

JANUARY 2023



A WORLD IN MOTION

Shifting consumer travel
trends in 2022 and beyond



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Trip.com Group™

Deloitte.

This report is the story of recovery. After the deepest crisis the sector has faced, Travel & Tourism is trending upwards. It has been a delight to witness – and we have greatly admired the agility, determination and vision that many travel providers have shown in getting our sector back on its feet. Not only has tourism recovered at extraordinary speed, but companies are also working hard to transform the sector and win back travellers with new products, technologies and investments in sustainability.

In 2019, Travel & Tourism contributed 10.3% of global GDP and supported 1 in 10 jobs. As the COVID-19 pandemic hit, the sector shrank by 50.4% in 2020, resulting in a loss of 62 million jobs. However, 2021 witnessed the beginning of recovery for the sector as its total contribution to the global economy grew from US\$ 4.8 trillion to US\$ 5.8 trillion and jobs increased by 18.2 million.

Since 2021, intent to travel and spend have generally been strong. In fact, many of us are travelling as much as we did before the pandemic. And once we're away, most of us want to stay for longer: in 2019, the average round-trip booked on Trip.com lasted just nine days – in 2022, it was almost two weeks.

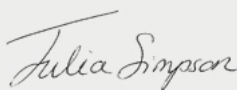
During 2022, the desire to travel again was tempered by growing concerns about the economy. In Deloitte's 'Global State of the Consumer Tracker', 42% of global respondents felt their financial situation worsened in 2022. Inflation in particular could dampen travel demand in the coming year. But even with the possibility of economic hardship on the horizon, there is good news for the sector: people still value travel. In fact, most of us are still putting holidays near the top of our discretionary spending priorities, preferring to economise in other areas. A Skyscanner survey reported that 86% of the respondents intended to spend the same amount or more on international travel in 2022 compared to 2019.

While the urge to explore is typically universal, our habits generally are not. The way we travel is constantly changing, and 2022 was no exception. In November 2021, WTTC and Trip.com Group published a report highlighting the main consumer travel trends as the recovery began. In this follow-up report between WTTC, Trip.com Group and now also Deloitte Global, we include some of these trends that have sustained and strengthened through 2022. One of these was the continued popularity of 'blended' trips, combining business and leisure travel, as people increasingly take time out of a work trip to explore, or tack on a holiday to the end of a conference. Technology, too, is shaping the sector in many ways, particularly when it comes to travellers' decision-making. Last year, more of us turned to online platforms such as Instagram and TikTok for travel inspiration, primarily concentrated among Generation Z and leisure tourists.

Finally, sustainability has maintained its importance as one of the key elements of the travel agenda. Travellers are increasingly looking for ways to reduce their carbon footprint and support sustainable tourism practices. Almost 60% of Trip.com survey respondents have opted for some form of sustainable travel in recent years, and nearly 60% are also either already paying to help offset their carbon emissions or say they are willing to do so at the right price.

As we look to 2023, Travel & Tourism likely has a bright path ahead. WTTC's ten-year forecast puts the sector on track to outpace global growth, at a rate of 5.8% annually, while global GDP grows at just 2.7%. That could translate into 126 million new jobs by 2032. The demand for travel is increasingly stronger than ever – now the rest is up to us.

We wish you a wonderful year, full of travel and adventure.



Julia Simpson
President & CEO
World Travel & Tourism Council



Jane Sun
CEO, Trip.com Group
Vice-Chair, WTTC



Scott Rosenberger
Global Transportation, Hospitality &
Services Sector leader, Deloitte Global

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INTRODUCTION

The COVID-19 pandemic ended a decade of continuous growth for Travel & Tourism, as the sector's total contribution to global GDP fell by almost US\$ 4.9 trillion in 2020 while 62 million jobs were lost. 2021 provided relief as the sector's global economic contribution rebounded by 21.7% and it recovered 18.2 million jobs¹.

In 2022, demand for international travel returned strongly, as governments around the world loosened COVID-related travel restrictions. In 2022, for instance, the number of international overnight arrivals is expected to have doubled (109% annual growth) compared to 2021 – reaching 62% of 2019 volumes.

Zooming in on specific countries, the picture in 2022 was more complex. Some countries removed their travel restrictions, while in other markets – notably **China** – they remained in place. **Southeast Asia**, for instance, is estimated to have seen a strong return of international traveller numbers, but in **Northeast Asia**, recovery was slower, with **South Korea** and **Japan** reopening its borders in the second half of the year.

That said, we may be optimistic about the recovery of Travel & Tourism to pre-pandemic levels in 2023. The return of trends like longer booking windows, with trips planned well in advance, and the revival of city travel, may be signs of a return to normality. The expected return of Chinese travellers to global destinations following the easing of COVID-19 restrictions should further boost global demand.

Future shocks should not be discounted. The sector faces a number of challenges, including high inflation, which can eat away at travellers' disposable income; geopolitical shocks, such as the Russia-Ukraine conflict; staff shortages and capacity constraints. A possible resurgence of COVID-19, and the associated re-emergence of travel restrictions, should not be overlooked either.

Acknowledging the possible risks and the sector's potential for growth, this report from the **World Travel & Tourism Council (WTTC)**, **Trip.com Group** and **Deloitte Global** analyses the changing nature of people's behaviour and preferences. It highlights how intention to travel and spend have remained strong despite the various challenges. For instance, according to Deloitte's Global State of the Consumer Tracker, more than half (53%) of global consumers in June and July 2022 said they planned to stay in a hotel over the coming three months. In the autumn, they intended to retain the same share of their overall budget that they allocate for leisure travel – at 6% – as a year earlier, and cut back on other discretionary purchases first². Building on the intention to travel, this report showcases how consumers are adapting the prioritisation of various trip elements to get the best value from their travel spend. For example, a survey from Skyscanner — Trip.com Group's global travel search platform – found that travellers were willing to economise by picking a destination where their currency will buy more (36%)³.

The experience of the pandemic has resulted in the emergence of new trends and has accelerated others. The analysis here identifies and discusses these, such as **booking flexibility**, the growing influence of **social media** on decision-making, and interest in **sustainable travel**. A survey from Trip.com – Trip.com Group's global travel booking platform – revealed that nearly three-quarters of respondents were willing to choose sustainable travel options in the future⁴.

Furthermore, this report examines the resilience of **luxury travel** and the future of **'blended' travel**, which entails not just adding leisure elements to a business trip – typically termed 'bleisure' travel – but also taking work to do during an extended personal leisure trip. This trend was already emerging in 2021 but has evolved and strengthened during 2022. Lastly, some of **the most popular destinations for travellers in 2022** are presented based on booking data from Trip.com, and forecasts **which destinations are likely to be in great demand in 2023** based on searches on Trip.com and Skyscanner.

The report that follows is structured to reflect the traveller journey: from inspiration to the selection of accommodation and activities, to considerations about sustainability, to ultimately, making a booking and getting to specific destinations.

The data in this research has been primarily sourced from **WTTC's** own economic impact data, **Trip.com Group** (including its brands **Ctrip**, **Trip.com**, **Trip.Biz** and **Skyscanner**) and **Deloitte Global**, with additional insights sourced from **WTTC's Knowledge Partners and Members**, and other relevant organisations.





THE INFLUENCE OF SOCIAL MEDIA

The urge to travel can come from anywhere. A recommendation from a colleague, a magazine advert, or an alluring social media post. Technological innovations have provided novel sources of travel inspiration including the Metaverse. Each person makes decisions differently. But in 2022, there were a few overarching trends, including the continued shift online as more of us look to the likes of Instagram, Facebook and TikTok for travel inspiration.

