

2024 Deloitte holiday travel survey

More time away from home for the
holidays, as travel enthusiasm climbs



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Flight Status

On time

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Executive summary

At the surface, the 2024 holiday travel season looks a lot like 2023. Just under half of Americans surveyed plan to travel, with 19% visiting friends and relatives only, and 30% planning to stay in paid lodging. But other key metrics are up significantly: **the average number of trips appears set to climb, and more Americans are planning vacations of a week or longer** (33% versus 25% in 2023). With more and longer trips, budgets are up as well.

Bolstering these more ambitious plans is an optimistic financial outlook: 37% of Americans say their finances improved over the past year, compared to 31% in 2023. **An elevated prioritization of travel also appears to be at play:** Among Americans with increased budgets, 4 in 10 say it is because “travel has become more important to me.”

When they spend more, travelers are increasingly leaning into the *experience* of travel. The **share splurging on upgraded airfare or more luxurious lodging climbed significantly**. This spend looks likely to find its way to a variety of travel providers, as intent rises across hotels, private rental, air, car rental, and cruises.

While positive trends exist across income levels, high-income Americans are expected to account for an outsized jump in travel spend: 35% plan to take three or more trips, compared to 19% in 2023. And international trips are in high demand—the **share of high-income Americans going abroad for their longest trip of the season has risen to 42%, from 29%**.

Young travelers also are showing high enthusiasm. Gen Zers account for 14% of Americans planning trips, up from 8% in 2023. And across generations, **millennials have the biggest planned increase in trip spend and frequency**, by a significant margin.

As the season approaches, travel suppliers would be wise to remember that with big budgets come big expectations. Ensuring that staff and systems are well-prepared to keep up with demand—even as the season brings its tradition of intense peak travel days—will be as crucial as ever.

About the survey

Methodology

An independent online research panel was used to survey 4,074 Americans, represented by age, income, gender, and geographical region. Of these, 2,005 respondents who are planning to travel between Thanksgiving and mid-January qualified as holiday travelers. The survey has a margin of error of plus or minus two percentage points for the entire sample. It was fielded from September 17 to September 23, 2024.

Definitions

Income tiers

High-income respondents are those with household income of \$100,000 or more; **middle income**, \$50,000-\$99,999; **low income** under \$50,000.

Generations

Baby boomers born between 1946 and 1964; **Gen X** born between 1965 and 1979; **millennials** born between 1980 and 1996; **Gen Z** born between 1997 and 2012.

Laptop luggers and disconnectors

Among the respondents, 1,401 travelers are employed full time, part time, or on a contract basis. Those who plan to work during their longest trip of the season are considered **laptop luggers**. Those who do not plan to work are **disconnectors**.

Thank you

The authors would like to thank **Rohith Alluri Reddy** and **Anand Kumar** for their contributions to this report.

Key findings

Travel incidence is similar, but other metrics indicate substantial growth

Feeling better about their finances, and placing a high priority on travel, Americans have big plans to be on the go this holiday season. About half plan to travel, similar to 2023. But the average number of intended trips has increased from 1.88 to 2.14. And 64% say they will travel more than once, up from 57% in 2023.

High-income* and young Americans are the biggest drivers of travel this season: 14% of holiday travelers come from Gen Z, versus 8% in 2023; 45% have household income of more than \$100K, versus 38% in 2023.

Spend trends up as travel grows as a priority

Spend sentiment is up sharply for the holiday season. The percentage who plan to significantly increase the budget for their longest trip (compared to the previous year) jumped to 28%, from 18% in 2023. The biggest reason cited for that increase? “Travel has become more important to me,” cited by four in 10. The biggest groups planning increases are millennials (39%) and high income (35%).

Travelers intend to spread the extra dollars across their trips, as more plan to book international vacations and upgraded airfare, in addition to upgraded and better-located lodging.

Laptop lugging gets a lift

Nearly five years after remote work became a widespread reality, the share of travelers laptop lugging—working during their longest trip of the season—rose sharply, to half from one-third. While the high percentage of young and high-income Americans in the traveler pool helps boost that number, this behavior is up across all ages and incomes.

Laptop lugging has big bottom-line benefits for travel providers. These travelers plan an average of 2.7 trips over the holidays, versus 2.0 for those disconnecting. Their trips are also longer, and their budgets are higher.

High income and high enthusiasm

High-income Americans continue to expand their travel ambitions. In 2023, 59% of those with household income of \$100K or above planned to travel; this year, that is up to 66%. They will make up over half of paid-lodging travelers (52%), up from 43% in 2023.

These wealthier travelers also are ratcheting up their travel behavior compared to 2023, jumping from an average 1.9 trips planned to 2.5, and also spending more per trip. Half of those increasing spend cite the growing importance of travel to them personally.

*High income: household income (HHI) of more than \$100,000; middle income: HHI of \$50,000 to \$100,000; low income: HHI of less than \$50,000.

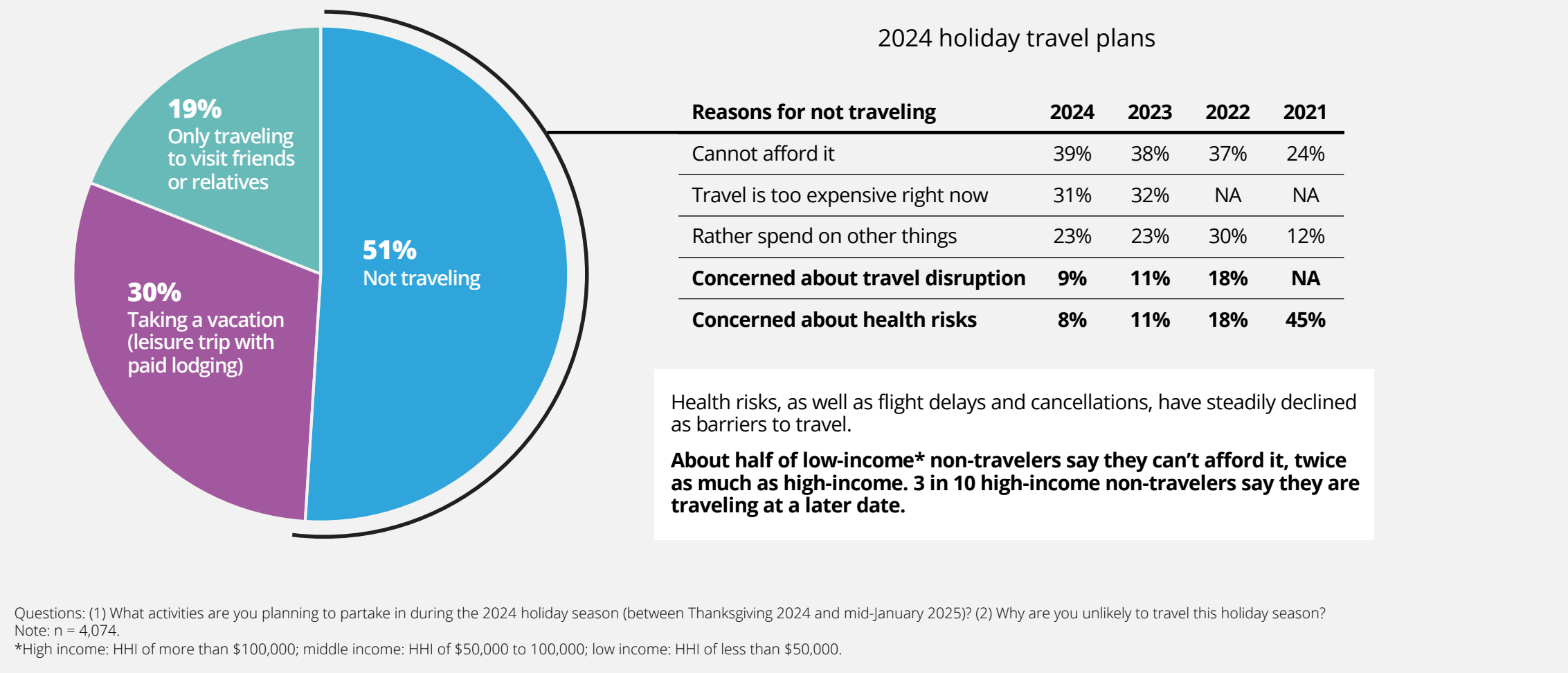
Holiday travel incidence, frequency and spend

The number of Americans traveling and the number staying in paid lodging are similar to 2023. But there are few similarities in trip frequency and spend. High-income and young Americans surveyed show particular enthusiasm for travel.



