

From Isolation to Connection

It's been nearly a year since the world went into lockdown, and in that time we have probably been more physically isolated than at any other point in human history. Many people are feeling the painful effects of this isolation, and loneliness is pervading society. Technology has provided a means of digital connection, but this is more synthetic and less fulfilling than real human connection—something we desperately miss.

Most of us also miss traveling, and thinking about traveling lifts our spirits and gives us hope. We yearn to be with the people we care about, and this is the main reason why many of us are eager to travel as soon as we feel safe doing so. Any of us trying to predict the future were humbled by 2020 so I won't be making any long-term predictions. That said, it seems we have enough information now to give a glimpse of what travel in 2021 will look like.

Once people feel safe to travel, they will. But it will look different than before the pandemic. Travel will be viewed as an antidote to isolation and disconnection. People don't generally miss landmarks, crowded shuttles, and lines and lobbies packed with tourists. Mass travel is really just a different form of isolation—you are anonymous, herded around with other travelers, never really experiencing the people and culture of a community. What people want from travel now is what they've been deprived of—spending meaningful time with their family and friends.

In 2021, travel will be less about where you go and when you go, and more about who you are with and what you can do together. More people working from home means more flexibility around when and where they travel. Because of this, there will be fewer travelers visiting the same destinations at the same time, reducing the masses that give mass travel its name. Wherever we go in 2021, for most of us, it won't be far from home. We will get in cars and travel nearby, dispersing to thousands of smaller cities, towns, and rural communities, making tourism an important part of how local economies recover.

The pandemic's mark on travel will live on, with some pursuing more affordable options and others changing how they travel for business. Affordable travel will be more important than ever as people's economic troubles persist; even so, it will not stop most people from traveling. Business travel is the form of travel that people miss the least and is not going to come back like before. Still, connecting in real life still matters, and much of the void left by the old business travel will be replaced by new business travel. Remote workers distributed far and wide will travel to hubs to spend time with their co-workers, often staying longer than just a few nights.

Last year, I said that travel as we knew it was never coming back. It's now becoming clear that we are undergoing a broad shift—a shift from mass travel to meaningful travel. Our own data has suggested as much, and our new US survey helps to confirm this. While this survey is just of American consumers, we believe that these views are representative of how people feel all around the world. The need to connect and be together is universal. Even this pandemic won't keep us apart for long.



Brian Chesky

About this report:

This US travel report is based on findings derived from public opinion research conducted in late December 2020 and select insights from activity on the Airbnb platform from the second half of 2019, before the pandemic began, through Fall 2020.

All survey findings, unless otherwise specified, are from a nationally representative poll of the US adult population conducted by ClearPath Strategies from December 18–23, 2020, n = 1,036, with a margin of error of +/-3.1%.

Americans miss traveling.

Travel is the out-of-home activity that Americans have missed the most. Significant percentages of them feel cut off and lonely, and just thinking about travel lifts their spirits and gives them hope. Reconnection is the top motivation for traveling, and both reconnection and travel are leading motivations for getting vaccinated:

- The pandemic has left most Americans feeling less connected to anyone they haven't been living with: 53% feel less connected to their extended family; 53% feel less connected to their friends; 56% feel less connected to their local community; and about three in five feel less connected to their fellow Americans (58%) and the rest of the world (59%). One quarter of Americans (24%) report feeling either loneliness or emptiness.
- The prospect of travel, however, makes people feel much more positive and optimistic. On a typical day, 45% of Americans report feeling hopeful and 42% feel happy. Thinking about travel boosts their happiness by 18 percentage points, to 60%, and boosts their hopefulness by 9 percentage points to 54%.
- The out-of-home activity that Americans miss the most is travel for pleasure—just ahead of going to restaurants and bars, and more than attending sporting events or other live experiences.
- A majority of people are ready to travel again: 54% say they have either already booked travel, are currently planning to travel, or expect to travel in 2021. These aspiring travelers skew younger, while the aged 50+ set remain more cautious. Majorities of people under age 50 (including 57% of 18- to 29-year-olds, and 60% of 30- to 49-year-olds) report already booking, planning, or expecting to travel in 2021, compared to 45% of those aged 50+.

