

2022 | Q2

Traveler Insights Report



Enthusiasm for Travel Endures

In our last quarterly report, we highlighted rising travel intent and opportunities to rebuild. While we saw rising inflation and prices, and continued operational and staffing challenges throughout the travel industry, people are finding ways to travel – and in many cases, are going further afield.

During Q2, we saw more than 50% year-over-year increase in traveler demand globally for long-haul flights. This trend, along with quarter-over-quarter share growth in the 61- to-90–day search window and higher hotel average daily rates, are just a few of the factors pointing to what we hope will be a strong second half of 2022. The sustained enthusiasm for travel further underscores the importance of making travel more accessible to all and creating the best traveler experience.

This report highlights the latest quarterly traveler insights, gathered from more than 70 petabytes of exclusive Expedia Group first-party data and custom research to help our partners and the industry rebuild and capture traveler demand. [Connect with us](#) any time on ways we can support your marketing strategy, and [subscribe to our blog](#) for more traveler marketing trends.

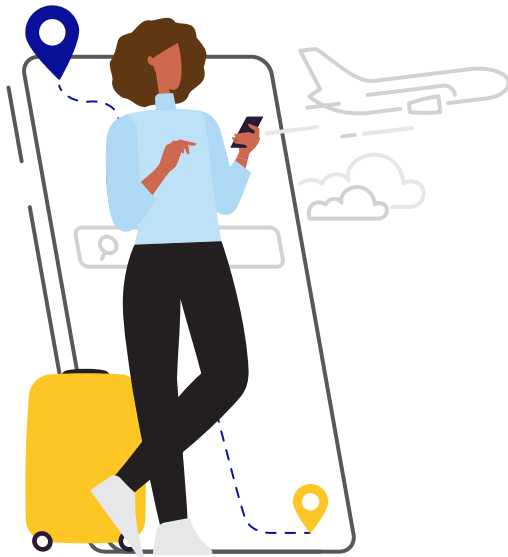


JENNIFER

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Global Vice President
Expedia Group Media Solutions

2022 | Q2 Snapshot



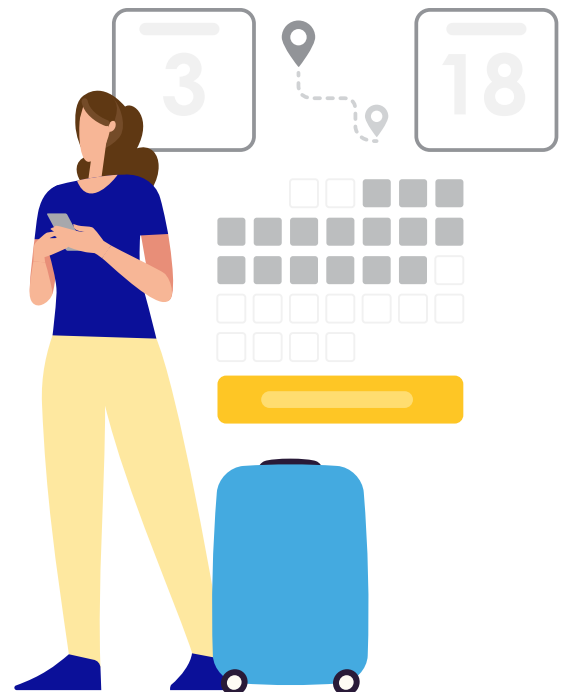
Travel Searches Hold Steady

Following a 25% quarter-over-quarter surge in searches globally between Q4 2021 and Q1 2022 across the Expedia Group branded sites, search volumes held steady in Q2, indicating sustained interest and enthusiasm to travel. APAC saw strong double-digit growth between Q1 and Q2, followed by EMEA.



Search Windows Still Shorter

Travelers are still largely looking at trips in the near term, as share of searches in the 0- to 90-day window increased more than 5% globally, and searches in the 61- to 90-day window saw the largest quarter-over-quarter lift at 15%.



