

2021 Deloitte holiday travel survey

How Americans plan to explore and reconnect

November 2021



Letter from the practice

This is the first iteration of Deloitte's Holiday Travel Survey (our [second leisure travel report of 2021](#)), and what an interesting time to take the pulse of the American leisure traveler. Since the COVID-19 pandemic began, many in the United States and around the world have felt the frustration of not being able to travel. Bans, restrictions, and general concern have delayed family gatherings and nixed dream trips. Travel certainly is not the most acute or consequential pandemic loss, but it is high on the list of experiences many have missed and long to return to.

And Americans *are* returning to the roads and skies, as well as hotels and rentals, but health and financial concerns are keeping some home and limiting options for many others. A troubling trend of bifurcation, with high-income households returning to travel much faster than low-income households, has strengthened since our summer survey. And Americans over 55 also are lagging in the return to travel, primarily citing health concerns.

Our surveys are uncovering plenty of reasons to hope for leisure travel's robust rebound. Very close to half (47%) of 35-to-54-year-olds plan to travel over the holiday season. And while the dropping out of many lower-income travelers is concerning, the enthusiastic plans of wealthier travelers indicates that a year without travel did not dampen the desire to explore.

Travel options remain limited. Many international destinations are difficult or impossible to reach, and travel still feels unsafe to many, perhaps especially to older Americans and those with unvaccinated children. The darkest days of COVID-19 may be behind us, but the pandemic is still not in the rear view. If our findings at this moment are any indicator, the comeback has only just begun.



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Methodology note

A representative sample of 6,512 Americans took this survey. Of those, 2,759 qualified as travelers. A smaller subset of 1,501 who are staying in paid lodging, rather than only with friends and relatives, completed the longest version of the survey. Please refer to source lines for clarification on questions asked and sample sizes.

Throughout the report, readers will notice several references to travelers' longest trips. Because most travelers will take multiple trips across the season, including a mix of family visits, returns to traditional holiday haunts, and adventures in new destinations, we thought it would be useful to delve into travelers' longest trips involving a stay in paid lodging. We believe that patterns and trends in the longest trip provide deeper insight into travel decisions and purchase trends.



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Table of contents

Introduction	4
Holiday travel outlook	8
COVID-19 considerations	16
Travel products: Air, car, lodging, activities	20
Demographic trends	31
Travel's remote working opportunity	41



At a glance: Key findings



Cautious year for Americans over 55

While 42% of Americans will travel this holiday season, just 36% of Americans over 55 plan to take a trip. They are especially likely to cite health concerns for staying home. Those who *will* travel plan shorter and fewer trips compared with younger groups and will partake in local activities and attractions at a much lower rate.

For more, see slides 32, 37, and 38



Income divide deepens

Americans with household income greater than \$100K are almost twice as likely to be traveling this holiday season as those with incomes less than \$50K. And low-income nontravelers are three times as likely to cite financial reasons for staying home. High-income travelers are 2.5x as likely to increase their budgets versus 2019.

For more, see slides 32–36.



Travelers embrace vaccine requirements

58% of travelers say they would be more likely to fly if proof of vaccination is required, and only 16% less likely. This embrace of vaccine requirements is even stronger for high-income travelers: a full two-thirds would welcome vaccine requirements to fly.

For more, see slides 18–19.



Workplace flexibility adds to the travel pie

Flexibility to work remotely leads to more travel. 75% of travelers who plan to work during their trip are adding at least a day because of this ability. Working travelers also say they are taking additional trips due to workplace flexibility and are twice as likely as others to increase their budgets versus 2019.

For more, see slides 42–44.

Key findings

Holiday travel outlook

- Americans are hitting the road and heading to airports. 42% will travel between Thanksgiving and mid-January. Two-thirds of travelers will fly and/or stay in paid lodging, while one-third will only drive to visit friends and relatives.
- Most travelers say they expect to spend about the same on travel as they did in 2019, and one in five will spend significantly more. But 20% of Americans are making big cuts to their travel budgets compared with two years ago, up from 14% in summer 2021.
- For many, the holiday season means multiple trips to enjoy school or work breaks: Travelers are taking an average of two trips. For three in four, the longest trip will be a week or shorter. The season will get off to a fast start, with three in 10 trips slated for Thanksgiving weekend.
- For those not traveling, the pandemic is the biggest reason why. Concern about the health of loved ones and waiting for the pandemic to end are the top reasons to stay home, beating out financial concerns.

COVID-19 considerations

- Traveling Americans are not unconcerned about the pandemic. COVID-19 is a major factor in decisions across the travel journey. In destination selection, travelers are considering their vaccination status, local COVID-19 restrictions, and ability to avoid crowds.
- Most travelers embrace COVID-19 transmission mitigation measures. 64% are more likely to book a flight if masking is required; 58% say the same for proof of vaccination.
- Some are uncomfortable with these measures; 16% of travelers say a vaccine requirement would make them less likely to fly; 10% say the same for masking.

Travel's remote work opportunity

- The continuation of workplace flexibility continues to be a boon to travel. Three in four who plan to do some work on vacation are adding at least one day to their trips because they can work remotely.
- Remote working travelers are bigger consumers of every type of travel product and twice as likely to increase their budgets over 2019 compared with those who plan to completely disconnect.

Key findings

Demographic trends

- Leisure travel's return is uneven across income groups. Lower-income households are significantly less likely to travel this holiday season and almost 3x as likely to cite financial reasons for staying home. They also will take fewer and shorter trips. And compared with high earners, they are significantly more likely to cut budgets versus 2019.
- Travelers 55 years and older are exhibiting much more caution than younger travelers. Fewer are traveling at all, and their trips are shorter. Their in-destination activity participation levels are dramatically lower than younger travelers. And they point to pandemic concerns to explain their conservative plans.
- The vaccination status of children affects the holiday plans of many Americans. One in 10 Americans younger than 55 lists it as a reason to stay home and one in seven as a reason not to stay in paid lodging.

Travel products: Air, car, lodging, activities

- About twice as many travelers plan to road-trip (70%) as fly (37%). Drivers cite comfort and convenience as the top reasons, above health. Higher incidence of driving over flying strengthened compared with summer 2021, but this is likely a seasonal phenomenon.*
- Air travelers are avoiding layovers: Only 6% plan to take a domestic flight requiring a connection.
- Holidays are a time to connect with family, and this year is no exception. 60% will take trips involving a stay with friends or family. Slightly fewer (54%) will take a trip that involves staying at a hotel or private rental.*
- Travelers will continue their pandemic pattern of booking directly through travel suppliers over online travel agencies (OTAs) by a wide margin.
- Rental travelers are prioritizing space to share with loved ones and amenities for a longer stay. Those staying in hotels are motivated by brand trust, expectations of enhanced safety measures, and deals.

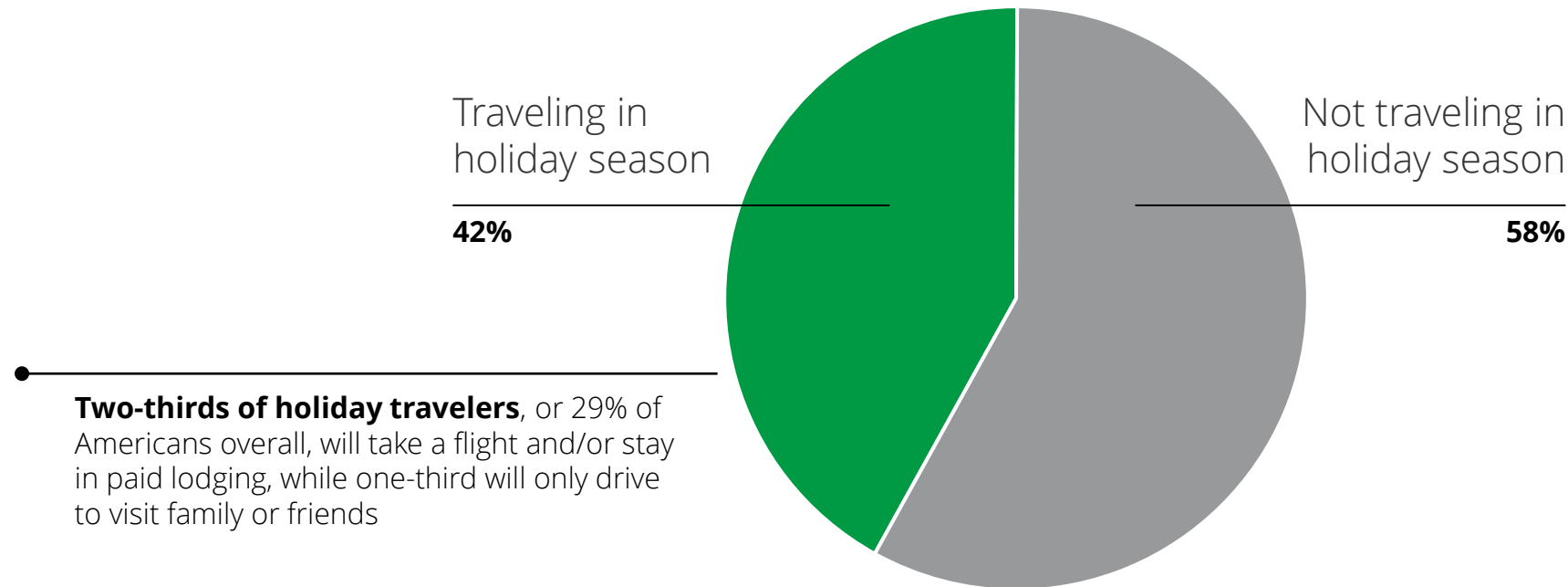
Note: *These data points based on select all question. See slides 21-22, 24-26 for more context on transportation and slides 21-23, 25, 27 for more context on lodging.

A man and a woman are sitting in the snow in a forest. The man, on the right, is wearing a grey knit beanie, a blue scarf, and a mustard-colored jacket. He is smiling and pouring coffee from a silver and blue thermos into a cup held by the woman. The woman, on the left, is wearing a yellow knit beanie, a white scarf, and a grey jacket. She is also smiling. A small campfire is burning in front of them. The background is a snowy forest with evergreen trees.

2021 holiday travel
outlook

42% of Americans plan to travel between Thanksgiving and early January; 29% will fly or stay in paid lodging.

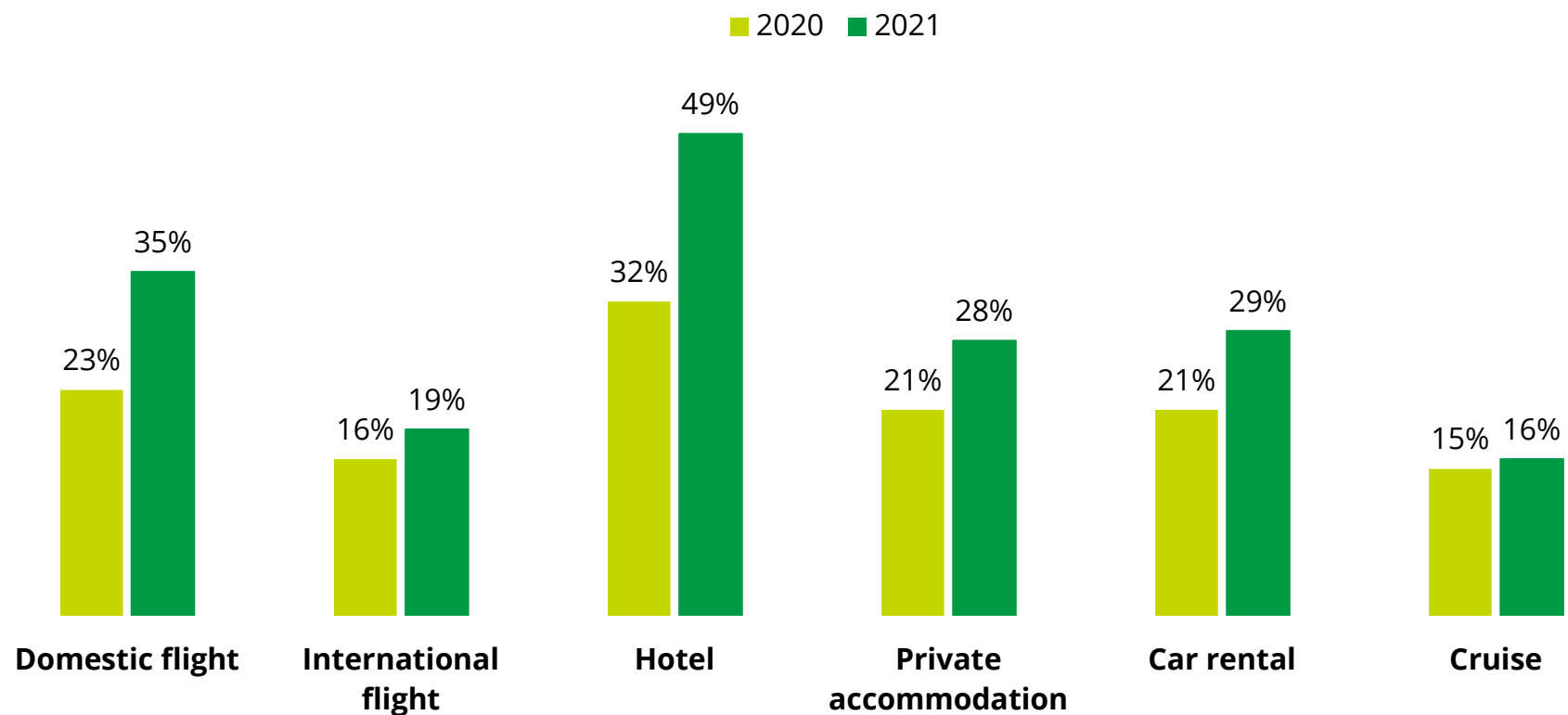
Share of Americans traveling this holiday season '21



