The State of Travel & Hospitality
How consumers are reshaping the travel and hospitality industries in the wake of the COVID-19 pandemic
New COVID-19 variants shook the industry’s slow but steady path to recovery in 2021. Now, with omicron in the rearview mirror and confirmed cases falling in most key regions, travel and hospitality brands can look forward to a bustling 2022.

Morning Consult’s quarterly report, The State of Travel & Hospitality, tracks evolving consumer trends in the travel & hospitality sector and what they mean for the future of the industry.

Based on survey interviews with more than 11,000 adults across the Americas, Europe and the Asia-Pacific region, this report provides insight into how consumers are thinking about, planning and engaging in travel amid the ongoing pandemic.

This report also provides leaders in the travel & hospitality space with the most recent insights on air travel and transportation, hotels and accommodations, and the blurring of the lines between business and leisure travel, all informed by the same consumer research.

Survey conducted Feb. 16-17, 2022, among a representative sample of 2,200 U.S. adults, with an unweighted margin of error of +/- 2 percentage points.

### U.S. adults predict they will next travel for leisure...

<table>
<thead>
<tr>
<th>Travel Timeframe</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within 1 month</td>
<td>11%</td>
</tr>
<tr>
<td>In 1-3 months</td>
<td>22%</td>
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<td>In 4-6 months</td>
<td>22%</td>
</tr>
<tr>
<td>In 7-12 months</td>
<td>13%</td>
</tr>
<tr>
<td>In more than a year</td>
<td>19%</td>
</tr>
<tr>
<td>Never</td>
<td>12%</td>
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</table>
KEY TAKEAWAYS

1. Travel is rebounding (again) after holiday disruptions.
   The omicron surge took more of a logistical than an existential toll on travel. With the wave now passed, travelers are looking forward to more trips in 2022, which promises to be a better year for the industry than 2021.

2. Air travel continues to face challenges.
   The first months of the year are typically slow for air travel, but the inverse relationship between air travel and road trips reveals that travelers will continue to trade the sky for the car where possible.

3. Unique traveler needs drive accommodation preferences.
   Chain hotels are still the top-ranked accommodation, but vacation rentals and boutique hotels stand to experience some market share growth, driven by the preferences of high earners and millennials.

4. “Blended” is the new “business.”
   Traditional business trips have still not returned in earnest, and the appetite for business travel appears to be waning. In its place, travelers are blending leisure and business travel, revealing new opportunities and needs that brands must address.
WHAT THE TRAVEL INDUSTRY’S “RETURN TO NORMAL” LOOKS LIKE

High-frequency weekly data shows how consumers’ relationships with travel continue to evolve
The rapidly transmissible omicron variant delayed the travel industry's hopes for a full holiday recovery. Travelers' confidence was shaken, and mandatory quarantines left providers short-staffed during a crucial period. But the share of those who plan to travel is still above what it was during the same period in 2021, and now that the omicron wave has crested, travel brands can expect volume to grow into the warmer months.

One exception continues to be international travel, which lags domestic due to a combination of health concerns and logistical uncertainties.

Weekly surveys conducted among representative samples of roughly 2,200 U.S. adults, with unweighted margins of error of +/- 2 percentage points.
Traveler comfort levels dipped as COVID-19 cases peaked across the country in mid-January. Since then, though, comfort has returned to pre-omicron levels and, in many areas, is approaching or even reaching pandemic-era highs.

However, comfort continues to vary widely by type of travel. As has been the case throughout the pandemic, travelers are more comfortable with self-contained transport than shared, and with domestic rather than international travel.

Weekly surveys conducted among representative samples of roughly 2,200 U.S. adults, with unweighted margins of error of +/- 2 percentage points.
HIGH EARNERS, PREVIOUS TRAVELERS CONTINUE TO REPORT HIGHER COMFORT LEVELS

While comfort levels across all groups of travelers have risen throughout 2021, two groups have consistently been more comfortable with traveling: high earners and previous travelers.

One exception: Prior trip experience didn’t insulate travelers from concern during the height of the omicron wave. But comfort has since rebounded and remains at a higher level compared with other segments.

