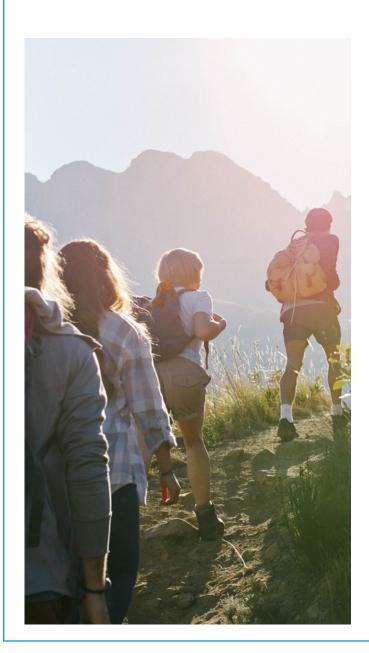


### -INTRODUCTION-



With few facets of our lives and world unchanged by the unparalleled impact of the Coronavirus (COVID-19) pandemic, travel too will be forever re-shaped by this extraordinary moment in time.

This report provides unparalleled new insights, data and research from a global study conducted by Booking.com into the Future of Travel.

The research spans 20,000 travelers across 28 countries, combined with proprietary search and endorsement data, to uncover the trends that will shape the way we experience travel in the year ahead, and beyond - predicting the unpredictable during these uncertain times within the travel industry.



**20,000** travelers







### **ARJAN DIJK**

Senior Vice President and Chief Marketing Officer at Booking.com



2020 has been a year like no other and while it will be some time before travel returns to pre-pandemic levels, all signs point to the fundamental and enduring role that travel plays in all our lives. It continues to bring moments of joy and inspiration to people across the globe during times of uncertainty, whether through dreaming and planning, or cherishing the trips we have been able to take.

Enhancing our understanding of one another and our common desire to explore beyond the horizon, I believe that travel has a unique potential to come back stronger than ever in the years ahead as a primary driver of growth, equality and prosperity for people everywhere. In the meantime, with our mission to make it easier for everyone to experience the world, we will be there for our customers offering the widest choice, great value and the easiest experience from anywhere and on any device so travelers can enjoy all of the unforgettable experiences this world has to offer.



#### **BOOKING.COM'S PREDICTIONS FOR THE FUTURE OF TRAVEL**

With over half (53%) of global travelers responding that they won't be comfortable traveling until a Coronavirus vaccine or treatment is in place, it may be a long time before we experience the world as freely as we did previously, but innovation within the travel industry will accelerate faster than ever to respond to marked shifts in travel expectations and behaviors.

Travelers will look for a heightened level of travel safety and more sustainable travel offerings, as well as evolve their preferences for where and with whom they travel. Newfound appreciation for doorstep delights will endure alongside an abiding love of the far flung, and travelers will find new ways to blur the lines between work and travel. All of which will catapult a demand for deeper value from the trips we book in the future.







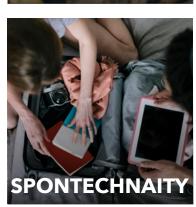














Amidst new waves of travel hiatuses, restrictions and continued uncertainty, our innate human desire to travel has not been dampened.

Travelers also report that they plan to take a similar number of trips both domestically and internationally in the 12 months after travel restrictions are lifted in their country as they did in the year pre-pandemic (March 2019 - March 2020).

65%

are excited about traveling again after lockdowns

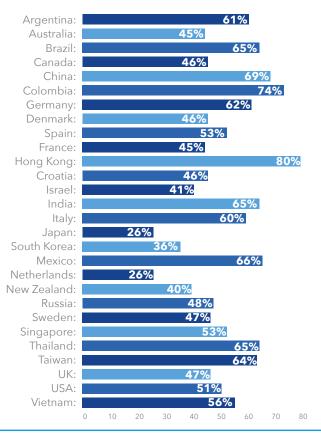
38%

will plan a trip to make up for a celebration missed due to Coronavirus

#### Our time at home has made us crave the world outside more than ever.

53%

of travelers have a heightened desire to see even more of the world.