At the height of the pandemic, when national lockdowns curtailed face-to-face interactions, social media kept many of us connected and entertained. The consumption of digital content and the use of online platforms grew significantly. In the second quarter of 2020, the number of daily active users on Meta Platforms, Inc. (which includes Facebook, Instagram, and WhatsApp) stood at 2.47 billion. Two years later, it had increased by almost 17% to reach 2.88 billion users⁵. This expansion has also resulted in a growing reliance on social media for many. Consumer decisions are now increasingly guided by what they view on social media platforms, and posts by their favourite social media influencers.

The Travel & Tourism sector is no exception. For many eager travellers, the immersive audio-visual experience of social media can present an invaluable source of information. A recent survey from Skyscanner revealed that around half of its respondents made travel plans that were inspired by the content they had seen on social media. Instagram was the most popular source of travel ideas (cited by 40% of the participants), followed by Facebook (33%) and TikTok (25%)⁶. Some travellers are turning to virtual travel communities such as the Trip Moments Community, which enables travel enthusiasts to share photos, tips and inspiration with other users. Around 35% of app users on Trip.com have engaged with Trip Moments in 2022, and nearly a quarter (22%) of those who used Trip Moments were inspired to make a travel booking with the company within a month of viewing content on the platform⁷. The growing influence of social media corresponds with the proliferation of the use of mobile devices to make travel bookings and Trip.com reported that downloads of its mobile application that is driven by social media doubled in 2022.

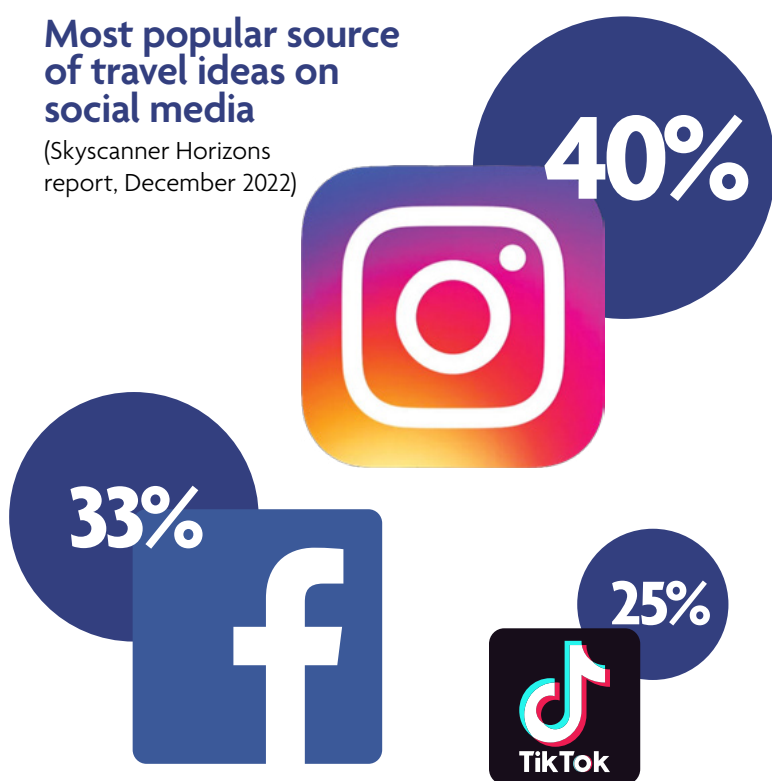
In some markets, this trend has spurred new marketing techniques. In **China**, for example, Ctrip – Trip.com Group's leading Chinese language travel service platform – has launched a livestreaming platform. During the pandemic, this allowed popular holiday packages, hotels, and destinations to be showcased to consumers with live interactions. Almost half of Ctrip Livestream viewers make a travel purchase within 24 hours of viewing content, and the platform has driven around US\$ 1.4 billion worth of sales since its launch⁸.

At present, however, the popularity of social media-influenced travel is mostly concentrated in two segments: younger travellers and leisure travellers. Almost 40% of Generation Z ('Gen Z') travellers (aged in their mid-20s or below) use social media platforms to plan their holidays, compared to just 29% for older generations. Seeing their friends and family post a beautiful picture of their holiday encourages them to venture out too. Among younger travellers, social media platforms rank even higher than 'information from friends and family' and 'a random online search' as a source of decision-making. Almost 20% of Gen Z travellers follow a travel influencer, with higher proportions in **India, Italy** and **Hong Kong**⁹. Those over 45 – who still rely on traditional forms of travel reviews and word of mouth – are less likely to use social media for travel inspiration, while 70% of business travellers still prefer to seek written reviews when making their decisions.

Destination management organisations and other travel marketing professionals have grasped the significance of social media as a source of travel information. Some are already ramping up investments into analytics to improve the targeting and personalisation of their ads. At the same time, more of them are partnering with social media influencers to reach more customers. As the cost of fast and reliable internet falls, the number of users on social media platforms climbs, and innovative methods of virtual interaction emerge, this trend is likely to gain further momentum.

Most popular source of travel ideas on social media

(Skyscanner Horizons report, December 2022)



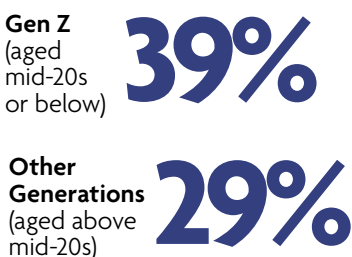
Innovating consumer interaction: Ctrip's Star Hub & Livestream

Despite international travel being impractical for many throughout 2022, innovations in travel content introduced throughout the pandemic such as Trip.com Group's Ctrip Livestream and Star Hub platforms have kept destinations in touch with travellers, and helped pioneer new ways to interact with consumers, inspiring Ctrip users to plan travel for 2023 and beyond.

Ctrip Livestream programmes routinely attract audiences in the hundreds of thousands to millions, with in-destination livestreams from Galeries Lafayette in Paris, France and Yamanashi Prefecture, Japan each attracting an audience of more than 1.5 million, and a livestream focused on the Songkran Festival (Water Festival) in Thailand attracting almost half a million viewers. Thematic livestreams also attracted large audiences, with Ctrip's 'US California Live Week' and New York focused 'Boss Live' programme each attracting over 3 million viewers, while 'Canada Live Week' was viewed by over 600,000 people, with outdoor experiences emerging as a popular new trend.

% of travellers using social media platforms to plan holidays:

(YouGov, June 2022)



WHAT TYPES OF TRIP ARE PEOPLE PLANNING?

Having been inspired to journey out into the world, the next step for an eager traveller is to decide what type of trip they are looking for. Some venture out to experience different cultures. Some seek the thrill of cities, while others are drawn to the calm and beauty of sun and beach destinations, and some travel for wellness. But which were popular in 2022? And what are the emerging trends to look out for next year?

For years, beaches and cities ranked among the top destinations for travellers. However, the pandemic hit hard: the decline in leisure travel took a toll on sun and beach locations, and the drop in international tourists and business travellers saw a fall in visits to city destinations too. As people sought to avoid crowds, travel shifted away from these traditional holiday choices and towards rural and other outdoor locations.

