

The experience economy endures

2023 Deloitte summer travel survey



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Methodology

A representative sample of 3,583 Americans took this survey between March 31 and April 6, 2023. Of those, 2,262 qualified as travelers. A smaller subset of 1,957 respondents, who plan to stay in paid lodging, rather than only with friends and relatives, completed the longest version of the survey. Please refer to source lines for clarification on questions asked and sample sizes.

Throughout the report, readers will notice several references to travelers' longest trips or **marquee summer trips**. Because most travelers will take multiple trips across the season, including a mix of family visits and adventures in new destinations, it is useful to delve into their longest trip. Travel behaviors across the season, combined with patterns and preferences for the longest trip, can provide a more comprehensive view of travel decisions and purchase trends.

Key findings

Higher prices generally don't deter vacations as revenge travel continues

Despite rising travel prices and a year of persistent inflation, more Americans are traveling this summer compared to last. And many are squeezing in some extra trips too.

Americans haven't forgotten the years spent on the travel sidelines. Pent-up demand is likely to continue to shape the 2023 summer season.

One in five travelers say their summer getaways are fueled by trips lost during the pandemic.

Roughly one in four say they're spending more this summer compared to last. Among them, nearly a third didn't travel last summer.

More trips and more travelers, spreading spend and travel days across the season

With many travelers looking to take more trips this summer, the pressure is off to make marquee trips (longest summer trip) as epic as last year.

While trip frequency trends up, trip spend and trip duration of marquee trips are down compared to 2022.

Marquee trip spend has been declining since 2021. And there are likely a few contributors to the trend. Most importantly, **as leisure travel continues to rebound, more Americans are traveling again—not just the avid travelers who continued to travel during the pandemic.**

Key findings (cont'd)

More flying ... and flying further, and air travelers seek reliability as much as deals

International travel is a major bright spot. **Twenty-two percent of summer travelers plan to take at least one international flight this summer—up from 14% in 2022.**

And instead of sticking to closer destinations like Mexico or the Caribbean, more international travelers are planning to make the jump to Europe.

Reliability is rivaling price among air shoppers. While last summer's flight cancellation fiasco isn't deterring Americans from taking summer trips and international getaways, reliability is likely to be top-of-mind when choosing an airline.

Financial stress is taking some toll on travel spending—but climate change worries might not be

Prolonged inflation has taken its toll on consumers' wallets. **One in four summer travelers feel financially worse off compared to last year.**

While they've made the decision to take a trip, those feeling financially worse off are finding ways to be thrifty.

Most of those feeling the financial burden aren't planning to squeeze in an extra summer getaway—but they're making an effort to protect their marquee trips.

While finances might be dragging down summer spending, there isn't much evidence that climate change sentiment is having a similar impact.

2023 summer travel outlook



Summer blast

Signs point to a busy summer, as pricing pressure does not deter Americans from planning travel

With a few exceptions, leisure travel intent has increased consistently since May 2021, and the trend continues this year: Summer 2023 is poised to improve on an already buoyant summer 2022.

Half of Americans surveyed say they will take a leisure vacation (involving a stay in paid lodging) this summer, up from 46% in 2022. And they are doing so with enthusiasm, taking more international flights and adding an average of one trip to their calendar. Still, some say they will stay home due to financial concerns (cited by 50% of nontravelers).

The specter of COVID-19 is still driving some revenge travel. One in five travelers are planning their marquee summer trip to make up for travel they missed out on during the pandemic. And among those likely to spend more than in 2022, nearly three in 10 are making up for missed travel (28%) or taking a bucket list trip (32%).

Even if concerns about the travel experience linger, they do not seem to be keeping people at home. The possibility of disruption in the form of delayed or canceled flights was cited by just 6% of nontravelers, a huge drop compared to 18% over the winter holiday season. Health worries were already on the decline in summer 2022, and this year they are barely influencing plans (health risks were cited by 8% of nontravelers in 2023 vs. 33% in 2022).

Compared to 2022, when the omicron variant affected the first few months of the year, the COVID-19 situation has been stabler in 2023, and few international entry and exit health restrictions remain. With greater confidence and certainty, the US traveler pool has expanded. Many are taking long-delayed dream trips, but even more are planning to add short getaways during the season. This could signal healthy demand for more mass-market travel products, such as major attractions and limited-service hotels.

Overall, Americans are finding room in their budgets for the adventure, discovery, and relaxation that travel can provide. Whether they are making up for lost time, spending down savings, or placing high value on experiences and memory-making, Americans continue to find reasons to prioritize travel.

Half of Americans are planning leisure trips this summer—up slightly from last year

50%

Taking a leisure trip that includes paid lodging this summer vs. 46% in 2022

Questions: (1) What activities are you planning to partake in during summer 2023 (between Memorial Day and the end of September)?

(2) Across travels this summer, will you ...

Note: N = 3,583.

Source: 2023 Deloitte summer travel survey.

Among those not planning travel, half cite affordability.

2023 summer travel plans

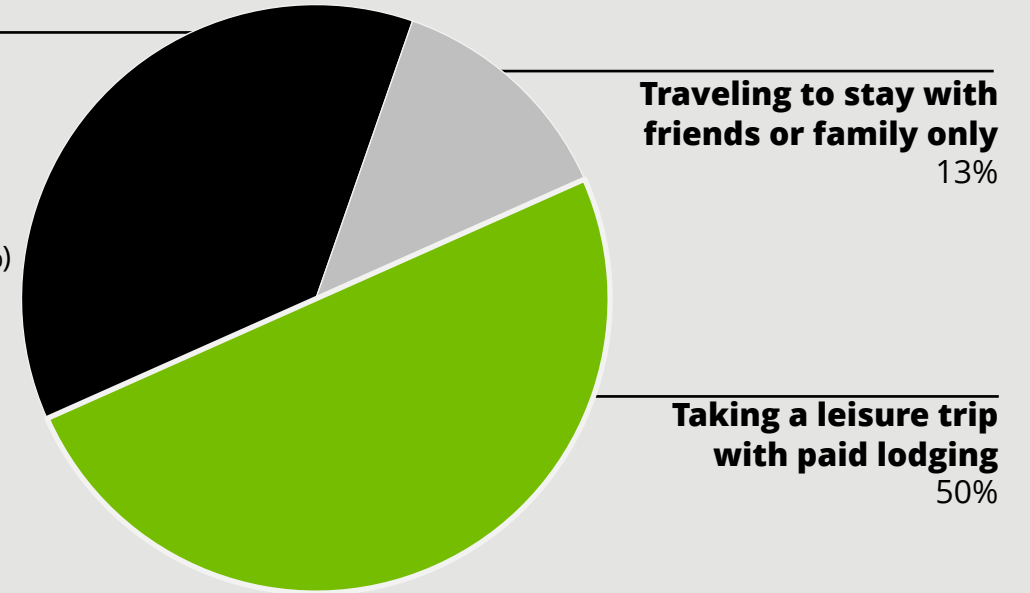
Not traveling
37%

Top 5 reasons for not traveling, 2023

1. Cannot afford it (50%)
2. Travel is too expensive right now (24%)
3. No destination in mind (16%)
4. Rather spend on other things (16%)
5. Plan to travel after the summer (11%)

Top 5 reasons for not traveling, 2022

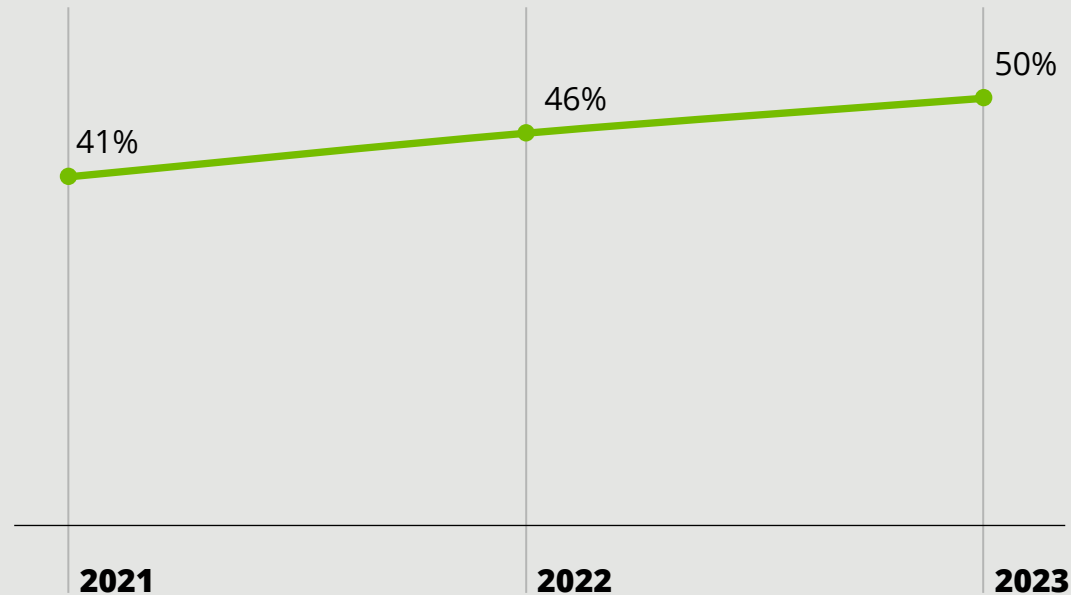
1. Financial concerns (44%)
2. Health concerns (33%)
3. Waiting for pandemic to end (24%)
4. Rather spend on something else (19%)
5. Pandemic restrictions (13%)



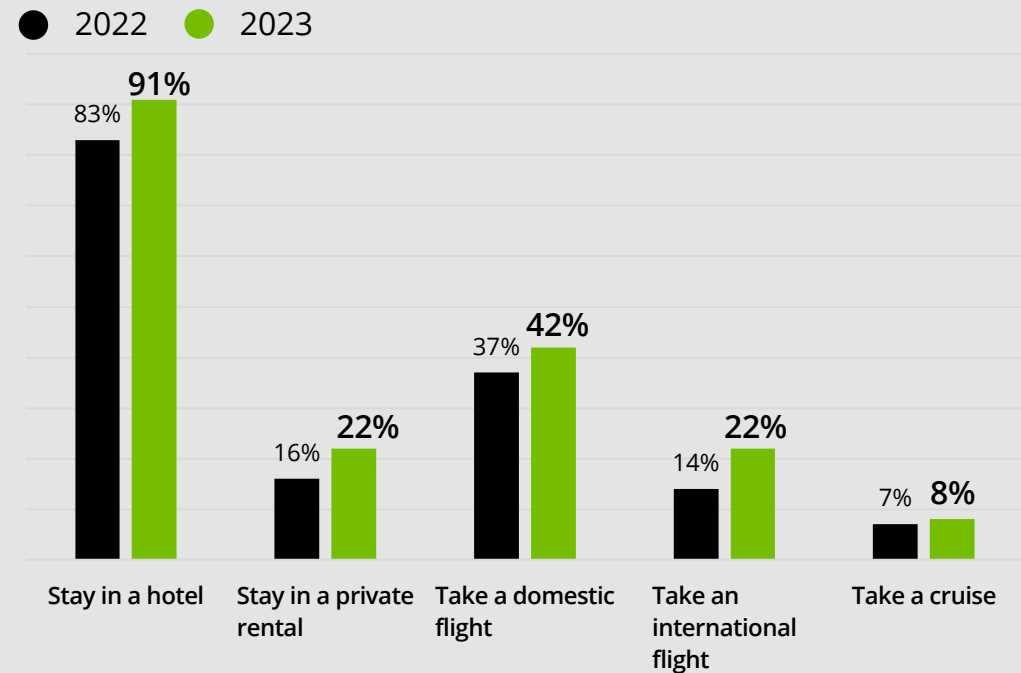
More summer travelers ... and more bookings

The number of Americans taking summer trips has been steadily recovering since 2021. And compared to last year, booking intentions are up across all major segments—particularly international flights.