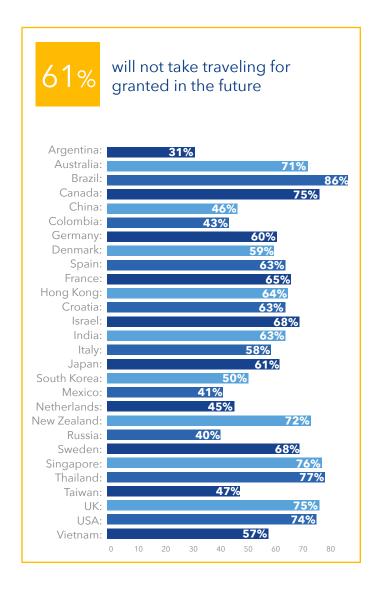
### **WANDERMUST**

40% 42%

intend to rebook a trip they had to cancel due to Coronavirus

want to travel more in the future to make up for time lost in 2020, rising up to 51% of Gen Z and 49% of millennials

We can expect travel companies to get creative in 2021 with new itineraries and recommendations designed to capture the imaginations of travelers who missed out on trips in 2020 and will be looking for somewhere stunning to explore to make their next trip more meaningful.



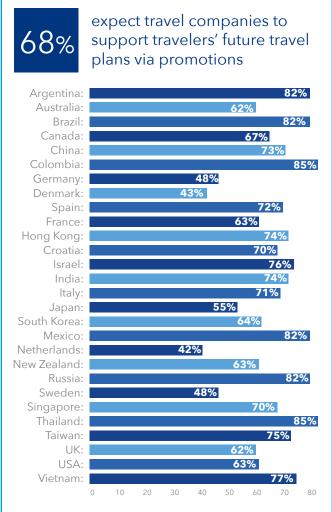


The financial legacy of Coronavirus will inevitably see people demand more bang for their buck in the future. 62% of travelers will be more price conscious when it comes to searching and planning a trip and 55% are more likely to hunt down promotions and savings, behaviors that are predicted to last years.

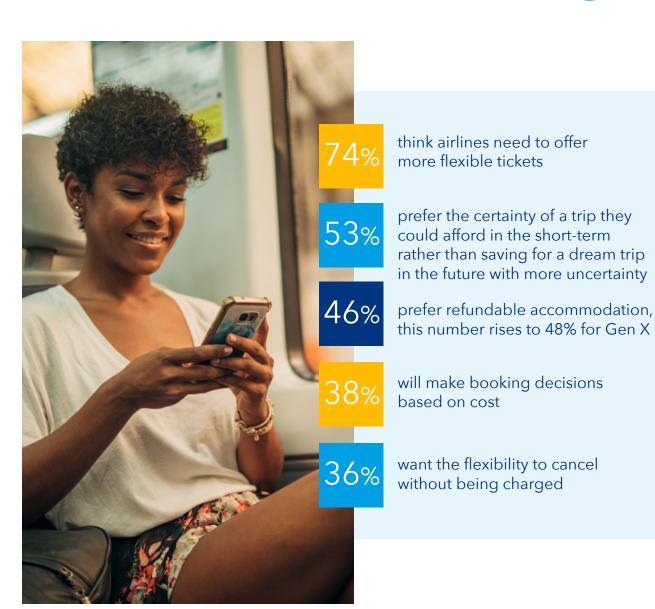
And while travelers are keen to support the industry in its recovery (70%) and want their future bookings to help rebuild communities around the world (67%), they will expect a lot more value beyond the price tag from the travel industry in return, such as:

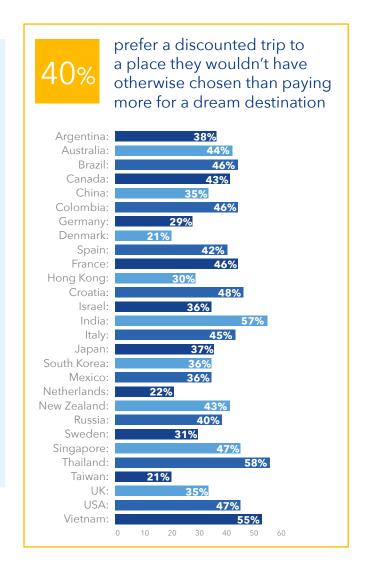
74%

want travel booking platforms to increase their transparency about cancellation policies, refund processes and trip insurance options



### #2 VITAL VALUE







As travelers navigate a new Coronavirus world, local travel has risen to the forefront as it remains easier, safer and often more sustainable.