2022 | Q2 Snapshot

Long-Haul Destinations Returning

Major cities and beach destinations around the world remained popular with travelers in Q2. On the global top 10 list of booked destinations in Q2, London took the No. 3 spot, and made the top 10 list of booked destinations by travelers across all regions. Paris entered the global top 10 list of booked destinations at No. 7, as well the top 10 booked destinations list by travelers from APAC, EMEA, and LATAM.



Demand Stays Strong Despite Rising Costs

Q2 continued the momentum from Q1 with strong growth, with lodging bookings at the highest in Expedia Group history. A prior-year comparison shows total gross bookings were up by double-digits, as travel demand further improved.

Growing Interest in Inclusive Travel

People around the world are increasingly seeking ways to have more meaningful and conscientious travel experiences, and looking for inclusive and accessible tourism. According to our recent [Inclusive Travel Insights Report](#), 7 in 10 consumers would choose a destination, lodging, or transportation option that is more inclusive of all types of travelers, even if it's more expensive.



Travel Searches Hold Steady

Following a 25% quarter-over-quarter surge in searches globally between Q4 2021 and Q1 2022, global search volume held steady in Q2 2022, indicating sustained interest and enthusiasm to travel. APAC saw strong double-digit growth between Q1 and Q2, with a 30% increase in searches from the region, followed by EMEA (10%).



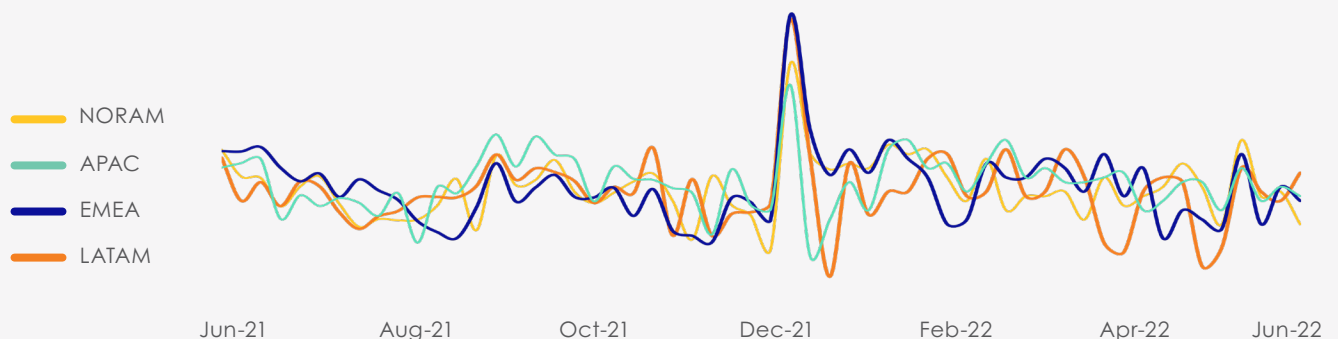
Global Search Trends

Week-over-week global search volume fluctuated throughout Q2, with the strongest gains during the week of June 6. Week-over-week searches globally increased 10% following the June 10 announcement that the U.S. would no longer require COVID-19



Q2 | 2022

Destinations Super-Regions | WoW Search % Change



Source: Expedia Group data, Q2 2021 - Q2 2022

testing for international travelers. The announcement also spurred a 10% increase in week-over-week searches from EMEA and NORAM, and a 5% increase from APAC and LATAM. Removing the testing requirement eliminated a point of friction for travelers, particularly American travelers, who may have been avoiding international travel due to re-entry concerns.

Domestic Searches

Domestic search performance fluctuated throughout Q2, with the strongest performance in week-over-week domestic search increases during the week of June 6, led by NORAM (10%). The start of summer in the Northern Hemisphere likely played a role in driving this trend, but the lifting of testing requirements for international travelers may have also bolstered overall travel confidence in NORAM.

International Searches

APAC saw consistent week-over-week international search growth from April 25 to June 27, with double-digit growth in May and June. Following the U.S. announcement that the COVID-19 testing requirement would be lifted for international air travelers, international searches globally increased double digits week-over-week during the week of June 13, led by LATAM.



