

**Deloitte.**  
Insights

# Flight or fold: Travelers navigate pricing pressure

*2026 Deloitte Summer Travel Survey*

# Table of contents

**6**

Summer 2026 travel demand outlook  
Incidence, frequency, and spend trends

**17**

Travel products  
Transportation, lodging, and activities

**27**

From inspiration to booking

**33**

Generational trends

**38**

Travel trends in brief  
Loyalty, luxury, and laptop lugging

# Methodology note

This report relies on a survey fielded to a representative sample of 4,003 Americans from April 2 to April 9, 2026. Please refer to the source lines for clarification on the questions asked and sample sizes.

Throughout the report, readers will notice several references to travelers' longest trips or **marquee summer trips**. Because most travelers will take multiple trips across the season, including a mix of short getaways and weeks-long vacations, it is useful to delve into the longest trip. Travel behaviors across the season, combined with patterns and preferences for the longest trip, can provide a more comprehensive view of travel decisions and purchase trends.

Where the report refers to generations, the following birth years apply: baby boomers, 1946 to 1964; Generation X, 1965 to 1980; millennials, 1981 to 1996; and Generation Z, 1997 to 2008.

# Flight or fold: Travelers navigate pricing pressure

Travel enthusiasm faces a new cost reality, keeping some home and compelling others to dig deeper into their pockets

This coming summer, sticker shock is sidelining some travelers. Forty-five percent of surveyed Americans are planning vacations, the lowest in the last six years. General affordability is a major concern among non-travelers, and a growing number of those staying home specifically highlight the high cost of travel. Also compounding matters somewhat are creeping concerns about safety and trip disruptions.

Industry data suggests high price perceptions are founded. March airfare and lodging rates both rose year over year for the first time since January 2025.<sup>1</sup> CoStar reported average daily rate gains of 3.8% for US hotels in April, noting it was the strongest month for rates in “well over a year.”<sup>2</sup>

Faced with a dearth of discounts, many travelers still planning trips show a determination to get away, even if it means spending more. Planned trip frequency and length are similar to 2025, while intended budgets are up. These positive trends are somewhat driven by the makeup of the traveler pool. With more Americans at the lower end of the income spectrum feeling the financial pinch and staying home, those with income of \$100,000 and above will account for 53% of the traveling public, up from 49% in 2025.

Several signals of spending are up across income levels. Respondents who decide to travel seem largely unwilling to make significant compromises to rein in budgets. More travelers say they plan to increase their marquee trip budgets (24% versus 19% in 2025), while fewer plan to decrease them (11% versus 14% in 2025). The pattern holds for lower as well as higher earners.

One indicator of the mindset of American travelers this summer is that more say they are increasing budgets due to high prices and because travel has become more important to them. Travelers are spending more because they have to and are resisting compromise. That posture exists across income levels.

In a possible signal of uncertainty or price-wariness, travelers have made less progress booking their trips compared to 2025. Travelers with \$100,000 to \$199,000 in household income exhibit the biggest booking progress gap (37% fully booked versus 45% in 2025). They may be feeling the greatest conflict between their travel preferences and their ability to afford them.

Beyond the dip in overall travel incidence, there are few concerning signals for travel providers in the upcoming summer season. Travelers are not shying away from any particular types of lodging or showing resistance to upgrading flights. Pockets of challenge could include suppliers targeting lower-income levels, but those may be able to coax demand up with well-constructed and intelligently targeted deals.

Sources: <sup>1</sup>Bureau of Labor Statistics consumer price index, April 2026; <sup>2</sup>Stephanie Ricca, Jan Freitag, and Isaac Collazo, "[US hotel average daily rate rises above inflation for the first time in more than a year](#)," CoStar, April 30, 2026.

# Key findings

## Travel intent reaches lowest level since 2020

Travel incidence is at its lowest point in the last six years, and concerns about increasing airfare and room rates are big reasons why. Concerns about trip disruption play a smaller role, but twice as many as last year cite it as a reason to stay home.

**Financial pressure is the main drag: 32% of non-travelers say travel is too expensive, while 35% say they cannot afford it.**

**The pullback is most pronounced among households earning under \$100,000**, where intent has dropped sharply, reshaping the traveler mix toward higher-income groups.

## Willing to travel means willing to spend

Those who plan to travel are absorbing higher prices without compromising much of the experience. Across income levels, metrics like trip length and spending are up. Marquee trip budgets are up 17% from 2025. Air travel (including premium cabins) and stays at full-service hotels and destination resorts are steady or up when compared to 2025.

**About 1 in 4 travelers surveyed plan to significantly raise trip budgets, compared to 1 in 5 in 2025. And 38% of travelers spending more cite higher airline and lodging prices as their reason to raise budgets,** compared to 26% in 2025. Travelers are spending more not necessarily to get more, but because costs have risen for what they have come to expect.

## Laptop lugging returns as more travelers use flexible work to extend trips

A third of travelers surveyed plan to work during their longest summer trip, up from 23% in 2025. Laptop lugging correlates with longer trips, higher spend, and busier trips packed with more activities and attractions.

Millennials lead the surge, with 57% planning to work while traveling. **And for millennials and Gen Zs, remote work has been transformative. More than 80% of each say that it has impacted their travel habits, compared to 57% of Gen Xers.** The shape of the impact is varied, with no clear single behavior leading the way. Similar shares of laptop luggers say they now take longer, more spontaneous trips, and do more shoulder season travel, and take more getaways throughout the year.

## As generative AI adoption grows, demographics and usage trends emerge

Gen AI adoption in travel research has more than doubled in two years, with 1 in 4 travelers reporting usage. With this growth, some key trends are becoming apparent: **Thirty-six percent of surveyed millennials report researching travel with gen AI, making them the biggest users,** compared to 33% of Gen Z and 24% of Gen X. Follow-through on in-destination activity recommendations grew notably, leapfrogging from a laggard to a leader. **Still, the value of gen AI may not lie in a seamless path to the “perfect” trip:** Just 1 in 4 travelers say they are looking for a one-stop travel shop, and most say they enjoy shopping around.

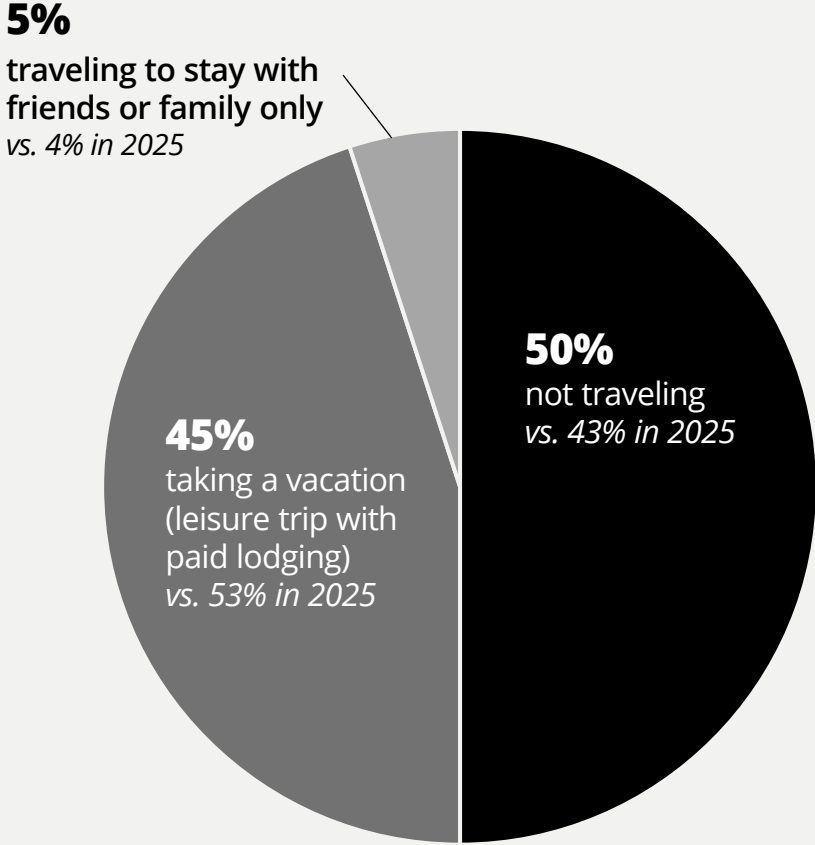
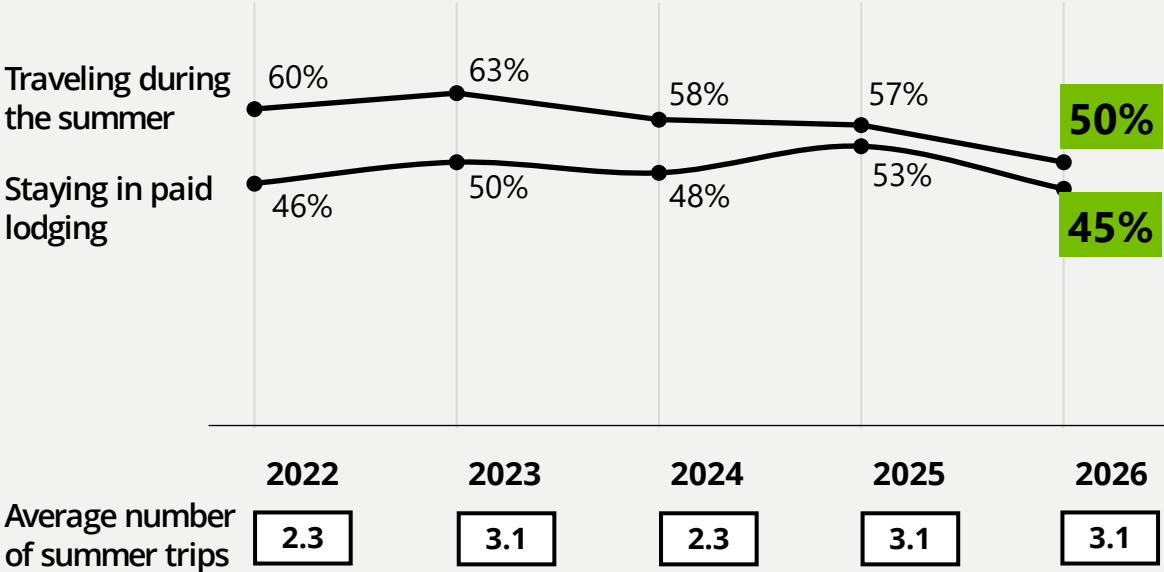
# Summer 2026 travel demand outlook

Incidence, frequency, and  
spend trends



# Planned travel incidence drops several percentage points, reaching its lowest point in several years

Share of Americans planning summer vacations,\* 2022 to 2026



Notes: Questions: (1) "What activities are you planning to partake in during summer 2026 (between Memorial Day and the end of September)?" (n = 4,003); (2) "How many trips have you booked or are you planning to take in summer 2026?" (n = 1,948); \*Vacation is defined as a leisure trip involving a stay in paid lodging, distinguished from travel that involves a stay with friends or family only.  
Source: 2026 Deloitte Summer Travel Survey.

# Prices—for travel itself as well as everyday household expenses—are curtailing summer travel for some

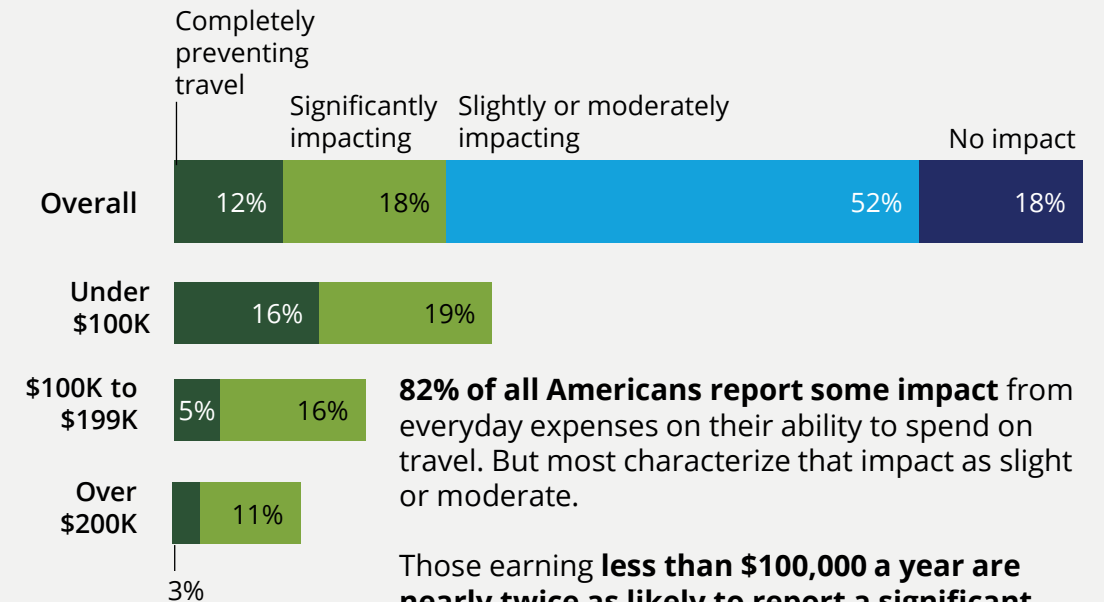
## Why are you not traveling this summer?

For non-travelers, financial considerations shift slightly toward *the current cost of travel*. Concerns about trip disruption and safety play a small but growing role in the decision to stay home.

	2026	2025	2024	2023
Cannot afford it	35%	38%	39%	50%
Travel is too expensive right now	32%	30%	32%	24%
Concerned about travel disruption	11%	6%	6%	6%
Don't feel safe traveling right now	11%	8%	6%	NA

Note: Question: Why are you unlikely to travel this summer?" (Please select up to three) (n = 2,001 non-travelers).  
Source: 2026 Deloitte Summer Travel Survey.

## How much are everyday expenses affecting your ability to spend on travel?



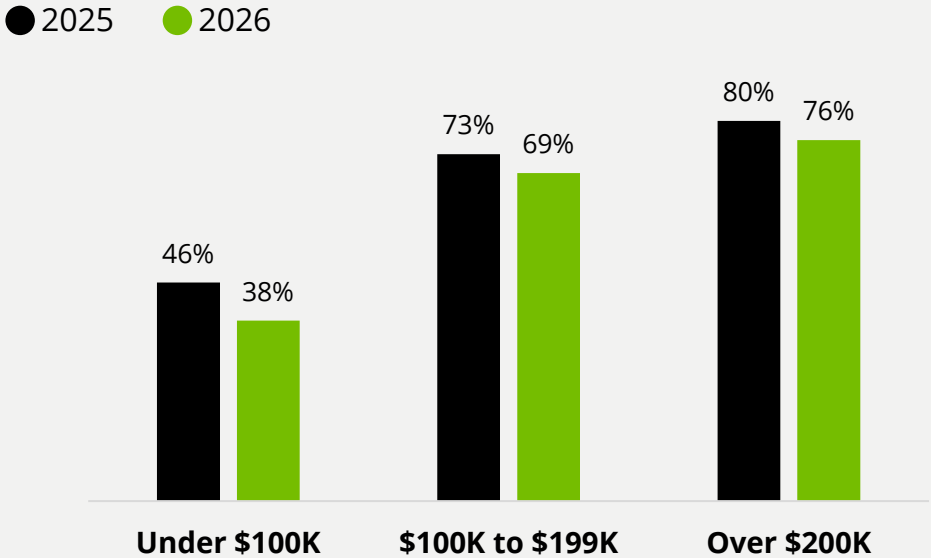
**82% of all Americans report some impact** from everyday expenses on their ability to spend on travel. But most characterize that impact as slight or moderate.

