

2022 | Q1

Travel Trend Report





Rebuilding Tourism for the Future

In our last two reports, we highlighted trends related to the industry's ongoing recovery and the resilience of both travelers and brands in response to an unpredictable travel climate. As we look back on the first quarter of the new year and forward to the months ahead, we're optimistic about what the remainder of 2022 has in store. It's shaping up to be a year of rebuilding and sustained growth, as evidenced by rising travel intent—Q1 global search volume was up 25% quarter-over-quarter and 75% year-over-year—as well as lengthening search windows, an intent to take more vacation days (and even splurge), and consumer interest in sustainable travel.

In this 2022 Q1 report, we share a snapshot of the latest quarterly trends, gathered from more than 70 petabytes of exclusive Expedia Group first-party data and custom research. Throughout the year, we will continue to share data and insights on evolving traveler behaviors and attitudes to help our partners and the industry rebuild and capture travel demand. [Connect with us](#) any time for more specific data on your region and destination, and [subscribe to our blog](#) for more trends and regional insights.

Let's dive into the top trends from the first quarter of 2022.



JENNIFER

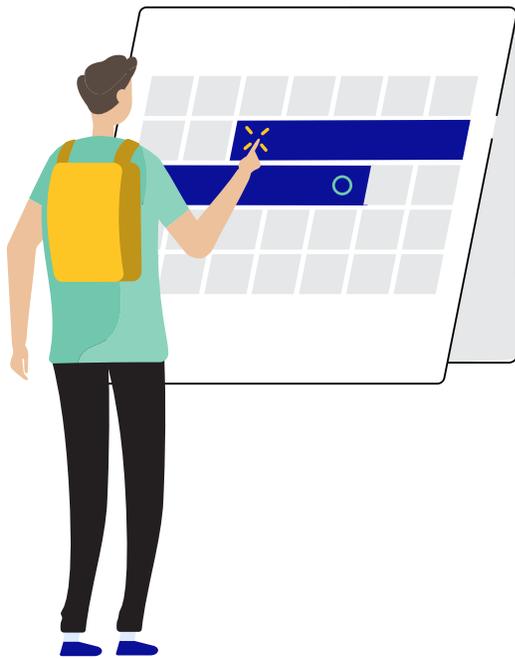
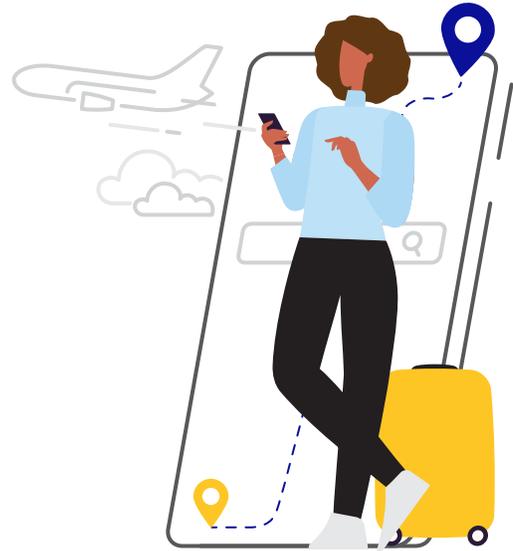
Andre

Global Vice President
Expedia Group Media Solutions

2022 | Q1 Snapshot

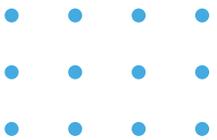
Travel Searches Surge as Restrictions Ease

With a new year comes new enthusiasm for travel, as evidenced by the lift in global searches. Q1 global search volume was up 25% quarter-over-quarter, led by NORAM (30%) and EMEA (25%). A prior-year comparison further illustrates strong recovery, with global search volume up 75% year-over-year compared to Q1 2021.