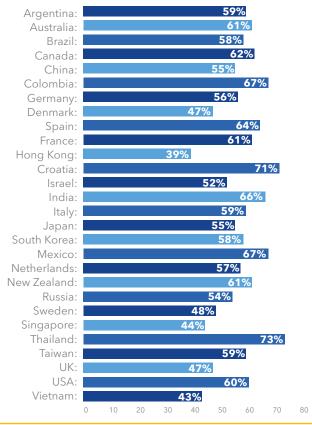
24%

are interested in seeking out hidden gems (e.g. new restaurants) to tell their local friends and family about, when travelling locally Looking ahead, staying closer to home and becoming familiarists rather than tourists will continue to retain its importance on travel agendas. 47% of people still plan to travel within their own country in the medium term (7-12 months-time), with 38% planning to do so in the longer term (over a year's time).

When it comes to local travel, 43% plan to explore a new destination within their home region/country and 46% will take the time to appreciate the natural beauty of their home country, while locally or not, half (50%) intend to travel somewhere they've already been previously for its familiarity.



are eager to travel to nearby regions/countries that are accessible by car



# FAMILARISTS NOT TOURISTS



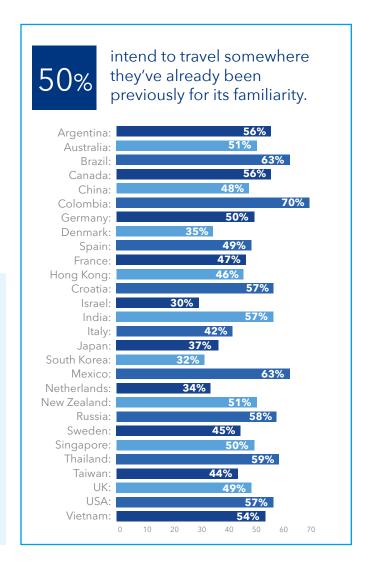
Doorstep delights offer both cost and time savings to which destinations and accommodations will respond by offering more historic and cultural heritage tours to educate and entertain visitors, as well as vying for tourists' affections through original offerings such as guest chefs and bespoke cocktails.

With use of Booking.com's 'pet-friendly' filter more than doubling since the start of travel restrictions\*\*, new and furrier breeds of travelers will also increasingly need catering for as we look ahead.

All this in turn will fuel a Renaissance of road trips to explore forgotten local gems, a renewed passion to support local business and communities as they seek to rebuild and inspire a newfound sense of pride in the history and beauty that's just around the corner.

21%

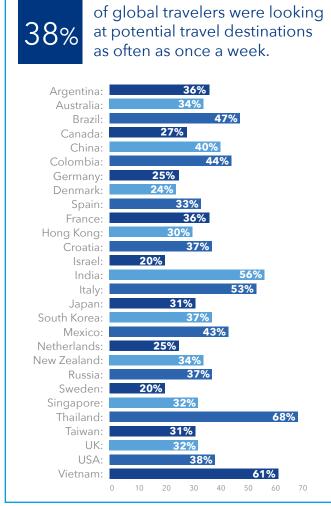
intend to travel to the other side of the world by the end of 2021, compared to only 6% by the end of 2020.





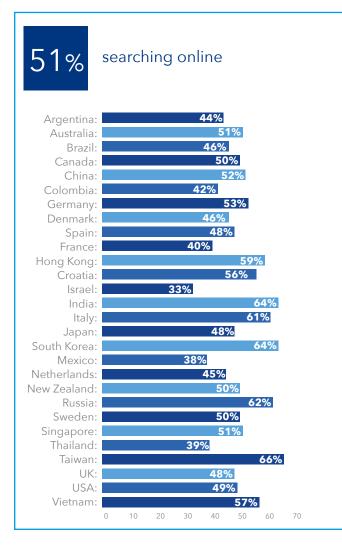
Our appetite to consume travel content, get creative with our travel plans and share our travel dreams with each other will continue to grow exponentially over the coming year.