Share of Americans traveling this summer and staying in paid lodging



What travel activities will you partake in across all your leisure trips this summer?



Questions: (1) What activities are you planning to partake in during summer 2023 (between Memorial Day and the end of September)? (2) Across travels this summer, will you ...

Note: N = 1,957.

Source: 2023 Deloitte summer travel survey.

Travelers are signaling intentions to squeeze in more trips this summer

3.1 trips

(up from 2.3 in 2022)

Additional trips added this year are likely to be shorter. About two-thirds of travelers are planning a long weekend or quick getaway trip.



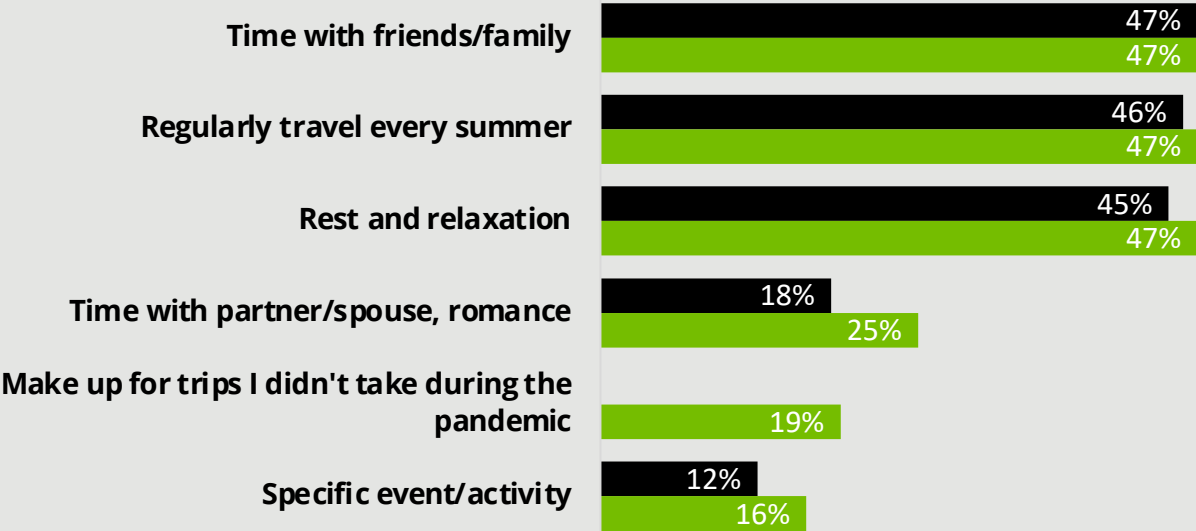
Questions: (1) How many trips will you be taking this summer?
(2) How many of your summer trips will be ... ?
Note: N = 1,957.
Source: 2023 Deloitte summer travel survey.

Built-up pandemic demand is still shaping 2023 summer travel

Roughly one in five say they're taking summer trips to make up for getaways lost due to the pandemic.

● 2022 ● 2023

Top summer travel motivators



Unlikely to change most years, travel is often motivated by time with loved ones, tradition, and relaxation

However, 2023 saw a jump in motivations likely suppressed by the pandemic—like special events and romantic getaways

Question: What motivates you to take this trip? (Select all that apply)
 Note: N = 1,957.
 Source: 2023 Deloitte summer travel survey.

Budgets for marquee summer trips continue to slip—with a few likely drivers

Likely drivers behind the spend downtrend

An expanding traveler pool

Travelers who continued to travel during the pandemic were more likely to be avid, high-spending travelers. As the market recovers, the traveler pool is expanding with more typical spenders. Among the one in four travelers planning to spend more this summer, (compared to last summer), one-third didn't travel last summer (see page 14).

Fewer eggs in one basket

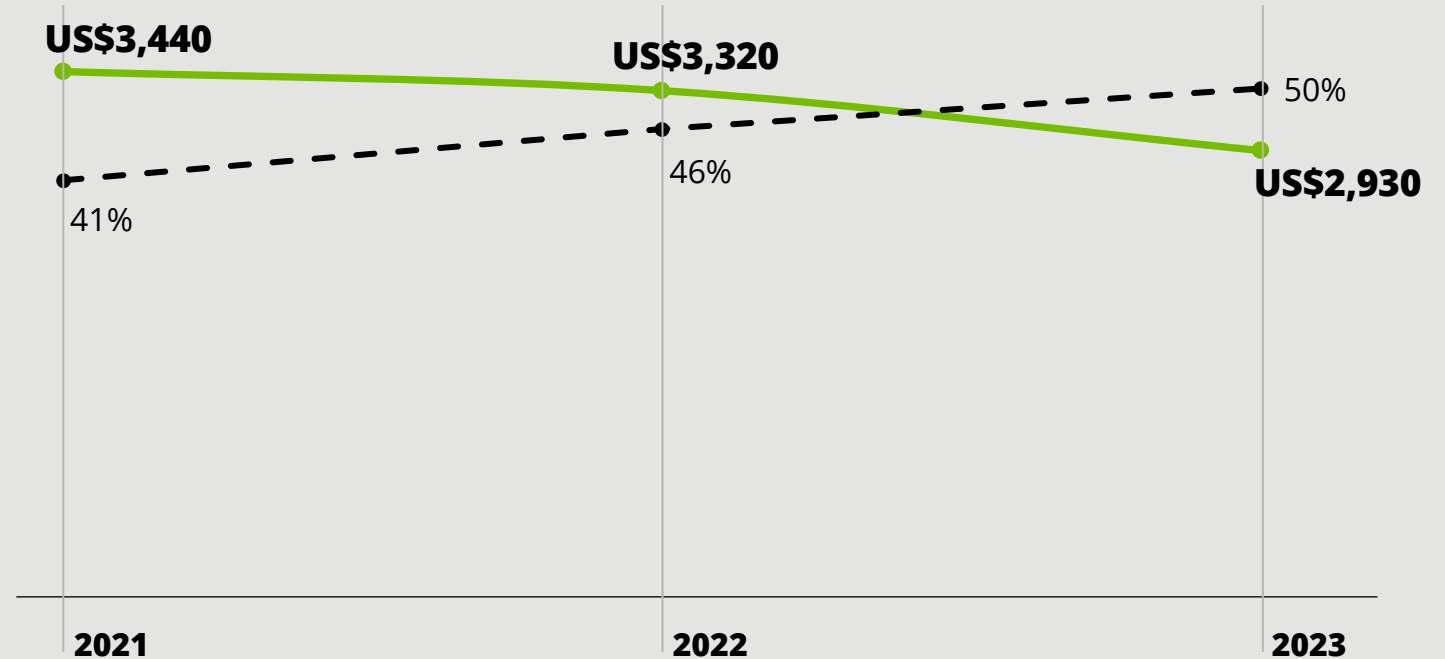
Travelers are looking to take more trips this summer. Accordingly, some of the pressure is off to make marquee summer trips as extensive. Compared to 2022, 2023 marquee trips will likely be a bit shorter (see page 13) and less expensive.

Consumer finances

Travelers aren't flush with pandemic savings like they were in 2021.* For many, prolonged inflation is likely weighing on travel spending decisions. Among the 13% planning to spend less on marquee trips this summer, the majority pointed to their finances and the increased cost of travel (see page 14).

Travelers are planning to spend close to US\$3,000 on their longest trip this summer.

- Estimated budget for marquee summer trip
- - - Percent of Americans taking a leisure trip with paid lodging



*US Bureau of Economic Analysis, personal savings rate.

Questions: (1) What activities are you planning to partake in during summer 2023 (between Memorial Day and the end of September)? (2) How much is the estimated budget for your summer trip? Please include ONLY your transportation and lodging costs in this estimate.

Note: N = 1,957; N = 3,578.

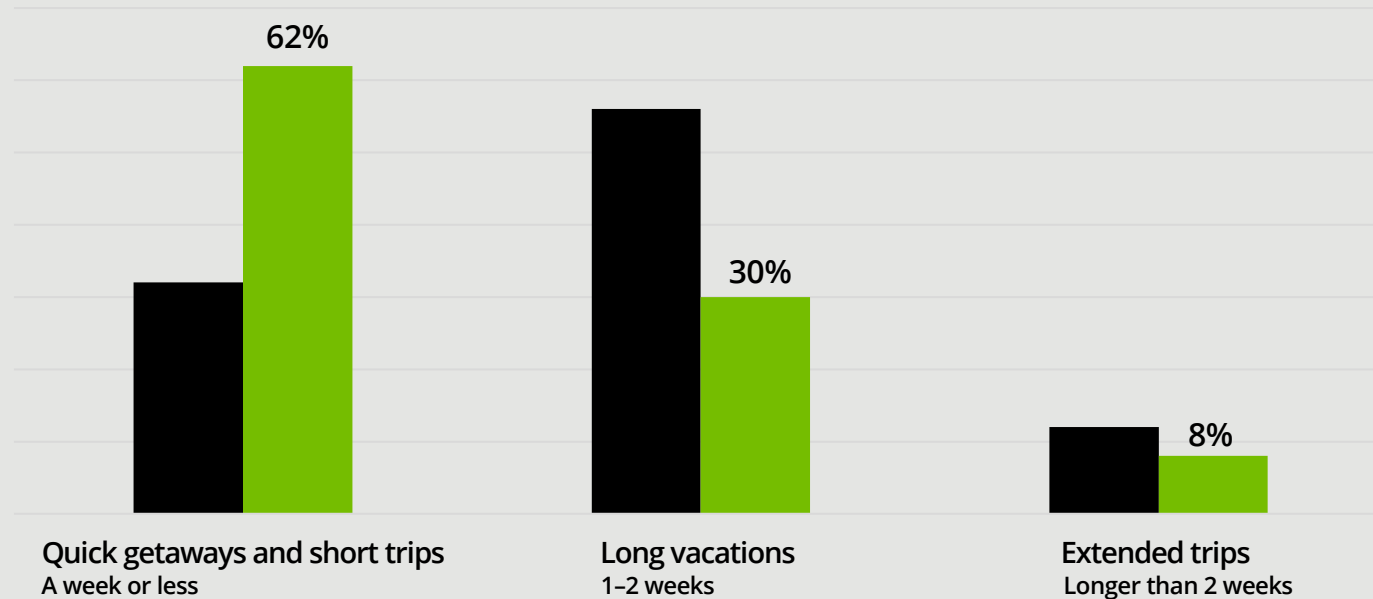
Source: 2023 Deloitte summer travel survey.

