

# 2023 Deloitte holiday travel survey

Winter wanderlust shows Americans still  
place high value on travel



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# Executive summary

The 2023 holiday season appears set to be a busy one in airports and hotels, as nearly half of Americans plan to travel. Concerns about health and finances deter fewer from travel this year. Worries about flight delays and cancellations persist among some, but fewer cite them as a reason to avoid travel.

Intent to travel between Thanksgiving and mid-January is up across all age and income groups. While reconnecting with friends and family remains paramount to travel during the holidays, fewer Americans are restricting their travel to visiting loved ones. The share of travelers planning to stay in hotels has surged to 56%.

Hotels, airlines, and other travel suppliers will be happy to welcome back baby boomers this year. This group has generally shown more hesitancy than younger travelers since 2020, but boomers are back in big numbers, accounting for about a third of the traveling public during the 2023 holiday travel season. Gen Z accounts for a smaller share, as many are still under 18, but this younger generation is leading shifts toward social media and social consciousness in travel.

Finally, “revenge travel” may be fading, but in its place, the recent restricted years seem to leave behind a legacy of enthusiasm for exploration. Among the 5% of Americans planning international trips, a greater number intend to visit South America and Asia, although the Caribbean, Mexico, and Europe remain the most popular destinations.

As the travel industry prepares for a busy holiday season, the time has never been better to deliver great experiences—and to deliver travelers to their destinations on time. Many indicate they have more trips in mind for the coming year. And as ever, the travel brands that help them make the best memories will be remembered and trusted as Americans ask themselves, “Where to next?”

# Key findings

## Travel plans clear for takeoff

48% of Americans intend to travel over the holidays, up over 31% in 2022 and continuing a pattern of increasing travel intent that was also observed in summer 2023.

Two major barriers to travel have declined significantly: In 2022, one in five nontravelers cited health worries or concerns about delays and cancellations as their reasons for staying home. This year, that dropped to one in 10.

Intent to travel is up across the board, but it is poised to especially be felt by hotels, as 56% of travelers plan to stay in one at some point during the season. Intent to fly is up as well, with a shift to more domestic trips compared to 2022.

## Boomers back big time

Boomers are bringing a big boost to travel this season. They constituted just one-fifth of the traveling public over the holidays in 2022; this year, that will be close to one-third. Boomers' planned spend and number of trips indicate a conservative approach, but they are embracing travel.

Additionally (and promisingly), many boomers say they are holding back their spending over the holidays so they can travel at a different time. Overall, they appear poised to travel enthusiastically during the holidays and beyond.

## Gen Z leading shifts in shopping and social consciousness

Although Gen Z still accounts for a small share of trips (8% of 2023 holiday travelers are Gen Zs), its influence on travel trends is increasing.

Gen Z travelers plan an average of 2.1 trips over the holidays, a close second to millennials at 2.2. One in four say they will significantly increase their budgets versus 2022, the highest portion of any generation.

This age group is leading a major shift in travel planning—42% say they will use short social video apps to help plan their trips, versus just 14% of travelers in older generations.

## Some pandemic trends fade, but others show staying power

With travel less affected by COVID-19 concerns, which patterns that prevailed in 2020 are persisting and which are fading?

“Revenge travel” appears to be fading, as fewer Americans cite “making up for trips lost due to pandemic” as a travel motivator. But some signals also indicate a boost in enthusiasm for travel after three years of restriction. Intent to stay in hotels is up, and international destinations are poised to be farther flung.

A trend that persists is laptop lugging—about a third of travelers plan to work at least partially during their trips. These travelers skew young and high income. And far from working stiffs, they express high intent to engage with destinations.

# Holiday travel behavior

Americans are embracing their wanderlust this winter, as nearly half plan to travel. While reconnecting with family is a strong driver, more Americans plan vacations that involve staying in hotels or private rentals, instead of just visiting loved ones.

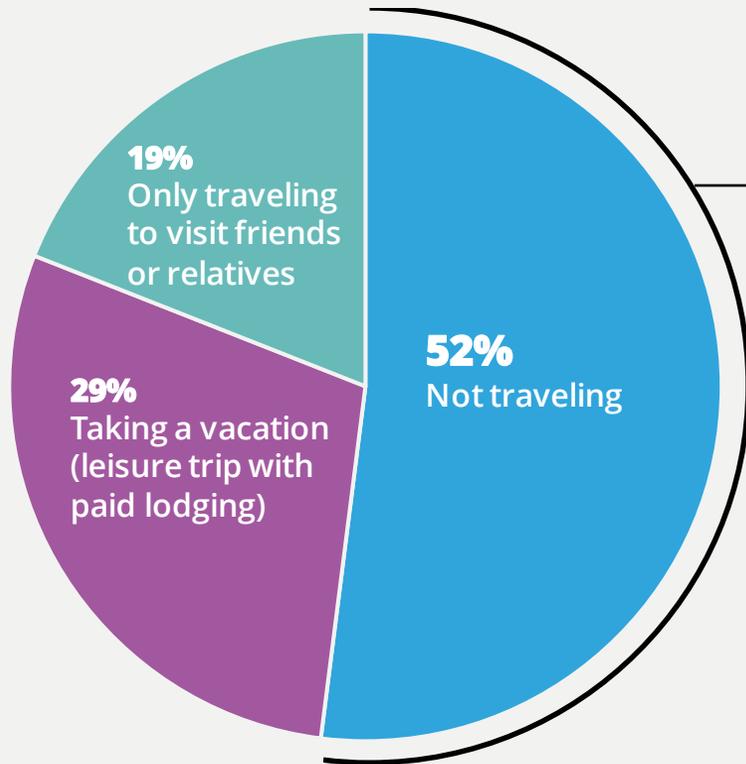
*Greetings from:*



2023

# Nearly half of Americans plan to take at least one trip during the 2023 holiday season

Concerns about health and trip disruption—major travel deterrents in 2022—have declined significantly, allowing more Americans to feel confident about booking trips this holiday season.



2023 holiday travel plans

Key reasons for not traveling	2023	2022	2021
Cannot afford it	38%	37%	24%
Travel is too expensive right now	32%	NA	NA
Rather spend on other things	23%	30%	12%
<b>Concerned about travel disruption</b>	<b>11%</b>	<b>18%</b>	<b>NA</b>
<b>Concerned about health risks</b>	<b>11%</b>	<b>18%</b>	<b>45%</b>

Concern about health risks was a huge travel deterrent in 2021. In 2022, although health concerns declined, many chose to stay home due to fear of delays and cancellations.

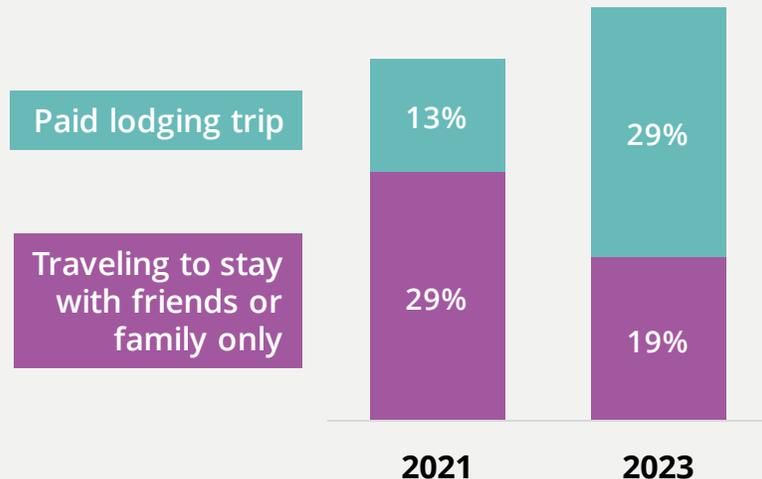
In 2023, concerns about health and trip disruption have halved as travel deterrents.

Questions: (1) What activities are you planning to partake in during the 2023 holiday season (between Thanksgiving 2023 and mid-January 2024)? (2) Why are you unlikely to travel this holiday season?  
Note: N = 5,281.

# Most travelers plan trips including paid lodging, versus exclusively staying with friends or family

Intent to travel continues to climb as Americans put a high value on experiences after years of more limited travel due to the pandemic. The share of Americans planning to stay in hotels and private rentals has more than doubled compared to 2021, when many were limiting exposure to strangers.

Americans staying in paid lodging versus with friends and family only



Who plans to stay in hotels and rentals over the holidays?

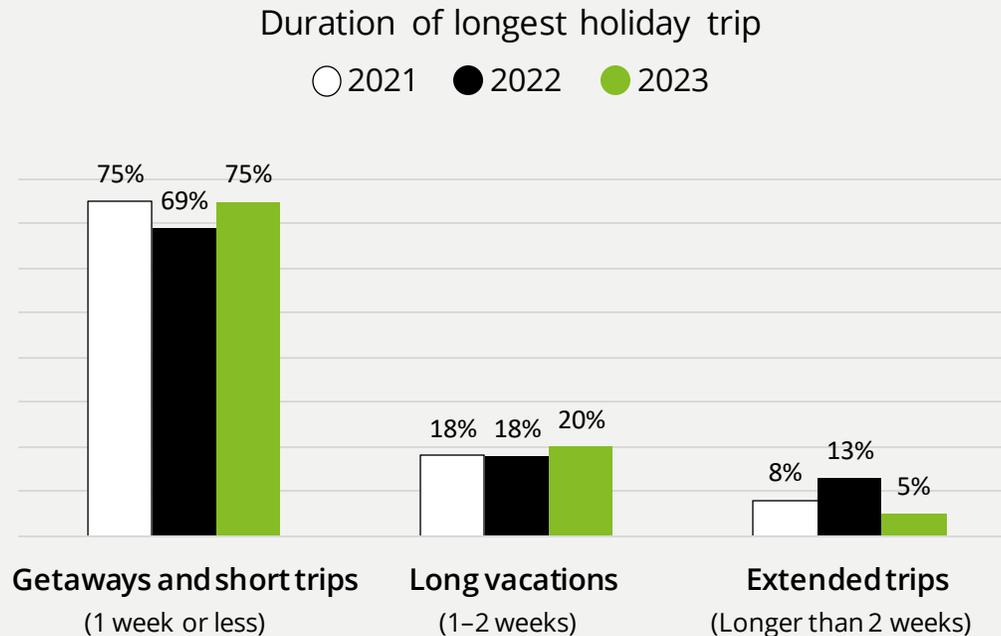
	2021	2023
<b>Generations</b>		
Gen Z	21%	28%
Millennials	28%	34%
Gen X	25%	30%
Boomers	21%	24%
<b>Income groups</b>		
Higher income	34%	41%
Middle income	27%	33%
Lower income	15%	18%

Paid lodging intent is up across generations and income groups, especially among Gen Z and millennial travelers, and among the higher- and middle-income groups.

