

Uncover the growing importance of travel,
shifting traveller priorities and emerging
influences on booking

TRAVELLER VALUE INDEX

2025





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A note from Expedia Group's Chief Commercial Officer

The travel industry has an impressive track record of overcoming challenges and emerging stronger from them. I believe this comes from our desire to listen to travellers and adapt accordingly.

This is why we do research—to gain a better understanding, for ourselves and for you our partners, of the traveller's mindset.

With the current economic and geopolitical uncertainty, challenges and changes remain a constant for our industry. The macro-environment continues to evolve, making it critical to constantly evaluate how travellers' plans, preferences and values are shifting.

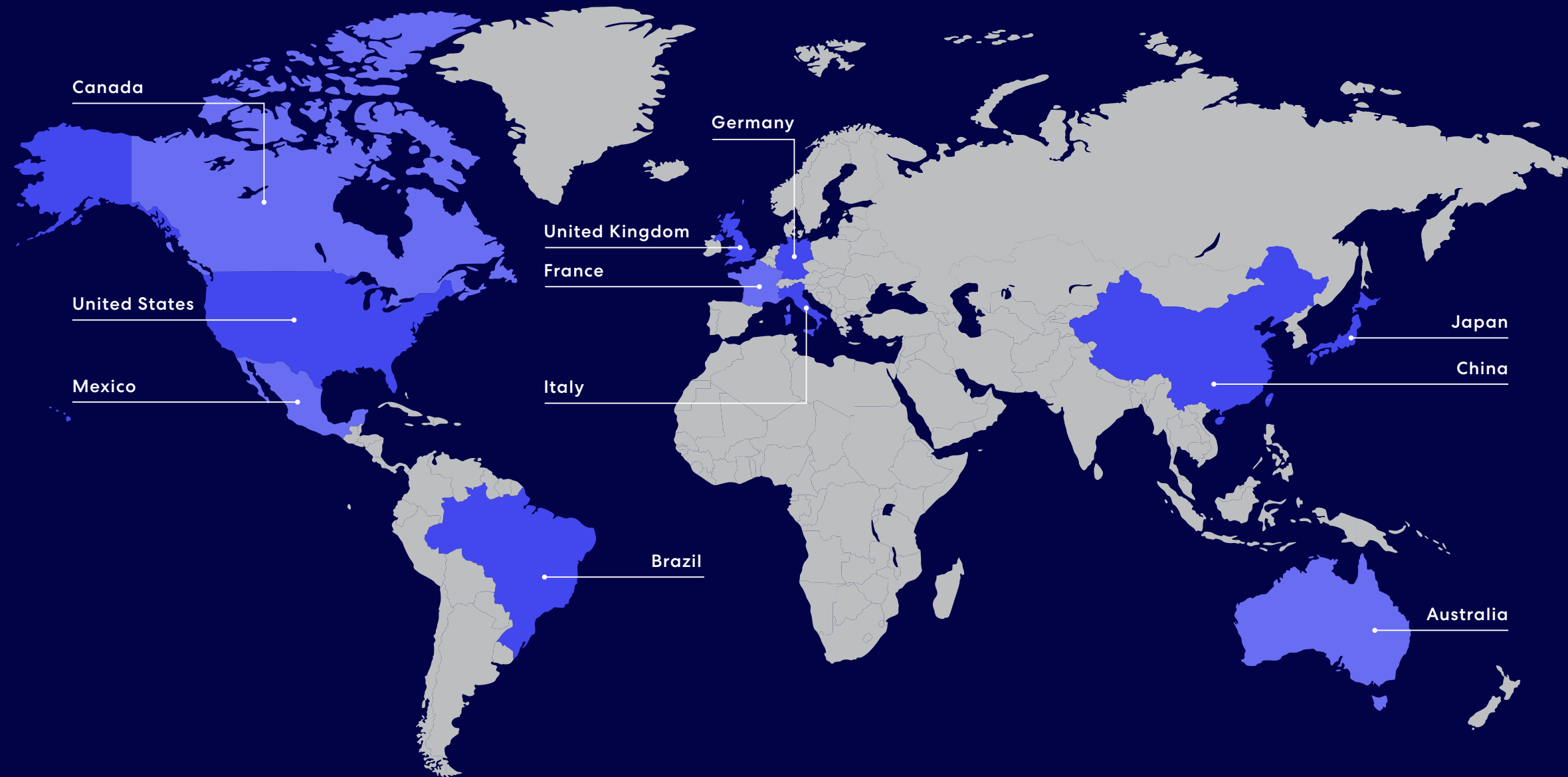
Through the data, one thing is clear—while travellers' values have evolved, the desire to travel has become fundamental. We're seeing an increased appetite for international travel, the importance of trust growing and new influences on travel emerging.

These trends provide opportunities for all of the travel industry. As your partner, our job at Expedia Group is to arm you with insights and solutions so that you can focus on delivering excellent experiences. Together, we are helping travellers build amazing life memories.



Greg Schulze

Chief Commercial Officer
Expedia Group



CHAPTER 01

Overview

The past five years have been a whirlwind for the travel industry. From the pandemic shutdowns and "revenge travel" to stability's return and now new challenges, the journey has been anything but smooth.

The way people now think about travel has changed in profound ways. Travellers today are making decisions with new priorities, shifting values and fresh perspectives that continue to shape the industry.

To better understand these changes, we partnered with Wakefield Research to revisit our [2023 Traveller Value Index](#) to gather timely and fresh insight of today's travellers and their plans for tomorrow.

Read on to understand how consumers are planning for travel for the next 12 months and what influences are impacting their travel decisions.

Inside the data

To give detailed insight into global travel, we analysed data from 11,000 consumers across 11 key markets. This is not just a snapshot in time. By revisiting insights from the 2023 Traveller Value Index, we can see changes in traveller sentiment, behaviours and booking preferences over the past few years.

- 11,000 consumer study
- Across 11 markets (Australia, Brazil, Canada, China, France, Germany, Italy, Japan, Mexico, UK, US)

CHAPTER 02

Travel is more important than ever

We've always believed that travel is a force for good. It expands perspectives and unites communities, which has never been more important.

People across the world feel the same.

50% of consumers say travel is more important to them now compared to five years ago.

This is an increase from our previous study. In July 2022, 46% of respondents said travel was more important to them at that time than it was before the pandemic¹. Despite restrictions being further in the past, it is clear the impact on people's desire to travel has not faded—in fact, it has strengthened.



A priority for younger generations

57% of travellers under 40 say travel is more important now than five years ago.

The appetite for travel grows

88% of consumers are **planning to take a leisure trip in the next 12 months**, compared to 79% from July 2022²

This increase in travel importance translates to a high appetite for travel. More people are planning to travel for leisure in the next year than in 2022 and the frequency of trips is set to increase.

Travellers are eyeing more international trips as well, as 68% of consumers have already booked or are likely to book an international trip in the next 12 months. This is a 19% increase from July 2022³ and significantly higher than December 2021⁴.

This is consistent with our APAC-specific research, which found that 81% of APAC travellers are prioritising travel and 46% say they plan to visit North America within the next 12 months. Read more about APAC-traveller trends [here](#).