Marquee summer trips are likely getting shorter this summer

As travelers plan to squeeze in more trips this summer, marquee trips lose a bit of their weight.

● 2022 ● 2023

Duration of marquee trip



38%

of travelers say their longest trip will last a week or more

down vs. 2022, likely due to Americans taking more trips throughout the season

Question: For this trip, how long will you be traveling for?

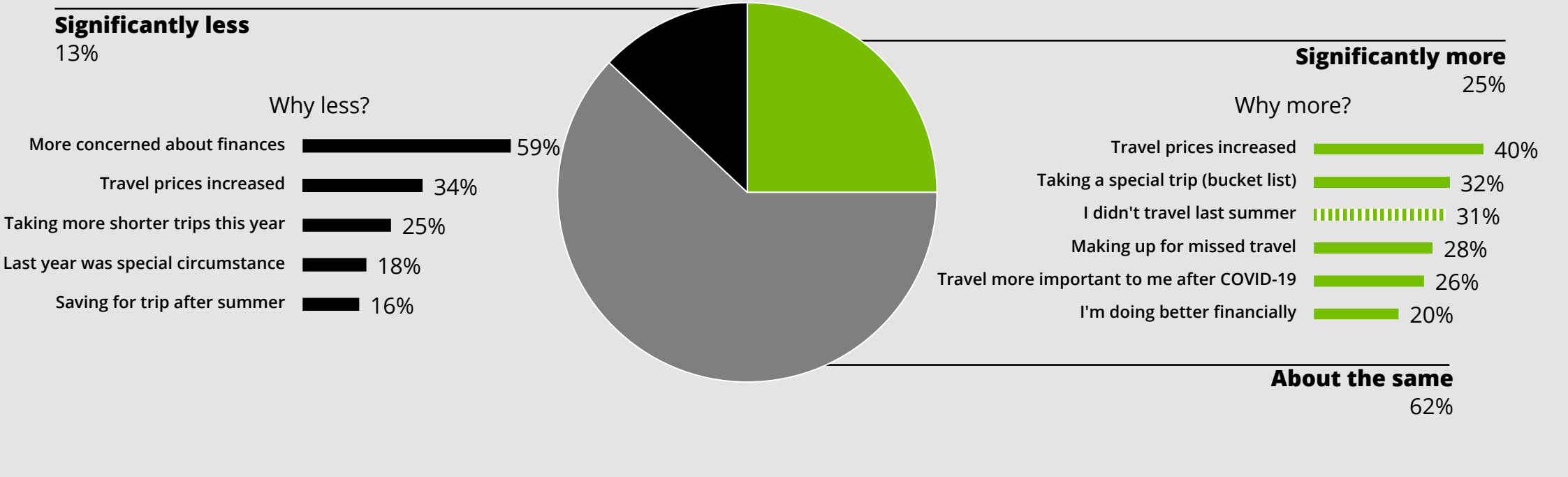
Notes: N = 1,957; 2022 options: less than a week; 1 week; more than 1 week, less than 2 weeks; 2-3 weeks; longer than 3 weeks; 2023 options: long weekend/quick getaway (3 nights or less); short trip/vacation (4-6 nights); long vacation (7-13 nights); extended trip (14+ nights).

Source: 2023 Deloitte summer travel survey.

More plan to boost their summer travel budgets than pull back

But among the one in four spending more, roughly one-third didn't travel last summer.

How does your 2023 trip budget compare to your budget in 2022?



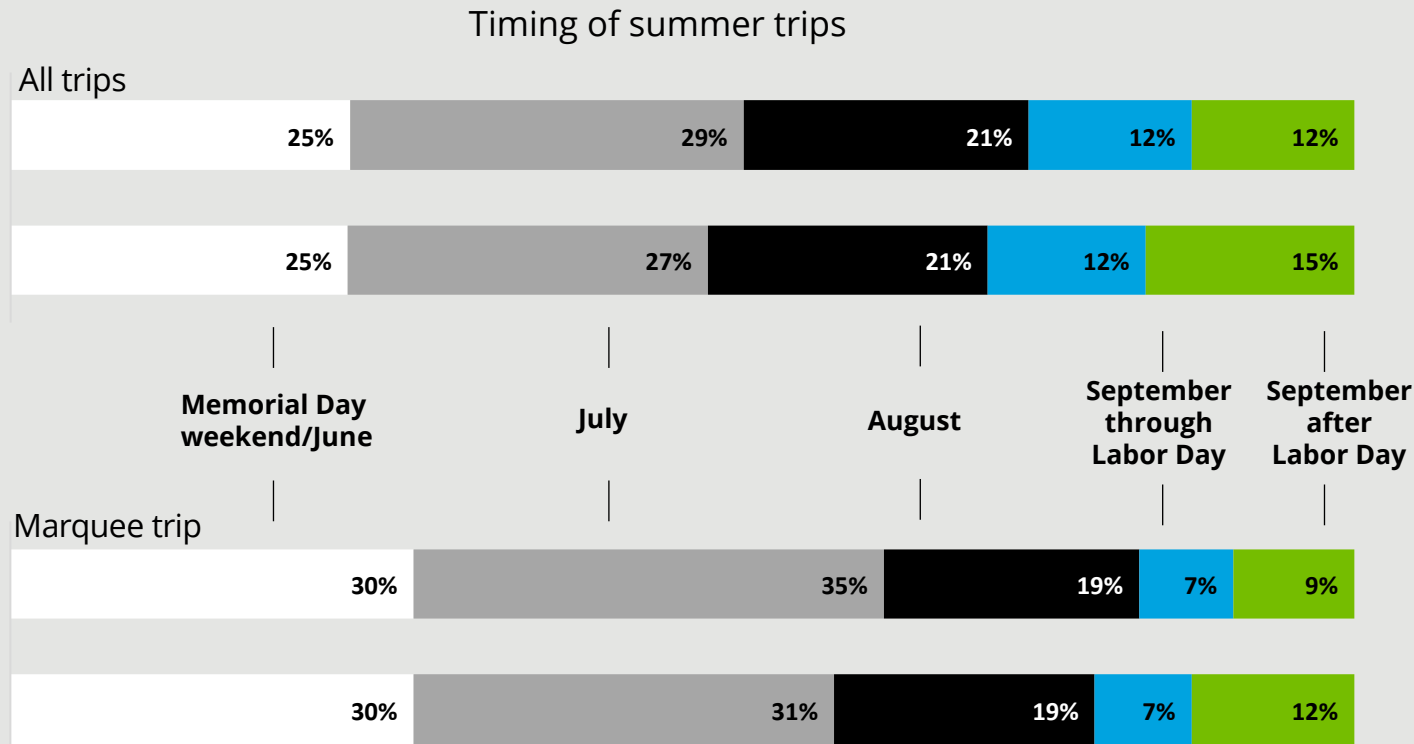
Questions: (1) How does your budget for this trip compare to your budget for your longest summer trip in 2022?; (2) What best describes why you are spending more on this trip than you did on your longest summer trip in 2022? (Please select all that apply); (3) What best describes why you are spending less on this trip than you did on your longest summer trip in 2022? (Please select all that apply)

Note: N = 1,957.

Source: 2023 Deloitte summer travel survey.

Similar to last summer, most marquee trips will take place earlier in the season

With many planning extra trips, more trips are spilling into post-Labor Day, when many destinations are cheaper and less crowded.



61%

Of marquee trips will be taken by July
vs. 65% in 2022

Questions: (1) How many of your summer trips will begin in each of the following time periods?; (2) When do you expect your marquee trip to take place? If your trip spans more than one of the provided dates, select the option that reflects the majority of your trip.

Note: N (all trips) = 2,262; n = 1,957 .

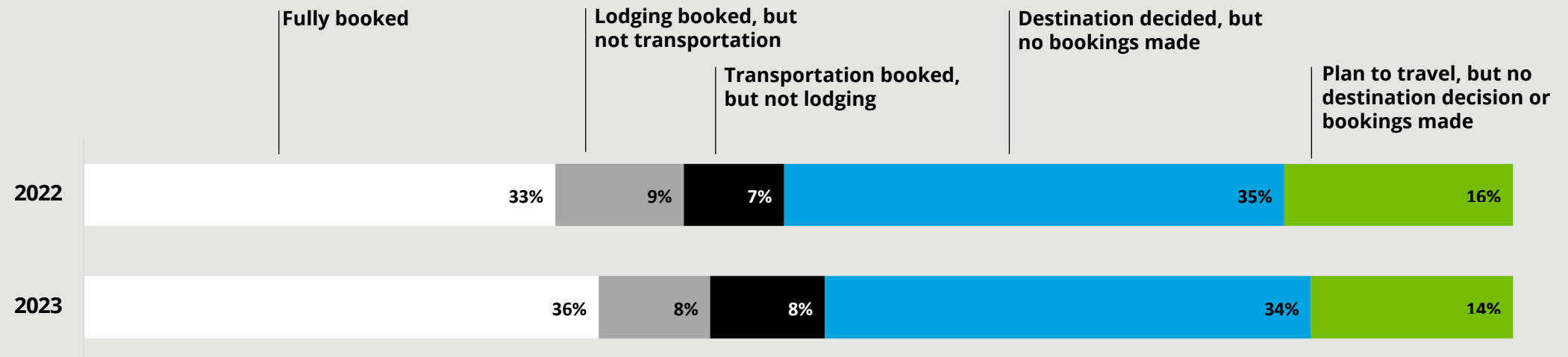
Source: 2023 Deloitte summer travel survey.

Travelers are slightly further along in making bookings for their marquee trips (compared to this time last year); 36% are fully booked

Booking further in advance could reflect more clarity about the near future, or concern about availability or rising prices.

Booking status for marquee summer trip

As of March 2023



Question: Thinking of the longest trip you will take this summer; how would you describe your progress in planning and booking this trip?

Note: N = 1,957.

Source: 2023 Deloitte summer travel survey.



Travel products—transportation, lodging, and activities

Many travel segments look to benefit from strong summer travel intent. Notably, a growing number of travelers are taking advantage of more open, convenient, and predictable overseas travel as most pandemic-related border restrictions have now been lifted.

The share of summer travelers who intend to take an international flight climbed more than 1.5X, from 14% in 2022 to 22% this year. And instead of sticking to closer destinations like Mexico or the Caribbean, more international travelers are planning to make the jump to Europe.

