



# Travel Trends for a Post-COVID World

May 2020



**\$1.2 Trillion**

Total economic loss

**\$80 Billion**

Lost tax revenue

**8 Million**

Total unemployment loss

**9x Worse**

Than the impact of 9/11

**The projections are devastating.**

**The stakes are high.**

**The competition for travelers will be fierce.**

**Even though fear can be paralyzing.**

**We must not forget why people travel.**



# Travel improves lives.

Traveling helps us grow, learn, empathize, connect.  
It gives an outlet, a release.  
It creates clarity, helps us dream and inspires betterment.  
Now more than ever, we will need to travel.  
And the world will need travelers.





# Our values drive our actions.

Core values are our guiding life principles. They form the foundation of our identity and our dreams.

At BVK, we build travel brands that leverage core human values to create brand craving.

As humans, we crave experiences that reflect our values and get us closer to the types of people we want to be.

In times of crisis, our values remind us of what matters and help us push toward a better future.

More than ever, they will drive our decisions and guide our new reality.



**BVK's travel trends are oriented around human values because what travelers crave will drive their behavior and should define our actions.**

**"Humans need to travel. That is a fundamental aspect of what it is to be human."**

- Ross Dawson, author and futurist





# The Format

## Core Value

The primary human value that drives cravings and decision-making post-COVID.

## Signals

Research, data and consumer behavior to support the value's importance.

## Manifestations

Predicted travel trends post-COVID as consumers seek to fulfill these cravings.

## Implications

Thought-starters and focus areas to apply these values and trends to organizational decisions.



# Control

Able to influence one's self and surroundings as desired.

Asserting power.

Able to predict, manage, and successfully react to the occurrence of stressful events.

“People want to get out — just within their own control.”

Tori Barnes



Americans are willing to sacrifice privacy to give themselves greater control over their own health.

84%

Would support a required health screening before someone could be allowed to enter crowded spaces.

Source: Harris Poll

71%

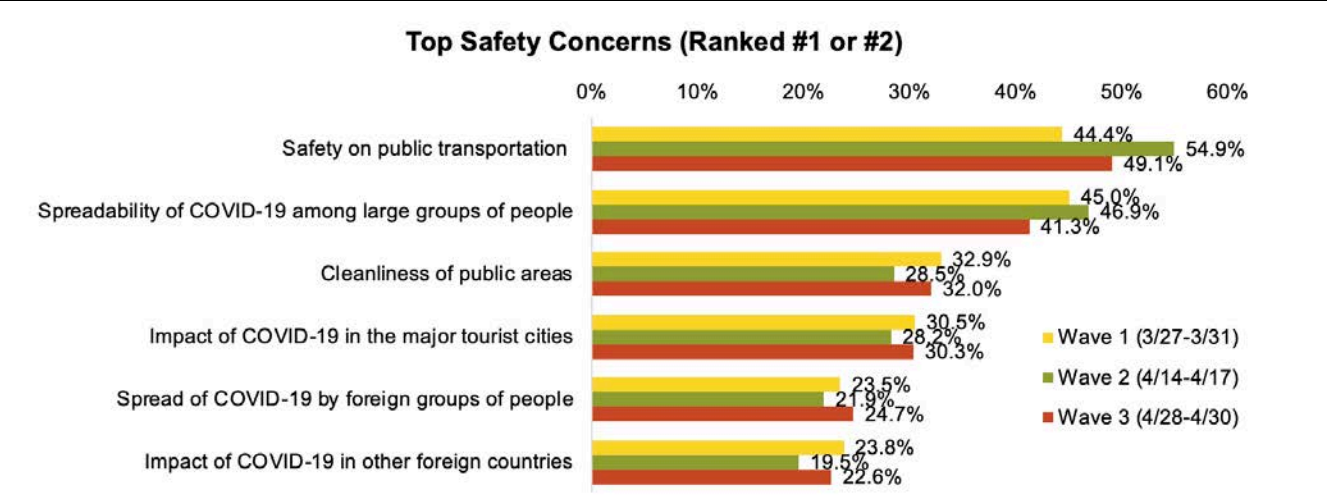
Are willing to share their own location data and receive alerts about possible exposure to the virus.