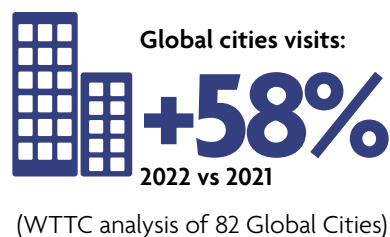
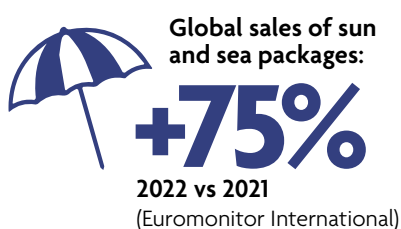
As lockdown restrictions have eased, the love for traditional beach and city destinations is re-emerging. Global sales of sun and sea packages are estimated to have reached nearly US\$ 69 billion in 2022, an increase of 75% compared to 2021, with beach holidays making up 35% of worldwide packages – back to the same share they had in 2019¹⁰. In July 2022, international tourist arrivals in European sun and beach destinations were only around 15% below 2019 levels, from 40% lower at the beginning of the year. Globally, international tourist arrivals to sun and beach locations improved from 36% below pre-pandemic levels in the first half of 2022 to 23% below in the second half of the year¹¹.

City travel is also trending upward. WTTC has recently reported that arrivals to cities have risen rapidly – with analysis of 82 global cities showing that visits are expected to have increased by 58% in 2022. This represents a recovery to about 14% below 2019 levels. As a result, the direct contribution of Travel & Tourism to the economy of these cities is set to have increased by 53% in 2022 after an initial recovery of 35.6% in 2021¹². Many of these visitors may, of course, also travel beyond the gateway city to explore other destinations within the same country.

Business travel suffered from the impacts of COVID-19 more than other travel segments and was due to be one of the last to recover. However, we have seen it making a positive comeback in 2022. According to Deloitte's Global State of the Consumer Tracker in September 2022, 58% of respondents who said they require occasional business travel were likely to take a trip in the

next three months. This represents an improvement on the previous year, when only 51% said they were likely to. Sentiment in **Latin America** and **Spain** was even stronger, as the share of respondents likely to take a business trip rose by 15 percentage points and 13 percentage points respectively between 2021 and 2022¹³. Similarly, Trip.Biz – Trip.com Group’s corporate travel management platform – reported an annual increase of 134% in flight bookings in 2022¹⁴.

When it comes to leisure travel, some of the key reasons for taking a trip are for relaxation, to go to a place because it is on a ‘bucket-list’ and to visit friends and family. In a Skyscanner survey, 41% of respondents for example, stated that they would spend more on ultimate relaxation trips in 2022 compared to 2019. The share was even higher among **Australian** respondents (50%) and **German** respondents (44%)¹⁵. Tripadvisor data backs up these results, with ‘relaxation’ and ‘making memories with friends and family’ among the top reasons to travel in 2022¹⁶.





3

THE RESILIENCE OF TRAVEL AMID ECONOMIC UNCERTAINTY

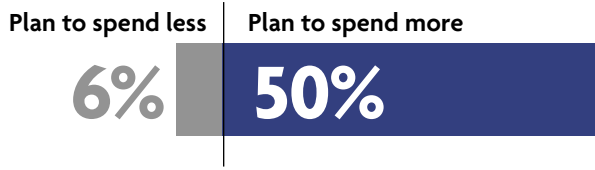
A holiday can be a big expense. Some prefer to spread their paycheck over several small trips, while others save up for an annual escape. And on the move, each person budgets differently. What were our travel priorities in 2022? Did we opt for planes, trains or cars? Hotels, or private accommodation? And with tough economic times ahead, how will travel be affected?

After the restrictions imposed during the pandemic, many people have been eager to travel internationally again. The release of pent-up demand became known as ‘revenge travel’, with many choosing to use their accrued savings to spend more than they had before – even prior to lockdowns. In a Skyscanner survey, for example, half of travellers said they planned to spend more in 2022 than in 2019, and only 6% planned to spend less¹⁷. Similarly, a Deloitte survey of US travellers in spring 2022 revealed that 28% were likely to spend significantly more than in 2019, while only 15% were likely to spend significantly less¹⁸.

People were also generally happy to spend on accommodation. More than half (53%) of global consumers in Deloitte’s Global State of the Consumer Tracker in July 2022 said they planned to stay in a hotel over the coming three months, while 37% said they were likely to stay in private accommodation. There were also regional variations in spending: in **Latin America**, 60% of people said they planned a hotel stay, while 56% of respondents in the **Middle East** were likely to stay in private lodging. In fact, demand for accommodation has recovered so well that by September 2022, the hotel industry saw global demand for rooms return to more than 90% of 2019 levels⁹.

In the same Deloitte survey, intent to take domestic and international flights was similar, both sitting at about a third of respondents worldwide. Consumers in the **Middle East** had the highest intent to fly, with 66% likely to take an international flight and 63% likely to take a domestic flight. By autumn 2022, international flight bookings had recovered to a similar level as domestic flights, with purchases for both around 30% below 2019 levels²⁰.

Traveller spending intentions 2022 vs 2019



(Skyscanner Horizons Report May 2022)

Average amount consumers intended to spend on leisure travel in the following month

(Deloitte Global State of the Consumer Tracker)

Country	Average intended spend (July 2022)	Change (Sep 2022 vs Sep 2021)
US	US\$325	-23%
China	US\$157 (¥1,056)	-8%
France	US\$258 (€262)	-18%
Italy	US\$288 (€293)	-22%
Spain	US\$267 (€271)	-7%
United Kingdom	US\$146 (£175)	-23%

Currency exchange rate source: IMF, July 2022

As the year progressed, however, people began to worry about the economy. The combined effect of rising inflation and interest rates, turbulent currency markets and global energy shocks has likely led to a squeeze on the cost of living for many consumers, as well as pushing up the prices of travel purchases. In Deloitte's Consumer Tracker, 42% of global respondents in December 2022 felt their financial situation had worsened over the past year. There are some signs that inflationary pressures could be starting to have an impact on travel intentions too, particularly for those living in **Europe** and **North America**. In September, intent to book travel declined year-on-year, across markets globally, for the first time since the launch of Deloitte's Global State of the Consumer Tracker in April 2021. And the amount that travellers intended to spend on travel dropped as well, by more than 20% in some countries.

But even when times are tough, there is good news for the sector: many people still value travel. In fact, most are still putting holidays near the top of their discretionary spending priorities, preferring to economise in other areas such as electronics or home furnishing. In autumn 2022, consumers intended to keep spending an equal proportion of their overall budget on leisure travel in the following month as they did a year earlier: 6% as a global average, and 9% for those in **Latin America**. Memories of the pandemic have lasted, and for many, holidays are treated as one of the most valued areas of their overall discretionary budget; a part of life that they may choose to sacrifice other things for, rather than give up altogether.

Global share of wallet, spending intentions on more discretionary items

Rank	Change in % vs August 2022	Change in % vs Sept 2021
Recreation/ Entertainment	=	=
Leisure Travel	=	=
Restaurants	=	=
Electronics	=	-1
Home Furnishings	=	-1
Saving/Investing	=	-1

This shows the change (if any) in percentage share of wallet for each discretionary item over time.

(Copyright: Deloitte Global State of the Consumer Tracker, September 2022)

Overall, actual travel spending is on the rise compared to 2021, although it hasn't yet exceeded 2019 levels. Average spending on flight bookings in 2022 was 37% higher than in 2021 and 11% below pre-pandemic levels, according to Trip.com data²¹. Meanwhile, average spending on accommodation was up by 10.5% on 2021, and just 6% below 2019 levels. A recent Skyscanner survey suggests that travellers are optimistic that this rise in travel spend should continue well into 2023. While worries about inflation may dampen some spending, the sector is still predicted to grow. A significant 41% of travellers on average said they intended to spend more in 2023 than in 2022. In particular, they plan to spend 31% more on international travel. More than half of respondents in the **UAE** (57%) and **Saudi Arabia** (53%) were looking to splurge in 2023²².

