

TRAVEL INSIGHTS



NOVEMBER 2021

HOLIDAY TRAVEL

After nearly two years of paused travel plans and cancelled get-togethers, Americans are eager to venture out this holiday season. Over half of all Americans plan to travel for at least one holiday this year, signaling increased confidence in the safety of travel. Recent developments like the Pfizer-BioNTech's coronavirus vaccine for 5- to 11-year-olds and the opening of international travel to the U.S. will catalyze a more normal holiday season of traveling and gathering together and will increase travel throughout this winter.

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INTRO

63%

Nearly **63%** of all Americans aged 18 or older (161 million adults) will travel for at least one holiday this year (a **37%** increase from 2020).

- THE VACATIONER SURVEY 2021 HOLIDAY TRAVEL SURVEY VIA
TRAVEL DAILY NEWS

82%

82% of Americans who are traveling for the holidays indicate that they will be traveling throughout the winter season as well.

- VACASA HOLIDAY AND WINTER TRAVEL TRENDS

Parents welcomed the news that Pfizer-BioNTech's coronavirus vaccine for 5- to 11-year-olds has been approved by the CDC, another step to a return to normal.

- TRAVEL PULSE



COVID CONSIDERATIONS

Consumers are greeting this holiday season with a greater sense of confidence and excitement. There is a sense of determination – fewer travelers are willing to change their travel plans or adjust their holiday traditions due to COVID-19. Yet, COVID-19 is still a consideration – many consumers support vaccination verification as a travel requirement and are choosing destinations with minimal crowding and strong COVID protocols.



40% → 19%

Last year, almost **40%** of U.S. consumers reported having to adjust their holiday traditions due to COVID-19, compared to **19%** this year.

– VACASA HOLIDAY AND WINTER TRAVEL TRENDS

>27MILLION

More than 27 million people say their primary mode of travel this Thanksgiving will be by plane – 3x more than the 9.5 million people who traveled by plane for Thanksgiving in 2020.

– THE VACATIONER SURVEY 2021 HOLIDAY TRAVEL SURVEY
VIA TRAVEL DAILY NEWS

43%

Nearly **43%** feel more comfortable traveling this holiday season than last year.

– THE VACATIONER SURVEY 2021 HOLIDAY TRAVEL SURVEY VIA
TRAVEL DAILY NEWS

49%

People seem more determined to travel this year: just **49%** say they would change travel plans if there was a COVID-19 spike where they are traveling to, which is down from nearly three-quarters of people who said they would change plans in 2020.

– VACASA HOLIDAY AND WINTER TRAVEL TRENDS

70%

70% of consumers said they favored vaccination verification while traveling. And more than half (**56%**) supported policies that would prevent those without proof of vaccination from traveling.

– PWC HOLIDAY OUTLOOK 2021

Top destination selection drivers:

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

– DELOITTE HOLIDAY TRAVEL PLANS SURVEY

TRIP TYPES

While many will seek intimate, cozy Airbnbs or relaxing, warm-weather destinations, urban destinations are experiencing a comeback: cities like New York City are one of the most popular trip types. Travelers also plan to continue the tradition of visiting their hometown or college town for the holidays. With travelers' increased confidence in travel safety, they will look to take guided tours, visit major destinations and attend ticketed events. Destinations with holiday festivals and light displays will be especially appealing.

#1

Cities are the top destination for holiday travelers' longest trip this season (**42%**) followed by beaches at **22%**.

- DELOITTE HOLIDAY TRAVEL PLANS SURVEY

ACCORDING TO
AIRBNB, CABINS ARE
THE SITE'S TOP
UNIQUE LISTING FOR
THE HOLIDAYS.

- MARTHA STEWART

TOP ACTIVITIES FOR HOLIDAY TRAVELERS

Dine at a restaurant (**65%**)

Visit a major attraction (**38%**)

Engage in adventure or outdoor activities (**33%**)

Take a guided trip or tour (**29%**)

Attend a ticketed or public event (**23%**)

- DELOITTE HOLIDAY TRAVEL PLANS SURVEY

New York City came in as Tripadvisor's No. 1 most popular destination for American travelers this winter for the first time since the COVID-19 pandemic began.

- TRIP ADVISOR VIA TRAVEL + LEISURE

37% **37%** of travelers will visit their hometown during this holiday season or winter.

- VACASA HOLIDAY AND WINTER TRAVEL TRENDS

Travelers are eager to return to their college towns this Thanksgiving, where they'll root for their alma mater and visit friends. Trends show that people are traveling to mid-sized cities and towns with popular college football programs, including Ann Arbor, Michigan, Eugene, Oregon, Lincoln, Nebraska, and Auburn, Alabama.

- MARTHA STEWART

Towns with spectacular holiday festivals and light shows are also popular destinations among travelers.