Nearly half of Americans plan to travel during the 2024 holiday season

49% plan to travel, essentially flat compared to 48% in 2023. Among non-travelers, financial concerns remain the top deterrent



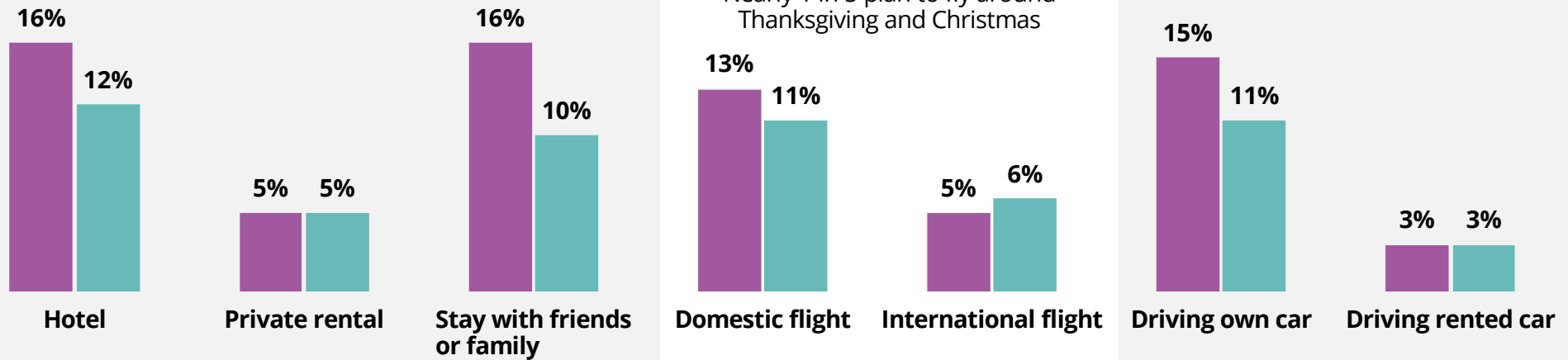
Three in 10 Americans plan to travel over Thanksgiving; one in four around Christmas

30% of Americans are taking a trip around Thanksgiving versus 28% in 2023

25% of Americans are taking a trip around Christmas versus 23% in 2023

Travel segment usage
(percentage of Americans traveling over key holidays)

● Thanksgiving ● Christmas



Question: What activities are you planning to partake in during the 2024 holiday season (between Thanksgiving 2024 and mid-January 2025)?; Which (if any) travel products do you plan to use?
Note: n = 4,074, n (Thanksgiving) = 1,235, n (Christmas) = 1,012.

High-income Americans' and Gen Z's share of the traveling public rise this holiday season

Traveling public mix by income and generation, 2024 holiday season



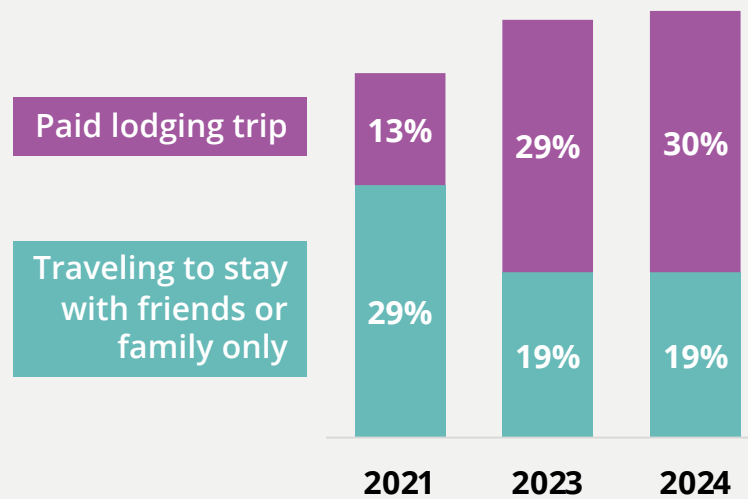
There is a **noted rise in holiday travel intent among high-income** Americans, from 59% in 2023 to 66% in 2024.

Intent among low-income Americans dropped slightly, from 36% to 34%.

Question: What activities are you planning to partake in during the 2024 holiday season (between Thanksgiving 2024 and mid-January 2025)?
 Note: n = 2,005.
 *High income: HHI of more than \$100,000; middle income: HHI of \$50,000 to \$100,000; low income: HHI of less than \$50,000.

Significantly more Gen Z and high-income travelers plan to stay in paid lodging

Americans staying in paid lodging versus with friends and family only



Generation and income groups as a share of paid lodging travelers

	2023	2024
Generations		
Gen Z	7%	13%
Millennials	32%	35%
Gen X	29%	26%
Boomers	29%	25%
Income groups		
High income*	43%	52%
Middle income	35%	32%
Low income	22%	16%

Question: What activities are you planning to partake in during the 2024 holiday season (between Thanksgiving 2024 and mid-January 2025)? n = 4,074.

*High income: HHI of more than \$100,000; middle income: HHI of \$50,000 to 100,000; low income: HHI of less than \$50,000.

Americans are taking more trips, the highest since travel resumed post pandemic, and spending more this holiday season

While the number of Americans traveling remains steady, they are taking more trips and spending more than in 2023

2.14

average trips, 2024 holiday season
versus 1.88 trips in 2023

37%

of Americans think they're doing better financially
versus 31% in 2023

Number of trips	2023	2024
More than 1	57%	64%
3+ trips	18%	25%
5+ trips	3%	6%

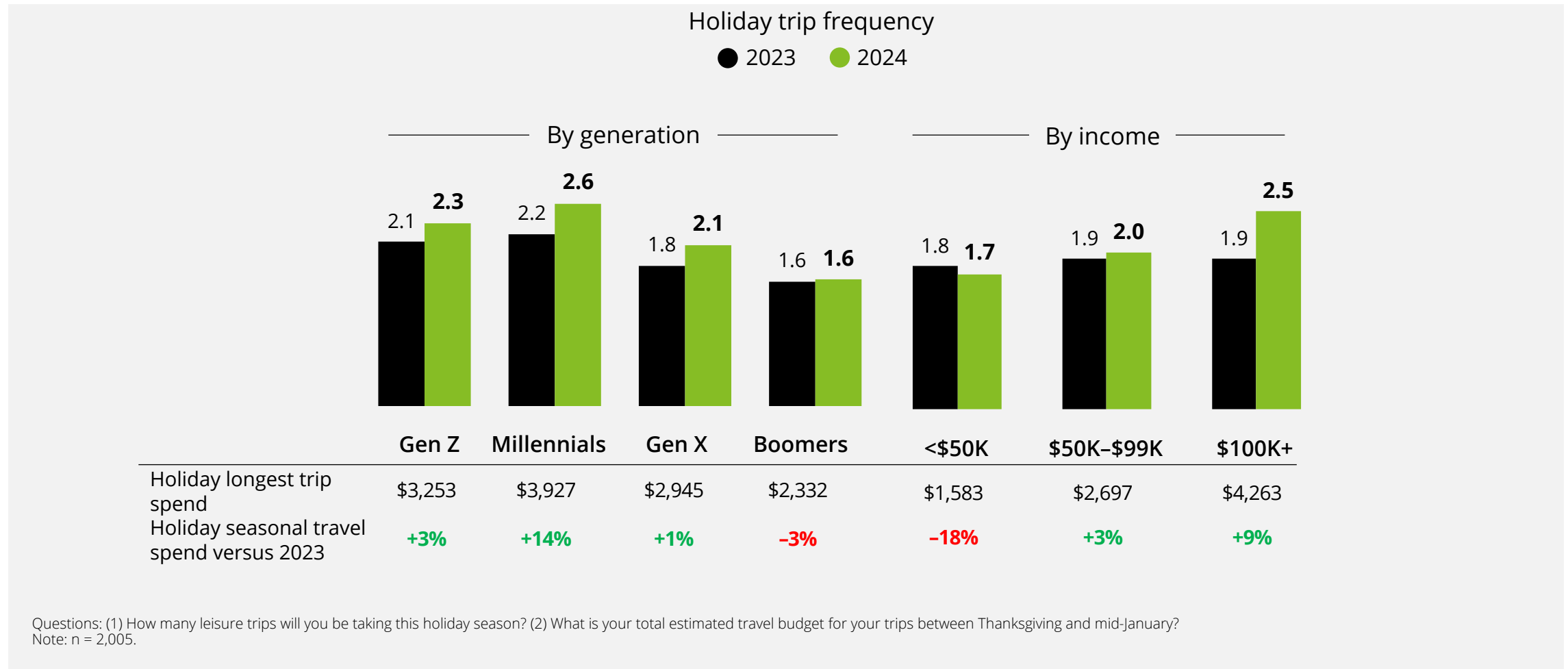
\$3,294

average longest holiday trip budget
Seasonal travel spending on transport and
accommodation is up by 4% from 2023

Questions: (1) What is your total estimated budget for this trip? (2) How does your current household financial situation compare to last year's? (3) How many leisure trips will you be taking this holiday season?
Note: n = 2,005.

Increase in trip frequency is almost entirely driven by high-income Americans. All generations aside from boomers plan for higher frequency and spend.

Low-income travelers are reducing their trip frequency and spend this holiday season



Big jump in travelers spending significantly more on their longest trip, and rise in importance of travel is the most-cited reason why

Longest-trip budget compared to 2023

16%

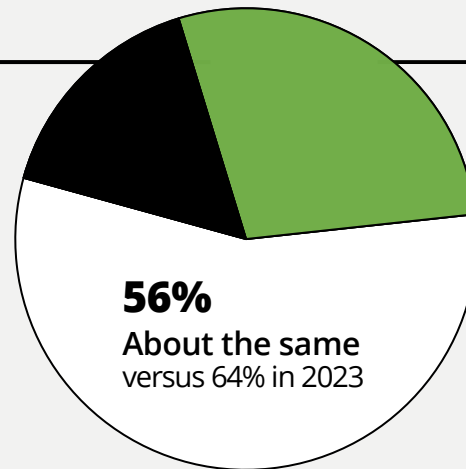
Significantly less
versus 18% in 2023

28%

Significantly more
versus 18% in 2023

Why less?

Financial concerns continue as the biggest drag on travel spend, cited by 57%, but down from 64%.



Why more?

4 in 10 travelers say they are spending more because **“travel has become more important to me”** versus 21% in 2023.