Globally, week-over-week searches increased 10% following the June 10 announcement that the U.S. would no longer require covid testing for international travelers

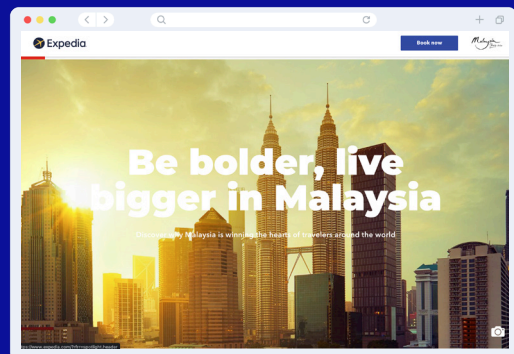
Following the U.S. announcement, searches to the U.S. from top destinations within APAC and EMEA, including the United Kingdom, Germany, France, Australia, and New Zealand, increased by double digits during the weeks of June 6 and June 13.



Campaign Spotlight

**TOURISM
MALAYSIA®**

Tourism Malaysia Reignites International Travel



As borders reopen, destinations are eager to reconnect with international travelers. That's why [Tourism Malaysia](#) partnered with our award-winning [creative team](#) to rebuild its reign as a top destination, particularly among travelers from Australia, the U.S., and the UK. The campaign's custom landing pages showcase Malaysia as a unique and diverse destination that inspires travelers to book that long-awaited vacation.

Search Windows Still Shorter

Seasonal holidays and a palpable desire to travel in the near term, coupled with economic and pandemic-related concerns and regional instability, contributed to growth in shorter search windows during Q2. Global share of searches in the 0- to 90-day window increased more than 5% quarter-over-quarter, with the 61- to 90-day window seeing the largest growth (15%). Globally, Q2 searches in the 91- to 180-day window decreased more than 20% quarter-over-quarter.

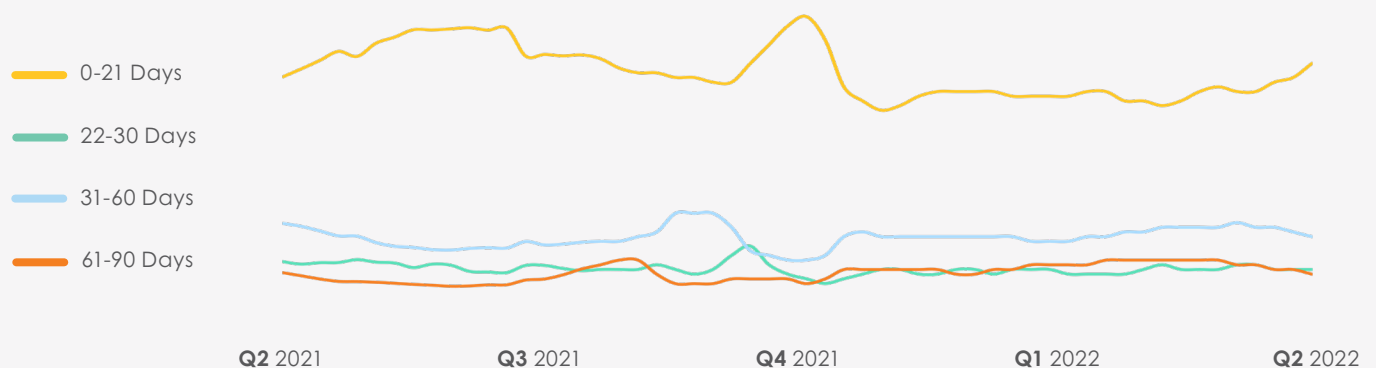


During Q1, we saw a significant increase in search volume for longer search windows globally, which may have been a result of travelers



