The State of Travel & Hospitality

How consumers are reshaping the travel & hospitality industry amid the COVID-19 pandemic and economic concerns

H2 2022
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Executive Summary

2022 was poised to be a strong recovery year for travel & hospitality, but economic uncertainty has replaced travelers’ pandemic concerns, halting the momentum of regrowth for the industry.

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

Based on survey interviews with more than 16,000 adults across the Americas, Europe and the Asia-Pacific region, this report provides insight into how consumers are thinking about, planning for and engaging with 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 lines between business and leisure travel, all informed by the same data-driven consumer research.

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

- Within a month: 14%
- In 1-3 months: 22%
- In 4-6 months: 16%
- In 7-12 months: 14%
- In over a year: 20%
- Never: 14%

Source: Morning Consult Research Intelligence
COVID-19 concerns have given way to financial worries. Consumer comfort with traveling has grown as pandemic concerns have abated. But despite a busy early summer, volume has again dropped in the face of economic uncertainty.

Air travel will slow into shoulder season. Memorial Day to July Fourth — a consistently busy period for airlines — became a “flightmare” as delays and cancellations shook consumer trust. With gas prices now falling, travelers are again considering more budget-friendly road trips as an alternative to air travel.

Business travel will never return to normal. More than two years since the start of the pandemic, traditional business trips still have not returned to typical levels. The number of travelers blending business and leisure travel has also declined in recent months, as employees have settled into new realities of work.

Hotels are poised to gain market share from vacation rentals. Summer is vacation rental season, but as families send children back to school and beach rentals slow, volume will shift back to hotels in the coming months.
The Travel Industry’s ‘Return to Normal’

Our high-frequency weekly data shows how consumers’ relationships with travel are evolving.
After taking their “revenge trips,” consumers’ intent to travel has cooled

Intent to travel in the coming year climbed through 2021 and remained on an upward trajectory into 2022 — all the way up until July. The sharp drop in those planning to travel domestically within the next year suggests that travelers took their “revenge trips” in early summer and are now pulling back on plans for the remainder of the year.

While concerns of rising COVID-19 cases may play a part in this decline, a more significant factor is the economy: 43% of Americans say they’re traveling less this summer because of high prices.

Source: Morning Consult Research Intelligence
Traveler comfort levels rebounded in early spring after an omicron-related dip over the 2021 holiday season. But as pandemic protocols were lifted (the end of the airline mask mandate, for example), comfort experienced another dip, followed by yet another as inflation worries reached a fever pitch in early summer.

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 rather than shared transport, and with domestic rather than international travel.

Traveler comfort has dipped slightly

Share of U.S. adults who say they feel comfortable doing the following right now:

- Taking a road trip
- Renting a car
- Flying domestically
- Flying on an airplane
- Taking a train
- Taking a bus
- Flying internationally

Source: Morning Consult Research Intelligence
While comfort levels across all groups of travelers have risen throughout 2022, **two groups have consistently been more comfortable with traveling: high earners and those who have traveled in the previous year.**

These groups are not mutually exclusive: Those from high-earning households are more likely to travel frequently than their lower-income counterparts in a typical year, and the same is true in the pandemic era.
Inflation and fears of an economic recession have impacted travelers’ plans. Between October 2021 and July 2022, the share of U.S. adults who said they were planning a trip because they had money saved up that they wanted to spend decreased 4 percentage points. The drop was particularly notable among those in the middle-income bracket, with that share dropping 6 points.

Over the same period, inflation rose from just over 6% to 8.5%, meaning consumers had less money to put away, or even had to dip into their savings to pay for necessities. The drop in travel plans among middle-income consumers is likely outsized because higher earners are on better financial footing in terms of savings, and lower earners were less likely to have been planning this type of travel to begin with.

Source: Morning Consult Research Intelligence
Most travelers look for less expensive options before changing plans

While inflation is putting a damper on many travelers’ plans, people are seeking out alternatives before they resort to canceling a trip completely. The most common behavior is searching for cheaper fares or bookings, with nearly half of consumers saying they’ve done this in the last month.

Consumers of different generations take slightly different approaches to coping with inflation. Gen Z adults and millennials are more likely to have booked travel with points or rewards instead of cash or credit, although millennials are also the most likely to have canceled travel plans altogether. Baby boomers, on the other hand, are the least likely to have taken any of the cost-mitigating actions, even though they are just as likely as other generations to have leisure travel plans in the next three months, signaling their resilience against economic uncertainty.

