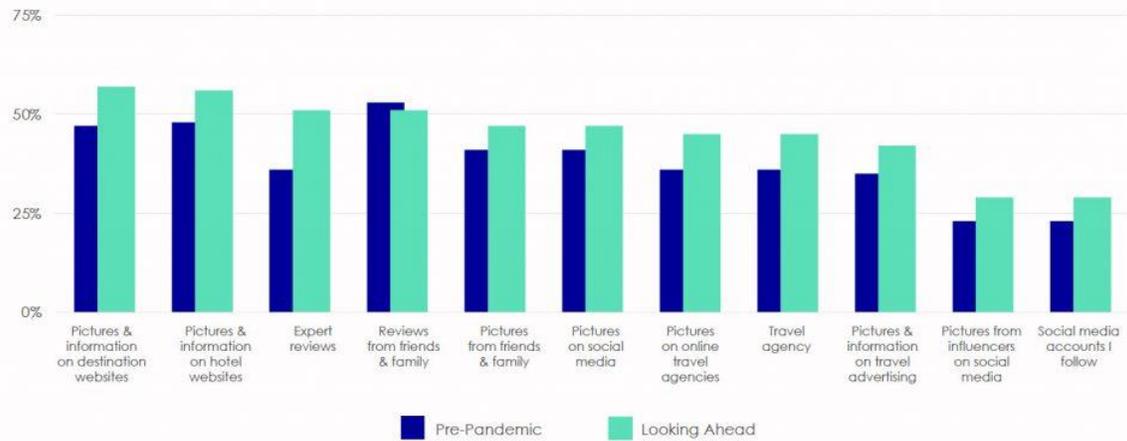
Expedia Group Media Solutions – Traveler Sentiment & Influences 2020/2021
 E1. What types of accommodations you may have used for leisure travel...

Travel Resources & Influences

Travelers are turning to online travel agencies for information and travel planning 24% more than pre-pandemic, while destination websites saw a 20% increase in use as a planning tool. All generations expect to increasingly look to news sources and media for travel information, however, post-pandemic, the Silent Generation will get travel information from news sources 42% more than pre-pandemic.

Pictures and informative messaging in travel advertising are 20% more influential than pre-pandemic, along with travel organizations and experts. This reflects a shift in traveler priorities—with hygiene measures and flexibility overtaking experiences and activities—and the increased importance of credible, up-to-date information from trusted sources.

Pictures, information, and reviews are especially relevant looking ahead



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F3. When thinking about planning leisure travel in the next 12 months, which, if any, of the following influence you? Do these differ from before the pandemic and now?

<https://www.unwto.org/impact-assessment-of-the-covid-19-outbreak-on-international-tourism>