Question: What activities are you planning to partake in during the 2023 holiday season (between Thanksgiving 2023 and mid-January 2024)?  
 Note: N = 2,531.

# Holiday travel budgets are healthy, despite a slight dip in trip length and frequency

While more Americans intend to travel, they will take fewer and shorter trips compared to 2022.



**1.88**

average trips, 2023 holiday season  
versus 2.01 trips in 2022

**\$2,725**

average holiday travel budget\*

**15%**

higher leisure travel spending  
intent among American travelers  
compared to 2022 holidays\*\*

Questions: (1) What is your total estimated travel budget for your trips between Thanksgiving and mid-January? (2) How long will your longest trip this holiday season be?

(3) How many leisure trips will you be taking this holiday season?

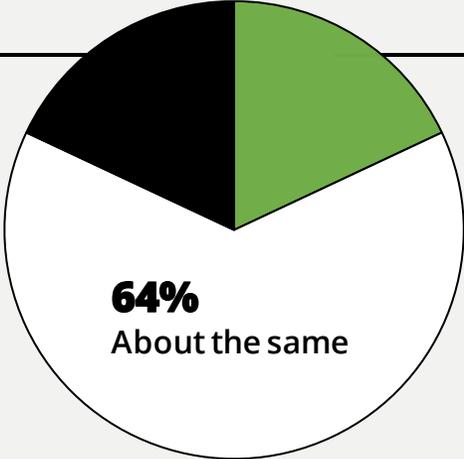
Notes: \*Average budget for travelers who plan to stay in paid lodging and/or fly to their destination with seasonal travel budgets between \$150 and \$15,000; \*\*According to Deloitte ConsumerSignals.

# About one in five travelers are cutting back, and a similar share is increasing budgets

How does your 2023 trip budget compare to your budget in 2022?

**18%**  
Significantly less

**18%**  
Significantly more



### Why less?

Financial concerns are the biggest drag on travel spend, cited by two-thirds of those decreasing spend.

About 20% say they are spreading their spend across shorter trips throughout the year or are saving for a bigger trip.

### Why more?

Higher travel prices are the biggest factor pushing budgets upward, by a wide margin.

About one in four respondents are spending more because they are taking “bucket list” trips, their needs have changed, or they are more comfortable financially.

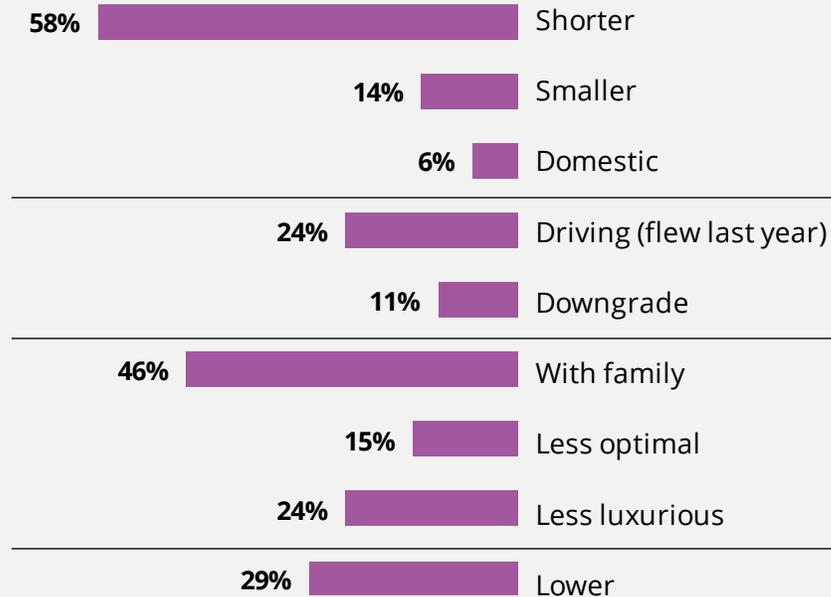
20% say they place a higher value on travel post COVID-19.

Questions: (1) How does your budget for this trip compare to your budget for your longest trip of the 2022 holiday season? (2) What best describes why you are spending more/less on this trip than you did on your longest holiday trip in 2022? (3) What, if any, adjustments are you making versus last year's trip that make it more/less expensive?  
Note: N = 2,531.

# Travelers have many options when they want to trim or boost budgets

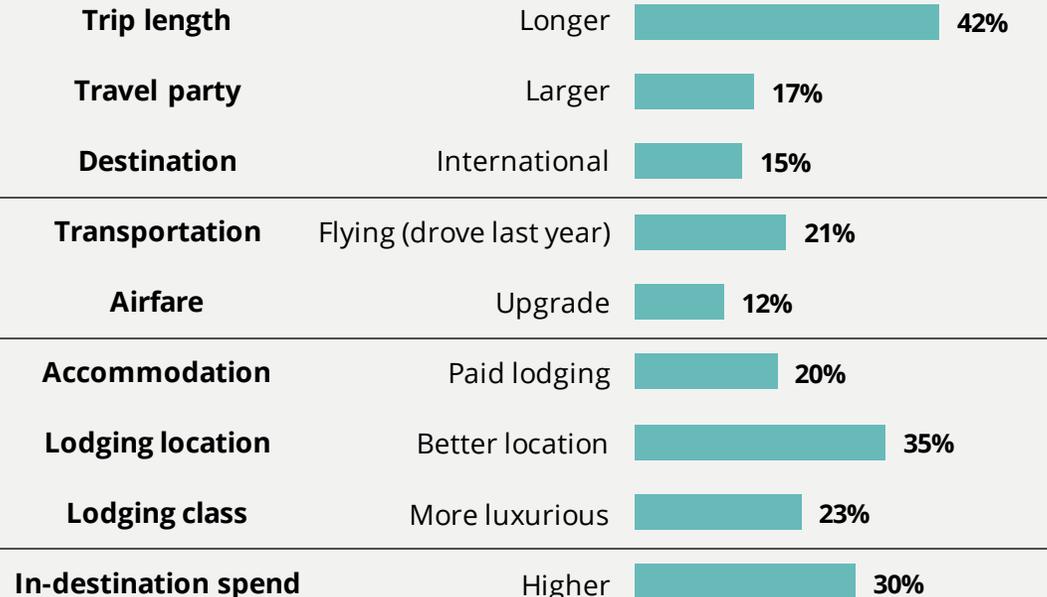
## How are travelers cutting back?

18% of travelers say their budgets are significantly smaller. Here are the changes they are making versus 2022:



## How are travelers upgrading?

18% of travelers say their budgets are significantly bigger. Here are the changes they are making versus 2022:



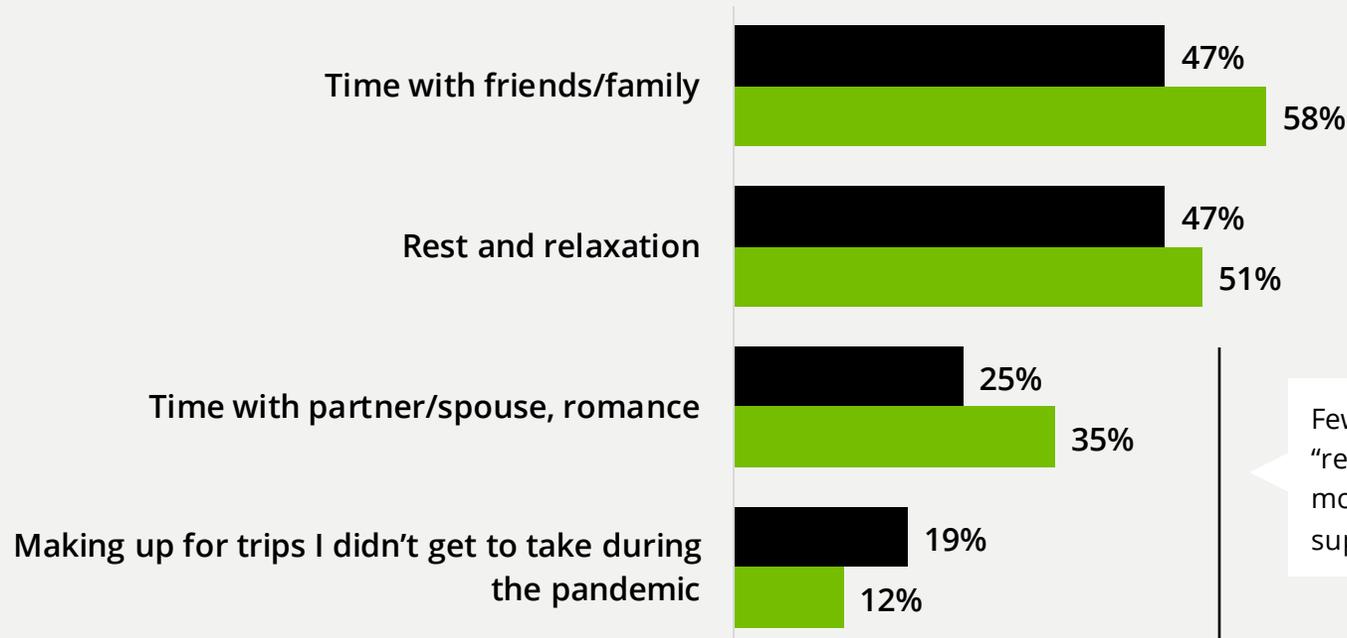
Questions: (1) What, if any, adjustments are you making versus last year's trip that make it less expensive? N = 420 travelers are spending significantly less versus 2022. (2) What, if any, adjustments are you making versus last year's trip that make it more expensive? N = 412 travelers are spending significantly more versus 2022.

