

# 2023 TRAVELER VALUE INDEX

## KEY INSIGHTS

As we emerge from the COVID-19 pandemic into an ever-changing travel landscape, this research looks to determine **what will prove a passing trend and what's here to stay.**



The Traveler Value Index includes:

**11,000**  
Consumers

**1,100**  
Industry professionals

**11**  
Major markets

Australia, Brazil, Canada, France, Germany, Japan, Mexico, South Africa, South Korea, the United Kingdom, and the United States



### Concerns over health and cleanliness recede

When booking travel, consumers prioritize:

**37%**  
Lowest price

**35%**  
Minimizing COVID-19 exposure

**57%**  
Experience being worth the cost

**51%**  
Cleanliness and safety



### Business and international travel are coming back



**1 in 3**

consumers say they're planning upcoming business travel.



**1 in 2**

consumers are likely to travel internationally in the next 12 months or already have a trip booked, compared to only 12% in mid-2020.



### Price sensitivity weighs heavily on decision-making

Consumers **51%**

Industry professionals **23%**

**One in two consumers (51%)** say inflation will impact their travel plans over the next 12 months.

By contrast, industry professionals underestimate price sensitivity among consumers, with only **23% saying inflation** will have the most negative impact.

### Consumers' top priorities when booking travel:

- 1 Atypical, low pricing
- 2 Ability to get a full refund
- 3 Flexible cancellation policies

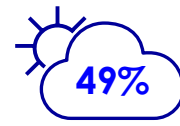
**46%**

of consumers say travel is more important to them now than it was pre-pandemic.

### Top motivators in travel decisions:



**49%**  
Physical and mental health



**49%**  
Change of scenery



**46%**  
Making up for lost time

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# DESTINATION MARKETING ORGANIZATION HIGHLIGHTS



## TOP TAKEAWAYS



### Return of “bleisure”

- **76% of business travelers** plan to extend their work trip for leisure purposes, while **28% of consumers** plan to take a “flexcation” trip in the next 12 months.
- Make sure you are reaching these travelers by showcasing your destination as a prime location for extending a business trip or working remotely.



### Driving destination decisions

- Drivable destinations are the most popular choice for consumers' next leisure trip in most countries. People in Brazil and South Africa prefer experiences, tours, or activities for their next leisure trip.



### Social inspiration on where to go

- Friends and family (52%) and travel providers (44%) are the most popular sources of destination inspiration, but **social media (35%)** is a close third, beating out more traditional outlets.
- **Gen Z (53%) and millennials (48%)** are particularly influenced by social media, ranking it the #1 and #2 most popular sources of travel inspiration, respectively.
- Streaming is also a new source of inspiration that is expected to grow in the coming year.<sup>2</sup>

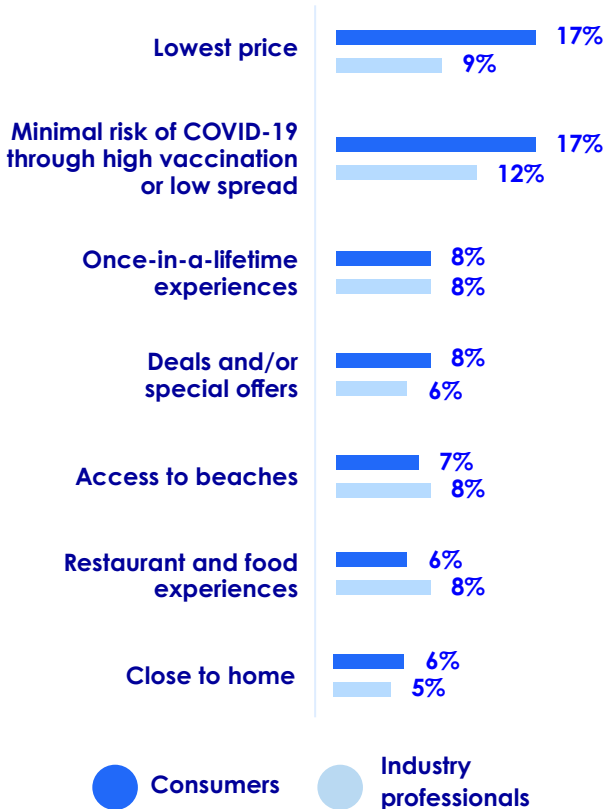


### Spotlight your destination values

- Our research shows that **90% of consumers** are looking for sustainable travel options and that most consumers would pay more for inclusive travel options.<sup>3</sup>
- Focus on highlighting your brand's values as a central part of your marketing and promotional efforts to connect with consumers.



## What do people value most when booking a trip in today's environment<sup>1</sup>?



<sup>1</sup>This graph reflects the top preferences for consumers (out of the total of 14 options).

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