Weekly surveys conducted among representative samples of roughly 2,200 U.S. adults, with unweighted margins of error of +/- 2 percentage points.
When considering domestic travel, there are several factors that make people **significantly less likely to travel** than in non-pandemic times.

Early in the pandemic, many were deterred by concerns about their own health and potential exposure to COVID-19, but given the broad availability of vaccines and boosters, these concerns have been usurped by worries about others – from loved ones to society as a whole.

Notably, **all factors dropped in resonance** between January and February, reflecting a greater openness to travel as the omicron wave recedes.

## TRAVEL CONCERNS ARE MORE RELATED TO IMPACT ON OTHERS THAN PERSONAL HEALTH

<table>
<thead>
<tr>
<th>Factor</th>
<th>Share of respondents (%)</th>
<th>Change from Jan.</th>
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<tbody>
<tr>
<td>Concern about others’ behavior</td>
<td>51%</td>
<td>- 3</td>
</tr>
<tr>
<td>My loved one's health/safety</td>
<td>48%</td>
<td>- 7</td>
</tr>
<tr>
<td>Concern about how COVID-19 is affecting society</td>
<td>47%</td>
<td>- 6</td>
</tr>
<tr>
<td>My health/safety</td>
<td>47%</td>
<td>- 4</td>
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<tr>
<td>COVID-19 quarantine requirements</td>
<td>46%</td>
<td>- 5</td>
</tr>
<tr>
<td>Concern about giving COVID-19 to strangers</td>
<td>42%</td>
<td>- 7</td>
</tr>
<tr>
<td>COVID-19 testing requirements</td>
<td>39%</td>
<td>- 7</td>
</tr>
<tr>
<td>My financial situation</td>
<td>37%</td>
<td>- 5</td>
</tr>
<tr>
<td>My work's expectations for reporting in-person</td>
<td>29%</td>
<td>- 4</td>
</tr>
</tbody>
</table>

**Monthly surveys conducted Jan. 19 and Feb. 17, 2022, among representative samples of roughly 2,200 U.S. adults, with unweighted margins of error of +/- 2 percentage points.**
More than half of U.S. adults say they will travel for leisure within the next six months — up 6 percentage points between January and February — but intent to travel varies across demographics.

Younger generations are more likely to have plans to travel in the near future, as are high-income consumers.

The biggest differences in intent and timeline are connected to how frequently a person traveled before the pandemic. Those who traveled three or more times in a typical pre-pandemic year (who are likely to be millennials and high-income consumers) are also the most likely to be planning a trip soon.

Survey conducted Feb. 16-17, 2022, among a representative sample of 2,200 U.S. adults, with an unweighted margin of error of +/- 2 percentage points. Figures may not add up to 100% due to rounding.
While holiday travel was largely about time spent with family and friends, the new year brings new travel motivators. Connection with loved ones is still a key driver, but travelers are now also planning trips that are focused on escape, adventure and cultural experiences. One motivator that promises to be a growing trend in 2022: wellness trips (or travel “to improve my mental health”).

Globally, motivations differ by region and country: German travelers are uniquely driven by relaxation (77 percent), while French and Canadian respondents are much more likely to say they want to escape or get away (68 and 60 percent, respectively).

Survey conducted Feb. 16-17, 2022, among a representative sample of 2,200 U.S. adults, with an unweighted margin of error of +/- 2 percentage points.
In Europe and North America, there is more confidence about upcoming leisure travel in 2022 than there was last fall. Travelers in these regions are anticipating trips soon — compared with October 2021, there has been a 17-point increase among Germans who say they’ll travel within the next six months and a 13-point increase among U.K. respondents.

On the other hand, the unpredictable course of the pandemic has shaken some global travelers’ confidence in hitting the road. This is particularly true in East Asia, where the share of respondents who say they will never go on a leisure trip again has grown in each country.

Surveys conducted in October 2021 and February 2022 among representative samples of 1,000 to 2,200 adults in each of the countries shown, with an unweighted margin of error of up to +/- 3 percentage points.
WHAT IT MEANS: TWO YEARS INTO THE PANDEMIC, TRAVELERS ARE LARGELY SET IN THEIR WAYS

2022 promises to be a better year for the industry than 2021, but recovery will still be slow.

