

Getting Back to Getaways

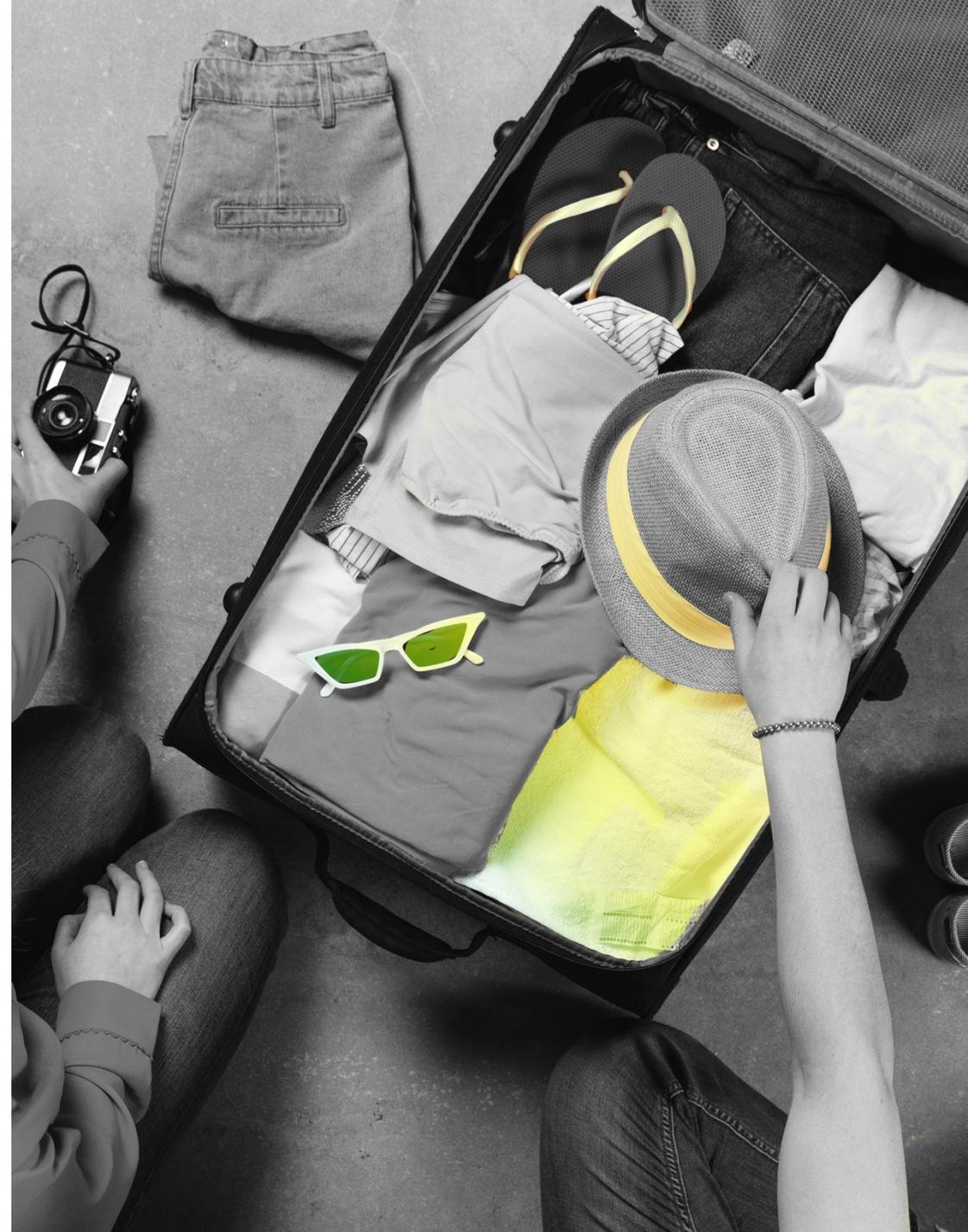
2022 Deloitte Summer travel survey

May 2022



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Letter from the practice

As Americans have adjusted their lives to mitigate transmission of COVID-19, travel has been among the most affected consumer activities. Deloitte has documented that effect, tracking global travel demand closely since early 2020. Our Global State of the Consumer Tracker has shown travel lagging other consumer activities in both purchase intent and safety perception since the pandemic began.

Significant relief came in 2021. The vaccine rollout that began early that year enabled leisure travel to begin its comeback in time for the busy summer travel season. Unfortunately, delta, omicron, and the continued succession of variants slowed that comeback. But traveler confidence seems to be finding its footing again. Going into the 2022 summer season, Americans' safety perceptions related to travel and social activities are at their highest point since the pandemic began. Nearly half (46%) of Americans plan to take leisure vacations this summer, up from 41% in 2021.

Health considerations remain a part of everyday life and factor into travel decisions. But compared to 2021, travelers are significantly less likely to stay home to avoid COVID-19 transmission. Their selection process—for flights, lodging, and other travel products—is significantly less colored by health concerns. At the same time, concerns about personal finances and higher travel prices are prominent. Despite these anxieties, Americans are opening their wallets and intend to spend more on travel than they did in 2021.

While society works out which pandemic-driven lifestyle changes will persist going forward, one such change appears to point to a sizable opportunity for travel providers. Workplace flexibility enables some to travel differently, fulfilling work obligations on the margins of their vacations. This is leading many to take more and longer trips this summer. And distinct preferences are emerging among these so-called laptop luggers.

Travel's comeback continues to grow, and Deloitte is pleased to once again provide insights into the trends and preferences that will play out across millions of journeys this summer.

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Methodology note

A representative sample of 4,233 Americans took this survey between March 23 and March 30, 2022. Of those, 2,536 qualified as travelers. A smaller subset of 1,960 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 or marquee summer trips. Because most travelers will take multiple trips across the season, including a mix of family visits and adventures in new destinations, it is useful to delve into the longest trip. Travel behaviors across the season, combined with patterns and preferences for the longest trip, provide a more comprehensive view of travel decisions and purchase trends.

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Key findings

- **Intent to travel is high.** Six in 10 Americans plan to travel this summer, with 46% staying in paid lodging (vs. with friends and relatives)—a significant jump from 41% in 2021.
- **COVID-related concerns have declined significantly since 2021.** Pandemic-driven factors such as the ability to avoid crowds remain important in destination and lodging selection. And COVID-19 is still a leading reason why some are staying home, but health worries play a smaller role across trip-related decisions.
- **Americans are wary of high airfares and room rates, but many will open their wallets for their marquee summer trip.** Overall spend will likely increase over 2021, and 28% say they will spend more than they did in 2019.
- **International surge isn't here yet.** Although international travel has gotten significantly more convenient over the past year, Americans are not rushing to the borders just yet. About one in eight Americans plan to go abroad this summer, similar to 2021. With COVID testing still required to reenter the United States, and countries' requirements subject to change, some are likely waiting for more predictability before booking international trips.
- **Road trips are down and will be shorter than last summer.** More than half of travelers plan to take road trips this summer, but fewer plan to hit the road for their longest trip, compared to 2021. Saving money is a likely motivation. Compared to flyers, drivers are much more likely to be cutting budgets and to be traveling in groups.
- **Younger travelers still lead the way, but Americans age 55 and older will venture out in bigger numbers.** Still, younger travelers have more robust plans. They are more likely to stay in a variety of lodging types across a single trip and to participate in in-destination activities.
- **Private rental adoption continues to grow.** Among the 20% of travelers planning to stay in private rentals this summer, one in seven will be using this lodging type for the first time. One-third began staying in rentals during the pandemic. And seven in 10 new rental travelers say they expect to continue staying in rentals postpandemic.
- **Laptop luggers, a growing and lucrative market, have big plans and distinct preferences.** One in five American travelers plan to fit some work in during their longest summer trip. This group plans to take more trips and spend more. They also exhibit distinctive preferences across all kinds of travel decisions.

A black and white photograph of a woman walking away from the camera on a moving walkway in an airport. She is wearing a white short-sleeved shirt, blue jeans, and a wide-brimmed straw hat with a bright pink band. Her right hand is on the hat, and her left hand is on the handle of a pink suitcase. The walkway is flanked by glass railings, and other people are visible in the background. The text "2022 Summer travel outlook" is overlaid in white in the center of the image.

2022 Summer travel outlook

2022 Summer travel outlook

Americans open their wallets to travel this summer, as health-related travel concerns decline

Summer 2022 is expected to be a busy season for leisure travel, with Americans traveling at a rate similar to, and perhaps even slightly above, prepandemic numbers. Most (83%) plan to stay in hotels, rentals, or other paid lodging. About half plan to fly. For many of those not traveling, health concerns remain a barrier, but a greater share cite finances as their reason for staying home.

Americans say they plan to increase the budgets for their marquee summer trips compared to 2021, despite taking shorter trips and staying in similar accommodations. The higher spend seems largely attributable to higher airfares and hotel rates.

About two-thirds of travelers are planning their *longest* trips for June and July, but roads and skies should be busy all summer long—45% of *all* trips are slated for August or September. And as Americans decide where to go, COVID-specific concerns, such as CDC guidelines and social distancing, are less prominent. The destination decision for domestic trips will likely look more similar to prepandemic.

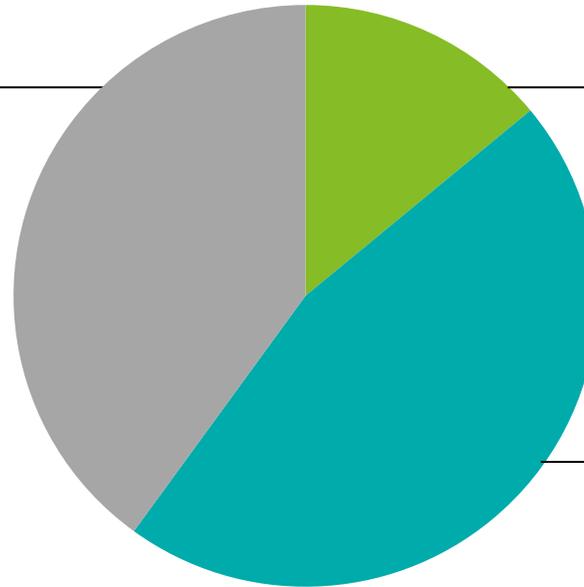
2022 summer travel will likely surpass 2021¹ and prepandemic levels.²
For non-travelers, money is the biggest concern.