Those earning **less than \$100,000 a year are nearly twice as likely to report a significant impact** as those earning more than \$200,000.

Note: Question: "How much are everyday expenses currently affecting your ability to spend on travel?" (n = 4,003 Americans).  
Source: 2026 Deloitte Summer Travel Survey.

# Although travel incidence is down across income levels, the decline is sharpest at the low end, driving up the upper-middle-income level's share of summer travelers

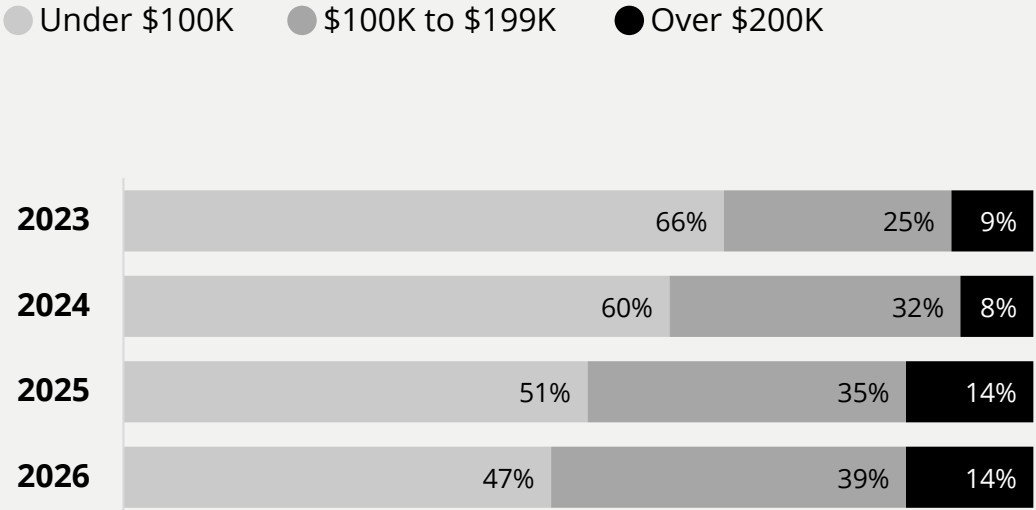
**Travel incidence, by income**



Financial concerns have hit lower-income Americans the hardest, leading to a steep decline in summer travel intent among those with less than \$100,000 in household income.

Note: Question: "What activities are you planning to partake in during summer 2026 (between Memorial Day and the end of September)?" (n = 4,003).  
Source: 2026 Deloitte Summer Travel Survey.

**Share of traveling public, by income**



As Americans with income of \$100K to \$199K increase their share of the traveling public, their summer travel tendencies (such as relatively high frequency and spend) will be more prominent.

# Willingness to spend across income levels should translate into steady demand across categories

In a year of lower-incidence travel, high-income travelers tend to drive up average trends. In 2026, travelers at all income levels expect to spend more, supporting resilient intent across travel categories.

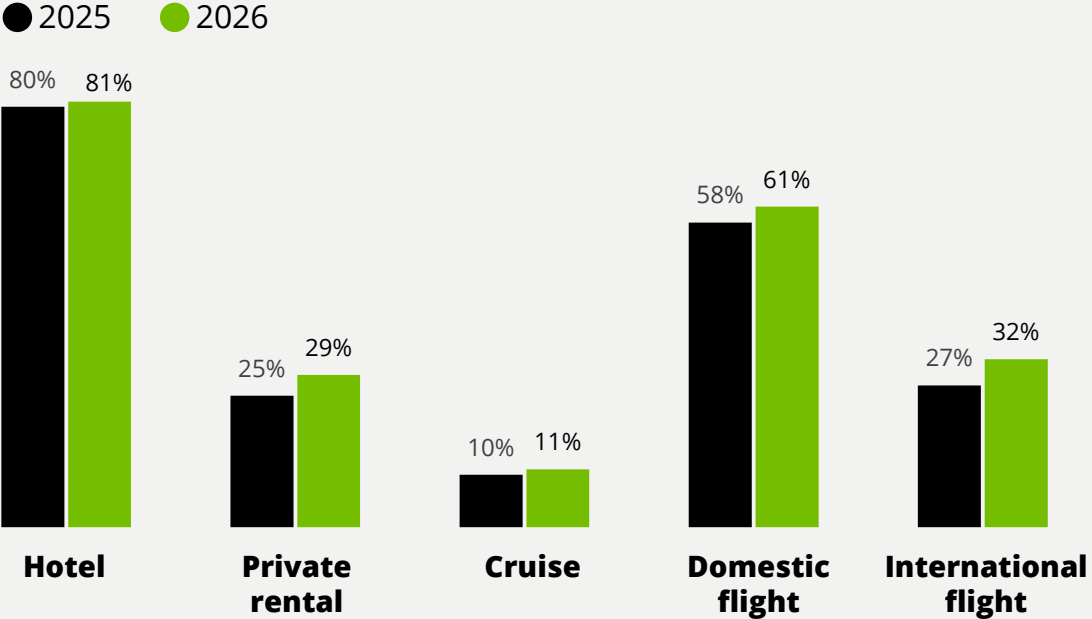
### Across income levels, trip frequency is similar to 2025, while trip budgets are up

Income level	Trip frequency 2025 to 2026	Marquee trip budget vs. 2025
<b>Under \$100K</b>	2.9 to 2.7	+6%
<b>\$100K to \$199,000</b>	3.2 to 3.3	+24%
<b>Over \$200K</b>	3.8 to 3.7	+14%
<b>Overall</b>	3.1 to 3.1	+17%

Notes: Questions: (1) "Of your [x] leisure trips in 2026, how many trips will you be taking this summer?"; (2) "What is your budget for this trip?"; n = 1,948 for both questions.  
Source: 2026 Deloitte Summer Travel Survey.

### Intent is stable across core travel product categories

Travelers planning to book, summer 2025 vs. 2026



Note: Question: "Across your travels this summer, which accommodation/transportation options are you likely to use?" (Select all that apply) (n = 1,948).  
Source: 2026 Deloitte Summer Travel Survey.

# Faced with high prices, many travelers choose to spend more for the experience they want

## How does your 2026 trip budget compare with 2025?

**24%**

Significantly more (versus 19% in 2025)

### Why more?

More say they are absorbing rising prices—38% of travelers spending more cite higher airline and lodging prices as their reason to raise budgets, compared to 26% in 2025. More also say that travel has become more important for them. **Both of these trends are strongest at the \$100K to \$199K income level**, indicating this group in particular is seeing higher prices and deciding that travel is too important to compromise.

**11%**

Significantly less (versus 14% in 2025)

### Why more?

Financial concerns are the biggest cause of tighter budgets, cited by 48% of those reducing spend. The share specifically pointing to travel prices has climbed to 43%, up from 29% in 2025.

Notes: Questions: (1) "How does your budget for this trip compare to your budget for your longest summer trip in 2025?"; (2) "What best describes why you are spending more/less on this trip than you did on your longest summer trip in 2025?"; (3) "What, if any, adjustments are you making versus last year's trip that make it more/less expensive?"; n = 1,808 for all questions.  
Source: 2026 Deloitte Summer Travel Survey.

## Travel upgrades versus previous year (among those raising budgets)

● 2025 ● 2026

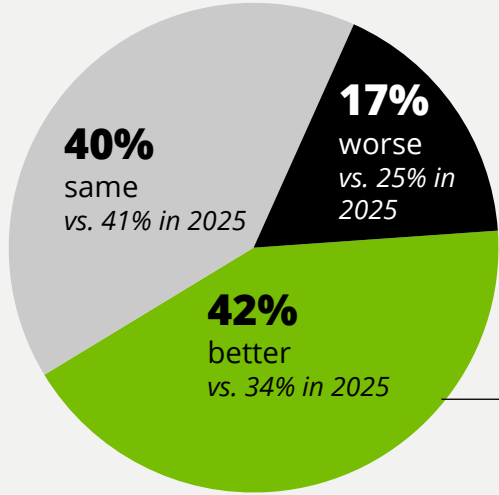
Longer trips remain the top upgrade for budget increasers, but upgrading comfort gains some traction in 2026



# Travelers' financial perceptions have improved across income groups, supporting their acceptance of high prices

**Financial situation among summer travelers**

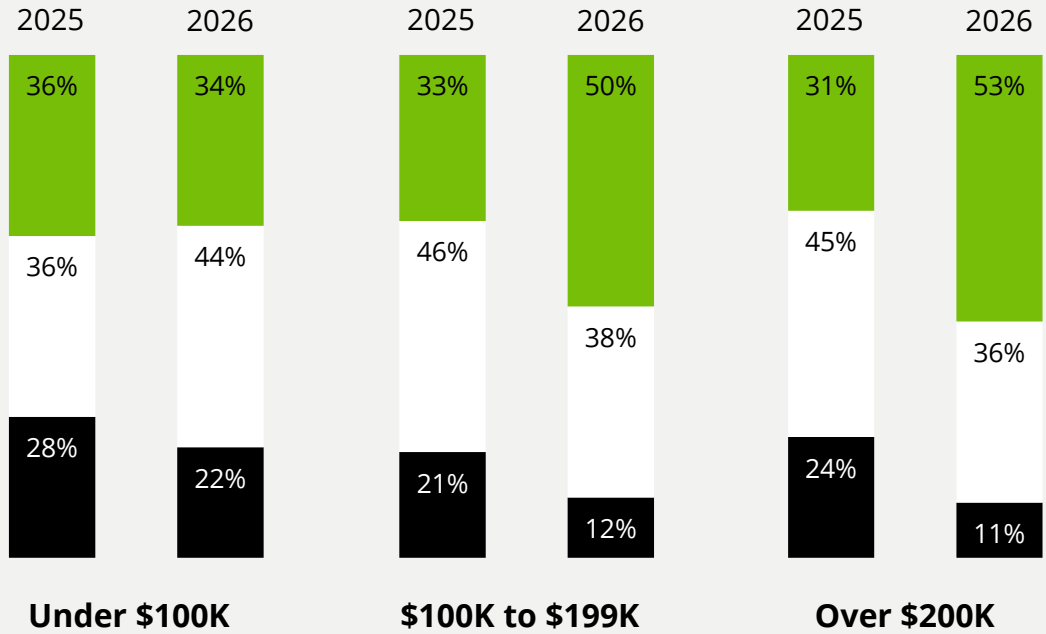
● Better ● Same ● Worse



**34%** of travelers with improving financial sentiment are significantly increasing marquee trip budgets

**Financial situation among summer travelers vs. 2025, by income**

● Better ● Same ● Worse

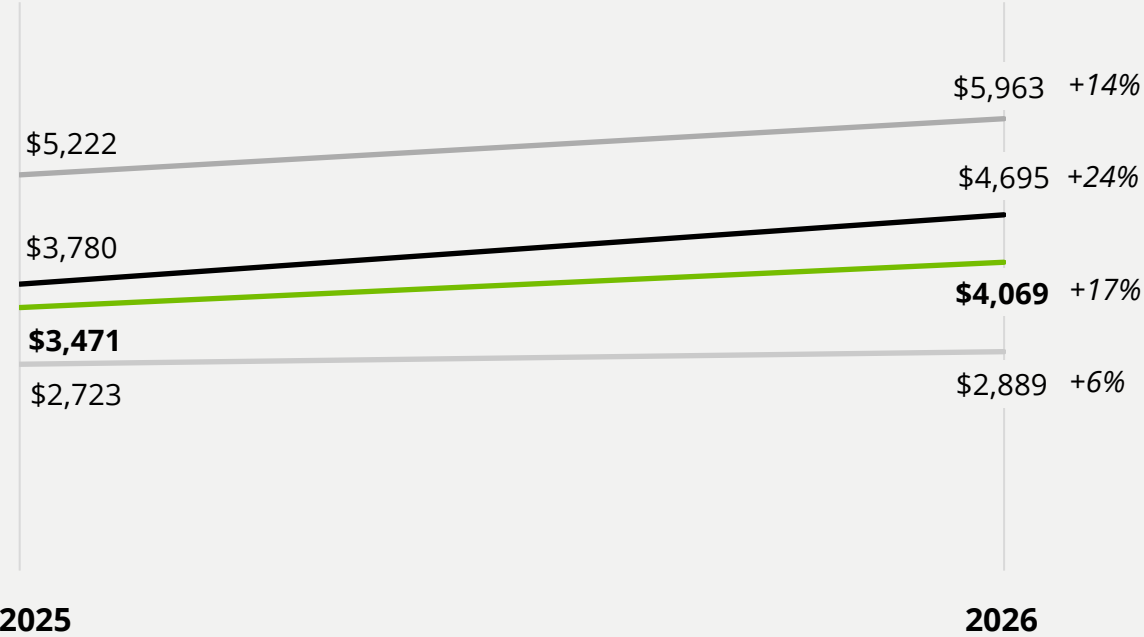


Note: Question: "Thinking about your household's current financial situation, would you say it is better/worse/the same?" (n = 1,808). Source: 2026 Deloitte Summer Travel Survey.

# Marquee trip budgets are up across the board, with the \$100K to \$199K income group making the biggest climb

## Marquee trip budgets, by income

● Overall ● Under \$100K ● \$100K to \$199K ● Over \$200K



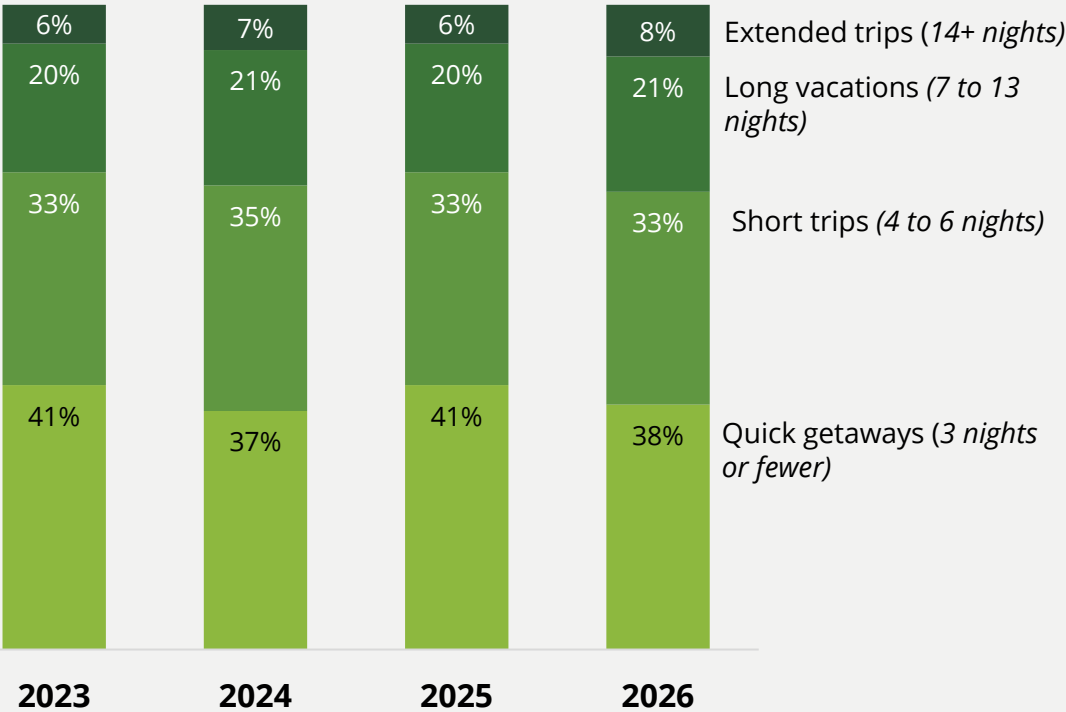
Travelers with household income over \$100,000 are **over 1.5 times as likely to significantly increase marquee trip budgets** over last year

Budgets vs. 2025	Under \$100K	\$100K to \$199K	Over \$200K
Significantly more	17%	30%	26%
About the same	69%	63%	63%
Significantly less	14%	8%	11%

Note: Question: "How much is the estimated budget for your longest summer trip?" (Please include only your transportation and lodging costs in this estimate) (n = 1,808). Source: 2026 Deloitte Summer Travel Survey.