Seeking comfort and distraction during weeks in lock-down, the overwhelming majority (95%) of travelers spent time looking for vacation inspiration when the pandemic hit.



# **#ZISEARCH ESCAPISM**

#### This is where travelers found their vacation inspiration:







flicking through old photos from previous vacations

While we will see heightened mindfulness about how, where and when we share our traveling experiences in a more restricted and evolving environment, the benefits we derive from exchanging stories, when it's been safe to travel, will fuel new trends in sharing and connecting across social media feeds. Think fab new takes on vintage vacay pics and seamless, innovative ways for travelers to share tips for their entire trips with interactive, shareable itineraries for their friends and families.

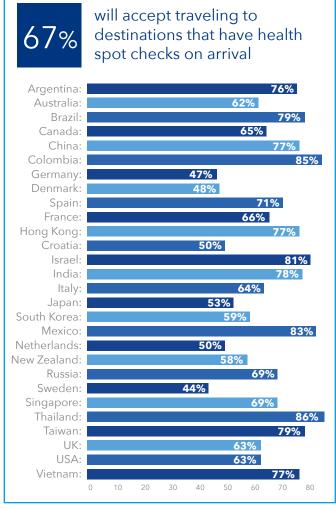




Global travelers (79%) will take more precautions due to Coronavirus and will look to the travel industry to help them gear up for this new normal. In general, women will be more cautious when it comes to health and safety standards than men (83% vs 75%). Governments, travel associations and providers will have to work cohesively to set consistent standards to help keep travelers safe, and with expectations heightened, some destinations and businesses will need to work harder to regain travelers' trust.

Short-term there will also be a change in transport preference and provisions, with almost half (46%) opting to avoid public transport for fear of contracting Coronavirus. This will cause a longer-term shift in how people will travel to and around their vacation destinations, with more people choosing to rent or drive their own car.

would consider a car rental for getting around a destination to avoid public transit



# #5 SAFETY **CLEANS UP**

Just as we have become accustomed to traveling without liquids in our carryon luggage and removing shoes to go through airport security, the 'new normal' will also see travelers prioritize and adhere to increased health and safety measures, with many becoming second nature sooner than we think, including:

> will favor accommodations that have antibacterial and sanitizing products

expect tourist attractions to adapt to allow for social distancing

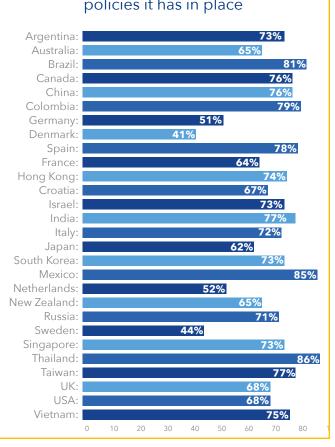
will accept wearing a mask in public.

of travelers will avoid certain destinations, rising to 67%\* for baby boomers

Quarantine measures will remain less popular with far fewer travelers willing to accept these in order to travel to a particular destination.



will book a particular accommodation if it's clear what health and hygiene policies it has in place









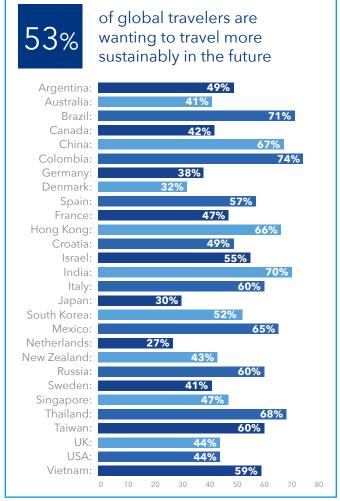
With over half (53%) of global travelers wanting to travel more sustainably in the future as Coronavirus has opened their eyes to humans' impact on the environment, expect to see a more eco-conscious mindset in 2021 and beyond.