Shares who said they have done the following in the past month to save money:

Source: Morning Consult Research Intelligence
Those who are planning to travel in the coming year are mostly motivated by the traditional benefits of vacation: relaxing and getting away from home. Relaxation has overtaken spending time with friends and family as the top goal, as travelers have been able to reunite with loved ones who live far away after pandemic-related pullbacks. Adventure and mental health-related travel remain strong motivators as well, with around a quarter of travelers citing each as a reason for their trip.

While traveling for mental health benefits remains a growing trend in the United States, it is outpaced in other countries: Every market besides France and Russia reports a higher share of people traveling to improve their mental health, with Japanese and Brazilian travelers being the most enthusiastic at 54% and 50%, respectively.

Source: Morning Consult Research Intelligence
Americans are pulling back while the rest of the world travels

Since the spring, the share of consumers in most international markets who say they will travel within the next year has grown. But the United States is bucking this trend: From April to July, the share of U.S. adults saying they’ll travel in the next three months is down 3 points, the share saying they will travel in the next year dropped 5 points and the share saying they’ll never travel again saw a slight uptick.

Conversely, despite faltering economic conditions worldwide, consumers in other markets show resilience — especially in China, where the share of adults saying they’ll travel within the next three months rose a staggering 18 points. This suggests that Americans are more likely than others to pull back on travel in times of financial uncertainty.

Shares of adults on when they expect to take their next leisure trip

United States
- Within 3 months: 71% (Apr 22), 39% (Jul 22)
- Within a year: 66% (Apr 22), 36% (Jul 22)
- Never again: 12% (Apr 22), 9% (Jul 22)

Canada
- Within 3 months: 67% (Apr 22), 27% (Jul 22)
- Within a year: 67% (Apr 22), 33% (Jul 22)
- Never again: 14% (Apr 22), 17% (Jul 22)

China
- Within 3 months: 54% (Apr 22), 17% (Jul 22)
- Within a year: 65% (Apr 22), 14% (Jul 22)
- Never again: 8% (Apr 22), 9% (Jul 22)

France
- Within 3 months: 67% (Apr 22), 30% (Jul 22)
- Within a year: 68% (Apr 22), 45% (Jul 22)
- Never again: 13% (Apr 22), 10% (Jul 22)

Germany
- Within 3 months: 75% (Apr 22), 35% (Jul 22)
- Within a year: 77% (Apr 22), 52% (Jul 22)
- Never again: 6% (Apr 22), 6% (Jul 22)

Japan
- Within 3 months: 41% (Apr 22), 19% (Jul 22)
- Within a year: 45% (Apr 22), 26% (Jul 22)
- Never again: 17% (Apr 22), 20% (Jul 22)

South Korea
- Within 3 months: 57% (Apr 22), 20% (Jul 22)
- Within a year: 66% (Apr 22), 32% (Jul 22)
- Never again: 17% (Apr 22), 15% (Jul 22)

United Kingdom
- Within 3 months: 78% (Apr 22), 41% (Jul 22)
- Within a year: 75% (Apr 22), 47% (Jul 22)
- Never again: 5% (Apr 22), 8% (Jul 22)

Source: Morning Consult Research Intelligence
WHAT IT MEANS: Cost has overtaken COVID-19 as the primary concern among travelers

2022 started strong, but recovery will slow due to heightened economic worries.

Cost concerns have caused travelers to pull back on plans, meaning a busy early summer will be followed by a slow shoulder season and remainder of the year, aligning with typical seasonal trends. While volume will likely experience a bump during the holiday season, inflation worries may cause some travelers to stay closer to home this year.

Rather than panic at the prospect of lower volume, travel brands must shift their focus to high earners and consumers who have traveled in the past year — the groups most likely to still be hitting the road — and spotlight deals.

WHAT THIS MEANS FOR TRAVEL BRANDS

Travelers are in deal-seeking mode. Brands must cater to travelers who are now cost-conscious rather than COVID-conscious. They should help frugal travelers limit spending — especially those from middle-income families who may have exhausted their savings — and encourage them to take trips rather than stay home.