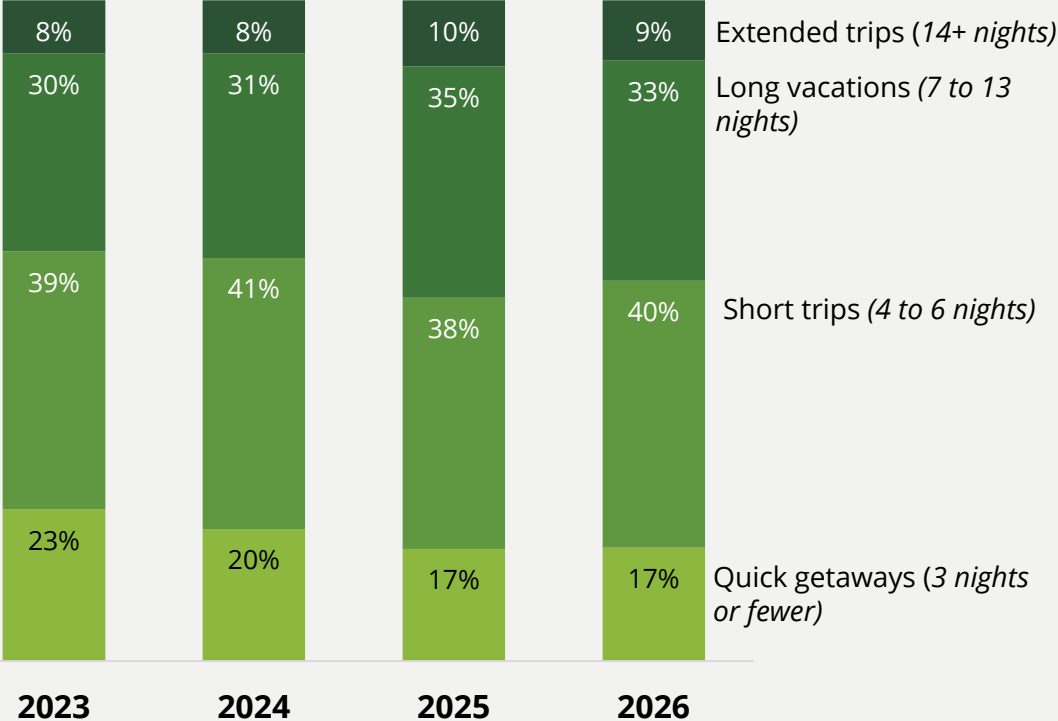
# Trip length across the season is up slightly and marquee trips are a bit shorter, as travelers put incremental dollars toward the trip experience

**All summer trips, share by length, 2023 to 2026**



Note: Question: (1) "How many of your summer trips will be...?" (n = 1,808).  
Source: 2026 Deloitte Summer Travel Survey.

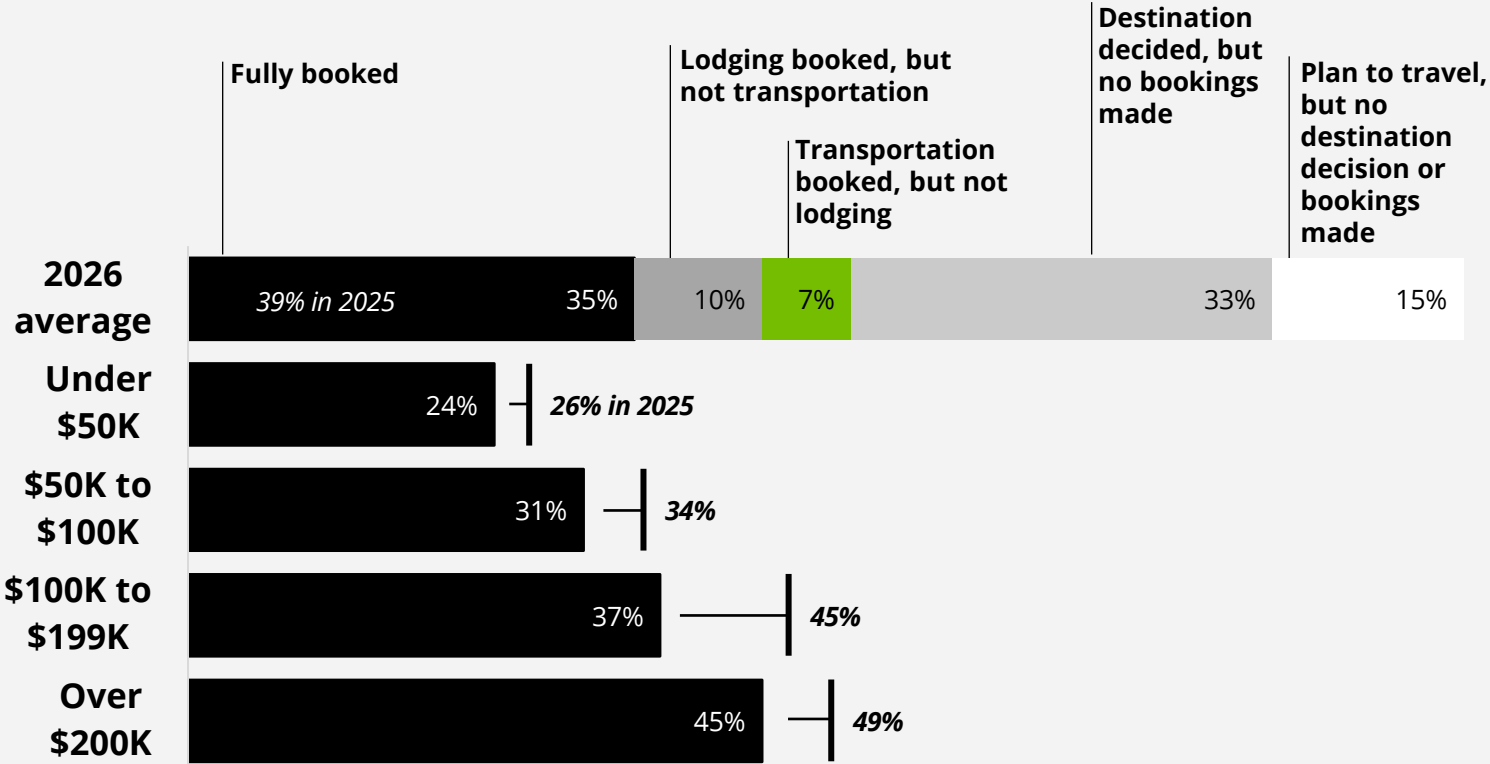
**Marquee summer trip, share by length, 2023 to 2026**



Note: Question: (2) "How long will your longest trip this summer be?" (n = 1,808).  
Source: 2026 Deloitte Summer Travel Survey.

**In a possible signal of concern about high prices, fewer travelers have fully booked their marquee trips, with the drop most prominent among the \$100K to \$199K income group**

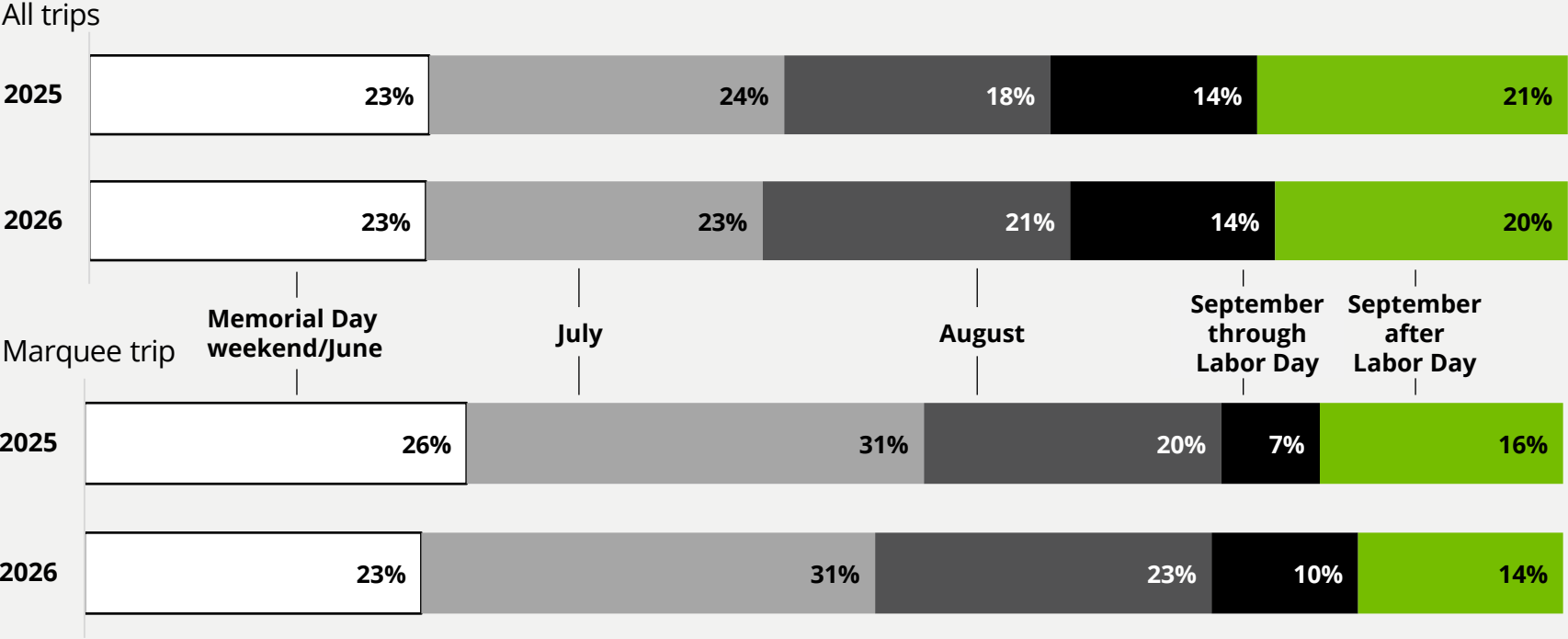
**Booking status of marquee summer trips**



Note: Question: "Thinking of the longest trip you will take this summer, how would you describe your progress in planning and booking this trip?" (n = 1,808).  
 Source: 2026 Deloitte Summer Travel Survey.

# Travel volume shifts slightly toward later in the summer, while the post-Labor Day period mostly holds onto gains it has made in recent years

## Timing of summer trips



The share of summer trips taking place **post-Labor Day** has climbed from 12% in 2022 to 20% in 2026

**Boomers are major drivers of post-Labor Day travel.** More than 1 in 4 say their marquee trip will happen in this period, versus 1 in 10 younger travelers.

Notes: Questions: (1) "How many of your summer trips will begin in each of the following time periods?"; (2) "When will your marquee summer trip take place? If your trip spans more than one of the provided dates, select the option that reflects a majority of your trip"; n = 1,808 for both questions. Source: 2026 Deloitte Summer Travel Survey.

# Travel products

Transportation, lodging,  
and activities

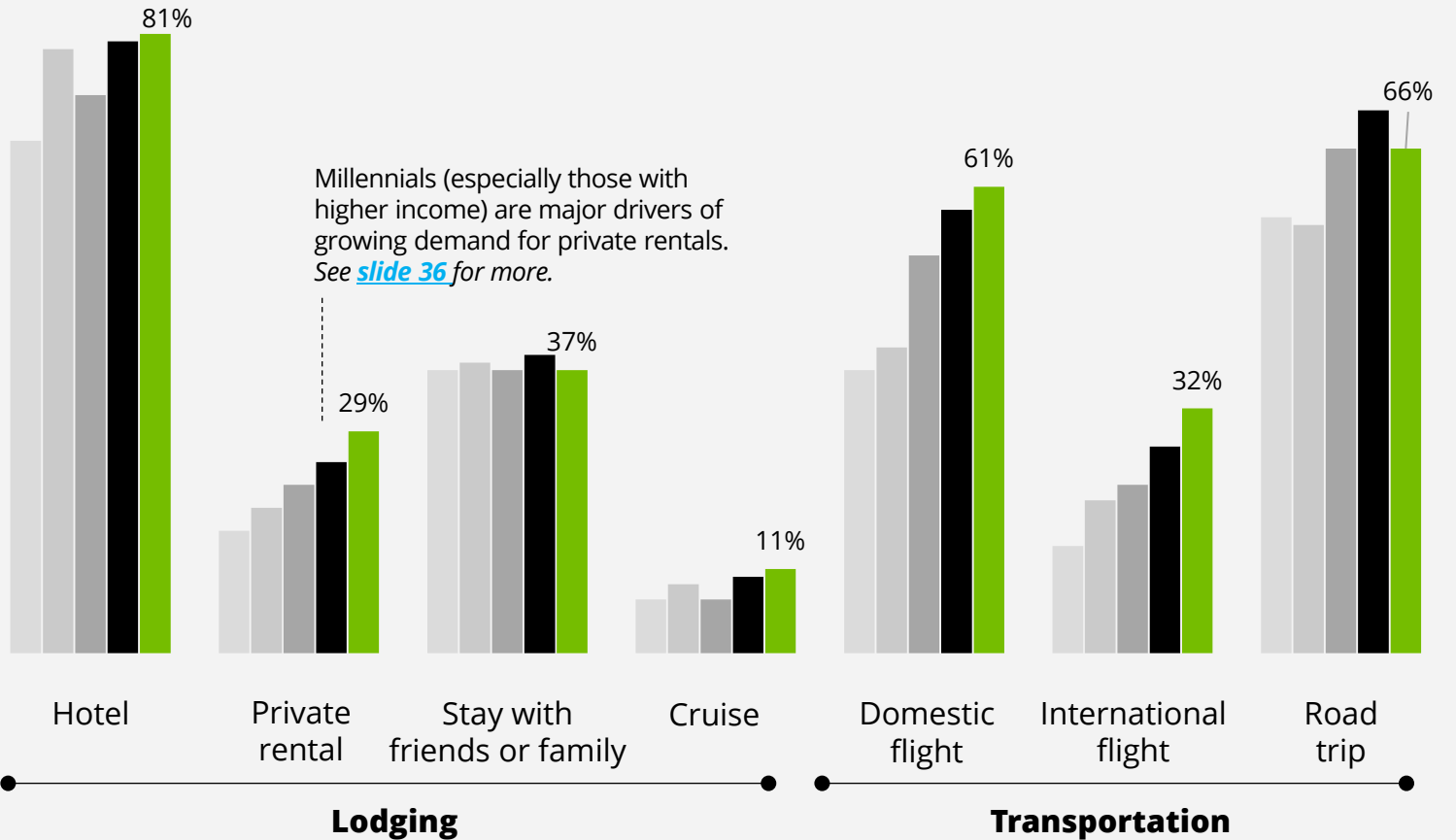


# Travelers' uptake of hotels, rentals, flights, and cruises holds steady, thanks to a larger share of high-income travelers, along with overall willingness to spend on travel

