

YouGov

# Travel in 2024

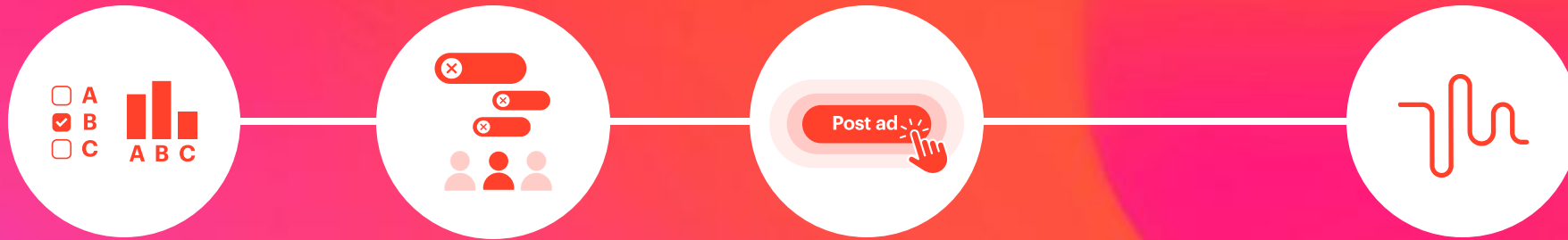
## Navigating travel preferences, experiences and AI

Presented by Eva Stewart, Global Sector Head for T&T  
Guest: Esra Calvert, CEO of Esra Calvert Consulting

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# No.1 Market research company pollster\*



YouGov was recently recognized for our **track record and transparent methodology** in 538's 2024 US Pollster Ratings.



**624 YouGov polls were analyzed** – the highest count among top-rated firms – demonstrating our **unmatched consistency and extensive commitment to quality.**



Our commitment to certainty, transparency, and integrity sees us ranked as the **4th overall pollster**, and **1st Market Research company** in the American market.

**\*538 2024 Pollster Ratings:**

538 is a leader in data journalism, renowned for its rigorous and comprehensive analysis of polling firms. It is widely recognized for utilizing statistical analysis to tell accurate, compelling stories about elections and politics. [Ratings methodology](#)

## Navigating Traveler Expectations

1. How have **traveler expectations** evolved 2 years post-pandemic?
2. What's the **role of technology** in meeting the rising expectations of travelers?
3. What **strategies** can the travel industry implement to adapt to these evolving expectations and technological advancements?

YouGov Research Methodology

Representative online survey UK & US, N=2,219 travelers; Fieldwork 5th - 10th April 2024

YouGov AI Qual Explorer: open-ended question to a quantitative survey. AI thematic analysis. UK N=500, Fieldwork April 24<sup>th</sup>; US N=1,137, Fieldwork June 11<sup>th</sup>

# What inspires people to travel in 2024?

Travel continues to serve as a means of physical and mental rejuvenation but we're also seeing more emphasis on personal development.

Top 3 motivators to travel:

- Seeking relaxation and escape from routine (65%)
- Adventure and exploration (43%)
- Cultural exploration and educational experiences (41%)



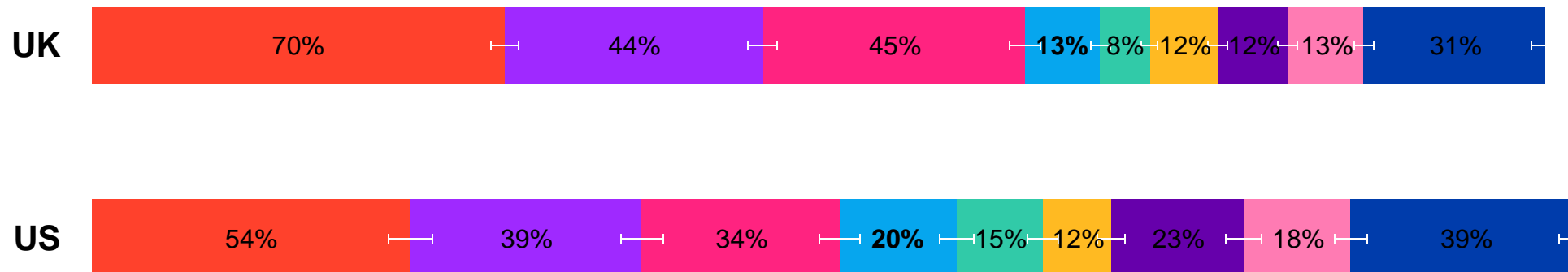
Q: Which THREE, if any, of the following factors motivate you the most to travel? (Please select up to three answer options.)

*Travel is becoming less about 'where' and more about 'why'*

## For Brits, the emphasis on relaxation and cultural exploration, conversely, Americans show a stronger inclination towards traveling to see friends/family, personal growth, pursuing hobbies and events

- Seeking relaxation and escape from routine
- Cultural exploration and educational experiences
- Building connections and meeting new people
- Attending special events or festivals
- Meeting friends or family
- Adventure and exploration
- Personal growth
- Escaping technology and digital detox
- Pursuing a hobby or interest (e.g., photography, diving)

Key travel motivators, % of respondents

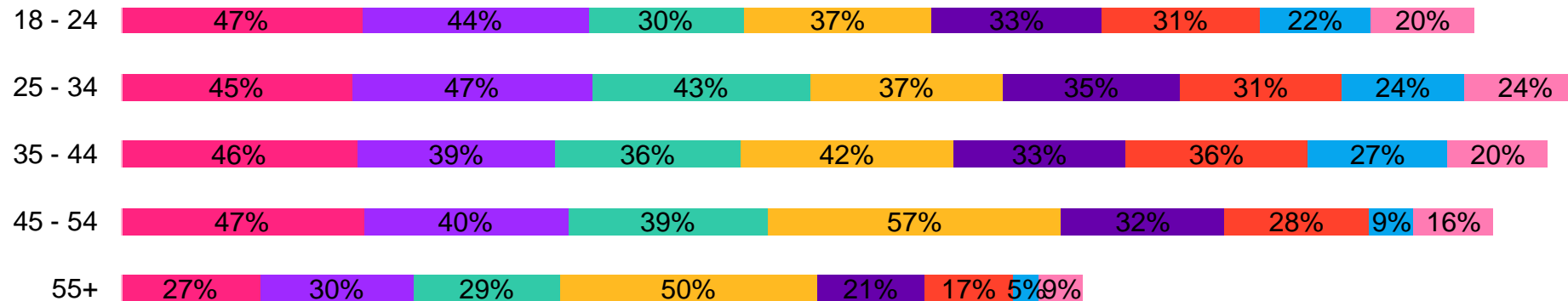


Q: Which THREE, if any, of the following factors motivate you the most to travel? (Please select up to three answer options)

## Younger US travelers (25-34 years) heavily favor adventure and gastronomy, whilst shifting towards eco-tourism as they approach mid-life (35-44 years)

- Relaxation and wellness (e.g., spa retreats, meditation retreats, wellness cruises, etc.)
- Adventure and outdoor activities (e.g., hiking, wildlife safaris, extreme sports, etc.)
- Food and gastronomy (e.g., wine tours, street food tours, etc.)
- Historical and educational (e.g., archaeological sites, museums, etc.)
- Luxury and pampering experiences (e.g., luxury cruises, exclusive resorts, etc.)
- Cultural immersion (e.g., local cooking classes, traditional ceremonies, etc.)
- Eco-tourism and sustainable travel (e.g., conservation projects, eco-resorts, etc.)
- Volunteer and philanthropic travel (e.g., community service, habitat restoration, etc.)