2022 summer travel plans

40% Not taking a leisure trip

Top five reasons for not traveling

1. Concerned about finances
2. Concerned about health of self and others
3. Waiting for the pandemic to be over
4. Prefer to spend on something else
5. Enjoying desired destination is difficult due to pandemic restrictions



Taking a leisure trip, staying with friends or family **14%**

*Travelers refrain from staying in paid lodging to be able to **spend on something else** and **to avoid exposure to strangers***

Taking a leisure trip with paid lodging **46%**

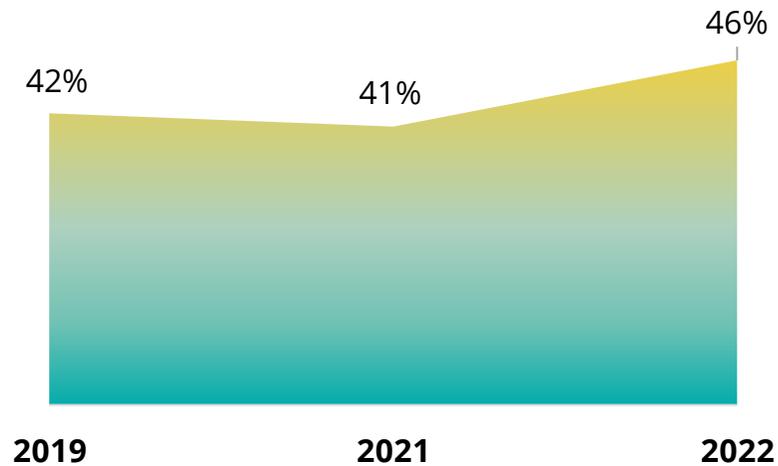
Source: Deloitte 2022 summer travel survey, N=4,233

Questions: What activities are you planning to partake in summer 2022 (between Memorial Day and the end of September)? Why are you unlikely to travel?

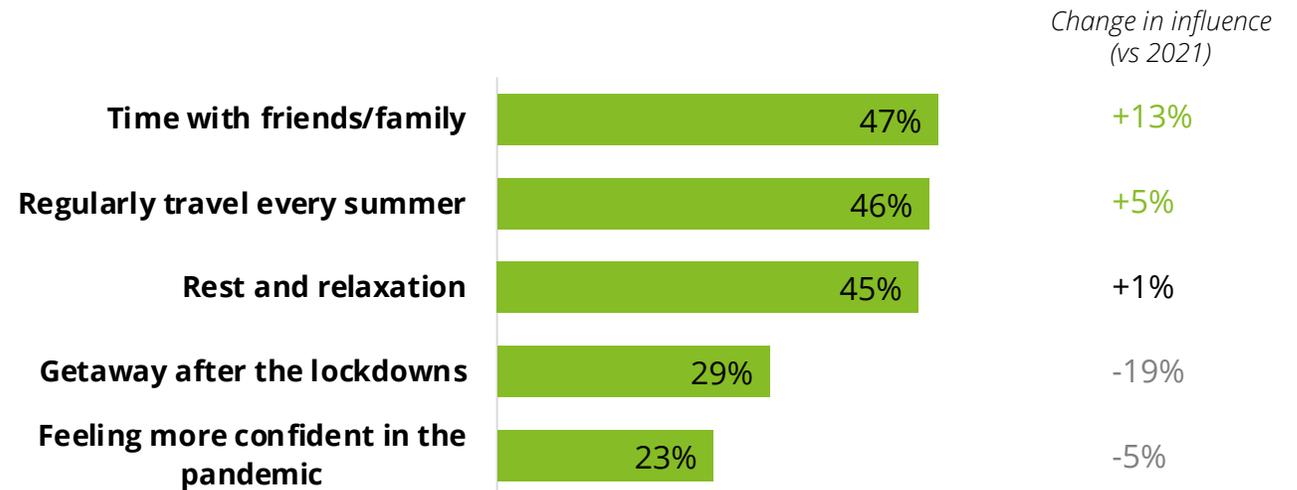
Note: ¹[Deloitte 2021 summer travel survey](#) ²[vci 2019 whitepaper aga.pdf \(allianzworldwidepartners.com\)](#)

Summer traffic is up big over 2021. Time with loved ones and tradition are top motivators, but the post-lockdown getaway drives nearly one in three trips.

Share of Americans traveling in the summer and staying in paid lodging

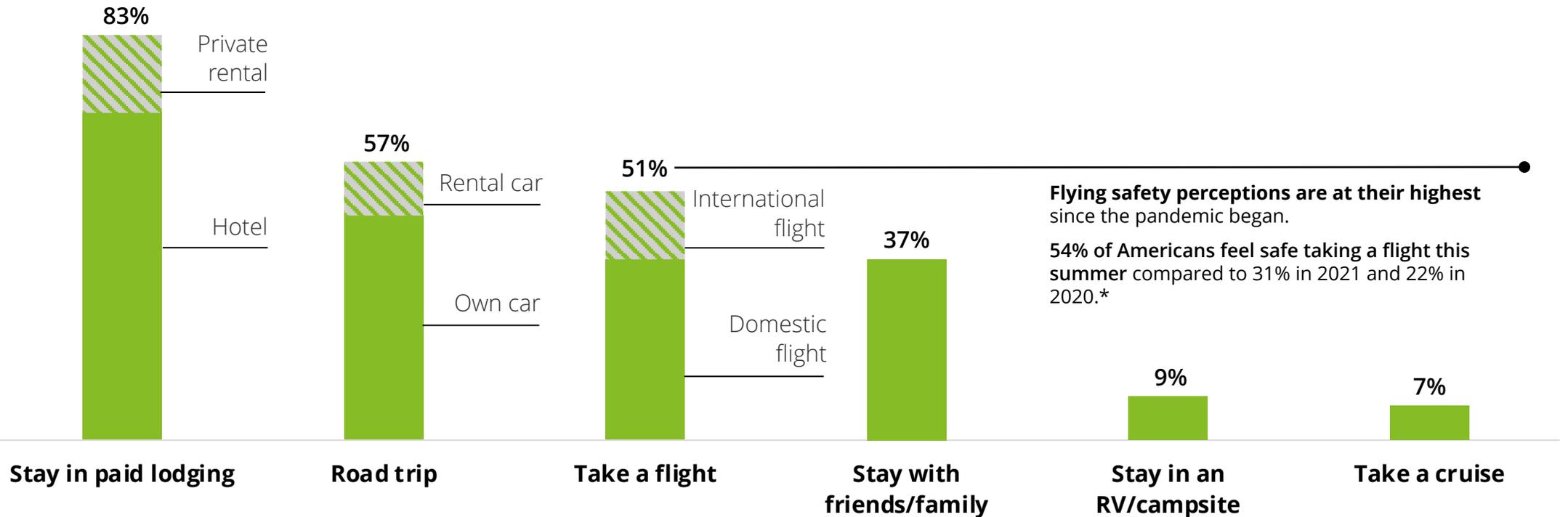


Top travel motivators this summer



Travelers will take an average of two trips this summer, and slightly more plan to take road trips vs. flights.

What travel behavior will you partake in across all your leisure trips this summer?



Flying safety perceptions are at their highest since the pandemic began.

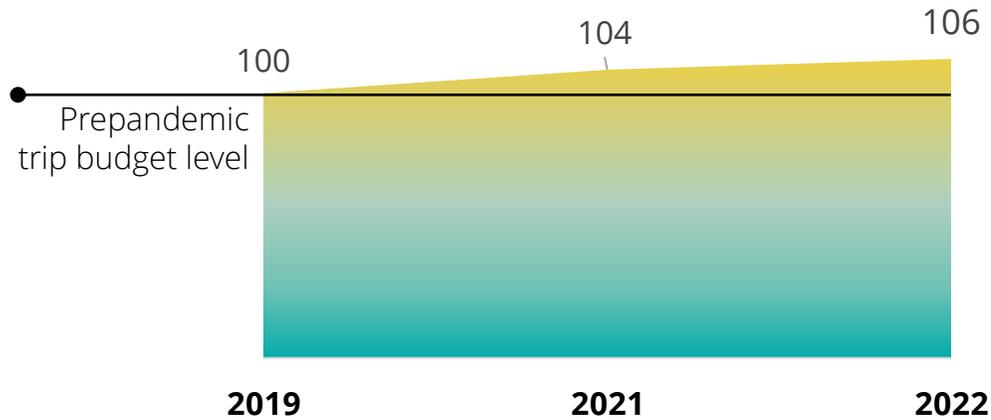
54% of Americans feel safe taking a flight this summer compared to 31% in 2021 and 22% in 2020.*

Source: Deloitte 2022 summer travel survey, N=2,546; *Deloitte Global State of the Consumer Tracker, N=1,000 (every wave)