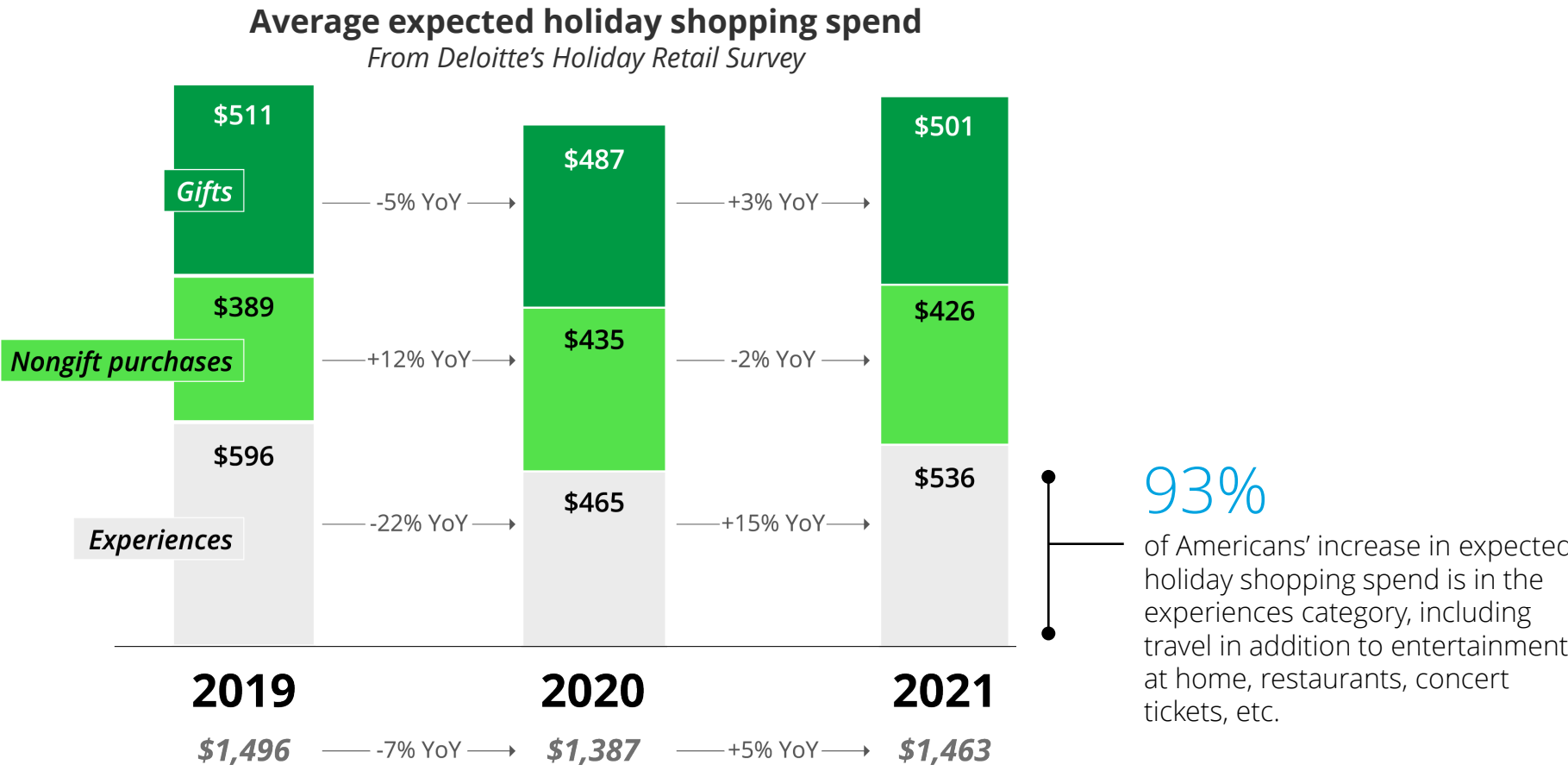
Travel intent is on an improving trajectory since vaccine rollout. The intent to fly, stay in hotels is up 50% from Sept 2020 to Sept 2021.

Americans who plan to purchase travel products in the next three months, September 2020 versus September 2021

From Deloitte's *Global State of the Consumer Tracker*



After falling dramatically in 2020, consumer spend on experiences is expected to come back strong in the 2021 holiday season.



Source: Deloitte's 2021 Holiday Retail Survey
Question: How much do you expect you will spend during the upcoming year-end holiday season on each of the following items?
Notes: Sample size (N)=4,410 (2019), 4,012 (2020) and 4,315 (2021). All dollar values are in US dollar.
*Experiences include entertainment at home and socializing away from home such as travel, hotels, restaurants, concert tickets, etc.

Tradition, need for rest, and postlockdown getaways are leading travel motivators. Health concerns continue to weigh on travel.

What motivates you to travel this holiday season?

- 1 Regular holiday travelers
- 2 Rest and relaxation
- 3 Need a postlockdown getaway
- 4 Reconnect with family and friends
- 5 Travel party is now fully vaccinated

Why are you not traveling this holiday season?

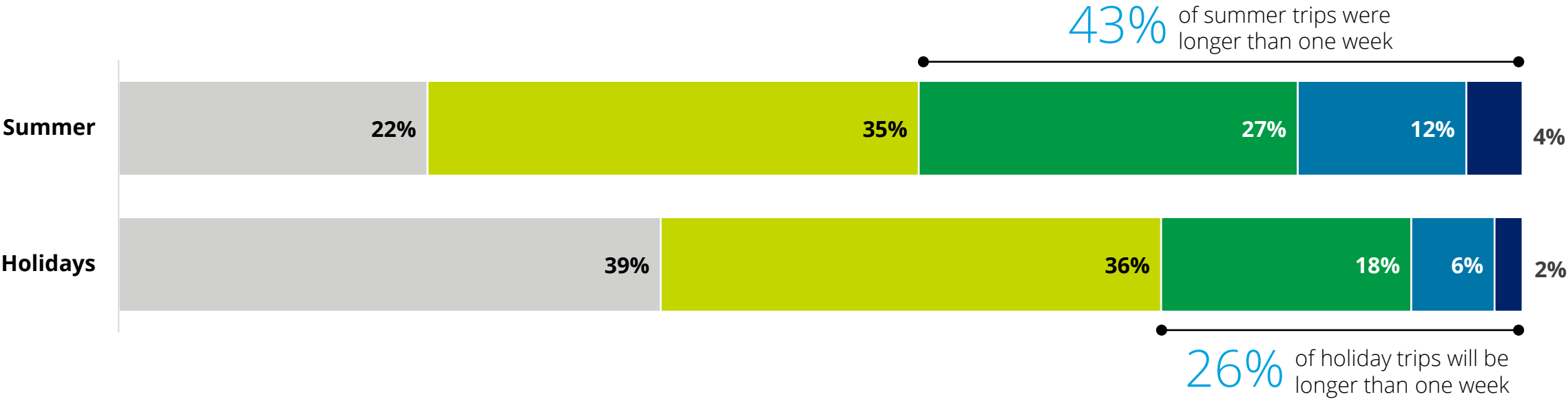
- 1 Concern about health of self, family, and those around
- 2 Waiting to travel postpandemic
- 3 Concerned about finances
- 4 Pandemic restrictions make it difficult to enjoy destinations
- 5 Traveled earlier in the year

Lower-income households (31%) are nearly 3x as likely to avoid traveling due to financial concerns compared with higher-income households (12%).

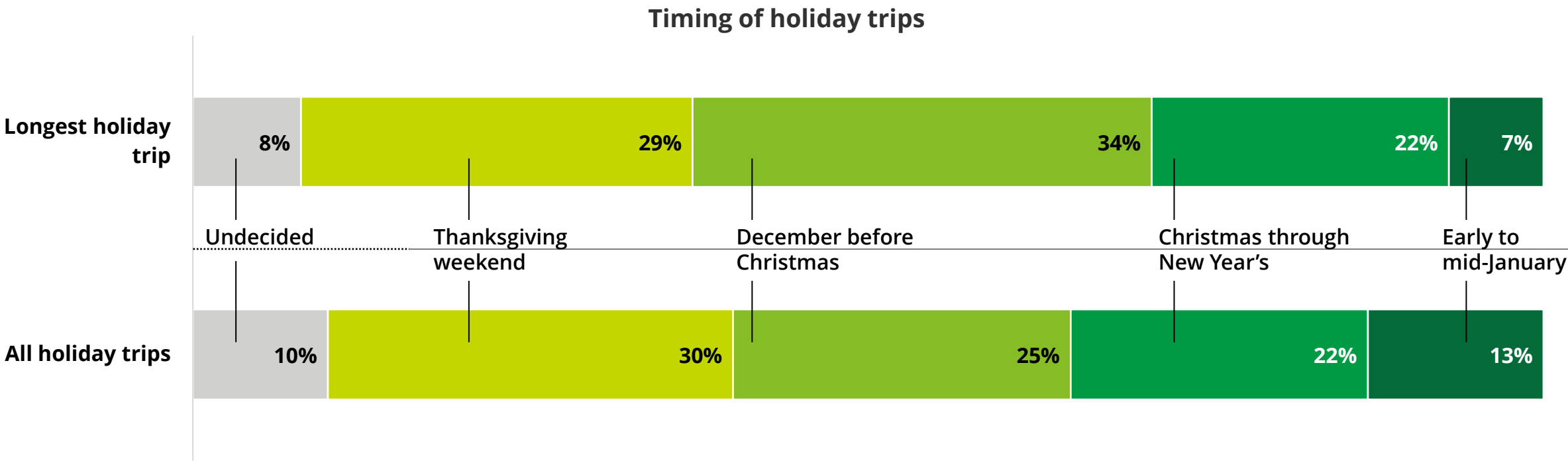
Holiday trips are shorter than in summer, attributable to seasonality. Four in 10 of the longest holiday trips will last less than a week.

Length of longest trip with paid lodging in 2021: Summer versus holidays

Less than 1 week 1 week 1-2 weeks 2-3 weeks Longer than 3 weeks



Fast start for holiday travel: Three in 10 trips start around Thanksgiving, but December is more popular for long trips.



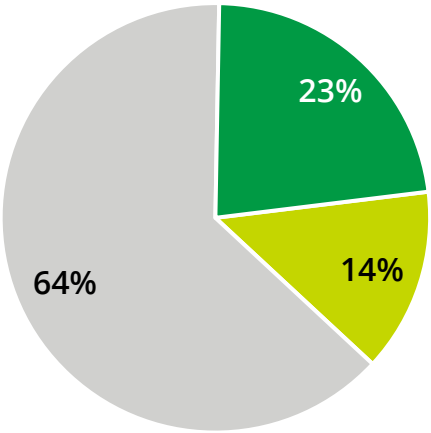
Source: Deloitte 2021 Holiday Travel Survey, N=2,759.
Questions: How many of your holiday trips begin in each time period?; In which time period does your longest trip this holiday season begin?