Source: Harris Poll

Top safety concerns for travel include cleanliness and spread-ability.

50%

Of travelers believe travel will be at least somewhat safe when restrictions are lifted



Source: BVK

While widespread restrictions and protocols are in place, Americans remain wary until a vaccine is available.

62%

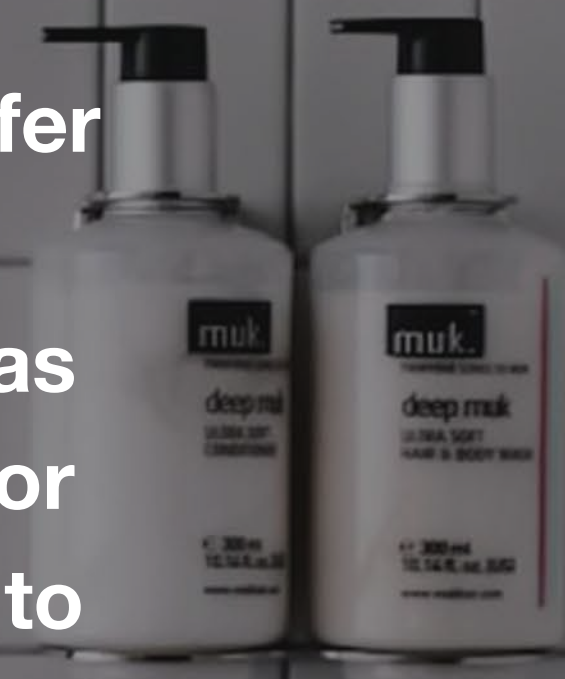
Say a C19 vaccine would be necessary to resume normal activities such as flying, going to the gym, etc.

Source: Harris Poll



# Sanitary Stays

Comfort takes on new meaning as lodging brands scramble to offer peace of mind to travelers with sanitation at the top of their list. Uncommon partnerships with health and hygiene brands as well as pledges for clean will become the norm. Brands may sacrifice prior quests for sustainability by offering plastic-wrapped accessories to assure travelers that health of guests is of utmost concern. The hospitality industry will inevitably become less human as less workers will be visible. Travelers will welcome these changes and shun brands that don't enforce strict protocols. Health trumps comfort as we seek to still travel in this new sanitation era.





# Automation for Human Pursuits

Biometrics and robotics have historically made people less connected as they inherently create less human-to-human contact. However, technology will be a key tool in removing human contact in order to enable humans to connect with others and the world. From Apple and Google's latest innovation to electronic passports/IDs, boarding passes, medical screenings, and robot cleaners, contact between humans will be limited by technology in order to allow people to experience the world again. Together.



# Isolation is Luxury

Exclusive experiences were a social-media induced travel trend as travelers desired the “badge value” of rare experiences. These will still be craved but the impetus has shifted. Exclusivity will not just be about doing something others *have not*, it will be about finding experiences where others *are not*. Isolated experiences will be the new luxury. Private tours and exclusive experiences will help attractions gain traction in this post-COVID world.



### WHAT

A touchless society and precedent of cleanliness will change the way people interact with the world and will shift their expectations for travel.

### SO WHAT

Travelers will prioritize cleanliness over comfort. The new badge of exclusivity will be about isolation. Automation will pave the way for greater human experiences.

### NOW WHAT

Seek to balance inspiration and safety when communicating to future travelers. Look beyond basic health and safety measures to provide luxury in the form of isolation through private tours, exclusive experiences and contactless exchanges.







# Wellbeing

The state of being comfortable, happy and healthy.

Encompassing physical, emotional, intellectual, spiritual, social, and economic wellness.

Fulfillment, satisfaction and purpose.

“There will be a PTSD sort of response. Lives are going to be very different after this.”

Amanda Schara, UnityPoint Health licensed mental health counselor



COVID-19’s disruption has had a profound negative impact on emotional and mental health.

41%

Of Americans report high levels of “hopelessness”

Source: NORC at the University of Chicago

1,000%

Increase in the number of people calling a federal emergency hotline for emotional distress YOY.