Travel experiences most interested in, % of respondents



Diverse travel motivations point toward a need for personalized experiences

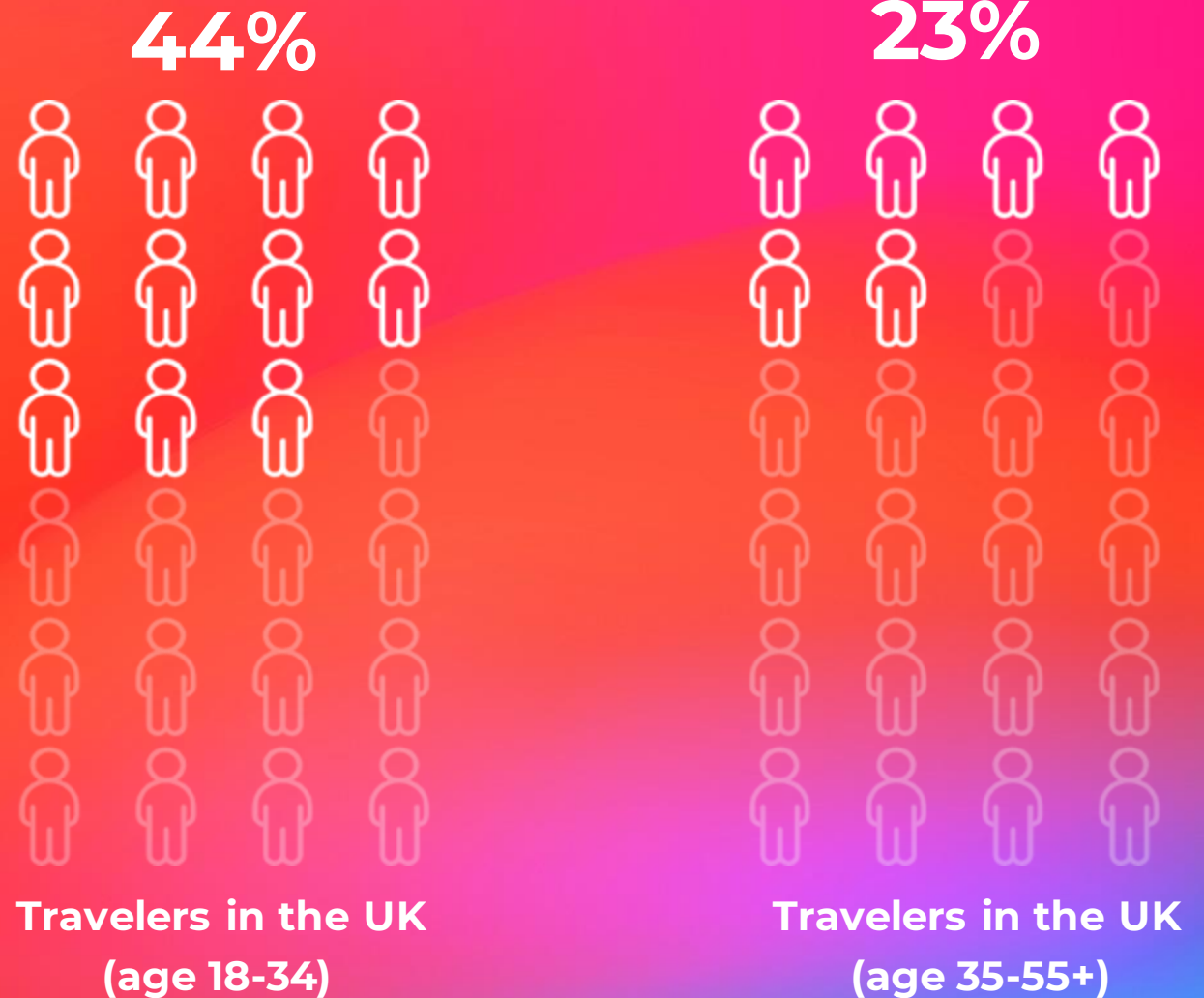
Q: Which THREE, if any, of the following factors motivate you the most to travel? (Please select up to three answer options)

## In contrast, there's a greater shift toward sustainable and impactful travel among young UK travelers

*Younger generations are not only looking to travel but are also conscious of their impact on the destinations they visit -> great target segment for those seeking to attract eco-conscious travelers.*

Q: Which, if any, of the following types of local travel experiences are you most interested in? (Please select all that apply.)