The availability of vaccines was an important inflection point in the travel industry’s recovery in 2021, but with vaccine uptake topping out in the United States and comfort levels only slightly dampened by the omicron surge, it appears that consumers have reached a phase of the pandemic where their openness to traveling is no longer impacted by external forces. In short, those who want to travel don’t have much reason to delay, and those who don’t want to won’t be easily swayed.

For the industry, this means the slow path to recovery continues and will be bolstered by seasonal trends. However, aside from the possibility of a stronger or more dangerous COVID-19 variant emerging, that recovery shouldn’t experience much volatility (positive or negative).

WHAT THIS MEANS FOR TRAVEL BRANDS

Concern for one’s own health is only one piece of the puzzle. Brands must keep this in mind when deciding on a path forward on safety protocols, mask mandates and the like — travelers continue to be concerned about the impact their trips will have on others.

Travel motivators are shifting during this phase of the pandemic, and brands should tap into growing areas like wellness travel to capture an audience that is eager to hit the road, but also still feeling the stressors of two years of pandemic life.
SECTION 2

THE STATE OF AIR TRAVEL AND TRANSPORTATION

A look at who will be traveling by plane or shared transportation in the coming months, why they book and what they expect of brands.
WHO’S TAKING FLIGHT THIS SPRING?

OVERALL

14% of all U.S. adults will travel by plane in the next three months

41% of those with travel plans in the next three months expect to fly

DEMOGRAPHIC BREAKDOWN

GENERATION

- Gen Z: 16%
- Millennials: 35%
- Gen X: 21%
- Boomers: 27%

HOUSEHOLD INCOME

- Less than $50,000: 31%
- $50,000 - $99,999: 39%
- $100,000 or more: 30%

GEOGRAPHIC LOCATION

Traveling by plane

- West: 27%
- Midwest: 18%
- Northeast: 18%
- South: 37%

Total population by region

- West: 24%
- Midwest: 21%
- Northeast: 18%
- South: 37%

TRAVEL FREQUENCY IN A TYPICAL PRE-PANDEMIC YEAR

- Frequent (3 or more trips): 24%
- Casual (1-2 trips): 71%
- Rare (less than 1 trip): 5%

VACCINATION STATUS

- Vaccinated: 83%
- Unvaccinated: 11%
- Unsure: 6%

Survey conducted Feb. 16-17, 2022, among a representative sample of 2,200 U.S. adults, with an unweighted margin of error of +/- 2 percentage points.
Travelers may be more comfortable flying than they were in the fall of 2021, but comfort doesn’t always translate to behavior. January and February are typically quiet months for air travel, and consumer intent mirrors that post-holiday lull.

However, the inverse relationship between travel by air and by personal car suggests that travelers are trading off between the two — and that they may continue to lean toward road trips in the coming months for increased safety and flexibility.

While omicron-driven flight disruptions dominated the headlines over the holiday season, they didn’t appear to have a significant impact on booking preferences. Safety and flexibility, while important, haven’t experienced major gains in priority, and price remains by far the top consideration for travelers when booking transportation.

Higher-order considerations like the environmental impact of the route or a brand’s treatment of its employees tend to rank consistently among the bottom of most travelers’ priorities.

Through the rise and fall of the omicron variant, travelers didn’t waver much on their expectations for safety measures — for all actions, the share of those saying brands should “definitely” take them remained largely consistent from the fall of 2021 through the early days of 2022, with slight declines between January and February.

There are, however, some differences in priority between the general population and those who will be traveling by plane, bus or train in the next three months. Among those with imminent trips, there is a higher level of agreement that brands should be enacting safety protocols, despite the fact that this group already has a higher level of protection — they are 10 percentage points more likely to be vaccinated than the general public.

Survey conducted Feb. 16-17, 2022, among a representative sample of 2,200 U.S. adults, with an unweighted margin of error of +/- 2 percentage points.
The ever-shifting level of risk throughout the pandemic has required travelers to maintain flexibility in their plans, cautiously booking travel with the knowledge that they may have to reschedule or cancel. With that in mind, some are willing to pay a premium to be able to cancel their trip easily.

While slightly less compelling than free cancellation, a focus on pandemic safety may also compel consumers to spend more as they seek out brands that go above and beyond to help them avoid exposure.