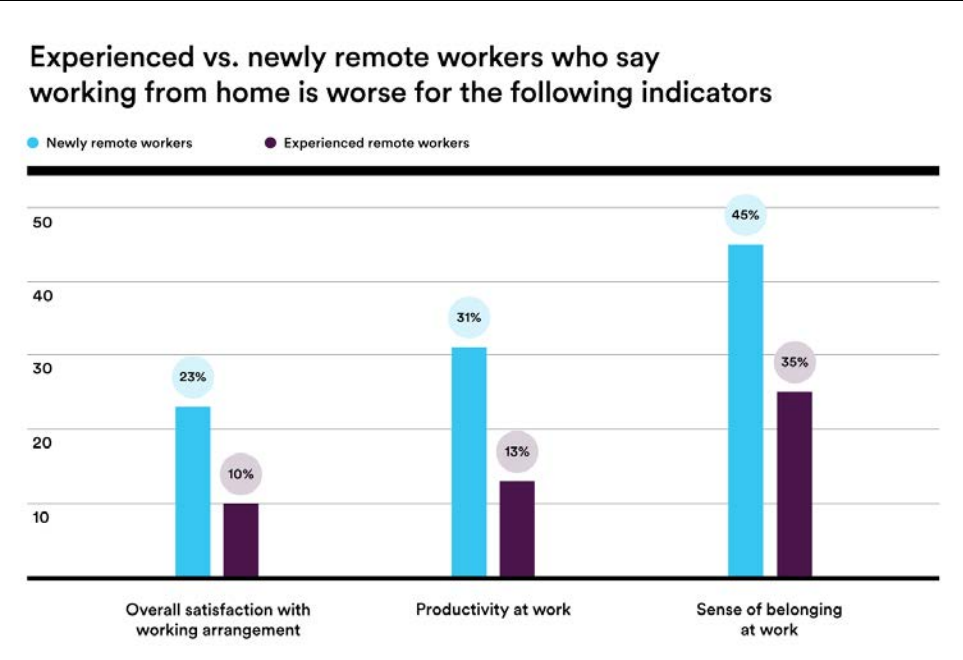
Source: U.S. Government

Remote work has compounded new challenges as work/life balance takes on new forms.

+3hrs

Homebound US employees are logging 3+ hours more per day than before lockdown

Source:Bloomberg



Source: Slack

Stressed parents are more eager than non-parents to resume normal travel behaviors.

Are currently planning a future trip.

47% 30%

Parents Non-Parents

Source: BVK



# Restorative Retreats

Health has taken center stage. Society is focused on healing: mentally, physically and spiritually. As people seek to overcome adversity and find assurance, spiritual and alternative healing practices rise. From vortexes to holistic healing, angles that promote restoration, respite or rejuvenation will matter most. Destinations that don't naturally offer that will likely create healing packages to boost restorative travel.



# PTO Precedence

America's workaholic culture has created an infamous struggle to take time off with majority of workers leaving paid vacation days on the table. But COVID-19 has reoriented priorities. Family, safety, and physical health matter more. But so does mental health. We will see a rise in percentage of PTO days used and a rise in the norm of mental health days as we desire to find new norms for balancing work life and sanity.

Breathe



### WHAT

As physical health is less of an imminent threat, society will resurface its efforts on the importance of mental health and wellbeing.

### SO WHAT

An increase in PTO days, mental health breaks and rejuvenation retreats will rise as travelers reach for betterment and healing.

### NOW WHAT

Travel offerings that promote restoration, respite or rejuvenation will matter most. Seek out new ways to provide wellbeing but be sure to remain authentic to your brand.







# Community

A body of people defined by either common interests or a common location.

A feeling of fellowship with others.

A group defined by caring for and contributing toward one another.

“By making kindness a choice, we are investing together in humanity.”

Gabriella van Rij, Chicago Tribune



Consumers and travelers are more likely to trust local sources of influence.

78%

Trust in local government vs. 54% federal government.