Number of respondents choosing sustainable travel experiences, % of respondents

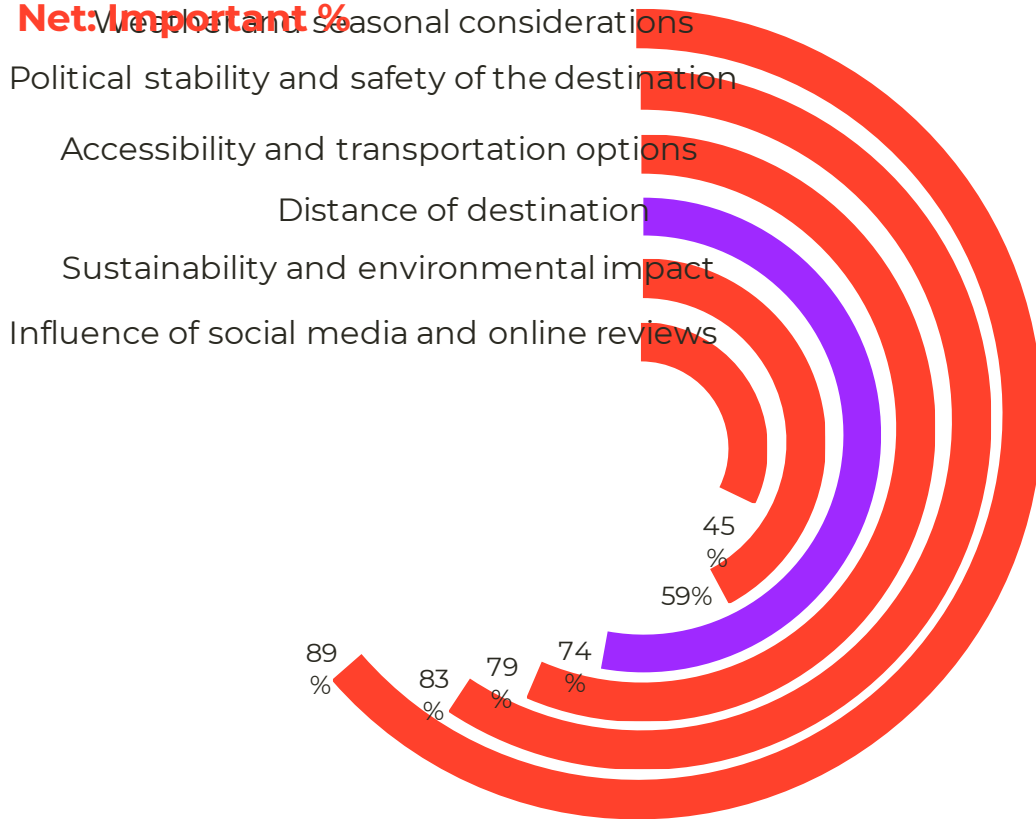




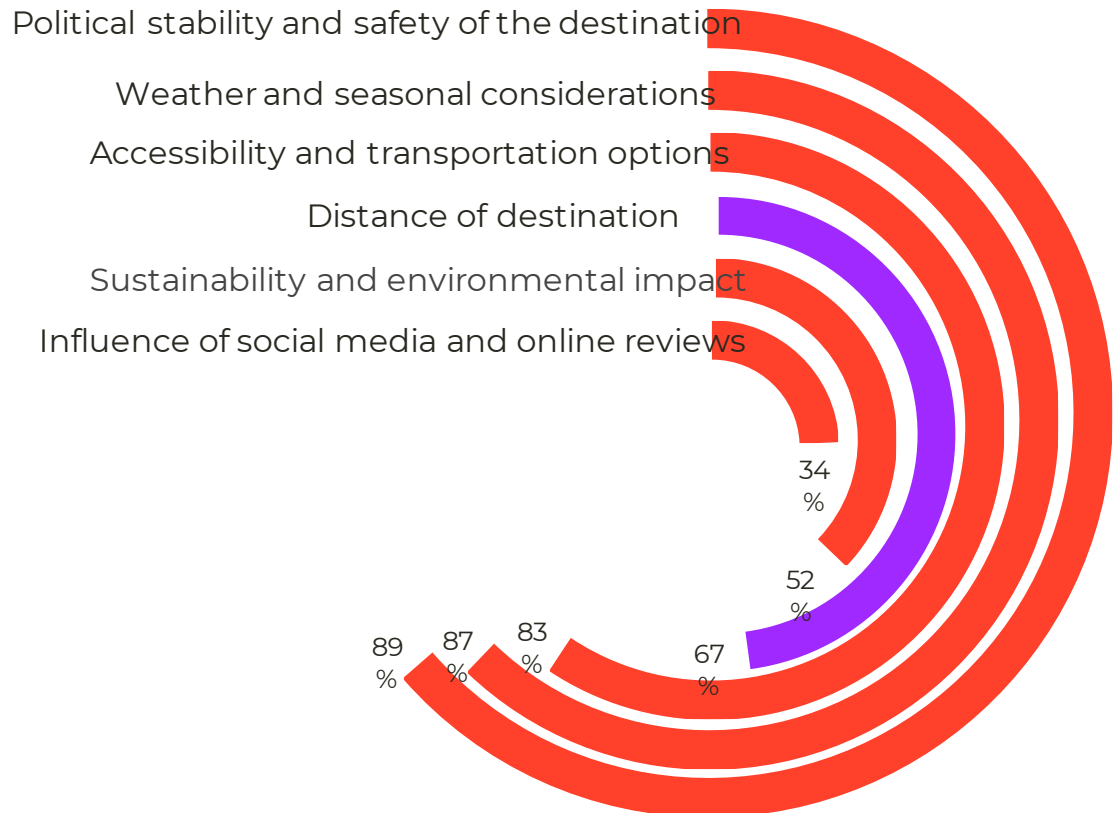
# Greater British willingness to travel farther reflects a quest for unique experiences, whilst social media and online reviews have a stronger influence on Americans choosing where to travel

## Importance of factors in influencing choice of destination,

### Net: Important %



United States



United Kingdom

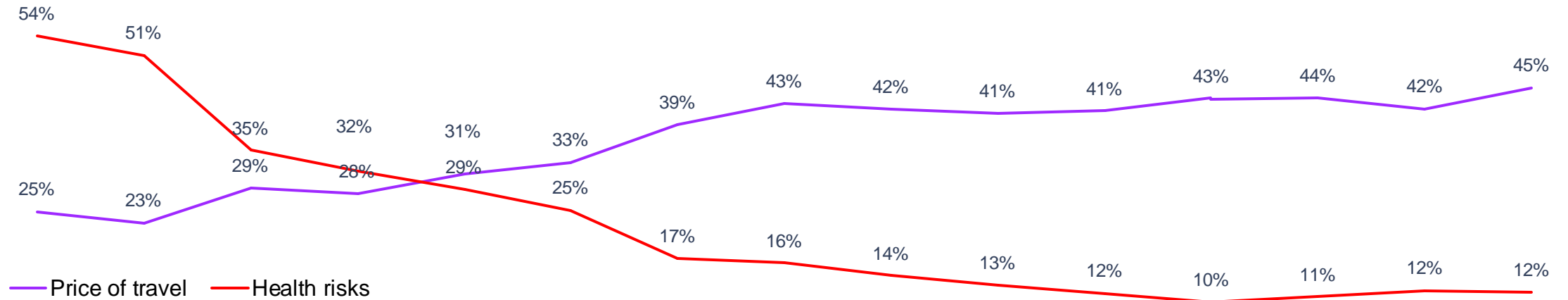
Q: How important are each of the following factors in influencing your choice of travel destination? (Please select one option on each row)

# Cost continues to guide travel choices though, as concerns around price of travel continue to rise. The question remains: how can the worth of every penny be maximized in the pursuit of unforgettable journeys?

**87%** 😄 😄 😄 😄 😄 😄 😄 😄 😄 😄

Net Importance of Cost and availability of budget options on influencing choice of destination

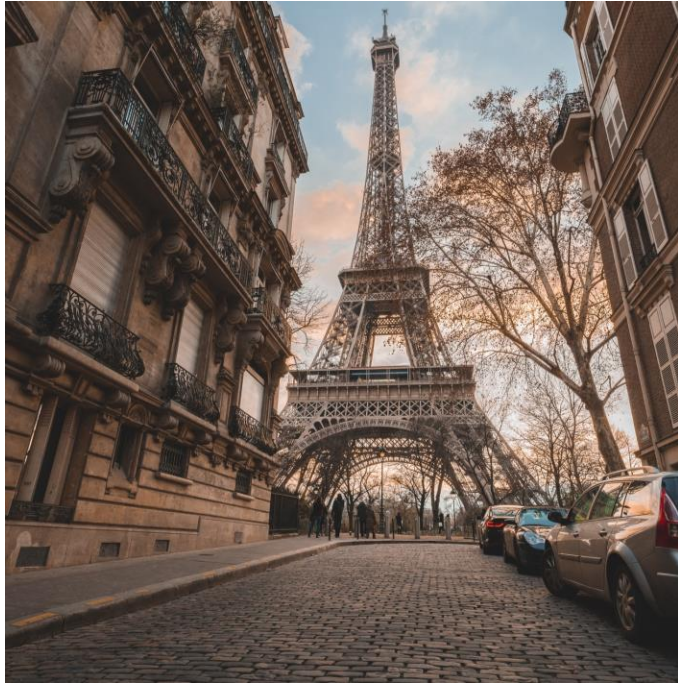
## Trendline of Travel obstacles



2020-10-01 2021-01-01 2021-04-01 2021-07-01 2021-10-01 2022-01-01 2022-04-01 2022-07-01 2022-10-01 2023-01-01 2023-04-01 2023-07-01 2023-10-01 2024-01-01 2024-04-01