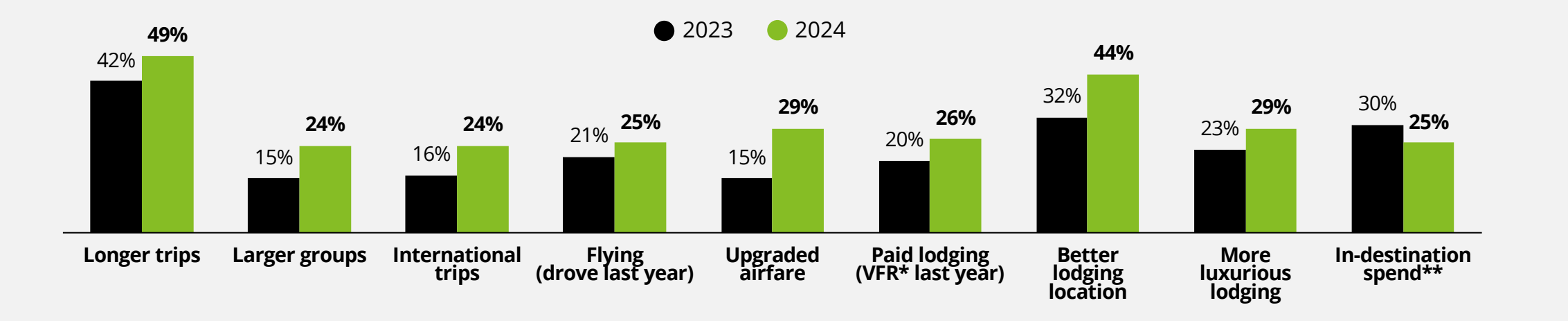
The major driving forces behind increased spend are **high-income travelers (35% increasing budgets)** and **millennials (39%)**. Half of budget increasers in each of these demographics cite **placing greater value on travel** as the reason for spending more.

Questions: (1) How does your budget for this trip compare to your budget for your longest trip of the 2023 holiday season? (2) What best describes why you are spending more/less on this trip than you did on your longest holiday trip in 2023?

Note: n = 2,005.

Higher spend likely to show up across trip characteristics, products, and amenities. Millennials in particular lean into upgrading the travel experience.

28% of travelers say they will significantly increase the budget for their longest trip. Where are they splurging?

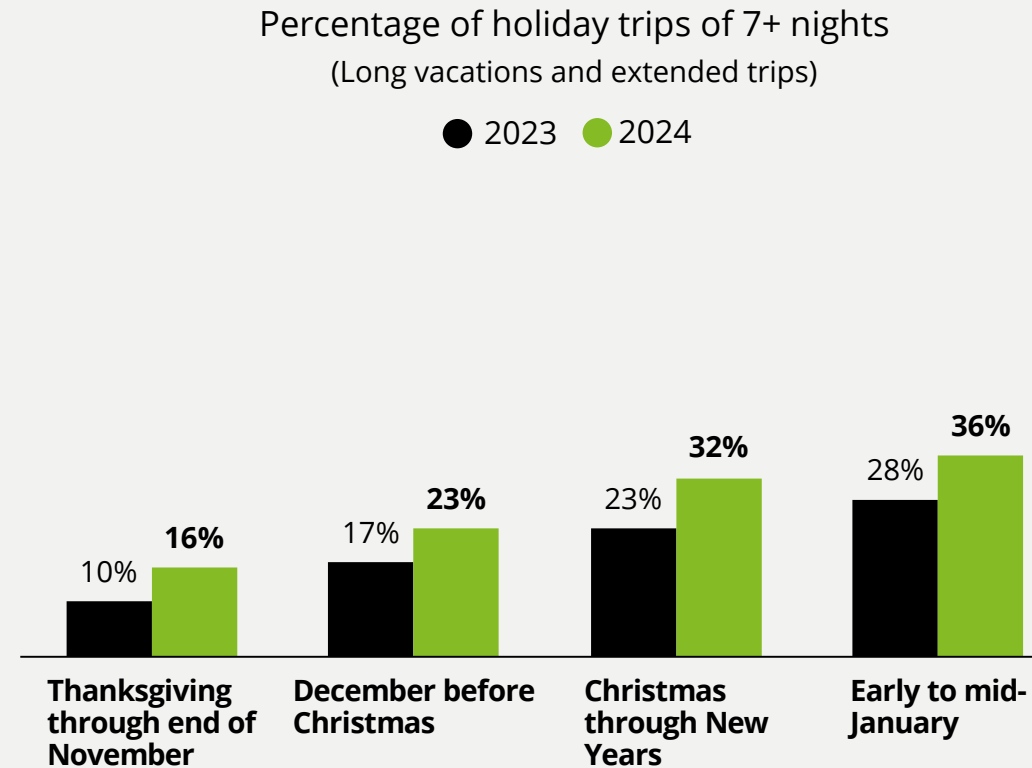
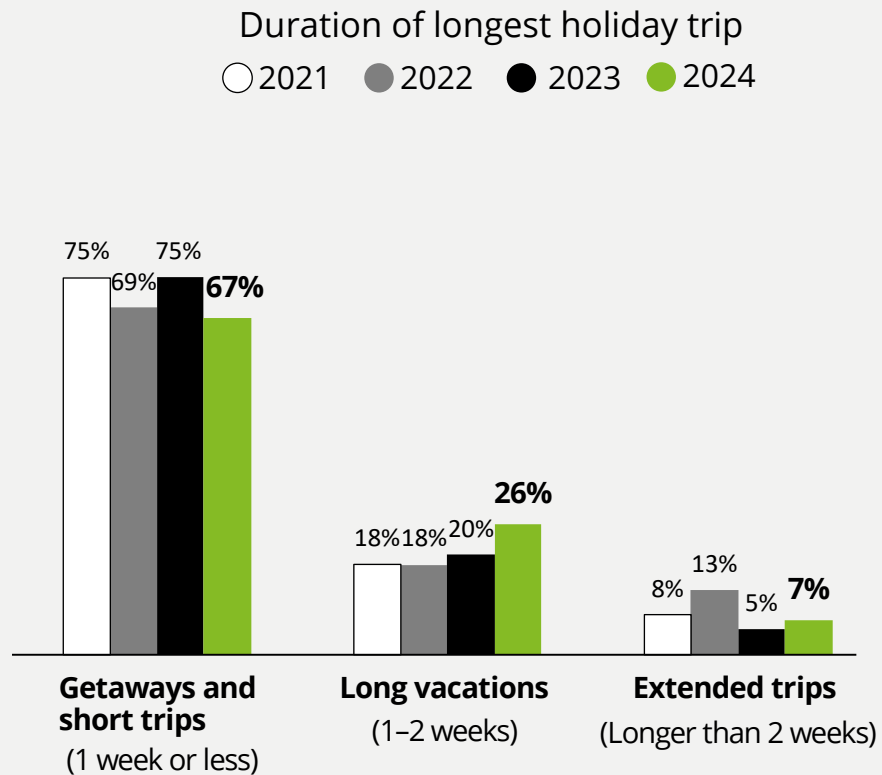


Areas where 30% or more say that increased spend will go, by generation

Gen Z	Millennials	Gen X	Boomers
Longer trip	Longer trip	Better lodging location	Longer trip
Better lodging location	Better lodging location	Longer trip	In-destination spend
	Upgraded airfare	More luxurious lodging	Better lodging location
	More luxurious lodging		More luxurious lodging
	International trips		

Questions: (1) How does your budget for this trip compare to your budget for your longest trip of the 2023 holiday season? (2) What best describes why you are spending more on this trip than you did on your longest holiday trip?
 Notes: n = 519. *VFR: Visiting friends and relatives. **Overall intent to visit attractions and do travel activities is up this year; see Slide 23 for more details.

Trip lengths are up across the season, as the share of travelers planning at least one trip of a week or longer reaches its highest point in the last four years.



Questions: (1) For this trip, how long do you intend to travel? (2) For your trips beginning in each of the following periods, how long are you traveling for?
Note: n = 2,005.

Travel products

With trip frequency up, suppliers across travel categories should see high demand over the holidays. From hotels to private rentals, and from flights to cruises, Americans say they will be busy exploring throughout the season.