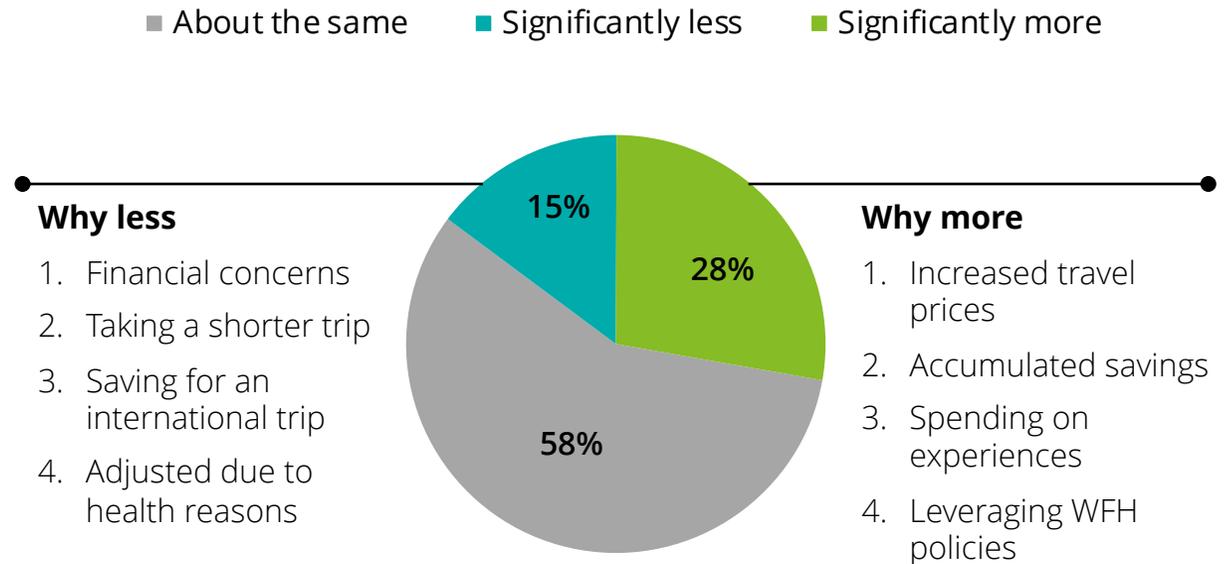
Note: Summer flying safety perceptions correspond to March-end responses in each year.

Budgets for marquee trips exceed prepandemic levels, largely due to higher travel prices and use of accumulated savings. Half of those reducing spend cite financial concerns.

Movement in summer trip budgets
(Indexed to 2019 spend)



How does your 2022 budget compare to your budget in 2019?



Source: Deloitte 2022 summer travel survey, N=1,960

Note: Marquee trip is the longest summer trip including paid lodging; Weighted averages are indexed to 2019 spend to track movement in trip budgets.

COVID-19 concerns lose influence in destination selection.

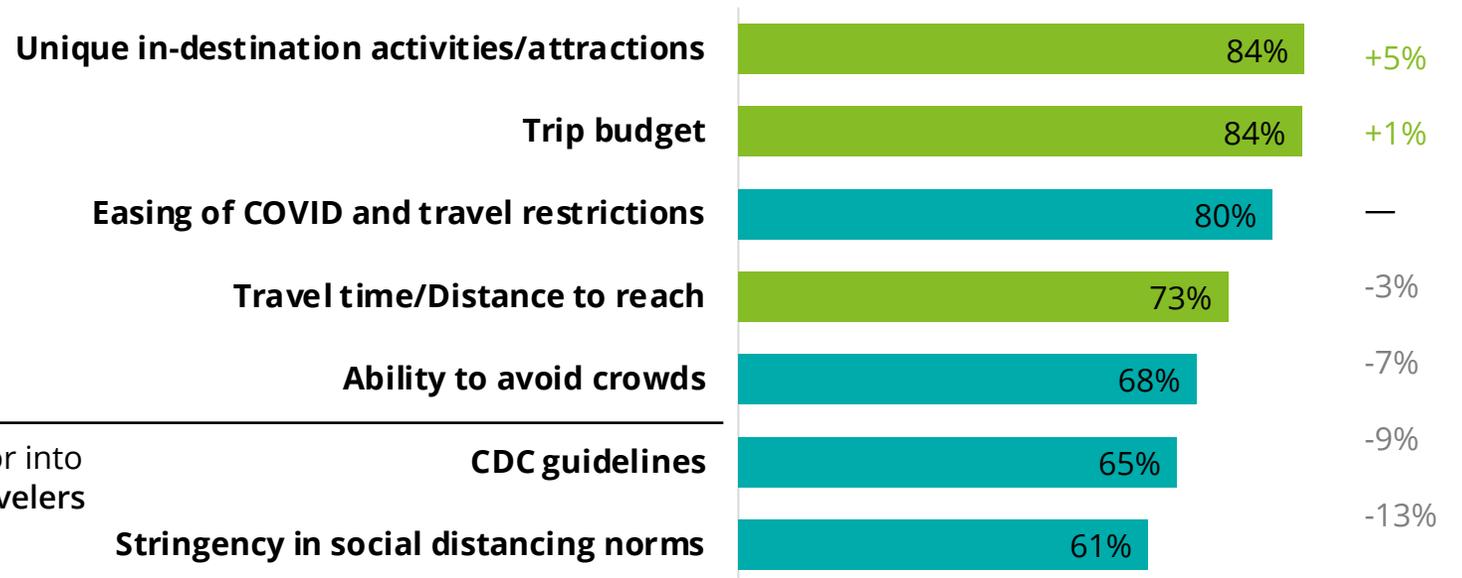
Preferred summer destination types remain similar to 2021

Beaches	32%
Cities	29%
Great outdoors	16%
National or state parks	8%
Theme parks	8%

● Geopolitical developments factor into destination choice for 6 in 10 travelers

Top destination decision factors

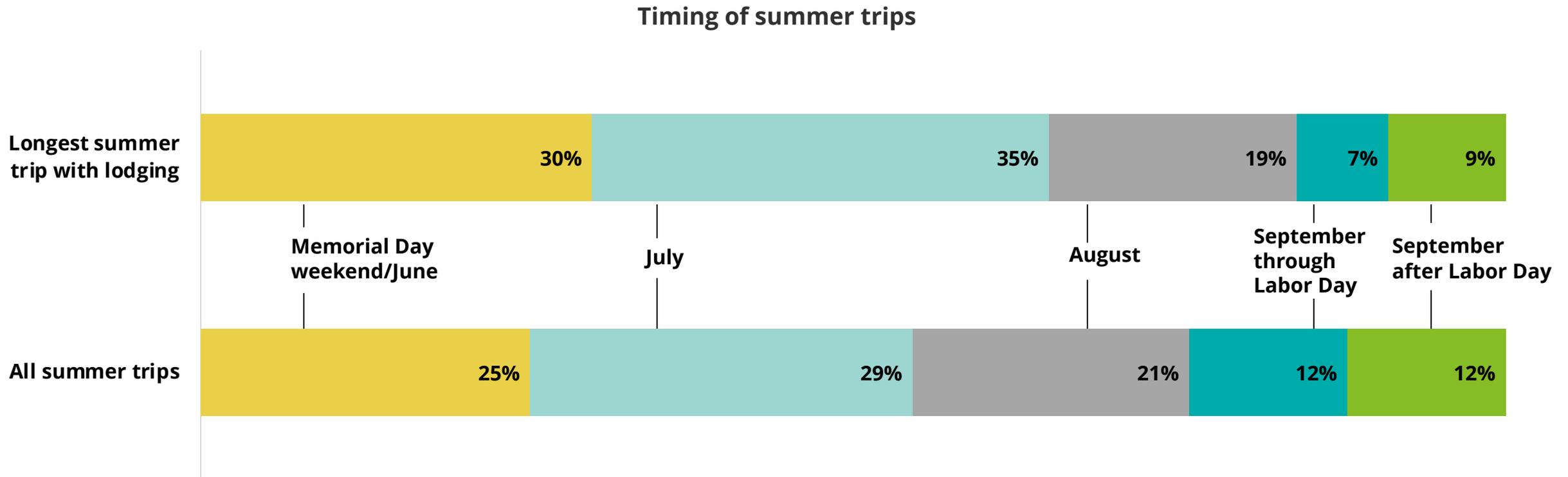
Consideration themes: ■ Trip characteristics ■ COVID-specific concerns



Source: Deloitte 2022 summer travel survey, N=1,960

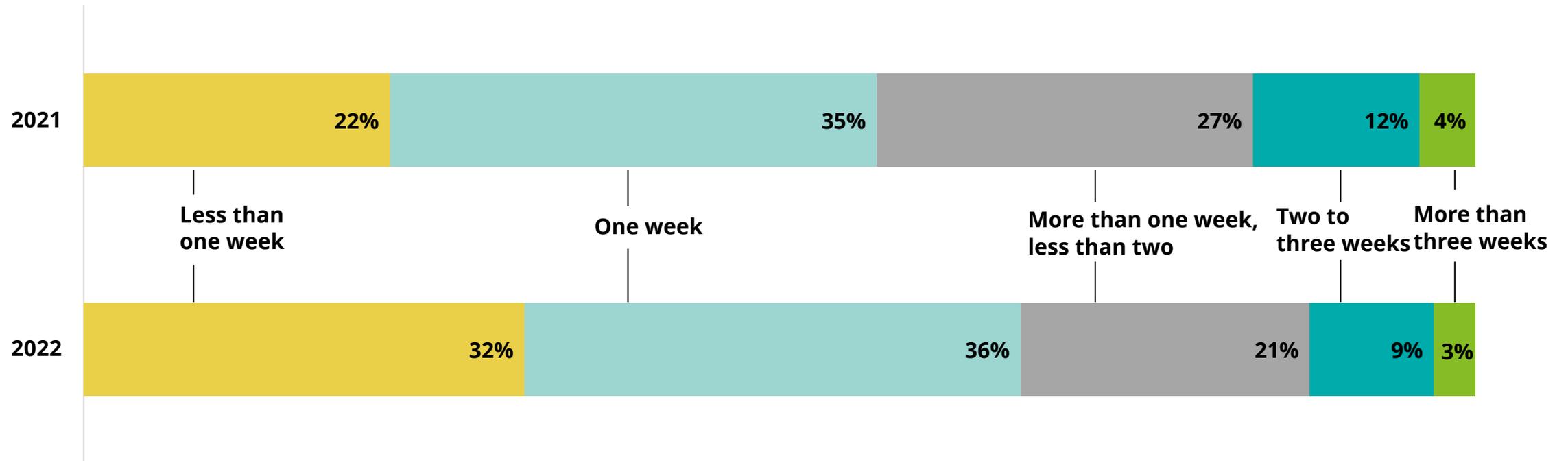
Note: Great outdoors includes the countryside, mountains, lakes, etc.