2021-2022

Global Traveler Search Windows | Week over Week % Change

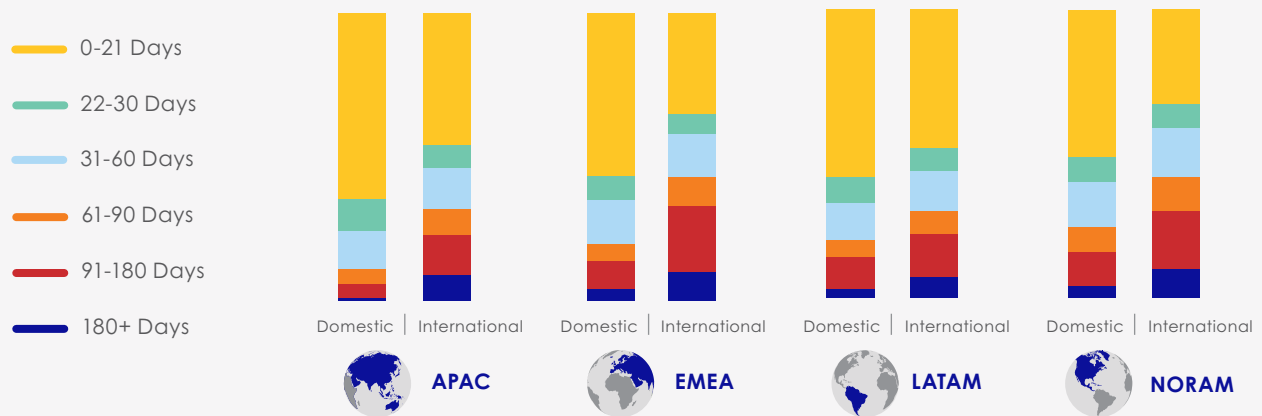


Source: Expedia Group data, Q2 2021-Q2 2022



Q2 | 2022

Super Region Search Window Domestic vs. International

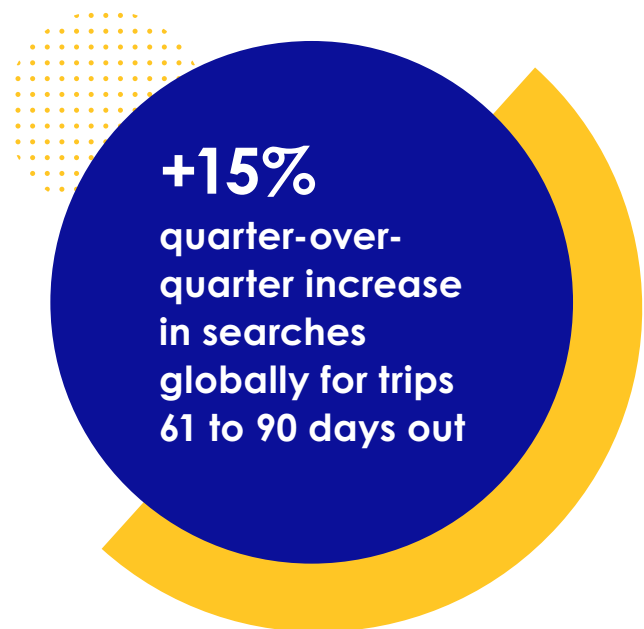


Source: Expedia Group data, Q2 2022

planning more than 90 days out for mid-year vacations. However, the decline in share volume for longer search windows during Q2 is driven by several factors. In the Northern Hemisphere, Q2 searches for spring or summer travel would naturally occur within the 90-day search window, resulting in an increase. Additionally, the shifting search window share could point to stabilization following the large increase in Q1 or may indicate that travelers are waiting to book further out in the hopes that fuel costs, and thus flight prices, will go down.

Insights from an April 2022 Expedia Group survey conducted by Wakefield Research found that in

the current environment, most consumers (53%) feel comfortable booking travel less than one month in advance. Among those with plans to travel in the next 12 months, they are comfortable booking within three months of their trip, on average, which aligns with the trends seen in our first-party data.



Regionally, EMEA and NORAM saw the strongest growth in the 0- to 90-day search window during Q2, at 10% (EMEA) and 5% (NORAM), driven in part by the spring and summer travel season in the Northern Hemisphere. In other regions, the 61- to 180-day search window saw strong gains quarter-over-quarter, with 30% growth in APAC and 20% growth in LATAM.

Domestic Search Window

In Q2, the majority of global domestic searches fell within the 0- to 30-day window, while the share of searches in the 91- to 180+ day window decreased quarter-over-quarter. EMEA saw a decrease in domestic searches in the 91+ day window, while the share of domestic searches in the 0- to 90-day

window increased double digits quarter-over-quarter. Regional instability in EMEA may have played a role in the search window share shift, thereby influencing travelers' desire to plan for nearer-term travel—domestic and international.