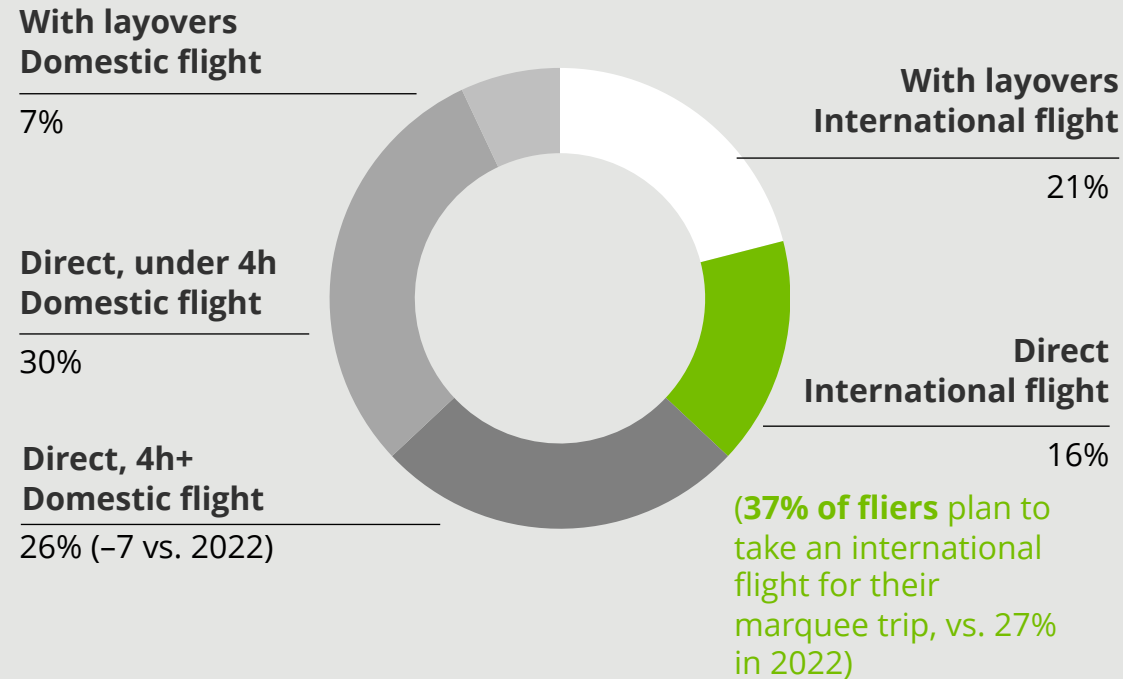
With more taking to the skies, fewer are planning to hit the road. The percentage of summer travelers planning to take at least one road trip (at least 100 miles from home) fell to 53%, down from 64% last summer.

Full-service hotels remain the accommodation of choice for marquee trips. As budgets for marquee trips slipped, slightly more travelers are opting for limited-service hotels compared to last summer, while booking intentions for more expensive destination resorts fell.

More are taking to the skies for their marquee trip, and international flights are up, mostly at the expense of longer domestic itineraries

But fewer flyers are dishing out extra money for seat upgrades and premium fare classes.

51% Plan to take a flight for their marquee trip this summer, up from **47%** last summer



First- or business-class tickets

14%

Tickets with some upgrades

25%

Lowest priced tickets (preferred airline)

38%

Lowest priced tickets (any airline)

23%

4 in 10

Cited paying for a more comfortable flight experience, down from 54% in 2022

(among 27% of travelers who've already booked their summer flights)

Questions: (1) Which of the following best describes your flight?; (2) Which best describes the airfare that you booked?

Note: N = 1,005.

Source: 2023 Deloitte summer travel survey.

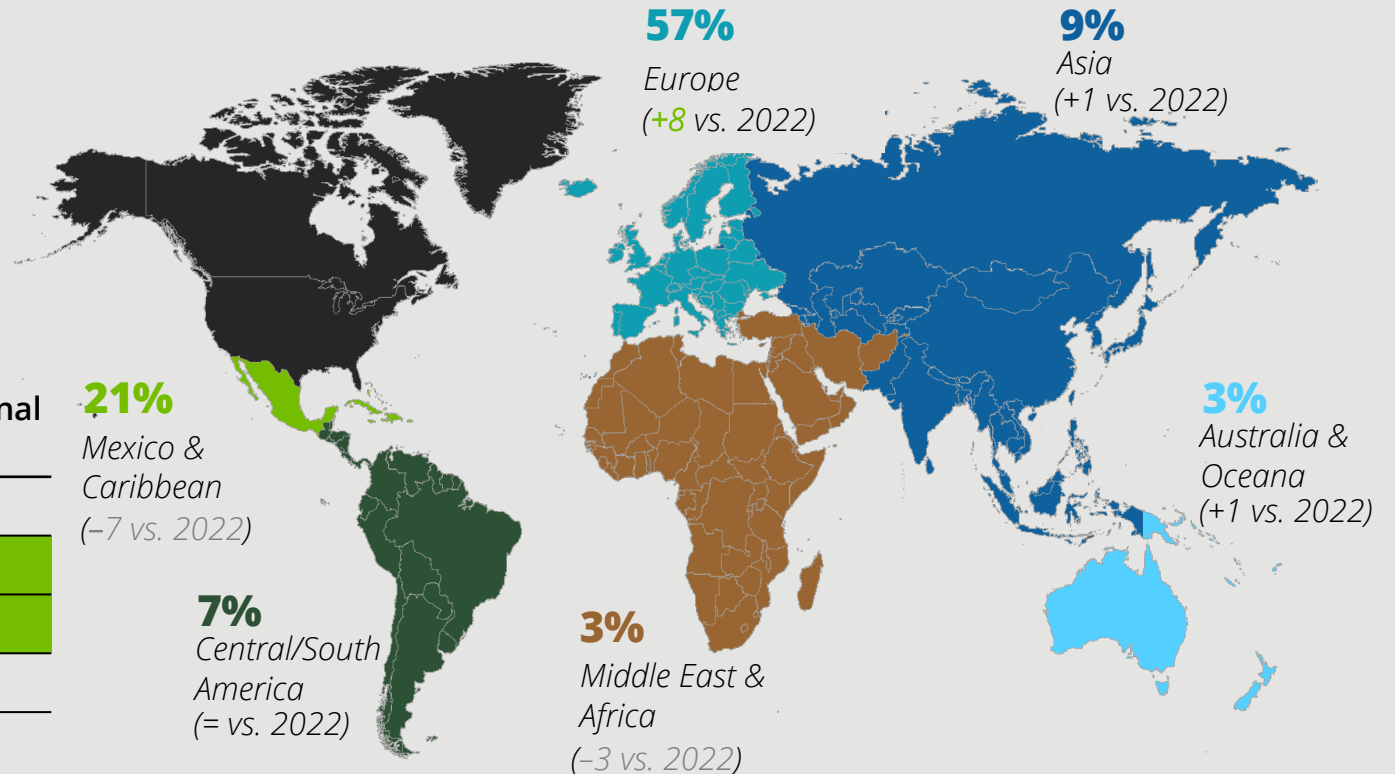
Along with more flyers in general, more are traveling internationally

Significantly more are venturing to Europe, instead of closer international destinations like Mexico and the Caribbean.

37%

of air travelers will fly to international destinations
(+10 vs. 2022)

Summer destination types	Domestic flyers	International flyers
Beaches	34%	29%
Cities	37%	43%
Great outdoors	10%	14%
National or state parks	8%	3%
Theme parks	8%	3%



Questions: (1) Which of the following best describes your flight?; (2) Which international region will you be flying to?; (3) What best describes the destination you will travel to?

Note: N (all air travelers)=1,005; n (international travelers) = 368.

Source: 2023 Deloitte summer travel survey.

Reliability is rivaling price in air purchase decisions

Soon-to-be flyers might have last summer's cancellation and congestion challenges top of mind when choosing an airline

Question: How important were the following factors (or will they be) when choosing what airline to fly with for this trip?

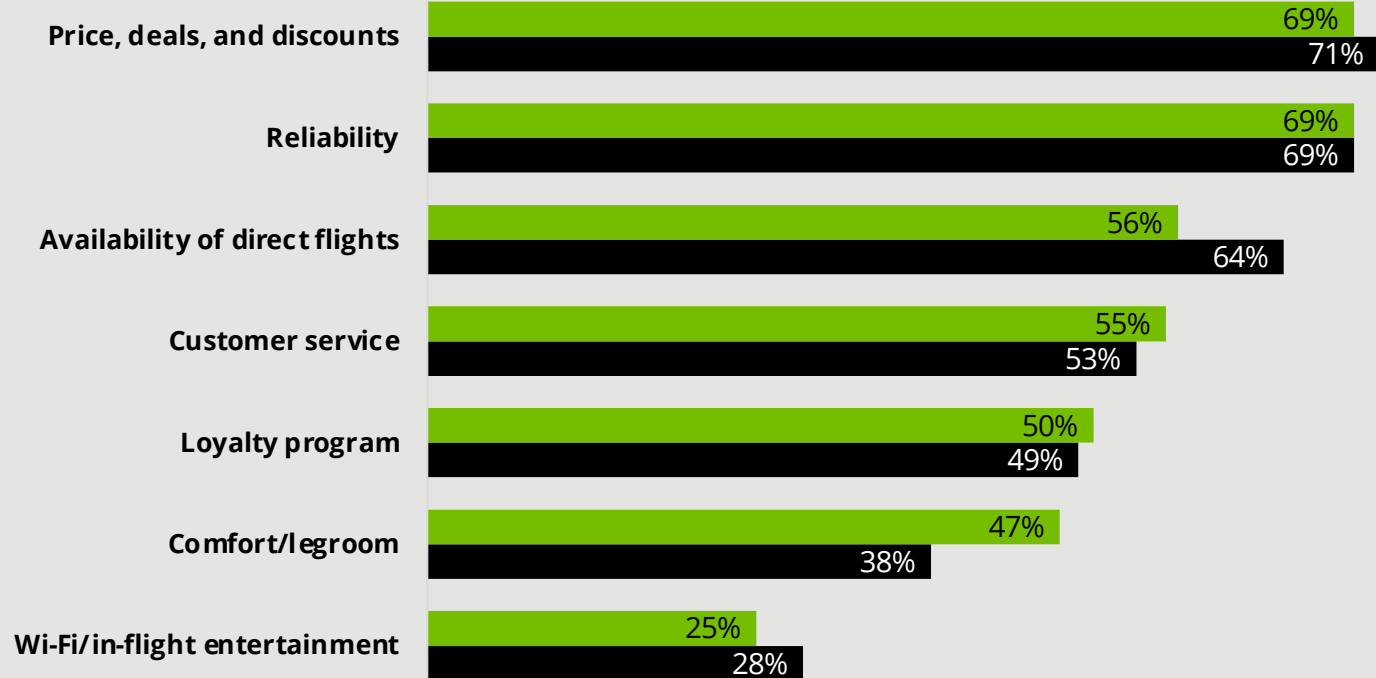
Note: N = 1,005.

Source: 2023 Deloitte summer travel survey.

Choosing an airline isn't all about price: Half of flyers cite factors like customer service and loyalty programs as very important. Those taking international trips give much greater weight to legroom.

● International flyers ● Domestic flyers

Importance of factors when choosing an airline
% very important



With more taking to the skies, fewer are planning to hit the road

↓53%

of travelers are planning at least one road trip this summer
(vs. 64% in 2022)

46%
Driving own vehicle

13%
Driving rental vehicle

Note: N = 1,957.