Loyalty programs can shine. Consumers concerned about paying for travel with cash or credit are looking for alternatives before changing or canceling plans. Brands must help connect them with opportunities to earn and redeem points and rewards.
Business Travel

Business travel will never return to a pre-pandemic normal, but a new era of blended travel is emerging in its place.
More than two years since COVID-19 emerged, it’s undeniable now that business travel will never return to a pre-pandemic normal. But while the 2 in 5 American business travelers who won’t return to hitting the road sounds like an alarming number, it pales in comparison to many other markets.

Europe shows the most significant shift, with all surveyed countries but Spain reporting a higher share of business travelers who say they’re done for good. Things look a bit more promising in the BRIC markets, though — particularly India, where half of the country’s business travelers say they’ll likely go on a work trip in the next six months.

Source: Morning Consult Research Intelligence
As Americans settled into new ways of working, many sought to blend business travel with leisure travel. But since the spring, it appears that the challenging reality of combining work with play has sunk in for many of these travelers.

The share of adults saying they’d take a trip that involves work in some way dropped around 10 percentage points across all occasions between February and May, while the share saying they’d travel for leisure stayed the same.

The best predictor of whether someone will engage in blended travel now is their pre-pandemic behavior. More than half of those who took “bleisure” trips before COVID-19 shutdowns say they’ll take a trip that equally combines business and leisure in the next year, compared with just 5% of those who didn’t take bleisure trips before the pandemic. That pattern holds true across all occasions, with those who traveled frequently before the pandemic being the most likely to do so again.

**Source:** Morning Consult Research Intelligence
When travel occasions are combined, it can be difficult to identify the primary stakeholder. But likely due to the skew toward leisure in blended travel, workers report covering more costs out of pocket, as opposed to these expenses being paid by their employers.

This is particularly true when it comes to meals and entertainment. More than half of blended travelers report being primarily or solely responsible for funding these categories. Accommodation costs, meanwhile, are the most likely to be fully covered by the employer.

Source: Morning Consult Research Intelligence
Brands may imagine blended travel as a long, perhaps even multidestination affair. But while there’s a small group of travelers hitting the road for extended “workcations,” the majority of trips that blend business and leisure will last less than a week. A plurality will travel for just two or three days, while just under a third say they will be on the road for four to six days. This means blended travelers have a lot of activities to fit into a short trip and may not have much downtime. Helping them find efficiencies to make the most of these short trips will go a long way toward making these trips more successful.

**Anticipated length of blended trips in the next year**

<table>
<thead>
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<th>Duration</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Day trip</td>
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<tr>
<td>2-3 days</td>
<td>42%</td>
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<tr>
<td>4-6 days</td>
<td>31%</td>
</tr>
<tr>
<td>1-2 weeks</td>
<td>11%</td>
</tr>
<tr>
<td>More than 2 weeks but less than 1 month</td>
<td>1%</td>
</tr>
<tr>
<td>1 month or more</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: Morning Consult Research Intelligence
When blended travelers prioritize the amenities they most desire on flights, **free Wi-Fi is consistently at the top**. Unlike rankings for accommodations, where fast Wi-Fi ranks a close second, travelers don’t have high expectations of speedy connections at 30,000 feet. Instead, they prioritize experience — free food and extra legroom — as well as great customer service.

Moreover, there’s little variation in these preferences across most consumer groups. Generational breakdowns reveal similar rankings, and there are only minor differences between casual and frequent travelers.

But there is one exception. The wealthiest blended travelers — those from households earning at least $100,000 a year — more highly prioritize comfort-related amenities like extra legroom and lounge access.

Source: Morning Consult Research Intelligence
Travelers are tempering their expectations of blended trips.

The share of workers who plan to go on a trip blending business and leisure has declined since the spring, suggesting the realities of combining trip occasions may be more challenging than anticipated. The travelers most likely to engage in this behavior are those who were already doing so before the pandemic and those whose planned trips are relatively short.

In the air, bleisure travelers primarily value connection in the form of free Wi-Fi, although they also prioritize amenities that make their flight a more pleasant experience, like free food and extra legroom. In order to court these travelers and encourage repeat behavior, travel companies must deliver on these expectations.

WHAT IT MEANS: The early rush for blended trips is softening

WHAT THIS MEANS FOR TRAVEL BRANDS

Business travel shows the most promise of returning in BRIC countries. Brands that cater to business travelers may find success targeting Brazil, Russia, India and China over Europe, where most business travelers are reluctant to return to the road.