International Search Window

The continued easing of travel restrictions and testing requirements contributed to a double-digit quarter-over-quarter lift in international searches globally in the 0- to 90-day window, with the strongest growth in the 61- to 90-day window. This indicates that even though travelers are reverting to planning for the near term, they are still considering international trips.

On a regional level, international searches in the 0- to 90-day window increased in EMEA and in NORAM, again indicating spring and summer travel interest in the Northern Hemisphere. In APAC and LATAM, international search share for the 31- to 60-day window increased quarter-over-quarter.



Long-Haul Destinations Returning

As with prior quarters, major cities and beach destinations around the world remained popular with travelers in Q2, but London and Paris had particularly strong showings. On the global top 10 list of booked destinations in Q2, London took the No. 3 spot, and made the top 10 list of booked destinations across all regions. London was the No. 1 booked destination by travelers from APAC and EMEA and made new appearances on the top 10 lists for travelers from LATAM and NORAM.



Paris, one of the trending cities in our last quarterly report, entered the global top 10 list of booked destinations, at No. 7. The city was



Top 10 Booked Destinations | Q2 2022

*New Top 10 destination



For APAC Travelers

London
Tokyo
Singapore
Seoul
Honolulu
Paris*
New York
Sydney
Melbourne
Seogwipo (Jeju Island)



For EMEA Travelers

London
New York
Paris
Barcelona
Dubai
Istanbul
Amsterdam
Copenhagen
Stockholm
Rome



For LATAM Travelers

Mexico City
New York
Cancun
Paris
Sao Paulo
Madrid
Rio de Janeiro
London*
Las Vegas
Orlando*



For NORAM Travelers

New York
Las Vegas
Los Angeles
Orlando
Cancun
Chicago
London*
Boston*
Honolulu
San Francisco*

Source: Expedia Group data, Q2 2022

also in the top 10 list of booked destinations by travelers from APAC, EMEA, and LATAM. The destination's appearance on the top 10 list for LATAM travelers aligns with Q2 2019 bookings, indicating further recovery in the market.

Unlike prior quarters, new destinations did not appear on the top 10 list of booked destinations for every region. The top 10 booked destinations for EMEA travelers remained the same quarter-over-quarter, though there was movement across the rankings. New York moved from the No. 3 position to No. 2, Paris moved from No. 5 to No. 3, and Barcelona moved from No. 5 to No. 4.

For NORAM travelers, however, new destinations within the region appeared on the top 10 booked destinations list, including Boston and San Francisco. For LATAM travelers, new international destinations, including London and Orlando, made the top 10 list.

Trending Countries

Building on the positive gains seen throughout Q1, Canada continued to lead search increases in Q2, as both an origin country



**More than
100%**
year-over-year
increase in Q2
traveler demand
for flights from the
U.S. to Europe

and a destination country. Comparing June 2022 to April 2022, inter-province searches were up 10%, while searches from the U.S. to Canada increased 20% during the quarter. American searches further afield also increased, with searches from the U.S. to Italy increasing 10% in Q2.

Trending Cities

Globally, Chicago, Las Vegas, and San Diego saw the strongest growth in Q2 demand between April and June. Bangkok saw a significant increase in demand from APAC travelers between the same time period, while APAC traveler demand for Seoul and London also increased by double digits during the quarter.

Long-Haul Flight Demand Taking Off

One of the promising trends in Q2 is the significant increase in demand for long-haul flights (flights with a duration of 4+ hours), as travelers look to go further afield. During Q2, we saw more than a 50% year-over-year increase in global traveler demand for long-haul flights.

Further illustrating the rise in long-haul flights, Q2 delivered over 100% year-over-year growth in traveler demand for flights from the U.S. to Europe. London, Paris, and Rome account for the top 3 European destinations for U.S. travelers during Q2.



The Return of International Family Travel

During the pandemic, the proportion of families traveling internationally declined compared to other traveler groups. However, Q2 data shows that international family travel has recovered to pre-pandemic levels, and now accounts for the same proportion of travelers as in 2019, about 15%.