SPEND OR SAVE: TRAVEL BUDGETING PRIORITIES

The data from travel providers in 2022 tells a simple story: even when things are tough, many people still value travel. And despite worries about an economic downturn on the horizon, most people will prefer to economise in other areas rather than cut **their travel budget**. But how did we prioritise our spending on different travel elements during 2022, and what are the emerging trends to look out for in 2023?

As ever, cost remains the crucial factor when planning a trip for the majority of people. In July 2022, roughly 60% of travellers said that inflation would impact how they intended to travel in the autumn²³. The issue of affordability is particularly important for Gen Z. These younger travellers say they value deals and discounts as the most useful travel resource. When planning a trip, they tend to rank affordability far higher than other elements (such as personalised recommendations). And at various ages, even though people are still determined to travel, travellers are increasingly searching for ways to optimise their budget.

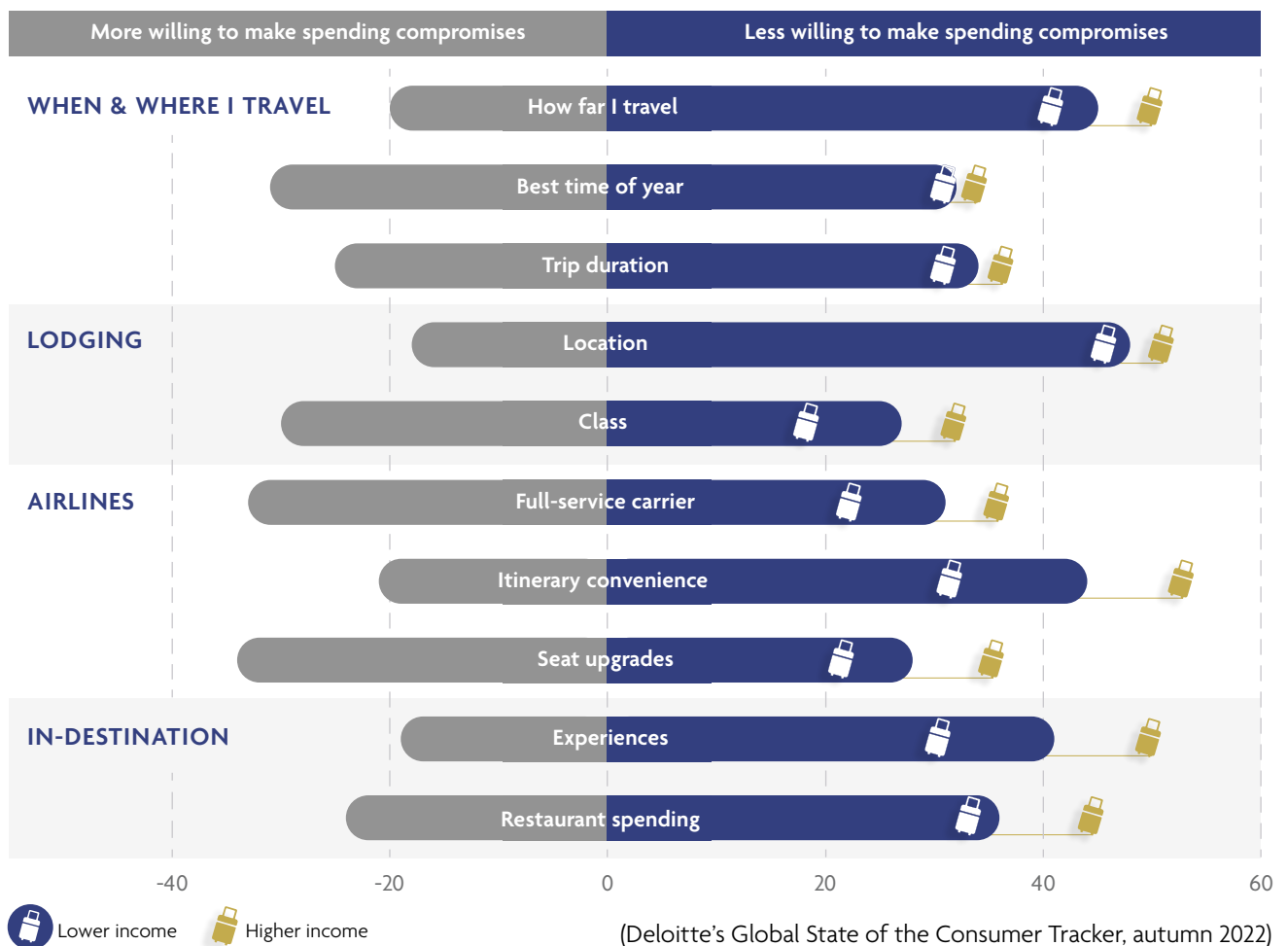
60%

of travellers said that inflation would impact the way they intended to travel

(Tripadvisor, July 2022 for travel in Autumn 2022)

There are some elements of a trip, however, that people may prioritise even if they could save money by choosing an alternative. According to Deloitte's Global State of the Consumer Tracker (see table on next page), on average, they are least willing to reduce their spending when it comes to their choice of destination (regardless of distance) and the precise location of their lodging. They are also more reluctant to compromise on their flight itinerary, often preferring to pay more if they can avoid layovers or inconvenient flight times. Travellers are also less willing to compromise on their in-destination experiences and dining out.

On the other hand, consumers are most willing to economise by using a low-cost carrier rather than a full-service airline, foregoing seat upgrades and opting for mid-scale or budget accommodation.



A Skyscanner survey also found that travellers were willing to economise by picking a destination where their currency will buy more (36%)²⁴.

As airlines continue to offer a wide variety of bundled and unbundled products – where elements like seat selection and bags might not be included in the cheapest ticket options – travellers are taking control of their airfares by selecting the fares that give them the most value and flexibility, based on their individual needs and budget.

In 2022, Skyscanner found that travellers were spending significantly more on 'extras' than before the pandemic, with fare upselling up by 725%. Extra checked baggage was a popular add-on, with 30% of customers saying they would pay for a higher allowance, resulting in double the number of purchases compared to 2019. Insurance was another popular add-on, with 31% of travellers saying they would add coverage to their flight booking²⁵.

5

LUXURY TRAVEL REMAINS BUOYANT

At the start of the start of the recovery from pandemic restrictions in 2021, the luxury travel segment was set to be one of the first to return to previous levels of success as many consumers finally had the chance to use their savings and indulge and celebrate after life in lockdown. However, with each shift in our economy, demand for luxury travel can shift too. With today's financial pressures, will the sector continue to thrive?

In previous years, the luxury travel segment has benefitted from the spending power of its customer base. Though a broad category, luxury travel generally includes components such as private jets, yachts, premium flights, and five-star hotels. Recently, hyper-personalisation has become important to luxury travellers too.

Despite the current global financial challenges, the luxury travel market has proven resilient. On Trip.com, the number of bookings for five-star hotels grew by 19% in the first three quarters of 2022 compared to the same period in 2021, taking it just 7% below pre-pandemic volumes. Euromonitor estimates that global sales of luxury hotels expanded by an average rate of 39% in 2022, with stronger growth rates in the **Middle East and Africa** (53%) and **Western Europe** (45%). It also forecasts that luxury hotel sales should reach around US\$ 92 billion by 2025 compared to US\$ 76 billion in 2019 (in current prices). In comparison, budget hotel sales globally grew by 23%²⁶.