Connection is key. If an airline isn’t offering fast and free Wi-Fi as part of its in-flight service, it will struggle to appeal to business travelers.
Air Travel and Transportation

A look at who will be traveling by shared transportation in the coming months, why they book and what they expect from brands
Who’s taking flight?

13% of U.S. adults say they will travel by plane in the next three months

37% of those with travel plans in the next three months expect to fly

By generation

- Gen Z adults: 8%
- Millennials: 36%
- Gen Xers: 24%
- Baby boomers: 31%

By household income

- Less than $50,000: 29%
- $50,000-$99,999: 41%
- $100,000 or more: 31%

By leisure travel frequency in a typical pre-pandemic year

- Frequent (3 or more trips): 23%
- Casual (1-2 trips): 73%
- Infrequent (almost no trips): 73%

By region

- Northeast: 22%
- Midwest: 20%
- South: 37%
- West: 22%

Share saying they will fly

- Northeast: 17%
- Midwest: 21%
- South: 38%
- West: 24%

Share of U.S. population

- Northeast: 17%
- Midwest: 21%
- South: 38%
- West: 24%

What’s changed?

Summer travel demographics skew slightly older compared with spring, when Gen Zers made up 16% of those taking flight — likely a reflection of students’ spring break plans.

Source: Morning Consult Research Intelligence
Summer flight disruptions have shaken trust in the airline industry

The spate of flight delays and cancellations this summer has eroded trust among travelers — unlike sentiment over similar disruptions during the 2021 winter holidays, from which airlines emerged mostly unscathed.

The difference this time? **Travelers feel delays and disruptions could — and should — have been avoided.** So while they had some level of understanding over the winter holidays that a surge in COVID-19 cases caused unexpected disruptions in the form of staff taking sick leave, they perceive the current staffing shortages and related operational issues to be challenges that airlines should have foreseen as travel demand returned.

"Net trust" is the share of U.S. adults who said they trust each brand "a lot" or "some" minus the share who said "a little" or "not at all."

Source: Morning Consult Brand Intelligence
Travelers continue to trade off between driving and flying

The inverse relationship between road trips and air travel has continued to play out through 2022, suggesting an ongoing tradeoff between the two primary forms of transportation.

High gas prices started to push more travelers toward airlines in June, but a combination of chaos at airports and falling prices at the pump has pushed the pendulum back in the opposite direction, with trips by personal and rental vehicles back on the rise in July.

Expected forms of transportation among U.S. adults with travel plans in the next 3 months

Suburban adults are the most likely to drive any vehicle, while rural adults are the most likely to drive their own vehicle.

Source: Morning Consult Research Intelligence
Safety measures are less important as COVID-19 concerns wane

After a slight bump in June, the share of travelers naming price as their top priority when booking transportation dipped in July, likely due to slightly softening inflation concerns.

Trending downward, meanwhile, is the share of travelers citing safety measures as their top priority. This share peaked in late 2021, coinciding with fears of the omicron variant, but it has since fallen and is now 6 points lower than its high-water mark in November.

With other considerations experiencing variability, route and previous experience with a brand remain consistent in terms of their importance to consumers over time.

Source: Morning Consult Research Intelligence
Travel booking windows have shortened in the past two years, with consumers now waiting longer to purchase transportation due to concerns that their trip may have to be rescheduled or canceled due to COVID-19. **But as pandemic-related concerns have declined, travelers have been more open to securing their tickets further in advance**, with more of them now booking 4-6 months ahead of time instead of 1-3 months.

While travel frequency doesn’t impact booking window variability (casual leisure travelers are likely to book around the same time as frequent leisure travelers), higher-income and older travelers tend to book a bit further in advance than their younger and lower-income counterparts.

**How far in advance travelers say they book transport to their destination**

- Under 1 month
- 1-3 months
- 4-6 months
- 7-12 months
- Over 1 year

Source: Morning Consult Research Intelligence
The ever-shifting level of risk throughout the pandemic has prompted travelers to keep their plans flexible, cautiously booking travel with the knowledge that they may have to reschedule or cancel. With this in mind, some say they’re willing to pay a premium for the option to cancel their trip easily.

Younger travelers in particular are more open to paying extra for a fare that includes free cancellation. More than a third of Gen Zers and just over a quarter of millennials say they will pay $50 or more for flexibility — significantly higher than the shares of Gen Xers (10%) and baby boomers (5%). Notably, travelers across all generations are willing to pay extra for a free cancellation option when they’re taking a more expensive form of transportation.