Looking specifically at the EMEA region, popular family destinations such as Antalya, Turkey, and Marrakech, Morocco, have seen a 5% increase in travelers between 2019 and 2022.

According to Q2 Vrbo data, families are 3x more likely to book a vacation rental than other traveler groups, and in turn, spend more per night than average. And with families spending 25% more per booking than other traveler groups across the Expedia Group points of sale globally (excluding Vrbo) in Q2, the return of family travel points to positive industry impact.

Demand Stays Strong Despite Rising Costs

Q2 continued the momentum from Q1 with strong growth, with lodging bookings at the highest in the company history. A prior-year comparison shows total gross bookings were up by double-digits, as travel demand further improved.

Lodging demand increased quarter-over-quarter in Q2, with APAC seeing the strongest growth. Q2 also saw a 40% increase in stayed room nights and a 9% increase in stayed average daily rates (ADRs).

Hotel Performance

Hotels had a strong showing in Q2, as indicated by a shift in hotel booking share, which saw double-digit gains quarter-over-quarter. With sustained demand globally, ADR in Q2 increased quarter-over-quarter and even more so compared to Q2 2019. Room night cancellation rates globally declined more than double digits compared to Q2 2019.

During Q2, 10 of the top 25 global destinations saw double-digit quarter-over-quarter growth in hotel demand. Seoul saw the highest



quarter-over-quarter growth, with strong performance in other APAC destinations like Tokyo, while Rome and Paris led in EMEA. Toronto moved up the list from the 29th position to 25th, Barcelona moved from 22nd to 13th, and Chicago moved from 11th to 6th.

Vacation Rental Performance

Domestic travel continued to drive the vacation rental category, with Australia, France, Brazil, and the U.S. maintaining their positions

as the top booked countries in their respective regions, consistent with the rankings seen in Q1.

U.S. maintaining their positions as the top booked countries in their respective regions, consistent with the rankings seen in Q1.

Beach and warm weather destinations maintained their presence on the list of top destinations for vacation rental bookers, though some new entrants, including major cities, made the list. London broke into the top 10 Vrbo-booked destinations list in Q2, claiming the No. 6 position for APAC travelers and the No. 7 position for EMEA travelers.

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Top 10 Vrbo-Booked Destinations | Q2 2022

*New Top 10 destination



For APAC Travelers

Surfers Paradise, Australia
Queenstown, New Zealand*
Dunsborough, Australia
Cowes, Australia
Port Douglas, Australia
London, England*
Noosa Heads, Australia
Jindabyne, Australia
Bright, Australia*
Margaret River, Australia*



For EMEA Travelers

Kissimmee, Florida
Paris, France
Nice, France
Antibes, France
Davenport, Florida
Cannes, France*
London, England*
Arcachon, France
Porto-Vecchio, France
Albufeira, Portugal



For LATAM Travelers

Rio de Janeiro, Brazil
Ubatuba, Brazil
Kissimmee, Florida
Campos do Jordão, Brazil*
Fortaleza, Brazil*
Bertioga, Brazil
Praia Grande, Brazil
Guarujá, Brazil
Natal, Brazil*
Cabo Frio, Brazil



For NORAM Travelers

Panama City Beach, Florida
Gulf Shores, Alabama
Kissimmee, Florida
Orange Beach, Alabama
Destin, Florida
Myrtle Beach, South Carolina
Lahaina, Hawaii
Kihei, Hawaii
Hilton Head Island, South Carolina
Miramar Beach, Florida

Source: Expedia Group data, Q2 2022

Flight Performance

Strong demand, rising fuel costs, and an increase in longer-distance flights booked drove a quarter-over-quarter increase in the global average ticket price during Q2. Compared to Q2 2019, the global average ticket price was up double-digits in Q2 2022, led by EMEA and APAC.