More than two-thirds (69%) expect the travel industry to offer more sustainable travel options and travelers will consequently visit alternative destinations in a bid to avoid traveling during peak season (51%) and overcrowding (48%).

This desire also means that 63% will stay away from crowded tourist attractions, indicating that destinations will need to adapt new, smart crowd management measures to appease travelers visiting their country.

Additionally, the impact of Coronavirus has inspired people to not just be committed to protecting themselves, but also the places they visit.

will want to see how their money is going back into the local community, 46% would be encouraged to make more sustainable travel choices if there are attractive off-season travel packages offerings



### #6IMPACT AWAKENING



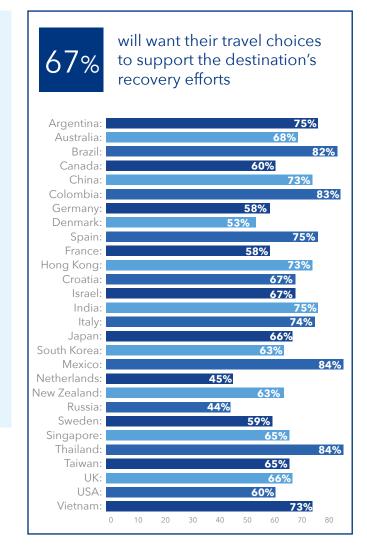
#### Travelers' expectations for sustainable travel in the future

state that they'd like an economic incentive (e.g. tax breaks) for travelers who opt for an eco-friendly trip in the future

want online travel booking sites giving reward points for making sustainable choices to use for free extra perks and discounts.

are looking to online travel booking sites to use clearer signposting so they can easily identify when something is (not) sustainable.

expect travel companies to offer tips on how to be more sustainable while traveling



believe that the industry must adapt to this sustainable mindset for the long-term by offering more attractive off-season travel packages



consider reducing waste and/or recycling their plastic when traveling once all travel restrictions are lifted



Working remotely has irreversibly entered the mainstream during the pandemic with the knock-on effect that people will look to take longer trips in the future that more effectively combine work and pleasure than ever before.

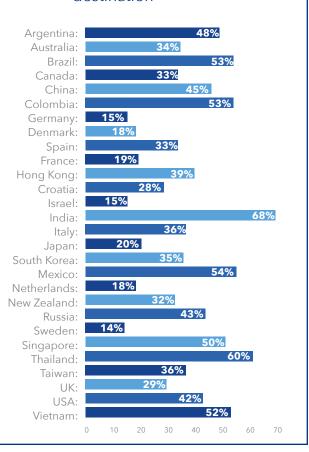
No longer confined to five days a week in an office and desperate for a change of scene from Working From Home (WFH), we'll see a significant rise in the "Workcation", with travelers looking to extend their vacation experience in new locales by staying an extra week or two to work remotely - or factoring holiday around a stint of remote working. Expect laptops to become even more of a mainstay in luggage than ever before, and an attractive spot on which to rest them a must-have when choosing where to stay.

52%

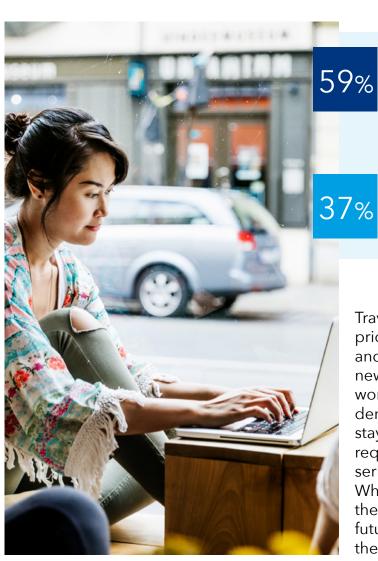
would take the opportunity to extend any business trips to also enjoy leisure time at the destination

37%

of travelers have already considered booking somewhere to stay in order to work from a different destination