78% will spend as much or more than in 2019. One in five travelers to spend less, a drop in exuberance from summer 2021.

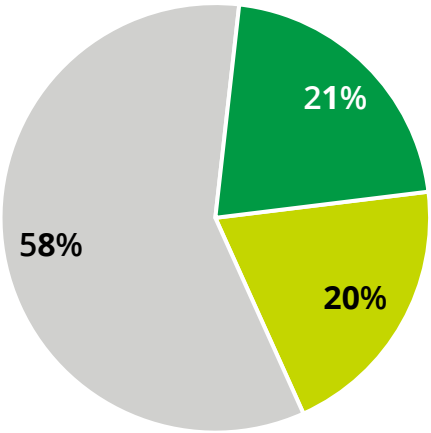
How do leisure travel budgets in 2021 compare with 2019?*

Significantly less About the same Significantly more

Summer leisure travel



Holiday leisure travel



Why spend more?

	Income level		
	Lower	Middle	Higher
Experiences more important now	36%	30%	31%
Accumulated savings	44%	27%	17%
Family need for space or comfort	8%	15%	25%
Leveraging WFH policies	8%	20%	21%

Why spend less?

	Income level		
	Lower	Middle	Higher
Concerned about finances	45%	42%	18%
Smaller budget due to previous trips	11%	12%	25%
Saving for future international trip	20%	22%	24%
Adjusted trip due to health concerns	18%	19%	24%

Source: Deloitte 2021 Holiday Travel Survey, N=1,501; Deloitte 2021 Summer Travel Study.
Note: Highlighted values in the tables represent a wide gap in reasons to increase or decrease spend by each income group.
*Among those who traveled during the season in 2019.

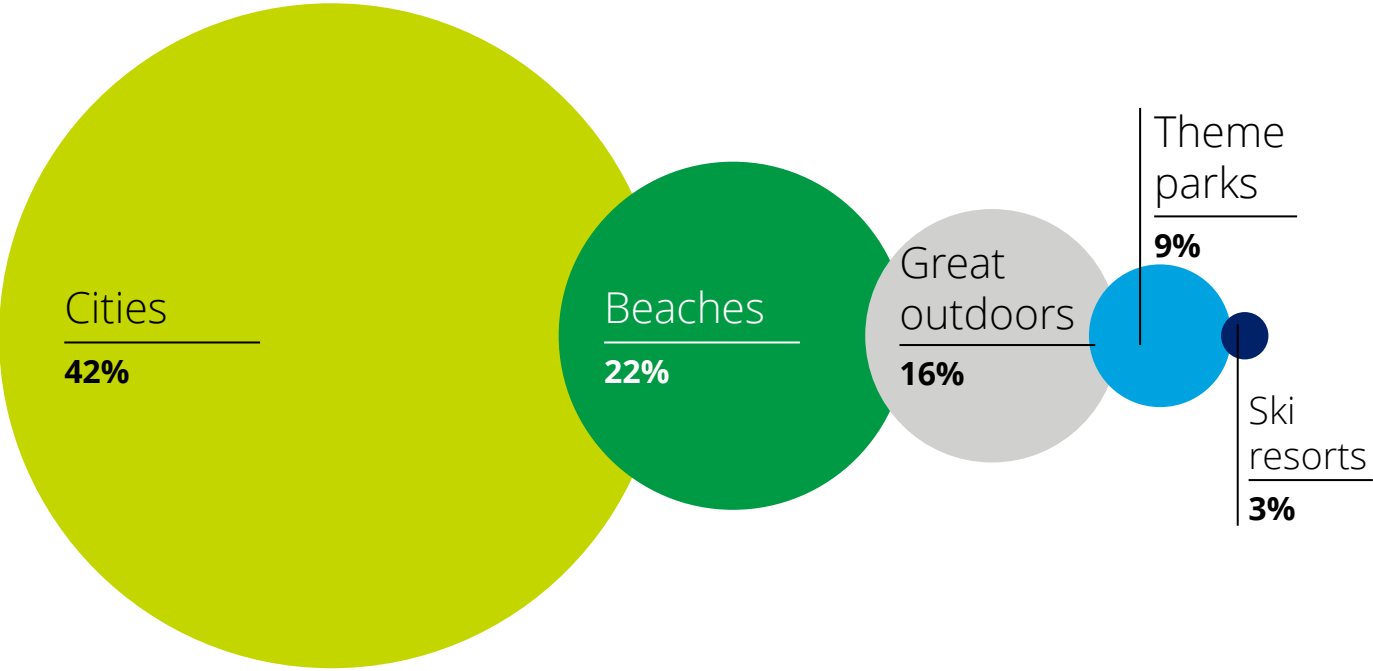
A woman with long blonde hair, wearing a white surgical face mask and a dark green puffer jacket, is looking down at her hands. She appears to be in a public transit vehicle, with red seats and vertical metal poles visible in the background. The text "COVID-19 considerations" is overlaid in white on the lower right portion of the image.

COVID-19 considerations

Family visits and weather push cities to top destination type. COVID-19 is a big factor in destination decisions.

Holiday season destination selection 2021

Where are people headed to on their longest trip this season?



Destination selection drivers

- 1 Vaccination status of the travel party
- 2 Destination's COVID-19 restrictions
- 3 Trip budget
- 4 Unique attractions or activities
- 5 Ability to avoid crowds

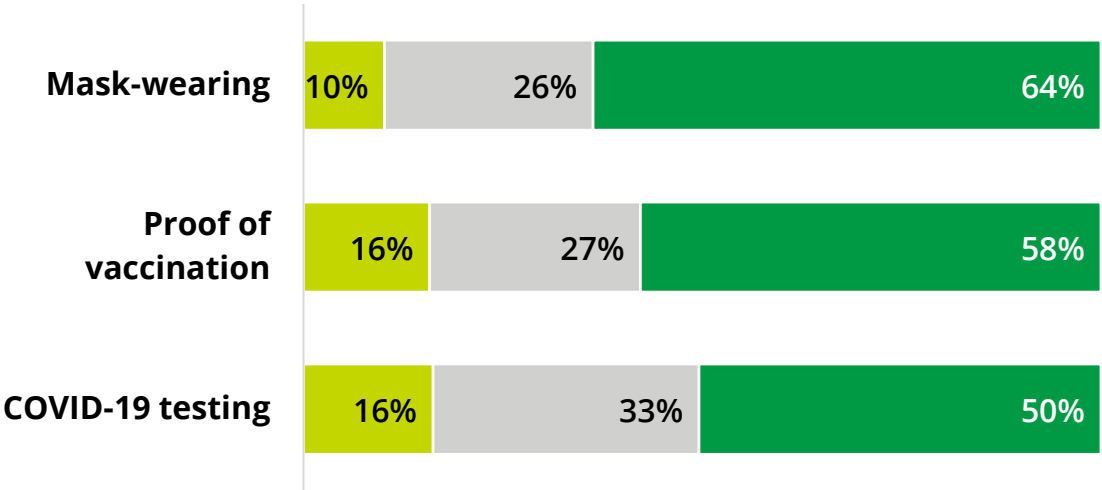
Source: Deloitte 2021 Holiday Travel Survey, N=1,501.
Question: Where are you headed for your longest trip this holiday season?; Which factors have influenced your destination selection?

More than half of travelers embrace masking, proof of vaccination, and COVID-19 testing.

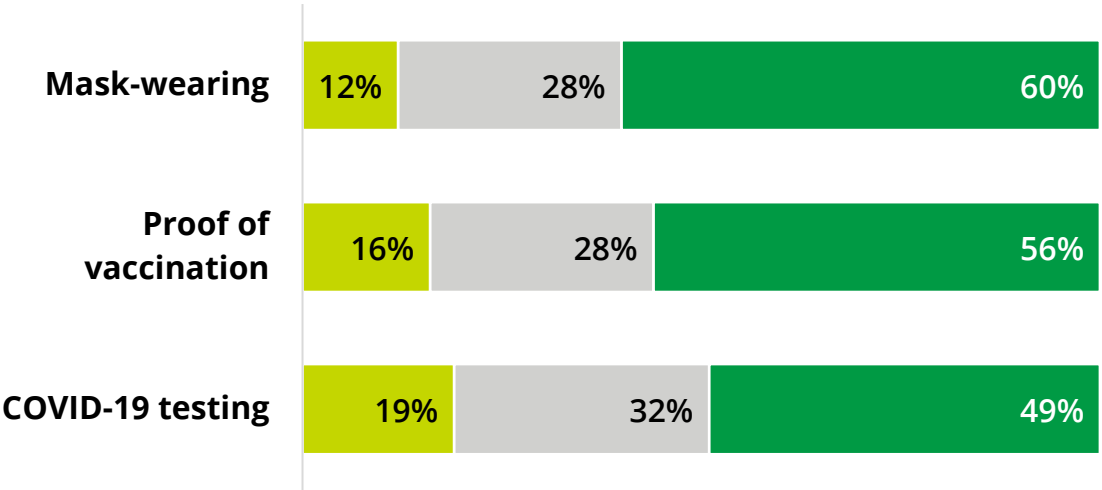
Would the following health screening requirements make you more or less likely to book?

Less likely Neutral More likely

Flights



Hotels



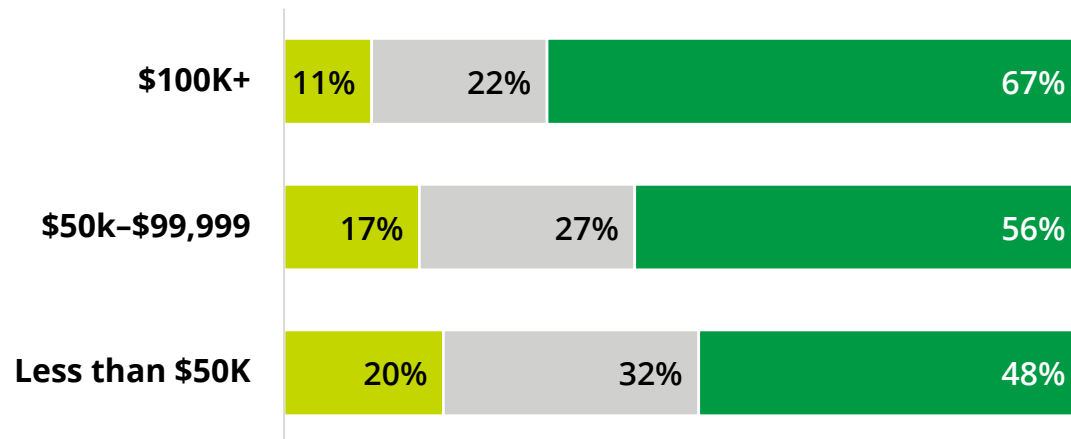
Source: Deloitte 2021 Holiday Travel Survey, N=2,759.
Question: Would you be less or more likely to make bookings if the following health screening measures were required?

Higher-income travelers especially embrace vaccine requirements to fly.

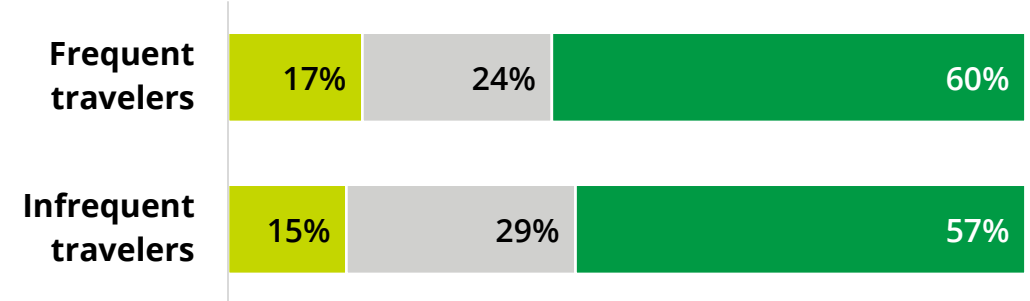
Would a proof of vaccination requirement make you more or less likely to fly?

Less likely Neutral More likely

By income



By travel frequency



Source: Deloitte 2021 Holiday Travel Survey, N=2,759.

Question: Would you be less or more likely to make bookings if the following health screening measures were required?