Americans plan to travel throughout the summer, but the longest trips will take place earlier in the season.



Traffic increases, but trip durations shrink compared to 2021.
Longest trip for 32% will last shorter than a week, up from 22%.

Duration of longest summer trip





Travel products —
Transportation, lodging, and activities

Roads and skies, keys and tickets

Travelers plan to enjoy a variety of activities and lodging types, and comfort with flying has improved

There are no losers in this summer's leisure travel market, as travelers intend to flock to beaches and cities, spreading their spend across airlines, hotels, private rentals, local attractions, and cruises. Much of that spend will accrue to domestic destinations. While international travel is more convenient than in 2021, travelers are not rushing to the borders just yet. Among those flying, 27% plan to go overseas.

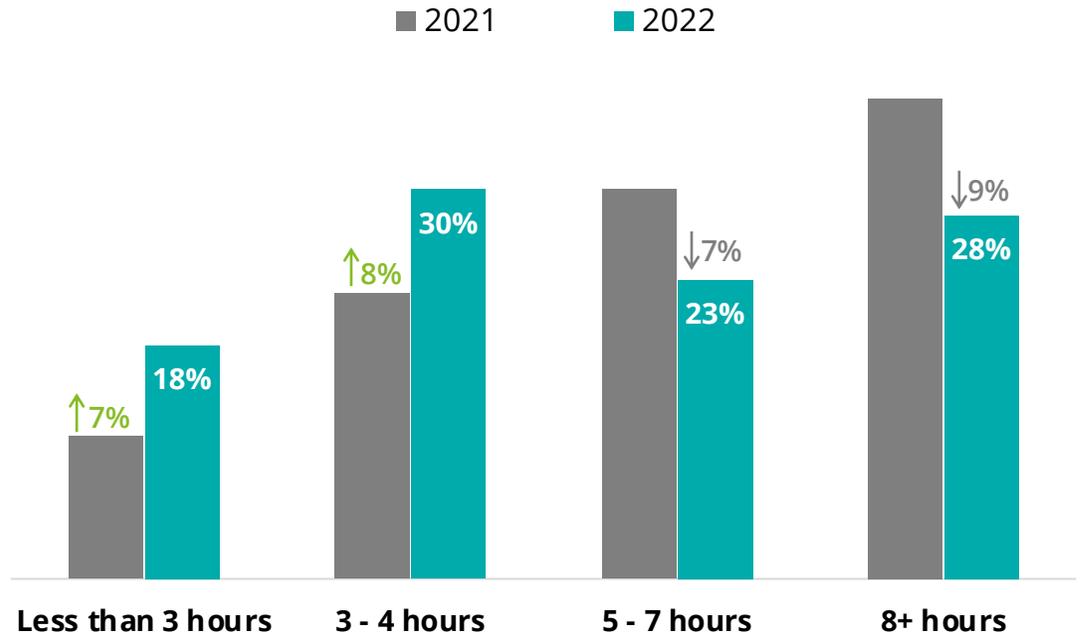
To drive or to fly? Americans' perceptions of the safety of flying have improved dramatically. Over half (54%) feel safe flying, compared to less than a third in 2021. This summer, fewer plan road trips, and those who do seem to have financial, not health, reasons. Compared to flyers, drivers are more likely to be cutting their travel budgets and more likely to travel in groups, thereby dividing costs.

Most travelers (80%) will stay in hotels on their longest trip of the season, and rentals can expect another strong summer, with one-fifth renting private accommodations. After two years of more liberal cancellation policies, flexibility is among the top criteria for both hotel and airline selection. And when it comes to lodging selection, the ability to work remotely saw a huge surge in influence over the past year as travelers squeeze extra days in destination out of their flexible work arrangements.

Fewer travelers hit the road this summer as comfort with flying increases. Compared to 2021, fewer will drive five hours or longer.

62% will drive as at least one of the modes of transport for their trip, compared to 76% of travelers driving in 2021

Road travelers are driving shorter distances this year

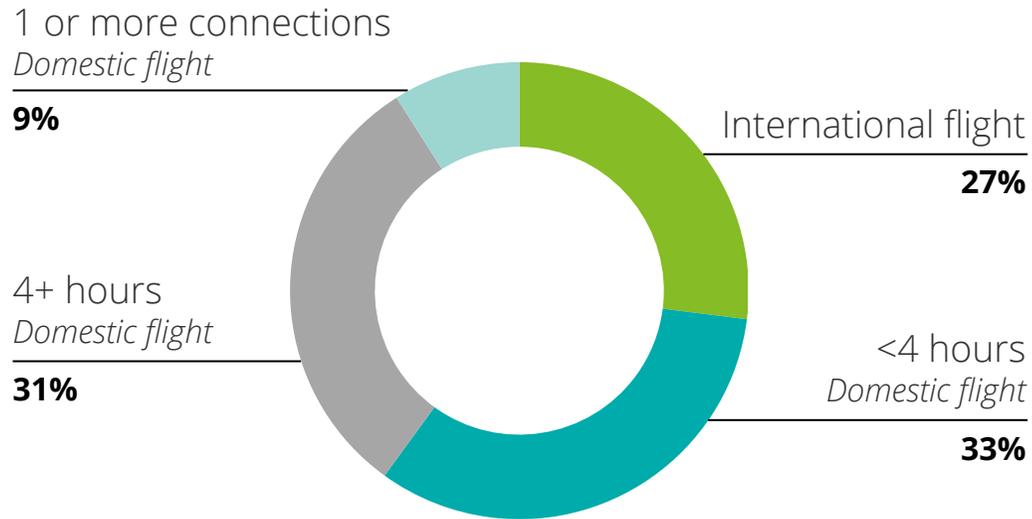


8 in 10 are taking shorter trips
 Half of marquee summer trips that travelers drive to will last less than a week (vs. 35% in 2021), and a third will last a week (vs. 38% in 2021)

Percentage of US travelers driving rental cars to drop by half		Change in usage (vs 2021)
Driving own car	53%	-4%
Driving a rental car	9%	-10%

Nearly half of travelers will fly this summer; most say they will shell out for upgrades.

47% of travelers will be taking a flight for their **marquee trip this summer**



The proportion planning international trips is similar to 2021. Some are likely waiting for less stringent, and more consistent, border policies.

Flyers place high value on comfort this summer

For my longest summer trip, I purchased...



Source: Deloitte 2022 summer travel survey, N=917

Question: Which best describes the airfare that you booked? N=447 travelers who have booked their flights

Note: Marquee trip is the longest trip this summer involving paid lodging.

As people venture out, most welcome health screening and masking.

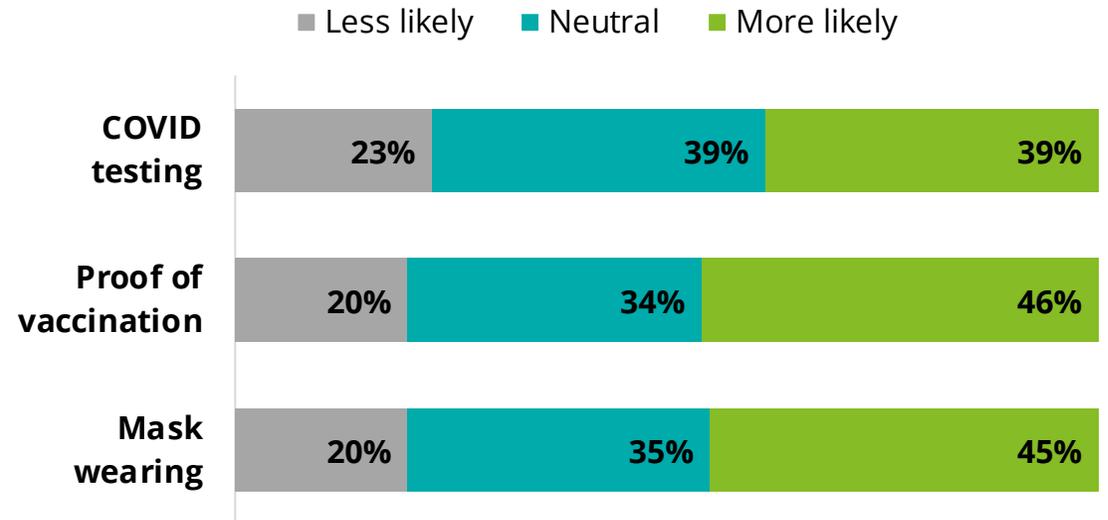
Travelers like the flexibility they enjoyed with air bookings during the pandemic, ranking it as their top reason to choose a specific carrier.

Nine in 10 flyers list these factors as important when choosing their airline:

- 1 Flexibility (cancelations, rescheduling)
- 2 Better deals and discounts
- 3 Direct flights to destination
- 4 Trust in airline

While US airlines no longer require masks onboard, 80% of travelers welcome masking and nearly half would prefer it.

Health requirements' effect on likelihood to book a flight

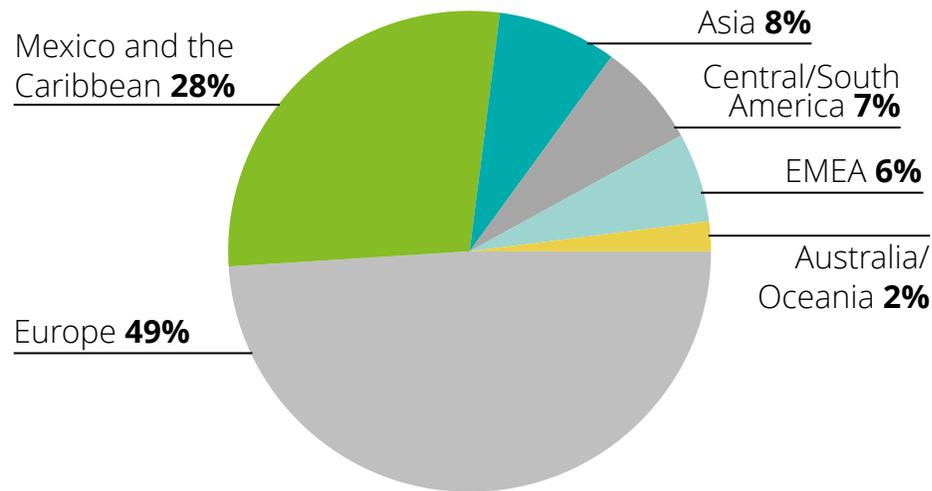


To drive or to fly? Flyers are spending more, taking longer trips. For drivers, budget appears to be a big factor.