## Travel segment usage, full summer

Percentage of US travelers using each segment across summer trips

● 2022 ● 2023 ● 2024 ● 2025 ● 2026

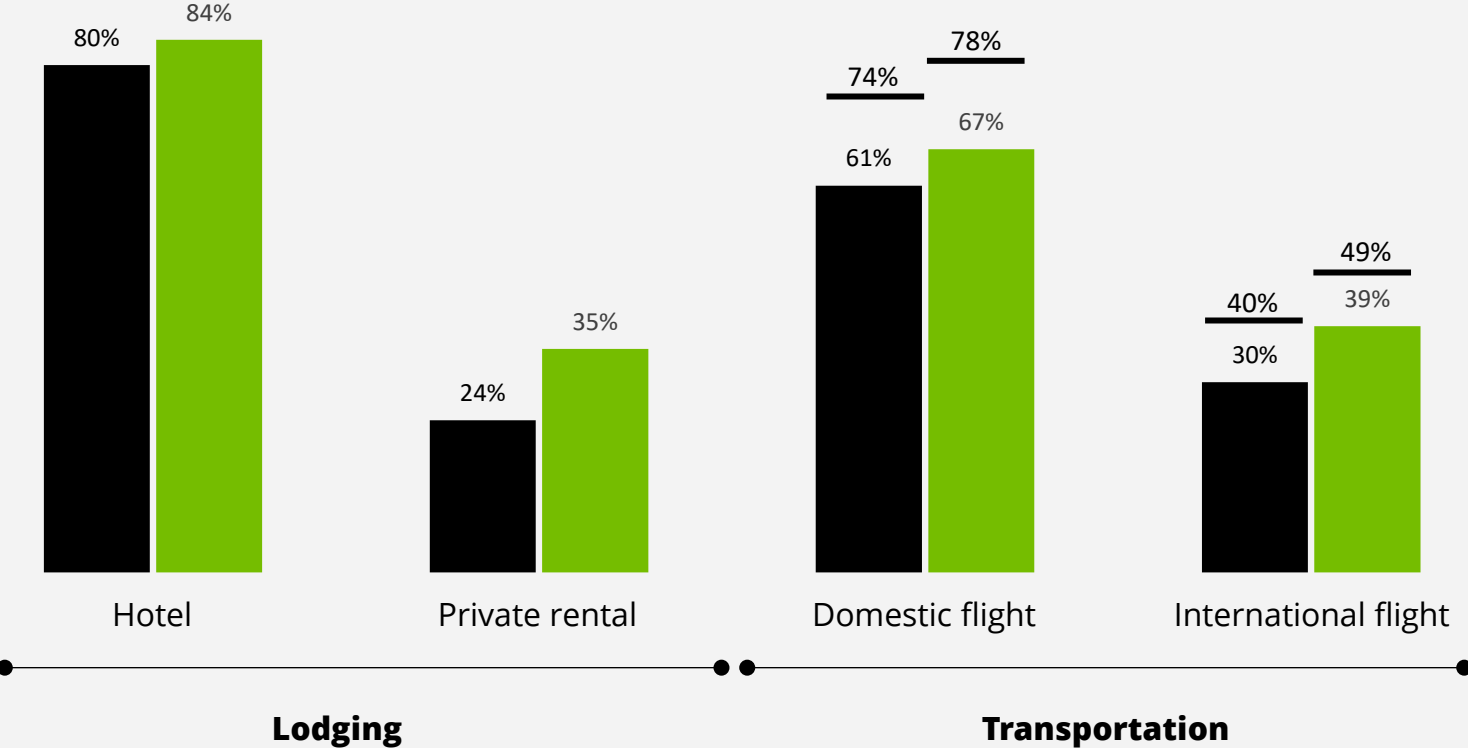


Note: Question: "Across your travels this summer, which accommodation/transportation options are you likely to use?" (Select all that apply) (n = 1,948).  
Source: 2026 Deloitte Summer Travel Survey.

# Americans with household income of \$100K to \$199K show fastest intent growth in demand for hotels, rentals, and flights

**Travel segment usage, full summer, \$100K to \$199K household income**  
*Percentage of US travelers using each across summer trips*

● 2025 ● 2026 — Intent among \$200K+ income group



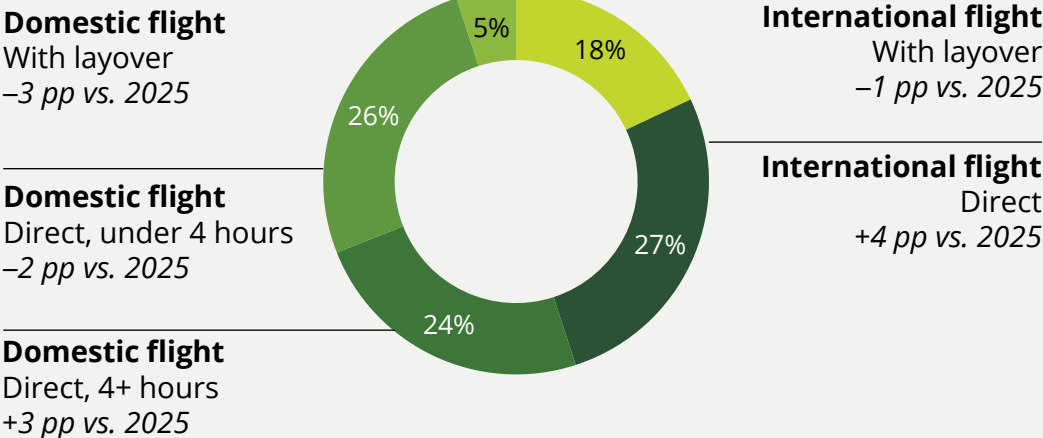
Note: Question: "Across your travels this summer, which accommodation/transportation options are you likely to use?" (Select all that apply) (n = 1,948).  
 Source: 2026 Deloitte Summer Travel Survey.

# Longer direct flights, whether domestic or international, gain some share over more complex itineraries

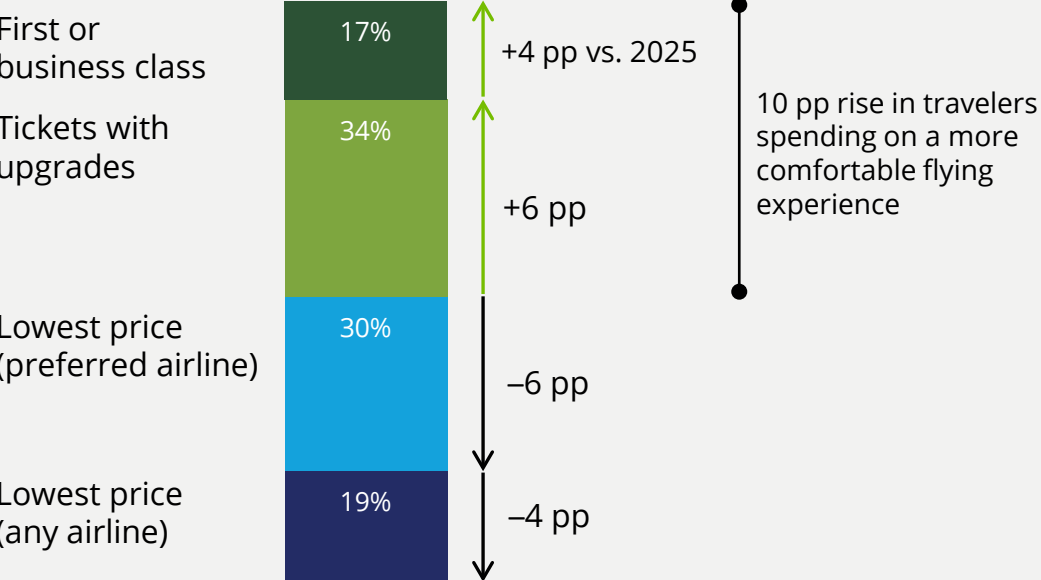
With a higher-income traveling population and a willingness to spend on comfort, the front of the plane continues to see strong leisure intent, with a jump in first class and other premium fares purchased for marquee trips

## Flight type, marquee summer trip

**57%** of travelers will fly on their longest trip (versus 55% in 2025 and 51% in 2024 and 2023)



## Type of airfare booked or planned



Notes: Questions: (1) "Which transportation option(s) will you be using to reach your destination during this trip?" (Please select all that apply); (2) "Which of the following best describes your flight?"; (3) "Which best describes the airfare that you have booked/are planning to book?"; n = 1,023 travelers flying on their longest trip; pp stands for percentage points. Source: 2026 Deloitte Summer Travel Survey.

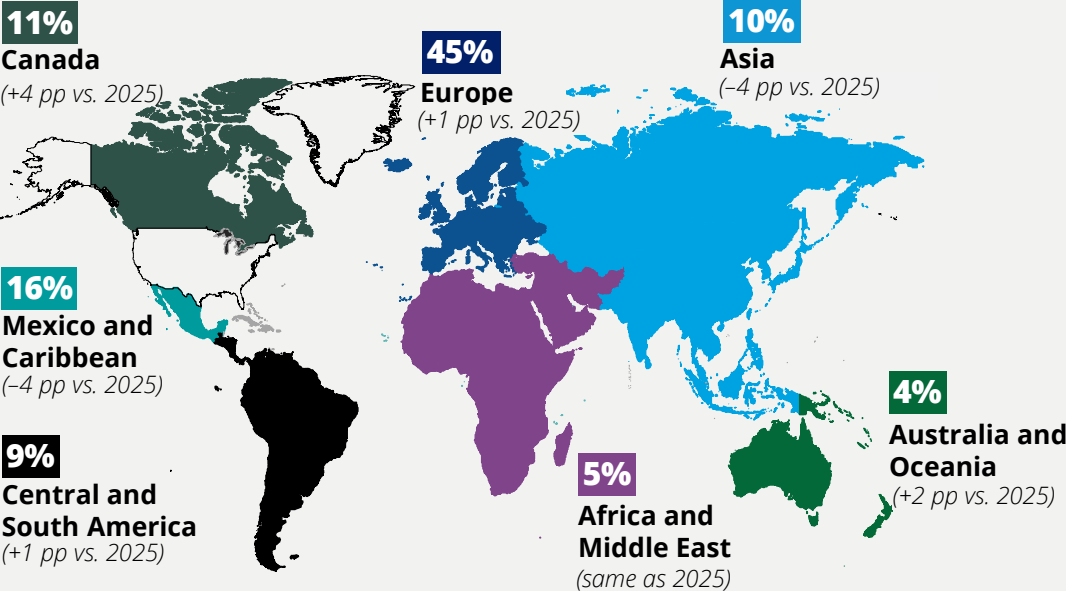
# Europe holds its share as the international destination of choice, while the balance of trips within North America shifts toward Canada

Luxury travelers and millennials are among the groups showing high international travel intent

**Percentage of group traveling internationally for marquee trip**



**Destination for international marquee trip, by region**

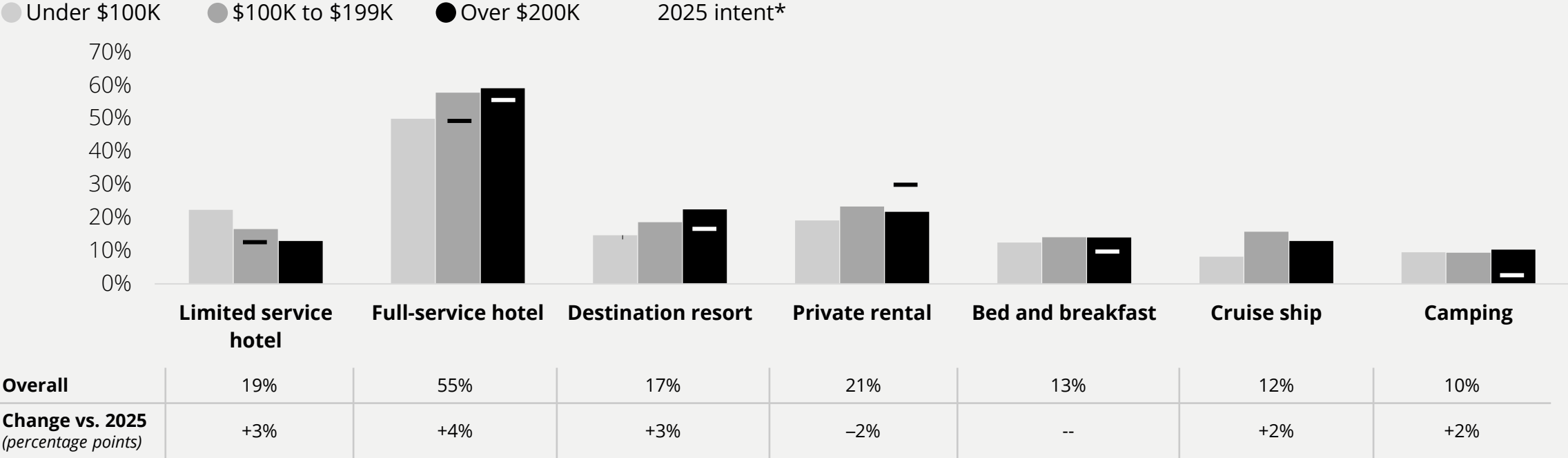


Notes: Question: "Which international region will you be flying to?" (n = 458 planning to travel internationally on their longest trip of the season); pp stands for percentage points; \*Early bookers are respondents whose longest trip of summer 2026 was fully booked (air and lodging) when the survey was fielded.  
Source: 2026 Deloitte Summer Travel Survey.

# Regardless of income, travelers show sustained interest across most accommodation types

Higher-income Americans may be looking for more service and on-property amenities for their marquee trips, shifting away from private rentals and toward destination resorts, full-service hotels, and bed and breakfasts

**Accommodations for marquee summer trip, by income**

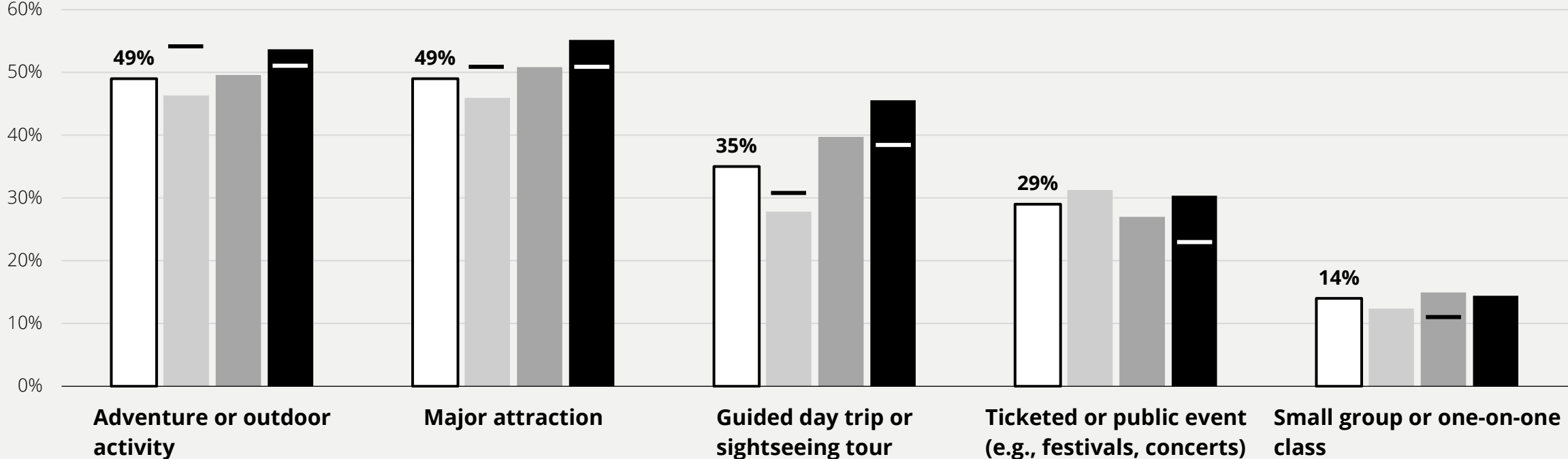


Notes: Question: "Which type of lodging are you planning to stay at or considering for your longest trip of the summer?" (Select all that apply) (n = 1,808); \*2025 incidence is only noted where there is a notable shift.  
 Source: 2026 Deloitte Summer Travel Survey.