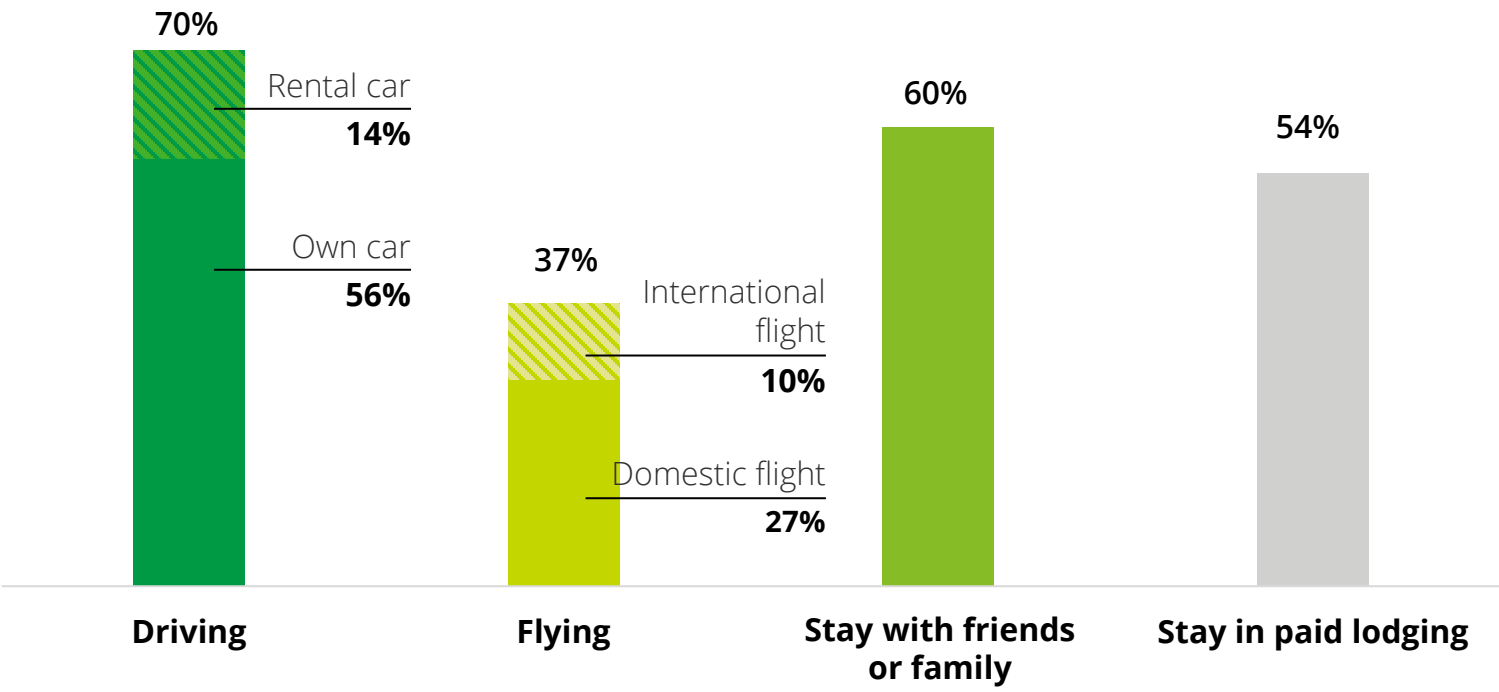
*Frequent travelers have taken three or more trips in 2021 prior to the holiday season; infrequent travelers took one trip.



Travel products: Air, car, lodging, and activities

Travelers will take an average of two trips this holiday season. Nearly four in 10 will fly, but many more will drive.

What does travel this holiday season include?

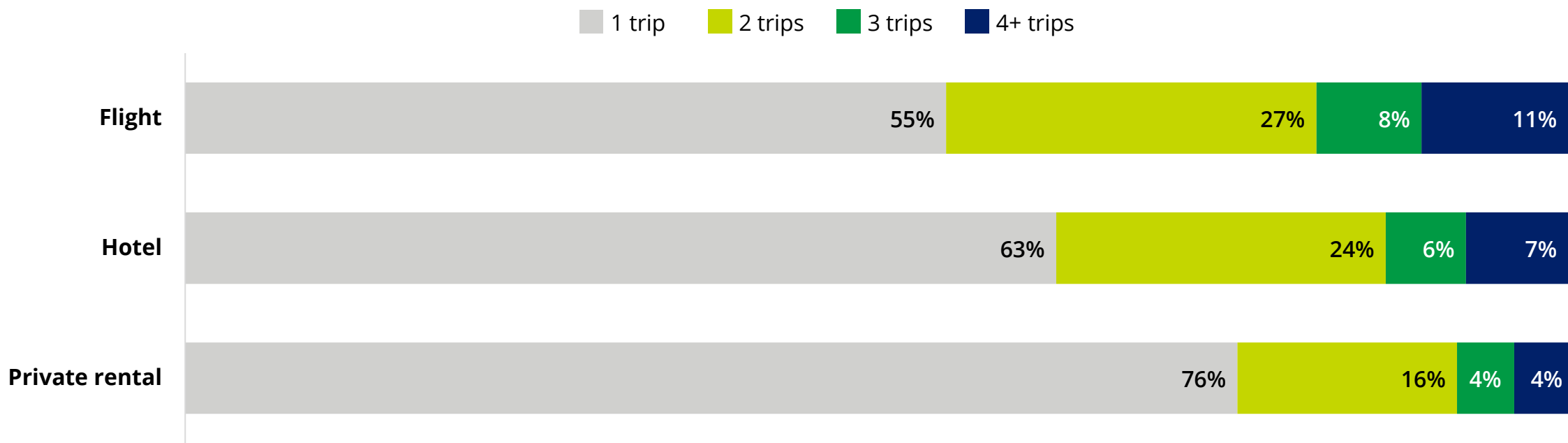


Source: Deloitte 2021 Holiday Travel Survey, N=2,759.
Questions: How many trips will you be taking this holiday season?; Across all your travels this holiday season, what travel products will you use?



45% of those who fly will do so more than once across the season, versus 37% planning multiple hotel stays.

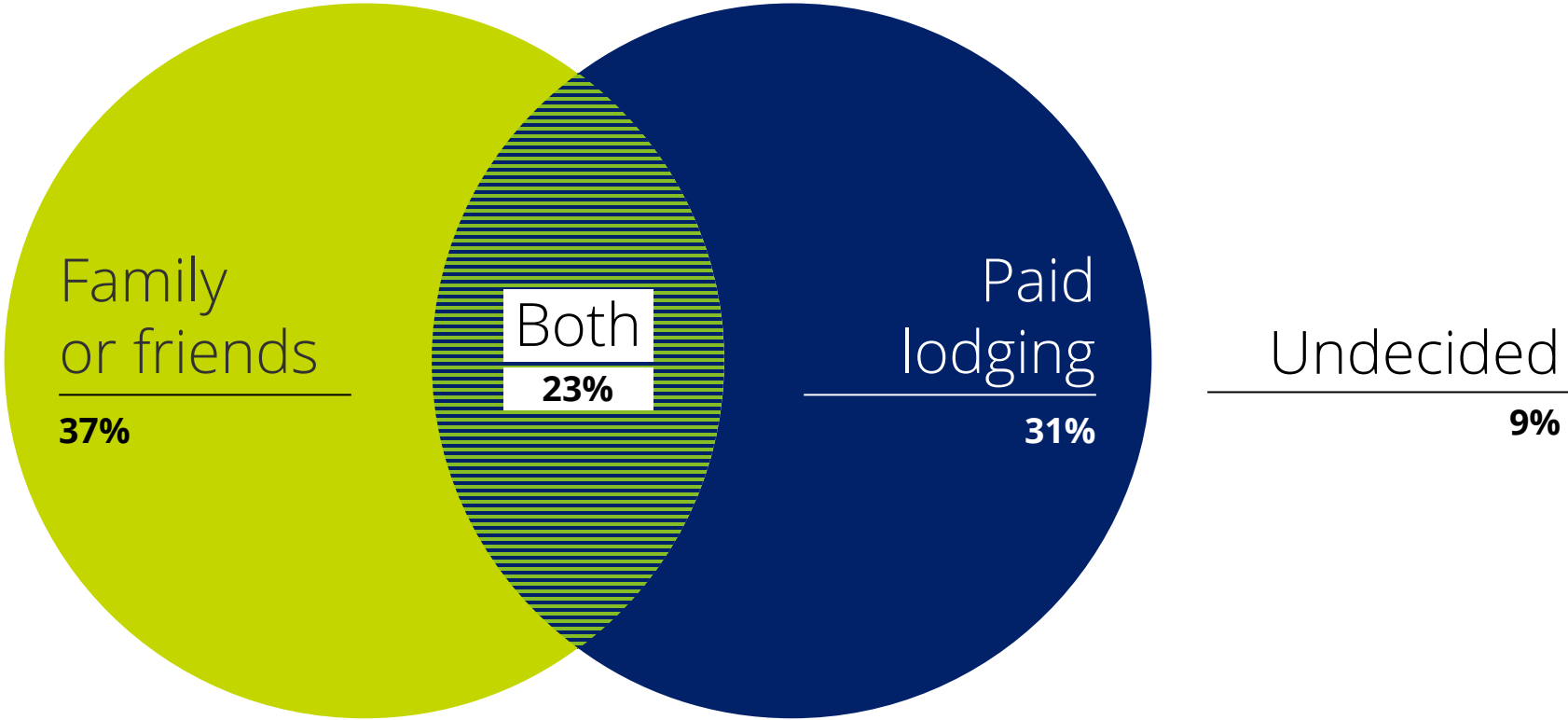
Of the holiday trips you take, how many will include the following travel product?



Source: Deloitte 2021 Holiday Travel Survey, N(flight)=1,027; N(hotel)=1,364; N(private rental)=485.
Note: The percentage values are proportionate to the number of holiday travelers that will take a trip involving the respective travel product.

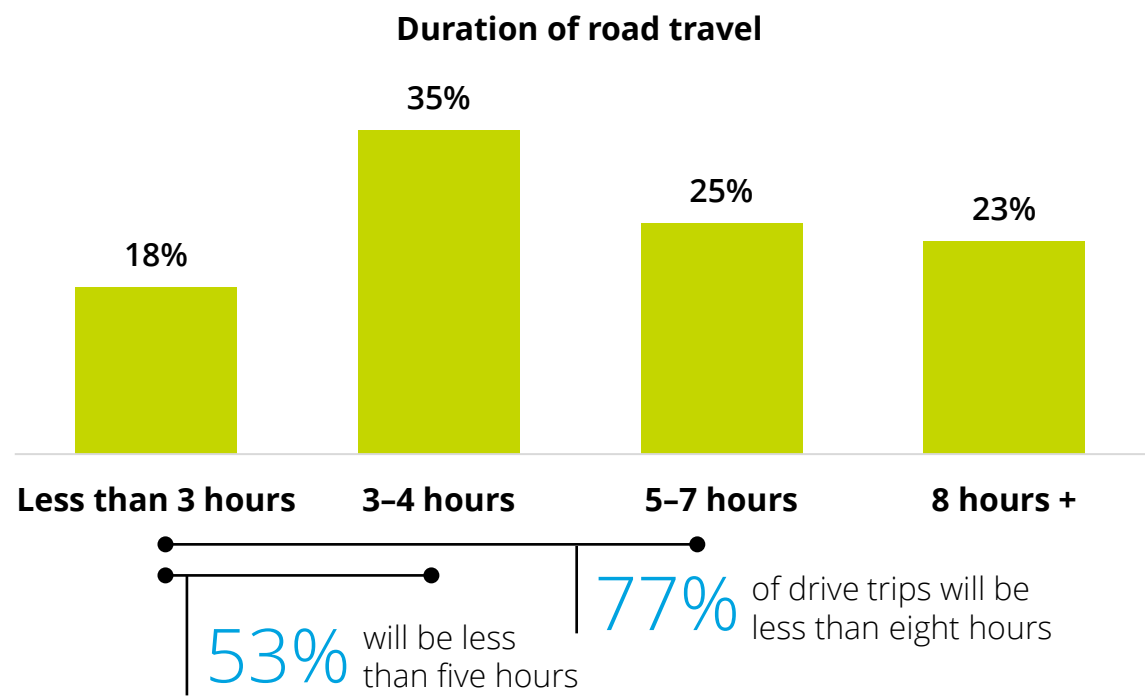
Six in 10 will stay with family or friends, while 54% will stay in paid lodging. About one in four travelers will do both across their trips.