- MARTHA STEWART

SPLURGING OVER SKIMPING

Consumer confidence is not only increasing in travel safety – Americans now feel more confident in their financial security. This year, money is no object to many consumers. They're treating themselves and others – to travel, gifts and experiences. Consumers will seek travel brands with unique experiences and gift ideas, options to upgrade and opportunities to spread holiday cheer.

46%

Domestic travelers have increased their trip spending by an average of **46%** this year compared to just two years ago.

– FORBES

93%

After falling dramatically in 2020, consumer spend on experiences is expected to come back strong. **93%** of Americans' increase in expected holiday spend is in the experiences category, including travel in addition to entertainment at home, restaurants, concert tickets, etc.

– DELOITTE HOLIDAY TRAVEL PLANS SURVEY

20%+

More than **20%** will spend more than \$500 on Thanksgiving travel, which includes gas, flights, hotels, tickets, etc.

– THE VACATIONER SURVEY 2021 HOLIDAY TRAVEL SURVEY
VIA TRAVEL DAILY NEWS

40%

With savings on the rise over the past year, almost **40%** of consumers said the pandemic would not affect their ability to spread holiday cheer this year. And **30%** of consumers overall said they will spend more this holiday than they did last year.

– PWC HOLIDAY OUTLOOK 2021

↑13%

Consumers will spend an average of \$1,447 on gifts, travel and entertainment this year – up more than **20%** over last year when the pandemic ground most holiday travel to a standstill. Even compared to the pre-pandemic 2019 season however, spending is up **13%**, as consumers seek respite at the holidays.

– PWC HOLIDAY OUTLOOK 2021



FAMILY TIME

With the COVID-19 vaccine providing more confidence in group gatherings, travelers are seeking to make up for lost family time and missed holidays. While most will get together with friends or relatives, some with 10+ people, many are planning on smaller groups or requiring protocols for participating in the gathering. For parents, the vaccination status of their children is an important holiday travel decision driver, and approval of the vaccine for 5 to 11-year-olds could not have come at a better time.



63%

63 percent of Americans believe that making memories with loved ones is one of the most important reasons they travel.

- EMERGING TRENDS FOR THE HOTEL INDUSTRY BY HILTON

1/4

A quarter of consumers who either are already vaccinated or plan to be before traveling next say that being unable to see family and friends last holiday season is among their top two motivators for traveling.

- VACASA HOLIDAY AND WINTER TRAVEL TRENDS

TOP REASONS FOR A TRIP RIGHT NOW ARE

Relaxation (**44%**)

Stress relief (**22%**)

Reconnecting with family and friends (13%)

- KANTAR

91%

Over **91%** will eat Thanksgiving dinner at home or a friend or relative's home, with 3 in 10 attending a gathering of 10 people or more.

- THE VACATIONER SURVEY 2021 HOLIDAY TRAVEL SURVEY

VIA TRAVEL DAILY NEWS

The vaccination status of children affects the holiday plans of many Americans. One in 10 Americans younger than 55 list it as a reason to stay home and 1 in 7 list it as a reason not to stay in paid lodging.

- DELOITTE HOLIDAY TRAVEL PLANS SURVEY

One in three American adults are unwilling to celebrate the holidays with unvaccinated people regardless of a negative test. Another **20%** of American adults will celebrate with unvaccinated people if they receive a negative test. About **47%** of people will celebrate the holidays with unvaccinated Americans regardless if they take a COVID-19 test beforehand.

- THE VACATIONER SURVEY 2021 HOLIDAY TRAVEL SURVEY

VIA TRAVEL DAILY NEWS

INTERNATIONAL CONNECTIONS

While the majority of American travelers have their short-term sight set on domestic trips, the opening of international borders has created opportunities for loved ones to be reunited, and travelers to start planning for their next big escape. Travel brands should help facilitate reunions between loved ones and anticipate a continual growth in international travelers.

94%

Of those who plan to travel this winter, **94%** of them are planning a domestic trip despite international borders opening up all over the world. But while most travelers plan to stay closer to home for the time being, some will still venture outside of their comfort zone as **37%** of travelers plan to go somewhere they haven't been before.

- TRIP ADVISOR VIA TRAVEL + LEISURE

37%

The 28 European countries that were barred under the U.S. policy that just ended made up **37%** of overseas visitors in 2019, according to the U.S. Travel Association.

- AP NEWS

"FLIGHTS ARE PACKED AS
INTERNATIONAL BORDERS
REOPEN AND TRAVELERS CAN
REUNITE WITH LOVED ONES."

- AXIOS

21%

As the reopening takes effect, carriers are increasing flights between the United Kingdom and the U.S. by **21%** this month over last month.

- AP NEWS

Nearly half of those that intend to change the way they travel going forward say they will travel more internationally.

- DESTINATION ANALYSTS





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