Flyers	Drivers
Travel party	
Flyers are more likely to be traveling solo or in smaller groups .	Drivers are more likely to travel in larger groups . Their groups are also more likely to include family and children .
Travel duration	
More than four in 10 flyers will take a trip lasting more than a week. The trip length gap between flyers and drivers has widened compared to summer 2021.	Drivers are 2X as likely to take trips shorter than a week compared to flyers; 25% plan to take a trip longer than a week.
Travel spend	
Flyers have higher budgets than drivers, and one-third are likely to increase them vis-à-vis prepandemic . The gap has also widened since 2021. Flyers are 2X as likely to have a lodging and transport budget of \$3K or more.	Drivers have smaller budgets with just 25% increasing spend compared to prepandemic . Two-thirds have a lodging and transport budget of less than \$3K.

A quarter of flyers head to international locations—Europe is the top destination by a wide margin, followed by Mexico and the Caribbean.

International destination breakdown:



27% of air travelers will fly to **international destinations**

International travelers have several distinctive characteristics compared to domestic travelers:

Informed travelers

Top destination influencers: Geopolitical conditions (+18% vs. domestic), quarantine requirements (+17%), social distancing norms (+16%)

Early birds

Half have completed all their bookings compared to one-third of domestic travelers

Luxury seekers

1.5x as likely to increase their trip budgets vs. prepandemic, 3x as likely to purchase first or business class flight tickets, and more likely to stay at hotels for the luxury (+9%) than domestic travelers

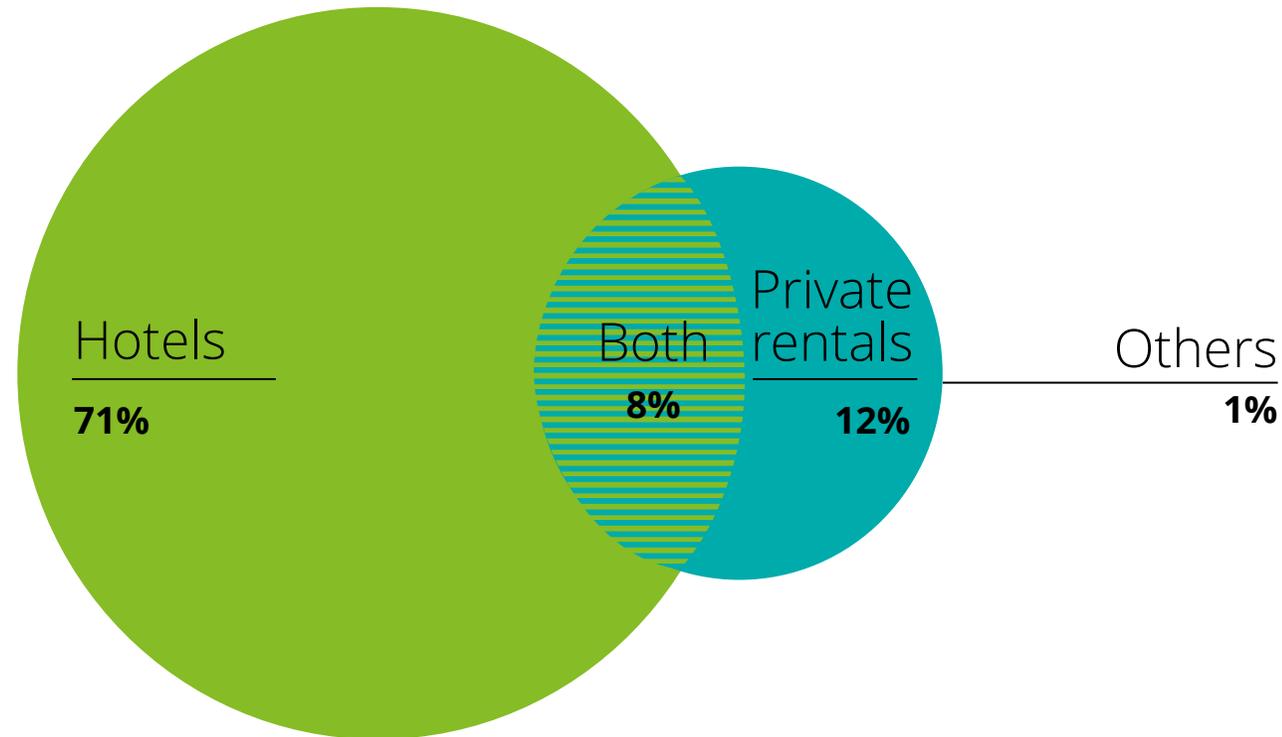
Remote workers

One-third will work on this trip (+9%), and half of them are extending their trip by 3–6 days due to flexible work arrangements

Six in 10 international travelers age 55 and older plan to visit Europe vs. four in 10 younger travelers.

While hotels remain the more popular lodging type, rental demand is strong. Mixing lodging types within a trip is less common than in 2021.

Summer 2022: Paid accommodation split



Source: Deloitte 2022 summer travel survey, N=1,960

Question: Which type of lodging are you planning to stay at or considering for your longest trip of the summer? (Select all that apply)

Note: Marquee trip is the longest trip this summer involving paid lodging; Hotels include full-service hotels, limited-service hotels, and resorts; Others include guesthouses, bed & breakfasts, camps, recreational vehicles.

Remote working environment has surged as a factor in lodging choice. This trend could favor rentals, but many find hotels get the job done.

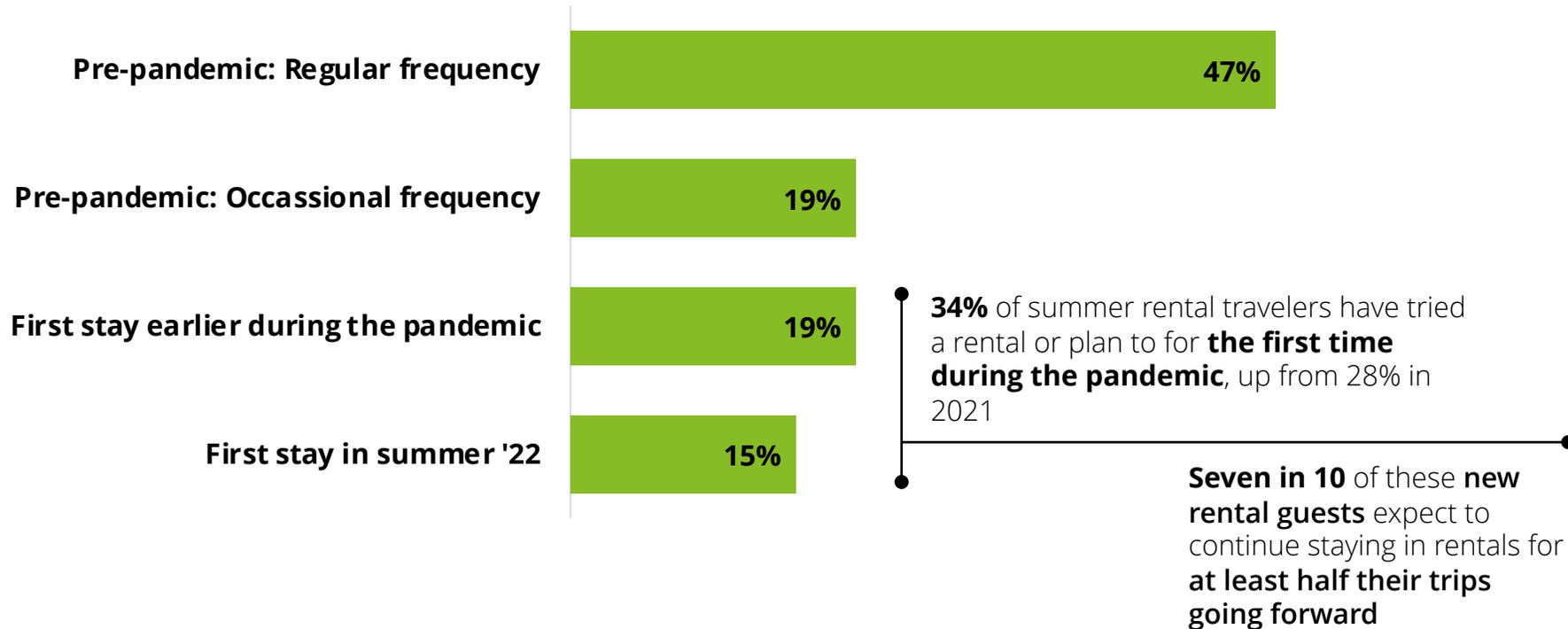
Lodging selection motivators

	Hotels	Change in influence (vs 2021)	Private rentals	Change in influence (vs 2021)	
<p>79% of lodging customers will stay at hotels</p>	Big movers		Big movers		<p>20% of lodging customers will stay at private rentals</p>
	Remote working experience	+12%	Space to work	+19%	
	Shorter trip duration	+8%	Brand messaging	+9%	
	Brand messaging	+6%	Longer trip duration	+8%	
<p>The key motivators remain similar to summer 2021</p>	Top 5		Less exposure to strangers	-9%	
	Trust in the property/brand	+2%	Control over safety measures	-10%	
	Flexibility options	+2%	Top 5		
	Available amenities	—	Availability in destination	—	
	Better deals and discounts	+1%	Trust in the property/brand	+1%	
	Enhanced safety measures	-6%	Available amenities	+1%	
			Extra space for family/friends	—	
			Flexibility options	—	

Source: Deloitte 2022 summer travel survey, N (hotels)=1,562, N (private rentals)=386
 Question: For this trip, how important are the following factors to your choice of lodging?

