

2023 | Q3

# Traveler Insights



# Travel enthusiasm holds strong

Each quarter, we share insights into traveler intent and demand based on 70 petabytes of our first-party data from hundreds of millions of travelers visiting our traveler brands around the world. In addition to first-party insights, we also conduct custom research to help inform you on how to best understand and engage with today's travelers.

We released [The Path to Purchase: Uncovering how travelers plan and book online](#) research in July, which dives into the influences and resources used throughout the traveler's path to purchase, from inspiration to booking. The research showed that 80% of travelers who visited an OTA during their path to purchase spent

an average of 160 minutes on OTAs in the 45 days before making a purchase. To provide more insight into how travelers spend this time with OTAs, we're following up with our first-party data, looking at how visitors to Expedia Group traveler brands search, plan, and book travel.

For the second quarter of 2023, our research and data show that traveler enthusiasm remains strong, with the return of seasonal trends like quick trips tied to events and spring and summer holidays in the Northern Hemisphere. Long-haul destinations outside of home regions also rose in popularity, indicating that international travel demand continues to grow.









# Search volume steadies, while EMEA shows growth.

Following a strong 25% quarter-over-quarter (QoQ) increase in traveler searches on our traveler brands in Q1 2023, search volumes in Q2 held steady with the prior quarter, indicating sustained travel interest globally. This trend is consistent with seasonality in previous years, with persistent search volumes in Q2 2022 after a 25% QoQ lift in searches in Q1 2022.

Europe, the Middle East, and Africa (EMEA) showed the strongest search growth, with a 10% increase in searches both QoQ and year-over-year (YoY).

Globally, week-over-week (WoW) search volume fluctuated throughout Q2, with some upticks leading up to and around major holidays and events. During the week of April 10, EMEA saw a 20% WoW increase in search volume,

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↗ 10%

increase in **searches both QoQ and YoY in EMEA**

↗ 20%

increase in **WoW searches in EMEA week of April 10**

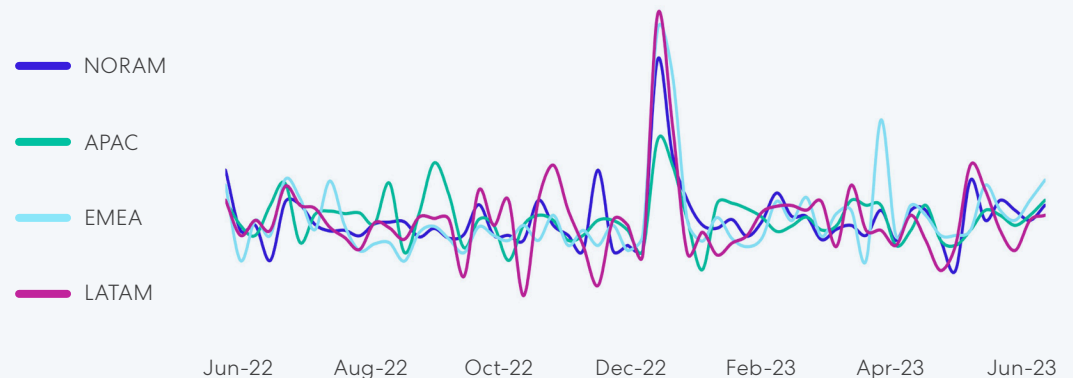
↗ 10%

increase in **WoW searches in NORAM and LATAM week of May 22**



Q2 | 2023

Destinations super-regions | WoW search % change



Source: Expedia Group data, Q2 2022 - Q2 2023



with a nearly 30% increase in domestic searches and an over 15% increase in international searches. This uptick may have been tied to planning for then-upcoming events, including the King's Coronation (May 6) and Eurovision in Liverpool (May 7), revealing that travelers in EMEA are searching nearly one month out.

North America (NORAM) and Latin America (LATAM) searches were strong the week of May 22 leading up to Memorial Day weekend in the U.S., with around a 10% increase in each region. This tells us that these travelers may be booking last minute, especially in advance of three-day weekends.