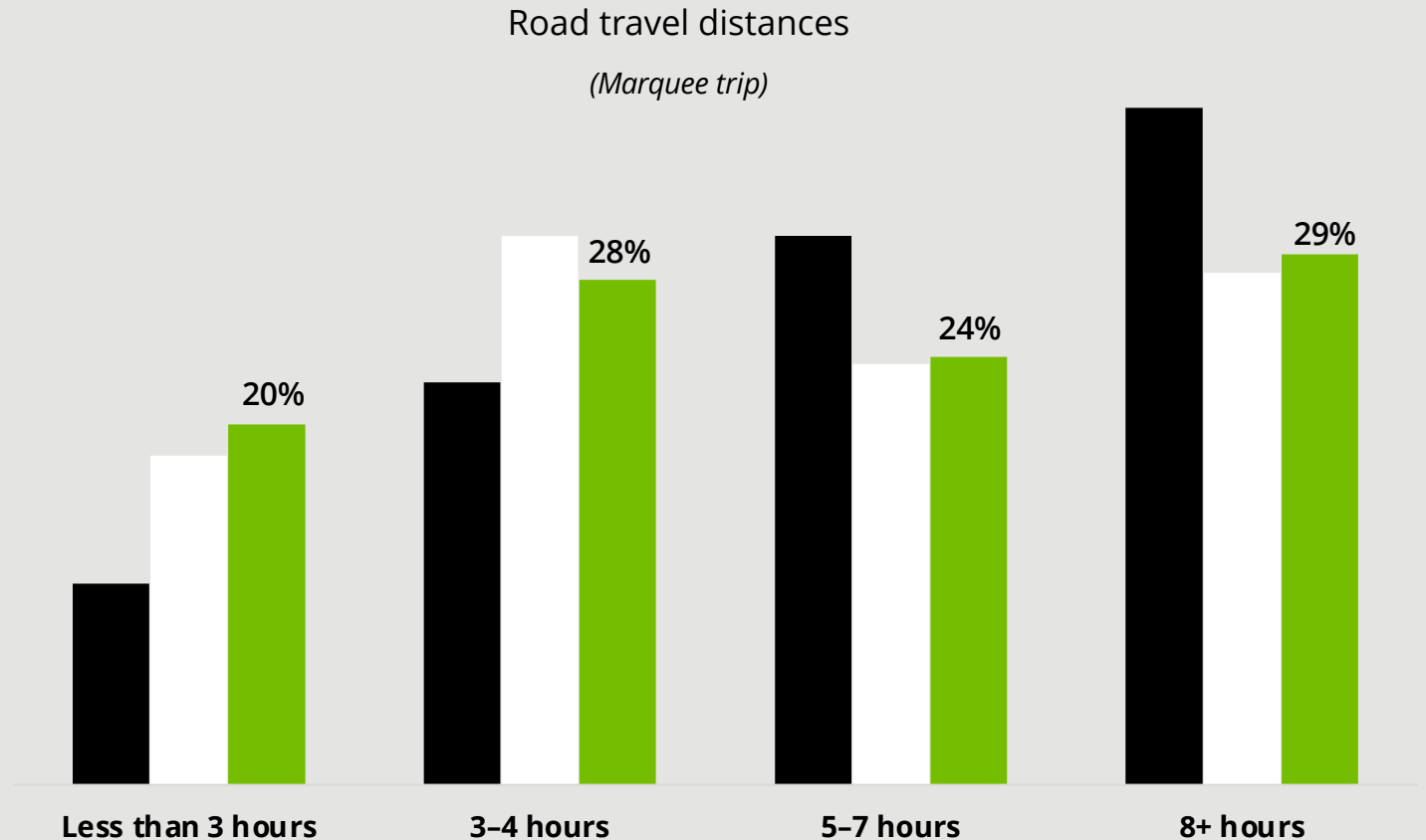
Questions: (1) How will you be reaching your destination? (Select all that apply); (2) How far will you be driving from home to reach your destination?

Note: N = 1,064.

Source: 2023 Deloitte summer travel survey.

Road travel distances for marquee trips remain similar to 2022, but fewer Americans plan to travel by car.

● 2021 ● 2022 ● 2023



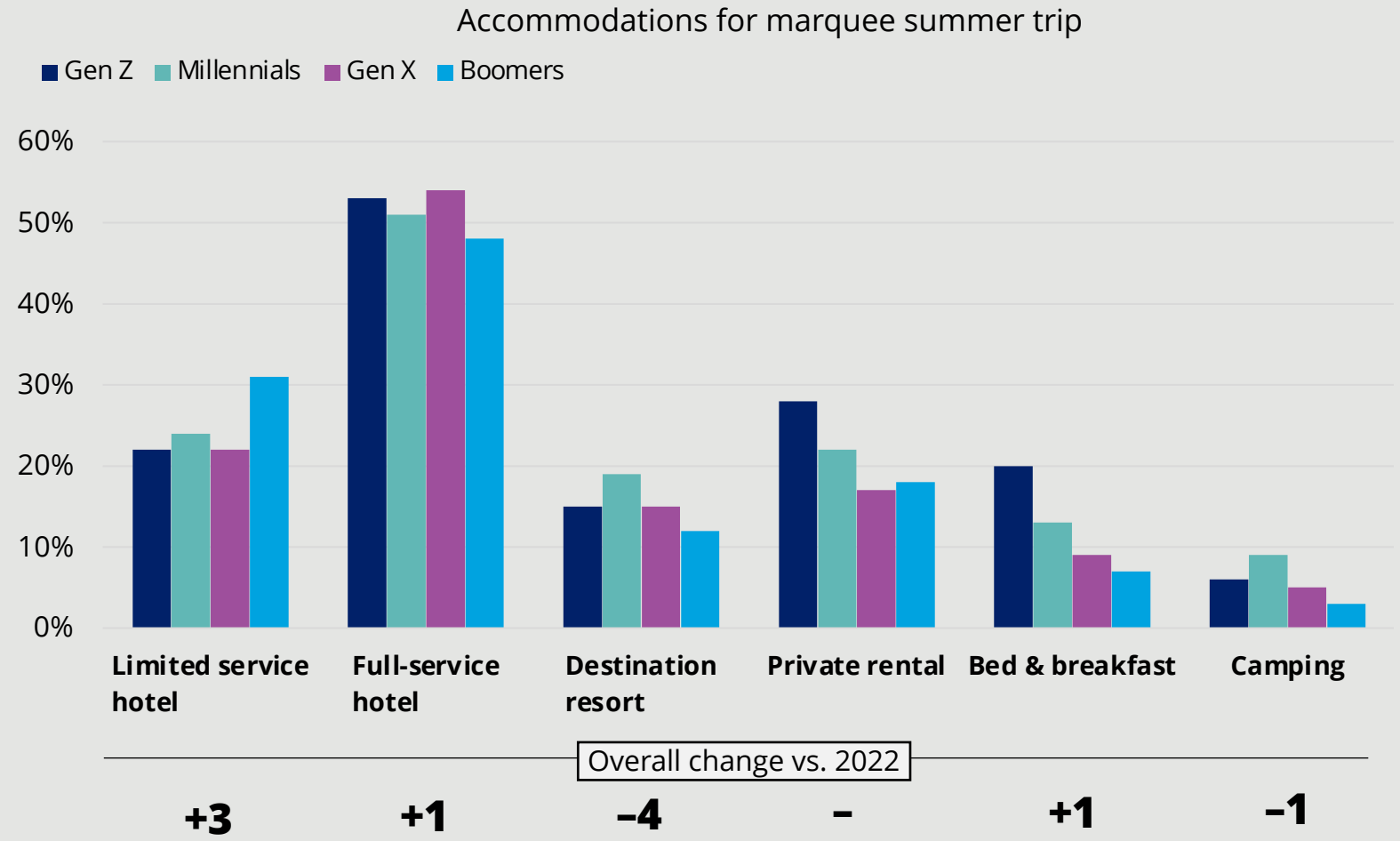
Full-service hotels dominate lodging choices

51%

of travelers are staying in full-service hotels during marquee trips

Question: Which type of lodging are you planning to stay at or considering for your longest trip of the summer? (Select all that apply)
 Note: N = 1,957.
 Source: 2023 Deloitte summer travel survey.

Private rentals are still trending with younger travelers.



Despite the maturity of the private accommodation space, hotel stayers still significantly outnumber summer renters

3 in 4

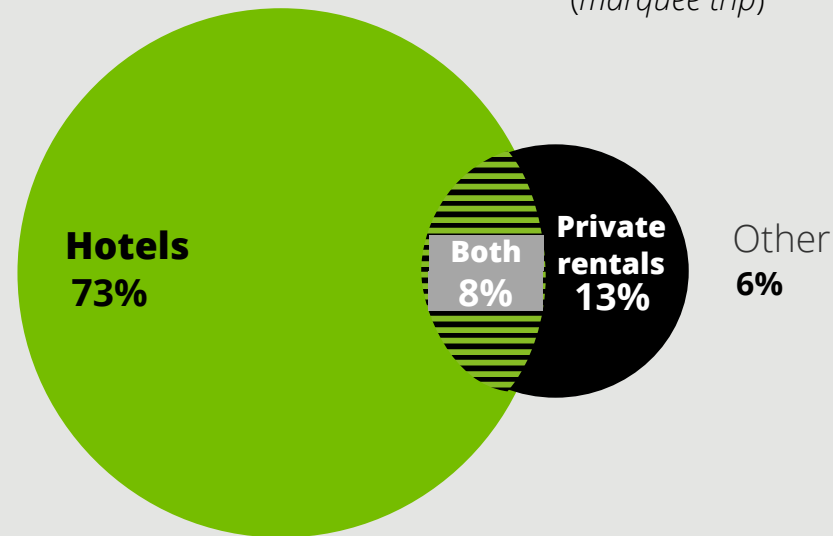
Summer travelers strictly sticking to hotels (vs. private accommodations) during marquee trips

Questions: (1) Which type of lodging are you planning to stay at or considering for your longest trip of the summer? (Select all that apply); (2) What best describes the destination you will travel to?
Note: N = 1,957.

Source: 2023 Deloitte summer travel survey.

Preference for hotels and rentals varies significantly by destination type.

Summer 2023: Paid accommodation split
(marquee trip)



Destination type	Hotel only	Private rental only
Beaches	31%	43%
Cities	34%	25%
Great outdoors	12%	17%
National or state parks	8%	5%
Theme parks	8%	4%

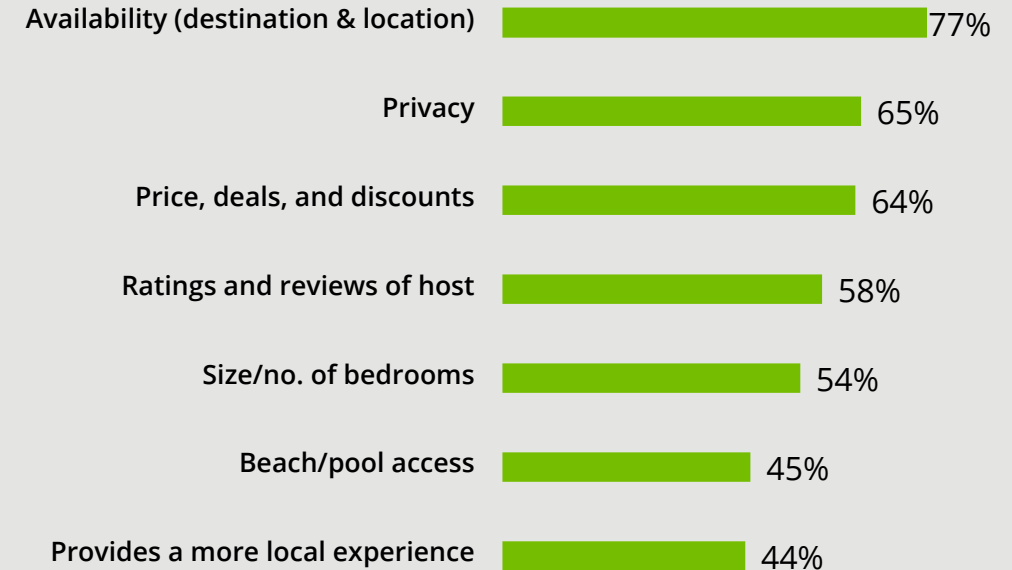
Location and price are important factors for hotel and private rental shoppers alike

Private renters say privacy is just as important as price.