Source: Harris Poll



Source: BVK

Americans reprioritize their core values around community, caring and empathy.

89%

Agree that Americans have a responsibility to each other to take preventative measures to limit the spread of COVID-19.

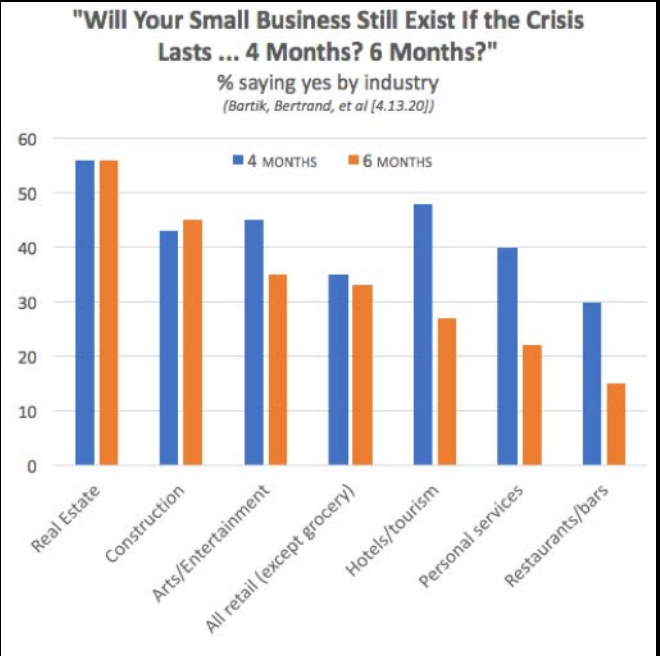
Source: Harris Poll

26%

Say COVID-19 has reframed the American Dream around community and empathy.

Source: Harris Poll

Small businesses struggle and consumers rally to contribute to their local communities.



Source: National Bureau of Economic Research

45%

Of Americans have an even more positive view of small businesses now.

Source: Harris Poll



# Local Tourists

The number of Americans saying they will take a staycation this summer continues to rise. As people ease into travel, they will look to their own backyards for exploration. This is compounded by an increasing desire to support local businesses. Embracing radical localism will be the first wave of travel post-COVID and destinations need to be ready to engage locals, spark community travel and prepare locals for future outsiders. Travel will begin by those closest in.





# Purposeful Foodies

Food is a powerful connector. Sharing it sparks understanding, openness, and adventure. Food gives meaning to a place. Chefs and local restaurants have a lasting impact in sharing the flavors, tastes and pride of communities. These local chefs tell stories, bring a point of view and help shape the cuisine of a destination. More importantly, local chefs help others appreciate and understand the culture of a destination. Restaurants have been hit hard from COVID, and fear that the pandemic could eradicate this experience will bring a new form of foodie travel - one focused on supporting the local flavors of a community and the livelihood of its chefs.



### WHAT

Localism will be the gateway to tourism as travelers cautiously venture out into their communities and the world.

### SO WHAT

Embracing local tourism and welcoming travelers will be key to preserving and growing communities. Foodie travel will usher in a new purpose of supporting livelihoods and local flavors.

### NOW WHAT

Seek out opportunities to understand local sentiment, empower residents as tourists and highlight the people and flavors that make the community unique. Find new funding models that account for local tourism.







# Meaning

Being worthwhile, of substance and importance.

Integration with one's purpose in life.