## Traveler interest on the rise for European cities

European cities saw substantial increases in search volume, with some experiencing double-digit growth in the quarter, including cities throughout Italy: Rome (30%), Venice (30%), and Florence (40%). Turkish beach cities such as Antalya and Dalaman also saw strong search growth in Q2, experiencing a nearly 70% and an over 150% uptick in searches, respectively.

To take a closer look at how travel demand has changed since COVID-19, we compared Q2 2023 search volumes to Q2 2019 and saw some interesting increases that highlight the growing traveler interest in the region. Both Milan and Florence saw an over 50% increase in searches, while Dalaman experienced a triple-digit boost in searches. Additionally, secondary cities in Italy saw impressive double-digit growth compared to 2019, including Genoa (nearly 90%) and Catania (over 80%). With the popularity of European cities during spring and summer in the Northern Hemisphere, this increase in searches is likely connected to seasonal travel planning and traveler interest in smaller cities or lesser-known destinations.



### Italian cities with an increase in search volume QoQ in Q2:

- ↗ 40% Florence
- ↗ 30% Rome
- ↗ 30% Venice







# Travelers planning for the short term

Our Path to Purchase research revealed that travelers (and not just those that book on our apps and experiences) on average, spend 71 days researching and planning a trip — and book their trips 73 days before the trip starts. International travelers understandably have a longer path to purchase of 85 days and an extended post-purchase window of 94 days, compared to the 61-day path to purchase and 60-day post-purchase window for domestic travelers.

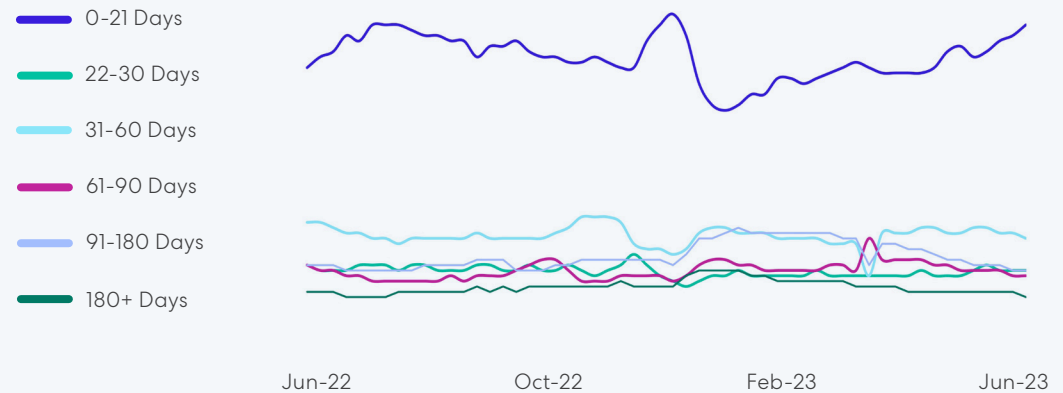
This is aligned with our data, specifically on international travel. International searches in the 0- to 90-day window increased nearly 15% QoQ, with the 61- to 90-day search window increasing 10% this quarter.

In another indicator that seasonal trends are returning, we saw travelers again planning for the short term with short-lead trips during the spring



2022-2023

Global traveler search windows | WoW % Change



Source: Expedia Group data, Q2 2022-Q2 2023

**Globally, searches in the 0- to 60-day window**

**increased by 15% QoQ, with a 15% increase in the**

**0- to 21-day window.**



and summer months in the Northern Hemisphere. Globally, searches in the 0- to 60-day window increased by more than 10% QoQ, with a 15% increase in the 0- to 21-day window. In NORAM, search share in the 0- to 21-day window increased 15% QoQ, while EMEA and LATAM saw an approximately 10% increase in the 0- to 21-day window compared to Q1.

Domestic search windows for near-term planning grew in EMEA, LATAM, and NORAM, with 10% QoQ growth in LATAM and NORAM for the 0- to 21-day window, and 30% QoQ growth in the 31- to 60-day window in EMEA.

Interestingly, in Asia Pacific (APAC), the 91- to 180-day window for domestic searches increased by nearly 20% QoQ. Although most APAC travelers are planning short-lead domestic trips, this indicates there are signs of growth for longer-lead planning.