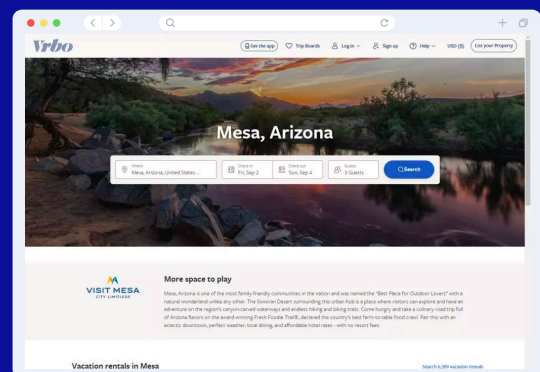


Campaign Spotlight

VISIT MESA
CITY LIMITLESS™

Vrbo Campaign Inspires Travelers to Visit Mesa

Since the early days of the pandemic, we've seen a growing rise in car travel that hasn't waned, even as the world reopens. [Visit Mesa](#) wanted to target this road trip audience by leveraging the brand recognition of Vrbo, an Expedia Group brand. The destination marketing organization partnered with Media Solutions to [target travel shoppers](#)



searching not only in Mesa, but also in neighboring Arizona destinations. In the end, the award-winning campaign helped generate an average length of stay of 8.5 nights.

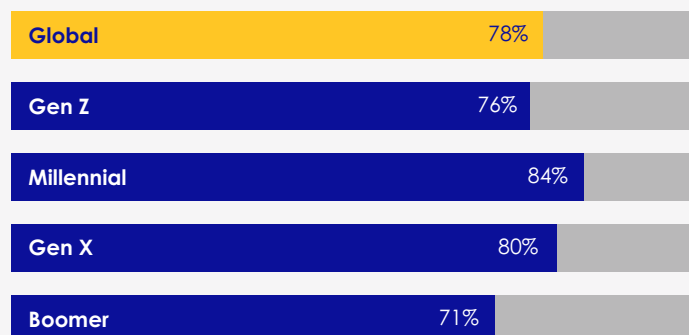
Growing Interest in Inclusive Travel

People around the world are increasingly seeking ways to have more meaningful and conscientious travel experiences, including sustainable travel, and inclusive and accessible tourism. According to our recent [Inclusive Travel Insights Report](#), 92% of consumers think it is important for travel providers to meet the accessibility needs of all travelers, yet only half of consumers have seen options that are accessible to all abilities when they are searching for and booking a trip. Furthermore, just 52% of consumers said they have seen options that are inclusive of all types of travelers.



Have you ever made travel choices based on promotions or advertisements that you felt represented you through messaging or visuals?

A: Yes



Source: Expedia Group Media Solutions | Inclusive Travel: Understanding Traveler Values & Opportunities for Marketers

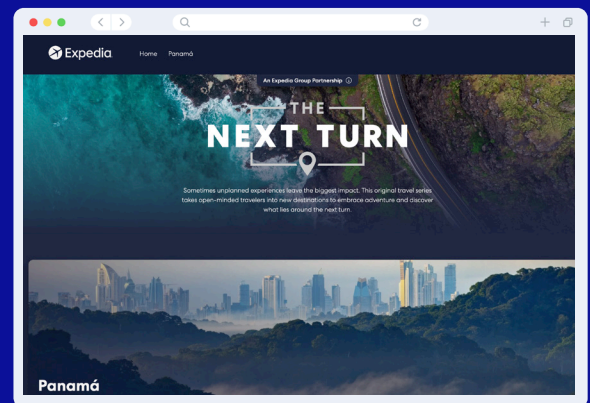
Like their desire to see authentic commitments to [sustainable tourism](#), consumers are also paying attention to a travel brand's commitment to inclusion, diversity, and accessibility, and these commitments are influencing purchasing decisions. In fact, 78% of consumers said they have made a travel choice based on promotions or ads that they felt represented them through messaging or visuals, while 7 in 10 consumers would choose a destination, lodging, or transportation option that is more inclusive of all types of travelers, even if it's more expensive.

When it comes to supporting local culture and communities within a destination, consumers are also looking for more information and options. Six in 10 consumers are interested in learning more about travel options that support local cultures and communities, and nearly two-thirds of consumers would choose a travel option that supports local cultures and communities, even if it was more expensive.

These insights, along with others highlighted in the report, point to the gap in accessible and inclusive options in the travel marketplace, as well as the opportunities travel brands have to improve offerings and make travel accessible to all travelers, everywhere.