Growing Traveler Confidence = Longer Search Windows

Growing traveler confidence contributed to lengthening search windows in Q1, with global share of searches in the 180+ day search window increasing 190% and the 0- to 21-day search window decreasing 15% quarter-over-quarter. Regionally, shorter search window share in APAC and LATAM held steady between Q4 2021 and Q1 2022, while EMEA and NORAM travelers searched further out.



2022 | Q1 Snapshot

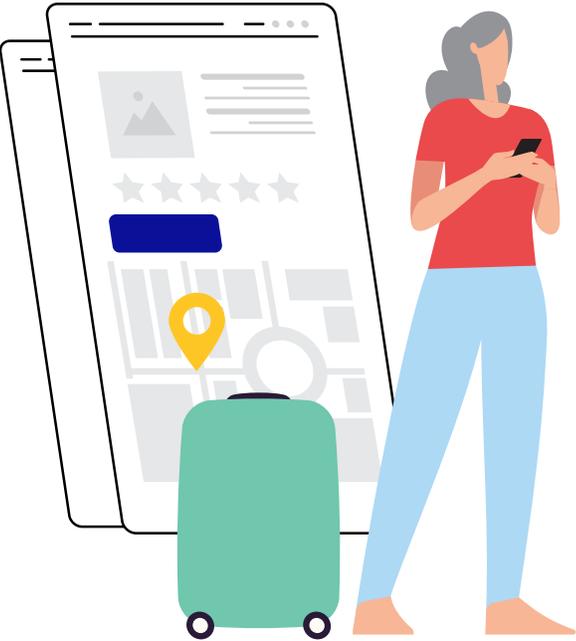
Big Cities & Beaches Maintain Appeal

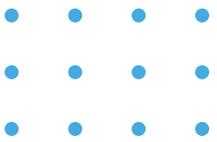
Major cities such as Las Vegas, New York, Chicago, and London remained popular with travelers and made the global top 10 list of booked destinations in Q1, along with beach destinations like Cancun, Punta Cana, Honolulu, and Miami.



Lodging Performance on the Rise

Global lodging bookings for hotels and vacation rentals combined were up 35% quarter-over-quarter, and all regions experienced at least double-digit growth. During Q1, 15 of the top 25 global destinations saw double-digit growth in hotel bookings quarter-over-quarter. Globally, vacation rental night counts grew substantially quarter-over-quarter.

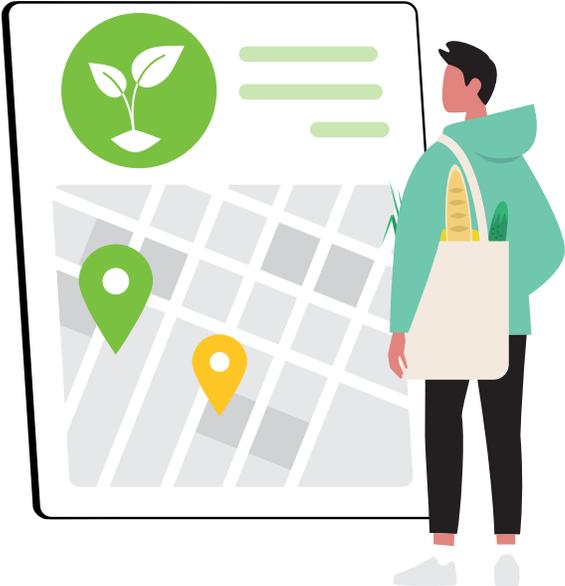




2022 | Q1 Snapshot

Growing Demand and Opportunity for Sustainable Tourism

Consumers around the world are making more mindful decisions when traveling and looking for sustainability information from trusted travel resources and providers. According to our [recent study](#), two-thirds of consumers want to see more information on sustainability from lodging and transportation providers, and half want to see this information from destination or tourism boards.



Travel Searches Surge as Restrictions Ease

With a new year comes new enthusiasm for travel, as evidenced by the lift in global searches. During Q1, global search volume was up 25% quarter-over-quarter, led by double-digit growth in NORAM (30%) and EMEA (25%). Search volume in APAC and LATAM was relatively flat compared to the prior quarter.