Note: Data on cutbacks and upgrades is shown as percentages of travelers spending significantly less and more, respectively.

# Compared to summer travel, trips during the holidays arise from very different motivations; recent shifts could indicate that Americans are still adjusting to life in the wake of the pandemic

Top motivators for the longest trip

● Summer 2023 ● Holiday season 2023



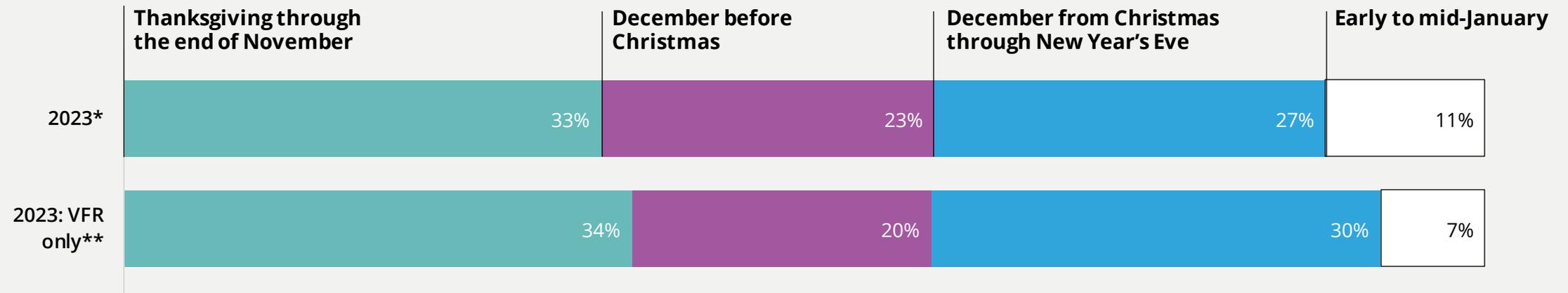
Always big travel motivators, time with loved ones, relaxation, and comfort are paramount during the holidays. Tradition beckons, and for many, a short window of quieter time at work offers a chance to relax. Summer travel, on the other hand, might lean a bit more toward adventure and exploration.

Fewer travelers say that they are directly motivated by “revenge” travel. Romance shows growing strength as a travel motivator, an indicator that Americans value travel’s ability to support social bonds.

Question: What motivates you to take this trip? (select all that apply)  
Note: N = 2,531.

# With fewer trips planned, the timing of trips concentrates around major holidays

Percentage of trips starting in every period of the holiday season (trip timing)



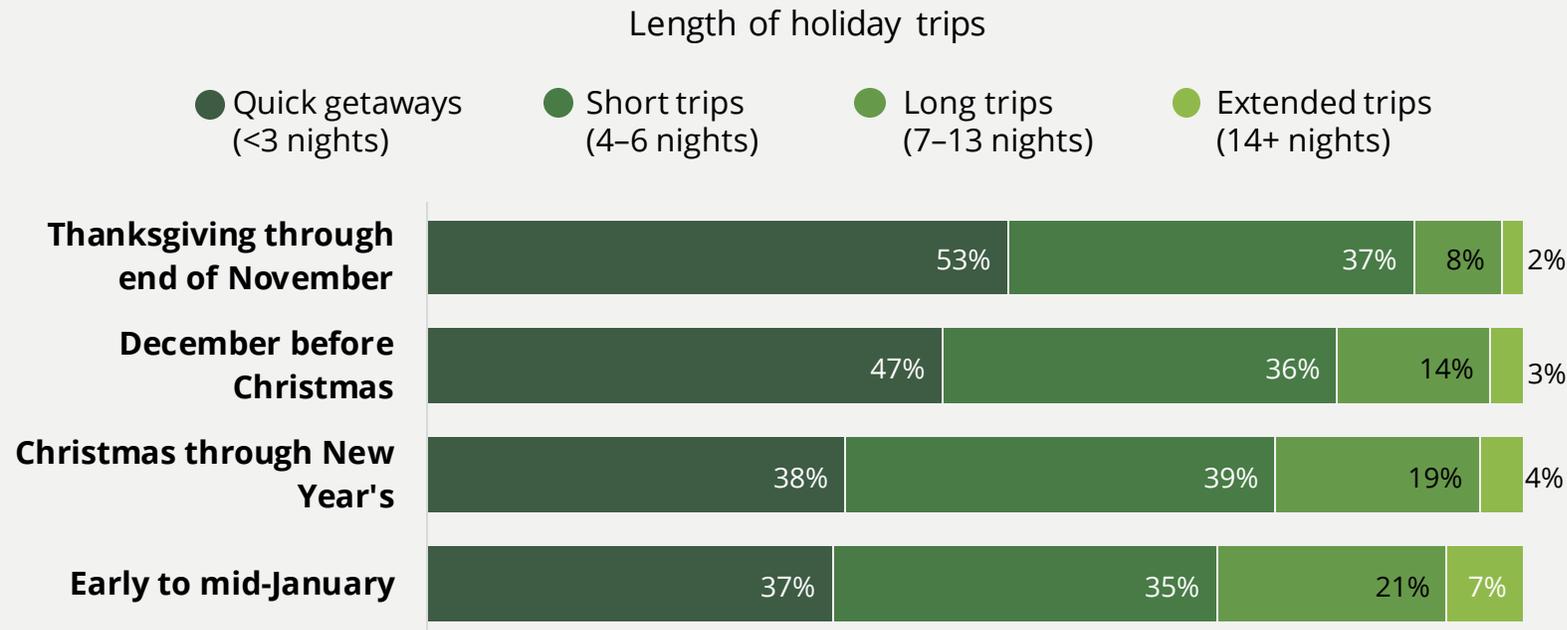
Trips closer to a major holiday are slightly more likely to involve staying with friends or relatives.

Question: Please select how many of your holiday trips begin in each time period.

Notes: N = 2,531; \*6%: Undecided for 2023; \*\*VFR = Visiting friends and relatives (versus staying in paid lodging); 8% undecided (VFR only).

# Trips will get longer as we move further into the holiday season

Quick getaways and short trips are popular during most holiday periods, but preferences shift toward longer vacations in December before Christmas and early to mid-January. Extended trips' share of overall trips doubles in January compared to earlier in the season.



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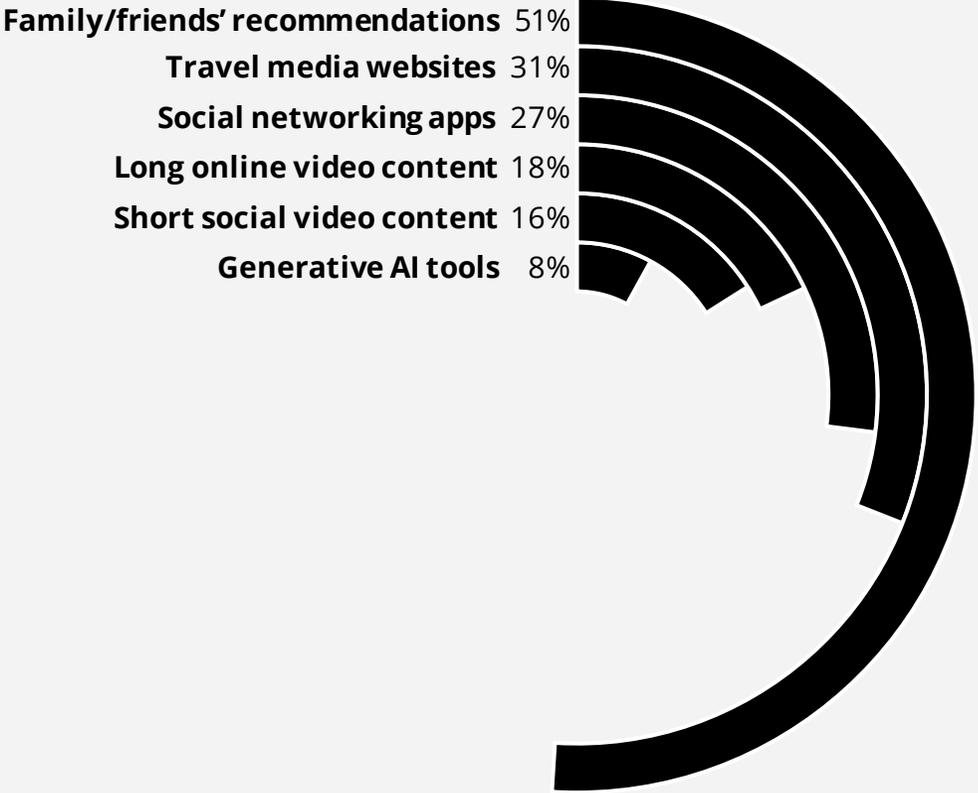
travel days added across the holiday season, on average, due to travelers' ability to work remotely

Question: For your trips beginning in each of the following periods, how long are you traveling for?  
Note: N = 2,531.

# Most travelers say they plan to book flights and hotels directly through supplier sites and apps. For trip planning, word-of-mouth still tops

Less than one in 10 travelers say they use generative AI tools to help plan their trips. The most popular uses of the technology in trip planning are finding in-destination activities and hotel options and aiding in destination selection.

Travelers' planning resources



Questions: (1) Which of the following have you used when planning a trip? (2) How have you used generative AI tools in travel discovery or planning?  
Note: N = 2,531.