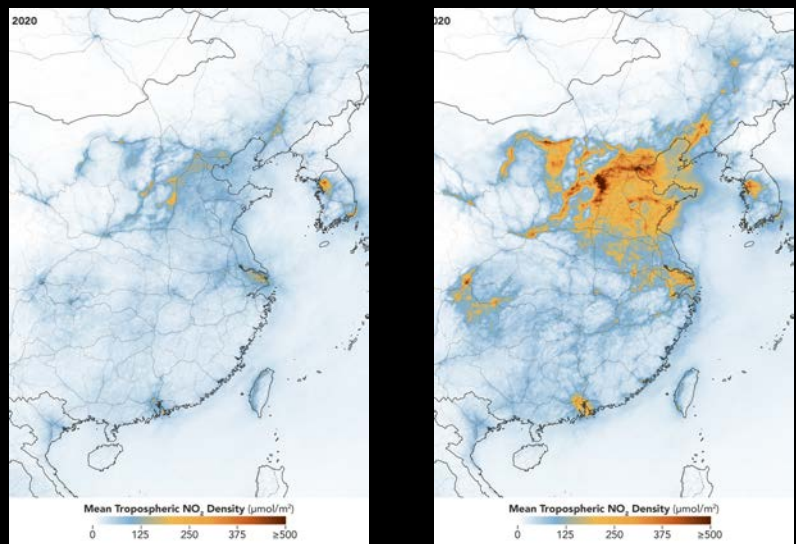
Having strong impact.

“This is the moment we are going to connect  
bodily health to planetary health.”

Professor Kate Raworth



COVID-19 has created positive momentum for sustainability.



Source: NASA

19%  
Of people care more about sustainability post-COVID.

Source: Ipsos

Purpose-driven brands that contribute in times of trial build long-term connections.

62%  
Of US consumers support brands that do more good than harm to society.

Source: Kantar

Consumers are re-prioritizing experiences over possessions.

Large Purchase Category	% of consumers who prioritize the purchase first
Vacations/ Trips	30%
Flights	11%
Clothes	9%
Car/ Vehicle	8%
Home Appliances / Devices	6%
Home Furnishings	6%
Personal Electronics	5%

Source: Global Web Index



# No Regrets Trips

Life changed in the blink of an eye. Many people are filled with regret over lost opportunities and delayed decisions. Safety concerns may postpone travel initially, but people will be gearing up to take the trips they've longed for because they're now living with the very present feeling that life may change again, and they don't want to be filled with regret when it does. Bucket-list travel and milestone travel will accelerate as people will meaningfully mark moments that matter.





# Earthly Pursuits

COVID-19 let the planet breathe. While so much of life was negatively affected, COVID has positively helped the environment. Prior to the pandemic, travel sustainability efforts were growing at a rapid pace. While the sentiment is still strong, many travelers and brands will find themselves opting for single-use plastics, sacrificing sustainability for safety. This lingering tension will increase counter-efforts for the planet. Travelers will expect brands to invest in environmental practices that offset their guilt as well as carbon footprints.



# Enrichtrips

While many people missed old routines in the times of COVID-19, they also sought growth and learning. From new recipes, to projects, to start-ups, isolation has brewed creativity and a desire for contribution. This newfound ingenuity will guide travelers to seek experiences that teach them, grow them and change them. They will also seek experiences that help them contribute to, grow and change the destination by imparting their own skills during travels. This enriching exchange will have an indelible effect and build a more powerful connection with the destination's people and places.



## MEANING | IMPLICATIONS

### WHAT

Post-COVID, travelers will desire trips that have greater meaning and impact for each other, the community and planet.

### SO WHAT

As travelers sacrifice sustainability for safety through things like single-use plastics, they will look to overcome that guilt with an increased expectation on themselves and travel brands to offset those choices with sustainable acts. Bucket list trips and “enrichtrips” focused more on personal development and less on souvenirs will trend.

### NOW WHAT

Pursue ways to better your guests, community and the planet. Create meaningful growth opportunities and once-in-a-lifetime experiences.







# Freedom

The power to think, act, or speak without restraint.

Independence or self-direction.

Ability to act on one's desires.

“Freedom is the oxygen of the soul.”