1. Q: How important are each of the following factors in influencing your choice of travel destination? (Please select one option on each row); Net Agreement level, N=2219, UK and US  
 2. Travel Obstacles from Global Travel Profiles, US & UK, N=203,866, 1<sup>st</sup> Oct 2020 – 1<sup>st</sup> April 2024

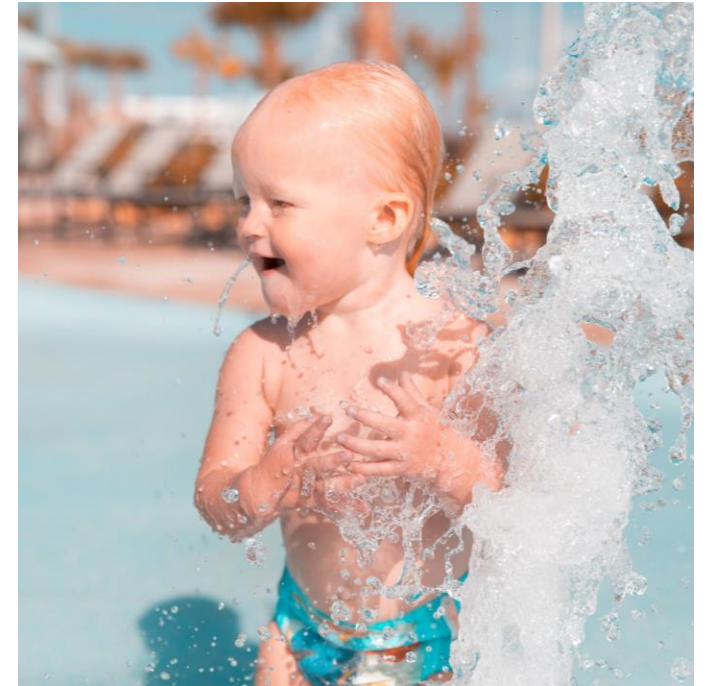
## Experiences are also at the heart when selecting accommodation



Proximity to local attractions and transportation (64%)



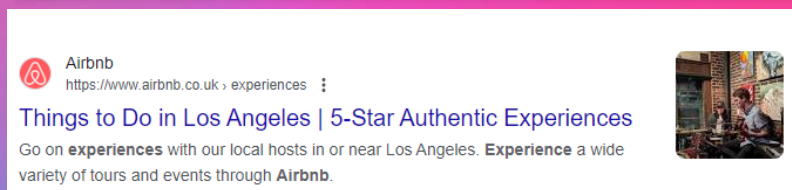
Unique dining experiences (e.g., local cuisine, themed restaurants, celebrity chefs, etc.) (29%)



Family-friendly amenities (e.g., kids' clubs, family suites, babysitting services, etc.) (21%)

Q: When choosing accommodations whilst on vacation (i.e. hotels, resorts, cruise ships, etc.)...Which, if any, of the following amenities and services are most important to you? (Please select all that apply)

Whilst Airbnb have been in the Experiences business for a while, Hotels are intensifying competition with Cultural managers to cater to traveler segment focused on cultural exploration



1. **Rooms with unique views** (e.g., city skyline, beachfront, mountain vistas, etc.) **(53%)**
2. **Outdoor facilities** (e.g., private balconies, rooftop terraces, gardens, etc.) **(49%)**
3. **In-room amenities** (e.g., premium toiletries, high-speed internet, kitchenette, etc.) **(45%)**
4. **Locations offering privacy and seclusion** (e.g., private villas, adults-only sections, etc.) **(34%)**
5. **Facilities offering cultural experiences** (e.g., art galleries, live performances, workshops, etc.) **(19%)**
6. **Green and sustainable building practices** (e.g., energy-efficient lighting, water conservation, etc.) **(17%)**
7. **Themed or uniquely designed rooms** (e.g., cultural themes, modern design, etc.) **(13%)**

Q: What are your preferences regarding room types and facilities when booking accommodations? (Please select all that apply)



**Role of Technology:  
Only 1 in 10 Brits and Americans  
seek to escape technology on  
their trips, but 42% are eagerly  
integrating or would integrate AI  
into their travel planning**

# Role of technology: desire for personalization and tech amenities indicates a growing shift towards smart, connected stays

## Technology integration

One in Five Americans desire Technology integration (e.g., smart rooms, mobile check-in, virtual concierge, etc.), compared to 1 in 10 Brits, especially among younger generations of 18-34

## Personalization and exclusivity

Compared to Brits, Americans also overindex on wanting Exclusive access or private experiences (e.g., private beaches, members-only clubs, etc.) (19% vs 12%) and Personalized services (e.g., customized tours, personal concierge, butler services, etc.) (19% vs 12%)

*'Accommodation to be as connected as they are'*

Q: When choosing accommodations whilst on holiday (i.e. hotels, resorts, cruise ships, etc.)...Which, if any, of the following amenities and services are most important to you? (Please select all that apply)

# Can AI further enhance Travel experiences?



## Automated trip planning

AI can generate personalized trip itineraries and recommendations based on user preferences and constraints



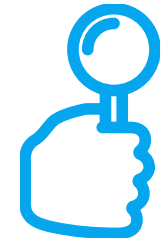
## Predictive pricing

AI can analyze historical pricing data to predict the best time to book flights and hotels



## Intelligent chatbots

AI-powered chatbots can provide 24/7 customer service for booking assistance and trip planning advice