# Travel products

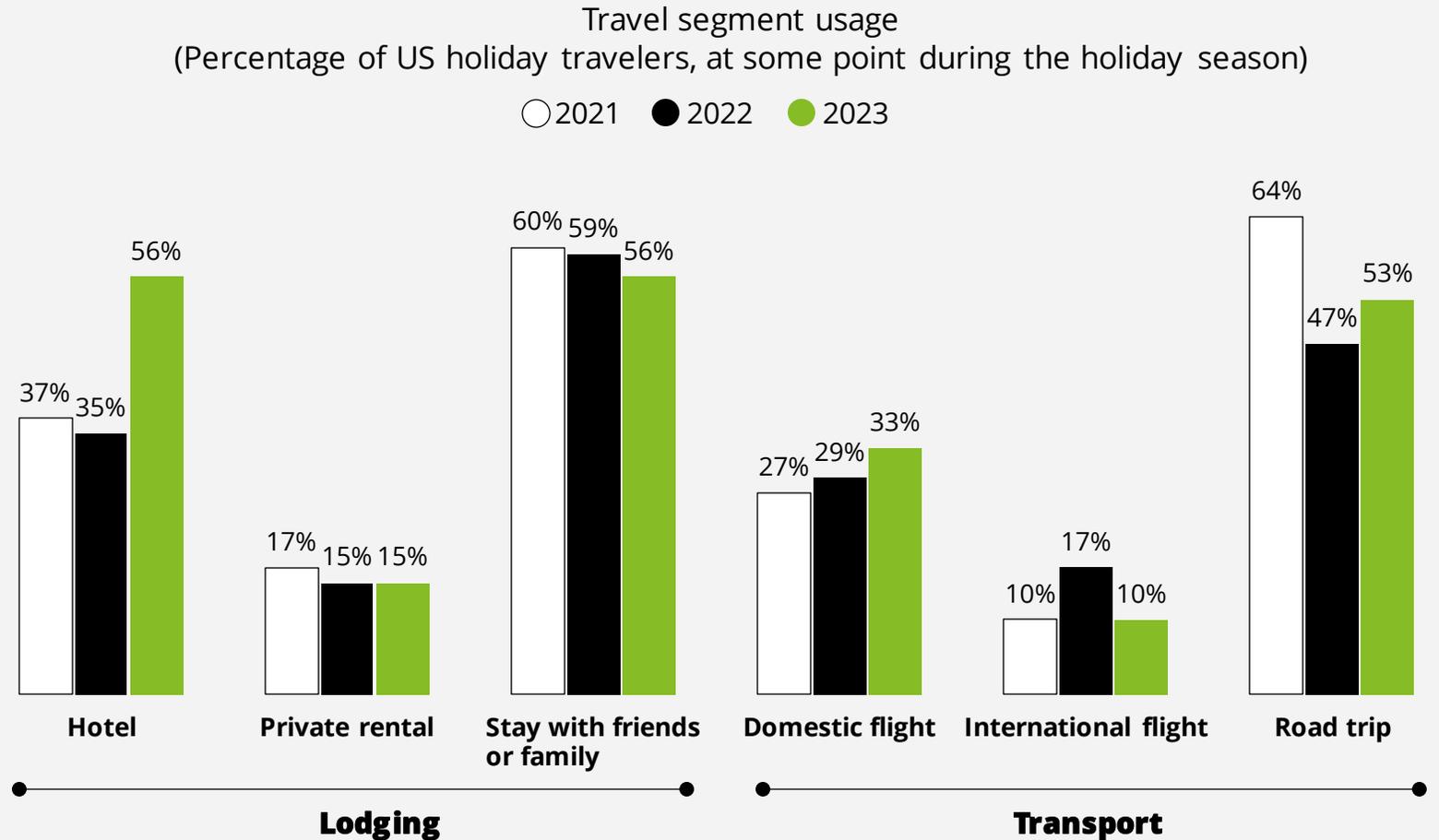
2023's rising travel tide is expected to lift demand across categories—from hotels to flights to in-destination activities.



# Big jump in hotel intent; air also set to rise

Americans' financial outlook has improved slightly versus 2022, while health concerns have subsided. More plan to experience leisure vacations including a hotel stay, in addition to quality time with loved ones.

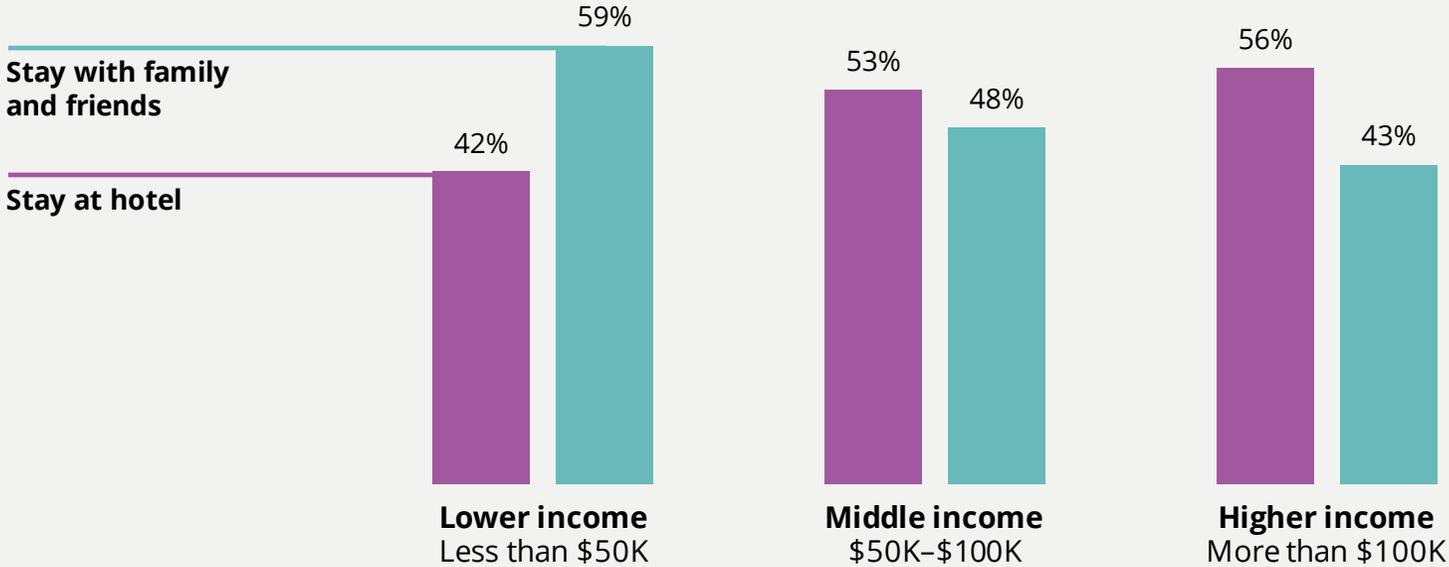
Road trip intent drops compared to 2021, when people were still avoiding air travel, while domestic flight intent rises



Question: Which (if any) travel products/activities you plan to partake of?  
N = 2,531.

# Income influences travel priorities—higher-income travelers twice as likely to fly as lower-income travelers

Which of the following will you be doing on your longest trip this holiday season?

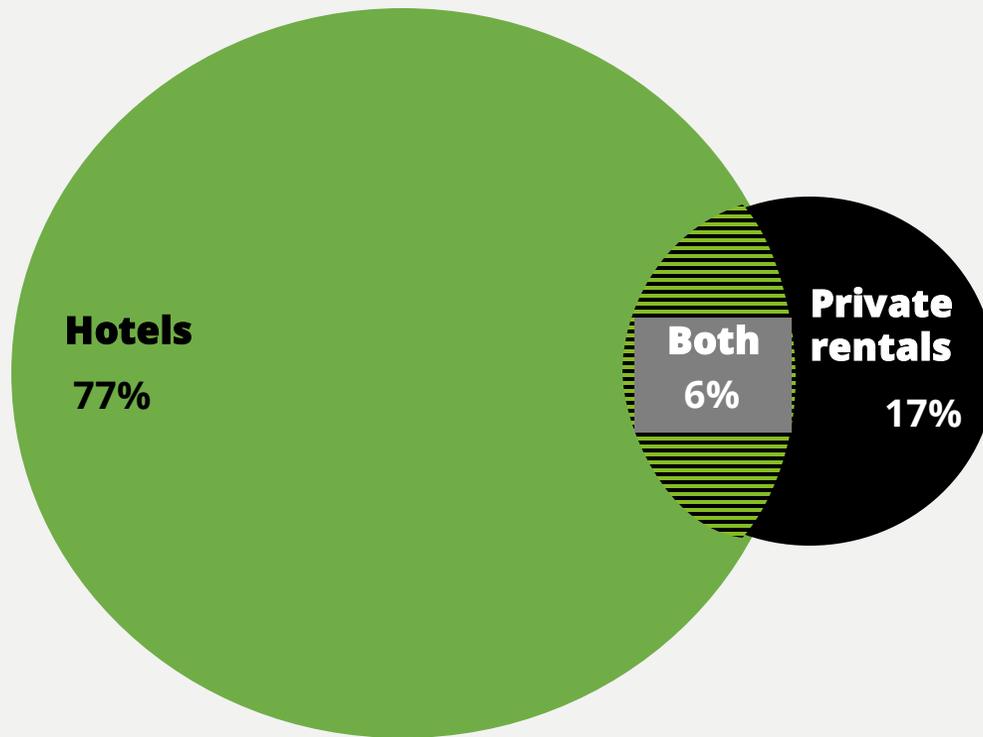


	Lower income Less than \$50K	Middle income \$50K-\$100K	Higher income More than \$100K
Stay at rental	10%	14%	17%
Take a flight	19%	28%	38%
Drive your own vehicle	34%	31%	31%
Rent a vehicle	15%	18%	21%

Note: N = 2,531.