Top 7 factors when choosing hotels ...
(summer hotel stayers, % very important)



... and private accommodations
(summer renters, % very important)



Questions: (1) How important were the following factors (or will they be) when choosing a hotel/resort for this trip?; (2) How important were the following factors (or will they be) when choosing a private accommodation rental?
Note: N (hotel) = 1,571; N (private rental) = 394.
Source: 2023 Deloitte summer travel survey.

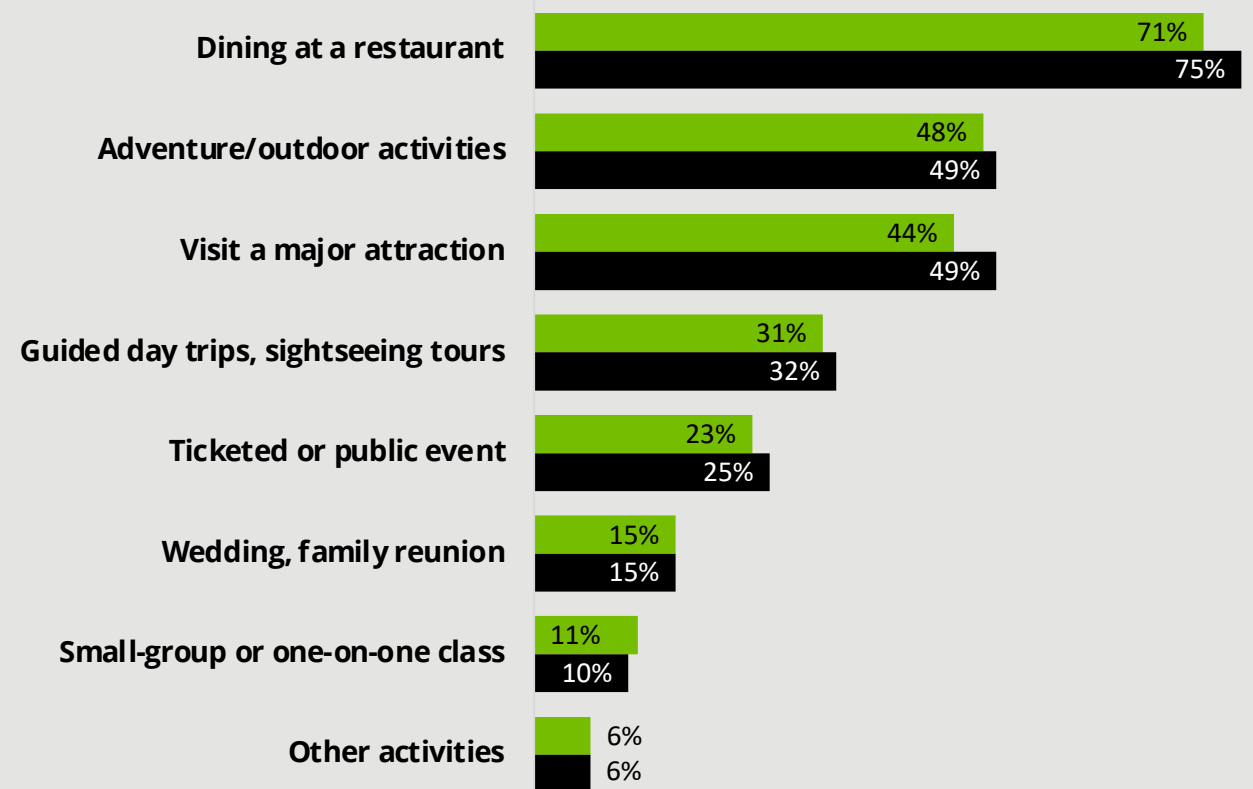
Visits to major attractions see slight traffic boost

Question: Which of the following experiences are you likely to participate in on this trip? (Select all that apply)
Note: N = 1,957.
Source: 2023 Deloitte summer travel survey.

Overall, engagement across activities and experiences remains consistent with last summer.

● 2022 ● 2023

Which activities/experiences will you participate in on this trip?





Financial well-being

As the world slowly emerged from the peak of the pandemic, a health crisis quickly turned into a financial one. From being flush with pandemic savings, Americans confronted a one-two punch of sunseting government relief programs and historic inflation.

Roughly 40% of Americans surveyed feel financially worse off compared to a year ago.¹ And for many, summer travel isn't in the cards. Among the 37% of Americans not planning to travel this summer, half pointed to their finances as the reason why. Another quarter cited high travel prices.

But Americans haven't forgotten about the years spent on the travel sidelines. Even while many feel the financial pinch, the number of Americans planning summer trips has increased for two years in a row.

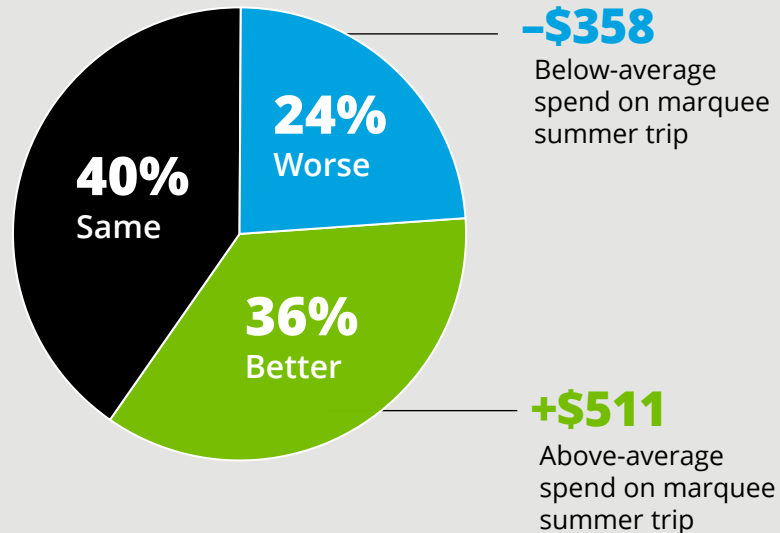
Roughly one in four soon-to-be summer travelers feel financially worse off compared to this time last year. To make summer trips happen, the less financially confident are employing some thrifty decision-making. Many have decided to forego the extra summer trip, a trend that runs counter to prevailing behavior. At the same time, they're making an effort to protect their marquee summer trips as much as possible.

¹Deloitte Global State of the Consumer Tracker.

Roughly one in four summer travelers feel their finances took a turn for the worse over the past year

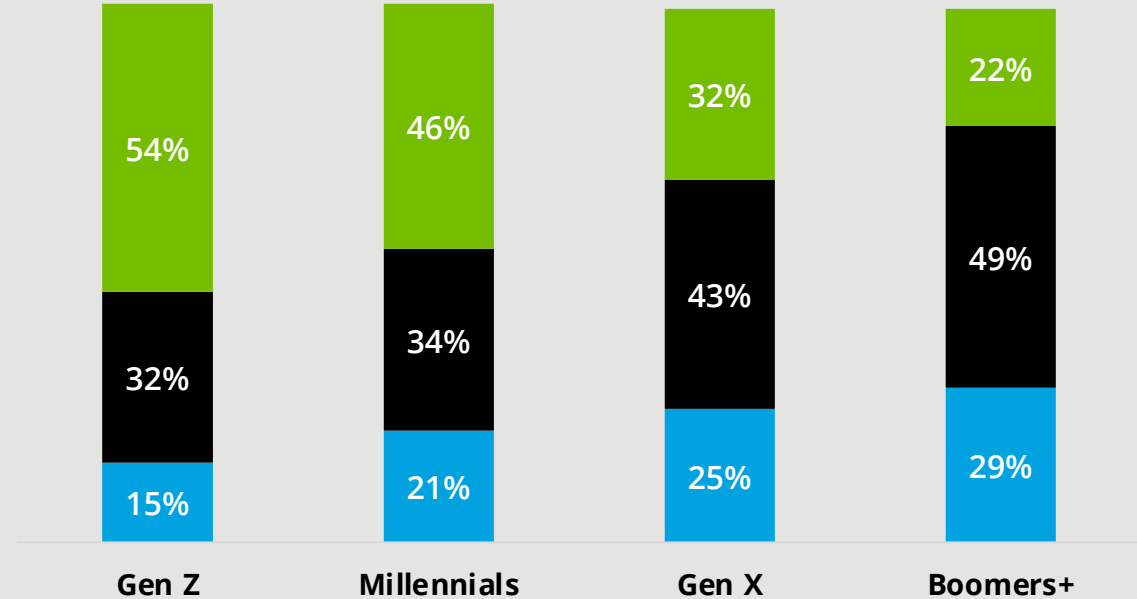
Despite the stress on finances, they are still making trips happen with some strategic travel spending decisions.

Financial situation among summer travelers
(compared to last year)



Financial stress among travelers increases significantly with age

● Better ● Same ● Worse



Question: Thinking about your household's current financial situation, would you say it is ... (Please select one)

Note: N = 1,957; 18-24 Gen Z; 25-44 Millennial; 45-54 Gen X; 55+ Boomer+.

Source: 2023 Deloitte summer travel survey.

Travelers feeling financially worse off are cutting out the extra summer trip, but are making efforts to protect their marquee getaways

Financial situation compared to last year

WORSE

BETTER

		WORSE	BETTER
General travel behavior	% of summer travelers	24%	36%
	Total number of planned summer trips	2.8	3.5
	Trip duration (marquee trip) (% 7+ nights)	37%	36%
	Taking a domestic flight	41%	44%
	Taking an international flight	18%	23%
Travel components	Paying for airline upgrades (% of flyers)	33%	39%
	Staying in a full-service hotel (marquee trip)	48%	52%
	Staying in a destination resort (marquee trip)	13%	20%
	Staying with friends or family	34%	34%
	Taking a road trip (rental car or own car)	58%	53%
Spend	Estimated marquee trip budget	US\$2,550	US\$3,430

Question: Thinking about your household's current financial situation, would you say it is ... (Please select one)

Note: N = 1,957.

Source: 2023 Deloitte summer travel survey.

Laptop luggers



Laptop lugging* is a consistent travel trend

Travelers belonging to younger and wealthier income groups are more likely to work on their marquee summer trip.

19%

Of summer travelers are planning to work (at least partially) on their marquee trip, similar to 2022

Age		
18–34 yrs	35–54 yrs	55+ yrs
50%	36%	14%

Income		
<US\$50K	US\$50K–99K	US\$100K<
22%	38%	39%

Remote working enabled travel trends

More travel but shorter marquee trip

Laptop luggers are traveling more through the summer—3.8 trips vs. 2.94 trips by disconnectors. However, their marquee trip is shorter. One in five are traveling for up to 3 nights and 44% for 4–6 nights.

