



2023 | Q2

Traveler Insights



Traveler confidence continues to grow

Traveler behavior around searching, planning, and booking travel continues to fluctuate from seasonality trends, shifting consumer sentiment, border openings, and numerous other factors. Each quarter, we share insights into ever-changing traveler intent and demand based on 70 petabytes of our first-party data from hundreds of millions of travelers visiting our travel websites around the world. These insights, which include our latest custom research, are intended to help inform you on how to best understand and reach today's travelers.

In Q4 2022, we saw promising signals pointing to increased traveler optimism and resilience. As we look at the first quarter of 2023, our research and data show that traveler enthusiasm continues to grow. Ever since China fully lifted pandemic restrictions in early Q1, we saw notable growth in international search demand for Asia Pacific (APAC), a positive sign for international tourism to the region.

Searches increase globally

Globally, traveler searches on our Expedia Group sites increased 25% quarter-over-quarter (QoQ), and Europe, the Middle East, and Africa (EMEA) searches grew by 30%, indicating that traveler intent remains strong into 2023.

A year-over-year (YoY) view shows that Q1 searches globally increased by 10%, and APAC saw a notable 65% YoY increase.

We broke that down given the interest in APAC travel returning. During the week of January 9, there was nearly a 10% week-over-week (WoW) increase in global international search demand for China after pandemic restrictions lifted in the country on January 8, led by searches from APAC (15% WoW increase) and EMEA (10% WoW increase).

Between January 2023 and March 2023, travel searches from the U.S. to APAC destinations grew significantly following the easing of restrictions in the region, including:

↗ 75%

increase in searches
from the U.S. to Hong Kong

↗ 50%

increase in searches
from the U.S. to Taiwan

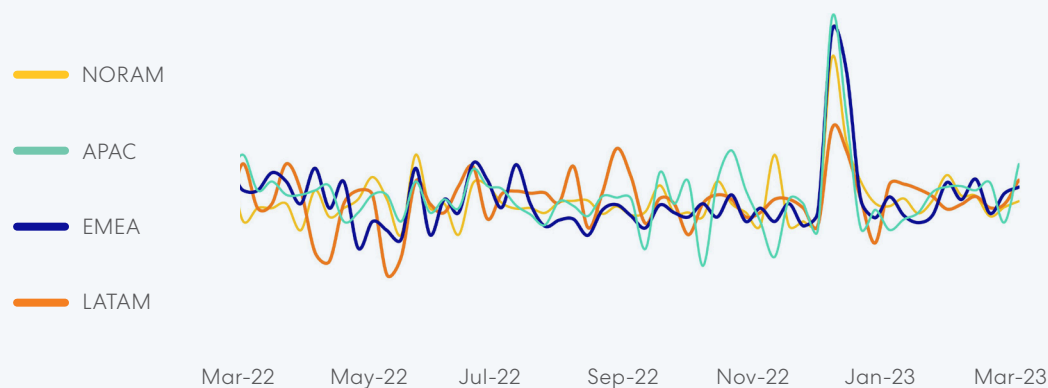
↗ 35%

increase in searches
from the U.S. to China



Q1 | 2023

Destinations super-regions | WoW search % change



Source: Expedia Group data, Q1 2022 - Q1 2023



Travelers continue to plan further ahead

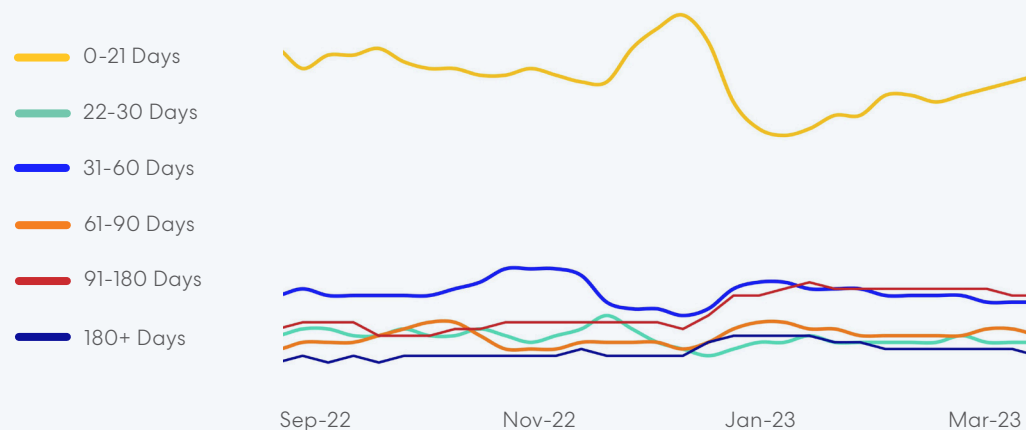
Search windows have continued to lengthen in recent quarters as travelers are planning for trips further out. The 180+ day search window increased by 30% QoQ, driven by 75% growth in both APAC and Latin America (LATAM). LATAM and APAC also saw strong growth in the 180+ day window for domestic and international searches, both up by more than 100% and nearly 40% QoQ, respectively.

Globally, the 91- to 180-day search window saw the strongest growth, with a 60% increase QoQ, led by EMEA then North America (NORAM), with 90% and 45% QoQ increases, respectively. EMEA saw the greatest increase in the 91- to 180-day search window for both domestic and international searches, up by over 100% and nearly 70% QoQ, respectively.



2022-2023

Global traveler search windows | WoW % Change



Source: Expedia Group data, Q3 2022-Q1 2023

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Mid-year getaways maintain momentum

In our last report, we shared a notable YoY increase in Q4 2022 traveler searches for mid-year 2023 travel from June to September (up nearly 70%), highlighting both strong traveler intent and longer-lead planning. This trend continued into Q1 2023, with a 50% YoY increase in search demand for mid-year travel, driven by APAC and EMEA, up more than 120% and 40% YoY, respectively.

Warm weather destinations are top of mind for consumers searching for mid-year getaways, with Cancun, Palma de Mallorca, Denpasar, and Barcelona on the list of top searched destinations for travel from June to September 2023.

Similarly, many consumers are looking to relax by the water, but that doesn't always mean at the beach. Q1 data shows that Expedia's "pool" filter is the top amenities search filter in EMEA and

the second most used amenities filter in NORAM, APAC, and LATAM. We know that booking accommodations with a pool is also a top priority for U.S. travelers who want to take a [Thirst Trip](#) ahead of summer. With this in mind, hotel and vacation rental partners should prominently highlight pool and waterpark amenities in listings to attract sun-seekers in the coming months.

Further indicating that U.S. travelers are eagerly anticipating mid-year travel, according to the recent [Expedia Summer Travel Forecast](#), flight searches are up 25% overall for June through August YoY, and interest in international destinations across Europe and Asia is up by triple digits.

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Beach getaways and city breaks remain popular

Major cities and beach destinations made the global top 10 list of booked destinations in Q1, as New York City, Las Vegas, and London held on to the top spots, while Paris moved from #8 to #5 and Honolulu joined the ranks at #9.

For APAC travelers, cities such as Osaka, London, Paris, and Taipei moved up the rankings, while newcomer Honolulu joined the list. The top-booked destinations for EMEA travelers saw quite a bit of movement compared to the prior quarter, with Tokyo and Berlin joining the top 10, while Amsterdam, Barcelona, and Rome all moved up in the rankings. Paris, Madrid, and Playa del Carmen moved up the top 10 list for LATAM travelers, and Punta Cana and Paris were newcomers on the list for NORAM travelers.