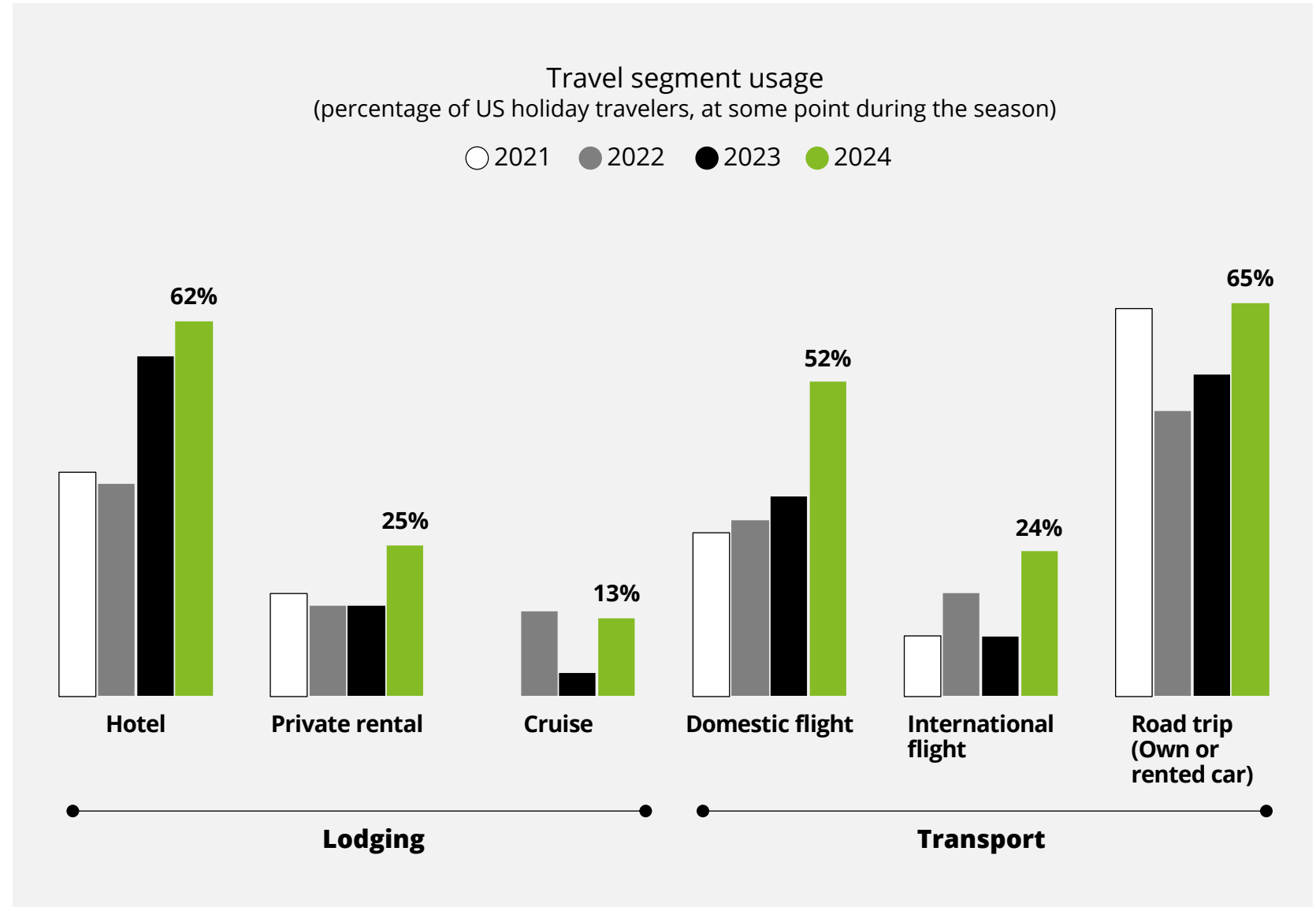
With frequency and trip length up, all product categories should see increased demand. Intent around flights and rentals is particularly buoyant.

More travelers are significantly increasing their budgets this year, and they are applying the extra spend across categories. Among the 28% increasing the budget for their longest trip:

24% are switching from domestic to international flights, versus 16% in 2023

26% switching from driving to flying, versus 21% in 2023

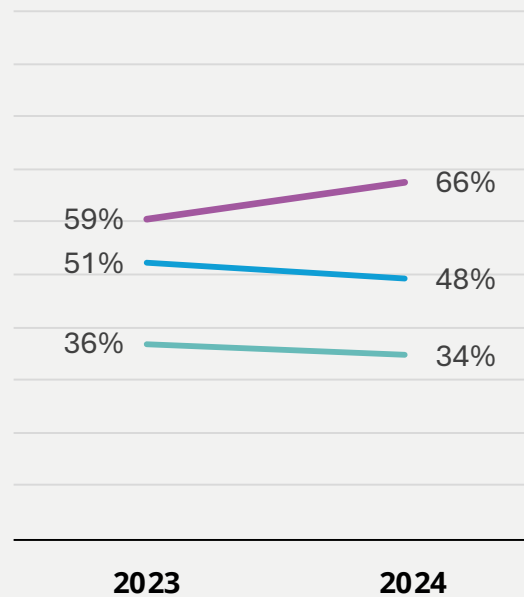
Question: Which (if any) travel products do you plan to use?
Note: n = 2,005.



A high-income travel boom is driving up demand across major travel product categories

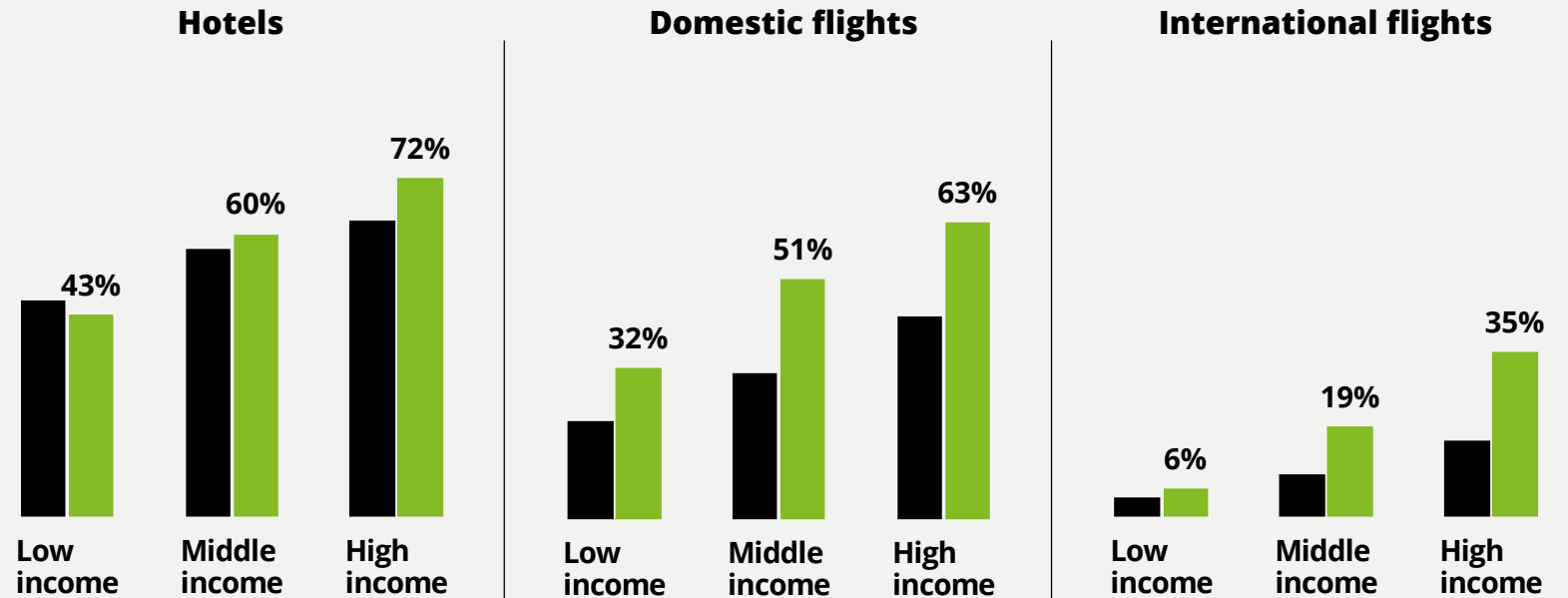
Travel incidence by income
(percentage of Americans traveling)

● Low income ● Middle income ● High income



Travel segment usage: By income
(percentage of US holiday travelers, at some point during the holiday season)

● 2023 ● 2024

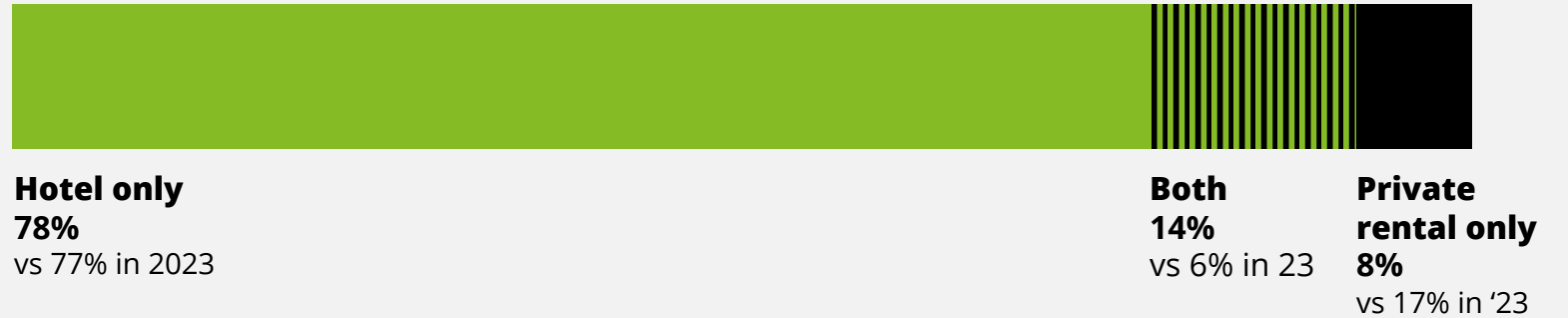


Question: What activities are you planning to partake in during the 2024 holiday season (between Thanksgiving 2024 and mid-January 2025)? Which (if any) travel products do you plan to use?
Notes n = 2,005; high income: HHI of more than \$100,000; middle income: HHI of \$50,000 to \$100,000; low income: HHI of less than \$50,000.