# Long-haul destinations on the rise

In Q2, there was some movement among the global top 10 list of booked destinations, while New York City, Las Vegas, and London held on to the top spots. Tokyo moved up from #8 to #6, and Boston joined the rankings at #10, while Honolulu moved off the list.

Looking at the top 10 booked destinations across all regions, long-haul destinations outside the origin region rose in popularity, showing that international travel demand remains strong. London and New York were both popular destinations for travelers, appearing on the top 10 booked destinations list across all regions.

**London and New York**

**appear on the top 10 booked**

**destinations list in every region**

## The rise of long-haul international routes

Long-haul international routes rose in popularity, with more travelers searching for trips from North America to destinations in Asia and Europe. Q2 data shows that searches from the U.S. to China increased by over 30% during the quarter, and searches from Canada to Italy increased by over 15%. Additionally, searches from Hong Kong to Japan increased by more than 30% during Q2, which could be a result of Japan lifting all COVID-19 travel restrictions last quarter.



### Top 10 booked destinations | Q2 2023

\*New top 10 destination



#### For APAC travelers

- Tokyo, Japan
- Osaka, Japan
- London, England
- Seoul, South Korea
- Singapore
- Paris, France
- Bangkok, Thailand
- Taipei, Taiwan
- Honolulu, Hawaii
- New York, New York\*



#### For EMEA travelers

- London, England
- New York, New York
- Paris, France
- Dubai, UAE
- Barcelona, Spain
- Amsterdam, Netherlands
- Istanbul, Turkey\*
- Rome, Italy
- Copenhagen, Denmark
- Stockholm, Sweden\*



#### For LATAM travelers

- Mexico City, Mexico
- New York, New York
- Cancun, Mexico
- São Paulo, Brazil
- Madrid, Spain
- Paris, France
- Rio de Janeiro, Brazil
- London, England\*
- Playa del Carmen, Mexico
- Las Vegas, Nevada



#### For NORAM travelers

- New York, New York
- Las Vegas, Nevada
- Los Angeles, California
- Chicago, Illinois
- Orlando, Florida
- London, England
- Cancun, Mexico
- Boston, Massachusetts\*
- Paris, France
- San Francisco, California\*

Source: Expedia Group data, Q2 2023





For APAC travelers, London and Bangkok moved up in the rankings, and New York joined the top 10 booked destinations list. Newcomers Istanbul and Stockholm entered the top 10 for EMEA travelers, while New York held on to the #1 spot. There was also movement in the top destinations for LATAM travelers, with New York and Madrid moving up in the rankings from #3 to #2 and from #6 to #5, respectively, and London joining the list. For NORAM travelers, Los Angeles moved up to #3 from #5, and Boston and San Francisco joined the top 10.

## Vacation rental destination trends

Consistent with a theme we have seen in previous reports, domestic travel continues to drive the vacation rental category. Vacation rental guests from APAC continued to seek out destinations within Australia, which accounted for seven of the 10 top-booked destinations, with Port Macquarie joining the list. Similarly, destinations within Brazil remained popular among LATAM vacation rental guests, with São Paulo and Campos do Jordão entering the top 10 list. EMEA vacation rental guests continued to seek out waterside destinations with Davenport, Florida, and Antibes, France, joining the list as newcomers.



### Top 10 Vrbo-booked destinations | Q2 2023

\*New Top 10 destination



#### For APAC travelers

- Queenstown, New Zealand
- Surfers Paradise, Australia
- Dunsborough, Australia
- Cowes, Australia
- Bright, Australia
- Paris, France
- London, England
- Port Douglas, Australia
- Port Macquarie, Australia\*
- Jindabyne, Australia



#### For EMEA travelers

- Paris, France
- Albufeira, Portugal
- Kissimmee, Florida
- Nice, France
- Cuxhaven, Germany
- Davenport, Florida\*
- London, England
- Playa Blanca, Spain
- Antibes, France\*
- Porto-Vecchio, France



#### For LATAM travelers

- Rio de Janeiro, Brazil
- Bertioga, Brazil
- Guarujá, Brazil
- São Paulo, Brazil\*
- Praia Grande, Brazil
- Cabo Frio, Brazil
- Kissimmee, Florida
- Ubatuba, Brazil
- Campos do Jordão, Brazil \*
- Paris, France\*