Top 10 booked destinations | Q1 2023

*New top 10 destination



For APAC travelers

Tokyo
Osaka
Seoul
London
Singapore
Bangkok
Paris
Taipei
Honolulu*
Sydney



For EMEA travelers

London
New York
Paris
Dubai
Amsterdam
Barcelona
Rome
Tokyo*
Copenhagen
Berlin*



For LATAM travelers

Mexico City
Cancun
New York
São Paulo
Paris
Madrid
Rio de Janeiro
Las Vegas
Playa del Carmen
Orlando



For NORAM travelers

New York
Las Vegas
Orlando
Cancun
Los Angeles
London
Punta Cana*
Chicago
Paris*
Honolulu

Source: Expedia Group data, Q1 2023

New York City, Las Vegas, and London held on to the top spots, while Paris moved from No. 8 to No. 5 and Honolulu joined the ranks at No. 9.



Vacation rental destination trends

Domestic travel continues to drive the vacation rental category, though in Q1, travelers ventured to new inter-regional destinations by the water. Travelers from NORAM continued to seek out warm weather getaways in Q1, with several new hot spots appearing on the list of top-booked Vrbo destinations, including Orange Beach, Destin, Miramar Beach, Hilton Head, and Myrtle Beach. For APAC travelers, several mountainside towns and beach destinations in Australia, including Bright, Port Douglas, and Jindabyne, joined the top 10 list. At the same time, Porto-Vecchio secured the #5 spot as a newcomer on the list for EMEA travelers, along with Rome at #9. Maceió was the only new Vrbo booked destination to make the list for LATAM travelers in Q1, though we saw many shifts among the existing top 10.



Top 10 Vrbo-booked destinations | Q1 2023

*New Top 10 destination



For APAC travelers

Surfers Paradise, Australia
Dunsborough, Australia
Queenstown, New Zealand
Cowes, Australia
London, England
Paris, France
Bright, Australia*
Rye, Australia
Port Douglas, Australia*
Jindabyne, Australia*



For LATAM travelers

Praia Grande, Brazil
Cabo Frio, Brazil
Ubatuba, Brazil
Guarujá, Brazil
Rio de Janeiro, Brazil
Bertioga, Brazil
Kissimmee, Florida
São Sebastião, Brazil
Arraial do Cabo, Brazil
Maceió, Brazil*



For EMEA travelers

Paris, France
Albufeira, Portugal
Kissimmee, Florida
Playa Blanca, Spain
Porto-Vecchio, France*
London, England
Nice, France
Cuxhaven, Germany
Rome, Italy*
Gérardmer, France



For NORAM travelers

Panama City Beach, Florida
Gulf Shores, Alabama
Kissimmee, Florida
Orange Beach, Alabama*
Destin, Florida*
Hilton Head, South Carolina*
Myrtle Beach, South Carolina*
Sevierville, Tennessee
Lahaina, Hawaii
Miramar Beach, Florida*

Source: Expedia Group data, Q1 2023



Consumers eager to travel and make up for lost opportunities

With global search volume up both QoQ and YoY, and travelers continuing to plan trips further out, it's clear that appetite for travel remains strong, particularly since many are eager to make up for lost opportunities over the past few years.

Insights from our March 2023 consumer survey with Wakefield Research further validate this sentiment, as 72% of travelers are planning to travel for leisure more this year to make up for lost travel opportunities over the last few years. More than 8 in 10 consumers (83%) are planning to travel more or the same amount as they did last year, and 81% plan to spend more or keep their budgets the same for a single trip, compared to last year. As we saw [earlier this year with U.S. travelers](#), many consumers are also seeking rest and rejuvenation, with 62% saying they plan to travel in the next 12 months to relax and disconnect.

Travel reward members are taking even more frequent trips this year, with 95% planning to travel for leisure in the next 12 months, making them a very valuable segment. When it comes to joining these programs, more than three-quarters (77%) of consumers are interested in travel rewards that they can apply to any individual element of their trip, such as their flight or hotel, regardless of brand. Additionally, 65% of consumers look for price discounts when considering whether to join a travel rewards program.

With consumers moving full speed ahead on travel plans, travel providers and brands have opportunities to spotlight the experiences and loyalty opportunities you offer travelers — such as amenities, activities, and other features that allow them to unwind — to capture this pent-up demand.

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