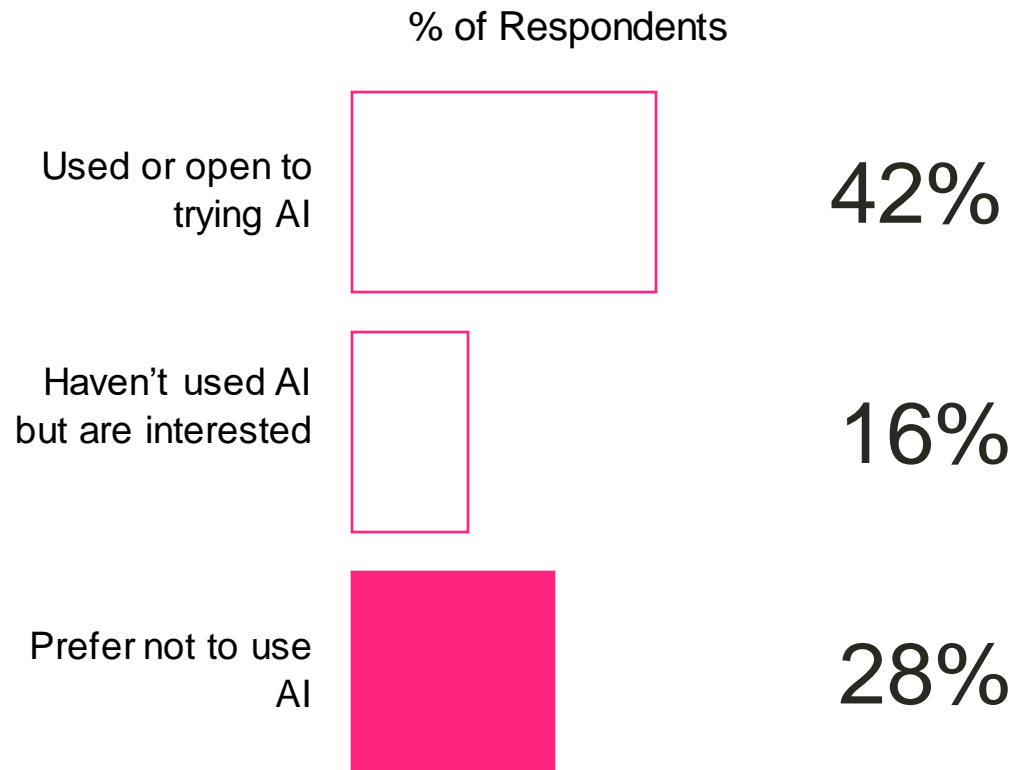


## Enhanced search

AI improves search algorithms to deliver more relevant results and recommendations

**AI is transforming many aspects of travel to provide more personalized, predictive, and streamlined experiences for travelers.**

## AI Adoption: Openness and Resistance. Varied pace of adoption amongst travelers



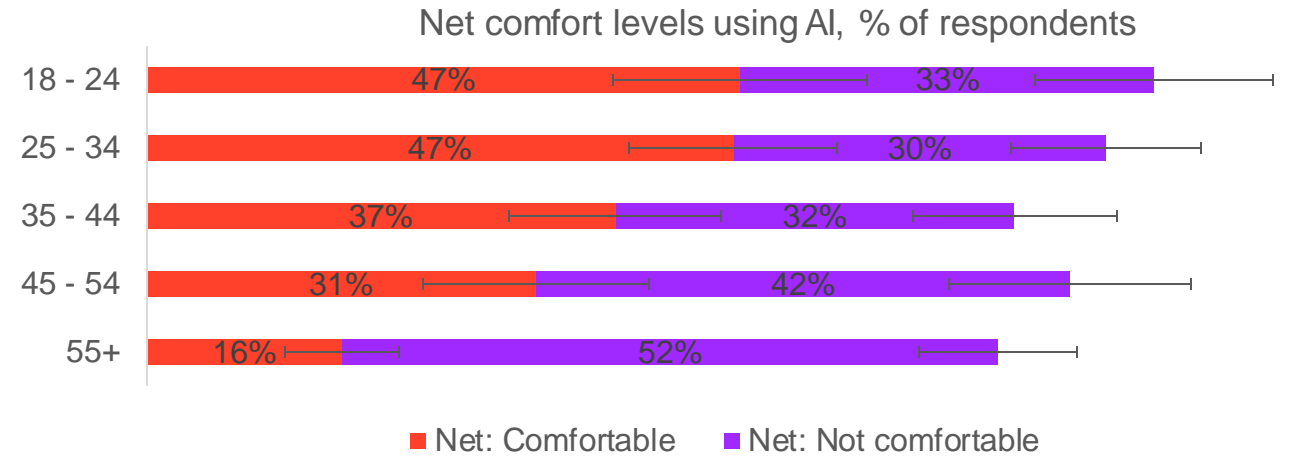
The spotlight will likely fall on how the travel industry can turn this openness into enthusiasm and ease the fears tied to digital assistance.

Q: In which, if any, of the following ways have you used or would consider using AI to enhance your travel experiences?  
(Please select all that apply)