Holiday season 2021: Accommodation split

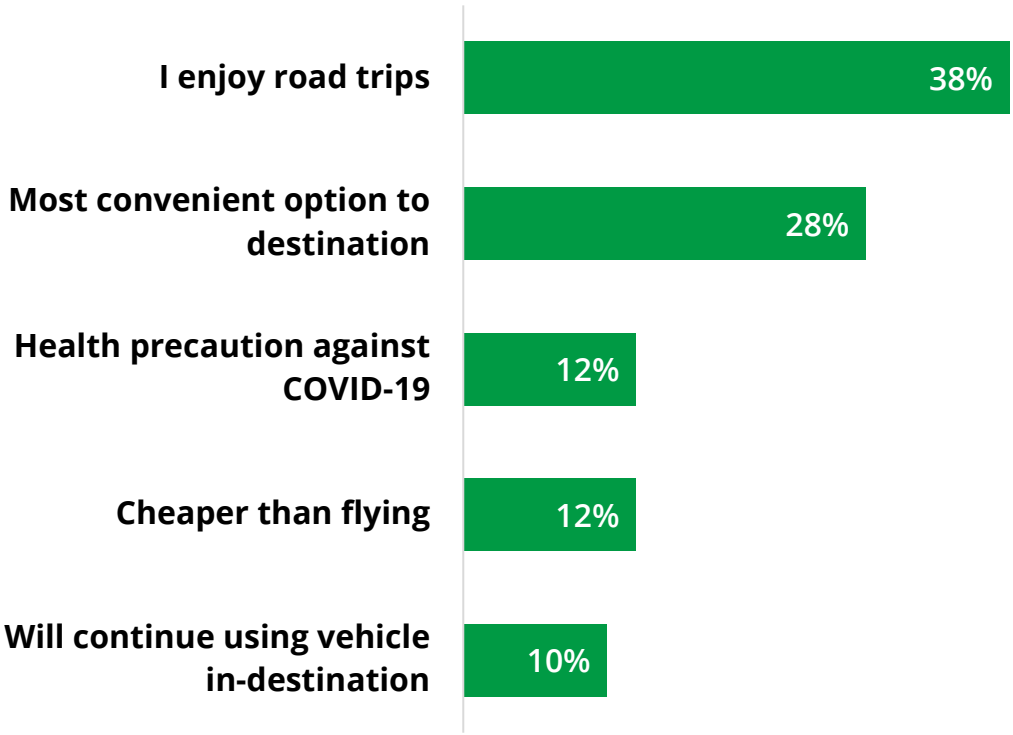


What motivates holiday road trips? Fun and convenience, not fear of catching COVID-19 on a flight.

The high share of travelers driving is likely normal seasonal behavior, as many will drive to visit family living a few hours away.

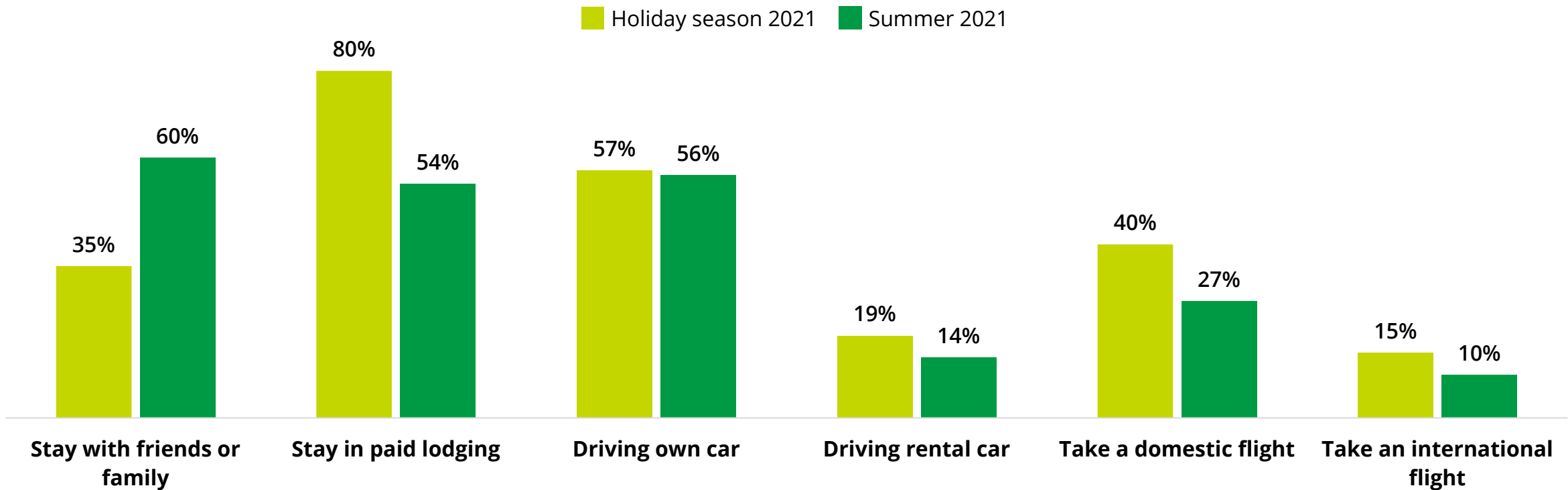


“Why do you plan to drive to your destination instead of taking a flight?”



Driving and visiting friends and relatives more prominent over holidays than in summer, when more can take longer trips.

How does holiday season travel product usage differ from summer 2021?



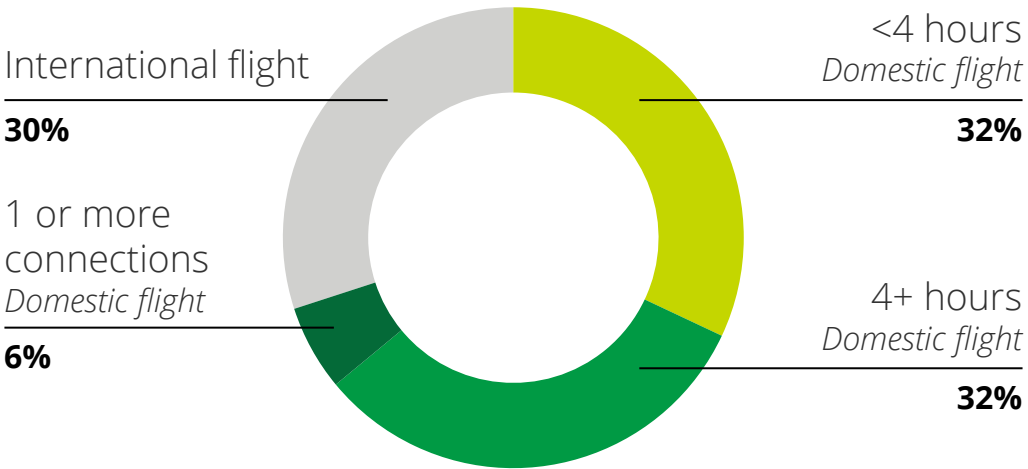
Source: Deloitte 2021 Holiday Travel Survey, N=2,759; Deloitte 2021 Summer Travel Survey.
Question: Across all your travels this summer or holiday season, what travel products will you use?

Nearly one in three will take an international flight, and more are saving up for one. Preference for direct flights increases.

Lower-income (Less than \$50K)	Middle-income (\$50K-\$100K)	Higher-income (More than \$100K)
20%	22%	24%

In a strong indicator of pent-up demand for international travel, about one in five who are decreasing their trip budgets compared with 2019 say they are doing so because they are **saving up for an international trip**. This pent-up demand is similar across income levels.

Leisure flight types for longest trip



Travelers taking a domestic flight with a connection dipped since summer 2021 (11%). Travelers appear to be limiting potential exposure to the virus and/or flight disruption.

Source: Deloitte 2021 Holiday Travel Survey, N=1,501, n(flight)=730; Deloitte 2021 Summer Travel Study.
Questions: Which of the following best describes your flight?
What best describes why you are spending less on this trip than you did on your longest holiday trip in 2019?

Private rental usage declines compared with summer, likely driven by seasonal shifts in trip characteristics.

2021 holiday longest leisure trip lodging

Hotels

83% of lodging customers will **stay at a hotel** for this trip

Top five motivators

Trust in property or hotel brand

Available amenities

Flexibility options (cancellations, etc.)

Enhanced safety measures (touchless tech, etc.)

Availability of better deals and discounts

Private rentals

16% of lodging customers will **stay at a private rental** for this trip

Top five motivators

Space to enjoy with family and friends

Available amenities

Trust in rental or the brand

Flexibility options (cancellations, etc.)

Length of the trip

Summer leisure travel

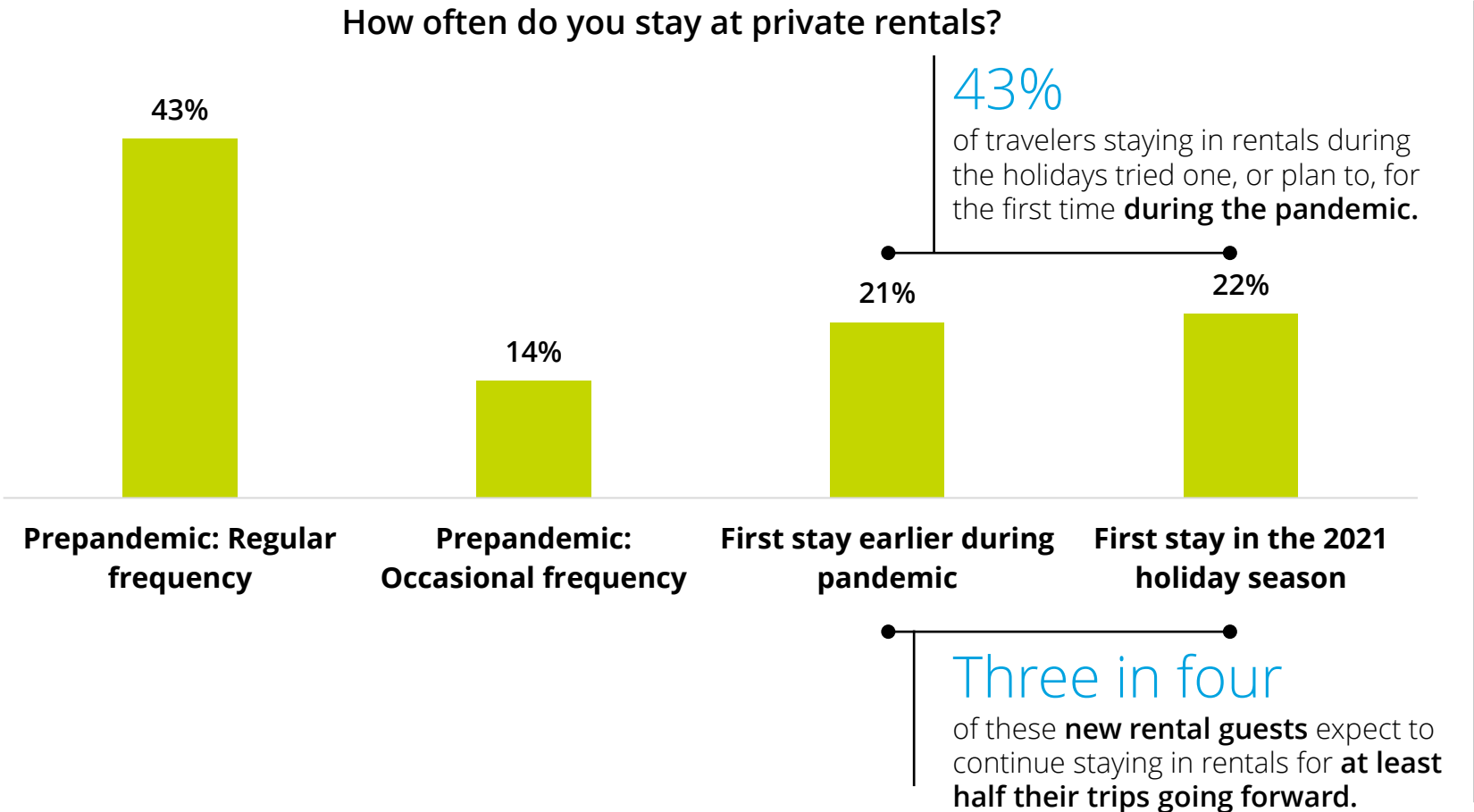
85% of lodging customers planned to stay **at a hotel**

23% of lodging customers planned to stay **at a private rental**

Compared with summer, fewer travelers will stay in rentals, and fewer will mix hotels and rentals within the same trip. With shorter trips over the holiday season and more visits to cities over beaches, private rentals play a smaller role this time of year.