Extended travel

Laptop luggers say 56% of all their summer trips are possible due to their workplace flexibility. Four in five are also able to extend their marquee trip. Half are adding 1–2 travel days, and another quarter are adding 3–6 days.

Larger travel packs

Laptop luggers are traveling in larger groups. One in four will travel with 3–5 people, while over half of disconnectors are traveling with one other adult.

*Laptop luggers: Travelers working (at least partially) on their marquee summer trip; Disconnectors: Travelers not working on their marquee summer trip.

Questions: (1) Do you plan to work during this trip?; (2) How many trips will you be taking this summer?; (3) For this trip, how long will you be traveling for?; (4) How many summer trips are you taking because of your ability to work remotely? ; (5) How many days are you adding to this trip because of the ability to work remotely?; (6) Who will you travel with on this trip?

Note: N = 368.

Source: 2023 Deloitte summer travel survey.

Laptop luggers are making sure their work continues, as well as play

How **laptop luggers** plan and participate in travel sets them apart from **disconnectors**.

Financial confidence

Laptop luggers are more financially secure, with **nearly three in five saying they are in a better position than they were last year**, vs. **31% of disconnectors**.

Security motivates their travel and enables them to spend more.

One in five are traveling because they feel more confident of their finances (vs. **9%**) and 12% are leveraging the **strength of the dollar** (vs. **3%**).

More laptop luggers are spending a higher amount on their marquee trip compared to last year and are twice as likely to attribute it to their financial position.

Ensuring work continuity

Laptop luggers are considering work environments when making travel decisions.

Destination: Pick destinations requiring minimal travel distance/time.

Transportation: More likely to fly and value the availability and quality of onboard Wi-Fi when selecting their airline. Those driving, drive shorter distances.

Accommodation: Ensure the availability of an adequate work setup when choosing accommodation.

Avid and active travelers

Laptop luggers are more likely to be habitual summer travelers. They are **making up for trips they missed out** on due to the pandemic, seeking out their **desired destinations**, and **crowdsourcing recommendations** from friends, family, and social media.

Higher participation across most activities

	Laptop luggers	Disconnectors
Major attraction	56%	48%
Outdoor activity	51%	49%
Sightseeing, tours, etc.	38%	31%
Public event, fest, concert, etc.	36%	22%
Private event	26%	12%
Group or one-on-one class	18%	8%

Questions: (1) Thinking about your household's current financial situation, would you say it is ...; (2) What motivates you to take this trip? (Select all that apply); (3) How does your budget for this trip compare to your budget for your longest summer trip in 2022?; (4) Please indicate how important the following factors are to your destination selection for this particular trip.; (5) How will you be reaching your destination?; (6) How important were the following factors (or will they be) when choosing what airline to fly with for this trip?; (7) How important were the following factors (or will they be) when choosing the accommodation for this trip?; (8) Which of the following experiences are you likely to participate in on this trip? (Select all that apply)

Note: N = 368.

Source: 2023 Deloitte summer travel survey.

Remote working enables travel for disconnectors too

1 in 5

Overall summer trips of disconnectors are enabled by remote working

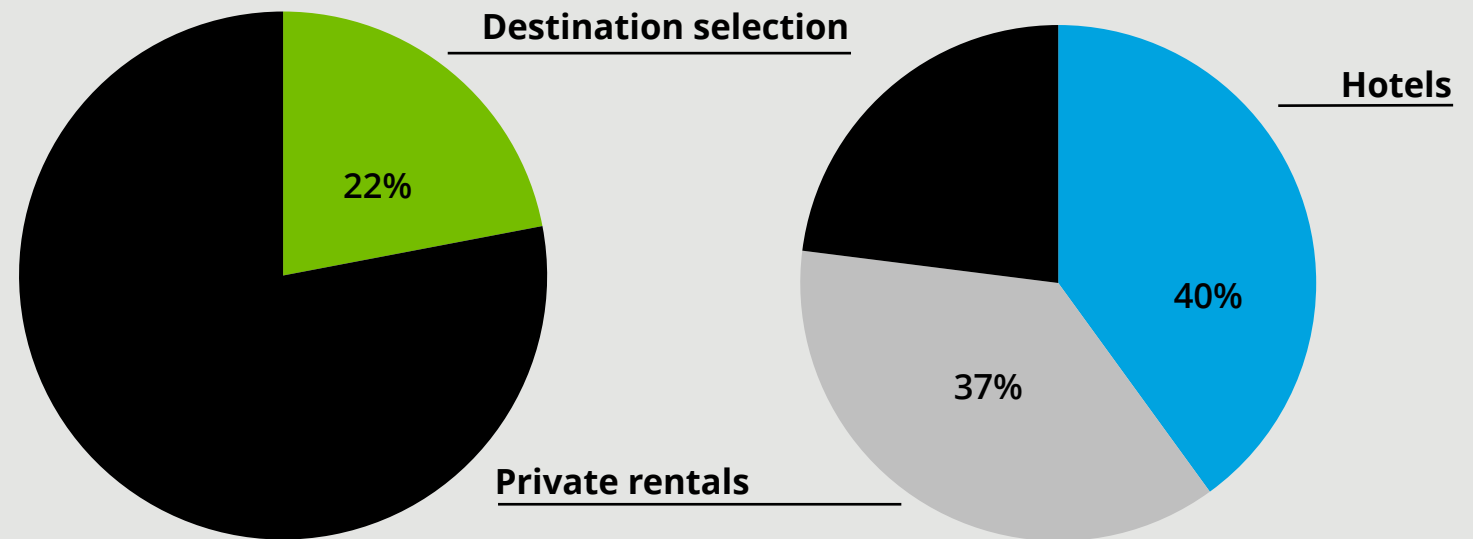
Questions: (1) How many summer trips are you taking because of your ability to work remotely?; (2) Please indicate how important the following factors are to your destination selection for this particular trip; (3) How important were the following factors (or will they be) when choosing a hotel/resort for this trip?; (4) How important were the following factors (or will they be) when choosing a private accommodation rental?

Note: N = 1,594.

Source: 2023 Deloitte summer travel survey.

Even those not working on their marquee trip are considering work-conducive environments when making travel decisions (*likely accommodating for others in their travel party or preparing for potential work requirements*).

Disconnectors considering the ability to work remotely in the destination and lodging selection of their marquee trips



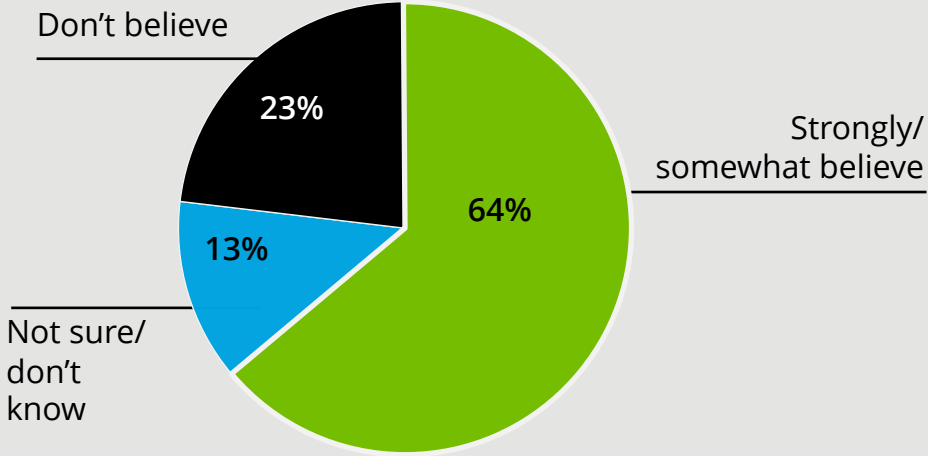
Climate change impact



Most travelers believe climate change is an emergency

Climate-change sentiment, however, shows little impact on summer travel behavior.

Percentage that believe climate change is an emergency



	Do not believe climate change is an emergency	Believe climate change is an emergency
% of summer travelers	23%	64%
Total number of planned summer trips	3.0	3.1
Taking a domestic flight	39%	44%
Taking an international flight	17%	25%
Estimated marquee trip budget	US\$2,625	US\$3,000

Question: Do you believe climate change is an emergency?
 Note: N = 1,957.
 Source: 2023 Deloitte summer travel survey.

Demographic trends

An aerial photograph of a coastline. The top left shows a wide, sandy beach with some small figures of people. The ocean is a vibrant turquoise color, with white, foamy waves crashing onto the shore. The waves are breaking in a series of parallel lines, creating a textured, white foam. The overall scene is bright and clear, suggesting a sunny day.

Travel incidence (the percentage of Americans taking trips this summer) rises with age. Boomers are a slight exception.

2x

A little over half of Gen Z (18–24) don't plan to travel this summer—but they're twice as likely to say it's because they're planning postsummer trips

Questions: (1) What activities are you planning to partake in during summer 2023 (between Memorial Day and the end of September)? (2) Across travels this summer, will you ...

Note: N = 3,583.

Source: 2023 Deloitte summer travel survey.

Summer travel incidence has been rising over the past few years for older generations, especially for Gen X travelers.

Taking at least one trip this summer	Gen Z	Millennials	Gen X	Boomers
2023	47%	64%	69%	66%
2022	49%	62%	59%	62%
2021	46%	58%	57%	56%

Reasons for not traveling	Gen Z	Millennials	Gen X	Boomers
I cannot afford it	50%	55%	53%	46%
Travel is too expensive right now	22%	21%	27%	26%
No destination in mind	18%	13%	15%	17%
Rather spend on other things	17%	14%	13%	19%
Plan to travel after the summer	16%	9%	9%	12%

Estimated spend on marquee trips is consistent across generations

Younger travelers, however, are looking to take more trips throughout the summer.