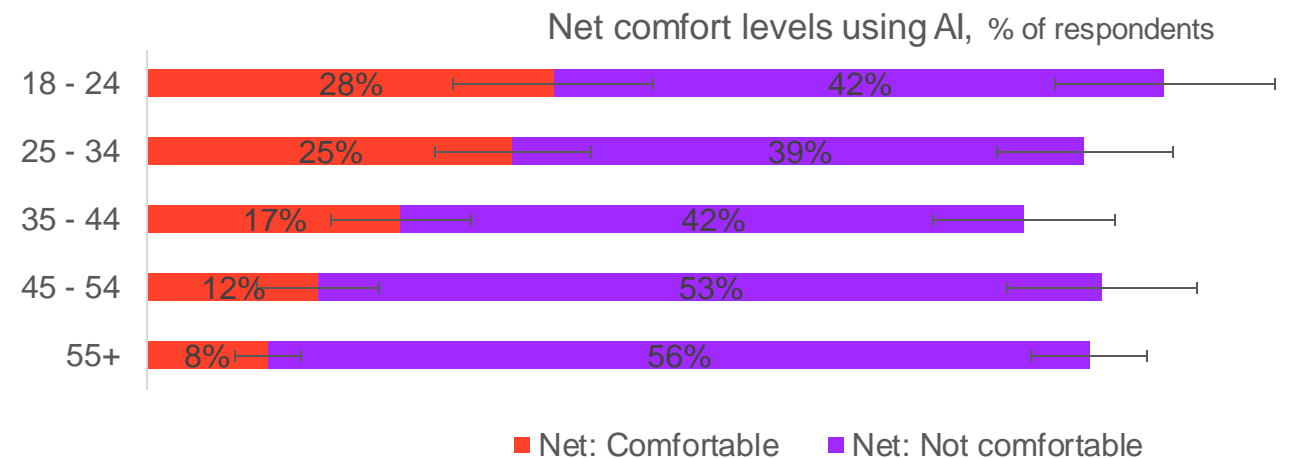


# Americans, especially younger, are more comfortable using AI for trip/travel planning

## US



## UK



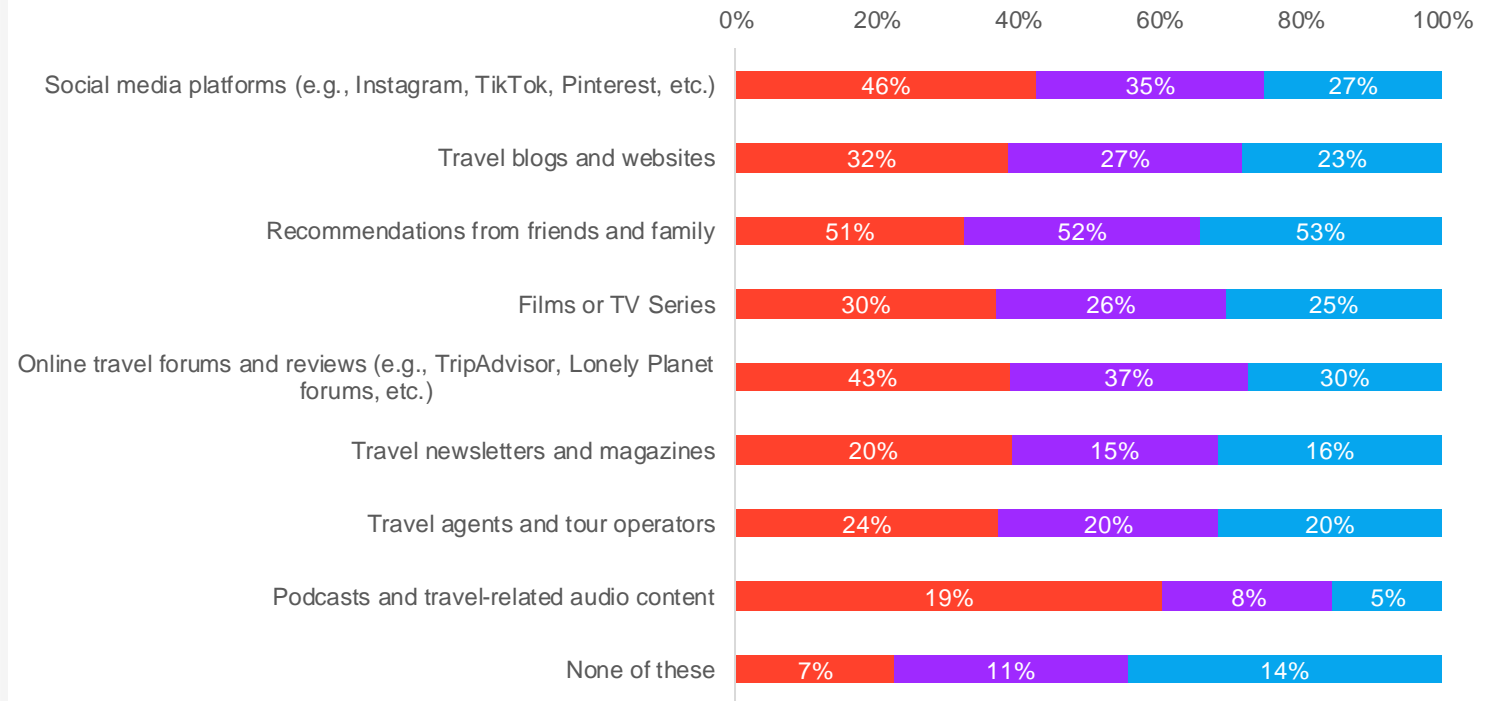
Q: How comfortable do you feel about using AI-driven platforms for trip planning and organizing travel experiences? (Please select the option that best applies)

**Travelers open to using or who have used AI still rely heavily on the opinions of others: 51% looking to friends and family for advice, and 43% trusting online forums and reviews.**

Human touch remains a key compass in the journey of destination discovery

Q: Through which, if any, of the following channels do you usually discover new travel destinations? (Please select all that apply)

### Channels for discovering new travel destinations among groups of different attitudes to AI, % of respondents



■ Very comfortable - I rely on AI for personalised recommendations and efficiency, Somewhat comfortable - I use AI for certain aspects but prefer human input for others

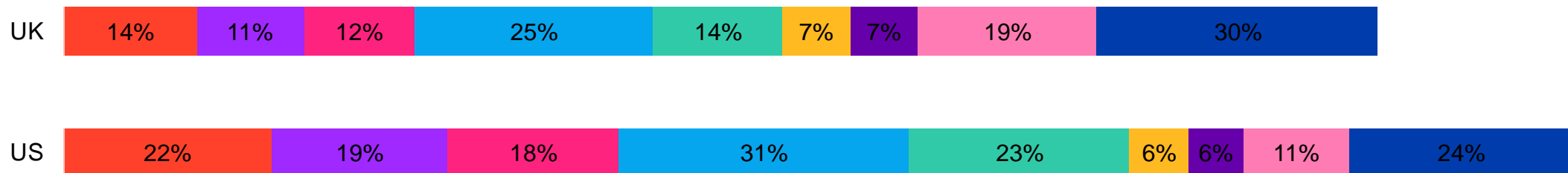
■ Neutral - I have no strong preference between AI and traditional planning methods

■ Very uncomfortable - I prefer traditional planning methods without AI involvement, Somewhat uncomfortable - I'm cautious about privacy and the impersonal nature of AI

# Enhancing Travel with AI: language assistance and personalized recommendations as preferred services

- For personalised travel recommendations (e.g., destinations, activities, accommodations, etc.)
- For real-time travel assistance and chatbot services
- To create customised itineraries
- For language translation and local communication assistance
- To analyse reviews and ratings for better decision-making
- None of these
- Don't know
- Not applicable - I haven't used AI for travel planning but am open to trying it
- Not applicable - I prefer not to use AI in my travel planning process

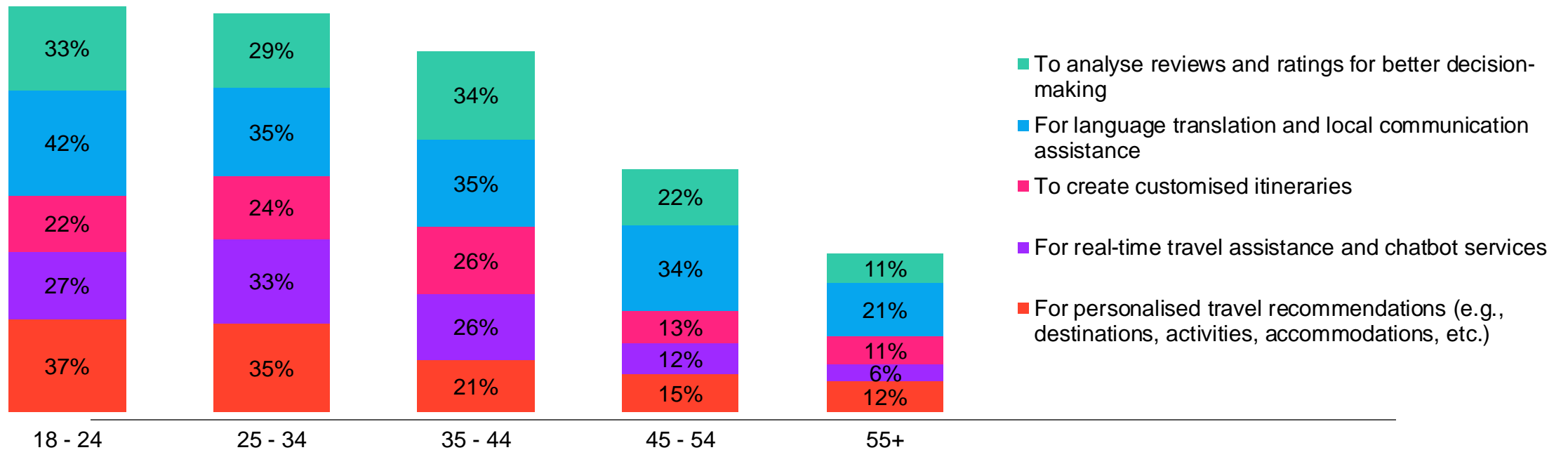
% of respondents



## Younger generations are leading the charge as early adopters of AI in travel, signaling a future where tech-savvy preferences will increasingly drive industry innovation and service offerings