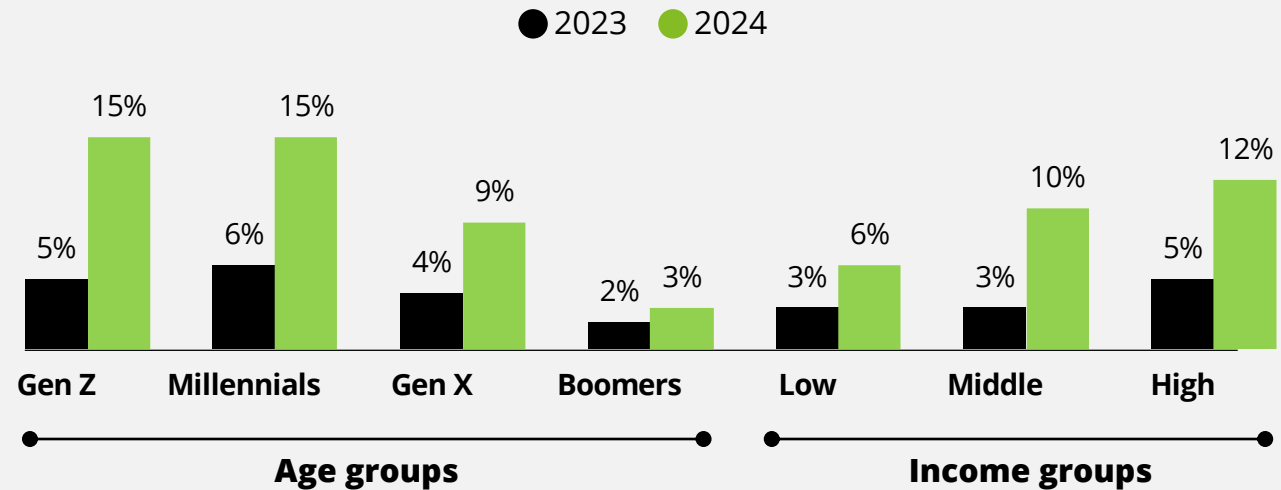
With trip lengths up, more plan to stay in both hotels and rentals on their longest trip.

Gen Z, millennial, and higher-income travelers—all groups planning more and longer trips—are the top drivers of increased mixing of hotels and rentals in the same trip.

Holiday season 2024: Paid accommodation split, longest trip



Percentage of travelers staying at BOTH hotels and rentals on their longest trip



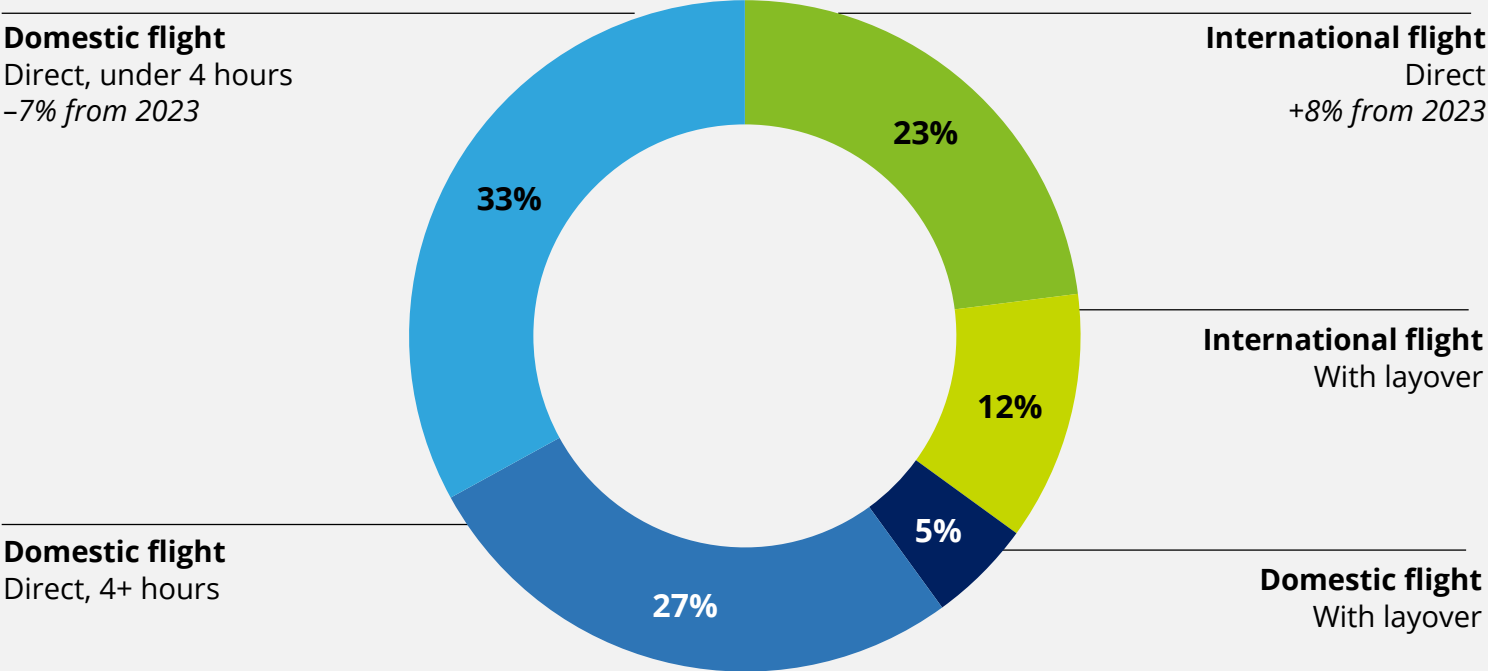
Question: Which (if any) travel products do you plan to use?
 Note: n = 2,005; n (paid lodging) = 1,475.

Intent to fly is high. Demand for direct international flights grows, while fewer respondents plan to fly short domestic routes for their longest trip.

59% of travelers will take a flight at least once during the 2024 holiday season

55% of travelers will take a flight on their longest trip of the season

Type of flight for the longest holiday season trip



Questions: (1) Which (if any) travel products do you plan to use? (2) Which of the following best describes your flight? (3) Thinking about the flight for your longest leisure trip this holiday season, if you could have ONE of the following for no extra cost, which would you choose?
 Notes: n = 2,005; n = 1,094 travelers flying on their longest trip.

International travel intent more than doubles over 2023, for the longest trip and across the holidays. One in four international travelers surveyed place a higher value on travel than they did last year.

24% of travelers will take an international trip at least once during the 2024 holiday season, up from 10% in 2023

19% of travelers will travel internationally for their longest trip of the season, up from 8% in 2023

International travelers travel more overall

45% more trips planned than domestic travelers across the 2024 holiday season

Europe and Canada see big bumps in visitation intent, led by boomer and millennial visitors

Destinations	2023	2024
Europe	27%	36%
Canada	5%	14%
Mexico or the Caribbean	29%	23%
Asia	14%	8%

High-income travelers account for much of the surge in Canada interest, suggesting that ski vacations may be a major draw. The percentage with income of \$100K+ planning to visit Canada has jumped from 7% to 16%.

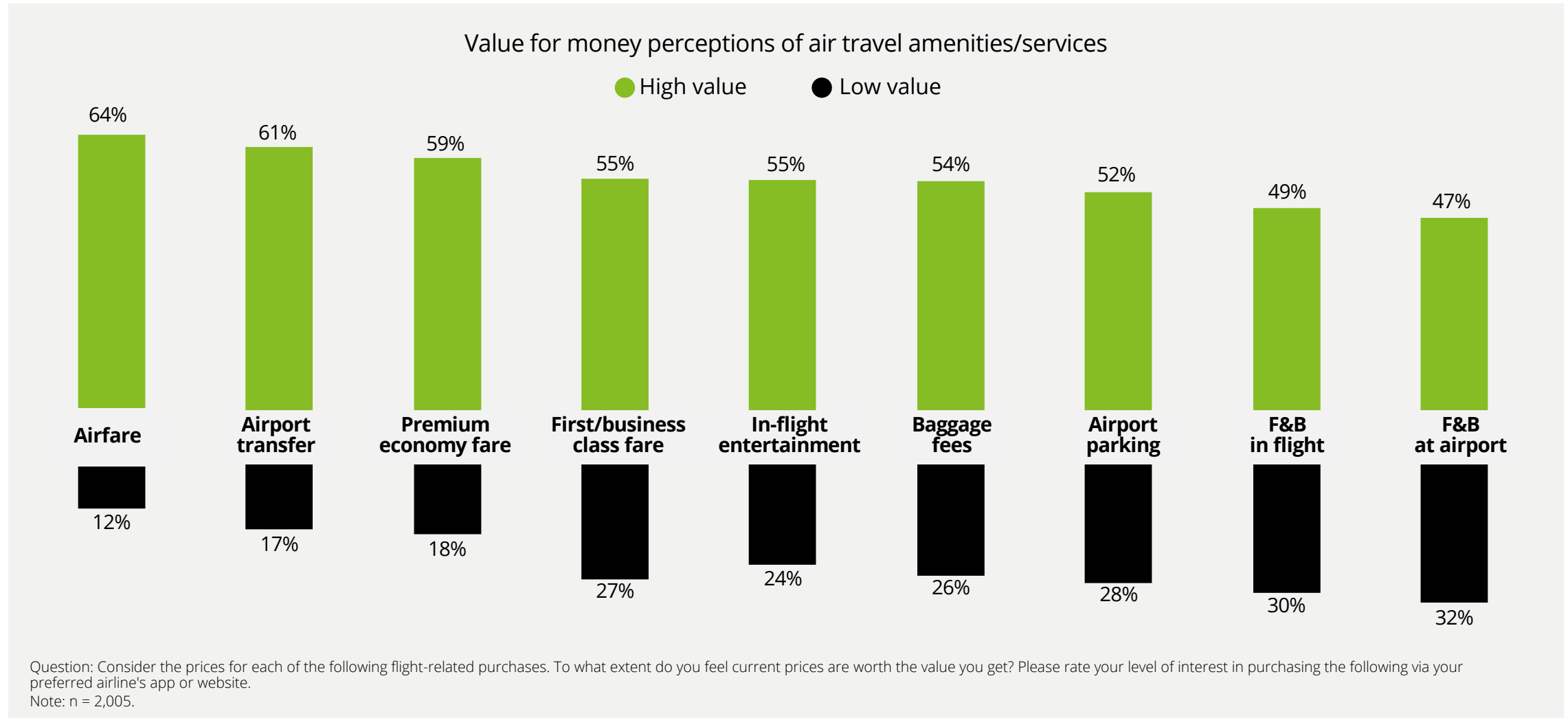
Increased spend going to upgraded travel experience more than in 2023

Where are international travelers spending more?