Survey conducted Feb. 16-17, 2022, among a representative sample of 2,200 U.S. adults, with an unweighted margin of error of +/- 2 percentage points.
WHAT IT MEANS: CONSUMERS ARE WEIGHING THE RISKS AND BENEFITS OF SHARED VERSUS PRIVATE TRANSPORTATION

Air travel continues to raise concerns for travelers.

Even with comfort levels generally rising, the uncertainty of flight disruptions or cancellations, coupled with the heightened level of exposure to others throughout the journey, has resulted in a continued hesitancy to travel by plane versus other forms of transportation.

Specifically, the inverse relationship between travelers who plan to fly and those planning a road trip in the next three months suggests that people are making the trade-off between the two, often preferring the flexibility, certainty and safety provided by trips in a private car.

WHAT THIS MEANS FOR TRAVEL BRANDS

The airline industry was impacted by disruptions over the holiday season, but travelers were willing to look past many issues due to the unprecedented pace of omicron. Going forward, airlines must continue to prioritize transparent communication to retain traveler trust.

Price remains paramount in booking transportation. Many travelers have funds saved from two years of staying close to home and may be willing to splurge, but that mindset will not last forever. Brands must approach pricing strategies with this evolving reality in mind.

Travelers with plans to take shared transport are more open to COVID-19 protocols than the average American. As cases wane and mandates are lifted in other areas of public life, travel brands must continue to keep an eye on where their customers stand on safety measures.
Section 3

The State of Hotels and Accommodations

Key audiences for hotels and vacation rentals in the coming months, what drives their decisions and how they’re protecting against uncertainty
WHO’S HEADING TO A CHAIN HOTEL THIS SPRING?

OVERALL
16% of all U.S. adults will stay at a chain hotel in the next three months
49% of those with travel plans in the next three months expect to stay at a chain hotel

DEMOGRAPHIC BREAKDOWN
- GENERATION
  - Gen Z: 9%
  - Millennials: 39%
  - Gen X: 23%
  - Boomers: 28%

- HOUSEHOLD INCOME
  - Less than $50,000: 43%
  - $50,000 - $99,999: 33%
  - $100,000 or more: 23%

GEOGRAPHIC LOCATION
- Staying in a chain hotel:
  - West: 23%
  - Midwest: 21%
  - Northeast: 16%
  - South: 40%

- Total population by region:
  - West: 24%
  - Midwest: 21%
  - Northeast: 18%
  - South: 37%

TRAVEL FREQUENCY IN A TYPICAL PRE-PANDEMIC YEAR
- Frequent (3 or more trips): 69%
- Casual (1-2 trips): 27%
- Rare (less than 1 trip): 4%

VACCINATION STATUS
- Vaccinated: 75%
- Unvaccinated: 16%
- Unsure: 10%

Survey conducted Feb. 16-17, 2022, among a representative sample of 2,200 U.S. adults, with an unweighted margin of error of +/- 2 percentage points.
WHO’S BOOKING VACATION RENTALS THIS SPRING?

OVERALL
6% of all U.S. adults will stay in a vacation rental in the next three months
20% of those with travel plans in the next three months expect to stay in a vacation rental

DEMOGRAPHIC BREAKDOWN

GENERATION
- 21% Gen Z
- 46% Millennials
- 17% Gen X
- 16% Boomers

HOUSEHOLD INCOME
- 33% Less than $50,000
- 40% $50,000 - $99,999
- 27% $100,000 or more

GEOGRAPHIC LOCATION

- Staying in a vacation rental:
  - West: 22%
  - Midwest: 21%
  - Northeast: 16%
  - South: 43%

- Total population by region:
  - West: 24%
  - Midwest: 21%
  - Northeast: 18%
  - South: 37%

TRAVEL FREQUENCY IN A TYPICAL PRE-PANDEMIC YEAR
- 26% Frequent (3 or more trips)
- 71% Casual (1-2 trips)
- 10% Rare (less than 1 trip)

VACCINATION STATUS
- 71% Vaccinated
- 20% Unvaccinated
- 10% Unsure

Survey conducted Feb. 16-17, 2022, among a representative sample of 2,200 U.S. adults, with an unweighted margin of error of +/-2 percentage points.
Many travelers opted to stay with friends and family during their holiday travels, but for plans in the coming months, those stays are declining in favor of paid accommodations.