# Destination mix affects lodging mix: City trips rise, while beach and great outdoors destinations dip, pushing up hotels' share of paid accommodations

Holiday 2023: Paid accommodation split, longest trip



Destination type	Hotel only	Rental only
Beaches	20%	<b>27%</b>
Cities	<b>49%</b>	31%
Great outdoors	16%	<b>31%</b>
Theme parks	6%	6%

Holiday destination preferences have shifted further toward cities—51% of travelers versus 41% in 2021. The rise in city trips is likely pushing up the demand for hotels as well.

Questions: (1) What best describes the destination you will travel to? (2) Which of the following will you be doing on your longest trip this holiday season?  
Note: N = 2,531.

# As drive trips decline, intent to fly is strong

About half of American travelers plan road trips this holiday season, down from nearly two-thirds in 2021, when many were still uncomfortable flying due to COVID-19. Driving distances have also declined compared to 2021.

Questions: (1) Which (if any) travel products/activities you plan to partake of? (2) Which of the following best describes your flight?  
Note: N = 2,531; N = 743 travelers flying on their longest trip.

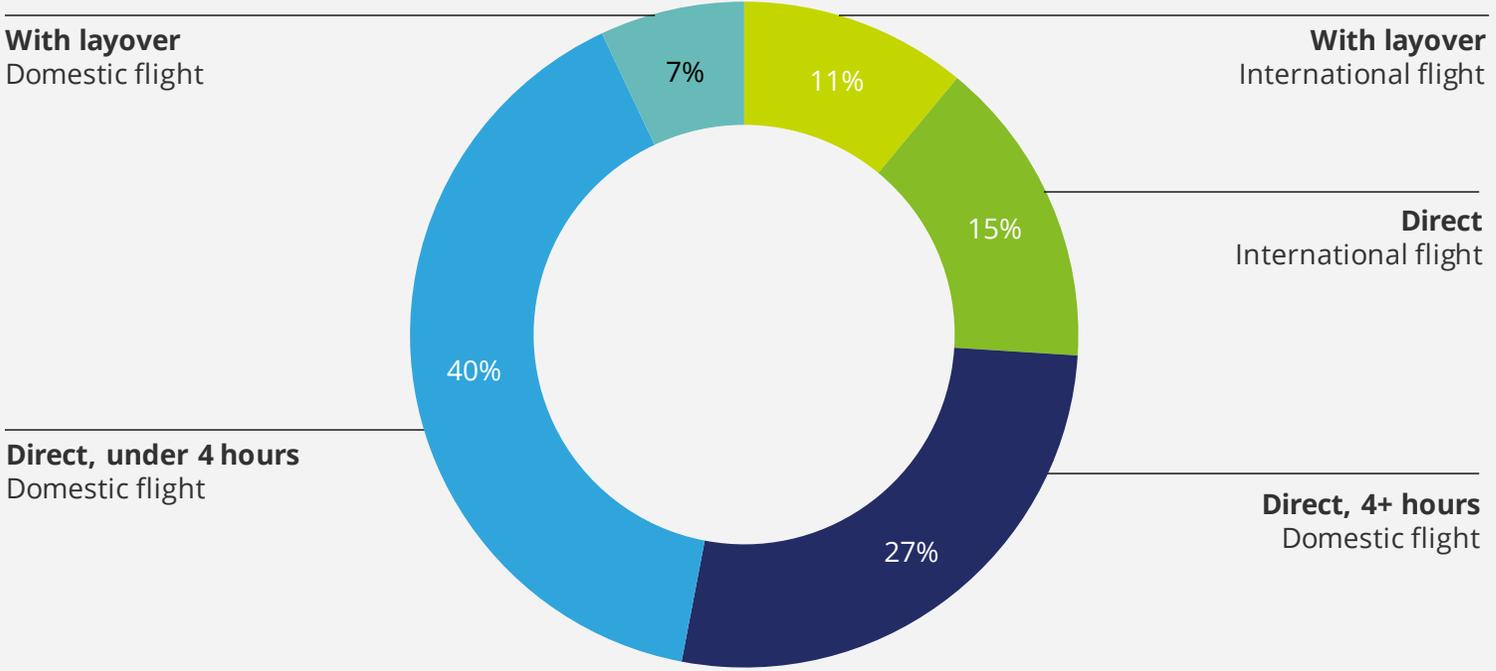
**37%**

of the travelers will take a flight at least once during the 2023 holiday season

**29%**

of travelers will take a flight on their longest trip of the season

Type of flight for the longest holiday season trip



# International trips will peak toward the end of the holiday travel season

## 26%

of air travelers will fly to international destinations

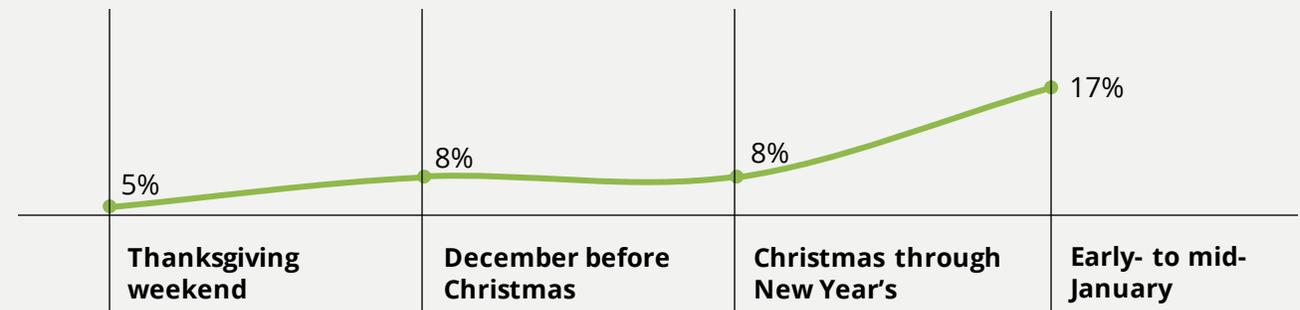
By generation:

- 38%** Gen Z
- 31%** Millennial
- 18%** Gen X
- 22%** Boomer

By income:

- 18%** Less than \$50K
- 24%** \$50K–99K
- 29%** \$100K+

International trips will surge in early January (% of US travelers by holiday period)



## How?

International travelers are more likely to **stay in paid lodging**—hotels (73%) and private rentals (28%)—compared to domestic flyers. 29% of those increasing spend this year are **upgrading their airfare class** versus 16% of domestic travelers.

## Why?

One in five international travelers are **making up for lost trips**, and a similar number are **traveling for a special event/trip**. 38% of those increasing their budget versus 2022 say it's for a special, bucket-list trip.

## With whom?

International travelers are more likely to **travel in larger groups with friends**. 11% each will be traveling in groups of six or more people and with friends, compared to 2% and 5%, respectively, of domestic travelers.

## Social media usage

International travelers are **more likely to rely on social media** in their destination selection (52% versus 39% domestic travelers). Social content like apps, videos, travel websites, and generative AI also informs their planning and discovery processes more.

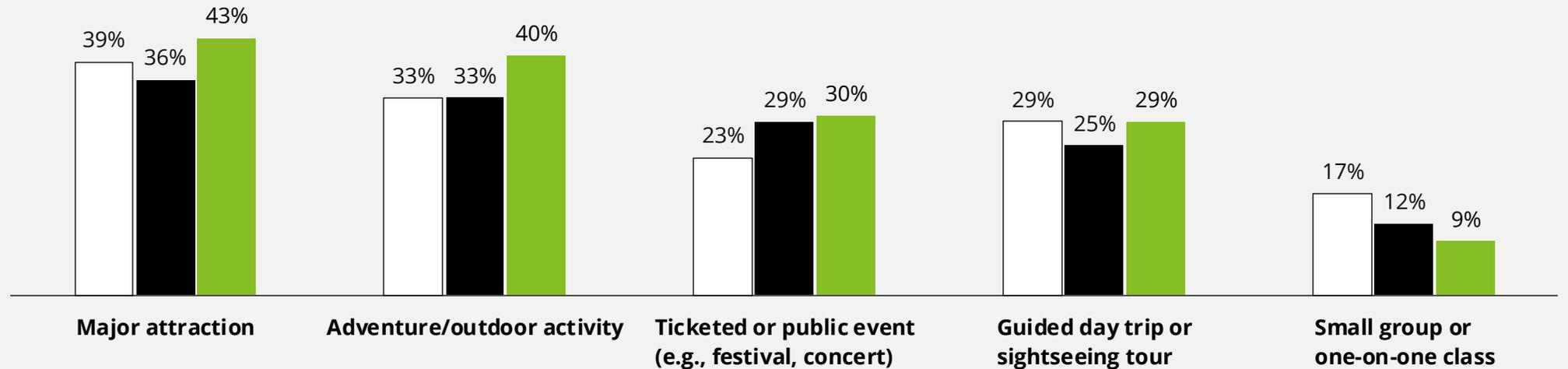
Questions: (1) What best describes the destination you will travel to? (2) Please indicate how important the following factors are to your destination selection. (3) Which international region will you be flying to?  
Note: N = 191.

# Participation is up across most travel activities

Participation in all in-destination activity types is at or above 2021 levels. Three in 10 travelers increasing their budgets say they will spend more on these activities. Travelers visiting friends and relatives are less likely to participate in in-destination experiences.

Participation in travel activities, lodging travelers

○ 2021 ● 2022 ● 2023



Participation in travel activities, VFR\* travelers

23%

25%

15%

17%

6%

Question: Which of the following experiences are you likely to participate in while traveling? Please select all that apply.  
 Notes: 2021 N = 1,501; 2022 N = 1,540; 2023 N = 2,531; \*VFR = Visiting friends and relatives (versus staying in paid lodging).

# Demographics

While travel intent is up across generations and income levels, baby boomers appear poised for a notable return to travel this year.