Consumers are planning to take more trips—**an average of 2.88 trips**, compared to 2.05 in July 2022⁵



Strong international intent

Consumers from China (87%), the UK (77%) and Germany (72%) are most likely to travel beyond their borders.



TAKE ACTION

As eager travellers are searching for their next trip, it's vital your brand can be seen. To boost visibility on Expedia Group sites, there are several solutions you can leverage.

Accelerator and TravelAds [↗](#)

Flights Sponsored Listings [↗](#)

^{2,3,5,8} Expedia Group, 2023 Traveller Value Index
^{4,7} Expedia Group, Traveller Value Index 2022 Outlook
⁶ Expedia Group, What Travellers Want 2020

Friends and family fuel travel

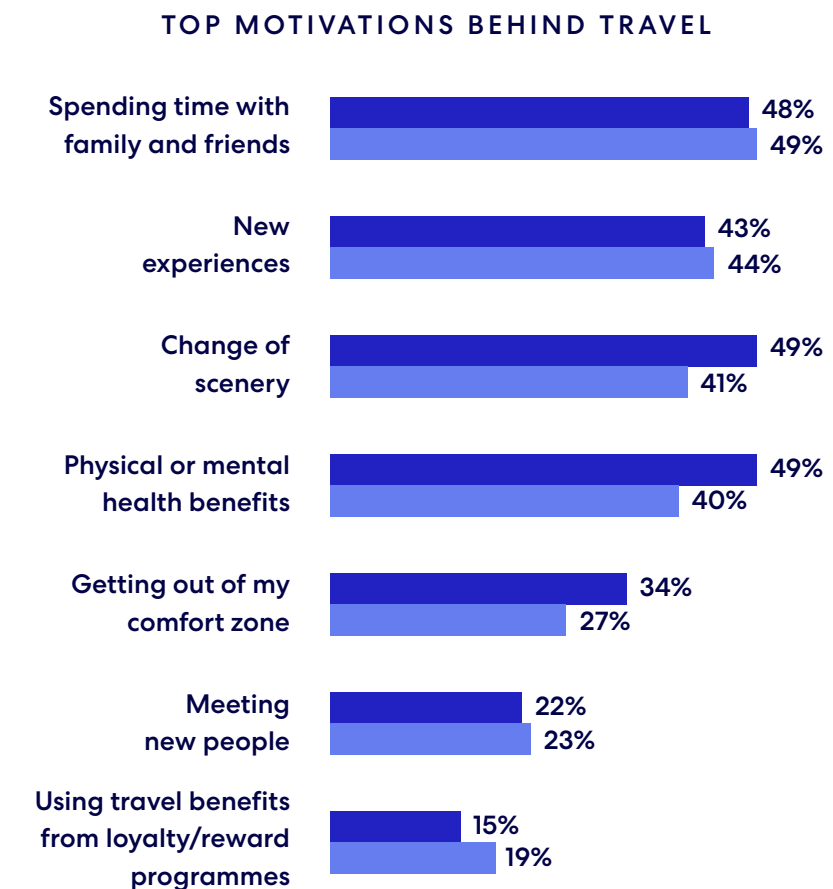
Behind every journey is a personal story. When asking travellers for a peek into these, there are several emerging patterns important for travel businesses.

The two most common reasons to travel in our latest study have both increased over the last three years. The top motivator is spending time with family and friends (49% of respondents), followed by finding new experiences (44% of respondents).



The more the merrier

Spending time with friends and family is even more important to consumers from Mexico (60%), the US (57%) and the UK (55%).



● 2022⁹
● 2025

Blurred business travel booms

Business travel has continued to rise over the last three years with 43% of consumers planning to travel for work in the next year, an 11% increase from 2022¹⁰.

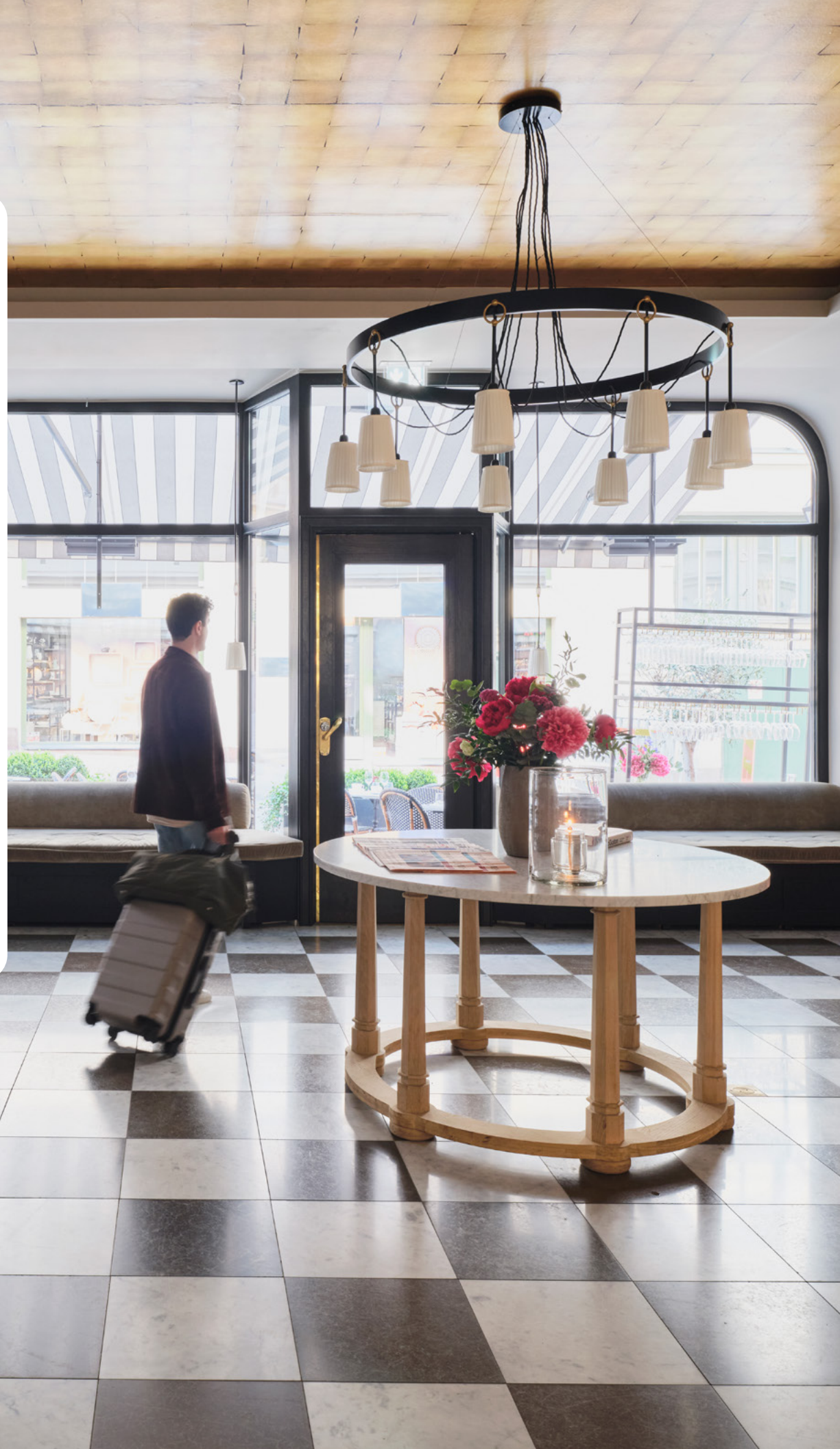
Also rising is the number of travellers combining business with holiday. Flexcations or a trip where you work remotely for at least some portion of your leisure trip, have seen the biggest increase, with 44% planning for a flexcation trip in the next 12 months.