Private rental adoption continues to grow, and most first-timers say they are likely to continue staying at them on future trips.

2022 private rental guests by experience with rentals



Source: Deloitte 2022 summer travel survey, N=386

Question: How would you describe your experience of staying in private rentals? What do you expect your leisure lodging choices to look like when on vacation going forward?

Rental guests are more likely to take longer trips, travel with family, drive, and work on their summer trip.

How do rental travelers differ from hotel travelers?

Remote workers

2x **as motivated by the flexibility to work remotely** to take this summer trip, and among those traveling, one-third **will work at least partially** vs. one-fifth of hotel travelers

Family vacationers

Rental travelers are **younger** (70% under age 55) and travel in **larger groups** (+8%) **that include family and children** (+11%)

Rental travelers are **more motivated to spend additional time with family and friends** (+9%)

They prefer destinations like **beaches and the outdoors** (+5%) over cities (-10%), and **participate in adventure/outdoor activities** (+15%)

Road trippers

Three-fourths will **drive to their destination** (+15%), and two-thirds will do so **for 3-7 hours** (+10%)

Of those who do fly, rental travelers are **more likely to spend on flight upgrades or first-class tickets** (+9%)

Longer trips

Less likely to take trips shorter than a week (-6%)

Travelers staying at rentals and resorts share similar needs and considerations compared to other lodging types.

Private rental and resort travelers compared to non-resort hotel guests

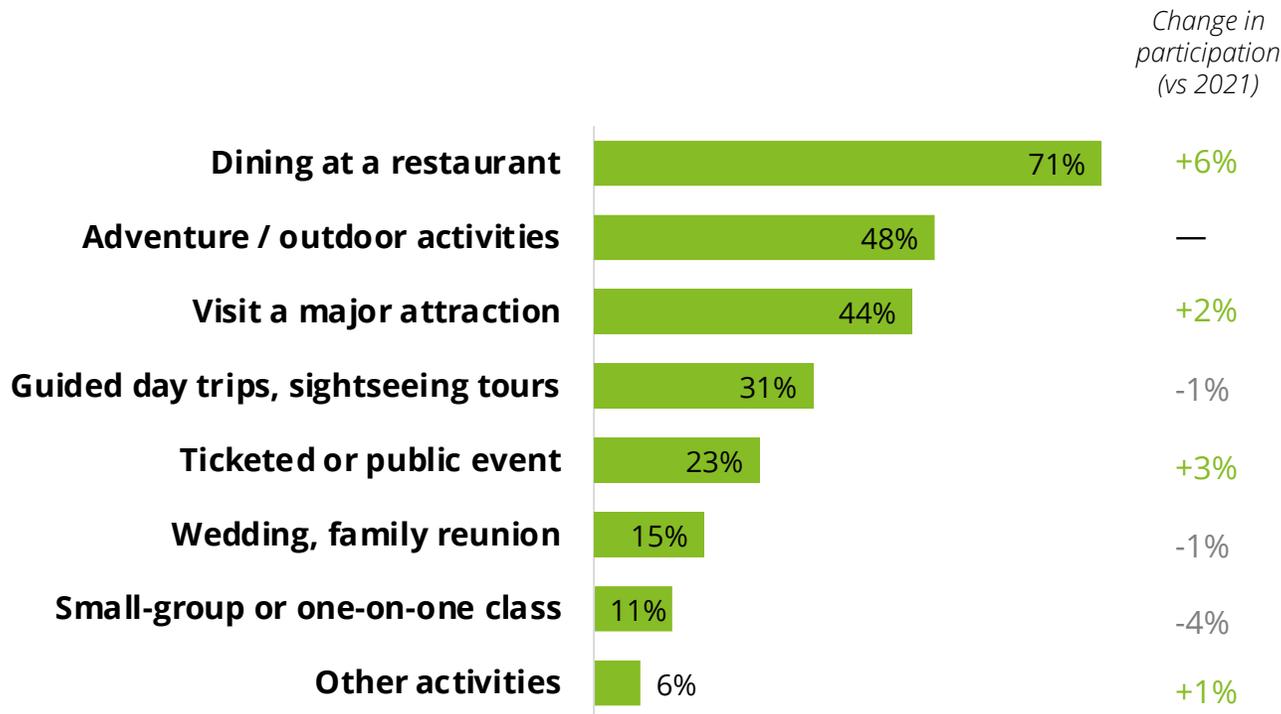
Bigger trips in every way: Rental and resort guests will take **longer trips** than those staying in non-resort hotels. They are traveling in **bigger groups, most with family**. These travelers are also more confident of their finances and more likely to have **higher than prepandemic trip budgets**.

Remote working: One-third of rental and resort guests will **work at least partially** during their summer travels. The ability to work remotely features as an important factor both as a **travel motivator and when picking their destination**.

Activity centered: Rental and resort guests are more likely to head to the beach and to pick their destination based on the **unique attractions and activities** it offers.

Overall activity participation is consistent, but summer travelers are increasing participation in in-destination activities with higher exposure.

Which activities/experiences will you participate in on this trip?



Similar to 2021, 64% of travelers plan to participate in at least one paid travel activity*

Upticks in activities involving exposure to others, combined with more travel overall, portend a **busy summer for in-destination experiences**.

Activity participants tend to be younger, **part of larger groups including family and children**, and are more likely to have higher than prepandemic travel budgets.

Nearly half (45%) of travelers participating in tours or classes plan to **book them as private experiences**. Interest has waned since 2021, but many still prefer a more exclusive experience.

International travelers are more likely to participate in paid travel activities such as tours, attractions, and classes.

The activities sector should keep its eye on **laptop luggers**.** These travelers are more likely to do every kind of travel activity, and **5x as likely to participate in small group or one-on-one classes**.

Source: Deloitte 2022 summer travel survey, N=1,960

*Paid travel activities include attractions; small group/one-on-one classes; guided tours/excursions; ticketed events. Dining is excluded.

**Travelers who plan to work at least partially on their longest trip of the summer.



Health and wealth

Health concerns decrease, money worries rise

Fewer travelers account for COVID-19 in travel decisions, but cost is an increasing concern. COVID-19 remains an important factor in travel decisions, but its influence is fading. From destination selection and lodging choice to in-destination activities and the decision whether to travel at all, Americans still include public health in their calculus. But compared to 2021, participation in social activities is up and COVID-specific motivations are down.

In destination selection, factors like crowd avoidance and CDC guidelines still matter, but fewer travelers take them into account now compared to 2021. And once they arrive, travelers this year are more likely to participate in activities involving sharing space with others, such as dining and visiting attractions.

As concerns about disease decline, financial concerns are rising. Forty-four percent of those not traveling say that money is the reason why, compared to 31% in 2021.

Health concerns remain but wane. Safety protocols lose influence as considerations when making summer travel decisions this year.

Travelers considering health factors

Destination selection		<i>Change in influence (vs 2021)</i>
Crowd avoidance	68%	-7%
CDC guidelines	65%	-9%
Trust/messaging	64%	-4%
Social distancing norms	61%	-13%
Quarantine required	60%	-9%

Lodging selection		<i>Change in influence (vs 2021)</i>
Hotels*	81%	-6%
Private rentals**	75%	-10%



Source: Deloitte 2022 summer travel survey, N=1,960
 *Ensuring enhanced safety measures.
 **Controlled exposure to strangers/higher safety measures.

Summer travelers are more open to relatively public activities and have lower health protocol requirements compared to 2021.

Activity participation levels

=

	<i>Change in participation (vs 2021)</i>
Dining at a restaurant	+6%
Ticketed or public event	+3%
Visit a major attraction	+2%
Small-group or one-on-one classes	-4%
Guided day trips, sightseeing tours	-1%

Health precautions are a lesser consideration when participating in travel activities. Flexibility and private experiences are valued but lower than in 2021.