# In-destination providers can expect higher demand from higher-income travelers, but a more conservative approach at the lower end

Participation in in-destination travel activities, lodging travelers

○ Average   ● Under \$100K   ● \$100K to \$199K   ● Over \$200K   — 2025 intent\*



Notes: Question: "Which of the following experiences are you likely to participate in on this trip?" (Select all that apply) (n = 1,808);\*2025 incidence is only noted where there is a notable shift.  
 Source: 2026 Deloitte Summer Travel Survey.

# Reliability rises as a driver of airline choice, while price declines in importance—but still leads

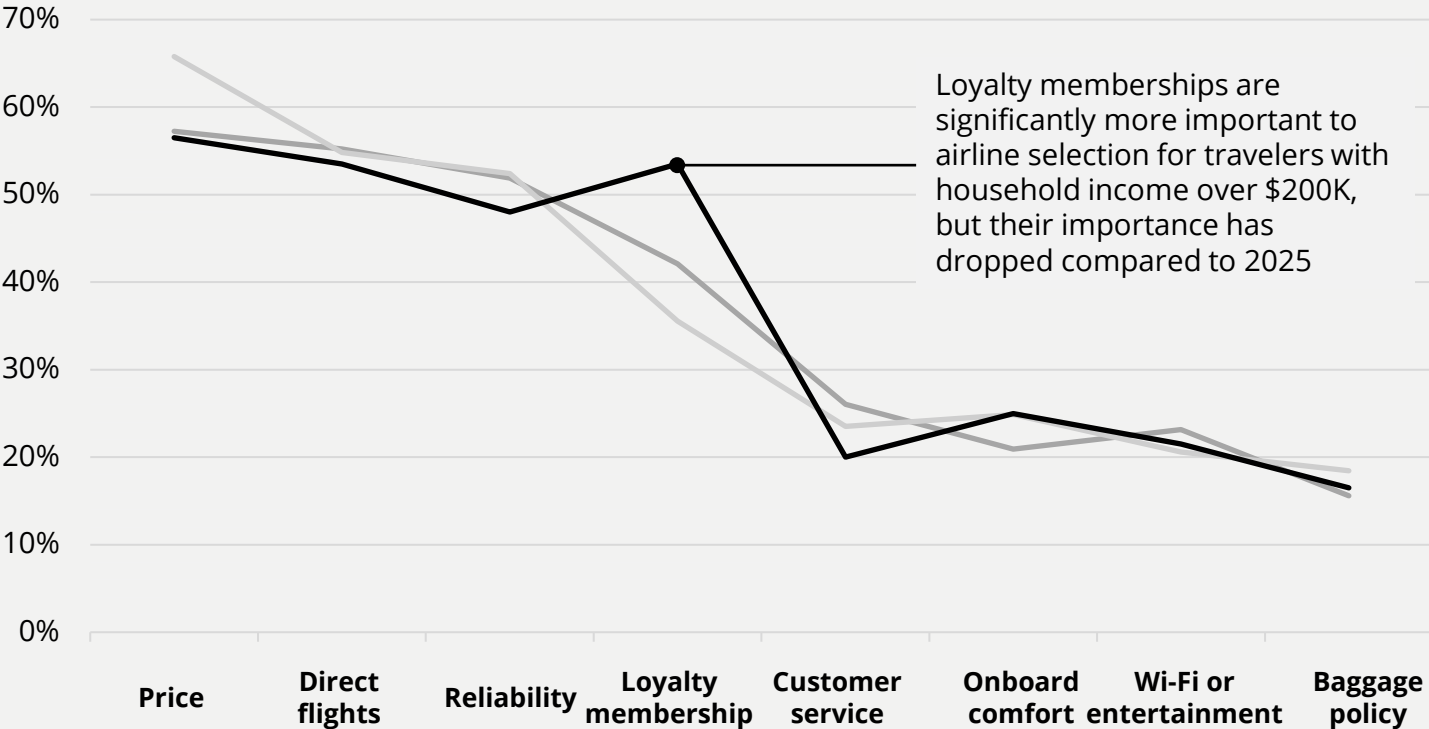
### Leading airline selection factors

Top 3

	2025		2026
Price	65%	↓	60%
Direct flights	58%		55%
Reliability	44%	↑	51%
Loyalty memberships	45%		42%
Customer service	23%		24%
Onboard comfort	24%		23%
Wi-Fi or entertainment	16%	↑	22%
Baggage policy	21%	↓	17%

### Leading airline selection factors, by income

● Under \$100K   ● \$100K to \$199K   ● Over \$200K



Note: Question: "Which of the following factors are most important to your airline selection for this trip?" (Please rank your top 3 considerations) (n = 1,023).  
Source: 2026 Deloitte Summer Travel Survey.

# Price sensitivity also declines in lodging, and as with air, loyalty's influence drops for higher-income travelers

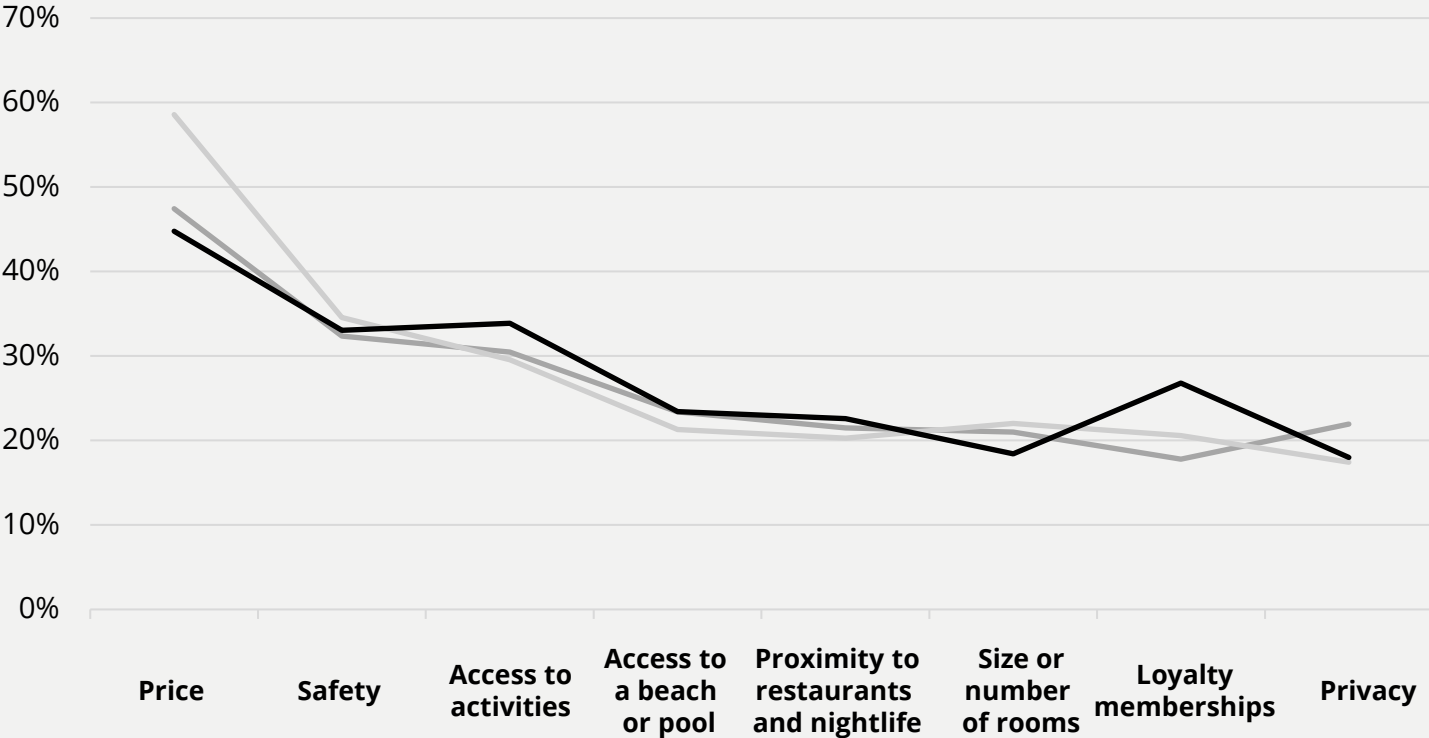
## Leading lodging selection factors

Top 3

	2025	2026
Price	55%	52%
Safety	33%	33%
Access to activities	31%	31%
Access to a beach or pool	24%	22%
Proximity to restaurants and nightlife	22%	21%
Size or number of rooms	24%	21%
Loyalty memberships	21%	20%
Privacy	20%	19%
Customer service	18%	17%

## Leading hotel selection factors, by income

● Under \$100K ● \$100K to \$199K ● Over \$200K



Note: Question: "Which of the following factors are most important to your lodging selection for this trip?" (Please rank your top 3 considerations) (n = 1,563).  
 Source: 2026 Deloitte Summer Travel Survey.

# When selecting a casino hotel or resort, men and women report different priorities

## 1 in 5

travelers are planning or considering a stay in a casino property this summer. Casino consideration and priorities are similar across income levels.

Some notable differences in priorities occur across generations:

**Boomers:** 39% cite **loyalty rewards**, and 70% **casino gaming**

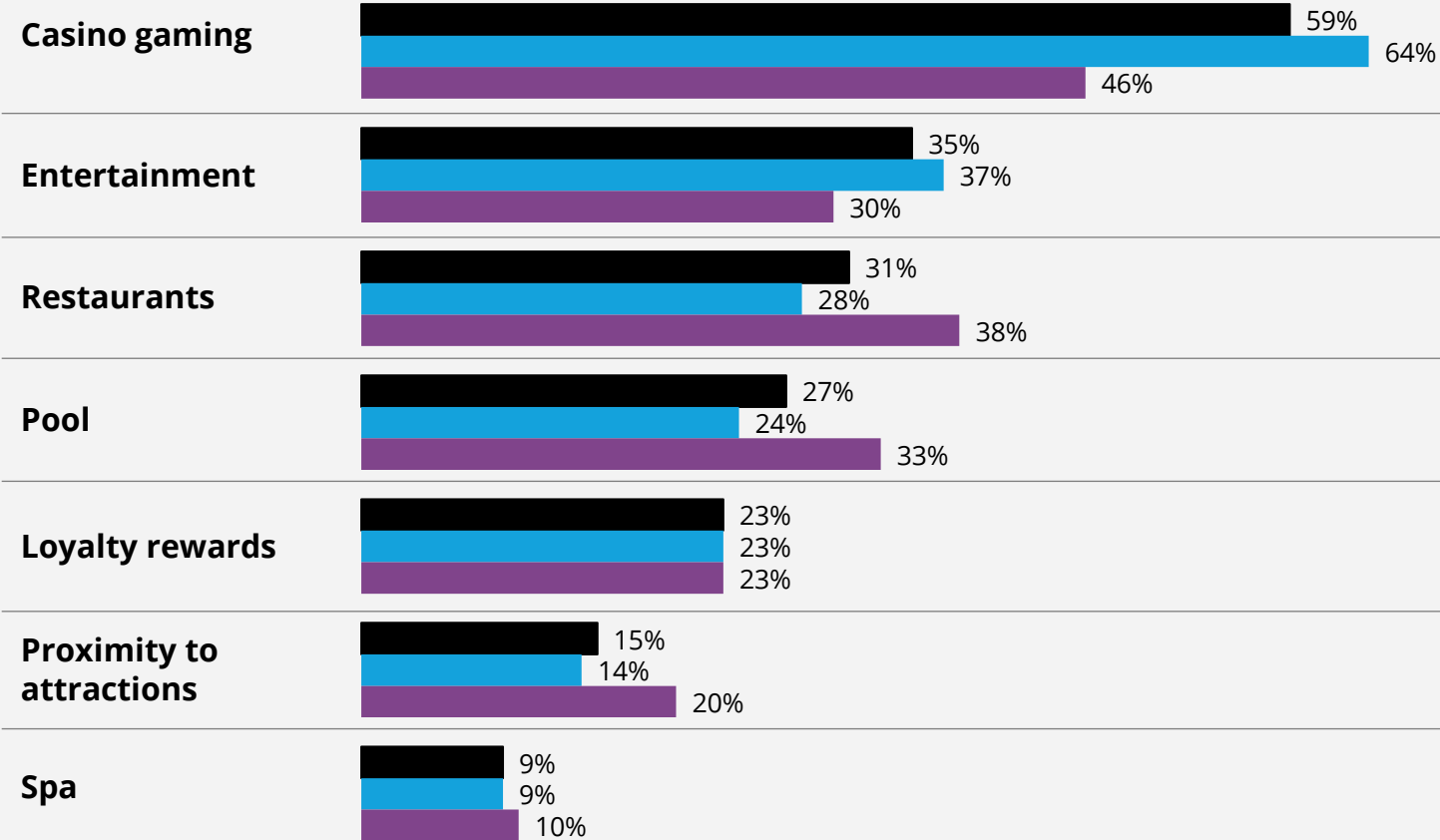
**Gen X:** 66% cite **casino gaming**

**Millennials:** 34% prioritize **the pool**, 41% **entertainment**

**Gen Z:** **Restaurants** (37%) and **entertainment** (43%) are more important than they are to other generations

**Top two casino property attributes, women vs. men**

● Overall ● Women ● Men



Note: Question: "Which of the following amenities or features are most important to you in choosing a casino property?" (Select top two) (n = 404 travelers planning or considering a stay at a casino hotel/resort in summer 2026). Source: 2026 Deloitte Summer Travel Survey.

# From inspiration to booking



# Gen Zs, the biggest users of short social video in trip planning, are using the platform a little differently this year

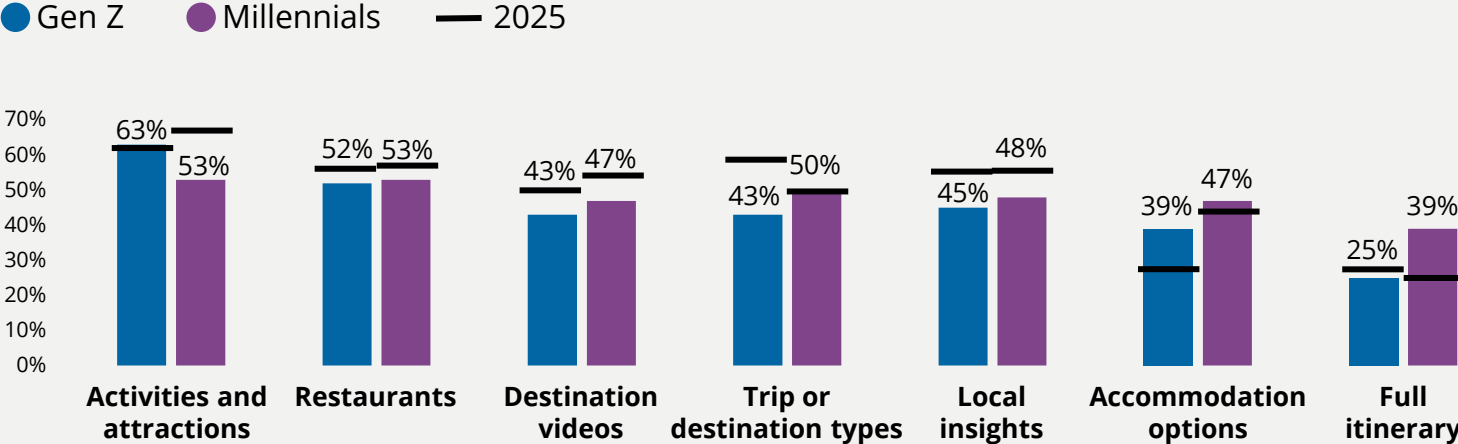
Broad inspiration still accounts for a large amount of travel video consumption, but more are using it for practical trip planning, searching full itineraries, and stay options

## Short social video app adoption in travel planning



Notes: Question: "Which of the following do you use for travel inspiration and information?" (Please select all that apply);(n = 419 short social video content users).  
Source: 2026 Deloitte Summer Travel Survey.