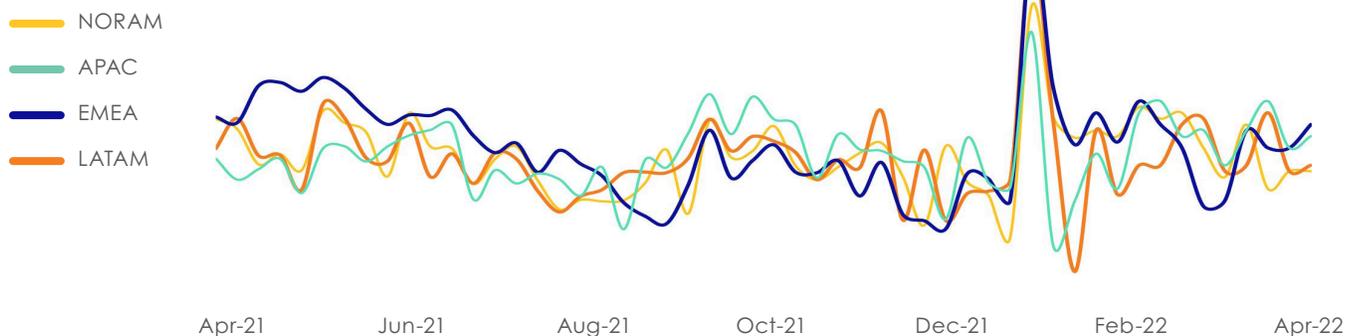
Data from Expedia's [2022 Vacation Deprivation study](#) further illustrates the pent-up demand and desire to get away this year. On average, working adults around the world plan to take nearly 21 days of vacation this year – 3 more days of vacation than they took in 2021.

A prior-year comparison further illustrates strong recovery, with global search volumes up 75% year-over-



Q1 | 2022

Destinations Super-Regions | WoW Search % Change



Source: Expedia Group data, Q2 2021 -Q1 2022

year compared to Q1 2021. All regions saw a year-over-year lift, with EMEA search volume up 165%, NORAM up 70%, LATAM up 50% and APAC up 30%.



Q1 global search volume increased 25% quarter-over-quarter and 75% year-over-year

Global Search Trends

Week-over-week search volume fluctuated throughout Q1. During the first few weeks of the quarter, both LATAM and APAC experienced dips of 15% to 20%, respectively, before leveling off. During the week of February 14, all regions saw week-over-week growth, following changes and announcements related to vaccine and mask mandates around the world, including the U.S. and Europe.

Domestic Searches

With more travelers considering a trip abroad, domestic search performance varied by region during Q1. LATAM domestic searches decreased 25% week-over-week during the week of January 10 but increased more than 10% week-over-week in mid-February and again in mid-March.

International Searches

Throughout Q1, global international searches were steady week-over-week, resulting in positive search growth during 14 of the 15 weeks. Although international searches were stable across other regions, APAC experienced week-over-week volatility, including a 20% lift in searches during the weeks of February 7 and March 14.

Research Spotlight

Vacation Deprivation and the Pent-up Leisure Demand for 2022

Working adults in the U.S. plan to take an average of 14 days of vacation this year, just 1 more day than they took in 2021—and the fewest number of days across all countries surveyed—but they are prepared to spend more to make the most of their time off. Americans are more likely than most other regions around the world to splurge on upgrades such as a larger room, flying first class, or visiting multiple destinations. This is positive news for the leisure travel industry, and an opportunity for travel marketers to promote discounted upgrades or premium product offerings to an eager and engaged audience.

Travelers in APAC and EMEA, including Taiwan, France, and Germany, plan to take the most vacation days in 2022, with Taiwan topping the list at 36 days.