More people are also including holiday at the start or end of their business trips, as 42% of consumers are planning bleisure travel in the next 12 months, an increase from 29% in 2022¹¹.

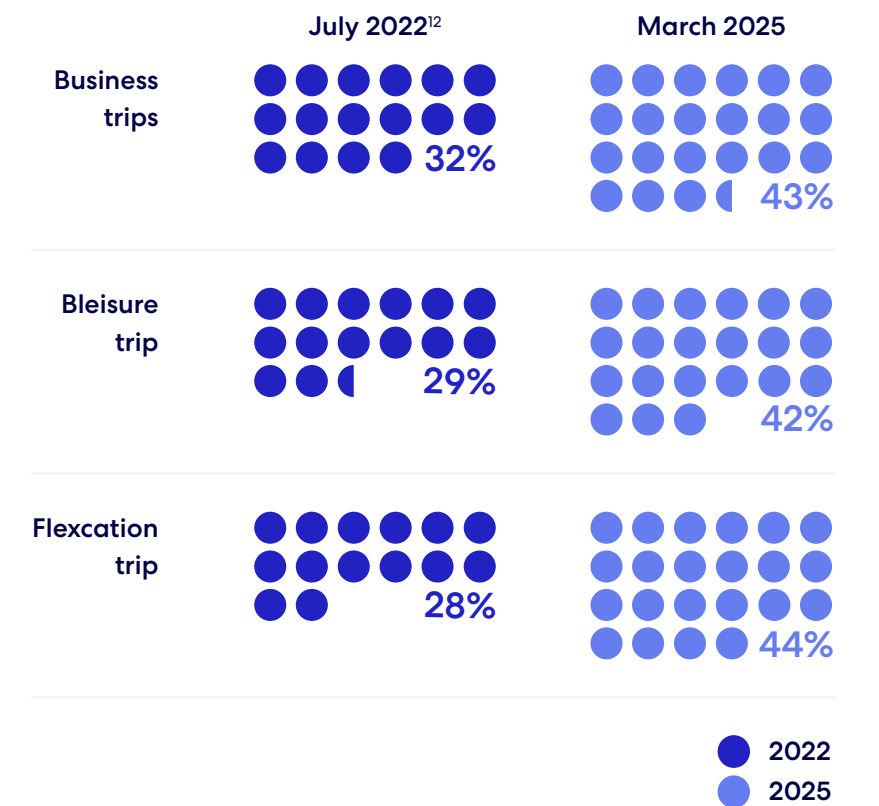


Who's taking a flexcation?

The trend is most common among partially or fully remote workers and those under 40, with 72% and 58% of these groups planning a flexcation trip, respectively.



TRAVEL PLANS IN THE NEXT 12 MONTHS



TAKE ACTION

To meet the needs of these evolving travellers, make sure your business is set up to accommodate business, bleisure and flexcation travellers alike. For lodging and airline partners, this means prioritising mid-week availability, offering strong, reliable Wi-Fi and setting up your property with adequate working spaces.

Travellers are spending more, just not all in one place

With more travel plans for the coming 12 months, travellers have a higher overall travel budget.

51% of consumers are increasing their travel budget for the next year.

This doesn't mean travellers are planning to be frivolous. In fact, the opposite. With people planning more trips, they may have a smaller budget for each individual trip.

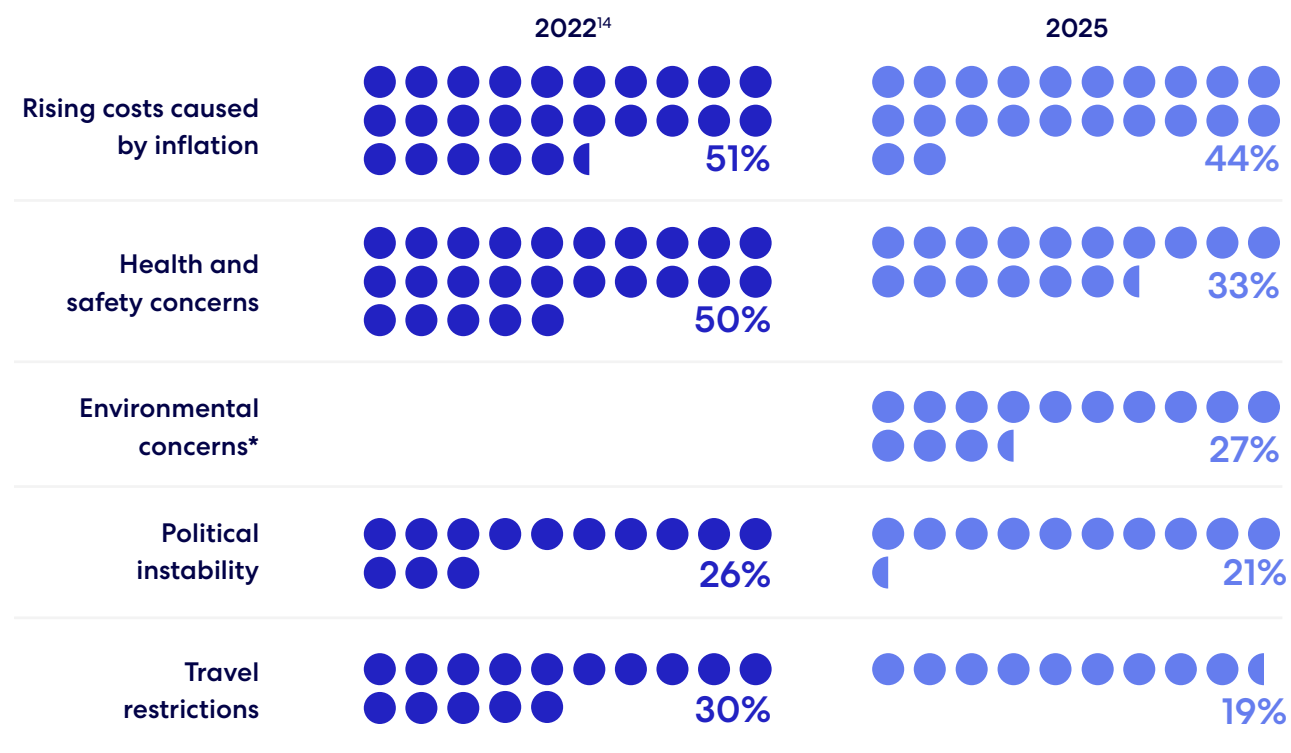
58% anticipate being more price conscious in the next 12 months than they were in the past year and only 9% said they are planning to be less cost-conscious.