	2023	2024
01	Longer trip	Better lodging location
02	International trip over domestic	Longer trip
03	Better lodging location	Upgraded airfare
04	Staying at paid lodging	More luxurious lodging
05	Upgraded airfare	International trip over domestic

Questions: How many leisure trips will you be taking this holiday season? Which international region will you be flying to? What, if any, adjustments are you making versus last year's trip that make it more expensive?
Notes: n = 2,005; n (international travelers on the longest trip) = 385; n (domestic travelers) = 1,620.

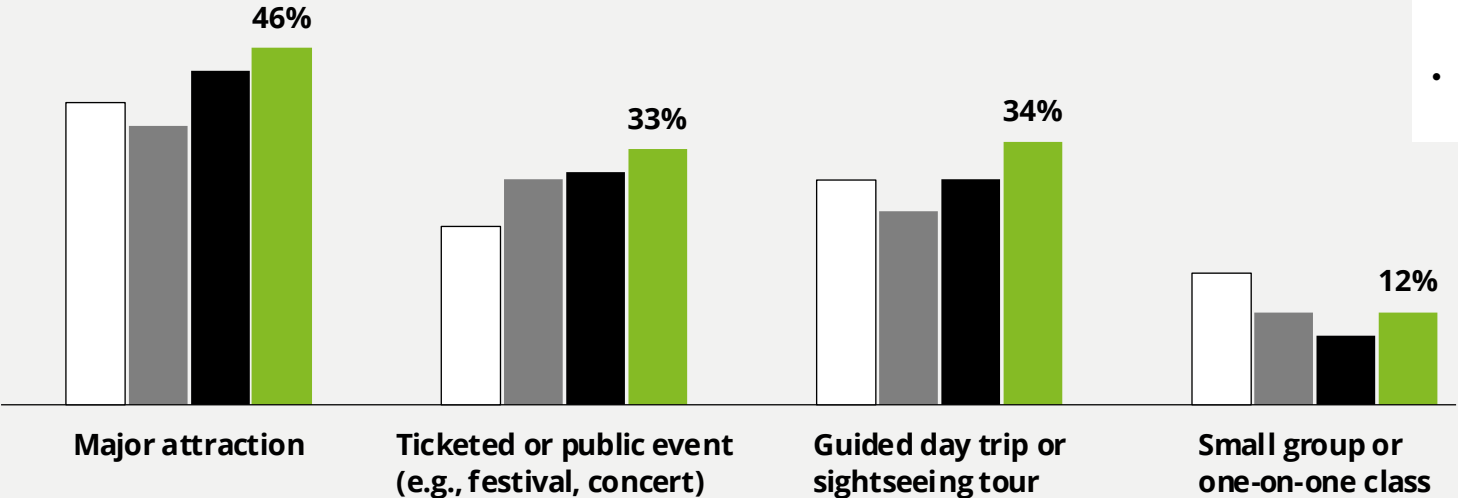
Travelers report relative satisfaction with the value for money of base and premium economy fares. In-trip dining options have the lowest perceived value.



In-destination activities are seeing higher participation for the second year in a row. Even VFR* travelers, typically less active in-destination, plan to partake at a much higher rate.

Participation in travel activities, lodging travelers

○ 2021 ● 2022 ● 2023 ● 2024



Live events are attracting travel all year round:

- 24% say they have traveled to attend a concert or music festival in 2024.
- 22% have traveled to attend a sports event.

Participation in travel activities, VFR* travelers	32% 23% in 2023	24% 15% in 2023	16% 17% in 2023	9% 6% in 2023
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Questions: (1) Which of the following experiences are you likely to participate in while traveling? Please select all that apply. (2) In 2024, have you traveled or do you plan to travel for any of the following reasons?
 Notes: 2021 n = 1,501; 2022 n = 1,540; 2023 n = 2,531; 2024 n = 2,005. *VFR = Visiting friends and relatives (versus staying in paid lodging). (2) n = 4,074.

Travel research and booking

Social media has long been influential in travel, but with passion for adventure growing, it seems that interest in travel content is rising too. Use of social apps and video content for trip planning is up significantly, across all generations aside from boomers. When it comes time to book, fewer travelers say they intend to purchase flights via online travel agencies (OTAs), suggesting that deal-hunting might be a lower priority this year.



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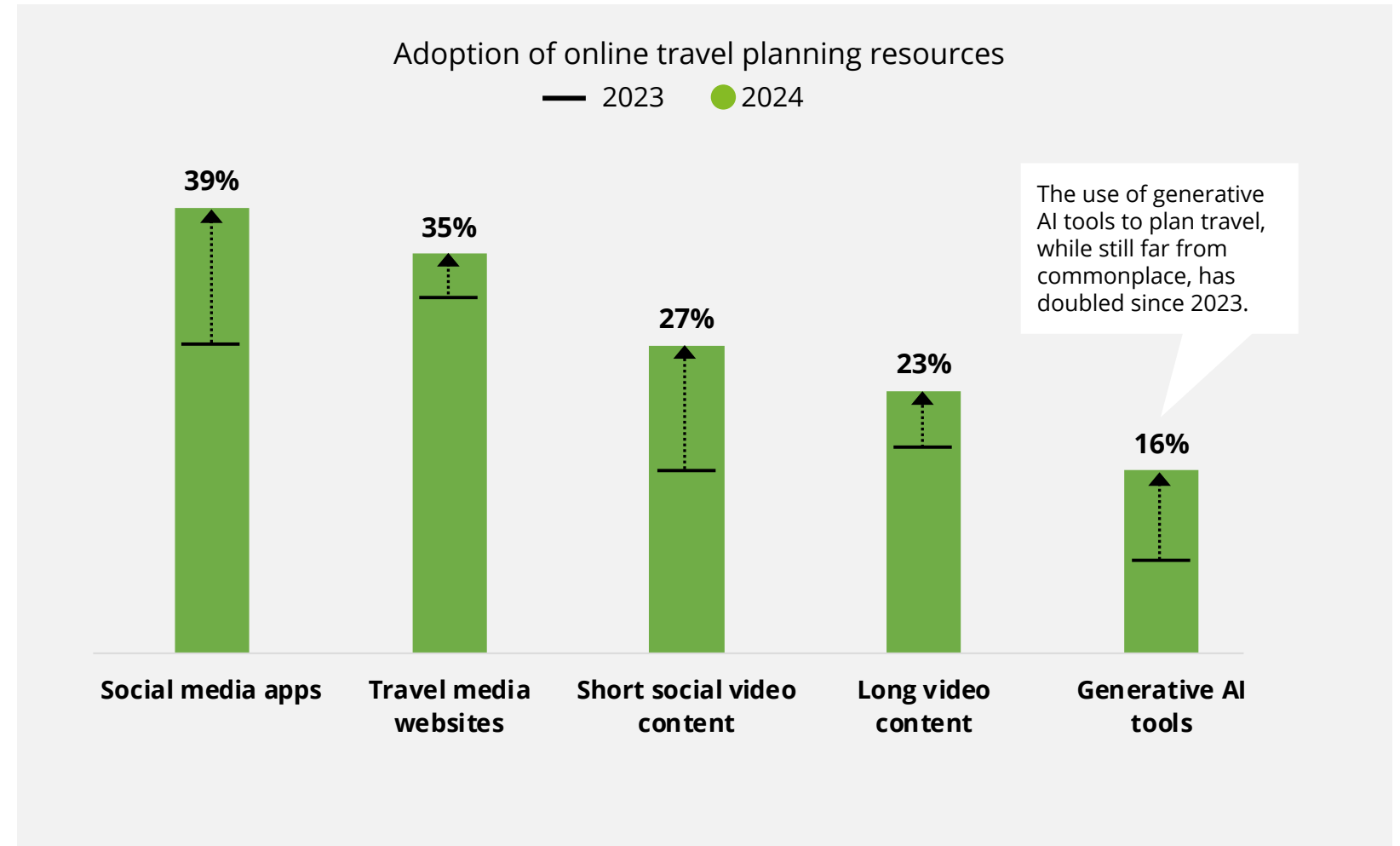
More trips, more research: Use of online planning tools is up, regardless of type.

The growth of Gen Z travelers (14% of holiday travelers versus 8% in 2023) is likely contributing to increased use of social apps in trip planning.

For gen AI tools, which continue to grow in adoption, destination inspiration is the most popular use case.