The demand for luxury hotels has been accompanied by a strong demand for premium flights. According to ForwardKeys data, passengers in premium flight cabins were around 60% below 2019 levels in the first quarter of 2022. By the end of the year, premium bookings for the first three months of 2023 had soared and so were only 16% below volumes for the same period pre-pandemic²⁷. A Skyscanner survey also reported a strong demand for premium cabins, particularly in markets with higher GDP per capita. For instance, around one in three travellers in the **US, Saudi Arabia**, and the **UAE** said they were likely to fly in first or business class, compared to the global average of just one in five²⁸. International travel is the more popular choice for luxury travellers who book premium flight cabins, as nearly 82% of business and first-class flight bookings on Trip.com in 2022 were for international routes. This share increased from 68% in 2021 and is even higher than the 79% share in 2019²⁹.

Just as the broader Travel & Tourism sector is placing greater emphasis on sustainability, many luxury travellers are also determined to reduce their environmental footprint. In a Virtuoso survey, around three-quarters of high-end travellers said they were willing to pay extra to make their trips more sustainable. Crucially, luxury travellers also have the purchasing power to afford to make their sustainable travel intentions a reality³⁰.

Bookings for 5-star hotels:

+19%

(Q1-3 2022 vs 2021, Trip.com)



Likely to fly in first or business class:

1 in 5

(Global average –Skyscanner Horizons , December 2022)



BUSINESS AND LEISURE: A POPULAR BLEND

Travelling for work can be a great way to discover new places. Whether it's a quick meeting, a conference in a nearby city, or an extended international trip, business travel can be an opportunity to encounter people and destinations we might not otherwise think of. Crucially, business travel has the potential to bring large quantities of high spending visitors to a destination throughout the year, and so extending the tourism season in many cases. And increasingly, more of us are combining work and play – taking time out of a business trip to explore locally or adding a holiday onto the end of a conference. But did our corporate travel habits change in 2022? And what are the emerging opportunities for governments and tourism providers?

Business travel was disproportionately affected by COVID-19, with global corporate travel spending declining by 56% in 2020. Despite the challenges of the past two years, the sector is now adapting and recovering. Indeed, the value of face-to-face meetings cannot be overstated, and they are unlikely to be completely replaced by online meetings.

2021 saw the start of the recovery for the business segment, which grew by 31% compared with 2020 levels³¹. This rebound in business travel has sparked another trend too: the recovery of so-called 'blended' travel. One in six respondents are likely to take blended trips in 2023, according to Skyscanner³². Flexible working, which has been accelerated by the pandemic for many, is one of the contributors to the growth of 'blended' trips. The MICE (Meetings, incentives, conferences, and exhibitions) industry is also highlighting opportunities for potential attendees to extend their stay. Euromonitor forecasts that global spending by travellers combining business with leisure should more than double between 2021 and 2027 – from US\$ 150 billion to about US\$ 360 billion³³.

The popularity of blended travel can also be seen in payment data. On Trip.Biz, travellers are increasingly selecting both 'Personal Travel' (for personal spending) and 'Mixed Payments' (to supplement corporate budgets with personal funds). In 2022, bookings for personal flights increased by 22% in comparison to 2021 and by 33% compared to pre-pandemic, with a similar trend in accommodation bookings. The number of 'Mixed Payment' bookings has increased by a staggering 954% since 2019³⁴.

For employees, combining work and leisure can make trips more affordable, as components of the journey are covered by an employer. They can use those savings to spend in the destination, thereby bringing in more revenue to the local economy. For the employer, allowing staff to combine leisure and business trips can result in higher employee satisfaction and greater workforce retention. A Trip.Biz survey reported that nearly 70% of travel managers are supportive of the idea of mixing leisure with business trips.

Since the pandemic, the rise in blended travel may have contributed to the increase in the overall average length of stay for travellers. In 2019, the average duration for a round-trip booked on Trip.com was nine days. In 2022, it increased to around 14 days. Data from ForwardKeys shows a similar trend, with the average length of stay up from 11 days in 2019 to 14 days in 2022 (based on arrivals from January to December 2022). The share of long stays (a fortnight or more) jumped from 20% of all bookings in 2019 to 26% in 2022, although this trend varied across different world regions, with considerably larger increases in **Asia-Pacific** and **North America** compared to regions like the **Caribbean** and the **Middle East**³⁵.

To take advantage of this growing trend towards blended trips, several governments across the world are introducing specialist visas. Known as 'digital nomad' visas, these allow overseas visitors to work remotely in a country for an extended period, usually tax-free. **Barbados**, for example, rolled out the 'Barbados Welcome Stamp', allowing people to live and work remotely there for 12 months without being subject to local income tax regulations³⁶. In **Europe**, the **Spanish** government is introducing its own Digital Nomad visa in 2023³⁷.

Global spending by travellers combining business with leisure



(Euromonitor forecast, US\$)

Average length of stay



The average duration for a round-trip booked on Trip.com

Likely to take a blended trip in 2023:

1 in 6

(Skyscanner Travel Trends 2023)

THE SUSTAINABLE TRAVELLER

According to WTTC's Environmental and Social Research (ESR), in 2019, Travel & Tourism accounted for 8.1% of greenhouse gas emissions worldwide, and the sector is ramping up efforts to reduce its footprint³⁸. In October 2022, members of ICAO (the International Civil Aviation Organisation) agreed to pursue a net-zero aviation sector by 2050³⁹; a testament to the growing resolve to make travel greener. The pandemic has played a big role in accelerating the shift as consumers enjoyed an improvement in air quality following a pause in economic activities and developed intentions to reconnect with the natural environment. However, the absence of travel has also emphasised its importance, and the desire to travel remains very strong. Hence, sustainable travel, which combines both of these crucial elements, has gained momentum. For travel providers, this represents an opportunity to decouple their growth from emissions and further reduce their emission intensity which is already on a downward trajectory – falling by an average rate of 2.3% annually since 2010⁴⁰.

It's perhaps unsurprising, therefore, that 67% of the respondents in the Trip.com Group Sustainable Travel Consumer Report cited the pandemic as one of the reasons they felt compelled to explore sustainable travel⁴¹.

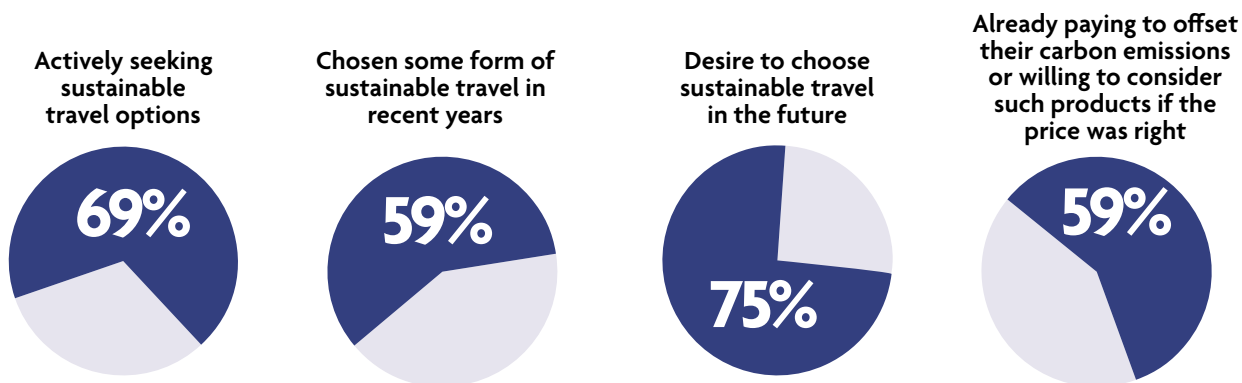
The Trip.com survey also reported a strong commitment among travellers to reduce their carbon footprint. More than half (59%) had opted for some form of sustainable travel in recent years, 69% of travellers are actively (always or occasionally) seeking sustainable travel options, and three quarters (75%) stated a desire to choose sustainable travel options in future. More than half (59%) were either already paying to offset their carbon emissions or willing to consider such products if the price was right.