The culprit behind price sensitivities? Inflation. When asked about the biggest factors impacting travel plans in the next 12 months, 44% of respondents said inflation. While this is a slight decrease from 2022¹³, inflation is still by far the most pressing concern impacting travel plans in 2025.



FACTORS IMPACTING TRAVEL

Inflation remains the top concern impacting travel plans



*Note that environmental concerns was a new addition to the 2025 survey

¹⁴ Expedia Group, 2023 Traveller Value Index

The impact of inflation is even more prevalent in Brazil (64%), Australia (63%), Canada (60%) and the US (55%).

For the first time, we asked consumers if environmental concerns impacted travel plans. Our study shows that it is a concern for 27% of respondents, which rises to 33% for those under 40.

Political instability concerns have decreased slightly since 2022. Countries where it is a larger concern when this survey was taken in February–March 2025, include Canada (30%) and China (27%) where, at the time of publication, the impact of emerging trade tariffs with the US is emerging but is yet to be fully realised.



TAKE ACTION

Natural disasters are increasingly affecting travel, so planning ahead is crucial. Learn how to prepare your business, minimise last-minute cancellations and keep you and your travellers safe.

[Read the blog](#)



CHAPTER 03

Price is critical, but it's not everything

The Traveller Value Index shows a measure of what consumers value when booking travel. In our 2023 report, consumers made it clear that price was by far the most important factor, followed by the ability to get a full refund and enhanced cleaning.

Our Traveller Value Index shows how consumer rank decision-making factors including:

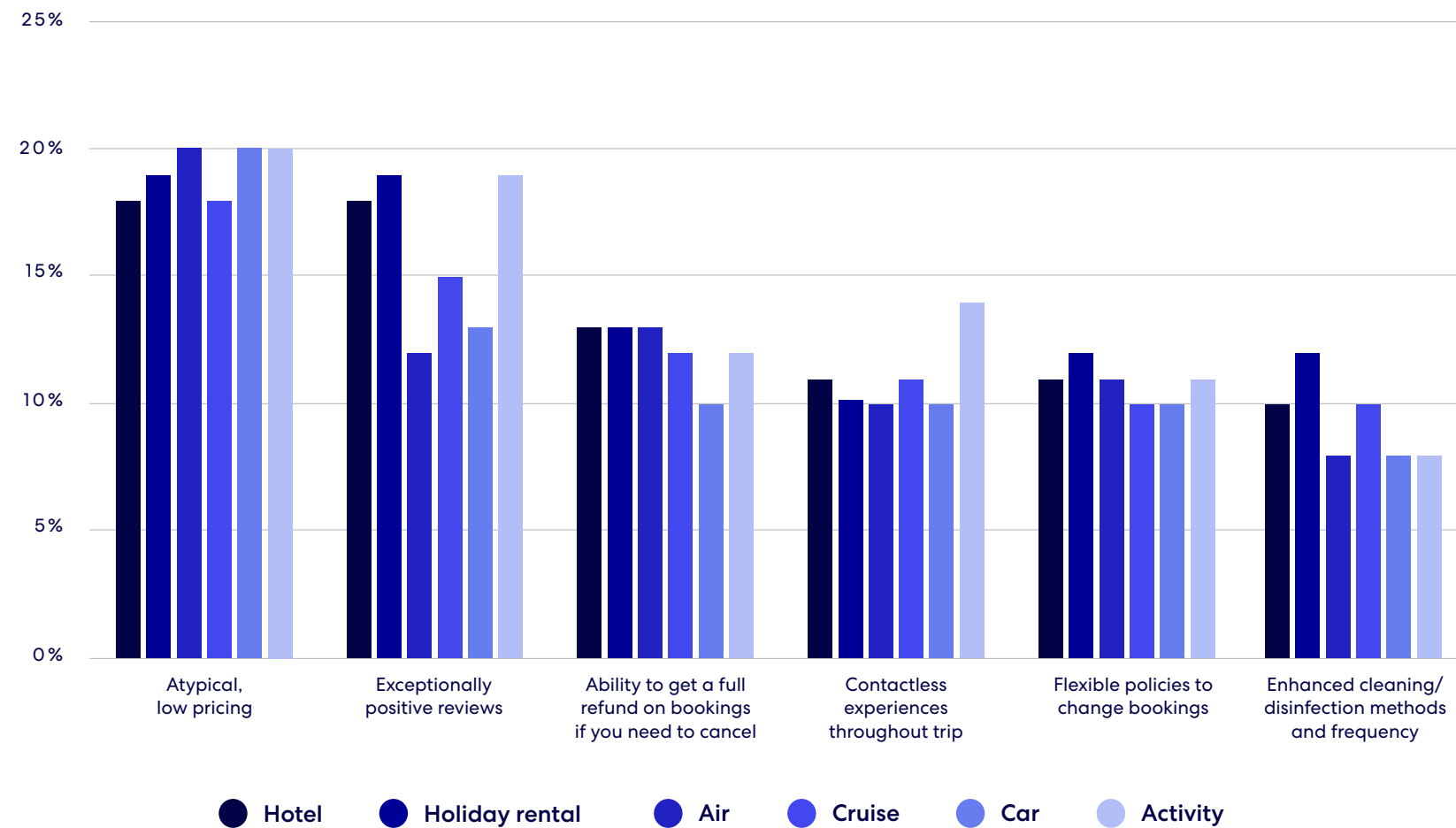
- Ability to get a full refund on cancelled bookings
- Atypical, low pricing
- Flexible policies to change bookings without fees or penalty
- Enhanced and frequent cleaning/disinfection methods
- Contactless experience throughout trip
- Premium, first-class benefits and upgrades
- Environmentally-friendly policies
- Reviews from other travellers *New for 2025*

This year, while cost remains important, the way travellers define "value" is shifting. Travellers aren't just looking for the lowest price, they're looking for quality, assurance and flexibility when booking their trips.



TOP VALUES WHEN BOOKING TRAVEL

Price and positive reviews are valued highest when booking travel



Reviews hold just as much importance as price when it comes to booking hotels, holiday rentals and activities. Travellers want to feel informed from real people before making a decision. This shift highlights the growing influence of social proof and the need for businesses to build trust through positive guest experiences.



Prioritising trust

For those under 40, reviews are more important than price when booking hotels, holiday rentals, tours and cruises. Keep reading to discover how much they're willing to pay extra for brands with trusted reviews.

At the same time, flexibility is still a top priority. Especially amidst economic uncertainty, travellers want the ability to cancel with confidence. Refundable bookings continue to be a major consideration, especially for hotels, holiday rentals and flights.