Moshe Dayan

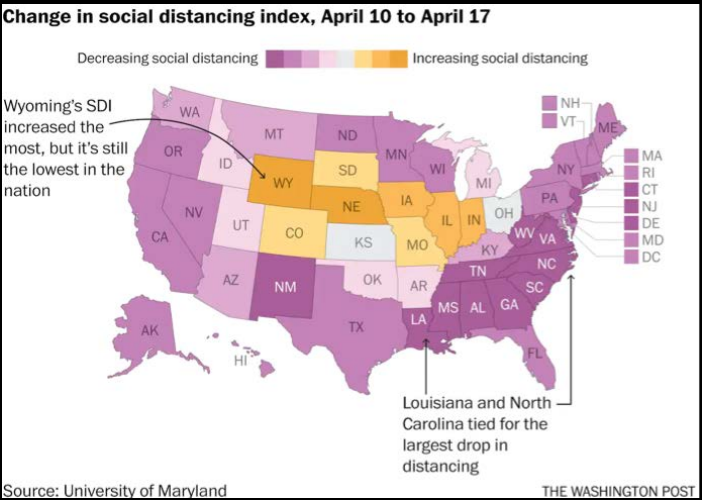


Quarantine fatigue + states reopening has more Americans staying home less.

56%

Of Americans feel frustrated from being cooped up at home.

Source: Ipsos



Source: The Washington Post

Travelers don't want to see masks and prefer normalcy in destination advertising.

64%

Of travelers would like to see destination ads without masks/PPE as it communicates normalcy.

Source: BVK

Travelers are looking forward to distance, but the kind of distance they choose.

55%

Of travelers are most looking forward to outdoor, remote/rural or small town trips.

Source: BVK



# Into the Wild Pursuits

Inner adventurers have been pent-up. As travelers emerge from homes, they will seek release and reconnection with the wilder pursuits of the world. Wide open spaces beckon and travelers will take to the open road, the less-traveled path and the never-ending horizon. For families, couples and solo travelers, nature and wildlife will win over museums and monuments. Freedom-seekers will relish in ample space to stretch minds and muscles, to express themselves without reservation and push boundaries without restriction.



# Off-Season Ventures

To seek freedom and avoid crowds, travelers will be more likely to seek out off-season travel. The off-season unlocks new adventures, where travelers get to experience destinations more like locals. Off-season travel will help boost the industry by providing new outlets for locations with shorter tourism seasons. And it will provide travelers with more genuine, safe experiences away from packed crowds. Off-season travel gives people freedom to relax and connect with the destination in a more natural way.