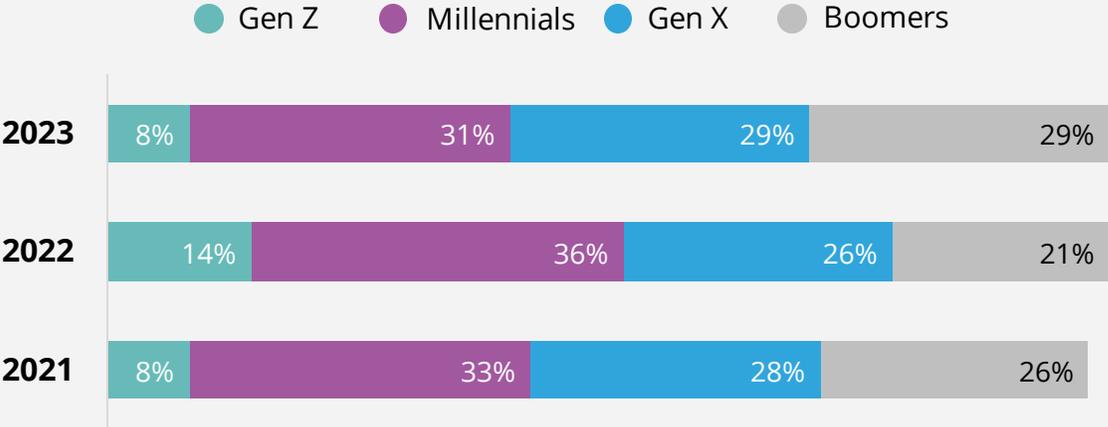
# Boomers' share of the traveling public will be up this holiday season

Financial concerns lead as travel deterrents across generations, but more so for Gen X and millennial Americans.

Travel disruption is a larger concern among boomers, while the younger generations are having a tougher time getting off work.

Questions: (1) What activities are you planning to partake in during the 2023 holiday season (between Thanksgiving 2023 and mid-January 2024)? (2) Why are you unlikely to travel this holiday season?  
 Note: N = 2,531.

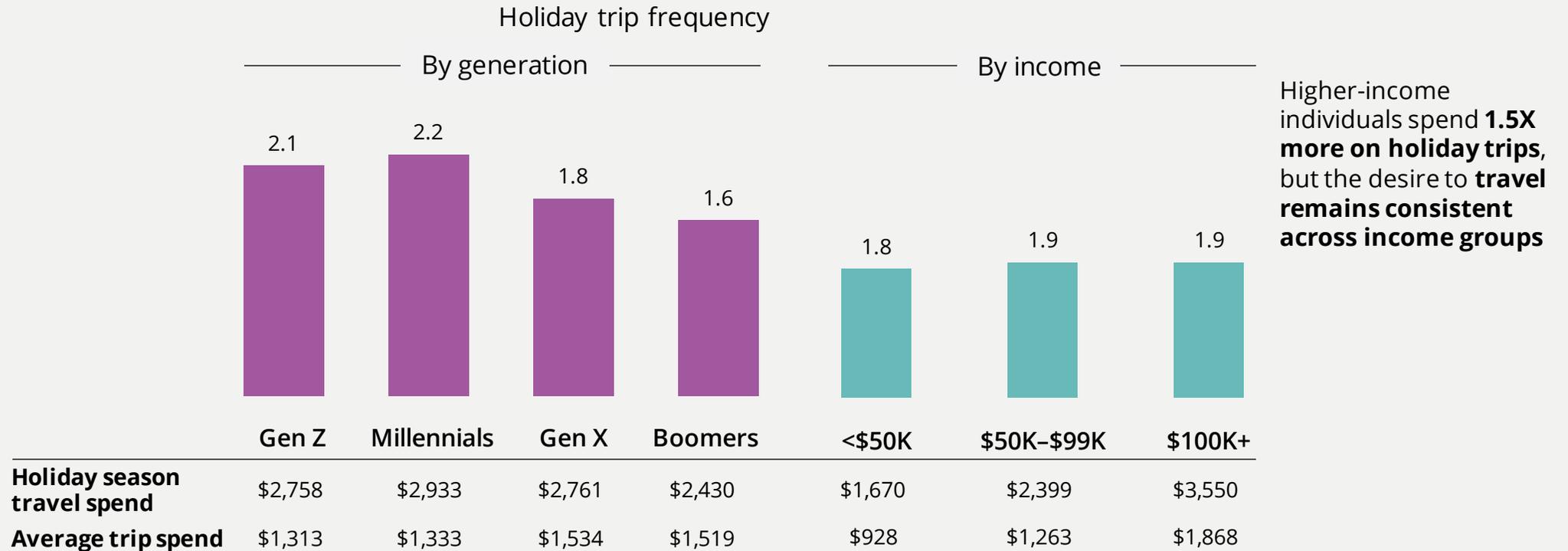
Traveling public by generation



Reasons for not traveling, 2023	Gen Z	Millennials	Gen X	Boomers
I cannot afford it	37%	<b>41%</b>	<b>44%</b>	34%
Travel is too expensive right now	30%	<b>35%</b>	<b>35%</b>	29%
Rather spend on other things	25%	20%	25%	25%
I'm concerned about travel disruption	9%	6%	9%	<b>14%</b>
I cannot get time off work	<b>14%</b>	<b>10%</b>	<b>8%</b>	3%

# Younger generations plan more trips and intend to spend more across the season

Boomers, despite traveling less frequently, tend to spend more per trip compared to Gen Z and millennials



Questions: (1) How many leisure trips will you be taking this holiday season? (2) What is your total estimated travel budget for your trips between Thanksgiving and mid-January?  
 Note: N = 2,531.

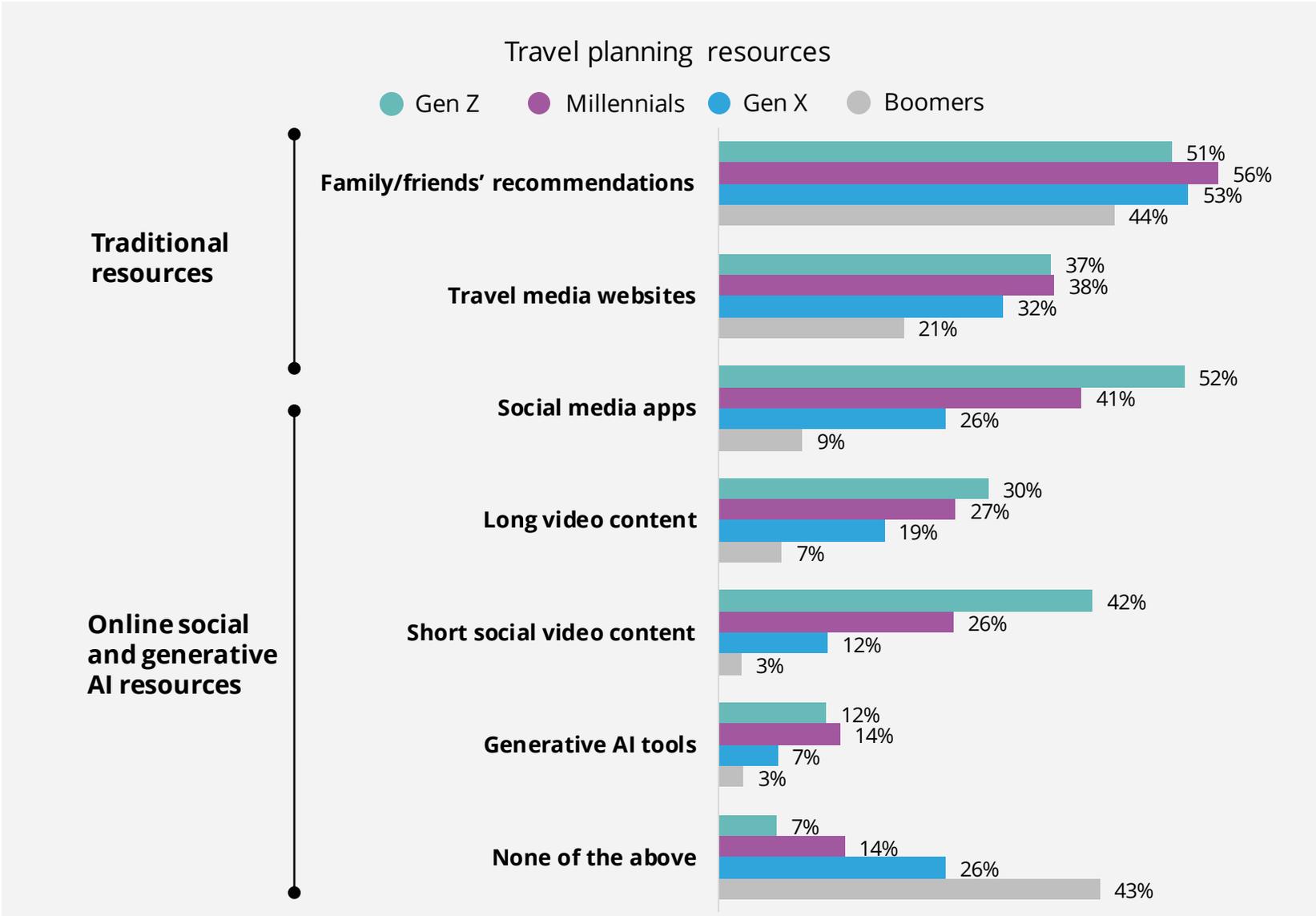
# Boomers are back in a big way, with some distinctive patterns compared to younger travelers

	Boomers	Younger travelers*
<b>Conservative spenders, but placing high value on travel</b>	Longest trip budget similar to 2022	69%
	Spending less to allow for more trips during the year	29%
	Increasing spend on in-destination activities**	39%
<b>Enjoying cities with a small travel party</b>	Traveling solo or with one other person	<b>77%</b>
	Visiting cities versus beaches	60% city, 7% beach
<b>Planning their trips offline</b>	Not turning to online resources to plan trips	43%
		57%
		19%
		27%
		<b>57%</b>
		50% city, 19% beach
		18%

Notes: \*Younger travelers include Gen Z, millennials, and Gen X; \*\*Data point as a share of those spending significantly more on travel overall versus 2022.