Source: Morning Consult Research Intelligence
WHAT IT MEANS: Consumers vacillate between air travel and road trips

Travelers’ transportation preferences are primarily driven by price.

The inverse relationship between people planning to travel by plane and by car in the coming months suggests that consumers are making a trade-off between the two, and that this choice is often influenced by price differences.

Beyond price, travelers have been influenced by the chaos at airports in early summer, which has resulted in them losing trust in all major airlines and choosing to travel by car instead.

WHAT THIS MEANS FOR TRAVEL BRANDS

Travelers lost trust in airlines after a chaotic summer of delays and cancellations. As gas prices fall and travelers reconsider road trips, airlines must focus on clear and transparent communication to rebuild trust.

While safety (e.g., pandemic-related protocols) is less of a consideration to some travelers booking trips, it's still important to most. Brands must strike a balance between moving on from pandemic-centric messaging and proving to travelers that they are still looking out for their well-being.

As pandemic-related trip cancellations decline, travelers are booking further in advance. Travel companies should shift their path-to-purchase strategies to reach travelers who are ready to commit earlier.
SECTION 4

Hotels and Accommodations

A look at 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?

19% of U.S. adults say they will stay at a chain hotel in the next three months.

52% of those with travel plans in the next three months expect to stay at a chain hotel.

**DEMOGRAPHIC BREAKDOWN**

- **By generation**
  - Gen Z adults: 33%
  - Millennials: 23%
  - Gen Xers: 32%
  - Baby boomers: 9%

- **By household income**
  - Less than $50,000: 36%
  - $50,000-$99,999: 42%
  - $100,000 or more: 22%

**By region**

- Northeast: 19%
- Midwest: 20%
- South: 40%
- West: 21%

**By leisure travel frequency in a typical pre-pandemic year**

- Frequent (3 or more trips): 27%
- Casual (1-2 trips): 70%
- Infrequent (almost no trips): 3%

**What’s changed?**

Lower-income travelers represent a much smaller share of those staying in hotels compared with earlier this year. This is likely because many of these consumers traveled in early summer and are now cutting back due to cost concerns.

Source: Morning Consult Research Intelligence
Who’s booking vacation rentals?

**OVERALL**

6% of U.S. adults say they will stay in a vacation rental in the next three months.

17% of those with travel plans in the next three months expect to stay in a vacation rental.

**DEMOGRAPHIC BREAKDOWN**

- **By generation**
  - Gen Z adults: 12%
  - Millennials: 48%
  - Gen Xers: 11%
  - Baby boomers: 24%

- **By household income**
  - Less than $50,000: 26%
  - $50,000-$99,999: 40%
  - $100,000 or more: 31%

**By region**

- Northeast: 9%
- Midwest: 20%
- South: 41%
- West: 28%

- Share saying they’ll stay in a vacation rental:
  - Northeast: 17%
  - Midwest: 21%
  - South: 38%
  - West: 24%

- Share of U.S. population:
  - Northeast: 20%
  - Midwest: 21%
  - South: 38%
  - West: 24%

**What’s changed?**

Vacation rentals are attracting more baby boomers and casual travelers than they did in the spring, suggesting these accommodation options are becoming more mainstream.

Source: Morning Consult Research Intelligence
Group homes (with several households staying at a single property) and families going on summer vacation drove a rise in vacation rental bookings in early summer. But as fall approaches, hotels are regaining market share.

While the demographic breakdown of those staying in chain hotels mirrors the general population, vacation rental guests tend to be high earners and millennials.

Travelers staying in vacation rentals are taking longer trips than those staying in hotels. A quarter of people staying in a vacation rental say they plan to travel for at least a week or two, meaning they are more likely to need access to the kinds of amenities they’d find at home.

Source: Morning Consult Research Intelligence
Price remains the top priority when booking accommodation

Despite some fluctuation over time, price is by far the most important driver for travelers booking accommodation. As we also saw with transportation, safety measures have become less important as pandemic concerns have diminished, with an accommodation's location closely following as travelers' second highest priority.

There are some demographic differences in booking priorities. Baby boomers tend to prioritize safety more highly than other generations (likely due to continuing COVID-19 concerns), and high earners' awareness that plans may change at any time prompts them to look for flexible bookings.