Campaign Spotlight

Visit Panamá Demonstrates Inclusion



One destination marketing organization that succeeds in inclusive marketing is [Visit Panamá](#), which partnered with our award-winning Creative Partnerships team to develop a [campaign that represents all travelers](#). It features a new video series called "[The Next Turn](#)" that connects inspiration, planning, and booking to offer a shoppable travel experience. One episode features Amar, a blind traveler, who experiences a rainforest, volcano hike, and coffee farm in Panamá through his sense of hearing, smell, taste, and touch. This campaign showcases how travelers with different abilities can immerse themselves in the amazing experiences Panamá offers.



Looking Forward

Insights from an April 2022 Expedia Group survey conducted by Wakefield Research show that 76% of consumers plan to take a leisure trip in the next 12 months, or as many as 84% of Gen Z consumers and 81% of Millennials. On average, consumers will take three trips during that 12-month period. This data points to consumers' sustained eagerness to get away, and is a trend we'll monitor closely as we move into the back half of the year.

Rising Demand for Adventure Destinations

With travelers becoming more confident in going further afield, we're also seeing a rise in demand for single travelers going to adventure destinations. Q2 2022 data shows a 15% increase in demand for single adults traveling from the U.S. and EMEA to APAC, compared to Q2 2019. Key adventure destinations within APAC, including Thailand, Japan, and Vietnam, attract a greater proportion of single travelers than other traveler groups, accounting for 10 to 15% of all travelers.

The Expedia Group survey also found that the top reasons for upcoming travel during the next 12 months included exploring a new location (32%) and trying new experiences (25%). Gen Z

and Millennials are more likely than Gen X and Baby Boomers to travel for these reasons.

As summer continues in the Northern Hemisphere, with spring on the horizon in the Southern Hemisphere, we'll be watching to see how these adventure trends may carry over to Q3 and beyond.

Maintaining Our Commitment to Sustainability

As highlighted in our [recent study](#), sustainable tourism is of growing importance to consumers, and continues to be top of mind across the industry. According to our findings, 90% of consumers look for sustainable options when traveling, though 70% feel overwhelmed by starting the process of being a more sustainable traveler. As destinations and travel providers increase their focus on sustainability, there are growing opportunities to connect with travelers who are seeking information and guidance on how to make more responsible travel choices, as well as authentic brand commitments.

Innovating to Create the Best Traveler Experience

Despite economic instability and ongoing headwinds in the travel sector, consumers around the world are prioritizing travel and finding the options that work best for them. At Expedia Group, we remain focused on driving innovation to make travel accessible and creating the best traveler experience. This includes developing products and features that provide travelers with information when they need it, like price tracking and predictions. There's also Trip Boards, [available now on Vrbo](#) and launching soon on Expedia.com, which serve as a home base for all things trip-related, enabling travelers to save and book items, and simplifying collaboration with travel companions.

As for us at Expedia Group Media Solutions, we're also innovating to help empower our partners to inspire and convert travel shoppers. This includes the aforementioned "[Next Turn](#)" shoppable videos and other bespoke creative offerings, highly targeted and customizable sponsored listings, and new solutions like [Accelerator](#), which hotel partners can use to boost visibility.

We are continuously working to find new ways to connect marketers with the hundreds of millions of travelers who shop across Expedia Group brands, and to support the continued rebuilding and renewal of the industry.



**Ready
to get
started?**

For more specifics on our traveler data and insights, and how we can help you capture demand, reach out to your Expedia Group Media Solutions representative or [Contact Us](#) on our website.



Expedia Group Media Solutions is a global travel advertising platform that connects marketers with hundreds of millions of travelers across the Expedia Group brands. With our exclusive access to 70+ petabytes of Expedia Group traveler search and booking data, we offer advertisers actionable insights, sophisticated targeting, and full-funnel results reporting. Our suite of solutions includes display, sponsored listings, audience extension, co-op campaigns, and custom creative campaigns – all designed for our branded sites globally to add value to our travel shoppers and deliver on the objectives of our advertising partners. We bring more than 20 years of travel and media experience to help our advertising partners inspire, engage, and convert travelers for meaningful results.

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