# Gen Z leads in adoption of social tech in trip planning, 1.6x as likely as millennials to use short social videos

Question: Which of the following have you used when planning a trip?  
 Note: N = 2,531.



# Gen Z travelers not only turn to their favorite content creators for ideas, but also search video platforms for activities, accommodations, and full itineraries

**16%**

of travelers say they use short social video content to plan trips

By generation:

- 42%** Gen Z
- 26%** Millennial
- 12%** Gen X
- 3%** Boomer

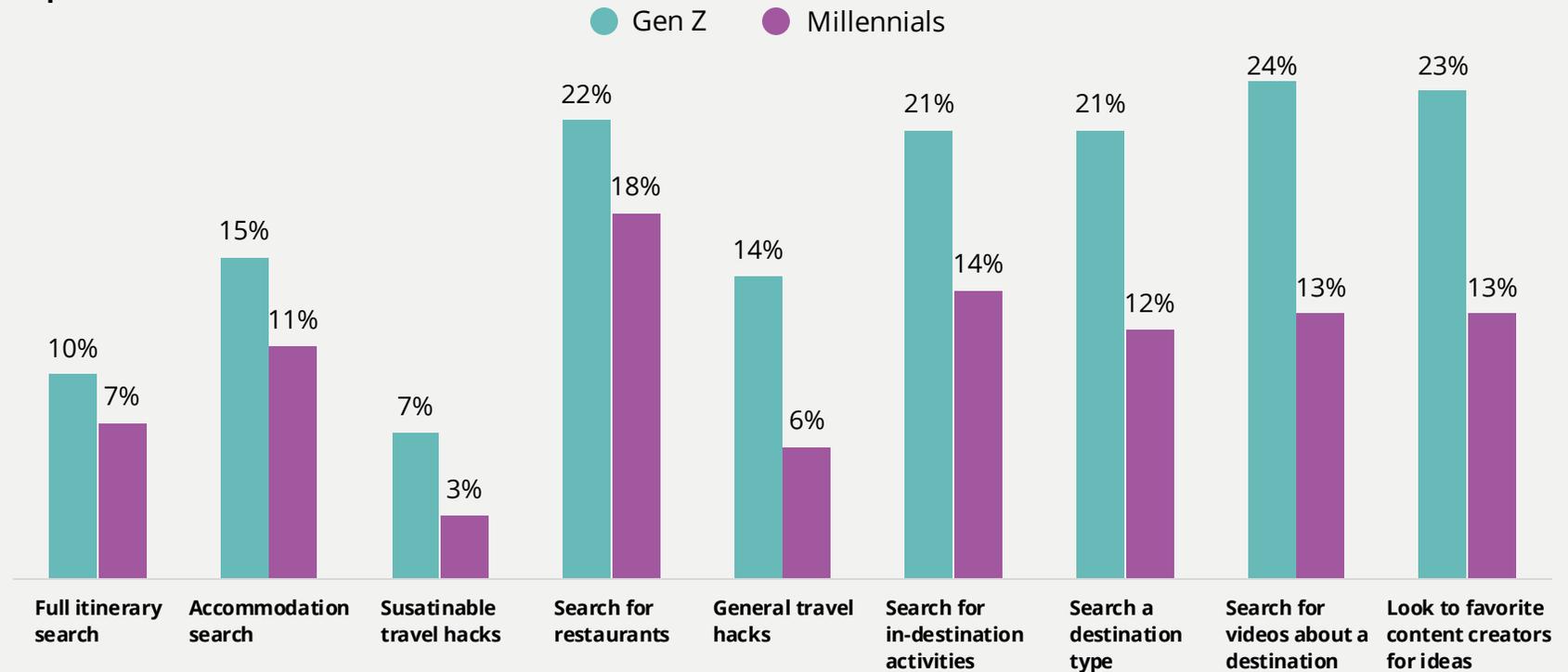
**8%**

of travelers say they use generative AI to plan trips

By generation:

- 12%** Gen Z
- 14%** Millennial
- 7%** Gen X
- 3%** Boomer

Short social video in travel planning  
Percentage of travelers using by generation



Questions: (1) Which of the following have you used when planning a trip? (2) How have you used short social video apps in travel discovery or planning?  
Note: N = 2,531; N = 404.

# Gen Z and millennials lead in efforts to travel more sustainably

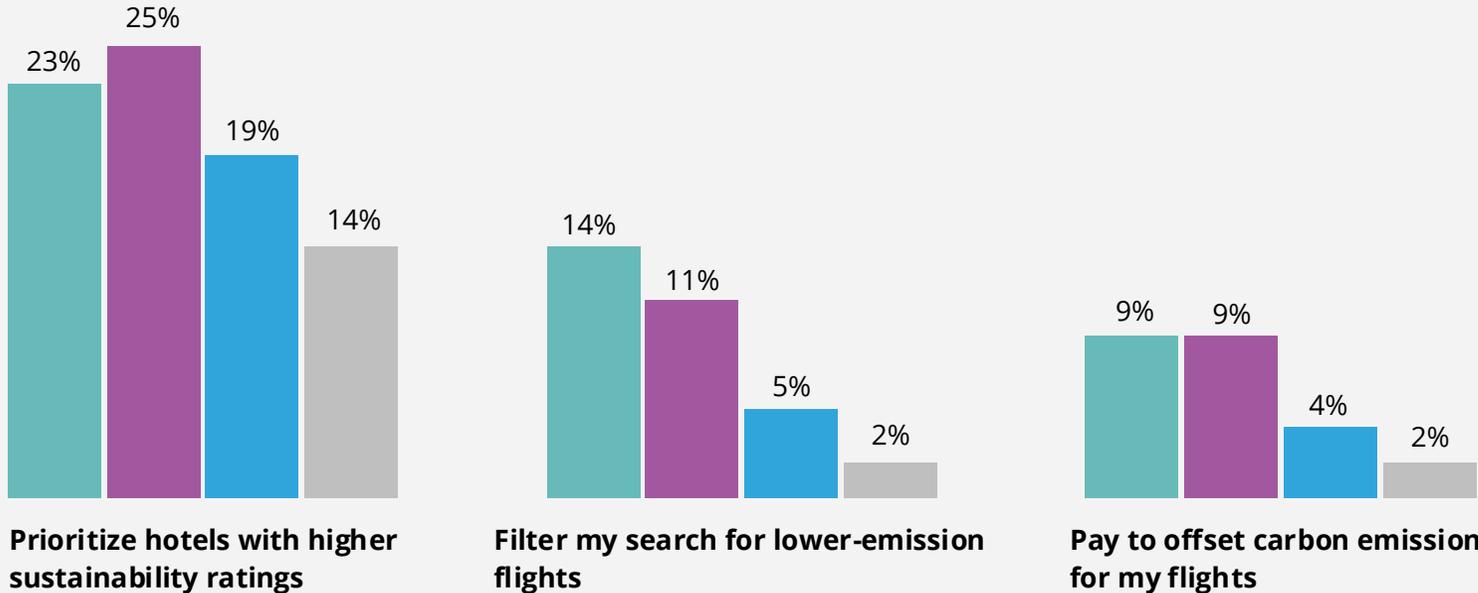
Prioritizing hotels with higher sustainability ratings (19% of all travelers) is the most popular environmentally conscious travel choice

Question: Which of the following do you try to do when you travel? Please select all that apply.

Note: N = 2,531.

Sustainable travel practices by age, 2023

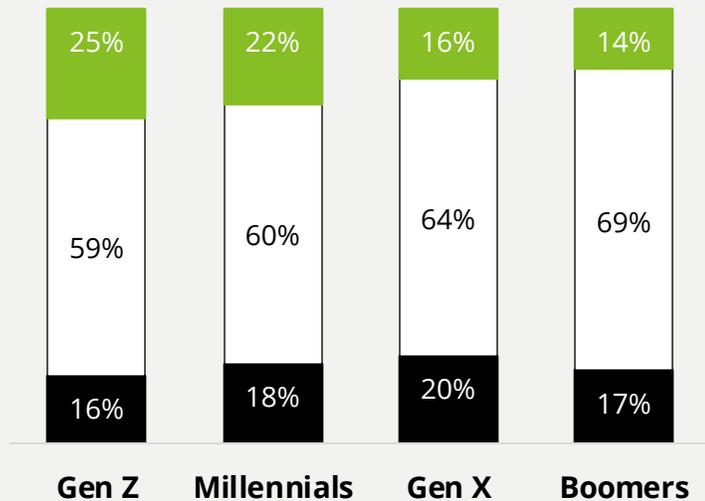
● Gen Z ● Millennials ● Gen X ● Boomers



# What drives increased spend? Younger generations cite improved financial situation, while older travelers feel higher prices give them no choice

How does your budget for this trip compare to your longest trip's budget of the 2022 holidays?

● Significantly more ○ About the same ● Significantly less



## Why is your trip more expensive this year?

	Gen Z	Millennials	Gen X	Boomers
Doing better financially	<b>45%</b>	37%	34%	8%
Remote working flexibility	20%	25%	21%	8%
Higher travel prices	16%	<b>42%</b>	<b>47%</b>	<b>53%</b>

## Why is your trip less expensive this year?

	Gen Z	Millennials	Gen X	Boomers
Concerned about finances	42%	<b>65%</b>	<b>69%</b>	<b>62%</b>
Saving for a bigger trip	<b>42%</b>	22%	15%	17%

Questions: (1) How does your budget for this trip compare to your budget for your longest trip of the 2022 holiday season? (2) What best describes why you are spending more/less on this trip than you did on your longest holiday trip in 2022? (3) What, if any, adjustments are you making versus last year's trip that make it more/less expensive?

Note: N = 2,531.