Source: Deloitte 2021 Holiday Travel Survey, N=1,501; Deloitte 2021 Summer Travel Study.
Question: Which type of lodging are you planning to stay at or considering? (Select all that apply); For this trip, how have the following factors influenced your choice to stay at a hotel or a rental?

The pandemic continues to create new rental travelers who say they will likely continue staying at rentals in the future.



Holiday rental travelers by age and income

Age		
18-34	35-54	55+
33%	45%	23%

Income		
Lower	Middle	Higher
18%	38%	44%

In-destination activity intent is strong. Plans for ticketed events and classes are up slightly over summer.

2021 activity participation: Holidays versus summer

Interest in most travel activities is similar to summer. Outdoor activities, down 15% compared with summer, are a notable seasonally driven exception.

	Versus summer 2021
65% Dine at a restaurant	--
39% Visit a major attraction	(3%)
33% Adventure or outdoor activities	(15%)
29% Guided trips or sightseeing tours	(3%)
23% Ticketed or public events	3%
17% Small group or one-on-one classes	2%

Private experiences are important

Of travelers participating in guided day trips or group classes: 53% plan to book them as private experiences only.

Getting into the holiday spirit!

32% of vacationers plan to do some **holiday gift shopping** on their trips.

30% say they will **cook for family and friends**.

Source: Deloitte 2021 Holiday Travel Survey, N=1,501,
Question: Which of the following experiences are you likely to participate in on this trip?

Preference for supplier sites over OTAs* strengthens. Half of travelers have made no bookings for their longest holiday trip.

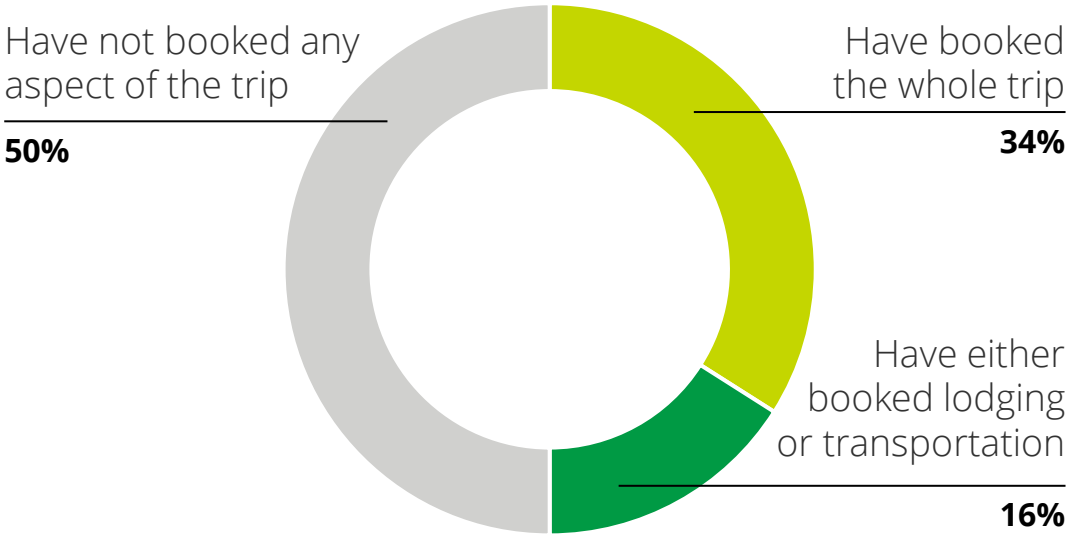
Booking channels

Air	Lodging
69% Airline websites	56% Hotel websites
18% OTAs	10% Rental websites
	12% OTAs

Key booking channel drivers

Deal-seeking and loyalty program membership are the top drivers of booking channel choice for both air and lodging. Ease of rescheduling and cancellation is another top driver.

Travel booking status



Source: Deloitte 2021 Holiday Travel Survey, N=1,501; N(Air)=730.
 *Online travel agency.



Demographic trends

Higher-income Americans are 1.7x as likely to travel this season.
Younger Americans are 1.3x as likely to travel as those over 55.

What proportion of the following demographic groups is traveling this holiday season?

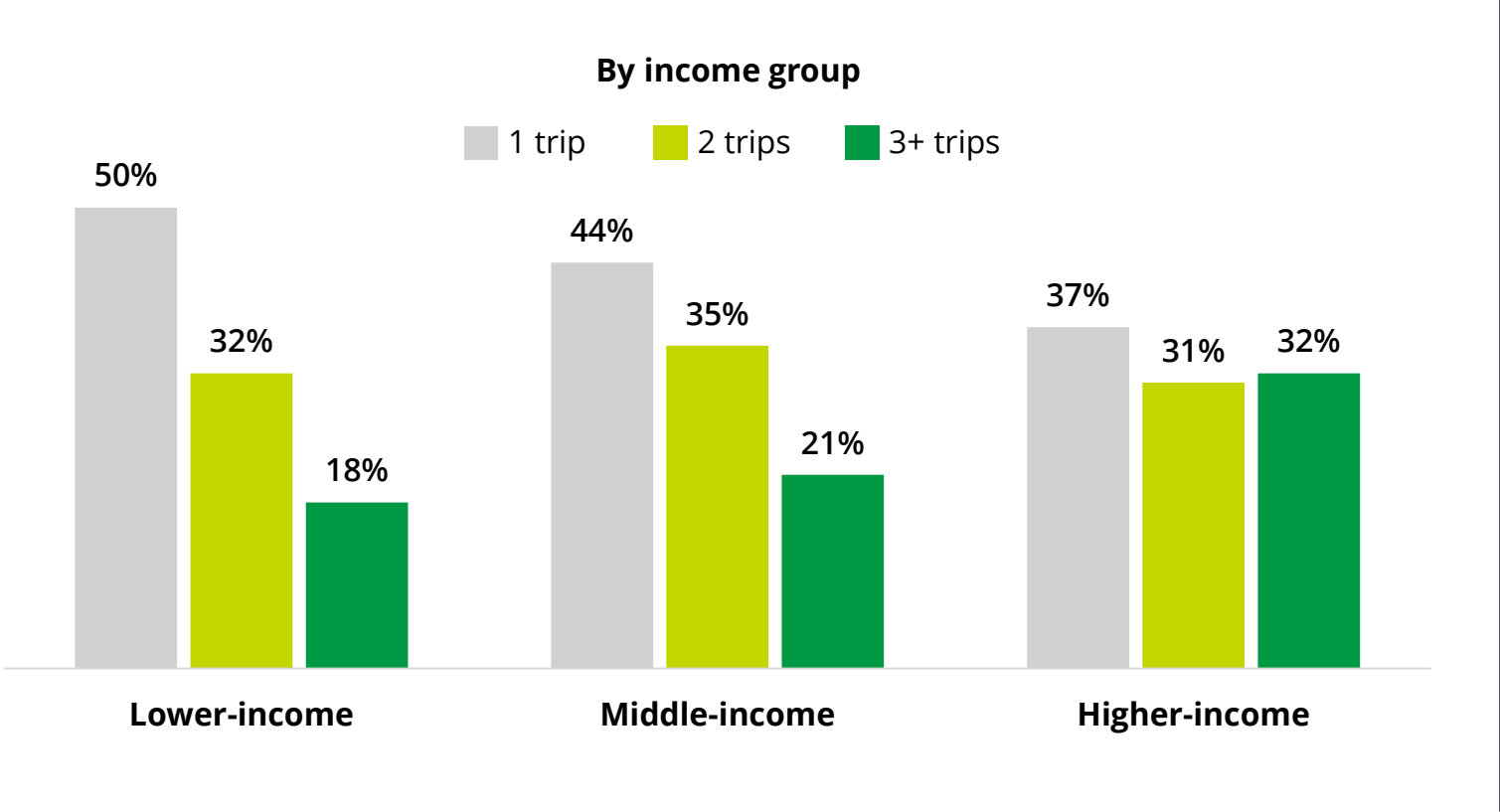
Income		
Lower <i>(Less than \$50K)</i>	Middle <i>(\$50K–\$100K)</i>	Higher <i>(More than \$100K)</i>
32%	46%	53%

Age		
18–34	35–54	55+
45%	47%	36%



One in three higher-income travelers will take three or more trips, compared to one in five lower- and middle-income travelers.

How many trips will you take this holiday season?



43% of travelers will take one trip

33% will take two trips

24% will take three or more trips

Higher-income travelers are more likely to stay in paid lodging and nearly twice as likely to fly. Drive trip incidence is equally distributed across income levels.

Across all your travels this holiday season, what travel products will you use?

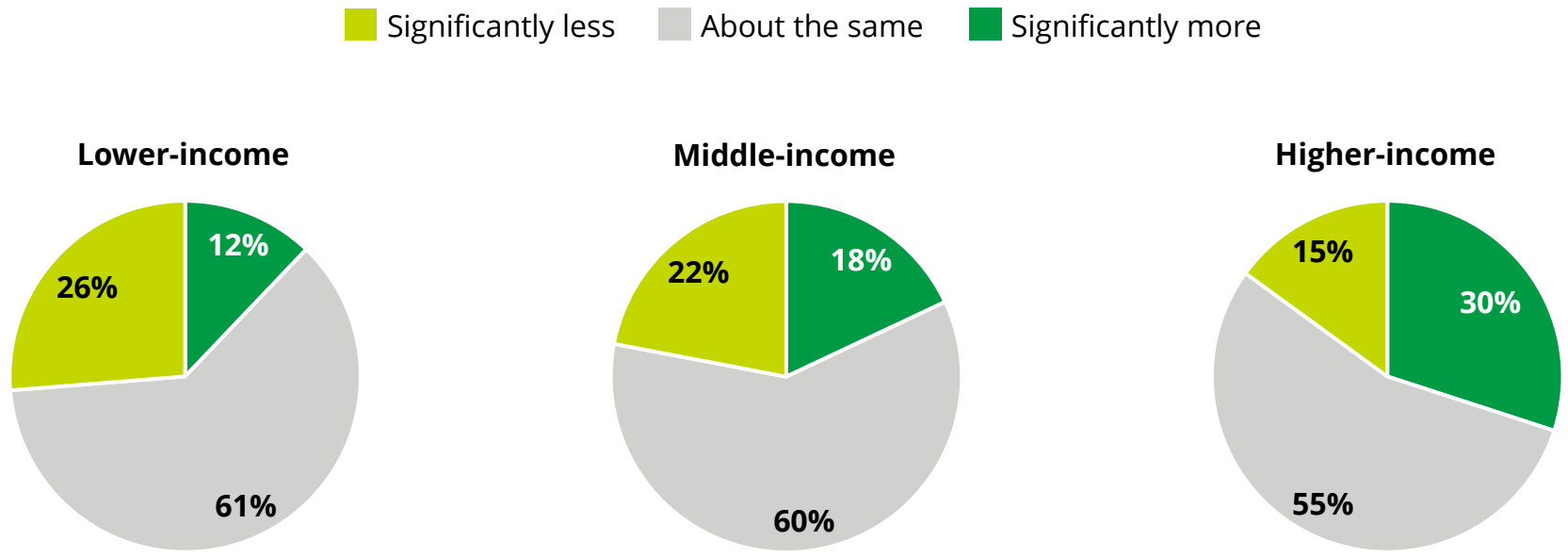
	Lower-income <i>(Less than \$50K)</i>	Middle-income <i>(\$50K-\$100K)</i>	Higher-income <i>(More than \$100K)</i>
Drive own car	56%	58%	55%
Drive rental car	12%	12%	17%
Stay with family or friends	67%	59%	56%
Stay in paid lodging	43%	56%	63%
Take a flight	26%	36%	48%

Source: Deloitte 2021 Holiday Travel Survey, N=2,759.

Question: Across all your travels this holiday season, what travel products will you use?

While one in four lower- to mid-income travelers pull back trip budgets versus 2019, higher-income ones are twice as likely to raise budgets compared with the rest.