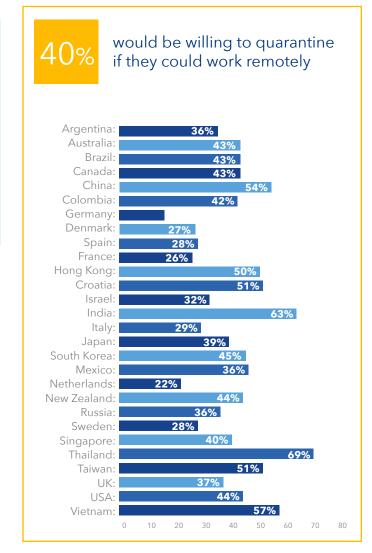
# **#7** BYE BYE 9 TO 5



agree that due to the increase in working from home and reliance on technology, business travel will be considered less essential than before

of travelers have already considered booking somewhere to stay in order to work from a different destination

Travel platforms and places to stay will prioritise showcasing home office facilities and Wi-Fi speed in an attempt to attract this new wave of digital nomads. Likewise, the world of corporate travel will see increasing demand for privacy, cleanliness and longer stays among those traveling for business, requiring alternative accommodations to seriously up their 'work-friendly' game. While companies will undoubtedly reassess their approach to business travel in the future, workers will continue to maximise the trips they do take.

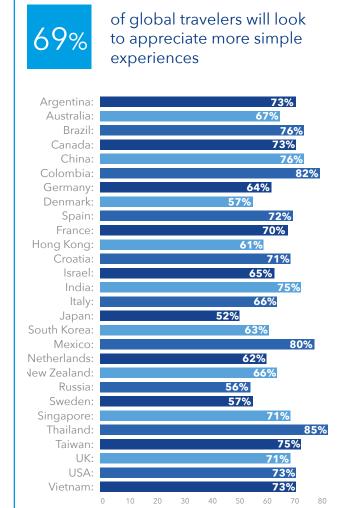




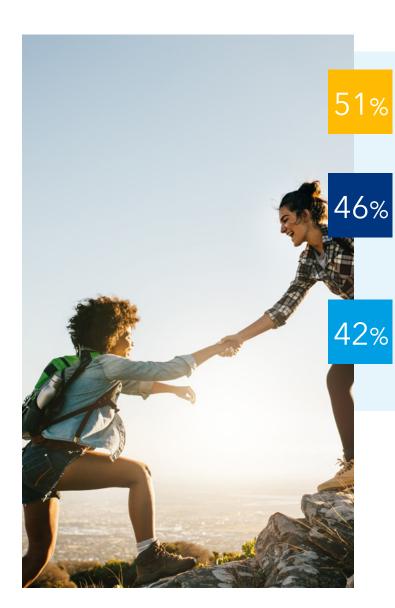
As we learn to live with the consequences of the pandemic in 2021 and beyond, travelers will be keen to embrace a new and stripped-back way of experiencing the world. So much time spent in our own homes with our loved ones has given birth to adjusted travel priorities and a desire to enjoy more of our natural resources.

Globally, the use of simple pleasure-related endorsements such as hiking (94%), clean air (50%), nature (44%) and relaxation (33%) on Booking.com has increased since the start of the pandemic\*\*\*, over two thirds of travelers (69%) will look to appreciate more simple experiences such as spending time outdoors or with the family while on vacation, and over half (56%) will seek out more rural, off-the-beaten-track experiences to immerse themselves into the outdoors.

Considering the renewed emphasis on privacy, sufficient space and personal control over cleanliness and hygiene, it is not surprising that we will see travelers look for accommodation 'closer to home'.



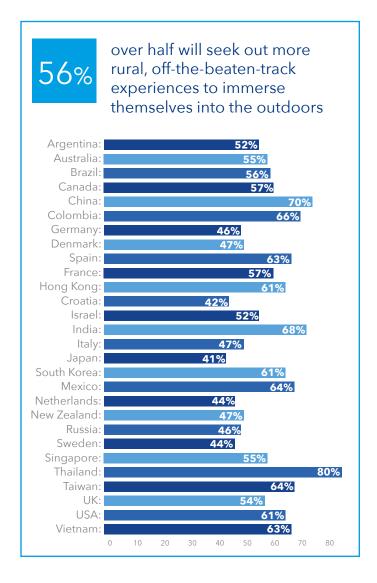
# **SIMPLE PLEASURES**



say a relaxing trip is their preferred type of trip, followed by beach breaks (40%) and city trips (29%)

will opt to eat in more as opposed to eating out at restaurants, so a well-equipped kitchen will be essential for any vacation rental in the future

prefer to stay in a vacation home or apartment rather than in a hotel. A contrast to 2019 when 64%\*\*\*\* of travelers favored staying in a hotel





Tech innovation will play a crucial role in rebuilding traveler confidence and we will see the accelerated use of tech to adapt to a new type of traveler.