## Short social video content types used in discovery and trip planning



Note: Question: "How have you used short social video apps in travel discovery or planning?" (Please select all that apply) (n = 419 short social video content users).  
Source: 2026 Deloitte Summer Travel Survey.

# Millennials lead surging gen AI adoption, but travelers still like to shop around

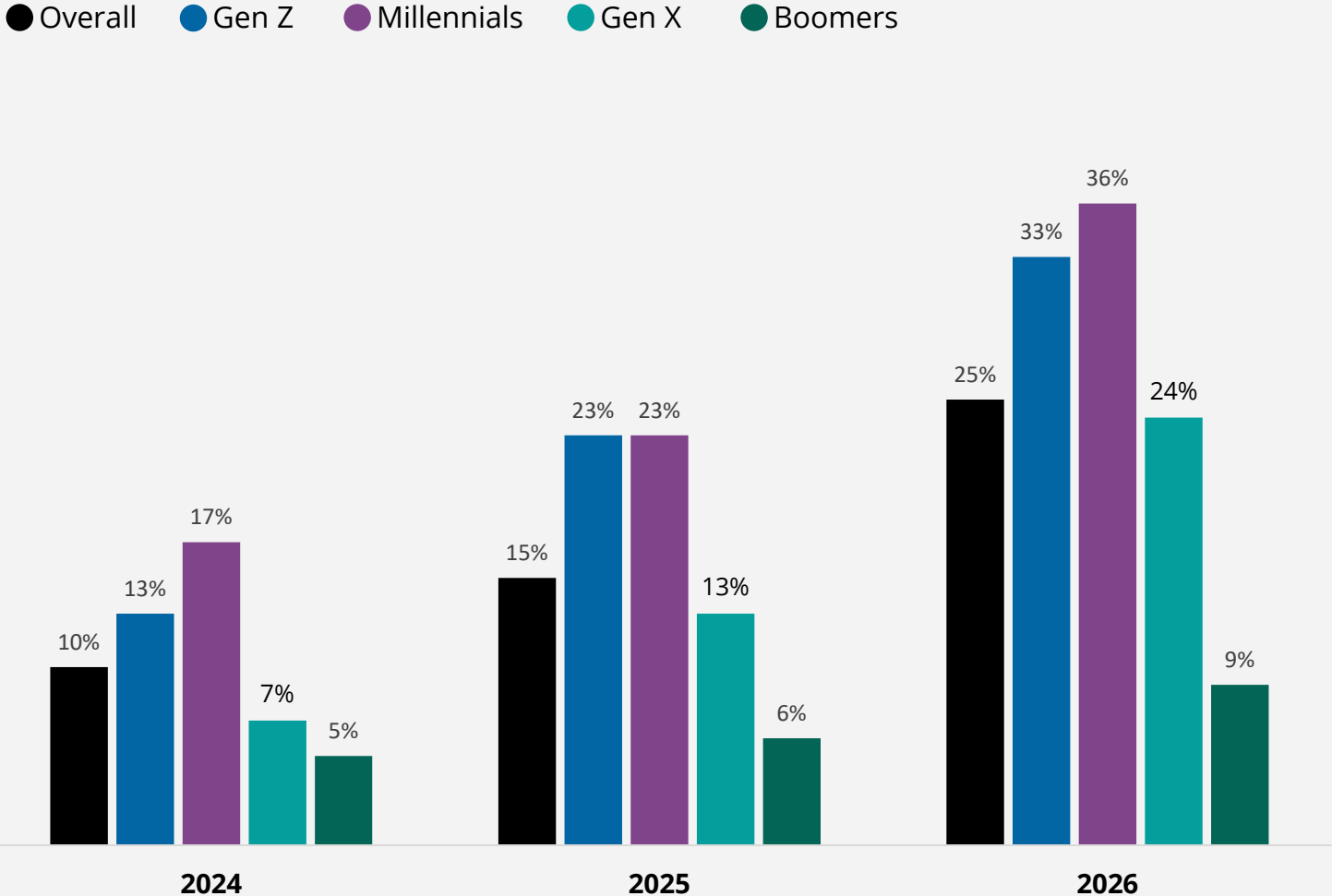
Most travelers are not looking for the ultimate travel research shortcut. Only **1 in 10 say they find travel research frustrating**, and **26% say they want a one-stop shop**. On the other hand, 57% say they enjoy researching options on various travel sites.

Even as large platforms lead, **users still engage with an average of 2.5 different types of gen AI travel tools**, suggesting that discovery, comparison, and variety remain central to the travel planning experience.

Gen AI platform types used for trip planning, percentage of gen AI travel researchers

Standalone gen AI tool	64%
Search engine	52%
Online travel agency	36%
Social media	35%
Hotel site or app	34%
Airline site or app	30%

Percentage using gen AI in travel research by generation, 2024 to 2026



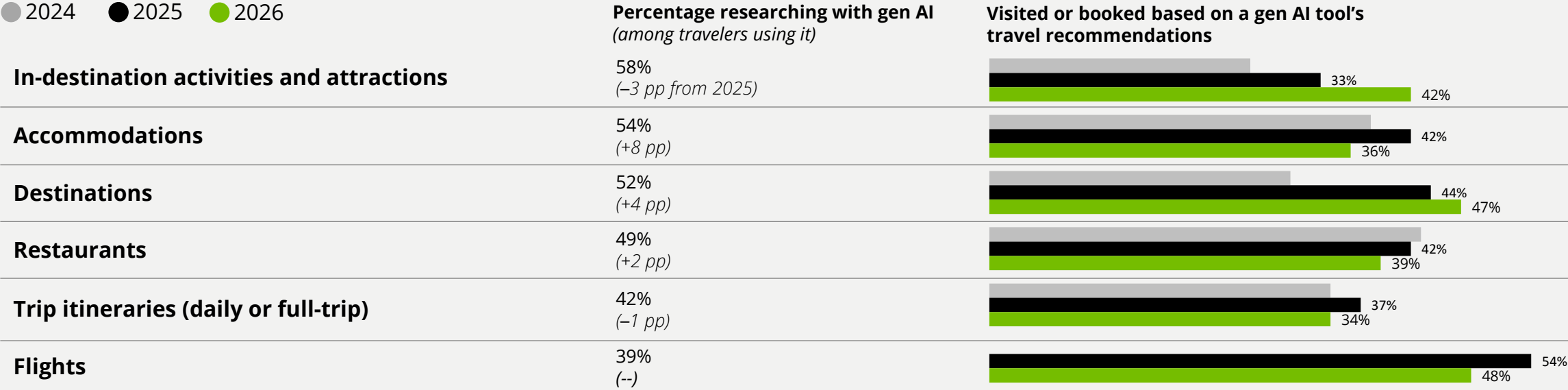
Notes: Questions: (1) "Which of the following do you use for travel inspiration and information?" (n = 1,808 travelers); (2) "Where have you accessed gen AI to do travel research?" (n = 446 users of gen AI in travel planning).  
Source: 2026 Deloitte Summer Travel Survey.

# Travelers use gen AI to gather information across aspects of the travel experience, and follow-through grows in some categories but contracts in others

The most popular categories for gen AI research are complex, destination-dependent decisions—activities, attractions, and accommodations. Over the past year, follow-through on activity and attraction recommendations leapfrogged from a laggard to a leader.

## Gen AI use cases and conversion to action

● 2024 ● 2025 ● 2026



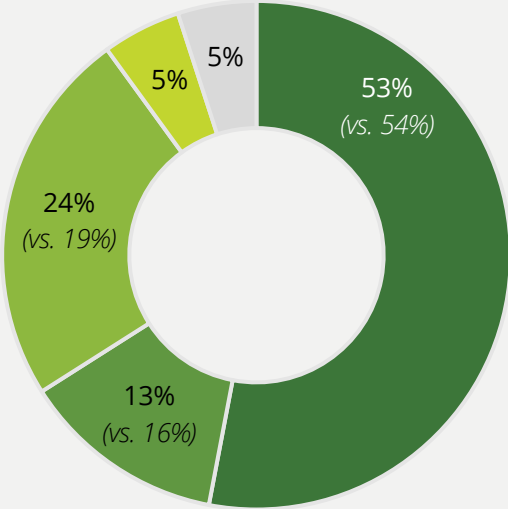
Notes: Questions: (1) “Which of the following do you use for travel inspiration and information?”; (2) “Where have you accessed gen AI to do travel research?”; (3) “How have you used gen AI tools in travel discovery or planning?”; (4) “Which, if any, actions have you taken based on a gen AI tool's travel recommendations?”; n = 446 users of gen AI in travel planning; pp stands for percentage points.  
Source: 2026 Deloitte Summer Travel Survey.

# A challenging pricing environment gives online travel agencies a boost among lodging shoppers, with higher adoption across income levels

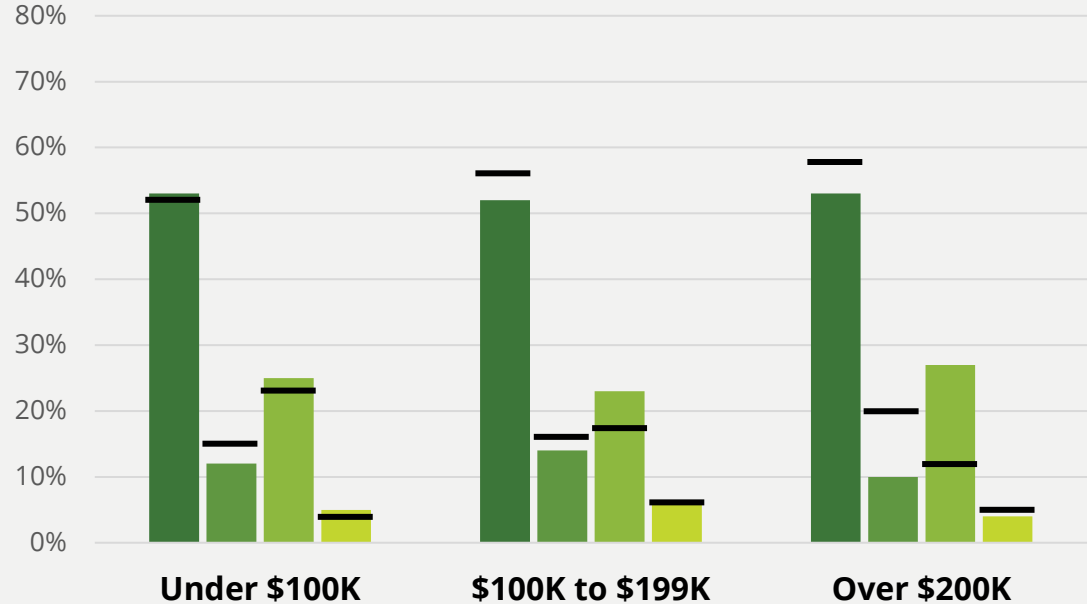
## Lodging booking channel

● Hotel site or app  
 ● Private rental site  
 ● Online travel agency  
 ● Traditional agent  
 ● Other  
 — 2025 intent

All travelers



Travelers by income



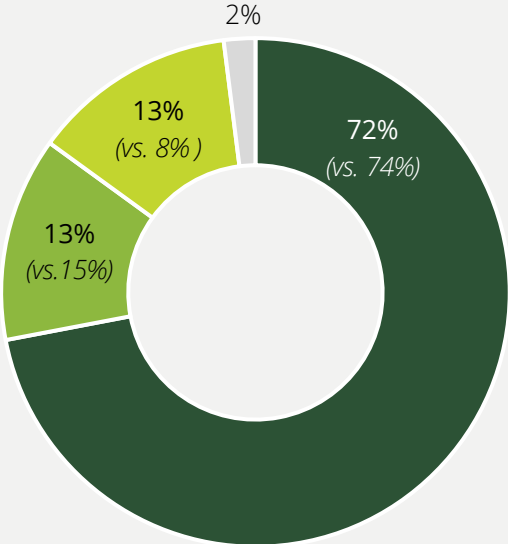
Note: Question: "Which channel did you or do you plan to use to book your lodging/flight for this trip?" (n = 1,563 travelers planning to book lodging; n = 1,023 travelers planning to book flights).  
 Source: 2026 Deloitte Summer Travel Survey.

# Traditional agents account for just 13% of marquee flight bookings, but make gains led by lower- and middle-income travelers

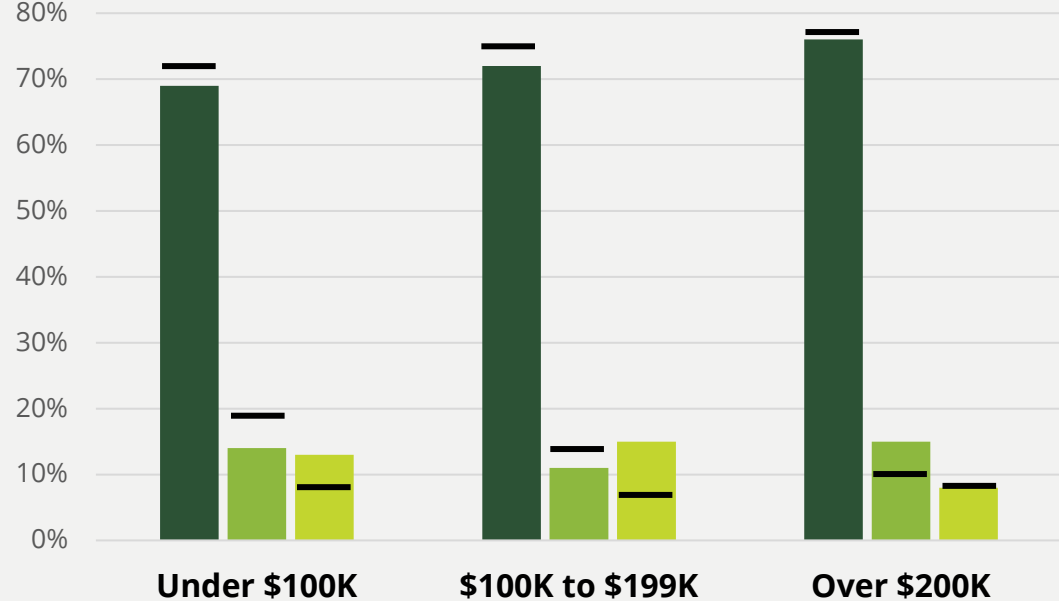
## Air booking channel

● Airline site or app   
 ● Online travel agency   
 ● Traditional agent   
 ● Other   
 — 2025 intent

All travelers



Travelers by income



Note: Question: "Which channel did you or do you plan to use to book your lodging/flight for this trip?" (n = 1,563 travelers planning to book lodging; n = 1,023 travelers planning to book flights). Source: 2026 Deloitte Summer Travel Survey.