#### For NORAM travelers

- Panama City Beach, Florida
- Gulf Shores, Alabama
- Orange Beach, Alabama
- Destin, Florida
- Myrtle Beach, South Carolina
- Kissimmee, Florida
- Hilton Head, South Carolina
- Sevierville, Tennessee
- Lahaina, Hawaii
- Miramar Beach, Florida

Source: Expedia Group data, Q2 2023







# Sporting events in the spotlight

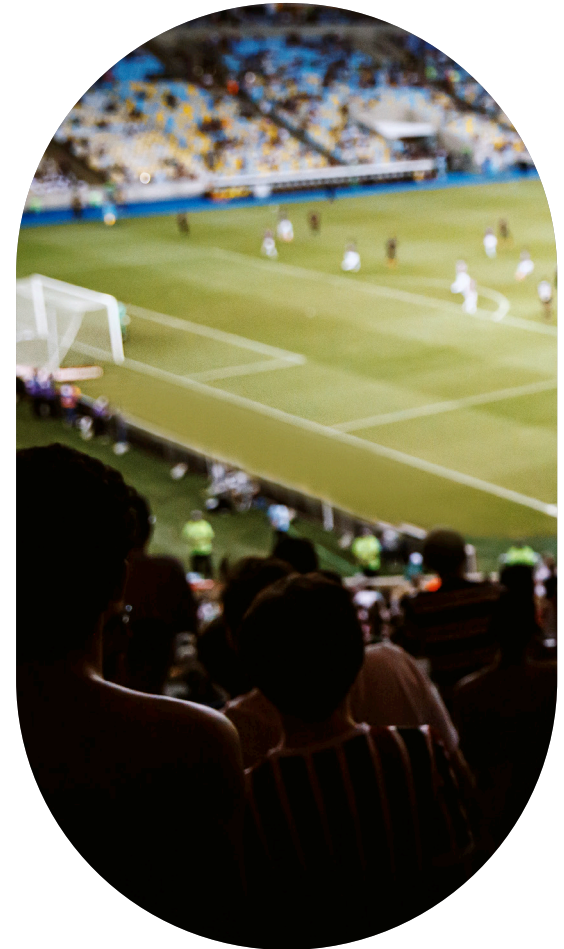
Our Path to Purchase study found that 24% of travelers are initially inspired to take a trip because of a specific event or celebration such as a concert, festival, sporting event, or wedding. This correlates with our Q2 data as major sports games and tournaments drove strong search increases for the corresponding destinations, and many fans returned to large-scale live sporting events as COVID-19 concerns waned.

For example, the annual UEFA Europa Conference League Final was held in Prague, Czech Republic, on June 7 this year. In Q2, international searches to Prague increased by nearly 15% YoY, indicating that this boost in searches could be connected to fans looking to travel overseas to watch the UEFA final game in person. Searches for Prague in Q2 primarily came from travelers in the U.S. and Germany, though the UK and Italy trailed closely behind as West Ham

United F.C. and Fiorentina played in the final game. Additionally, the share of Italian travelers coming to Prague in Q2 increased YoY, indicating that the event was likely a significant driver of tourism to the region from Italy.

Similarly, with the 2023 UEFA Champions League Final held in Istanbul on June 10, Q2 international searches to the region increased by nearly 10% YoY. Interestingly, when comparing Q2 searches from the UK to Istanbul and Prague, search volume to Istanbul was nearly 3x that of searches to Prague — likely due to the strong interest in Manchester City reaching the final game for the first time.

**24% of travelers are initially  
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a specific event or celebration**



Additionally, Wimbledon, which was held in London from June 26 through July 6, drew strong interest as travelers planned their trips, with global search demand to London increasing over 15% YoY in Q2. Domestic searches among EMEA travelers drove this increase, accounting for nearly 40% of searches — a more than 5% increase compared to 2022.

As we look toward the remainder of 2023, we will continue to watch what is inspiring travelers to take their next trip and how they are searching, planning, and booking. Our Path to Purchase research provides additional insight into how travelers are consuming content and what's influencing them throughout the travel shopping journey, both on and off of OTA websites. Be sure to [download the full report](#) to learn how you can connect with and convert travelers.