Vacation Days Taken in 2021 vs. Planning to Take in 2022

	 USA	 CAN	 MEX	 FRA	 UK	 GER	 IT	 SG	 AUS	 HK	 NZ	 JP	 KR	 MY	 TW	 TH
Taken in 2021	13	16	13	27	21	26	21	12	14	12	13	26	13	15	34	14
Planning to Take in 2022	14	20	16	30	24	28	24	16	18	15	18	27	15	17	36	15



Growing Traveler Confidence = Longer Search Windows

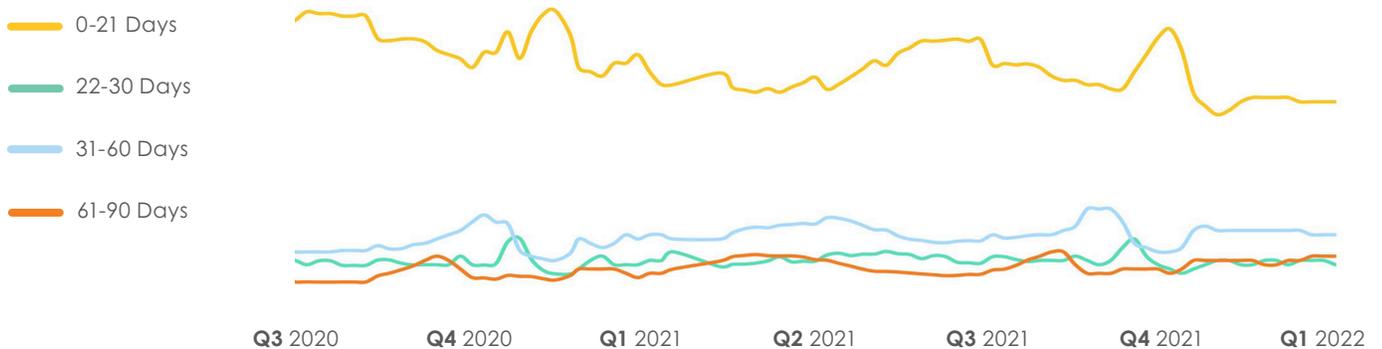
With traveler confidence on the upswing, Q1 saw lengthening search windows. Global share of searches in the 180+ day search window increased 190%, while the 0- to 21-day search window decreased 15% quarter-over-quarter.

Regionally, shorter search window share in APAC and LATAM held steady between Q4 2021 and Q1 2022, while EMEA and NORAM travelers searched further out, with the 91- to 180-day search window increasing 140% and 60%, respectively. The lengthening search windows in these regions is another indicator that summer travel demand in the Northern Hemisphere may surge in 2022.



2020-2022

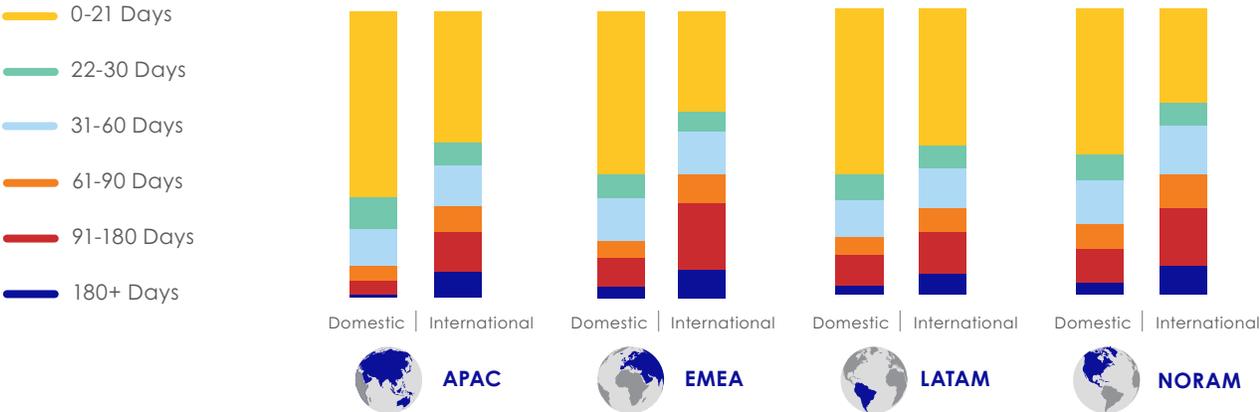
Global Traveler Search Windows | Week over Week % Change