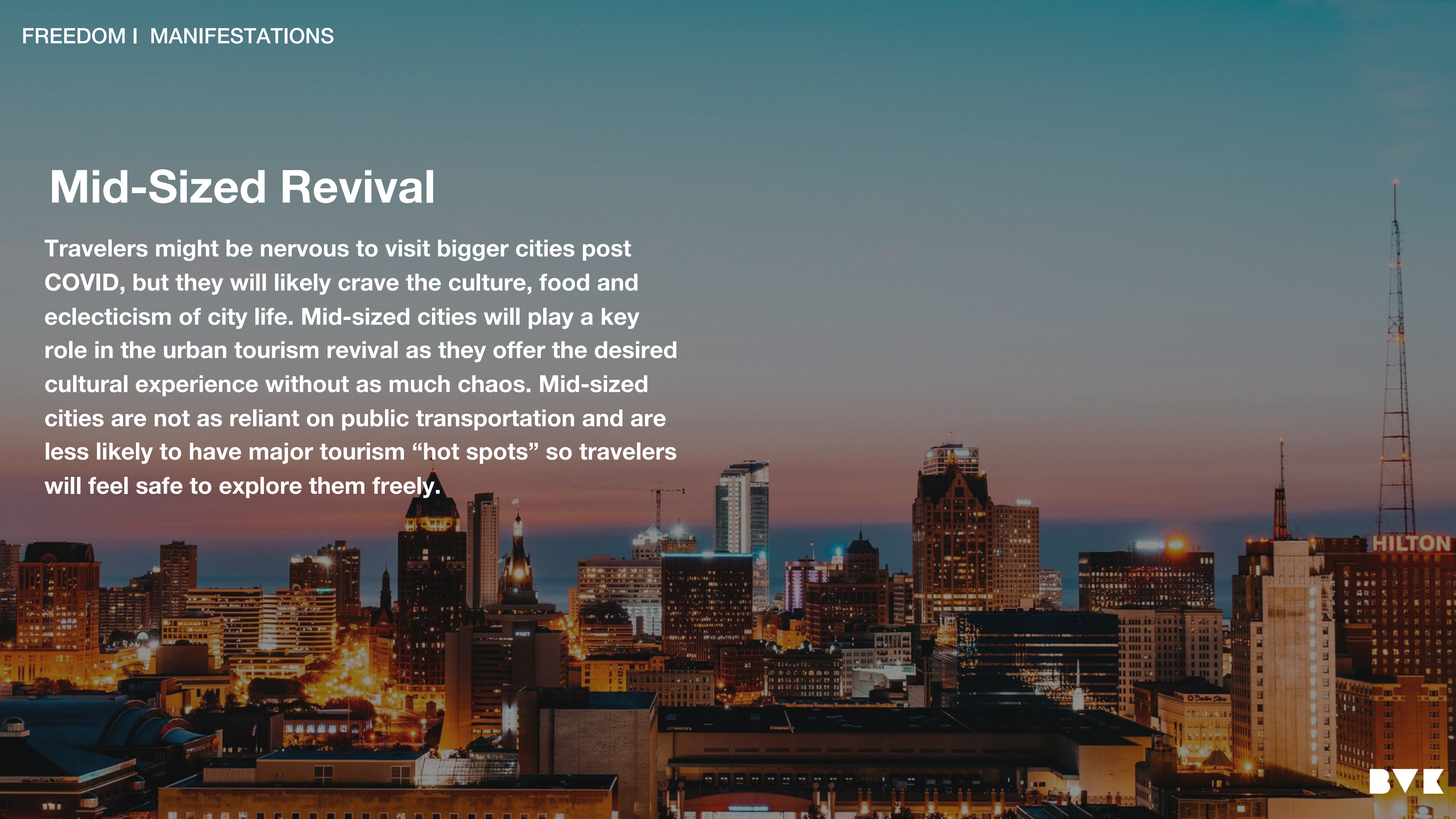
# Nomadic Workforce

The rise in comfort and familiarity with remote work will change the way organizations do business. While the business travel market may be negatively impacted by the shift to remote work, “bleisure” travel will take on new meaning. As people realize that they can literally work from anywhere and as they have gotten used to blending work + life...we will see longer work-cations, a rise in sabbaticals, and a rise in a nomadic workforce where individuals relish the freedom to roam and work from the world.



# Mid-Sized Revival

Travelers might be nervous to visit bigger cities post COVID, but they will likely crave the culture, food and eclecticism of city life. Mid-sized cities will play a key role in the urban tourism revival as they offer the desired cultural experience without as much chaos. Mid-sized cities are not as reliant on public transportation and are less likely to have major tourism “hot spots” so travelers will feel safe to explore them freely.



HILTON



### WHAT

People view freedom to roam as a primary human right, so being cooped-up is stifling the human spirit.

### SO WHAT

Travelers will take to the road, seeking wide open spaces, and prioritizing offseason travel. They will discover vibrant culture without as much chaos in smaller cities. They might even set up their work-life in a more nomadic style.

### NOW WHAT

Destinations that not only offer physical space, but also freedom of expression, will soar. Differentiate how your wide-open — or confined spaces — offer freedom to work and/or play.





# Simplicity

The state of being natural or uncomplicated.

Appreciation of small things.

Avoiding complexity, waste or greed.