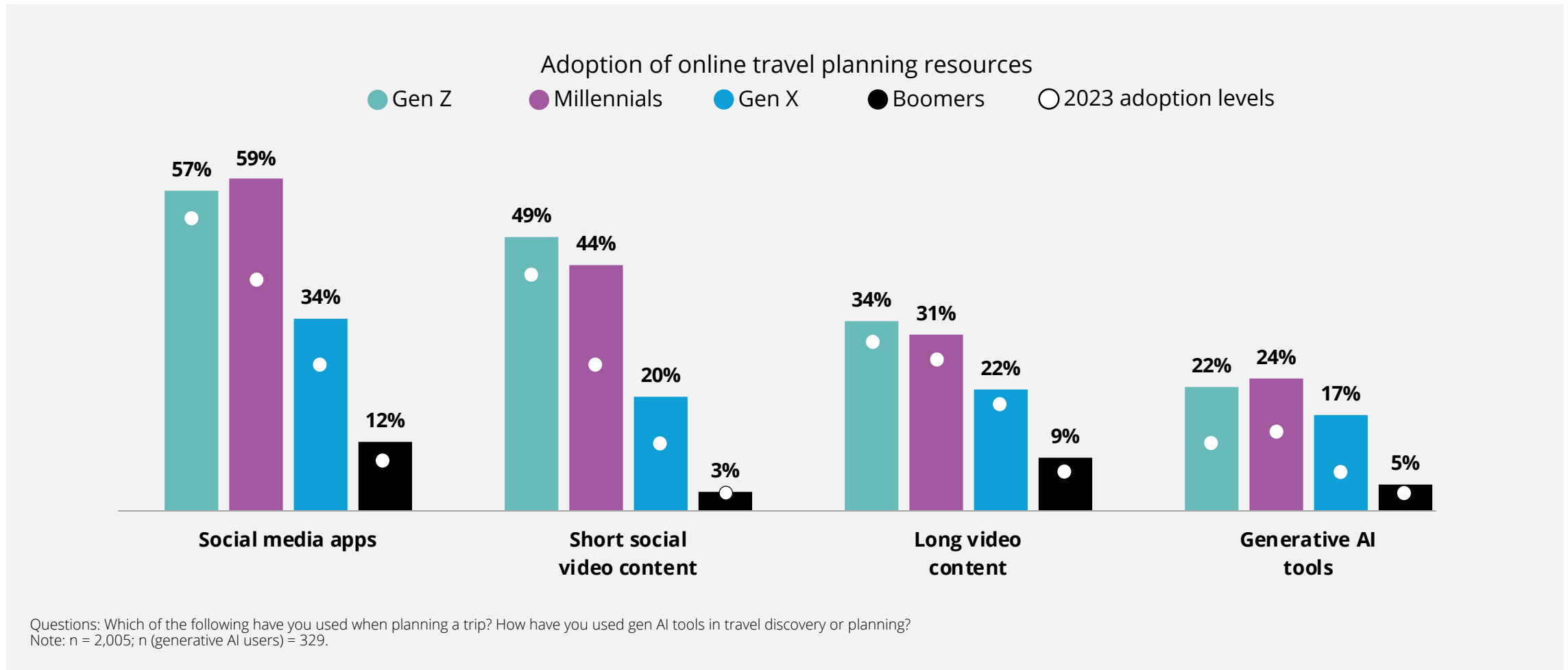
Question: Which of the following have you used when planning a trip?
Note: n = 2,005.

Significant jumps in social media, including short social video, in trip planning, suggest travel content is growing in popularity.



Millennials' use of social media in trip planning grows more than any other age group, and Gen X shows significant growth too. Gen Z is more video-oriented than older generations. And boomers remain limited in their use of online sources.

Millennials still use gen AI more than other age groups, but Gen X and Gen Z are catching up.

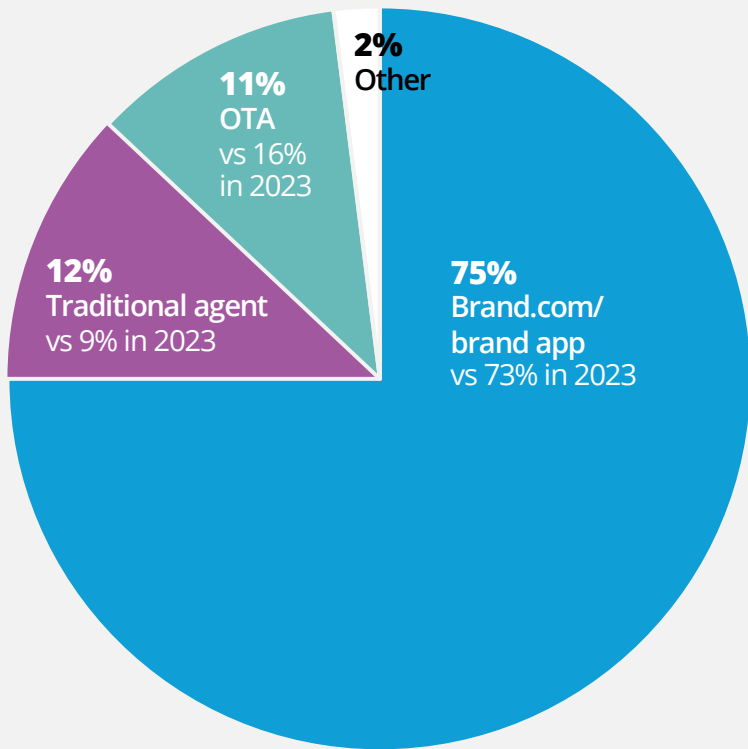


OTA share of flight bookings dips, as traditional agents and airlines gain

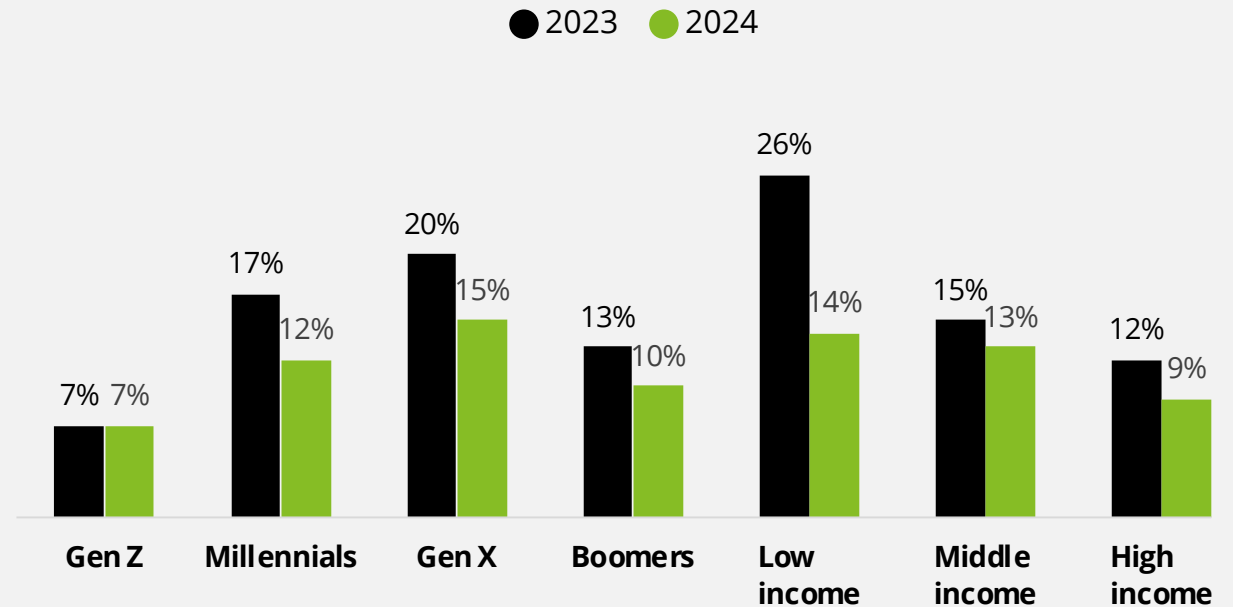
A decrease in travelers planning to book air via online travel agencies (OTAs) is a likely signal of less deal-hunting than in 2023. More travelers intend to book direct, and interest in traditional agents is also growing.

Low-income travelers account for a huge amount of the share shift, as their OTA intent declines to look more like higher-earning travelers.

Air booking channel, longest trip



Percentage of air travelers planning to book longest-trip flight via OTA, by age and income



Question: Which channel did you or do you plan to use to book your flight for this trip?
Note: n = 1,094 travelers planning to take a flight on their longest trip.

Laptop lugging (working on trips)