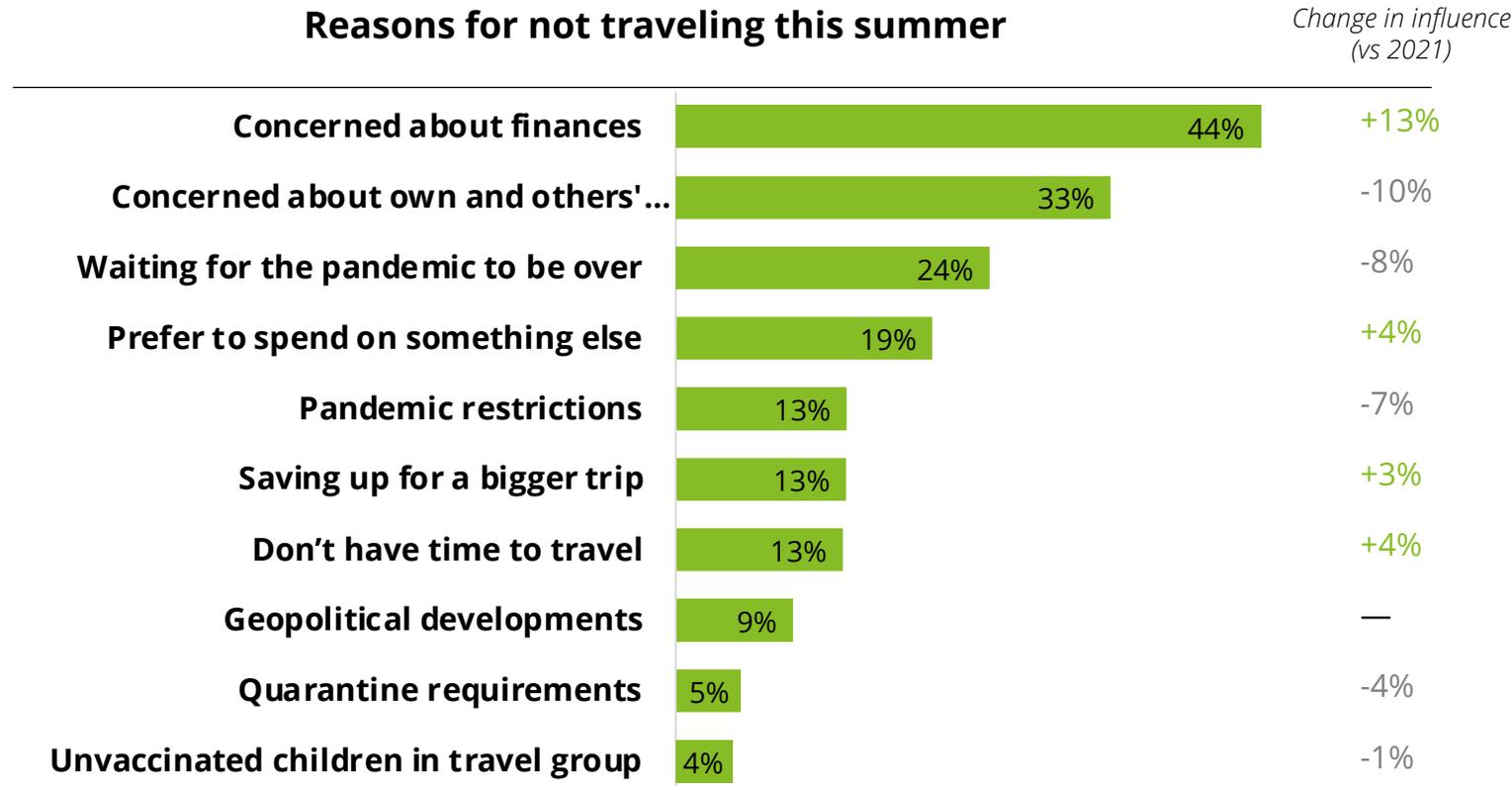
One-third of travelers are willing to **visit attractions with no specific health protocols in place.**

Expectations reduce compared to 2021—social distancing (-15%) and proof of vaccination (-4%).

Travelers value flexibility but require it less than in 2021—being able to cancel on 48-hour notice when booking a guided tour (38%) or an attraction (25%).

Though popular, travelers seek fewer private experiences—45% of participants will only book a tour or class as a private experience (-9%).

Finances replace health as travelers' key concern this summer.



Financial concern is the No. 1 reason why people are not traveling.

Other financial factors have also grown in influence among reasons for not traveling while all **health considerations have dropped in comparison.**

Finances are also the **key driver to reduce trip budgets** among those who are traveling, whereas the pandemic played a larger role in 2021.



Demographic trends

Summer travel trends by age and income

Older age groups return to travel in greater numbers; age and income strong predictors of travel behavior

Americans of all ages and income levels have high intent to travel this summer. Younger travelers have more active plans, and higher-income travelers are more likely to add to their trip budgets, but US destinations can expect to welcome domestic visitors across age and income spectrums.

While travelers age 55 and older are returning to travel in greater numbers, younger travelers have more robust plans. They are more likely to mix lodging types across a single trip and plan to partake in in-destination activities at a higher rate. They also are traveling in bigger groups with more age diversity. Travelers under age 55 represent 77% of those traveling with children.

The more dramatic income bifurcation seen earlier during the pandemic has eased, but buying power still has a big effect on plans. Travelers with household income under \$50,000 are twice as likely to say they have significantly cut their travel budget compared to 2019, compared to those at higher income levels. Not surprisingly, financial concern is the number one reason this group says it has reduced budgets. Meanwhile, when those with higher income cut their budgets, they cite shorter trips and saving up for international trips.

Travelers age 55 and older are returning in greater numbers. Those not traveling cite higher health concerns and differing priorities.

Travel incidence and considerations, by age

Taking at least one trip this summer	18-34	35-54	55+
2022	56%	61%	62%
2021	54%	57%	56%

Younger Americans who **do** travel weigh health concerns in their trip decisions at a higher rate than older American travelers, perhaps due to their longer, more complex trips and likelihood to be traveling with children.

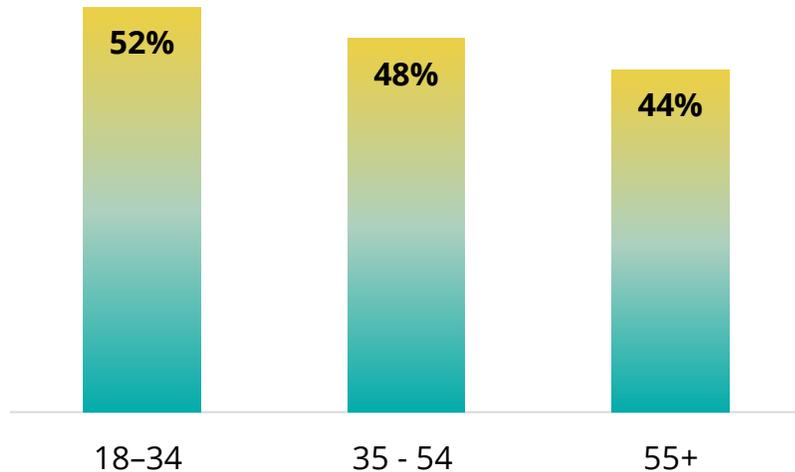
Distinct reasons for not traveling	18-34	35-54	55+
Concerned about own and others' health	28%	34%	35%
Waiting for the pandemic to be over	21%	20%	29%
Prefer to spend on something else	14%	17%	25%
Saving up for a bigger trip	18%	13%	10%
Don't have time to travel	17%	15%	8%

Older non-travelers are more likely to stay home for health reasons...

...despite having the time and money to travel.

Travelers age 35 and older are twice as likely to fly first class, while younger age groups show more interest in upgraded economy fares.

Travelers flying on marquee summer trips, by age

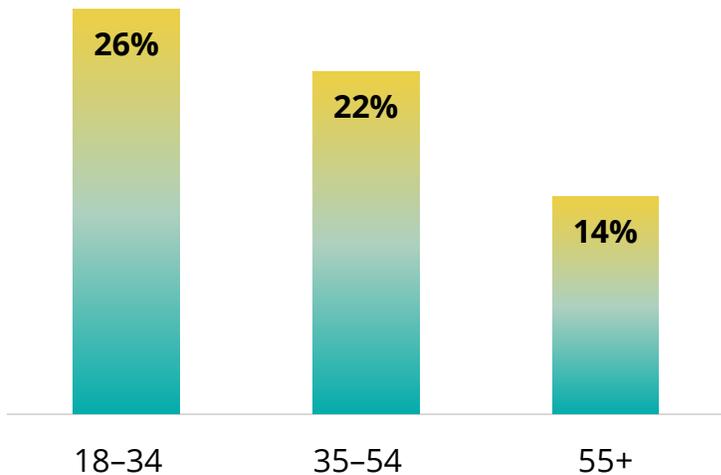


Type of airfare booking, by age

	18-34	35-54	55+
Lowest priced tickets	45%	44%	49%
Tickets with some upgrades	43%	37%	31%
First- or business-class tickets	11%	19%	20%

Private rentals see higher adoption for current and future trips from younger groups.

Staying at a private rental for their summer marquee trip, by age



The acceleration of private rental adoption during the pandemic has been driven mostly by travelers under 55

	18-34	35-54	55+
First stay earlier during pandemic	20%	17%	7%
First stay on upcoming summer trip	23%	14%	7%
Use rentals for 50% or more of future trips	48%	42%	32%

As hotels cut some services due to staffing challenges, younger travelers are more likely to ensure the availability of desired amenities before booking their lodging.

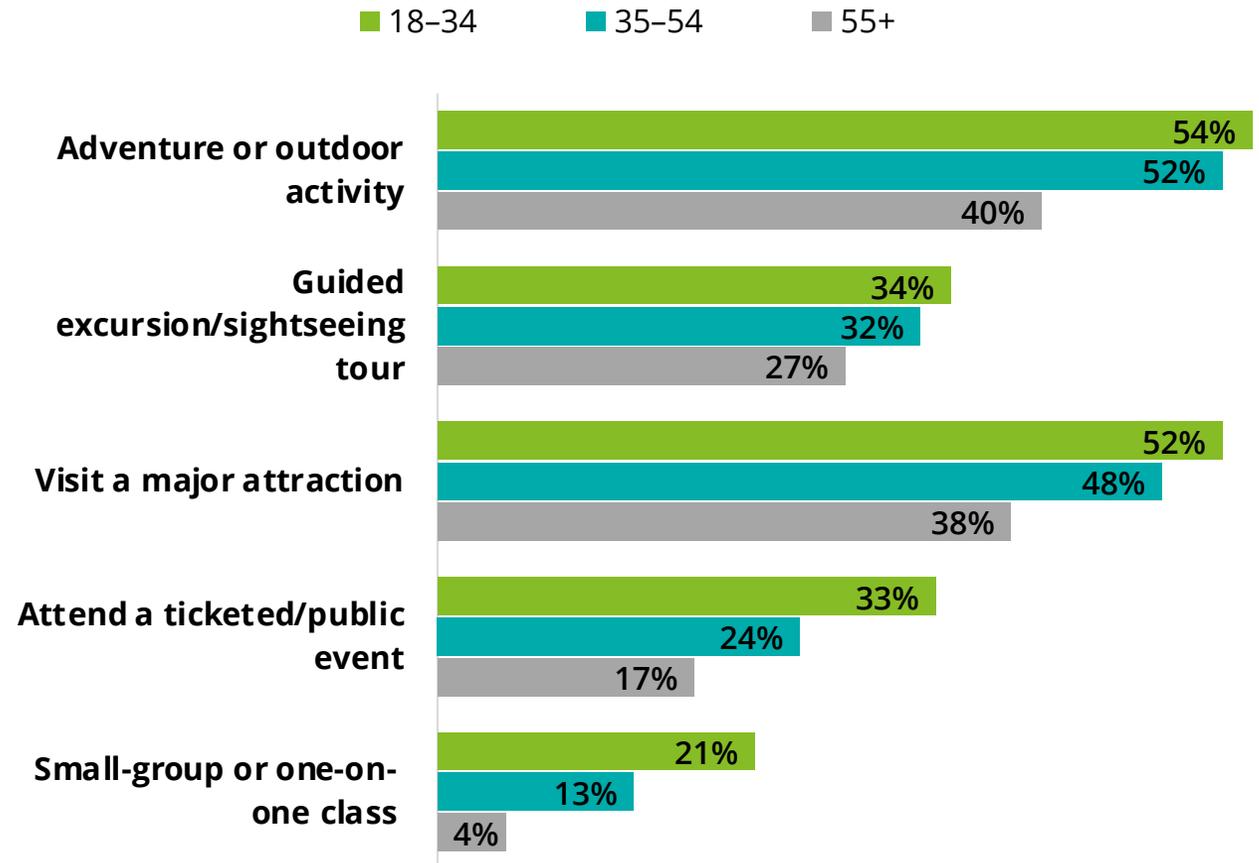
Younger travelers are more likely to participate in all kinds of activities, and to consider them in destination selection