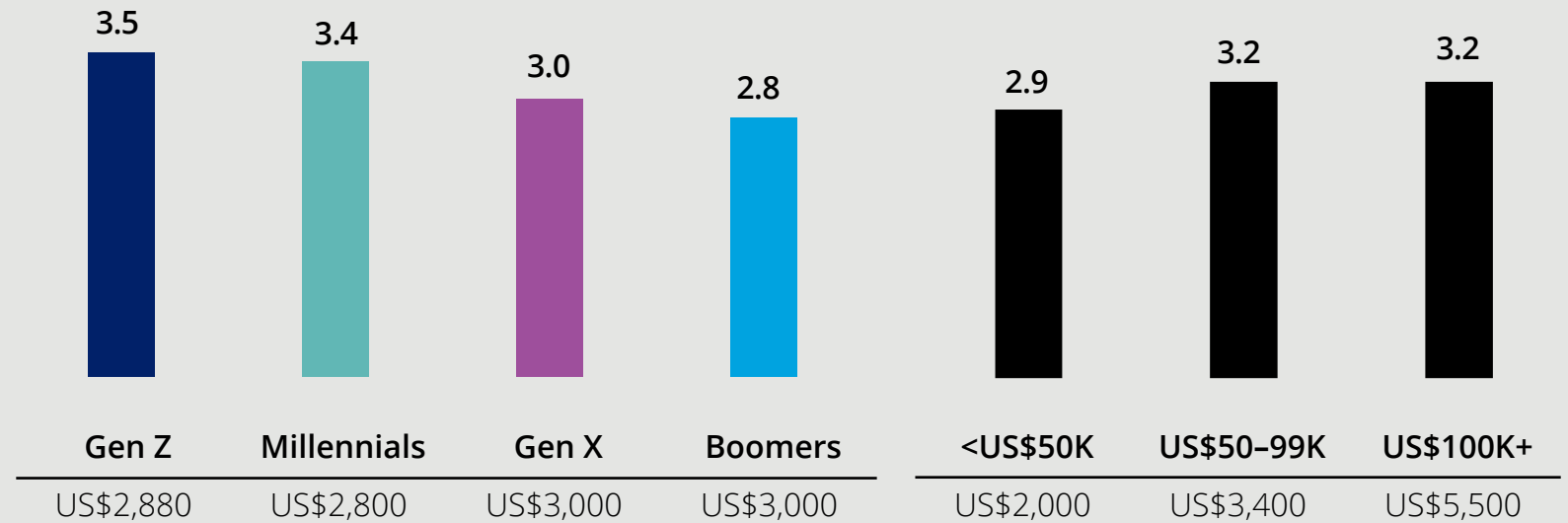
40%

Of Gen Z travelers are planning to stay with friends and family for at least one trip this summer

Summer trip frequency

By generation

By income



Questions: (1) How many trips will you be taking this summer? (2) How much is the estimated budget for your summer trip? Please include ONLY your transportation and lodging costs in this estimate.

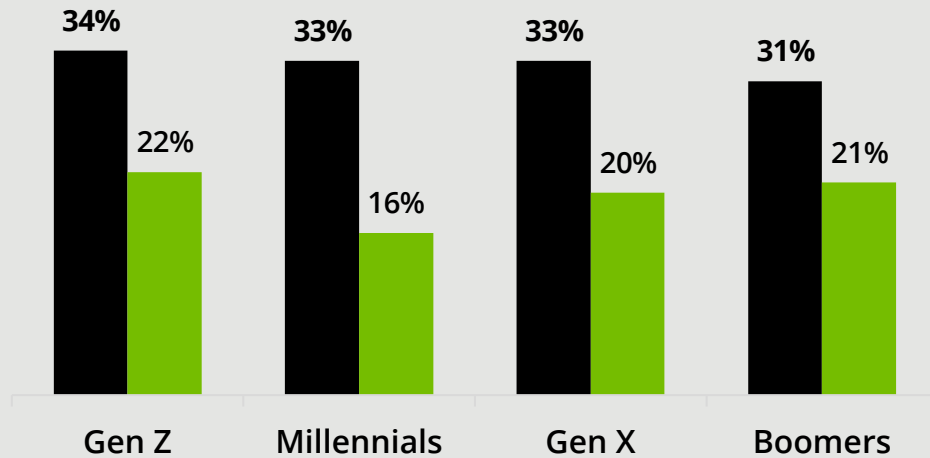
Note: N = 1,957.

Source: 2023 Deloitte summer travel survey.

Younger and older travelers are just as likely to fly this summer—domestic or international

Demand for premium fare classes and seat upgrades rises sharply with age.

Percentage flying for marquee summer trip
 ● Domestic flyers ● International flyers



Type of airfare booked
 (among flyers who've already booked their transportation)

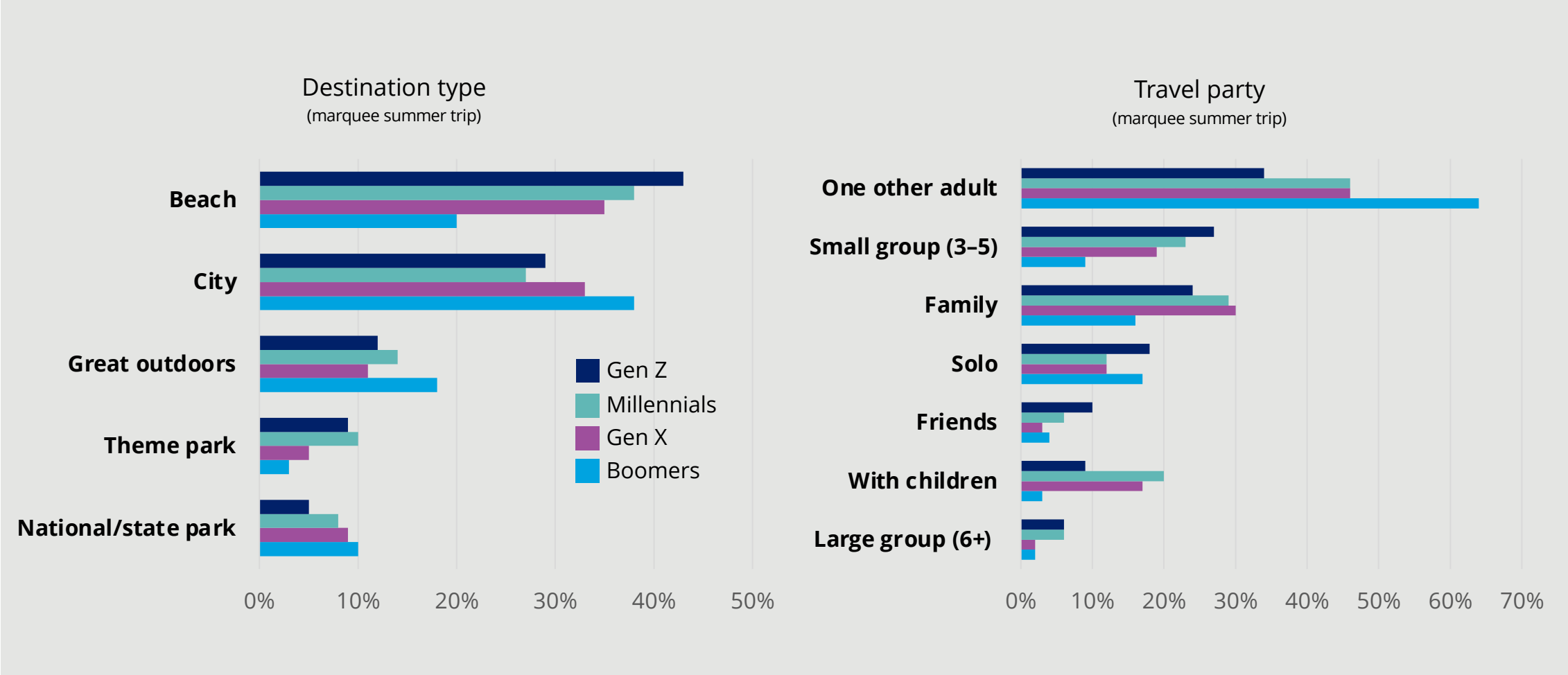
	Gen Z	Millennials	Gen X	Boomers
First- or business-class ticket	6%	8%	17%	21%
Ticket with some upgrades	31%	26%	21%	23%
Lowest price ticket of my preferred airline	35%	38%	44%	35%
Lower-price ticket of any airline	27%	29%	17%	21%

Question: Which best describes the airfare that you booked?

Note: N = 1,957.

Source: 2023 Deloitte summer travel survey.

Destination preferences shift strongly by age—particularly for beach vs. city



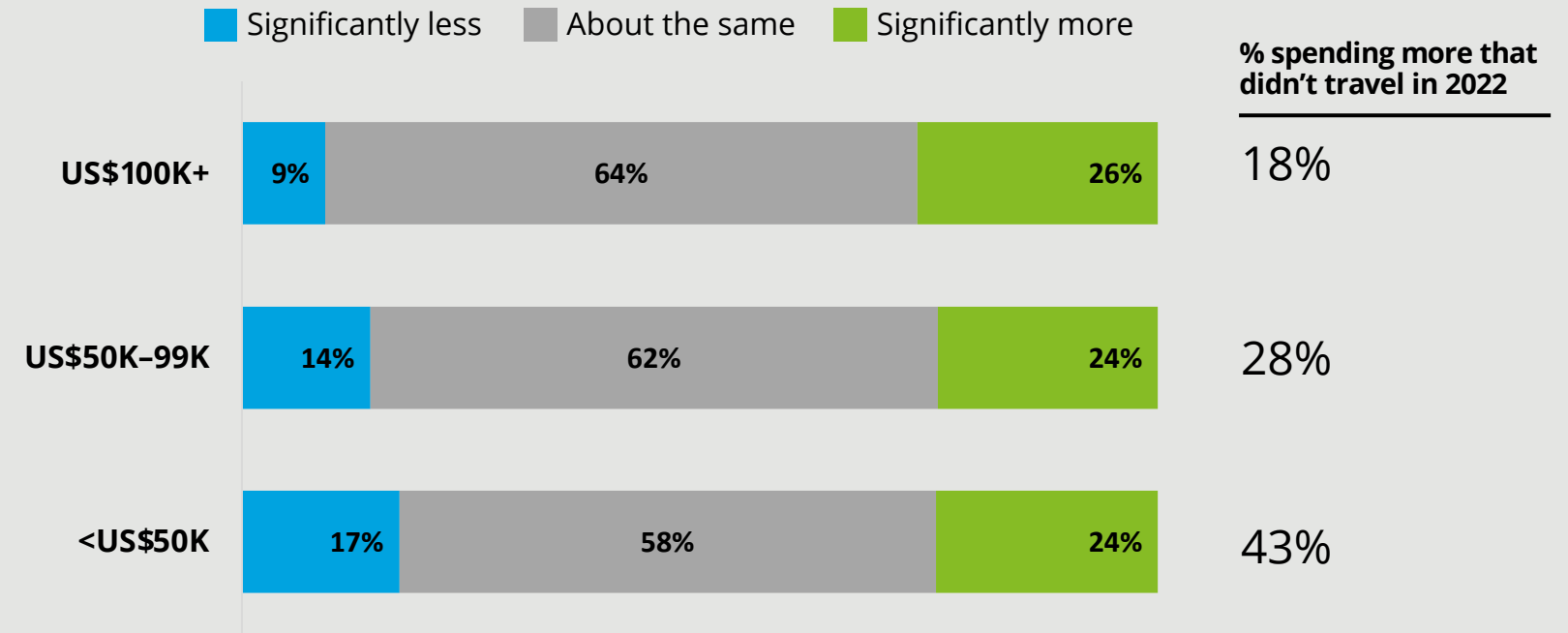
Questions: (1) What activities are you planning to partake in during summer 2023 (between Memorial Day and the end of September)? (2) Across travels this summer, will you ... (2) Who will you travel with on this trip? (Select all that apply)
 Note: N = 1,957.
 Source: 2023 Deloitte summer travel survey.

Roughly one in four travelers plan to spend more this summer—even among lower-income travelers

However, almost half (43%) of lower-income travelers who plan to spend more didn't travel last summer

Lower-income Americans are roughly 2X as likely to say they are pulling back on their trip budget.

How does your 2023 summer travel budget compare to 2022?



Question: How does your budget for this trip compare to your budget for your longest summer trip in 2022?

Note: N = 1,957.

Source: 2023 Deloitte summer travel survey.

Authors

Let's talk.

Thank you

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