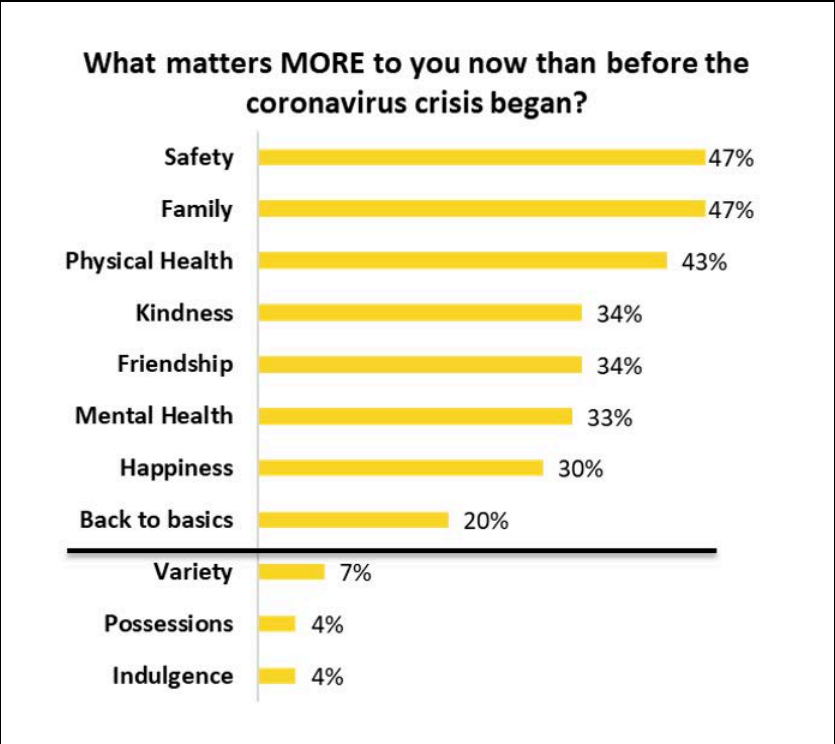
“For the longest time, I have felt that there’s been too much world.”

Olga Tokarczuk



Americans are emerging from COVID with a renewed focus on the basics: taking care of oneself and others.

During isolation, people have sought comfort and escape in simple, nostalgic pleasures.



Source: Ipsos

1,000%

Increase in searches for “yeast-less bread” on Pinterest during COVID.

Source: Pinterst

322%

Increase in searches for “self care at home” on Pinterest during COVID.

Source: Pinterst

59%

Increase in Campell’s soup purchases YOY.

Source: NY Times

6.1M

Live views of “The Last Dance” episodes 1 and 2 across ESPN & ESPN2

Source: ESPN Press Room



# Mindfully Minimalist

People have learned to live with less during COVID, making sacrifices and compromises, ultimately emerging with a renewed appreciation for the basics. The understanding that they can get by and thrive with “just enough” will lead them to crave places that have a simple lifestyle – farms, agritourism, bucolic countrysides. States and places that may have been overlooked due to having less might now be viewed as offering more - in their simplicity.



# Awakened Senses

Senses represent a basic mechanism for how people experience the world and are many of the driving factors of travel: anticipation of what will be seen, smelled, tasted, touched and heard. The salt air, the street food. Those are the elements of atmosphere. Quarantine life has created a sensory deprivation. People became isolated and stuck in routine and will be seeking physical, tactile experiences that make them feel alive again. Sensory experiences will draw people in and wake them up to the world around them and the life within them.



## Like a Child

COVID-19 has reconnected many with the joys of childhood, from nostalgic throw-backs like board games to comfort foods. Travelers will look to experience playful pleasures of childhood in the outdoors. Families and adults alike will take more active vacations, focusing on pursuits that bring childlike joy. Museums, attractions and theme parks may appeal to the desire to see the world again with wonder. This prioritization of nostalgia will lead travelers to revisit experiences of the past and create new memories for the future.



# Carefree Retreats

Many Americans, especially parents with kids in the household, have been navigating compounding responsibilities during COVID. They've been orchestrating, teaching, foraging, working, cleaning, etc. They desperately need an escape. One where the evening meal and daily entertainment is not their responsibility. From cruises to attractions and all-inclusive resorts, stressed travelers will (cautiously) seek outlets that alleviate responsibility. Letting them simply relax and recharge. The pressure will be on these often-crowded escapes to communicate safety in order to usher in relaxation.





## **WHAT**

**COVID-19 has created a revaluation of priorities, and many Americans are emerging with a renewed focus on living with less to experience more.**

## **SO WHAT**

**Simple moments of meaning become indelible memories as sensory travel, minimalist locales, carefree retreats and childlike pursuits all rise.**

## **NOW WHAT**

**Travel pursuits will become less complex as the stressed-out look to balance safety with the simplicity of rest and relaxation. Cultivate opportunities for pure joy, nostalgic pleasures and sensory escapes.**





**Thank You.**