Source: Morning Consult Research Intelligence
Contrary to movement in transportation booking windows, how far in advance travelers book accommodation has shortened in recent months. Almost a quarter say they book accommodation less than a month in advance, up 3 percentage points since October 2021, and travelers are 2 points less likely to book between seven months and a year in advance.

**Booking windows vary for different types of accommodation.** Those who plan on staying at a hotel are more likely to book closer to their trip, with 29% saying they’ll book within a month of traveling, compared with 19% of those staying at a vacation rental who say the same.

Source: Morning Consult Research Intelligence
Flexible accommodation is most important for younger and higher-income travelers

As is the case for air travel, just over half of U.S. adults say they’re willing to pay more for a hotel or vacation rental booking that offers free cancellation — though how much more varies by demographic.

Younger travelers, especially Gen Zers, are more open to paying extra, as are higher earners. Nearly a quarter of those from households earning $100,000 or more a year are willing to pay at least $50 for a flexible reservation, and 1 in 10 say they’ll pay at least $100 more for this benefit.

Frequent travelers are also more likely to pay a premium for bookings that can be canceled, with 24% saying they’ll pay at least $50 extra.

Shares of respondents who said they would pay extra for a booking that offers free cancellation

- Gen Z adults: 75%
- Millennials: 66%
- Gen Xers: 43%
- Baby boomers: 40%
- Less than $50k: 47%
- $50k-$99k: 57%
- $100k or more: 63%
- Frequent leisure: 64%
- Casual leisure: 52%

Source: Morning Consult Research Intelligence
WHAT IT MEANS: Hotels stand to gain market share as summer ends

Summer was vacation rental season, but traffic will slow going into fall and winter.

While vacation rentals have a more limited customer base than hotels, there are a few key segments that are crucial for growth in this space — namely, younger and wealthier travelers.

Hotel brands may be considering some of the unique factors that lead these travelers to choose vacation rentals, such as unique decor and connection with the local community, to regain their business. But it often comes down to something much simpler, like the size of the room or home (of particular importance to millennials, who are the most likely to have young children in tow). Hotels must make a conscious effort to appeal to those seeking the amenities of home. Offering the option to book adjoining rooms, providing access to refrigerators and kitchen tools, and highlighting play spaces for kids will draw in these travelers.

WHAT THIS MEANS FOR TRAVEL BRANDS

The end of summer will bring a decline in vacation rental bookings as families send their children back to school. **Brands in this space must expand their audience** in order to drive bookings heading into the shoulder season.

Travelers booking hotels are likely to do so closer to their travel dates than those booking vacation rentals. **Hotel brands can leverage this last-minute activity** by targeting travelers who are ready to hit the road soon.
SECTION 5

The Data Behind the Report

Methodology and about the author
Methodology

This report is grounded in multiple data sets:

- Research conducted from **October 2021 to August 2022** among roughly **2,200 U.S. adults** per survey.

- Data from a **July 2022** survey of **14,000 total adults** in Australia, Brazil, Canada, China, France, Germany, India, Italy, Japan, Mexico, Russia, South Korea, Spain and the United Kingdom.

- “Return to Normal” trend data leveraged from **weekly surveys of 2,200 U.S. adults each.**

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 margins of error of up to +/-3 percentage points.
**Methodology**

**Morning Consult Brand Intelligence**

Morning Consult helps you understand your brand, competitors and market in a way traditional research firms can’t. We survey tens of thousands of people across the globe on over 4,000 brands and products every day. Get actionable insights into what consumers think, see and say about your brand and products.

**Morning Consult Economic Intelligence**

The U.S. Consumer Spending and Personal Finances Survey is intended to gauge consumer spending patterns and the health of household balance sheets. The survey is conducted monthly among a representative sample of 2,200 U.S. adults. It was first run in September 2020, with additional questions added for subsequent versions. Data is collected during the first week of each month, with questions pertaining to the previous month.
ABOUT THE AUTHOR

Lindsey Roeschke is the travel & hospitality analyst at global intelligence company Morning Consult, where she leads efforts to deliver real-time insights for decision-makers in the industry.

Prior to joining Morning Consult, she served as a director of consumer and 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 advertising world. She has lived and worked in six cities across three 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.

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Stay up to date on the latest travel data

Morning Consult tracks travelers’ behaviors, attitudes and expectations through a monthly survey of roughly 2,200 U.S. adults. New data and analysis is available each month via our Smart Journey Tracker.