TAKE ACTION

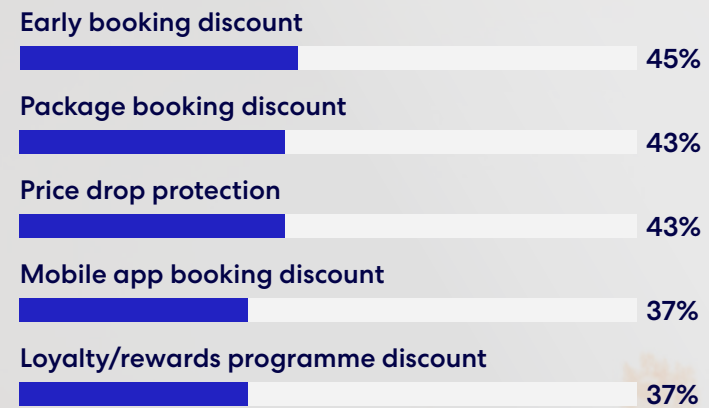
Businesses that offer clear and flexible cancellation policies will have a competitive edge in attracting these price-conscious travellers.

Deals that land

With travellers being price-conscious, promotions provide our partners with a way to stand out. Which deals are most likely to entice travellers? That depends on what type of travel they're booking.

MOST APPEALING PROMOTIONS

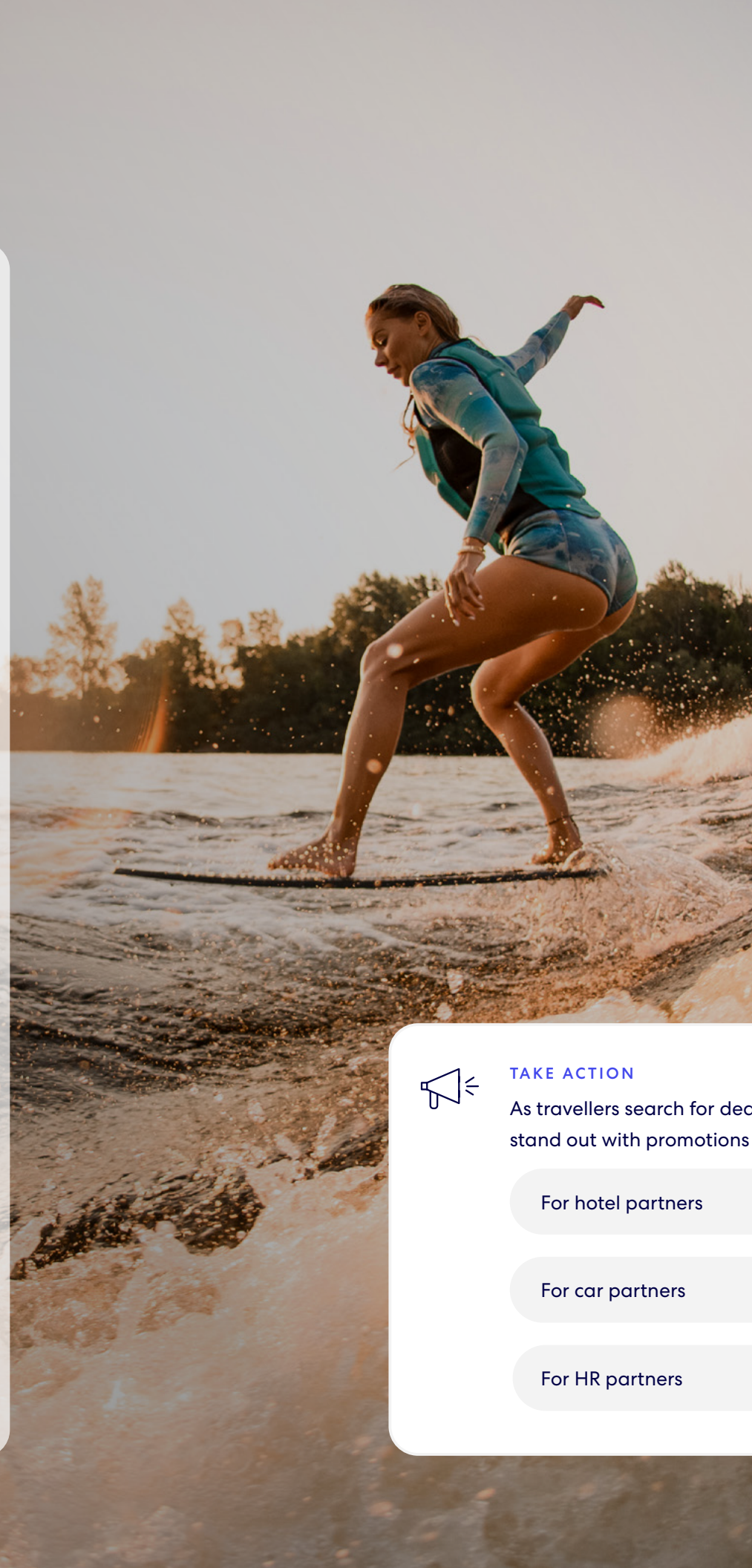
HOTEL PROMOTIONS



HOLIDAY RENTAL PROMOTIONS



AIR/CAR/ACTIVITY PROMOTIONS



Early booking discounts are popular for hotels and holiday rentals, whereas complimentary add-ons are typically more enticing for travellers booking airfare, car hire and activity bookings.

Package deals are popular among travellers planning to book a hotel in the next 12 months. Our survey found that 50% of consumers consider a discount for booking a package deal appealing—the most popular of all the options.

Looking at people planning three or more trips in the next 12 months, they're more interested in discounts associated with loyalty and rewards programmes to build up their points.

The data shows that consumers are looking for a variety of deals and discounts—and these can differ based on the unique circumstances of their trips. So, ensuring your brand has a diversified strategy for promotional offerings is essential to standing out among the competition.



TAKE ACTION

As travellers search for deals, here are the sources to help you can stand out with promotions on Expedia Group sites:

[For hotel partners](#)



[For air partners](#)



[For car partners](#)



[For activity partners](#)



[For HR partners](#)



Popular packages

We've seen that packages have a strong appeal for price-conscious travellers. The data also shows 69% of travellers already combine their hotel purchases with air, vehicle or activities.

When booking a package, travellers are looking for flexibility and are very likely to purchase the following:

57%

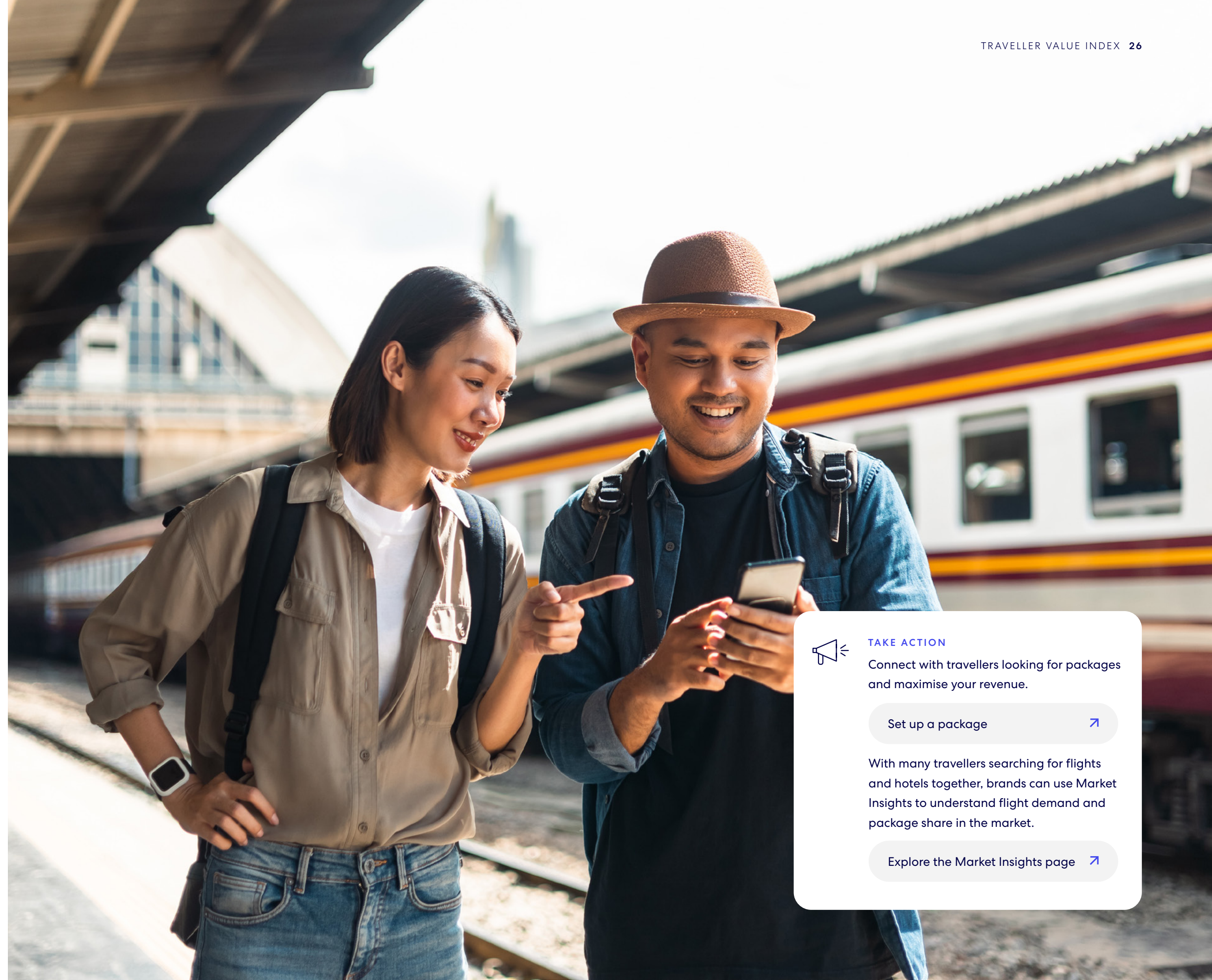
Customisable package

52%

Pre-built/bundled package from an online travel site

50%

Pre-built/bundled package from a travel planner that just sells holiday packages



TAKE ACTION

Connect with travellers looking for packages and maximise your revenue.

Set up a package



With many travellers searching for flights and hotels together, brands can use Market Insights to understand flight demand and package share in the market.

Explore the Market Insights page



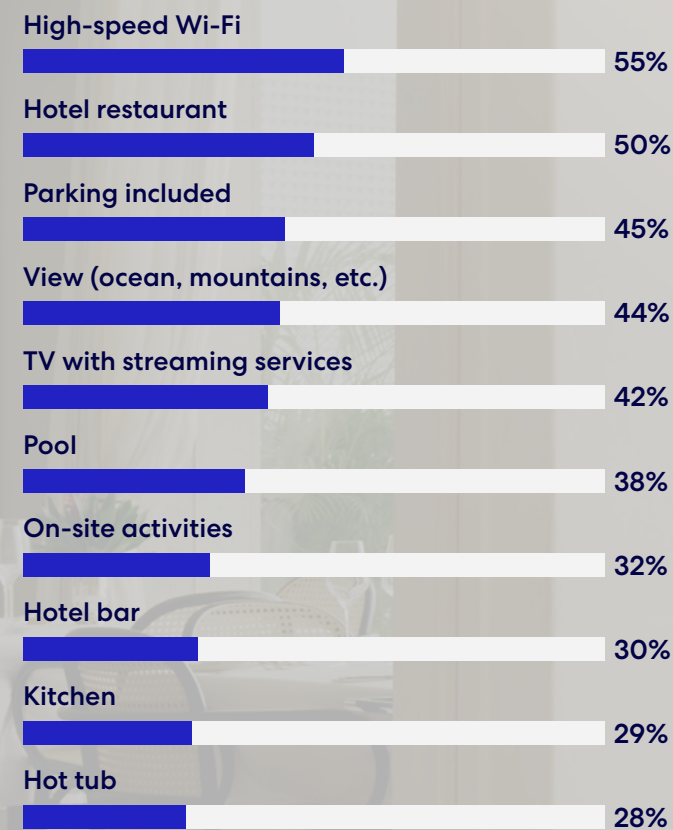
The most in-demand amenities

To deliver a strong traveller experience, providing the most-wanted amenities is essential.

The most-wanted amenities in hotels are high-speed Wi-Fi, restaurants and parking. Our [Unpack '25](#) spotted the Hotel Restaurant Renaissance trend as travellers crave distinctive or top-rated hotel dining experiences. For consumers booking holiday rentals, the top amenities expected are climate control, high-speed Wi-Fi and enhanced cleaning.

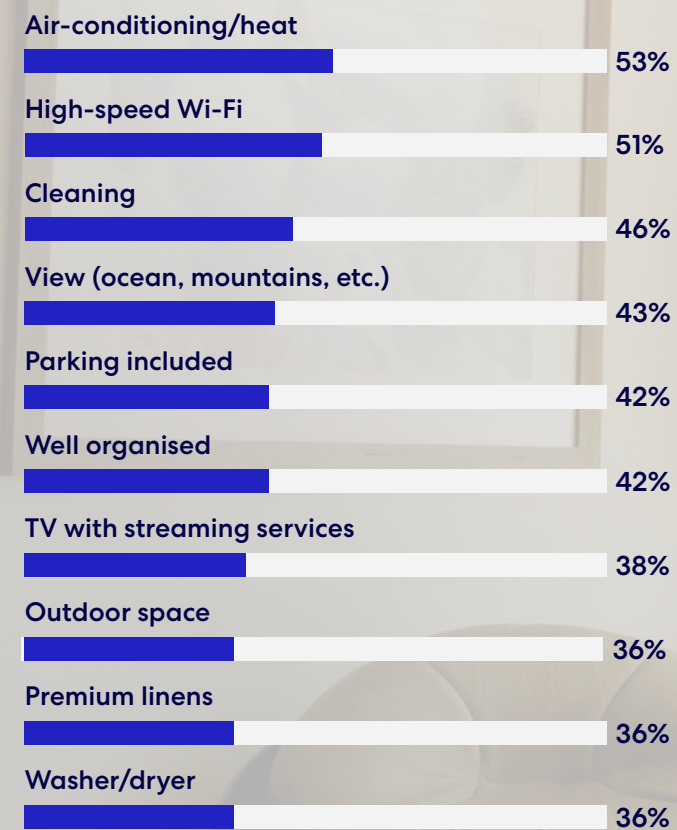
MOST POPULAR HOTEL AMENITIES

High speed Wi-Fi and hotel restaurants are popular amenities for hotel.