Holiday season trip budget: 2021 compared with 2019*

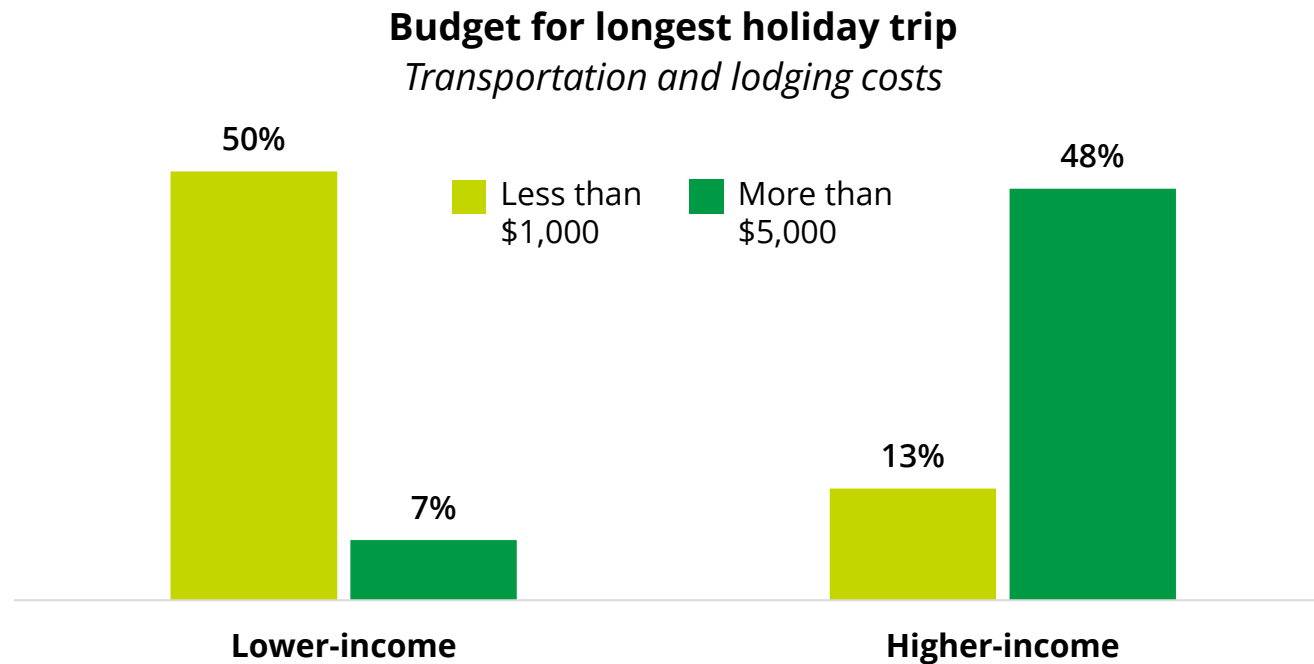


Source: Deloitte 2021 Holiday Travel Survey, N=1,501.
Question: How does your budget for this trip compare to the budget for your longest holiday season trip in 2019?
*Among those who traveled during the season in 2019.

Half of higher-income travelers will spend more than \$5,000 on their longest trip, while half of lower-income ones will spend less than \$1,000.

29% of travelers expect to spend **less than \$1,000** on transportation and lodging on their longest holiday trip.

29% **expect to spend more than \$5,000**. Spend intent varies widely by income group.



Travelers older than 55 are significantly more cautious.

36% of Americans older than 55 plan to travel compared to 45% of 18-to-34-year-olds. **Those that do are:**

Taking fewer trips

Average number of 2021 holiday trips	
18-34 years	2.7
35-54 years	2.4
55+ years	1.7

Traveling in smaller groups

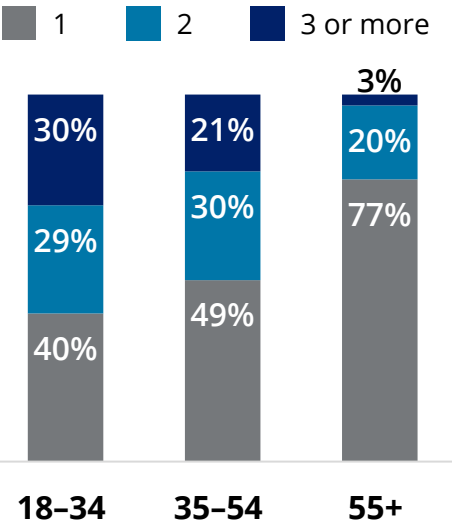
78% of travelers over 55 are either traveling alone or with one other adult, **as compared with 59% of 18-34-year-old travelers.**

Taking shorter trips

53% of travelers over 55 say their longest trip of the season will last less than a week, **compared with 31% of younger travelers.**

Less likely to fly

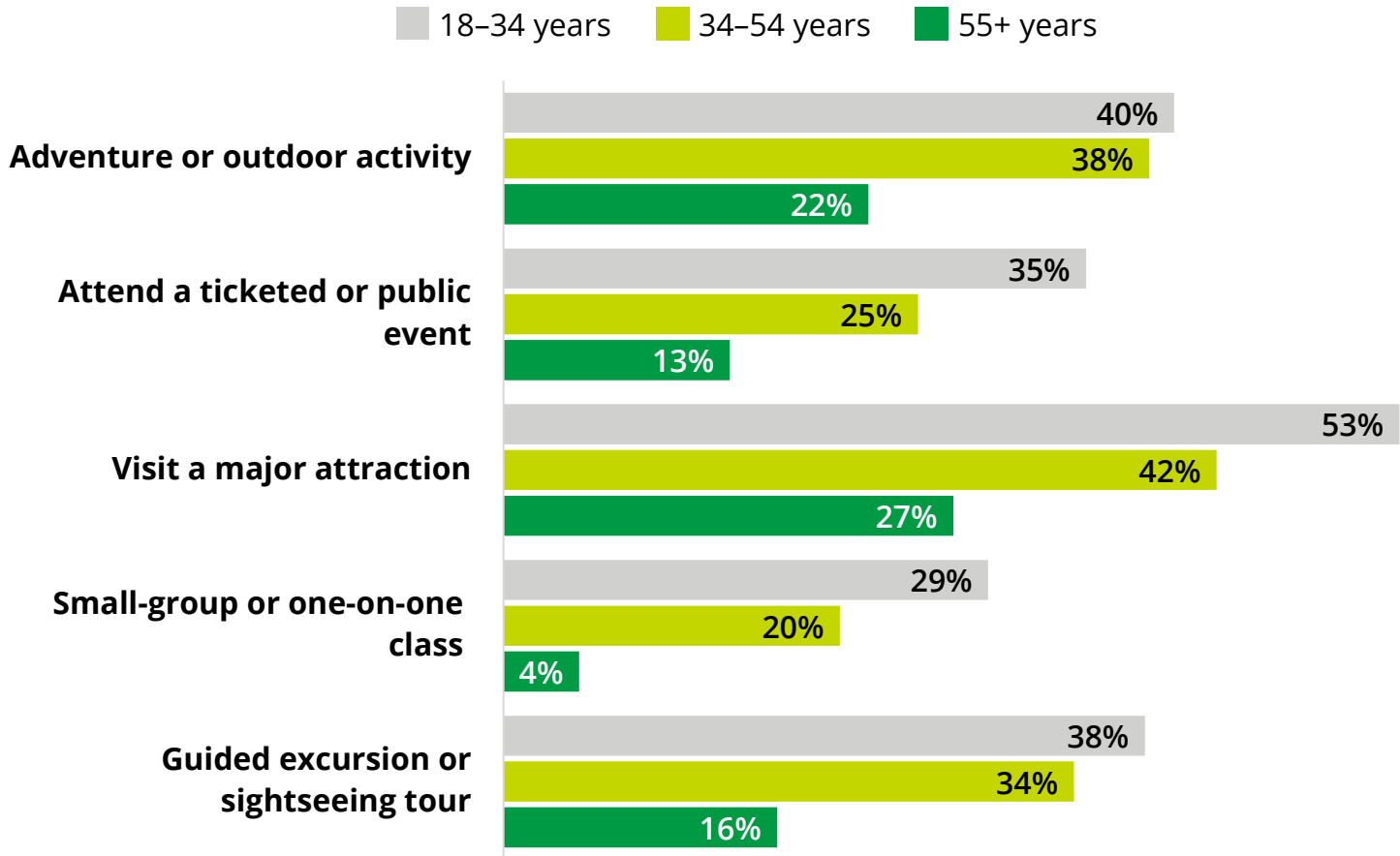
Of your 2021 holiday trips, how many include a flight?*



Source: Deloitte 2021 Holiday Travel Survey, N=534.
* The chart on trips including flights represents percentages based on those flying within each age group

Older travelers play it safe: less likely to participate in travel activities and experiences.

In-destination activity participation, by age



Source: Deloitte 2021 Holiday Travel Survey, N=1,501.
Question: Which of the following experiences are you likely to participate in on this trip? (Select all that apply)



Holidaying with children affects travel plans and decisions, especially for those younger than 55.

Share of Americans not traveling or not staying in paid lodging who cite unvaccinated children as a reason to curb travel plans

	Overall	<55 years	55+ years
Not traveling	6%	9%	1%
Not staying in paid lodging	12%	15%	3%

One in 10 travel parties this holiday season will include children, with **travelers younger than 55 4.5x as likely to travel with kids** compared with those older than 55.

Larger proportion of travel parties with children will have higher budgets for trip transport and lodging than the overall population.

Source: Deloitte 2021 Holiday Travel Survey, N=1,501; N=190.
Questions: Why are you not traveling?; Why are you unlikely to stay at paid lodging?; Who is in your travel party?; What is your estimated budget for transport and lodging?



The “where,” “why,” and “to do what” of holiday trips is centered around engaging activities for travel parties with kids.

Where?

Travel parties with kids select more activity dense holiday destinations like **theme parks (twice as likely)**. They are also less likely to visit cities than the rest.

Cities	33%
Beaches	22%
Theme parks	18%
Great outdoors	16%
Ski resorts	3%

Why?

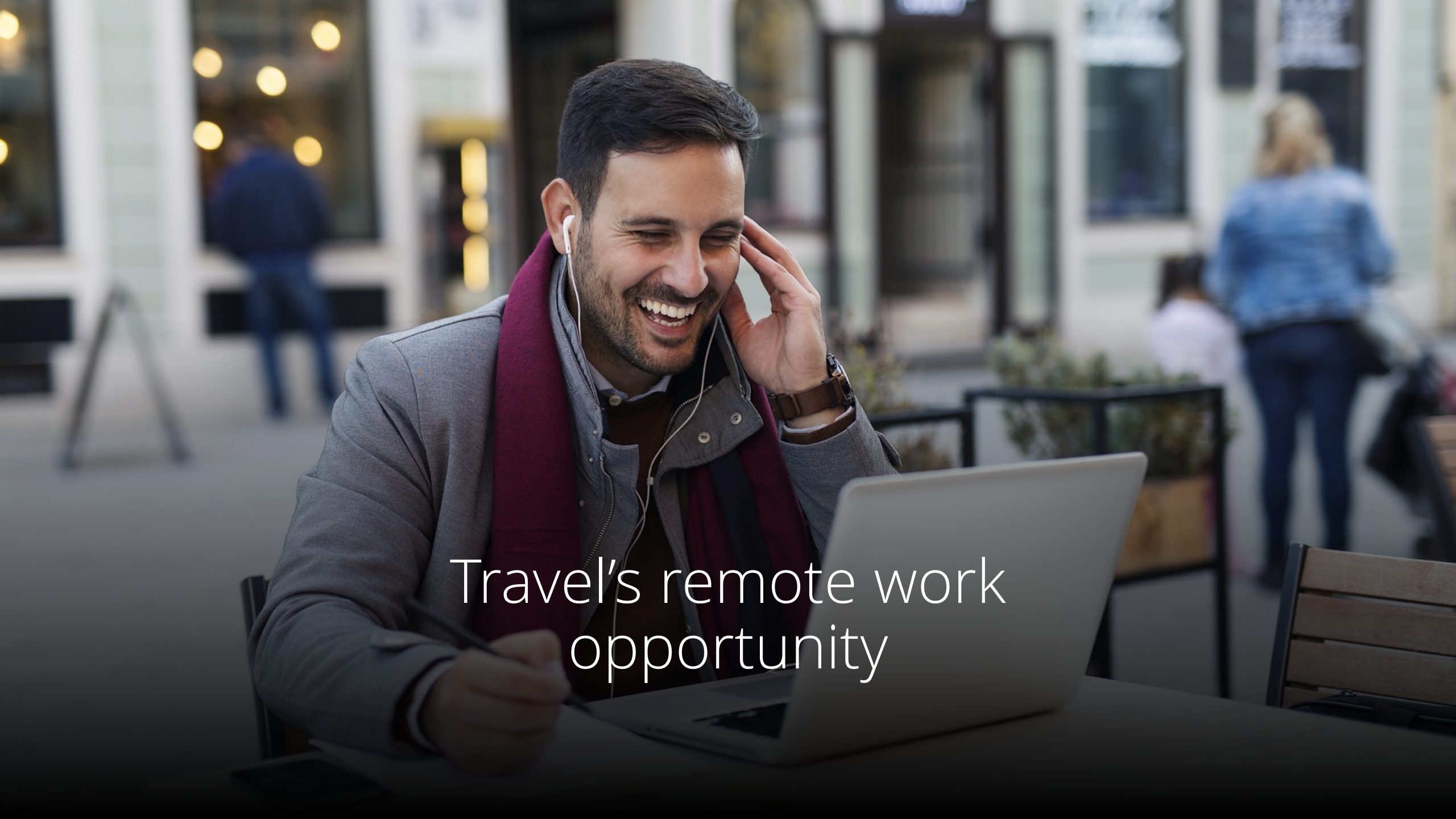
Traditional travel factors form the majority of key destination determinants, edging out COVID-19–related factors.