While there hasn’t been a significant shift in overall accommodation preferences, there are differences in inclination by generation, income and ethnicity.

Importantly, not all stays are equal — those staying in vacation rentals are taking longer trips than those staying in hotels. A quarter of those staying in a vacation rental plan to travel for at least one to two weeks.

Expected accommodation among those with travel plans in the next three months

TRAVELERS FOCUS ON PRICE, SAFETY WHEN BOOKING ACCOMMODATIONS

As was the case with transportation, booking priorities in accommodations remained largely unshaken through the holiday season, and most travelers are still heavily price-driven.

Safety and flexibility also remain key considerations — understandable given the unpredictable nature of the pandemic — and the physical location of the space rounds out the top priorities for booking accommodations.


Share who said the following considerations were a top priority when booking accommodations:

- Safety measures
- Amenities
- Location of accommodation
- Flexibility
- Experience with brand
- Price
- Size of room or home

Travelers with household income of less than $50,000 are currently least likely to say price is a top priority.
COVID-19 SAFETY EXPECTATIONS VARY BY CHOSEN ACCOMMODATION

Compared with those who will be traveling by plane, bus or train in the coming months, those with plans to stay at a hotel or vacation rental are less concerned about safety measures. There are also meaningful differences between those who plan to stay in a hotel and those planning to use a vacation rental.

Vacation rental-goers are generally more cautious on many fronts, saying that brands should continue to focus on providing COVID-19 testing and information about safety protocols. However, they are less likely to support mandatory vaccination than those staying in hotels, likely because hotel stays require more in-person interaction with staff.

Survey conducted Feb. 16-17, 2022, among a representative sample of 2,200 U.S. adults, with an unweighted margin of error of +/-2 percentage points.
Travelers are slightly more open to paying a premium for both flexibility and safety in accommodations than they are for transportation (especially ground travel). But not all travelers are equally eager to trade up.

Younger generations are more open to paying more, while baby boomers were the most likely to say they will not spend extra money for either flexibility or safety. And the more engaged the traveler, the more likely they are to trade up — frequent leisure travelers and travel rewards program members are among those most likely to pay a premium.

Survey conducted Feb. 16-17, 2022, among a representative sample of 2,200 U.S. adults, with an unweighted margin of error of +/- 2 percentage points.
WHAT IT MEANS: VACATION RENTALS CONTINUE TO ANSWER UNIQUE TRAVELER NEEDS

Hotels and vacation rentals appear to attract audiences with different priorities, but there are opportunities for crossover.

While vacation rentals’ customer base remains lower than hotels’, the key segments are crucial for the growth of the space: younger, more affluent travelers. Hotel brands must consider some of the unique drivers that lead these travelers to choose vacation rentals — the uniqueness of décor and connection with the local community are commonly referenced differentiators. But it often comes down to something much simpler, like the size of the room or home (particularly important to millennials, who are most likely to be parents traveling with young children).

WHAT THIS MEANS FOR TRAVEL BRANDS

While there are some areas where hotels cannot replicate the vacation rental experience, they can leverage unique features to lure travelers. For example, the ability to earn or pay with loyalty points or rewards is particularly compelling for millennials.

Vacation rentals can be positioned as uniquely safe during COVID-19, given the lack of in-person interaction. However, travelers still feel more comfortable staying in a hotel. Homeshare brands must further understand and answer guest concerns to build comfort.
Business travel will never return to a pre-pandemic normal, but a new era of blended travel is emerging in its place.
Counter to predictions that business travel would return, albeit slower than leisure, the expectations of business travelers globally have largely remained unchanged since the fall.

China and the United Kingdom both saw slight growth in expectations: Intent to travel in the next three months rose by 2 and 9 points, respectively, between October and February. However, the number of pre-pandemic business travelers who say they will never take a business trip again has grown in multiple markets, suggesting that the extended downturn is becoming ingrained in permanent behavior.