MOST POPULAR HR AMENITIES

AC/heat and high-speed Wi-Fi are popular amenities for holiday rentals.



TAKE ACTION

Optimise your listing for travellers looking for the most-demanded amenities.

[Tips for hotels](#)



[Advice for holiday rentals](#)



CHAPTER 04

Trust and consistency change the game

A recurring theme present throughout the data is trust. Travellers must trust the brand before booking travel

Reviews are an important part of building trust in a brand, particularly in lodging. When asked specifically about reviews, the data shows:

76%

of consumers would pay more for a **hotel with better customer reviews**

and 25% would pay a lot more.

75%

of consumers would pay more for a **holiday rental with better customer reviews**

and 24% would pay a lot more.





Younger travellers value reviews

Those under 40 not only put more value on reviews, 80% are more likely to pay more for a hotel with better reviews and 79% would pay more for a holiday rental.

This shows investing in reviews will pay dividends in the long term.

In addition to reviews, travellers want assurances that the place they're booking has a history of delivering great traveller experiences consistently.

85% of consumers would be more likely to book a hotel or holiday rental that has been proven to consistently deliver great traveller experiences when other factors are equal

and 39% would be a lot more likely.



TAKE ACTION

Learn how to get more reviews for your property, confidently respond to feedback and discover how you can use reviews to enhance your marketing and guest outreach strategy.

Our VIP Access and Premier Host programmes are set up to give travellers strong validation that your property offers strong traveller experiences—solidifying the trust travellers need.

[Learn about VIP Access](#)



[Check out the blog](#)



[Discover how to qualify for Premier Host](#)



CHAPTER 05

The impact of social media is surging

The influence and trust of social media in the travel industry has surged over the past few years. Our research found that 61% of travellers cited social media as a source of travel inspiration, a big increase from 2022¹⁵.

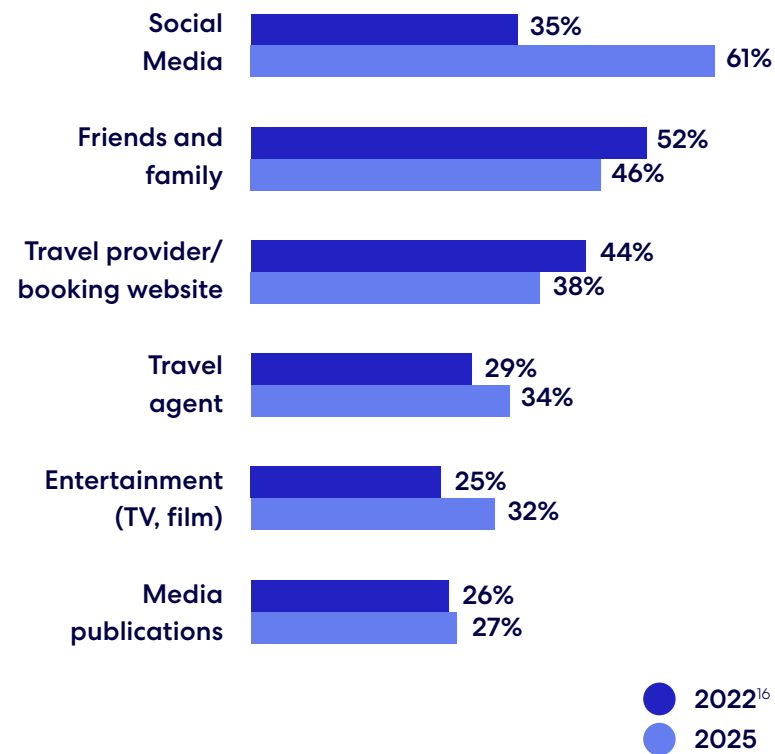
When it comes to what type of social media is providing inspiration, the data shows travellers look to a variety of sources. The most popular source for consumers was family and friends' social media accounts (30%), followed by travel-focused social media influencers (28%), social media accounts from brands (25%) and non-travel social media influencers (17%).



¹⁵ Expedia Group, 2023 Traveller Value Index

SOURCES OF TRAVEL INSPIRATION

Social leads for travel inspiration



*Note that the question options differed slightly and the 2025 social media data is a net of several social media options.

Younger travellers turn to social
71% of travellers under 40 say they use social media for inspiration.

Consumers are also increasingly turning to social media for information on where to book, up to 59%, a steep increase from 32% in July 2022¹⁷.

More consumers (32%) are also looking to entertainment as a source of travel inspiration (up from 25% in 2022¹⁸). Our [Unpack '25](#) data outlined a Set-Jetting Forecast to reveal what entertainment-inspired destinations travellers will head to in 2025.

¹⁶⁻¹⁸ Expedia Group, 2023 Traveller Value Index



DESTINATIONS INSPIRED BY ENTERTAINMENT INCLUDE:

- Dubai, inspired by 'The Real Housewives of Dubai'
- Montana and Wyoming, inspired by 'Yellowstone'
- New York City, inspired by 'And Just Like That...'
- Cape Town, inspired by 'One Piece'
- Scotland, inspired by 'The Traitors'



TAKE ACTION

Want to reach audiences inspired by the latest show? Expedia Group's media planning team has secured media partnerships with major players such as Netflix and Disney+ so our partners can meet the traveller at all junctures of their shopping path.

[Explore advertising solutions](#)

Entering the influencer era

As social media rises in importance, the impact of influencers on travel recommendations has grown.

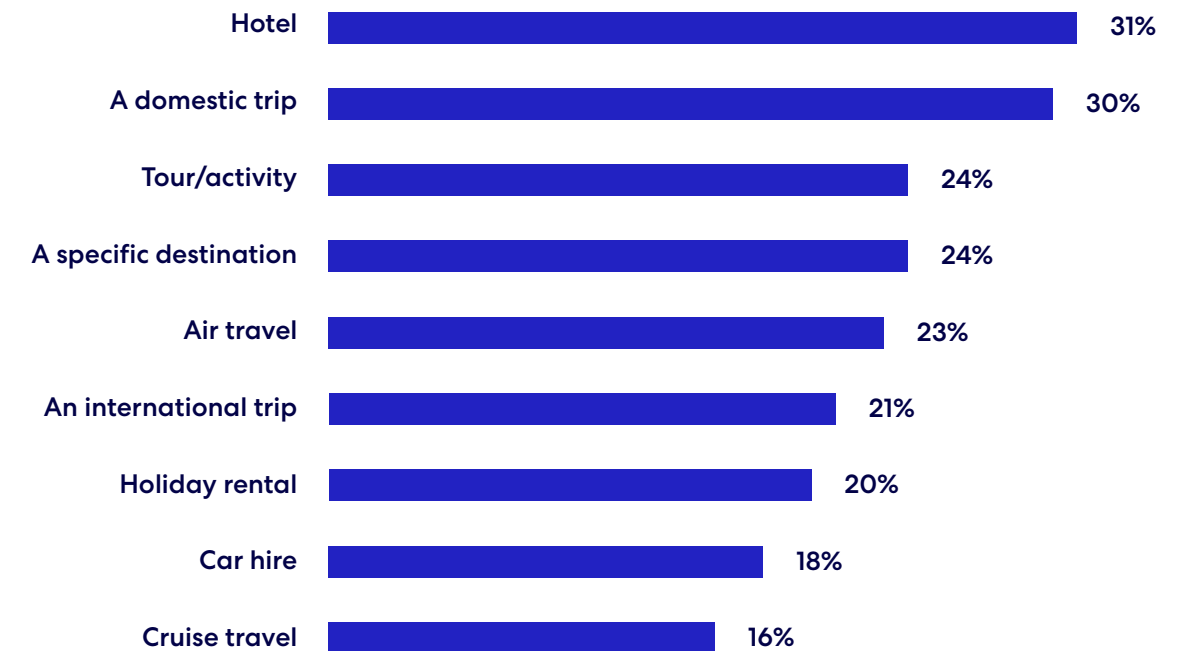
73% of consumers have had an **influencer recommendation** influence their decision to book a travel element or trip in the past.