Source: Expedia Group data, Q3 2020-Q1 2022

Q1 | 2022

Super Region Search Window Domestic vs. International



Source: Expedia Group data, Q1 2022

Domestic Search Window

In Q1, 60% of global domestic searches fell within the 0- to 30-day window, a 10% decrease compared to Q4, while the share of searches in 91- to 180-day window increased 80% quarter-over-quarter. Following the global trend, EMEA and NORAM domestic searches in the 0- to 21-day window decreased, shifting share primarily to the 91- to 180-day window, which increased 225% (EMEA) and 70% (NORAM) quarter-over-quarter. APAC and LATAM remained relatively stable from Q4, though both regions saw a slight increase in searches for the 180+ day window.

International Search Window

With shoppers considering or preparing for mid-year holidays, travelers around the world are

searching further out for international trips. Global international search share for the 91- to 180+ day window increased 35% quarter over quarter, with the 91- to 180-day window seeing the largest gains. All four regions experienced similar growth in the 91- to 180-day international search window, with EMEA posting the strongest gains at 110% quarter-over-quarter growth, followed by APAC at 40% growth.

EMEA
international searches 91 to 180 days out increased 110% quarter-over-quarter

Big Cities & Beaches Maintain Appeal

Major cities such as Las Vegas, New York, Chicago, and London remained popular with travelers and made the global top 10 list of booked destinations in Q1, along with beach destinations like Cancun, Punta Cana, Honolulu, and Miami. Las Vegas topped the global list, surpassing New York, which held the No. 1 spot in Q3 and Q4 2021. However, for the third consecutive quarter, New York appeared on the top 10 list of booked destinations across all regions.



New intra-regional destinations appeared on the top 10 booked destinations list in each region, including Rome in EMEA and Puerto Vallarta in LATAM. In NORAM, Phoenix was also new

Top 10 Booked Destinations | Q1 2022

*New Top 10 destination



APAC

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



EMEA

London
Dubai
New York
Paris
Barcelona
Istanbul
Copenhagen
Amsterdam
Rome*
Stockholm



LATAM

Mexico City
Cancun
New York
Sao Paulo
Rio de Janeiro
Paris
Playa del Carmen
Madrid
Las Vegas
Puerto Vallarta*



NORAM

Las Vegas
New York
Orlando
Cancun
Los Angeles
Honolulu
Miami
Chicago
Punta Cana*
Phoenix*

Source: Expedia Group data, Q1 2022

to the list, along with a new destination outside the region: Punta Cana. In APAC, destinations within Australia experienced strong quarter-over-quarter growth. Sydney moved up the list from No. 4 to No. 3 and both Melbourne and Surfers Paradise entered the top 10 list, at No. 5 and No. 10, respectively.

Trending Countries

Following extended border closures in 2021, Canada saw positive gains throughout Q1. The country experienced the largest increase in searches and bookings, as both an origin country and a destination country. Compared to January 2022, inter-province searches were up 75% in March 2022, and bookings up 150%. Travelers from America's northern neighbor also

searched internationally, with searches from Canada to the U.S. growing by triple digits during Q1. In a reciprocal trend, Q1 bookings from the U.S. to Canada increased 155% during the quarter.

Trending Cities

Globally, Paris surged in popularity during Q1, with bookings increasing 75% between January and March. In APAC, Sydney and Melbourne saw significant increases, along with Osaka. And Guadalajara saw a rise in LATAM.



Lodging Performance on the Rise

Building on the strong performance seen in Q4, global lodging bookings for hotels and vacation rentals combined were up 35% quarter-over-quarter. All regions experienced at least double-digit growth, with the strongest quarterly growth in EMEA (150%) and LATAM (75%).