- **Trip budgets**
- **Unique activities and attractions**
- **Travel distance and time**
- Ability to avoid crowds
- Local COVID-19 restrictions

To do what?

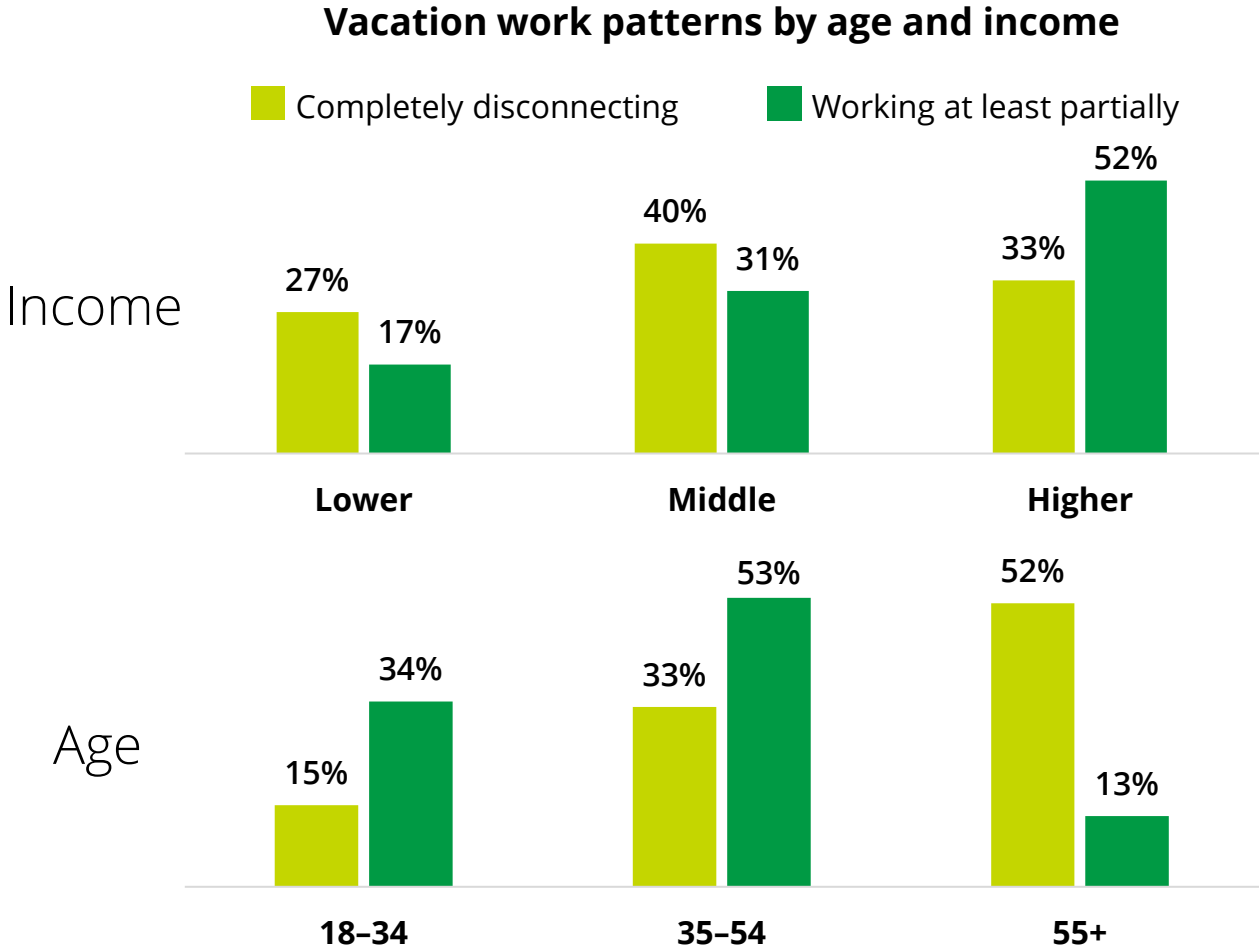
Travel parties with children are more likely to **engage in activities in public venues** than all-adult travel parties, as opposed to smaller-group, private events.

- Dine at a restaurant
- **Visit a major attraction**
- **Adventure or outdoor activity**
- Cook for family and friends
- **Holiday gift shopping**



Travel's remote work
opportunity

While most will completely disconnect, four in 10 travelers will work for at least part of their trip.

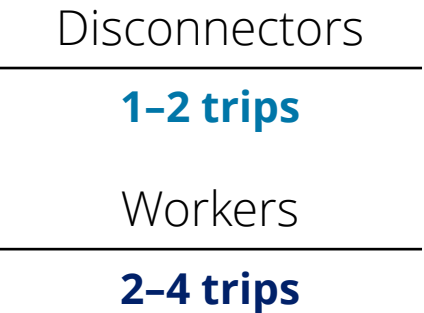


58% of travelers will refrain from working on their longest holiday leisure trip.

4/10 travelers will work at least partially on their trip.

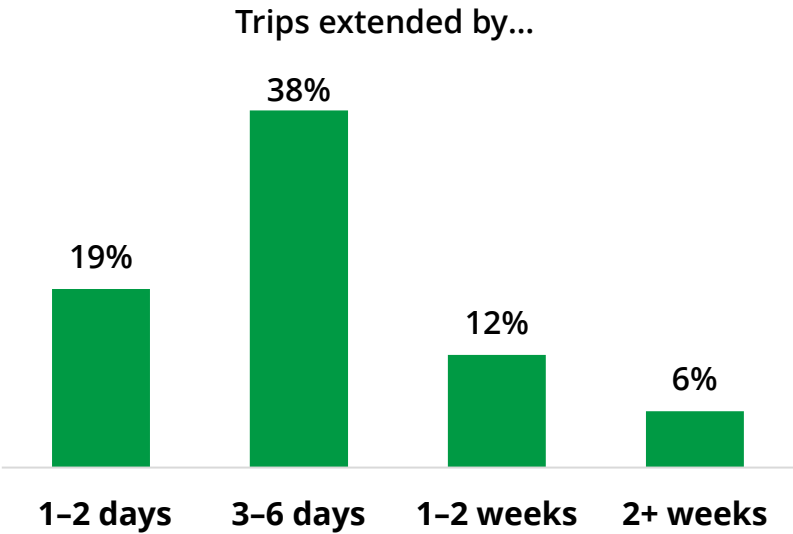
Blending travel and work means more trips and longer stays for working vacationers.

Working vacationers are taking **twice as many trips** this holiday season

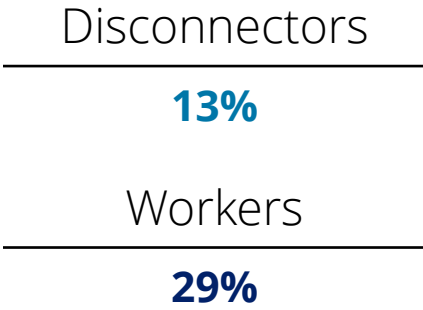


Those working attribute an average of two trips this holiday season to the ability to work remotely

Three in four working vacationers add at least a day, while more than half add three or more days to the duration of their longest leisure trip **due to remote working**



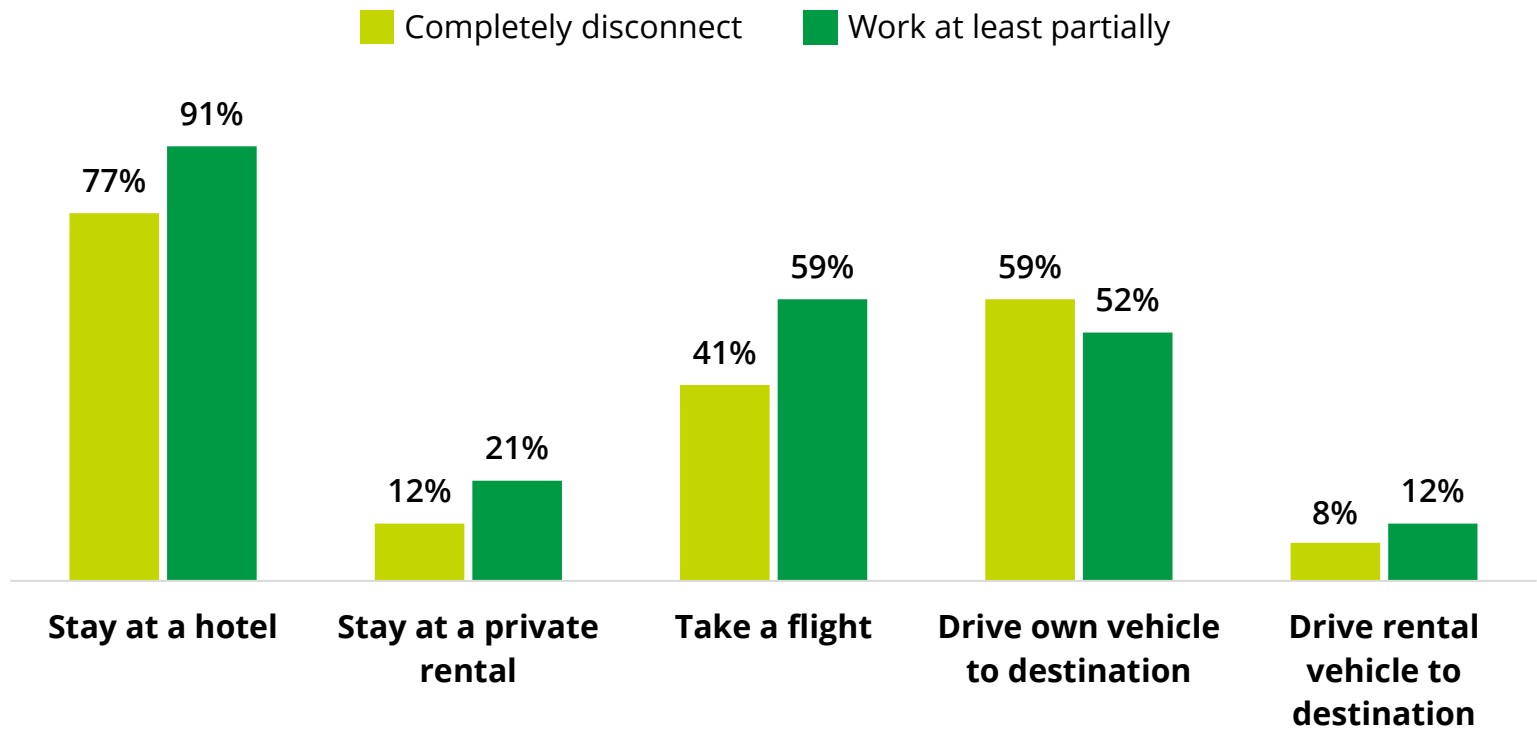
Working vacationers are more than twice as likely to **increase the budget for their leisure trip** as compared with 2019



Those working cite leveraging their company's WFH policy as a key driver of increased trip budgets

Holiday season work patterns affect travel product adoption

On your longest leisure trip this holiday season, will you...?



Source: Deloitte 2021 Holiday Travel Survey, N=633.



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Insights



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