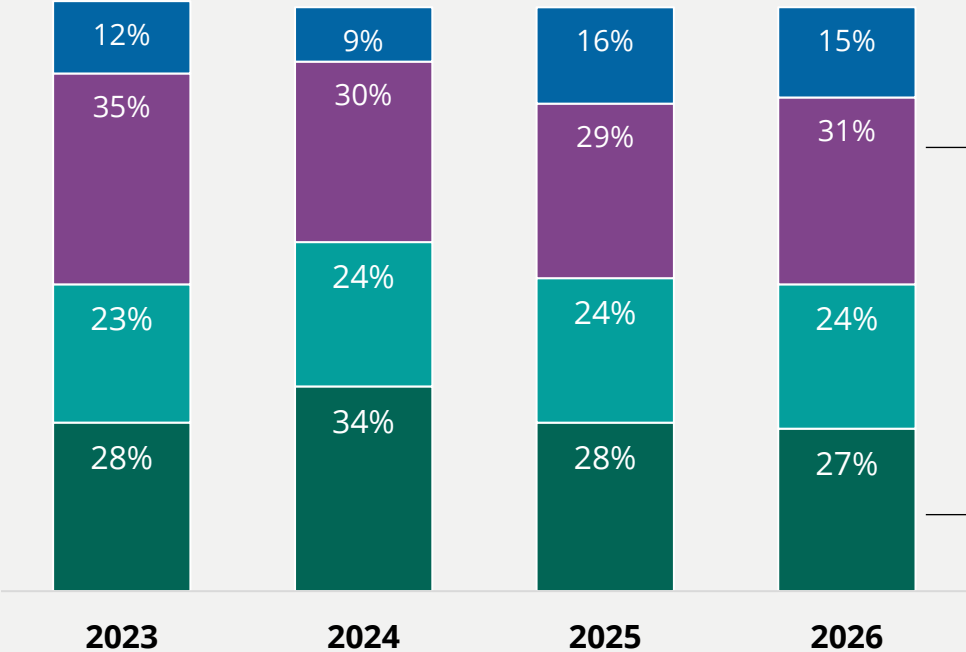
# Generational trends



# The traveling population mix by generation remains roughly consistent, but Gen Z growth stalls a bit as millennials gain

Traveling population share, by generation

● Gen Z ● Millennials ● Gen X ● Boomers

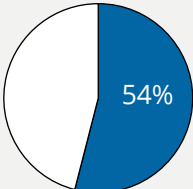
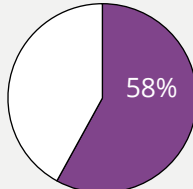
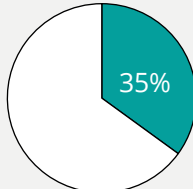
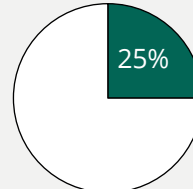


Millennials are major shapers of travel demand in 2026. They represent almost a third of travelers, and have the biggest budgets. For more on high-earning millennials' unique travel tendencies, see [slide 36](#).

Boomers seem most impacted by the rise in travel and everyday prices. They have the weakest financial perceptions, and are the only generation cutting back on travel budgets. See [slide 35](#) for more.

Note: Question: "What activities are you planning to partake in summer 2026 (between Memorial Day and the end of September)?" (n = 1,808). Source: 2026 Deloitte Summer Travel Survey.

# The two youngest generations ride rising financial perceptions to higher frequency and spend. Gen X exhibits a more mixed pattern, while boomers take a step back.

	Gen Z	Millennials	Gen X	Boomers
Feel financial situation has improved versus 2025				
<b>Number of summer trips</b>	3.4 (+19% vs. 2025) ↑	3.3 (+5%) ↑	2.9 (-9%) ↓	2.8 (-13%) ↓
<b>Marquee trip budget</b>	\$3,822 (+18% vs. 2025)	\$4,396 (+33%)	\$4,071 (+31%)	\$3,857 (-5%)
<b>International travel during the summer</b>	26%	28%	19%	13%
<b>Activities planned for longest trip</b>	2.17	2.24	1.87	1.54
<b>Enjoy online travel research</b>	49%	50%	39%	24%

Notes: Questions: (1) "Thinking about your household's current financial situation, would you say it is better/same/worse?"; (2) "How many trips do you plan to take this summer?"; (3) "How much is the estimated budget for your longest summer trip?" (Please include only your transportation and lodging costs in this estimate); (4) "How many of your summer trips are international?"; (5) "Which of the following experiences are you likely to participate in on this trip?"; (6) "In general, how do you feel about travel planning?"; n = 1,808.  
Source: 2026 Deloitte Summer Travel Survey.

# High-earning millennials are poised to have an outsized impact on travel in summer 2026

Millennials with income of over \$200,000 have significantly above-average travel ambitions...

...their gen AI usage, private rental uptake, luxury travel, and laptop lugging are all above average compared to other generations at the same income level

**82%** plan to travel this summer, compared to 49% of all others

**1.8X** as likely to use **gen AI in travel planning**

**3.73** trips planned this summer, 23% more than others

**41%** plan a **private rental stay this summer**, 13 percentage points more than the rest

**\$6,559** average budget for longest trip, 67% more than the rest

**51%** plan **luxury stays in 2026**, compared to 27% of all others

**2X** as likely to **travel internationally on their marquee summer trip** as others

**65%** are **laptop luggers** (work on at least part of their marquee trip), versus 33% of all others

Notes: Questions: (1) "What activities are you planning to partake in during summer 2026 (between Memorial Day and the end of September)?" (2) "How many trips have you booked or are considering taking this summer?" (3) "How much is the estimated budget for your longest summer trip?" (Please include only your transportation and lodging costs in this estimate); (4) "In 2026, on how many personal leisure trips do you plan to stay in a hotel with an average nightly rate of \$400 or more? If you have already stayed in such a hotel for leisure so far in 2026, please count those trips as well"; (5) "Which of the following do you use for travel inspiration and information?" (Please select all that apply); (6) "Across your travels this summer, which accommodation options are you likely to use?" (Select all that apply); (7) "Which of the following best describes your flight?"; (8) "Do you plan to work during your longest leisure trip this summer?"; n = 117 millennials with income over \$200,000; n = 96 millennials with income over \$200,000 who are traveling. Source: 2026 Deloitte Summer Travel Survey.

# High-earning millennials are packing their trips with more activities than other travelers

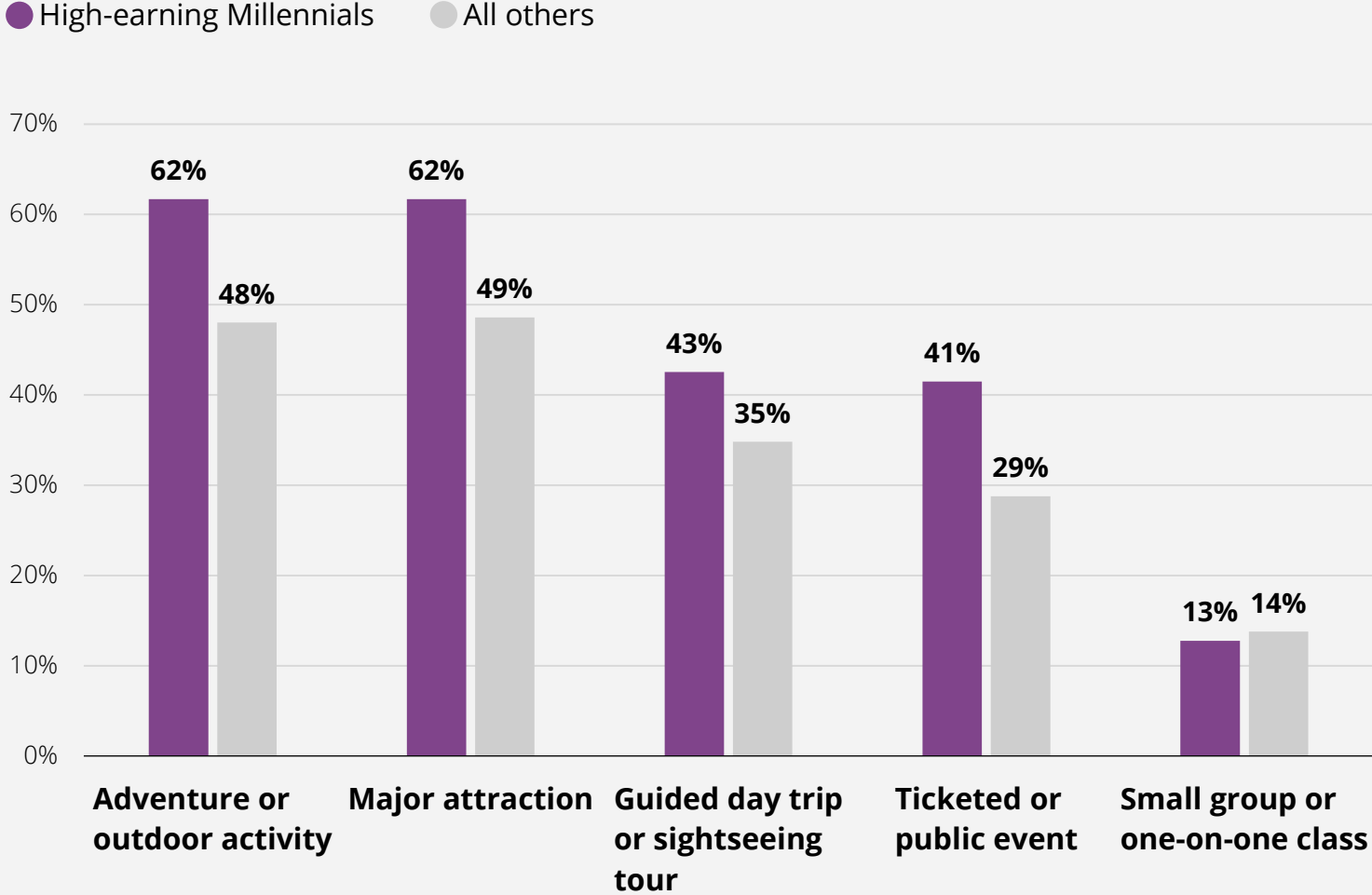
**25%**

more travel activity types planned for their marquee trips than other travelers

**1.2X to 1.4X**

participation rate in most travel activities compared to other travelers

## Participation in in-destination travel activities



Note: Question: "Which of the following experiences are you likely to participate in on this trip?" (Select all that apply) (n = 117 millennials with income over \$200,000; n = 96 millennials with income over \$200,000 who are traveling).  
Source: 2026 Deloitte Summer Travel Survey.

# Travel trends in brief

Luxury, loyalty, and laptop lugging



# Room comfort and service stand out as leading hallmarks of luxury, while perceptions of other drivers are more fragmented

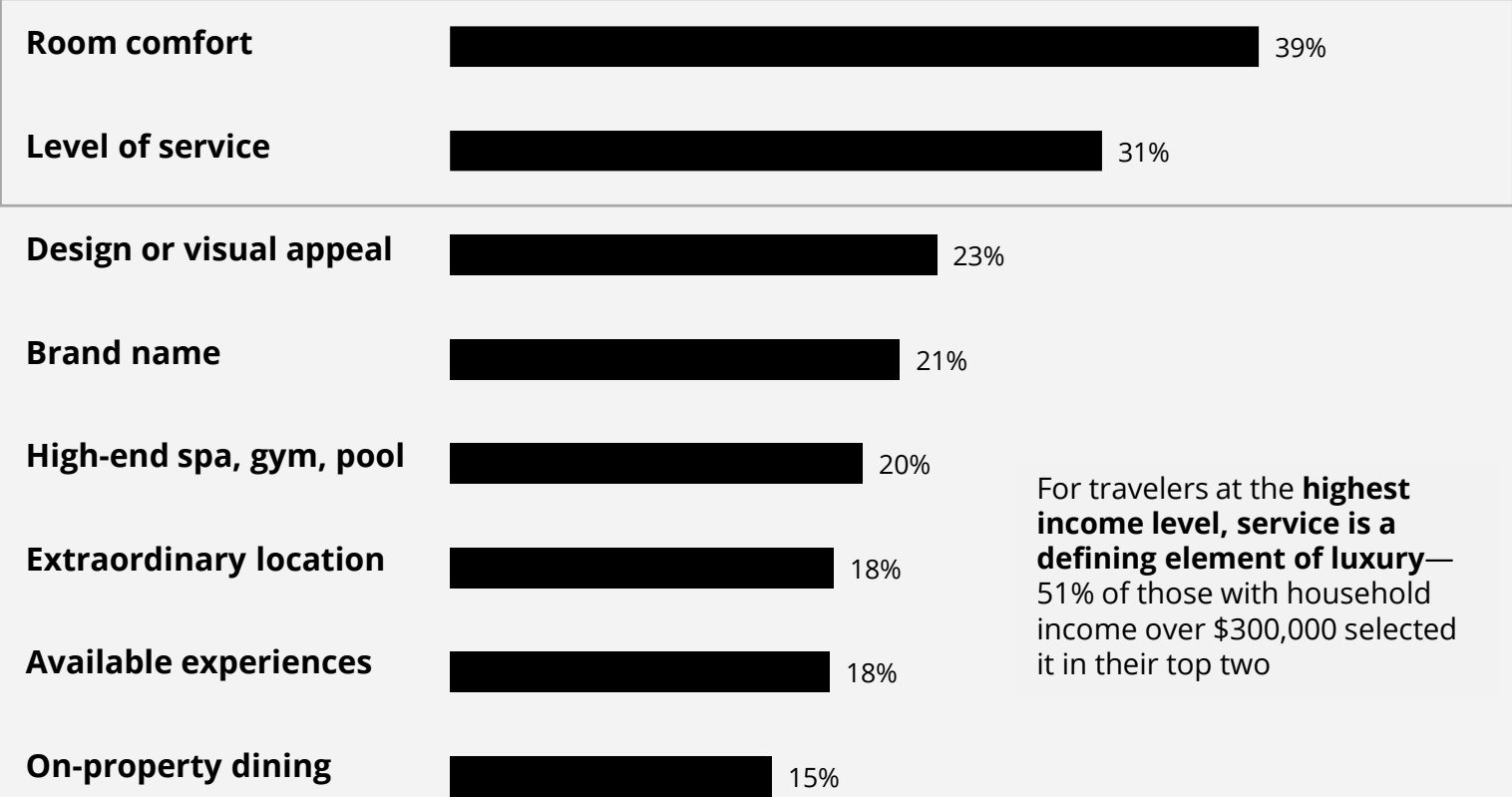
**28%**

of summer 2026 travelers plan luxury stays sometime this year

*Luxury travelers turn to gen AI for trip research at twice the rate of other travelers, and are also bigger users of social media and short video content in trip planning (1.3X)*

## What makes a property luxurious?

Percentage of luxury travelers\* selecting the top two attributes contributing to property luxuriousness

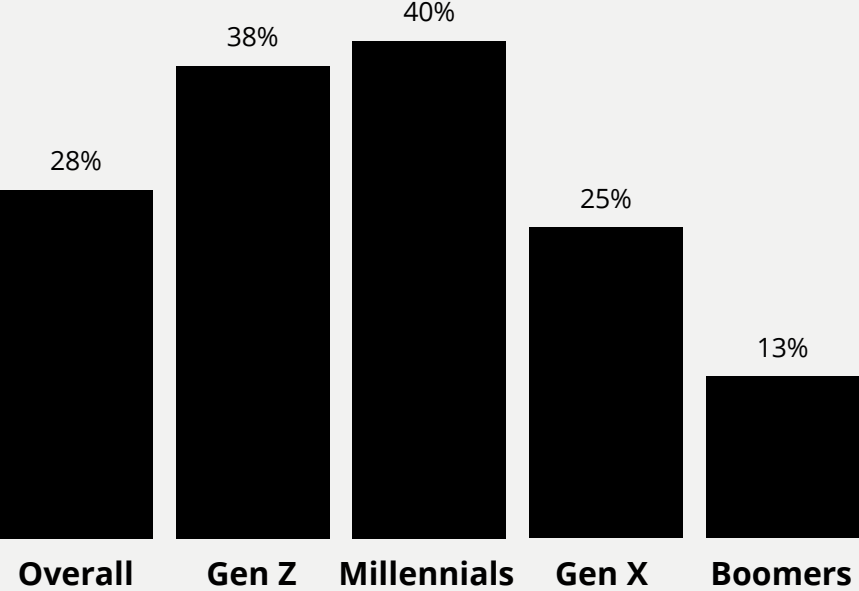


For travelers at the **highest income level, service is a defining element of luxury**—51% of those with household income over \$300,000 selected it in their top two

Notes: Questions: (1) "In 2026, on how many personal leisure trips do you plan to stay in a hotel with an average nightly rate of \$400 or more? If you have already stayed in such a hotel for leisure so far in 2026, please count those trips as well"; (2) "Thinking of the most luxurious lodging you have stayed in the past two years, which two attributes of the property did you feel most contributed to its luxuriousness?"; n = 509 luxury travelers; \*Travelers who have stayed at a property they consider luxurious in the past two years and plan to stay at a property charging at least \$400 per night qualify as luxury travelers. Source: 2026 Deloitte Summer Travel Survey.