Tech will help us regain the spontaneity, confidence and ease of times past while at the same time help people travel safely and responsibly.



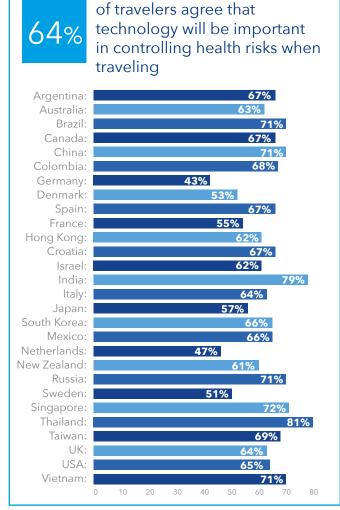
are excited about tech's potential to further personalize their travel experiences in the future



will want tech options to make lastminute reservations (56% of women agree with this statement vs 50% of men)



say that accommodations will need to use the latest technologies to make travelers feel safe



## #9 SPONTECHNAITY

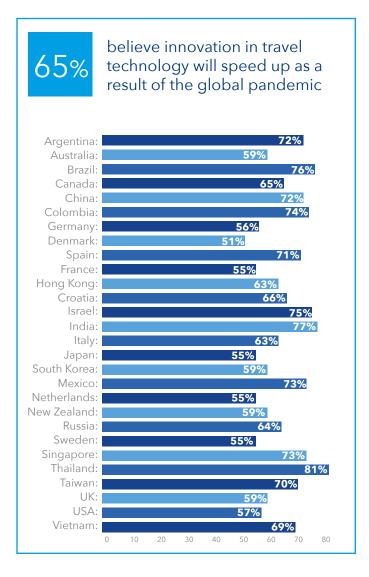
30%

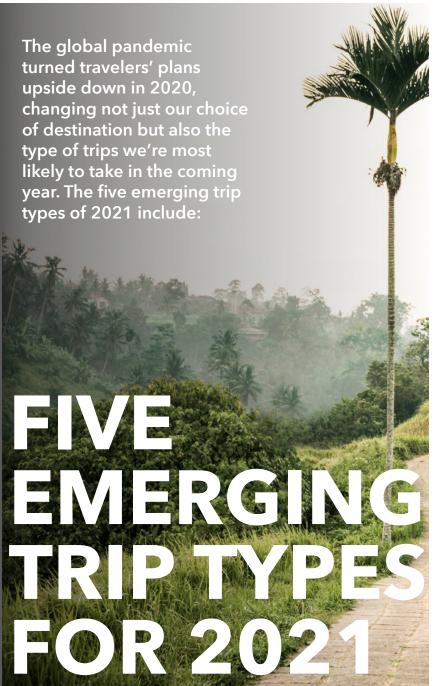
This reliance on technology will only continue to grow as tech proves its worth and becomes more and more ingrained into our travel experiences.

The innovations we'll see next will bring even more change, with enhanced online experiences influencing future travel behavior and planning:

> Over a third would feel more comfortable about going to an unknown destination if they could scout it out beforehand by using virtual reality (VR).

That being said, the real thing reigns supreme with only 30% expecting to participate in more virtual/online experiences run by tourist attractions, local tours and workshops, proving that while we trust technology implicitly to bring us more convenience, personalization and peace of mind, its prime role resides in being a conduit for, rather than a replacement (yet), for seeing it, feeling it and tasting it for yourself.







#### **Solace in Solo**

The solo travel trend is likely to gather even greater momentum as people's thirst to travel that was stymied by the pandemic will nudge them to take the plunge to travel on their own in the coming year. Booking.com data prepandemic saw 17%\*\*\*\* planning a trip on their own, while 30%\* now say they will be planning a solo trip in the future.