The trend appears to be growing among corporate travellers too. American Express Global Business Travel – a major player in the business travel segment – has used carbon credits to help offset the flights taken by its employees since 2019⁴². Others are increasingly following suit. In a Trip.Biz survey, 53% of business travellers said they had made a conscious effort to adopt more sustainable practices during their trips. Their efforts ranged from reducing water use at hotels to bringing their own reusable items such as toothbrushes⁴³.

Since June 2022, Trip.com – in collaboration with CHOOOSE, a global climate technology company – has offered consumers the option to purchase carbon offsets when booking a flight. Since the option was added, its uptake has grown at an average of 33% each month, and most (85%) of the purchases were made by consumers booking international flights. This typically adds 4.7% to the cost of their airfare. The trend is evidence that some consumers are now actively taking steps to help reduce their carbon footprint, even when it costs extra. More than half (51%) of those opting to help offset their emissions were based in the **UK, Germany** and the **US**⁴⁴.

Sustainability is not just about the climate. Travel has an impact on communities too. Today, more people are choosing to purchase locally sourced products when they travel, and actively plan their travel itineraries to include activities that support local economies. There is also a growing interest in the ‘Circular Economy’ as travellers attempt to reduce, reuse, and recycle their travel items. In a recent YouGov survey, almost half (48%) of global respondents said that it is important for them to choose travel companies that have a strong sustainability policy that supports local communities as well as protecting the planet⁴⁵.

As the barriers to sustainable travel diminish, this trend should continue, and the sector has already begun responding. Travalyst is one example. This not-for-profit sustainable travel alliance between the biggest industry players, including Trip.com, Booking.com, Skyscanner, Tripadvisor and Visa, has a goal of bringing credible and consistent sustainability information to both travellers and travel companies so they can make better decisions⁴⁶.



(Trip.com Group Sustainable Travel Consumer Report, 2022)

WILL OUR PANDEMIC BOOKING HABITS LAST?

Travellers may remember 2020 and 2021 for the uncertainties that dogged their travel plans. The lack of a coordinated response to COVID-19 and a patchwork of travel restrictions likely contributed to a general sense of confusion. Travellers had to understand the status of border closures, and requirements on quarantines and vaccinations, while pre-departure tests became an additional hassle for many. Staff shortages in the summer of 2022 across many countries also prompted airlines to cancel flights, and airports to restrict capacity, which is likely to have further weakened people's confidence.

Flexible booking and payment options

With this much uncertainty, the demand for flexible bookings boomed. Many travellers wanted the task of amending flight and hotel dates to be less costly and cancelling bookings to be effortless. They were also more willing to spend on travel insurance that covered flight cancellations.

In the **US**, for instance, according to Phocuswright, 13% of survey respondents selected 'a simple policy for making cancellations or changes' as a reason for their choice of flight booking method in 2021. This proportion increased to 20% in 2022. For accommodation bookings, 16% of respondents in 2021 selected it as one of the reasons for their choice of booking method. In 2022, this rose to 22%⁴⁷. Cost and convenience remained the chief drivers of booking method choice, but demand for flexible booking grew, too.

Additionally, in **China**, evidence for the increased popularity of flexible booking is to be found in the purchasing of hotel booking vouchers on Ctrip. Normally redeemable up to six months after their purchase and refundable if unused, they provide flexibility in a market still reeling from the pandemic. In 2022, uptake of vouchers increased by 34% compared to 2021, and by 71% when compared to 2019. Travellers between the ages of 22 and 42 were the main buyers of these flexible vouchers, accounting for three-quarters of sales⁴⁸. Furthermore, the insurance provider, Allianz Partners, reported a significant increase in consumers' intention to purchase travel insurance for upcoming trips – from 21% in 2019 to 55% in 2022⁴⁹. This data complements the findings of a Tripadvisor survey which stated that 78% of travellers believed flexible cancellation was essential for future trips⁵⁰.

Flexible payments mattered to travellers too. Innovations in the payments sector have created an array of payment methods, such as Apple Pay⁵¹, the mobile payments solution, and buy now, pay later (BNPL) options. Some offer faster payment, while others allow customers to spread travel costs.

A wider array of payment choices means travellers can pick the most convenient option. An Amadeus survey, for example, found that 75% of travellers were more likely to pick a BNPL option to fund their trips⁵². In the **UK**, 94% of travel and aviation representatives in an ECOMMPAY survey reported a growth in the use of this method⁵³.

While the sector is returning to pre-COVID normality, demand for flexibility remains. Many travellers still place a high value on being able to amend and cancel their bookings. That said, this demand is likely to fall in due course. As memories of the pandemic fade and concerns about inflation grow, this may lead consumers to prioritise other factors such as cost over flexibility. It remains to be seen how travel providers strike a balance between demand and affordability, and the high operational costs associated with providing flexible bookings. Travel & Tourism providers should respond and remain agile as the world inevitably changes again.

A return to longer booking windows

Restrictions and uncertainties also contributed to an increase in short booking windows, with travellers dissuaded from making long-term plans. However, a resurgence in traveller confidence in 2022 has ushered in the return of longer booking windows.

A recent TripAdvisor survey, for instance, reported that nearly half of respondents were planning trips three to six months in advance of their departure date. Travellers in the **US** and the **UK** were more likely to be long-term planners than their Japanese counterparts, perhaps due to the delay in **Japan** reopening its borders⁵⁴. On the Trip.com platform, meanwhile, the average consumer booked their flight 32 days in advance of their take-off date before the pandemic. In 2021, this fell to just 16 days. However, in 2022, the booking window for flights on the platform recovered to 27 days in advance⁵⁵.

ForwardKeys has also witnessed a strong shift away from short lead times. In **Europe**, short flight booking windows (within two weeks of travel) in 2022 accounted for 23% of all arrivals, down from 30% in 2021 and even lower than the 27% share in 2019⁵⁶. According to a Phocuswright survey, in the **US**, 28% of air bookings were made less than two weeks prior to departure in 2019. That share increased to 40% in 2020 but had already fallen back to 32% by 2021⁵⁷. Accommodation bookings also show a similar trend of the return to longer average lead times – 11 days in advance of arrival in 2022 as opposed to eight days in advance in 2021⁵⁸.

In comparison, in **China**, which historically has shorter booking windows, longer lead times have struggled to gain traction. Ctrip reported that 71% of flight bookings and 91% of hotel bookings were made less than a week before the day of travel in 2022, a trend unchanged since the beginning of the pandemic⁵⁹. The continued COVID-related uncertainties in the country were a leading factor behind this.

Intention to purchase travel insurance

2019 **21%** 2022 **55%**

(Allianz Partners, 2022)

78%

Of travellers see flexible cancellation as essential for future trips

(Tripadvisor, 2022)

Flight booking windows

2019 **32** days

2021 **16** days

2022 **27** days

(Trip.com, 2022)

TOP DESTINATIONS

What were the most booked travel hotspots in 2022?

2022 saw both the emergence of new destinations and the return of old favourites. Whether it was the World Cup in **Qatar** or the Eurovision Song Contest in **Italy**, many of us flocked to see culture, sport, beaches, cities and wildlife. But which were the most-visited destinations? Data from global travel providers gives us a glimpse into people's holiday bookings in 2022.