Global lodging length of stay held steady between Q4 2021 and Q1 2022, at 2 days for hotel stays and 5.5 days for vacation rental stays. On a regional basis, both NORAM and EMEA saw the largest increases in stay duration across different lodging types. In NORAM, the hotel length of stay increased slightly, while vacation rental stays were consistent quarter-over-quarter at just over 5 days. In EMEA, the average length of stay for vacation rentals increased from 7 days to nearly 7.5 days, while hotel stays also lengthened moderately.

Strong Room Night Demand Growth

During Q1, 15 of the top 25 global destinations saw double-digit growth in hotel demand quarter-over-quarter. Punta Cana saw the highest quarter-over-quarter growth at 70%, with strong performance in other



LATAM destinations including Cancun (40%) and Playa del Carmen (35%). Barcelona moved from the 31st position to 22nd, Kissimmee (near Orlando) moved from 29th to 20th, and Honolulu moved from 12th to 7th.

Domestic Travelers Flock to Vacation Rentals

With both winter breaks and spring vacations occurring during Q1, vacation rentals had another positive quarter, with substantial quarter-over-quarter growth in vacation rental night counts. Domestic travel continued to dominate

the vacation rental space, with Australia, France, Brazil, and the U.S. being the top booked countries for their respective regions.

In all regions, popular beach and warm weather destinations were the top choices for vacation rental bookers. Kissimmee, Florida, was again the top vacation rental destination for EMEA bookers and made the top booked destination list for LATAM travelers (No. 9) and NORAM travelers (No. 2).

Kissimmee, Florida, appeared on the top 10 Vrbo booked destinations list for EMEA, LATAM, and NORAM travelers

Top 10 Vrbo Booked Destinations | Q1 2022

*New Top 10 destination



APAC

Cowes, Australia
 Surfers Paradise, Australia
 Dunsborough, Australia
 Port Douglas, Australia*
 Jindabyne, Australia*
 Noosa Heads, Australia
 Rye, Australia
 Noosaville, Australia*
 Culburra Beach, Australia
 Sorrento, Australia



EMEA

Kissimmee, Florida
 Porto-Vecchio, France
 Paris, France
 Playa Blanca, Spain
 Nice, France*
 Davenport, Florida
 Gérardmer, France
 Antibes, France*
 Arcachon, France*
 Albufeira, Portugal*