84% of those under 40 have had influencer recommendations influence their decision to book travel in the past.

TRAVEL TYPES BOUGHT BASED ON INFLUENCER RECOMMENDATION

Hotels and domestic destination trips are the most popular travel types bought based on influencers.



74% of consumers would likely purchase a travel package based on an influencer's recommendation and most are open to full trip-planning from influencers. And when looking at interest in brand recommendations, the data is even stronger.

83% of consumers would be likely to purchase a travel package based on the recommendation of a brand they like

and 40% would be very/extremely likely.



TAKE ACTION

Partner with our award-winning creative team, E Studio, to craft innovative social and influencer campaigns. Or, discover how your brand can leverage personalised storefront and curated content through Travel Shops.

[Work with E Studio](#) ↗

[Explore Travel Shops](#) ↗

CHAPTER 06

Travel booking is evolving

Consumers will book where and when they want to, as long as it's through a trusted platform. The data shows which options consumers ranked as the most likely for them to book through:

1. A travel provider they know and trust
2. A non-travel provider (like a credit card or retailer) they know and trust that's powered by a well-known travel brand
3. A non-travel provider they know and trust
4. A non-travel provider they aren't familiar with

While traditional travel brands are still the most popular option, many consumers are interested in booking through non-travel providers.

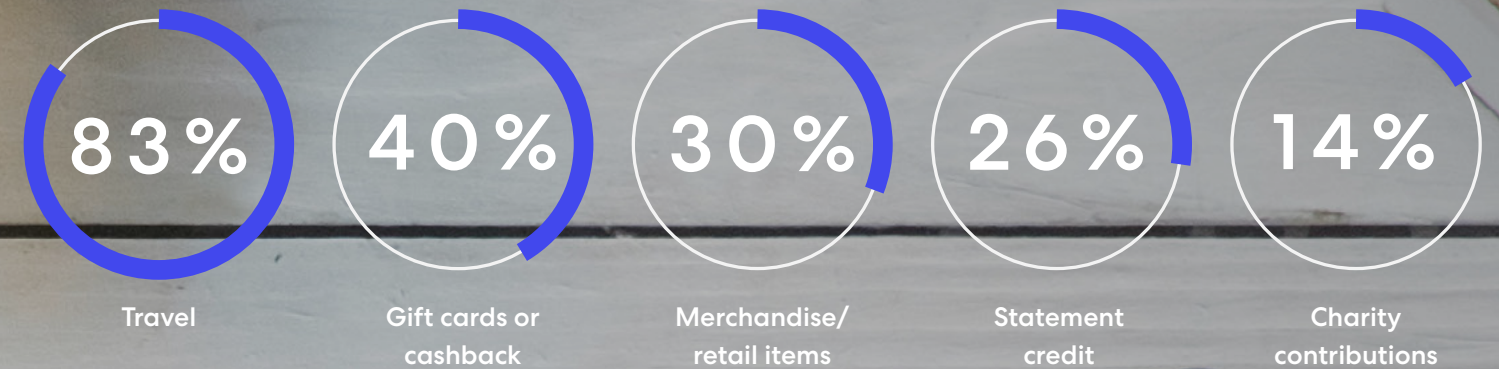
82% of consumers are interested in **booking travel through a non-travel loyalty programme** they belong to

and 43% are very or extremely interested.

The driver for this is loyalty programmes, as consumers hope to earn and redeem loyalty points for travel. In fact, travel is the top choice for how consumers redeem loyalty points. Maybe this shouldn't be a surprise as travel creates strong emotional connections across generations and is inherently tied to unique, unforgettable experiences.

WHAT CONSUMERS WANT TO REDEEM LOYALTY POINTS FOR

Travellers are overwhelmingly looking to redeem points on travel



TAKE ACTION

Rapid API provides instant access to our full lodging supply, competitive rates and industry-leading support.

[Learn about Rapid API](#)



Our White Label Template solution can help you generate new revenue streams and build loyalty by providing access to our end-to-end travel options.

[Discover White Label Template](#)



CHAPTER 07

How to take action

The future looks bright and exciting for the travel industry. Travel has become even more important for consumers and they're planning more frequent trips and increasing their travel budget.

There are opportunities for travel brands to cater to these evolving traveller preferences, such as prioritising reviews, offering package deals and leveraging influencer-driven inspiration to promote the brand.

Brands that do rise to these challenges will grow and flourish.



Here's a recap of the key findings and how your brand can take advantage:

Increase visibility to reach eager travellers

To boost visibility on Expedia Group sites, we recommend [Accelerator and TravelAds](#) or [Flights Sponsored Listings](#).

Appeal to the price-sensitive customer

Stand out to travellers with promotion or package offerings on our Expedia Group sites. Learn more about the [best solutions for your business](#).

Develop trust with travellers

Focus on your guest experience to build trust with travellers by setting up [VIP Access](#) qualifying for [Premier Host](#).

Optimise for the most-wanted amenities

Update your listing for travellers looking for the most-demanded amenities with these [tips for hotels](#) and [advice for holiday rentals](#).

Stay relevant through social

Partner with influencers with a personalised storefront and curated content with [E Studio](#) and [Explore Travel Shops](#).

Increase brand loyalty

Allow consumers to redeem loyalty points on travel with [Rapid API](#) or [White Label Template](#).

CHAPTER 08

Methodology

Expedia Group's 2025 Traveller Value Index Survey was conducted by Wakefield Research among 11,000 representative general population adults age 18+ across 11 key markets: US, Canada, China, Mexico, Brazil, UK, France, Germany, Italy, Japan and Australia, between 14 February and 3 March 2025, using an email invitation and an online survey. The data has been weighted to ensure an accurate representation of representative adults age 18+.

We make comparisons throughout to data from July 2022 (our [2023 Traveller Value Index](#)), which also surveyed 11,000 consumers across 11 key markets: US, Canada, Mexico, Brazil, UK, France, Germany, Japan, Australia, South Africa and South Korea. Note that there are two countries that differ between the surveys.