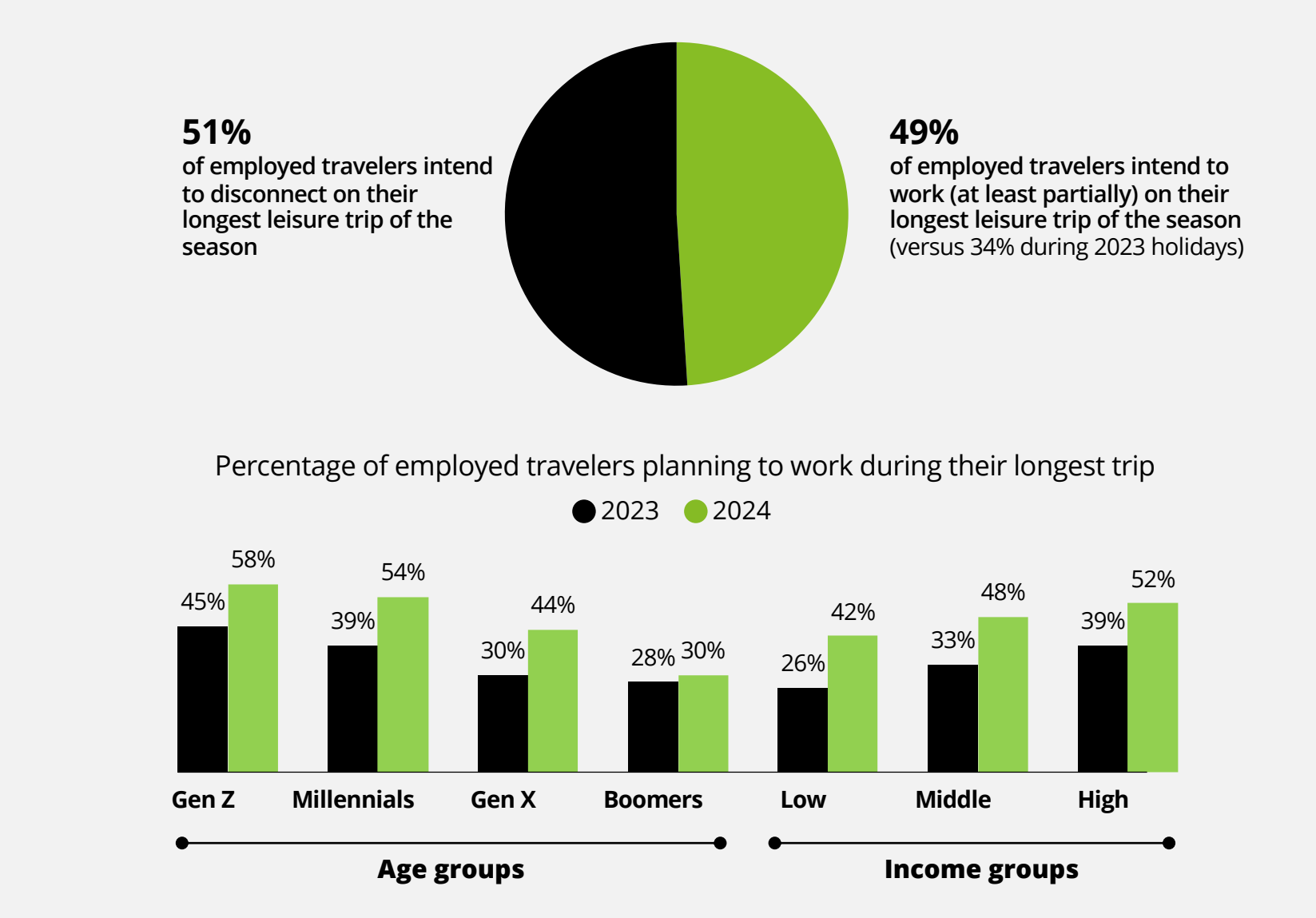
Nearly five years after the COVID-19 pandemic compelled millions to start working from home, remote work still has a major impact on travel. In fact, if the coming holiday season is any indicator of longer-term behavior, more Americans are laptop lugging—bringing work along with them on their longest trip of the season. Laptop luggers add days to trips and trips to the season, boosting demand across travel categories.



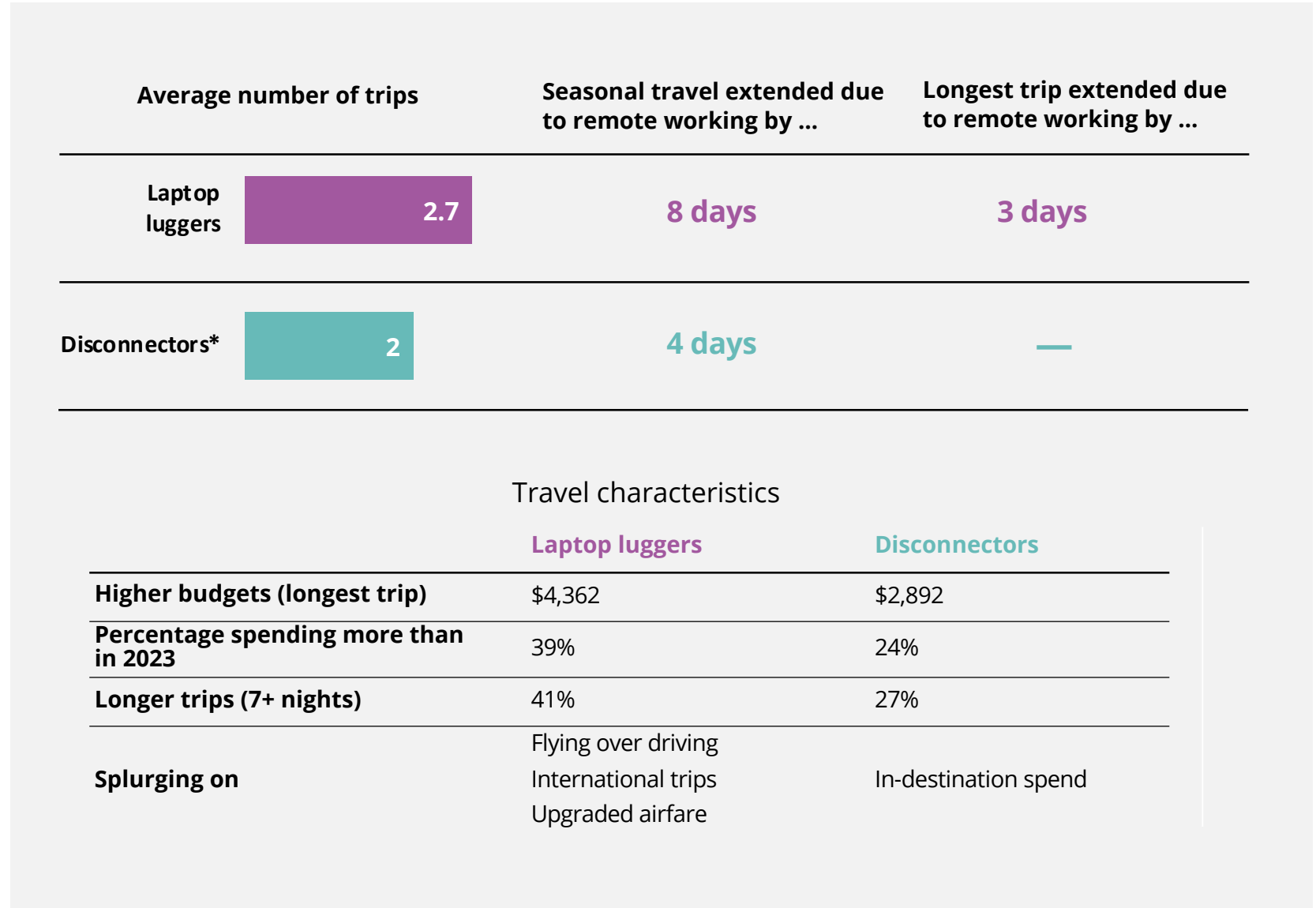
Nearly half of employed travelers say they are likely to work on their longest trip of the holiday season

Laptop lugging makes a significant jump for the first time since 2021, going up across age and income groups.

Question: Do you plan to work during this trip?
 Note: n = 1,401 travelers who are employed full-time, part-time, or on a contract basis.



Laptop luggers are taking more trips throughout the season and extending them thanks to remote work



Questions: (1) How many leisure trips will you be taking this holiday season? (2) How many days are you adding to the season and this trip because of the ability to work remotely? (3) How long will your longest trip this holiday season be? (4) How much is the estimated budget for your longest holiday trip? (5) What adjustments are you making versus last year's trip that make it more expensive?

Notes: n = 1,401 (employed travelers); n (laptop luggers) = 686; n (disconnectors) = 715.

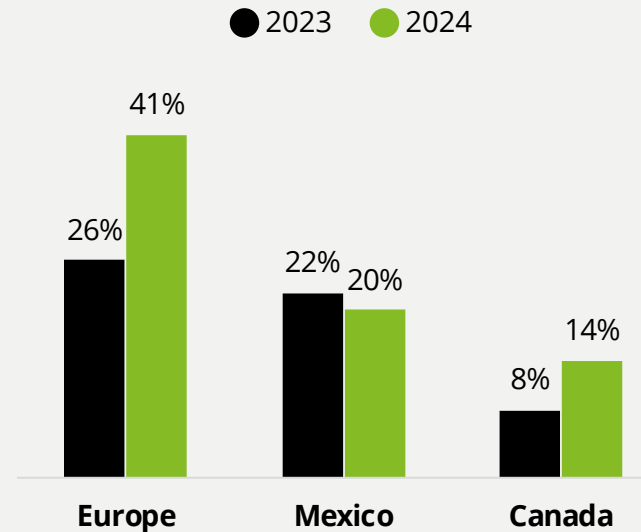
*Disconnectors: employed travelers who do not plan to work during their longest trip of the holiday season.

Showing signs of passion for travel, laptop luggers take more international trips, and are more active consumers of online travel content

A lot more laptop luggers are headed overseas on their longest trip of the season. 30% of laptop luggers are traveling internationally compared to 18% of disconnectors. More of them are visiting Europe and Canada this year.

This intent is significantly higher than 2023, when 14% of laptop luggers traveled to an international destination for their longest trip.

International destinations: Laptop luggers



Regarding **preferences for complimentary services**, laptop luggers show greater interest toward premium in-flight entertainment. For lodging, they would prefer complimentary airport transfers, pre-arrival concierge sessions, and coffee services.

If you could pick ONE complimentary service during travel, which would it be?

	Laptop luggers	Disconnectors
Air travel		
Premium in-flight entertainment	28%	18%
Lodging		
Airport transfers	26%	22%
Coffee service/refills	18%	12%
Pre-arrival concierge	12%	7%

Laptop luggers are using online tools to plan their trips more than disconnectors but also more than they did in 2023. Twice as many laptop luggers are using generative AI tools for travel planning this year.

Online travel planning tool usage

Online tools	Laptop luggers	2023 usage	Disconnectors
Social media apps	57%	43%	41%
Short social video content	46%	29%	25%
Long video content	35%	32%	21%
Generative AI tools	32%	15%	13%

Questions: Which of the following best describes your flight? Which international region will you be flying to? Thinking about the flight/hotel for your longest leisure trip this holiday season, if you could have ONE of the following for no extra cost, which would you choose? Which of the following have you used when planning a trip?

Notes: n = 1,401 (employed travelers); n (laptop luggers) = 686; n (disconnectors) = 715.



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