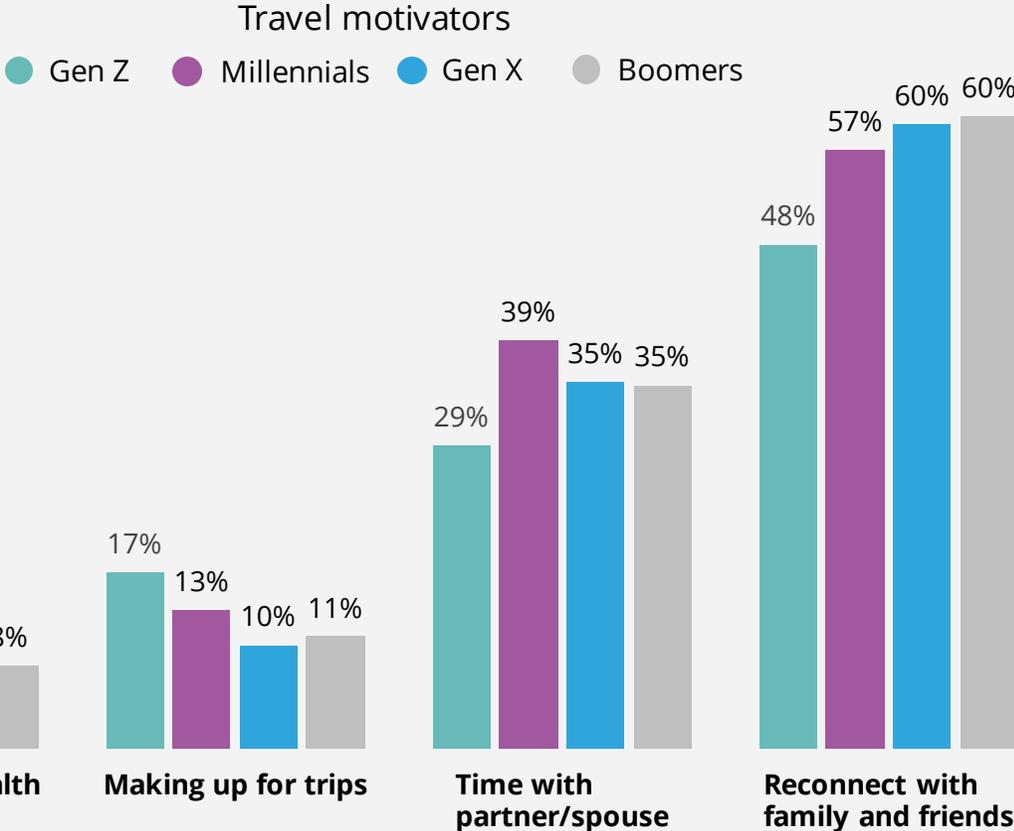
# Family and social connections remain a strong motivator, especially for older travelers

## Travelers taking three or more trips

- 14% Gen Z
- 5% Millennials
- 23% Gen X
- 15% Boomers

Questions: (1) How many leisure trips will you be taking this holiday season? (2) What motivates you to travel this holiday season? Please select all that apply.  
 Note: N = 2,531.

Younger travelers are more likely to cite wellness and making up for trips missed during the pandemic as travel motivators



# Remote work's effects on travel

American travelers continue to use remote work to extend their vacations. This group, which we call "laptop luggers," travel more frequently, take longer trips, and exhibit several distinctive behaviors compared to those who plan to disconnect.



*Greetings from:*

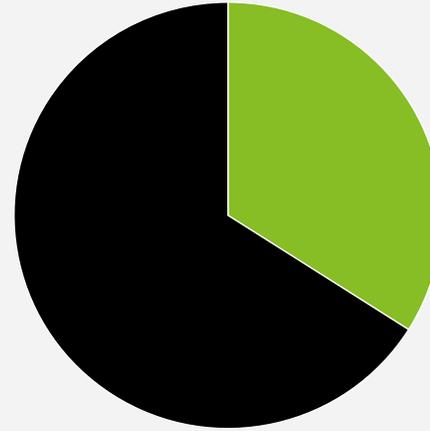
# One in three travelers say they are likely to work on their longest trip of the holiday season

Laptop luggers skew young and wealthy, compared to overall travelers.

Laptop lugging rates among higher-income travelers increased by 30%, while lower-income travelers are half as likely to bring their work with them as they were in 2022.

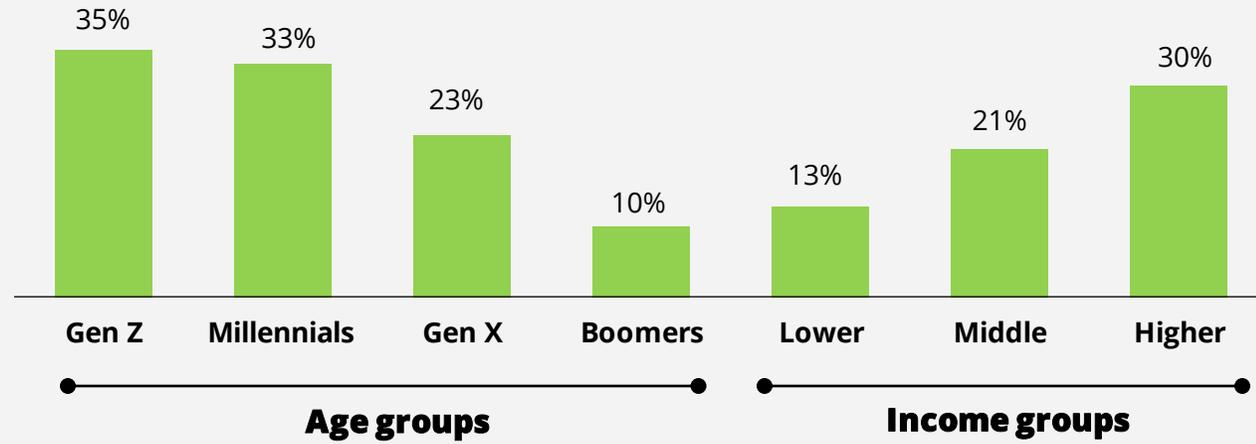
Questions: Do you plan to work during this trip?  
Note: N = 1,654 (travelers who are employed).

66%  
travelers intend to disconnect on their longest leisure trip of the season



34%  
travelers intend to work (at least partially) on their longest leisure trip of the season (versus 26% during 2022 holidays)

Percentage of age and income groups planning to work during their longest trip



# Laptop luggers are taking more trips throughout the season and are able to extend them thanks to remote working

About half of laptop luggers say they are concerned about separating work from leisure when working on their holiday season trip

Questions: (1) How many leisure trips will you be taking this holiday season? (2) How many days are you adding to the season and this trip because of the ability to work remotely? (3) How long will your longest trip this holiday season be? (4) How much is the estimated budget for the holiday season and the longest trip? (5) What adjustments are you making versus last year's trip that make it more expensive?

Notes: N = 1,654 (employed travelers); N (laptop luggers) = 569; N (disconnectors) = 1,085.



Travel characteristics: Longest holiday trip

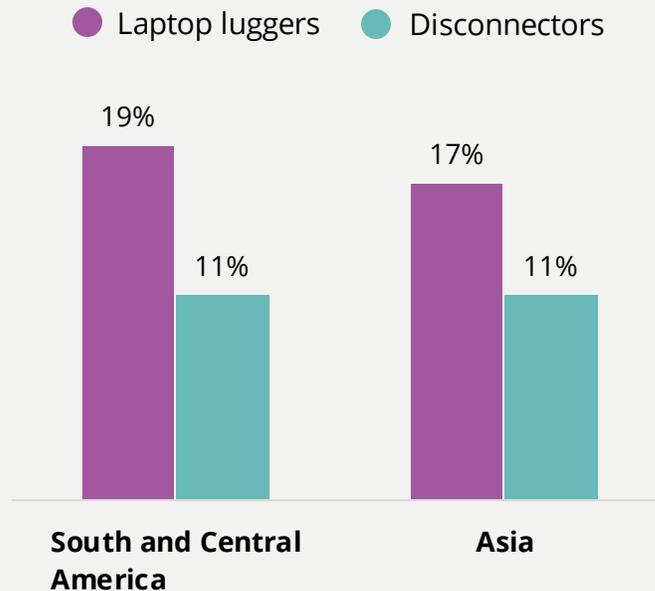
	Laptop luggers	Disconnectors
Longer trips (7+ nights)	34%	19%
Higher budgets (overall season)	\$3,421	\$2,645
Higher budgets (longest trip)	\$2,174	\$1,915
Splurging on	Upgraded airfare Lodging location	Bucket-list trips In-destination spend

# Laptop luggers are avid and engaged travelers

## More laptop luggers factor environmental and sociopolitical priorities into their travel decisions

	Laptop luggers	Disconnectors
Factor politics into destination selection	20%	12%
Prioritize hotels with higher sustainability ratings	30%	20%
Seek out independently owned guides and attractions	33%	20%
Search for lower-emission flights	15%	5%

Laptop luggers are more likely to travel internationally for their longest trip of the season. And those who do are more likely to travel to Asia and South or Central America.



A higher percentage of laptop luggers plan to participate in most in-destination activities

	Laptop luggers	Disconnectors
Major attraction	43%	39%
Guided tour	28%	25%
Public event (i.e., festival or concert)	32%	26%
Outdoor activity (hiking, skiing, etc.)	43%	37%
Group or one-on-one class	17%	7%

Questions: (1) Which of the following have you used when planning a trip? (2) Please indicate how important the following factors are to your destination selection. (3) Which of the following do you try to do when you travel? (4) Which of the following best describes your flight? (5) Which international region will you be flying to? (6) Which of the following experiences are you likely to participate in while traveling?  
 Note: N = 1,654 (employed travelers); N (laptop luggers) = 569; N (disconnectors) = 1,085.

# About the survey

## **Timing**

September 12 to September 25, 2023

## **Sample**

The survey polled a sample of 5,281 Americans online using an independent research panel. Of these, 2,531 respondents who are planning to travel between Thanksgiving and mid-January qualified as holiday travelers. The survey has a margin of error of plus or minus two percentage points for the entire sample.

## **Thank you**

The authors would like to thank **Steve Rogers**, **Anand Kumar**, and **Srinivasarao Oguri** for their contributions to this report.

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