LATAM

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



NORAM

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

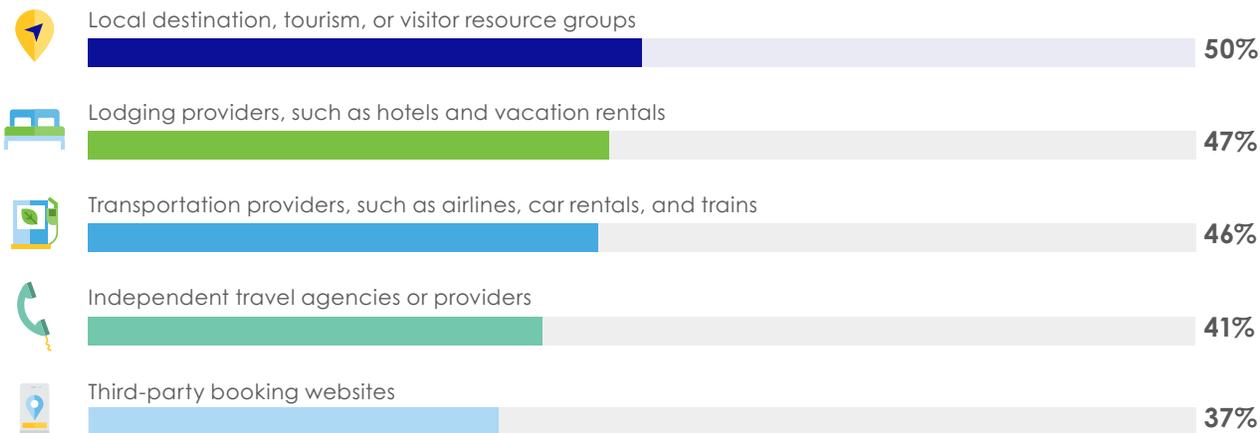
Source: Expedia Group data, Q1 2022

Growing Demand and Opportunity for Sustainable Tourism

Consumers around the world are already making more mindful decisions when traveling, such as opting for more eco-conscious and sustainable offerings, and more want to do so in the future. However, many feel overwhelmed by starting the process of becoming more sustainable travelers, and are looking for sustainability information from trusted travel resources and providers. Our new study, [Sustainable Travel: Consumer Attitudes, Values and Motivations in Making Conscientious Choices](#), found that two-thirds of consumers want to see more information on sustainability from lodging and transportation



Preferred Sources for Sustainable Travel Information



Source: Sustainable Travel Study, Expedia Group Media Solutions 2022

providers, and half of consumers want to see this information from destinations, tourism boards, or visitor resource groups.

Consumer attention toward sustainable tourism has also resulted in higher expectations for destinations and travel brands. Seven in 10 consumers have avoided a destination or transportation option because they felt it was not truly committed to sustainable practices, illustrating the importance of authenticity and transparency around sustainability commitments and outcomes.

The study also found that half of consumers would be willing to pay more for transportation, activities, and lodging if the option was more sustainable. We looked at Expedia Group data to see how this consumer attitude comes to life for our travelers, specifically performance and review themes for hotels that have signed the [UNESCO Sustainable Travel Pledge](#).

Looking at Q1 bookings for the nearly 4,300 hotels that have signed the pledge (as of March 16, 2022) compared to unpledged hotels, pledged hotels have a higher ADR and longer length of stay than the global average across Expedia Group points of sale.

Campaign Spotlight

THE UNESCO SUSTAINABLE TRAVEL PLEDGE

The [UNESCO Sustainable Travel Pledge](#) aims to promote sustainable travel, community resilience and heritage conservation globally. By signing the Pledge, properties publicly commit to actions that will reduce the environmental impact of their businesses, raising awareness to travelers and helping them make more sustainable travel choices.



Across Q1 bookings for properties that have signed the pledge, hotels were the most popular, followed by all-inclusive properties, and then resorts. Pledged all-inclusive properties saw the largest share increase from Q4, up nearly 5% quarter-over-quarter. Heading into 2022, pledged hotels saw stronger week-over-week demand than non-pledged hotels. Globally, pledged hotels saw a nearly 25% increase in week-over-week bookings, compared to a 15% increase for non-pledged hotels.

Throughout the past two years of COVID recovery, we've been able to better understand traveler attitudes by monitoring the sentiment and themes surfacing in our lodging guest reviews. Early on, we saw an increase in hygiene and cleanliness references, illustrating tangible changes in traveler expectations. In our [Q2 2021 report](#), we highlighted top mentions related to the environment, such as single use plastic and electric car charging. Now, we're using those same data analysis capabilities to uncover differences in how travelers engage with pledged hotels.

Analysis of Expedia Group guest review data reveals that

room, location, and room amenities are the most mentioned topics for all hotel reviews. However, when comparing pledged and non-pledged hotels, pledged hotels have a higher aggregated sentiment among most topics, as well as a more positive sentiment on topics such as room, recreation and public areas. We'll continue to monitor guest reviews for these pledged hotels to learn more about how our travelers are engaging with sustainable offerings in the industry.