#### **Relaxury**

The unexpected halt to travel plans for many travelers has meant that now, just being able to get away and relax is a luxury. Whilst research shows that travelers still have a high intention to travel again, only 13%\* are now planning an all-out luxury experience, with the majority (51%)\* rather simply planning a relaxing trip to get away from it all.



#### **Breakaway Bubbles**

In 2020, most travelers have had extended time apart from friends and family, and for many it appears distance has made the heart grow fonder as 61%\* of travelers will use travel as an opportunity to reconnect with loved ones. In fact, whilst we have all been apart, 36%\* of travelers have revealed that talking to friends and family about travel recommendations is one of their main inspirations to travel again - perhaps to take a trip down memory lane and revisit a family favourite destination.



#### **Weekend Wonders**

With many travelers feeling apprehensive that future travel plans could be disrupted again, there will be an increased demand for a quick trip as **over half of travelers (53%\*) want to take more shorter breaks than they did in 2019** to minimise any disappointment. A further **28%\* also revealed their preference of a weekend break for their next trip**, showing travelers desires to be able to escape reality, even for just a few days.



#### **Food for Thought**

Travelers' desire to explore the world has not diminished but **traveling** abroad is still being avoided by a majority of travelers (53%\*) once travel restrictions are lifted. That is why local travel is the new way of exploring the world, with culinary delights being top of the list. And with taste buds at the ready, 36%\* of travelers are keen to taste and indulge in local cuisine while traveling, with 38%\* wanting to eat out more often with the money saved from not traveling abroad.

#### **Booking.com**

### **METHODOLOGY**

\*Research commissioned by Booking.com and conducted among a sample of adults who have traveled for business or leisure in the past 12 months and must be planning to travel in the next 12 months (if/once travel restrictions are lifted). In total 20,934 respondents across 28 countries were polled (including from 999 USA, 496 from Canada, 497 from Mexico, 997 from Colombia, 999 from Brazil, 499 from Argentina, 995 from Australia, 499 from New Zealand, 999 from Spain, 996 from Italy, 996 from France, 999 from UK, 996 from Germany, 498 from Netherlands, 499 from Denmark, 499 from Sweden, 498 from Croatia, 1001 from Russia, 498 from Israel, 997 from India, 994 from China, 499 from Hong Kong, 497 from Thailand, 496 from Singapore, 499 from Taiwan, 997 from South Korea, 500 from Vietnam and 995 from Japan). Respondents completed an online survey in July 2020.

\*\*Based on the share of filter users who used the "pet friendly" filter, comparing the average use of the filter across 2019.

\*\*\*Based on endorsements left on Booking.com as part of post-stay reviews. Insight based on endorsements that saw the biggest increase in monthly usage between 1st April 2020 and 11th September 2020, compared to the average monthly endorsements between January 2019 and February 2020.

\*\*\*\*Research commissioned by Booking.com and independently conducted among a sample of 50,688 respondents across 29 markets. In order to participate in this survey, respondents had to be 18 years of age or older, had to have travelled at least once in the past 12 months and be either the primary decision maker or involved in the decision making of their travel. The survey was taken online and took place in November 2019.



#### **About Booking.com:**

Founded in 1996 in Amsterdam, Booking.com has grown from a small Dutch startup to one of the world's leading digital travel companies. Part of Booking Holdings Inc. (NASDAQ: BKNG), Booking.com's mission is to make it easier for everyone to experience the world. By investing in the technology that helps take the friction out of travel, Booking.com seamlessly connects millions of travelers with memorable experiences, a range of transportation options and incredible places to stay - from homes to hotels and much more. As one of the world's largest travel marketplaces for both established brands and entrepreneurs of all sizes, Booking.com enables properties all over the world to reach a global audience and grow their businesses. Booking.com is available in 44 languages and offers more than 28 million total reported accommodation listings, including more than 6.7 million listings alone of homes, apartments and other unique places to stay. No matter where you want to go or what you want to do, Booking.com makes it easy and backs it all up with 24/7 customer support.







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