AI use cases by age group, % of respondents

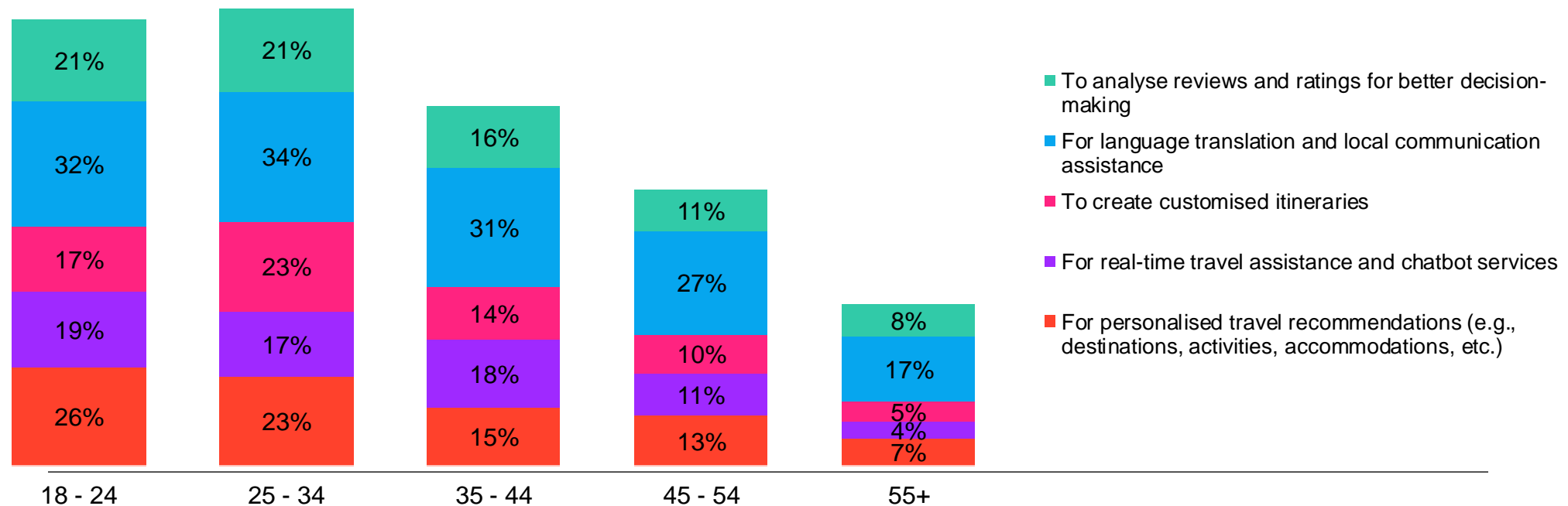


Q: In which, if any, of the following ways have you used or would consider using AI to enhance your travel experiences? (Please select all that apply. If you haven't used AI for travel planning but are open to trying it or prefer not to use AI in your travel planning process, please select the relevant 'Not applicable' option), Country: US

The UK's younger demographic shows a budding interest in AI's potential, yet overall adoption lags the US – suggesting a more gradual curve towards widespread acceptance and integration



AI use cases by age group, % of respondents



Q: In which, if any, of the following ways have you used or would consider using AI to enhance your travel experiences? (Please select all that apply. If you haven't used AI for travel planning but are open to trying it or prefer not to use AI in your travel planning process, please select the relevant 'Not applicable' option), Country: US

## Reasons Americans give for their likelihood to use (or not) AI in future vary...

### Likely to use AI in the future

- Convenience and efficiency in planning trips
- Instant customer support
- Real-time advice, and personalized recommendations
- Leverage vast amounts of data to provide expert recommendations for travel-related services
- Flexibility in navigating and adapting to changing travel conditions
- Help minimize errors in travel planning
- Help optimize travel budgets by analyzing pricing data and user preferences

### Unlikely to use AI in the future

- A lack of trust in AI
- A preference for human interaction
- A lack of understanding about how AI works
- Enjoyment of planning trips themselves
- Concerns about the reliability and accuracy of AI
- A preference for local knowledge
- Skepticism of AI technology

# Key observations

## 1. Importance of Experiential Travel

Post-Pandemic: Increased desire for unique, personalized, and adventurous travel experiences, which heavily influence traveler choices in destinations and accommodations, driving the demand for local cultural engagement and unique amenities.

## 2. Cost is Still King

While Brits are willing to travel farther than ever and Americans are turning to social media for inspiration, for travelers everywhere, the cost continues to be the deciding factor in choosing both destination and experience.

## 3. Generational Tech Adoption

Younger travelers, especially in the US, are leading the adoption of AI in travel, signaling a trend toward more tech-integrated travel services in the future.

## 4. Personalization Through AI

AI significantly enhances travel planning by offering personalized experiences, tailored itineraries, and recommendations, which are highly valued by modern travelers seeking unique and customized journeys.

## 5. Cultural Differences in AI Utilization

There's a notable difference between American and British travelers in terms of how comfortable they are with using AI for travel planning, with Americans showing greater enthusiasm for technology integration.

## 6. Balancing Technology and Personal Touch

While AI offers efficiency and customization, there remains a strong preference for personal interaction and concerns over privacy, indicating the need for the travel industry to balance high-tech solutions with human-centered service.

# Strategies for the Travel Industry

Immediate steps that Travel organizations can do to inform their activities in 2024

## Embrace Experiential Personalization

**Conduct in-depth consumer surveys to identify experiential trends and design travel experiences that resonate with modern travelers.**

**Position travel offerings as immersive and culturally-rich experiences that go beyond the usual.**

## Optimize Cost-Effective Travel Solutions

**Utilize consumer survey insights to understand how to balance cost-efficiency with value-rich travel experiences.**

## Integrate AI-driven Solutions with Personal Touch

**Learn more about cultural and other differences in AI acceptance and tailor your approach accordingly to cater to both tech-savvy and traditional travelers.**





# Travel in 2024: webinar & Q&A



Eva Stewart, Global Sector Head for  
Travel & Tourism

**YouGov**



Esra Calvert, Founder

**Esra Calvert Destination Consultancy, TTRA  
International Board Chair**

# Getting Rid of No Joy in Travel Planning & Experiences



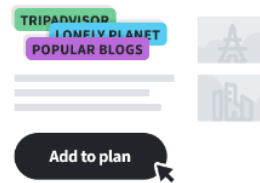
# Expedia's Romie Group Chat

In Alpha Testing



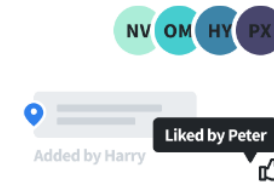
# Wanderlog's Functional Features

## Features to replace all your other tools



### Add places from guides with 1 click

We crawled the web so you don't have to. Easily save mentioned places.