Due to remaining fears around COVID-19 and travel restrictions, 2021 was a year of domestic re-discovery, as identified in a previous report jointly published by WTTC and Trip.com Group in 2021⁶⁰. And while domestic trips have continued to increase, 2022 marked the return of international travel. The removal of COVID-era restrictions in many countries around the world allowed people to travel to much-anticipated foreign destinations. As a result, overnight international arrivals across the globe are expected to have more than doubled (109% annual growth) in 2022 compared to 2021, reaching 62% of pre-pandemic levels⁶¹.

Some parts of the world bounced back faster than others. Although the **Asia-Pacific** region experienced a return of international visitors, with estimated annual growth of 280% in 2022, the picture was mixed at a local level. **Southeast Asia** witnessed the strongest annual growth of overnight international arrivals with an almost 13-fold estimated increase. In **Northeast Asia**, international arrivals are only expected to have increased by 28%, as many of these countries retained pandemic restrictions for longer than others (notably **China**)⁶².

Booking data from Trip.com also shows the strong performance of international travel in 2022. International flight bookings on the platform increased more than sevenfold in 2022 compared to 2021 – a recovery to 75% of 2019 levels. In the same period, international accommodation bookings increased by 233%, reaching 73% of 2019 volumes⁶³.

Transatlantic travel between **Europe** and the **US** has also bounced back strongly. Bookings on Trip.com for US hotels by British travellers increased by 382% in 2022, while bookings for European hotels by American travellers increased by 111%.

In general, travellers flocked to familiar international favourites, indicating a return to pre-pandemic itineraries. Flights and accommodation bookings on Trip.com reveal the Top 20 global destinations in 2022, as seen in the Bookings map on the following page.

A city of note is **Doha**, Qatar's capital. It became one of the most popular destinations, particularly at the end of 2022 as it welcomed football fans for the World Cup. In the weeks leading up to the event, flight bookings to Doha rose consistently at an average rate of around 20% on Trip.com, which represents an increase of 570% over the same period in 2021 and an increase of 420% over pre-pandemic volumes in 2019.⁶⁴ On Skyscanner, the city emerged as the top destination worldwide in 2022⁶⁵. According to WTTC's latest cities economic impact research, 10 out of 82 global cities (included in the analysis) are expected to surpass 2019 levels in 2022 in terms of direct Travel & Tourism GDP. In addition to Doha, these are - in order of growth - **Warsaw**, **Sanya**, **Orlando**, **Rio De Janeiro**, **Las Vegas**, **Miami**, **Johannesburg**, **Lisbon** and **Antalya**⁶⁶.

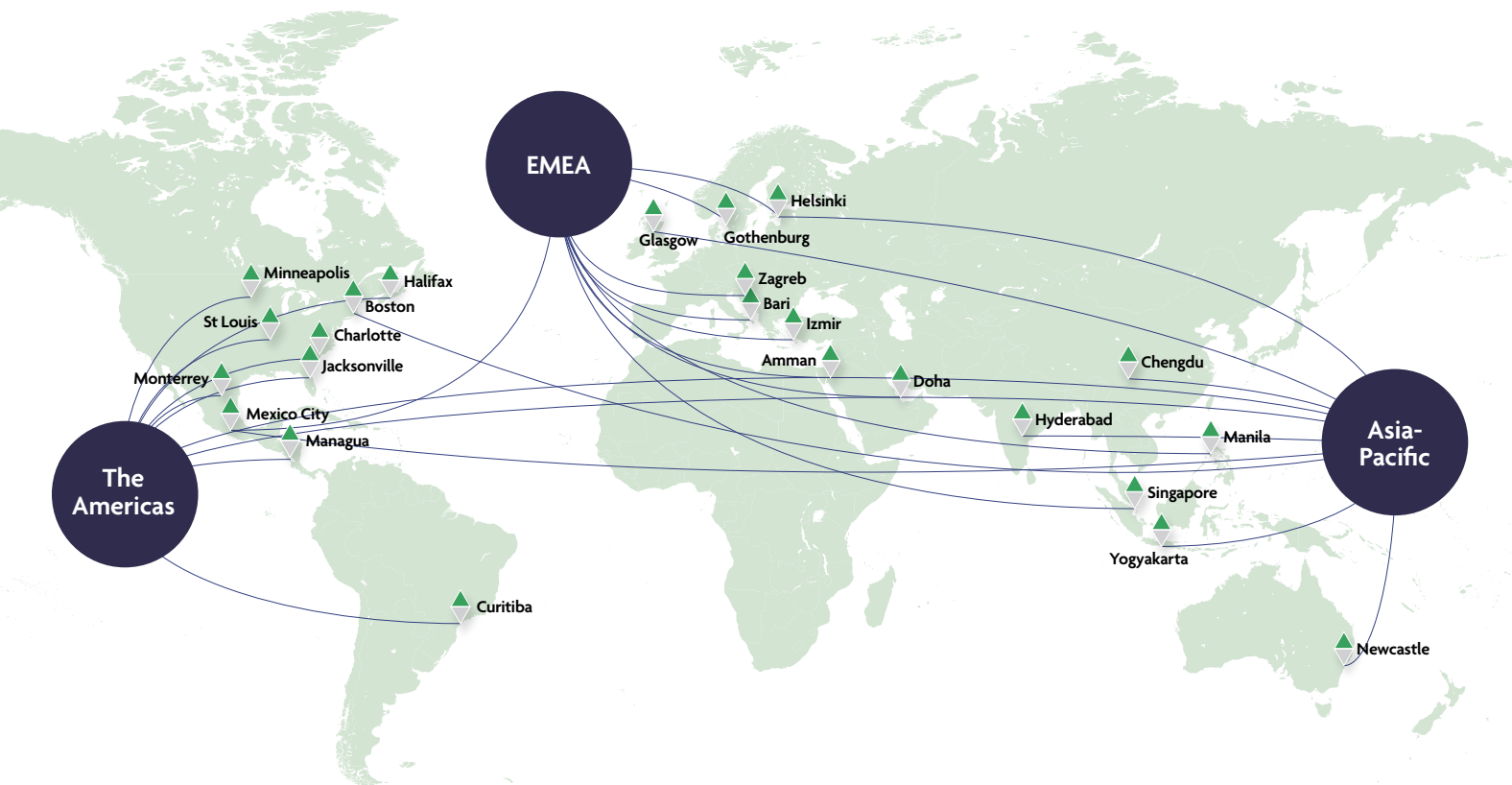
Top destinations: 2022 bookings

According to flight and accommodation bookings on Trip.com



Fastest growing destinations

The cities that saw the largest increase in Skyscanner searches in 2022 vs 2019 by region



What are the most searched dream destinations for 2023?

With international tourism back on track, many travellers around the world are eagerly planning their trips for 2023. By the end of December, for instance, forward flight bookings for the three months to March 2023 were just 5% below 2019 levels in the **Middle East**, just 8% below the same period in 2019 in **Africa**, 13% below in the **Americas**, and just 17% below in **Europe**⁶⁷.

Search data for hotels (via Trip.com) and flights (via Skyscanner) in December gives us a glimpse into where people plan to travel in 2023, as seen in the map below. In the **Americas**, hotel searches suggest that travellers have their sights set on the US, Canada, Brazil, New Zealand, China, Japan, Thailand, Malaysia, Qatar and the UK. In **Europe, the Middle East and Africa**, the most-searched destinations for hotel stays include the UK, France, Spain, Portugal, Turkey, Saudi Arabia, the UAE, Thailand, and the US. In the **Asia Pacific** region, travellers searched for hotels in Japan, China, South Korea, Thailand, Malaysia, Singapore, Indonesia, Australia, Fiji and the US⁶⁸.