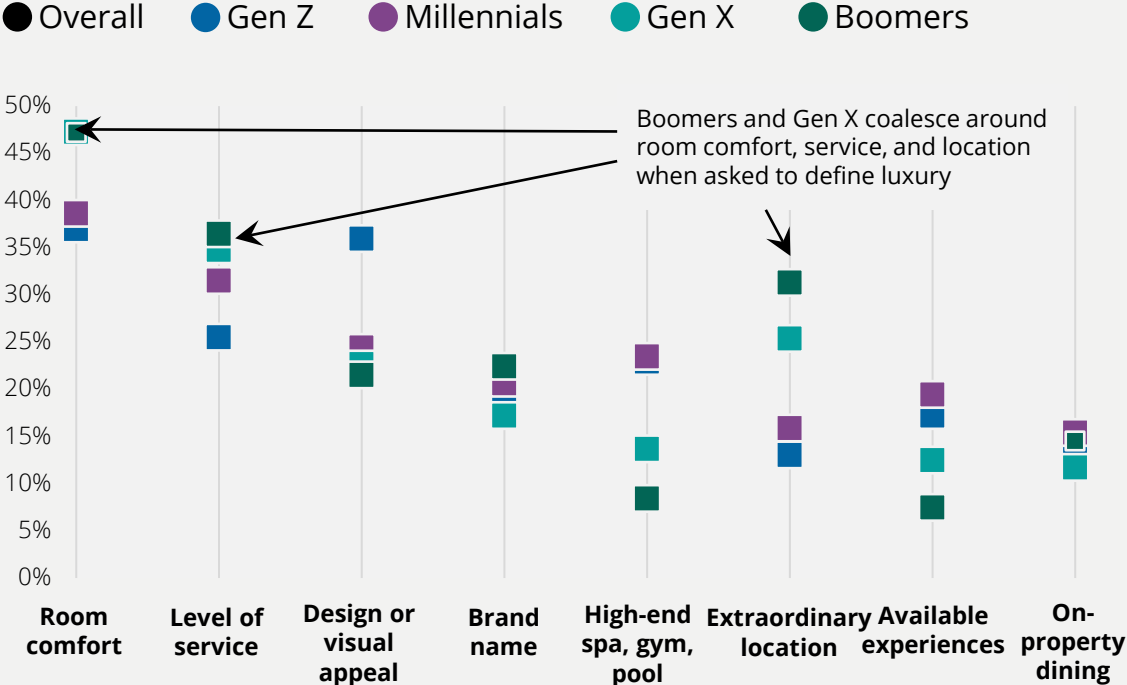
# Millennials and Gen Z respondents lead luxury travel intent, and compared to older travelers, they have more diverse opinions on what constitutes luxury

2026 luxury travel intent, by generation



Notes: Question: "In 2026, on how many personal leisure trips do you plan to stay in a hotel with an average nightly rate of \$400 or more? If you have already stayed in such a hotel for leisure so far in 2026, please count those trips as well" (n = 509 luxury travelers); \*Travelers who have stayed at a property they consider luxurious in the past two years and plan to stay at a property charging at least \$400 per night qualify as luxury travelers.  
Source: 2026 Deloitte Summer Travel Survey.

What makes a property luxurious?



Notes: Question: "Thinking of the most luxurious lodging you have stayed in the past two years, which two attributes of the property did you feel most contributed to its luxuriousness?" (n = 509 luxury travelers); \*Travelers who have stayed at a property they consider luxurious in the past two years and plan to stay at a property charging at least \$400 per night qualify as luxury travelers.  
Source: 2026 Deloitte Summer Travel Survey.

# About 8 in 10 travelers are members of at least one travel provider loyalty program

**78%**

of travelers are members of **at least one travel provider loyalty program**

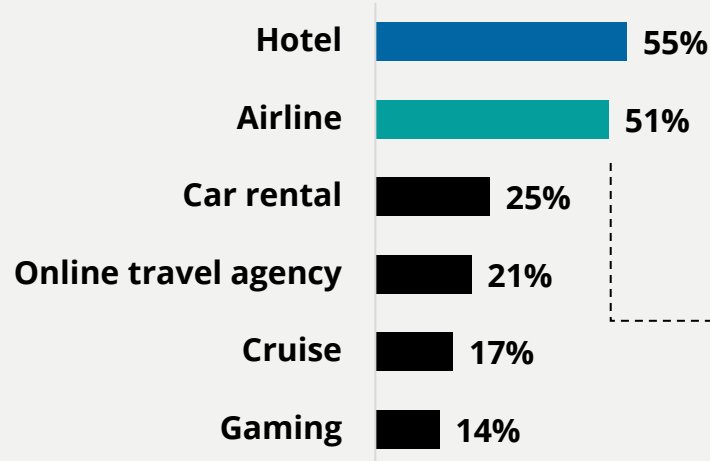
**32%**

of travelers hold **loyalty memberships across three or more product or platform categories**

**22%**

of travelers (and 32% of Gen Z travelers) hold **no loyalty memberships**

## Share enrolled in loyalty programs (at least one program per category)



### Areas where **hotel loyalty members** report value derived from programs (percentage including in top five)

Pricing	50%
Points redemption for stays	50%
Upgraded room experience	44%
Flexibility (early check-in, late checkout)	41%
Priority check-in	38%

### Areas where **airline loyalty members** report value derived from programs (percentage including in top five)

Points redemption for flights	57%
Priority check-in and boarding	48%
Seat selection	40%
Pricing	37%
Onboard experience	34%

## Generational perspectives on the value of loyalty programs

- Gen Z:** Enhanced on-property experience
- Millennials:** Functional ease through check-in, check-out flexibility, and faster issue resolution
- Gen X:** Points redemption and rates
- Boomers:** Points redemption and rates

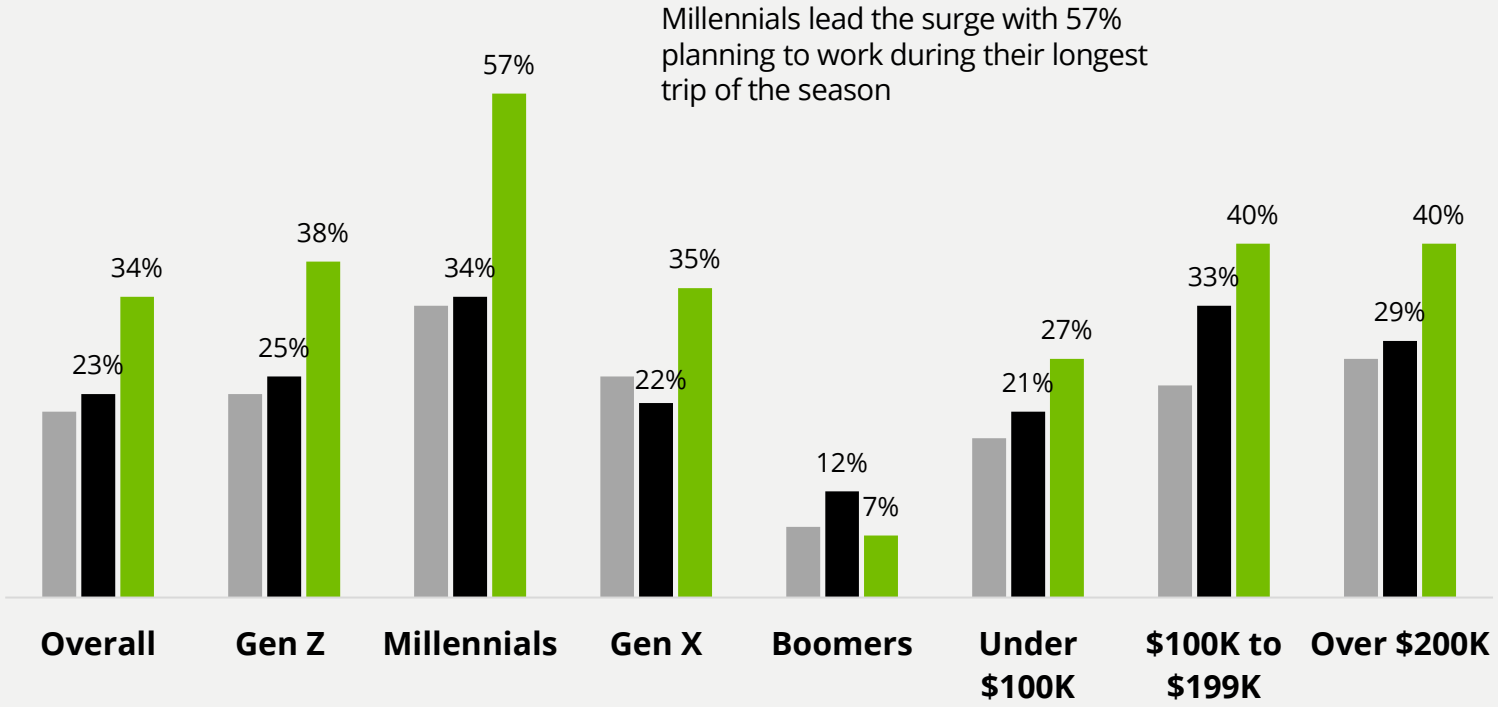
- Gen Z:** Better pricing/deals and smoother airport experience
- Millennials:** Smoother airport experience and in-flight comfort
- Gen X:** Points redemption
- Boomers:** Points redemption

Notes: Questions: (1) "Do you belong to any travel loyalty programs?" (Select all that apply) (n = 1,808); (2) "In which parts of your air travel experience do you feel your loyalty status provides meaningful value?" (n = 926 air loyalty members); (3) "In which parts of your hotel travel experience do you feel your loyalty status provides meaningful value?" (n = 997 hotel loyalty members).  
Source: 2026 Deloitte Summer Travel Survey.

# Laptop lugging gets a second wind as 34% of travelers plan to work on their longest summer trip, up 11 points from 2025

Travelers planning to work during longest summer trip, 2024 to 2026

● 2024 ● 2025 ● 2026



Remote working enables more and longer travel

	Laptop luggers	Disconnectors
Average 2026 summer trips	3.6 trips	3.0 trips
Remote working extends <i>summer seasonal travel</i>	6 days	3 days
Remote working extends <i>summer marquee trip</i>	3 days	--

Notes: Questions: (1) "Do you plan to work during this trip?"; (2) "How many leisure trips will you be taking this summer season?"; (3) "How many days are you adding to the season and this trip because of the ability to work remotely?"; (4) "How has remote work affected your travel habits?" (Select all that apply); n = 620 laptop luggers; n = 631 disconnectors. Source: 2026 Deloitte Summer Travel Survey.

**Over 80% of Gen Z and millennial laptop luggers say that remote working has affected their general travel habits. Gen X travel habits have not changed as much.**

**Remote work’s influence on laptop luggers’ travel habits**

	Gen Z	Millennials	Gen X
<b>Remote working has impacted travel habits</b>	<b>83%</b>	<b>82%</b>	<b>57%</b>
<b>How?</b>			
Longer trips	23%	33%	20%
Travel outside the peak season	22%	21%	25%
Spontaneous trips	27%	25%	18%
Frequent short trips in the year	15%	24%	21%
Stay at private rentals	23%	19%	14%
More in-destination activities	21%	21%	10%
More international trips	13%	20%	11%
Multi-destination trips	13%	16%	12%
Travel to farther-away international destinations	15%	15%	10%

Notes: Question: “How has remote work affected your travel habits?” (Select all that apply) (n = 620 laptop luggers); Boomers are excluded from this slide because of their low propensity to mix work and travel (see prior slide). Source: 2026 Deloitte Summer Travel Survey.

# Authors



**Kate Ferrara**  
Vice chair and US transportation,  
hospitality, and services sector leader  
Deloitte Consulting LLP  
[kferrara@deloitte.com](mailto:kferrara@deloitte.com)



**Eileen Crowley**  
US transportation, hospitality,  
and services partner  
Deloitte & Touche LLP  
[ecrowley@deloitte.com](mailto:ecrowley@deloitte.com)



**Matt Josephson**  
Principal and US hospitality leader  
Deloitte Consulting LLP  
[mjosephson@deloitte.com](mailto:mjosephson@deloitte.com)



**Matt Soderberg**  
Principal and US airlines leader  
Deloitte Consulting LLP  
[msoderberg@deloitte.com](mailto:msoderberg@deloitte.com)



**Maggie Rauch**  
Transportation, hospitality,  
and services research leader  
Deloitte Services LP  
[magrauch@deloitte.com](mailto:magrauch@deloitte.com)



**Upasana Naik**  
Transportation, hospitality, and services  
Assistant research manager  
Deloitte Support Services India Pvt. Ltd.  
[upnaik@deloitte.com](mailto:upnaik@deloitte.com)

## Thank you

The authors would like to thank **Sanjay Vadrevu** for his contribution to this survey.

**Deloitte Consumer Industry Center**

The Deloitte Consumer Industry Center provides premiere insights based on primary research on the most prevalent issues facing the consumer industry to help our clients run effectively and achieve superior business results. The center is your trusted source for information on leading trends and research that connect insights, issues, and solutions for Deloitte's four consumer sectors: automotive; consumer products; retail, wholesale, and distribution; and transportation, hospitality, and services.

**About Deloitte**

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee ("DTTL"), its network of member firms, and their related entities. DTTL and each of its member firms are legally separate and independent entities. DTTL (also referred to as "Deloitte Global") does not provide services to clients. In the United States, Deloitte refers to one or more of the US member firms of DTTL, their related entities that operate using the "Deloitte" name in the United States, and their respective affiliates. Certain services may not be available to attest clients under the rules and regulations of public accounting. Please see [www.deloitte.com/about](http://www.deloitte.com/about) to learn more about our global network of member firms.

This presentation contains general information only and Deloitte is not, by means of this presentation, rendering accounting, business, financial, investment, legal, tax, or other professional advice or services. This presentation is not a substitute for such professional advice or services, nor should it be used as a basis for any decision or action that may affect your business. Before making any decision or taking any action that may affect your business, you should consult a qualified professional adviser.

Deloitte shall not be responsible for any loss sustained by any person who relies on this presentation.

Copyright © 2026 Deloitte Development LLC. All rights reserved.