### Collaborate with friends in real time

Plan along with your friends with live syncing and collaborative editing.



### Import flight and hotel reservations

Connect or forward your emails to get them magically added into your trip plan.



### Expense tracking and splitting

Keep track of your budget and split the cost between your tripmates.



### Checklists for anything

Stay organized with a packing list, to-do list, shopping list, any kind of list.



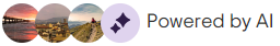
### Get personalized suggestions

Find the best places to visit with smart recommendations based on your itinerary.

# Tripadvisor's Practical Reviews Summary

## Reviews summary

This summary was created by AI, based on recent reviews.



Nestled close to Vail Village, Sonnenalp Vail garners accolades for its prime location, offering easy access to skiing and dining. The hotel's atmosphere receives high marks for its cozy yet elegant ambiance, complete with live music. Luxurious, well-appointed rooms provide ample space and unique amenities, contributing to the hotel's charm.

Guests have called out the exceptional amenities, particularly the spa and breakfast buffet, alongside the personalized and warm service. The meticulous cleanliness is another highlight, though some guests note the pricing is on the higher side.

[Jump to all reviews](#) ↓



Location  
[Convenient](#)



Atmosphere  
[Inviting](#)



Rooms  
[Comfortable](#)



Value  
[Expensive](#)



Cleanliness  
[Spotless](#)



Service  
[Attentive](#)



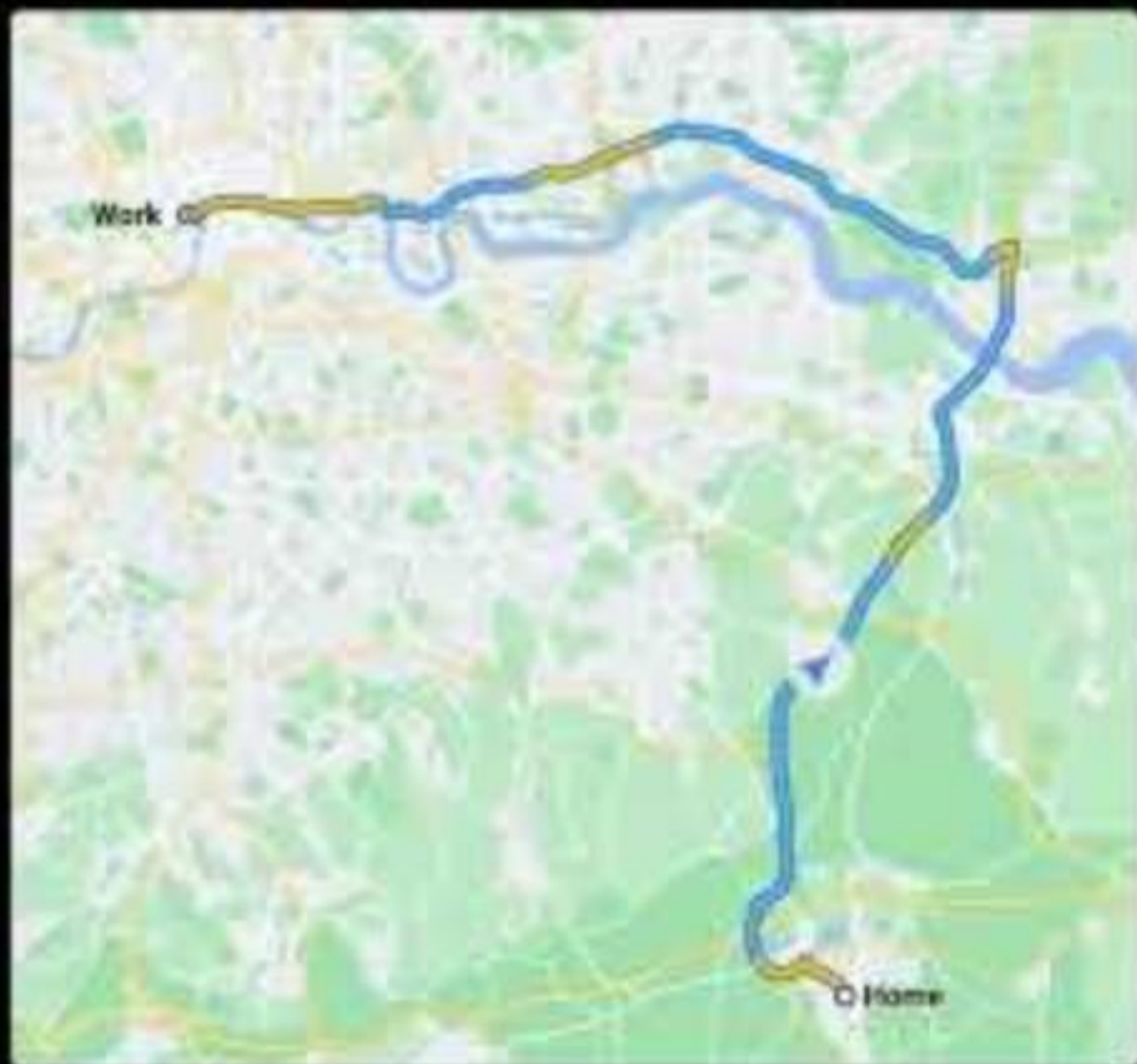
Amenities  
[Outstanding](#)



8:09

Cymbal Auto

Heads up Max. An accident has been reported on the A2 west of Darenth. I've updated your route to avoid the backup but you'll still arrive at the office 30 minutes later than originally planned. You may be late for your 9am meeting.



# The path to AGI is a journey

Majority of AI projects fail

- **Stay Nimble vs Fixed Strategic Plan**
- **Integrate AI where consumer friction is**
- **Assess feasibility**
- **Experiment in business units where early adopters are**
- **Build an Internal Learning Compass to prepare for future possibilities**

# Methodology

## Omnibus Survey – UK & US

Online survey of 3250 adults. The sample was structured and weighted to be representative of the population by age, gender, region, social grade, education with a qualifier to identify travelers (68% travelers, 32% not;).

All findings included in the presentation reflect the views of travelers only, N=2,219

Fieldwork 5th - 10th April 2024

## YouGov AI Qual Explorer

We add an open-ended question to a quantitative survey and receive AI thematic analysis to qualitatively explore the issue. Country: UK; N=500  
Fieldwork 24<sup>th</sup> April