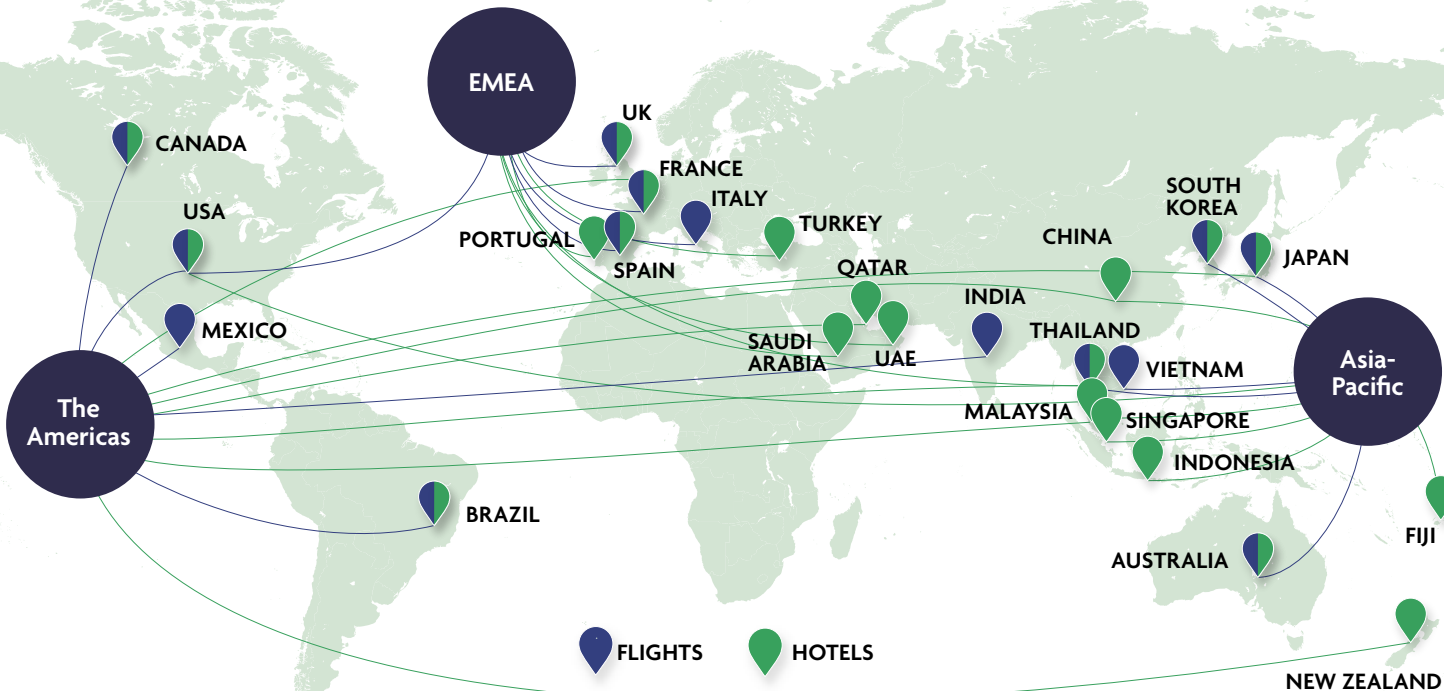
According to Skyscanner, the top searches for flights in the **Americas** were to Canada, the US, Mexico, Brazil and India. In **Europe, the Middle East and Africa**, travellers looked for flights to the UK, France, Spain, Italy and the US. In **Asia and the Pacific**, popular flight destinations included Japan, South Korea, Thailand, Vietnam and Australia⁶⁹.

As much of the world returned to travelling abroad, one market remained largely closed: **China**. Before the pandemic, China was the largest source of outbound spending, accounting for 15% of the global total. In 2022, however, outbound travel from the country remained dormant due to the remaining COVID-19 restrictions. This is likely to change in 2023. On 26th December 2022, China's government announced the reopening of its borders and the removal of quarantine requirements for travellers. According to data from Ctrip, searches for outbound travel from mainland China surged tenfold within just half an hour of the announcement – marking a three-year peak. Some of the most popular destinations for the Chinese New Year holiday period, based on searches throughout December, were: Australia, Hong Kong, Japan, Macau, Malaysia, Singapore, South Korea, Thailand, the UK, and the US⁷⁰.

For 2023 in general, the most popular dream destinations among Ctrip users are: Australia, Austria, Canada, France, Fiji, Germany, Iceland, Indonesia, Italy, Japan, Malaysia, the Maldives, Qatar, Singapore, South Korea, Spain, Thailand, the UK, and the US.

Top destinations: 2023 searches by region

According to hotel searches on Trip.com and flight searches on Skyscanner





CONCLUSION

2022 was a positive year for the Travel & Tourism sector, and for international travel in particular, as COVID-19 restrictions continued to ease around the world. Several challenges lay ahead through 2023, but despite current inflation-driven economic woes and geo-political risks, together with the ongoing issues of staff shortages and capacity constraints within the sector, consumers' desire to travel remains unabated. In fact, most of us are still putting holidays near the top of our discretionary spending priorities, preferring to economise in other areas.

Last year saw a return to some traditional pre-pandemic trends among consumers, such as a renewed interest in visiting cities and booking their trips further in advance. However, the pandemic has also resulted in the emergence of new trends and accelerated older ones. These include the growing influence of social media on decision-making, the desire for flexible booking policies and payment options when booking a trip, and an increased tendency towards trips that blend work and leisure. Interest in sustainable travel remains strong, while the luxury segment has maintained its resilience.

Understanding and embracing these latest trends in an ever-changing world should enable businesses, governments and communities to adapt and deliver authentic and memorable travel experiences whilst prioritising sustainable, inclusive and resilient growth that benefits people and planet.

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AUTHORS AND EDITORS

Nejc Jus

Head of Research
World Travel & Tourism Council

Jonathan Mitcham

Senior Research Analyst
World Travel & Tourism Council

Chok Tsering

Junior Research Analyst
World Travel & Tourism Council

CONTRIBUTORS

Bo Sun

Chief Marketing Officer, Trip.com Group

Pluto Peng

Head of Global PR, Trip.com Group

Danna Yili

Director of Global PR, Trip.com Group

Verra Wang

Senior PR Manager, Trip.com Group

Matt Bradford

Industry Communications & Strategic Insights Lead, Skyscanner

Mujahidul Hossain

Senior Business Analyst, Trip.com Group

Colin Xue

Data Analyst, Trip.com Group

Callum Smith

Chief Editor, Trip.com Group

Scott Rosenberger

Global Transportation, Hospitality & Services Sector leader,
Deloitte Global

Adele Labine-Romain

Travel, Hospitality & Leisure Sector leader, Deloitte Australia

Teresa Solis

Tourism and Regional Development director, Deloitte S-LATAM

Maggie Rauch

Transportation, Hospitality & Services Research, lead,
Deloitte Global

Upasana Niranjana Naik

Transportation, Hospitality & Services Research, senior analyst,
Deloitte Global

Meghan Gragtmans

Global Consumer Industry Marketing leader, Deloitte Global

Molly Campbell

Global Transportation, Hospitality & Services Sector, specialist,
Deloitte Global

DESIGN

Andrew Currie

Designer, World Travel & Tourism Council



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