Half of consumers would be willing to pay more for transportation, activities, and lodging if the option was more sustainable

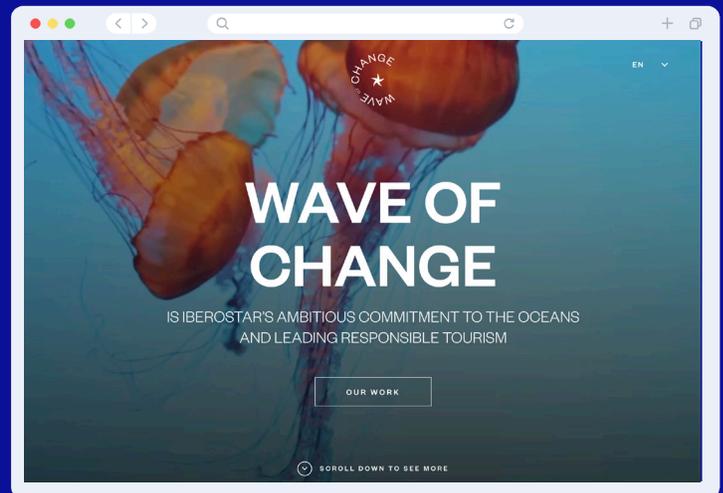
Campaign Spotlight



IBEROSTAR GROUP

With 80% of its properties located on the seafloor, Iberostar Group takes a keen interest in the health of the world's oceans and the local communities where the company operates. This is one of the concerns that prompted the brand to sign the UNESCO Sustainable Tourism Pledge in 2021. Iberostar's commitment to the UNESCO Pledge is exemplified by the company's [Wave of Change](#) initiative, and specifically its support for work to protect and restore the Mesoamerican Reef, a unique and delicate marine habitat with proximity to many Iberostar property locations.

In addition to these actions, Iberostar partnered with Media Solutions and our Creative Partnerships team on the [Discover Iberostar](#) campaign, which educates travelers about the Wave of Change movement and offers consumers a responsible vacation experience. The interactive campaign features stunning images and thoughtfully curated



Iberostar's [Wave of Change](#) initiative

information designed to inspire users to make more informed decisions on how they travel, and prompts them to consider their impact on destinations.

The comprehensive five-month campaign helped drive year-over-year demand for Iberostar and delivered more than 14.5 million impressions, nearly 23,500 clicks and had a return on ad spend (ROAS) of more than 45:1. Furthermore, the campaign creative featuring a call to action for the Wave of Change initiative delivered a higher ROAS than the destination-led creative.





Looking Forward

Awaiting the Return of Business & Bleisure Travel

Travel recovery to-date has been led by domestic travel—primarily leisure travel—but, like all of you, we are eager for the return of business travel. This includes conferences and conventions – and blended travel (sometimes known as “bleisure,” “flexcations,” or “workcations”). In our Q3 2021 report, we found that business travel demand was up more than 40% quarter-over-quarter, and up more than 110% compared to Q3 2020, but still below 2019 levels. Looking at directional data from Q1, searches for “business friendly” lodging (properties with amenities to help travelers work comfortably) increased more than 65% between January and March.

As companies return to the office and evolve remote work policies, people will look to make greater use of their vacation time and, in some cases, combine work and play. Recent [Expedia Group research](#) shows that 56% of those who often

work remotely will take a bleisure trip in the next 6 months. [Vrbo data](#) also points to families continuing to take flexcations in 2022, with searches for 21-30—day stays on the platform having increased by 68%.

A Strong Summer Season in the Northern Hemisphere

[Recent Vrbo data](#) indicates that summer vacation home bookings are trending earlier than ever, even outpacing the unprecedented demand seen in 2021. As of January 31, demand for U.S. Vrbo properties this summer is already outpacing summer 2021 by nearly 15%, and some of the most popular summer vacation destinations, such as those in New Jersey and North Carolina, already have more than 70% of properties booked for July. And unlike last year, when travel restrictions and testing requirements made international travel logistics confusing or overwhelming, travelers from abroad are planning trips and booking U.S. vacation rentals. International demand for Vrbo vacation homes in the U.S. this summer from travelers in countries such as the UK and Germany has returned to near pre-pandemic levels.

Ready to get started?

For more specifics on our traveler data and insights, and how we can help with recovery, **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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