Travelers under age 55 are more likely to head to beaches and theme parks, while older travelers favor cities and scenic destinations.

Younger travelers are also a lot more likely to **factor in unique attractions and activities when picking their destination.**

	Age		
	18-34	35-54	55+
	91%	87%	78%

In-destination activity participation, by age



Family trips with children are going to be more centered around summer activities.

Travel composition

Travel party

Americans traveling with children are **younger** (77% are under age 55) and more likely to travel in **larger numbers** (6 people or more). Four in 10 have **household income of \$100K or higher**.

Lodging and transport

Families with kids are **2X as likely to stay at private rentals** as others. They also place more **emphasis on spacious accommodations and safety** measures in place when picking lodging.

They are nearly two times as **likely to drive vs. fly** to their destination.

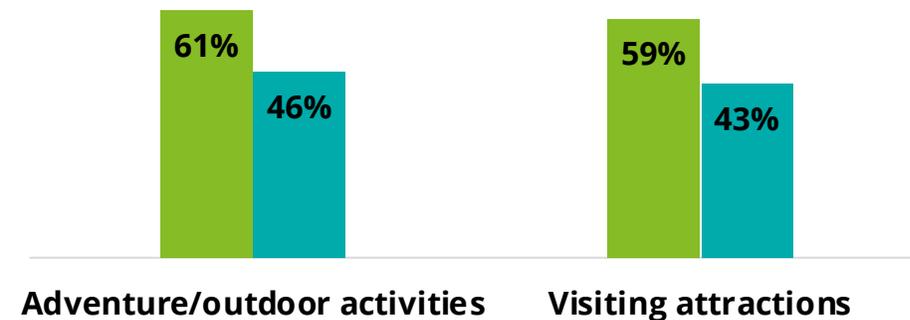
Motivations and participation

Trips for families with kids are more motivated by **reconnecting with family and friends, relaxation, and summer traditions**.

Eight in 10 pick their destination based on the **unique attractions and activities offered**. Participation levels are higher for outdoor activities among this group.

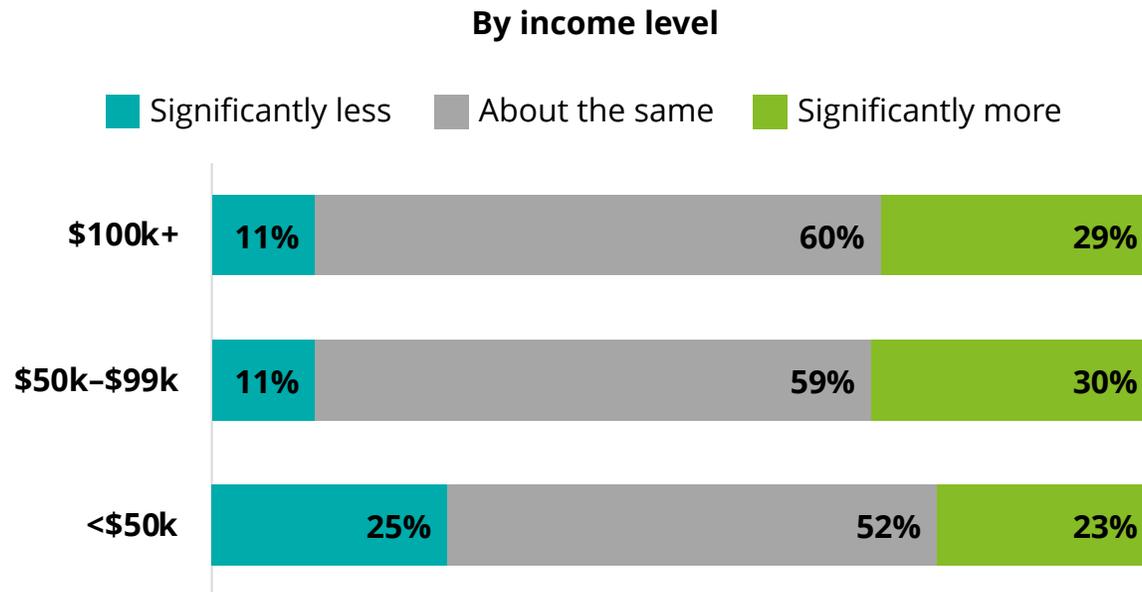
Participation in activities

■ Families with kids ■ Families without kids



Financial concerns drive reduced travel spend for lower-income travelers, while mid- to higher-income groups are taking shorter trips and saving up for an international one.

How does your 2022 summer travel budget compare to 2019?



Why more?

Travelers with household income of **\$50K-\$99K and over \$100K** are 3X and 4X as likely, respectively, to increase their budgets because they are **leveraging their jobs' work-from-home policies**.

Why less?

Travelers with income under \$50K are reducing spend due to financial concerns while **higher-income groups** are taking **relatively shorter trips and saving up for future international travels**.

Source: Deloitte 2022 summer travel survey, N=1,960

Note: Highlighted values in the tables represent a wide gap in reasons to increase or decrease spend by each income group.



Laptop luggers

Laptop luggers

Workplace flexibility creates a new and lucrative traveler type

COVID-19 has presented unprecedented challenges to the travel industry. But as conditions improve, one pandemic-driven societal shift is presenting new opportunities: work-from-home and location-flexible work arrangements.

This summer, 1 in 5 travelers plan to bring some work along on their vacation. For these laptop luggers, favorable conditions for productivity are an important part of choosing their lodging and destination. Addressing their needs might require some extra effort, but that should pay off for travel providers. Laptop luggers represent a lucrative and growing opportunity. They are taking more and longer trips, and most attribute at least one trip this summer to the ability to work remotely.

While it is debatable what amount of remote work that will persist over the long term, it appears many employers will keep a higher level of flexibility compared to prepandemic. That flexibility should represent at least a marginal opportunity for a large number of travel suppliers—and for some, the opportunity could be major.

Laptop luggers are traveling for longer, with larger groups and spending more than disconnectors.

1 in 5 travelers will at least partially work over their marquee summer trip, while the rest completely disconnect

Income level

<\$50K	x
\$50K-\$99K	1.5x
\$100K+	2x

Age

18-34	5x
35-54	4x
55+	x

These laptop luggers predominantly belong to **younger and wealthier traveler groups**

Laptop luggers to spend more, take longer trips, move in groups

Larger travel party: Laptop luggers will travel in larger groups; three in 10 will travel with 3-5 people, often including children.

Higher spend: Four in 10 laptop luggers say their trip budget exceeds prepandemic levels, compared to 25% of disconnectors.

Longer trips: Laptop luggers will take longer trips this summer. 3 in 4 say their longest trip will last one to three weeks.

Trip extensions: Four in 5 laptop luggers are extending their trip due to the ability to work remotely. One-third are extending their trip by 1-2 days and another third by 3-6 days.

Laptop luggers value some aspects—namely comfort, loyalty points, safety, etc.—more than others when shaping their summer trips.

How do laptop luggers differ from disconnectors?*

Luxury seekers

1.6x as likely to have **higher than prepandemic trip spend**; be **international travelers** (+10%); buy **expensive flight tickets**—first class (+8%) and upgrades (+10%); pick **hotels for the luxury** (+16%); 4x as likely to ensure the **availability of desired amenities** at hotels.

Loyalty pursuers

Earning and using loyalty points is more of a driver for laptop luggers than disconnectors when picking their airlines (+16%) and lodging (+24%).

Careful travelers

Destination influencers that laptop luggers consider more than their peers include geopolitical conditions (+24%), quarantine requirements (+22%), messaging (+21%), social distancing norms (+21%), CDC guidelines (+17%), and crowd avoidance (+17%).

Rental customers

2x as likely to stay at **private rentals for the first time during the pandemic**, and nearly 1.5x as likely to **continue using them in half or more future trips**.

Travel time-savers

Laptop luggers are **trying to reduce time spent on travel**—they give time higher value when picking destinations (+14%) and flights (+14%) and are more likely to drive shorter distances (+15%).

Environments that allow for productivity during vacation are appealing to most travelers, not just those planning to work.

While 1 in 5 US travelers plan to work on vacation, **many more factor a favorable environment into their travel decisions.**

These travelers could be accommodating others in their travel party or preparing so that their travel plans won't suffer if they cannot completely disconnect.

Travelers considering ability to work remotely in destination and lodging selection

		<i>Change in influence (vs 2021)</i>
Destination selection	37%	+5%
Lodging selection:		
Hotels	51%	+12%
Private rentals	54%	+19%

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Insights



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.

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