Surveys conducted in October 2021 and February 2022 among representative samples of 1,000 to 2,200 adults in each of the countries shown, with an unweighted margin of error of up to +/- 3 percentage points. Figures may not add up to 100% due to rounding.
Increased flexibility in work locations and schedules has prompted people to think about traveling in new ways. While much has been made of digital nomads (those who forgo a primary residence to work from the road), the real opportunity for brands lies in a far more common behavior: blending business and leisure trips. Many are shut out of the digital nomad lifestyle by responsibilities or simply a desire to have a home base, but they can still take advantage of flexible work arrangements to travel more often, for longer periods of time or to places where they might not have the time or money to go otherwise.

**NEW WAYS OF WORKING, NEW WAYS OF TRAVELING**

Currently employed respondents were asked what types of trips they anticipate taking in the next year

- **Blended, even split**: 40%
- **Blended, primarily business**: 40%
- **Blended, primarily leisure**: 44%
- **Business only**: 41%

Difference in share of those planning a trip in the next 12 months versus those who did so at least once a year prior to COVID-19

- **+8**: 40%
- **+8**: 40%
- **+6**: 44%

**Involves work in some way**

Currently employed respondents were asked if they planned to spend any time this year as a digital nomad

- **Currently are and plan to continue**: 76%
- **Currently are but plan to stop**: 6%
- **Not currently but plan to start**: 5%
- **Not currently and don't plan on starting**: 12%

Survey conducted Feb. 4-5, 2022, among a representative sample of 1,163 U.S. adults, with an unweighted margin of error of +/- 3 percentage points.

Survey conducted Feb. 12-13, 2022, among a representative sample of 1,204 U.S. adults, with an unweighted margin of error of +/- 3 percentage points.
For those blending business and leisure travel, there is no clear consensus on what the main motivating factor is — in fact, travelers appear to be driven nearly equally by multiple considerations that encompass everything from lifestyle to finances to logistics.

For brands, this means there’s an opportunity to tap into a wide variety of messaging approaches and highlight the various benefits of blended travel without alienating those who aren’t driven by those benefits.

Survey conducted Feb. 4-5, 2022, among a representative sample of 586 U.S. adults, with an unweighted margin of error of +/- 4 percentage points. Figures may not add up to 100% due to rounding.
Brands may imagine blended travel as a long, perhaps even multi-destination affair. And while there’s a small group of travelers hitting the road for extended “workcations,” the majority of trips among those blending business and leisure will be less than a week in length.

Another preconceived notion is that those blending their travel will be flocking to vacation rentals for the ideal mix of space and personality in accommodations. In reality, these trips are more likely to take travelers to traditional hotels, perhaps opening the door for hotels to provide some of the amenities these travelers seek to optimize their experience.

Survey conducted Feb. 4-5, 2022, among a representative sample of 586 U.S. adults, with an unweighted margin of error of +/- 4 percentage points.
The relative preference of certain amenities among travelers with blended travel plans can provide guidance for brands’ product development and messaging. Perhaps unsurprisingly, **Wi-Fi is by far the most preferred offering**.

There are some demographic differences in preference: For younger travelers (ages 18-34), Wi-Fi still ranks at the top but is less of a differentiator. Instead, young travelers are more likely than their older counterparts to want **tech-forward amenities like self check-in/checkout and equipment to facilitate meetings, as well as lifestyle amenities like workout facilities and laundry**.

Those who plan to stay in a vacation rental also have slightly different priorities than those who opt for a hotel. Again, Wi-Fi is still most important, but **unique design/décor and equipment and tools to facilitate meetings are also key**.

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**WI-FI IS TABLE STAKES FOR “WORKCATIONS”**

The relative preference of amenities at accommodations used for blended travel is as follows:

<table>
<thead>
<tr>
<th>Amenities</th>
<th>Utility Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fast Wi-Fi</td>
<td>190</td>
</tr>
<tr>
<td>Free Wi-Fi</td>
<td>182</td>
</tr>
<tr>
<td>Close proximity to work location</td>
<td>143</td>
</tr>
<tr>
<td>Connection to the community</td>
<td>141</td>
</tr>
<tr>
<td>Great customer service</td>
<td>132</td>
</tr>
<tr>
<td>Ability to redeem loyalty points or rewards</td>
<td>114</td>
</tr>
<tr>
<td>Access to entertainment in room</td>
<td>113</td>
</tr>
<tr>
<td>Close proximity to leisure activities</td>
<td>105</td>
</tr>
<tr>
<td>Equipment or tools to facilitate virtual business meetings</td>
<td>96</td>
</tr>
<tr>
<td>Ability to earn loyalty points or rewards</td>
<td>96</td>
</tr>
<tr>
<td>A dedicated space to work</td>
<td>88</td>
</tr>
<tr>
<td>Unique design/décor</td>
<td>79</td>
</tr>
<tr>
<td>On-site or in-room dining</td>
<td>79</td>
</tr>
<tr>
<td>Access to parking</td>
<td>78</td>
</tr>
<tr>
<td>Self check-in/checkout</td>
<td>76</td>
</tr>
<tr>
<td>Access to workout equipment and/or fitness programs</td>
<td>75</td>
</tr>
<tr>
<td>Housekeeping services</td>
<td>70</td>
</tr>
<tr>
<td>Access to laundry or dry cleaning</td>
<td>67</td>
</tr>
<tr>
<td>High-quality toiletries</td>
<td>62</td>
</tr>
<tr>
<td>Coffee machine</td>
<td>61</td>
</tr>
<tr>
<td>Recommendations for local activities</td>
<td>56</td>
</tr>
</tbody>
</table>

The average utility score is 100*.

*Average MaxDiff utility scores for various attributes reflect the relative preference of each item. If an attribute has a score of 100, travelers are equally as likely as not to say that’s the most important attribute; a score of 200 means they will select it twice as often as average, and a score of 50 means they will select it half as often as average.

Survey conducted Feb. 4-5, 2022, among a representative sample of 2,201 U.S. adults, with an unweighted margin of error of +/- 2 percentage points.
Blended travel represents a growing share of trips and prompts new needs.

The number of workers who have decided to ditch their permanent home and live as digital nomads has indeed increased during the pandemic, but brands that only focus on the most extreme behavior are missing out on the real area of growth. There is a much broader audience of employed travelers who are leveraging new flexibility in where and when they work to blend business and leisure trips.

Blended trips prompt travelers to seek out accommodations that can answer their business and leisure needs — having access to fast and free Wi-Fi is a must, but proximity to both business and leisure activities, access to entertainment, and great customer service are also strong drivers in the space.

**WHAT IT MEANS: BRANDS WAITING FOR THE RETURN OF BUSINESS TRAVEL WILL MISS OUT ON NEW OPPORTUNITIES**

**WHAT THIS MEANS FOR TRAVEL BRANDS**

- **Brands can no longer neatly separate business and leisure travelers.** Instead, they must offer a variety of amenities to address new blended needs, allowing travelers to make the most of both aspects of their trip.

- **Connection is key** — if a brand isn’t offering fast and free Wi-Fi as part of basic accommodations, it will be much less likely to be considered by travelers.
THE DATA BEHIND THE REPORT

Methodology and about the author
This report is grounded in multiple datasets:

- Monthly survey research conducted from October 2021 to February 2022 among roughly 2,200 U.S. adults
- Data from a February 2022 survey of 7,000 adults across Canada, China, France, Germany, Japan, South Korea and the United Kingdom
- “Return to Normal” trend data leveraged from weekly surveys of 2,200 U.S. adults

The interviews were conducted online, and the data was weighted to approximate respective populations of adults based on gender, educational attainment, race and region. Top-line results from all surveys have a margin of error of up to +/- 3 percentage points.
Lindsey Roeschke is the travel & hospitality analyst at global intelligence company Morning Consult, where she leads efforts to deliver real-time insights for leaders in the sector.

Prior to joining Morning Consult, she served as a director of consumer & culture analysis at Gartner, where she focused on behavior and expectations in travel (among other categories), particularly through a generational and cultural lens. In addition to her research and advisory background, Lindsey has more than a decade of experience in the ad agency world, and she has lived and worked in six cities across three different continents.

Lindsey graduated from the University of Delaware with a bachelor’s degree in communications and holds a master’s degree in strategic communications from Villanova University.

Matthew Howe, senior manager of travel intelligence at Morning Consult, contributed to this report.
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