They want to travel to connect with family and friends.

In the near term, the travel that Americans are looking forward to after the pandemic is very different from the kind of travel they did before the pandemic. They are prioritizing more personal, more meaningful trips centered on family, friends and staying close, while deprioritizing more adventurous journeys and packaged tours:

- As they think about traveling post-pandemic, connecting with family and friends is the type of travel that has grown most in importance for them: 41% say connecting with family and friends in person will be much more important after the pandemic, almost twice the percentage who say travel to accomplish personal goals (22%). By 52% to 21%, Americans would rather disconnect from technology and leave their phones at home than bring their phones along to visit popular places to get content for social media.
- Even in 2020, in the midst of the pandemic, this desire for connection with loved ones emerged on Airbnb in the form of all-time highs in the percentage of bookings for family travel or groups of five or more.

- After their own health and the safety of others, the ability to connect with friends and family is their top reason for getting vaccinated (37%), followed by the ability to feel safe to travel (32%).
- Spending time with friends and family is the type of travel Americans say they miss the most. Half (51%) say the first people they will visit after the pandemic are their immediate family, followed by friends (39%) and extended family (33%).
- Even after their first trip, Americans will prioritize travel that connects them with favorite people and places: 32% want to be close to family, 31% prioritize a new experience or destination (31%), preferably nearby, and 25% want to return to a favorite destination (25%).
- Looking at it by age, older Americans (50+) are most interested in future travel to be close to family (33%) and to revisit a favorite spot (32%), followed by a new experience or destination (29%). Younger Americans remain most interested in a second trip as a new experience or destination (35%), followed by travel to be close to family (31%), then travel to be close to nature (23%) and returning to a favorite place (23%).
- Asked what they would like to do, respondents volunteered:
 - “Get all my family together and go on a vacation to the beach.”
 - “Take a trip to see family and friends in a different state.”
 - “I will visit some of my friends who I haven’t seen in over a year and just hug them.”
- The top three traits of meaningful travel are lasting memories (44%), time with loved ones (39%), and discovery and learning (26%).
- Asked to describe meaningful travel in their own words, nearly one third (31%) described it as “togetherness”—the most common response overall. One quarter (24%) described it as “exploring new and different places;” and one in five described it as “family-centered.” “Togetherness” also was the most common response among those for whom post-pandemic travel is a high priority.
- For a significant percentage of survey respondents (37%), their definition of meaningful travel has changed since the pandemic to become even more focused on being with loved ones. These people also say they intend to travel more after the pandemic, with nearly one in two (46%) saying they will travel more for pleasure, such as by going on vacation and to visit family.
- The fact that more than one third of Americans say their definition of meaningful travel has changed since the pandemic suggests a real shift is occurring—and one that is happening disproportionately among younger travelers. An evolution is underway as younger travelers enter the market. More than two in five young people—42% of 18- to 29-year-olds—say the types of travel they find meaningful have shifted in this way since the pandemic, compared to 30% of those aged 50+ who say the same.

They are flexible on when and where they travel.

People face unpredictable travel restrictions and new work and school routines—allowing two in five Americans to work or study from home. There is also a strong desire to avoid the crowds of popular destinations and peak travel seasons. All of this works to make Americans more flexible about when and where they travel:

- Now that remote work and learning are giving many people more freedom to choose when they travel, a significant percentage of Americans are more open to traveling during off-peak times of year and days of the week—one quarter of those surveyed, in both cases.
- On Airbnb, we also have seen travelers become more spontaneous, booking much closer to their travel dates. Across all searches on Airbnb globally in Q3 2020, longer lead times shrank year-over-year while lead times of less than one month grew.
- The absence of the usual work-and-school parameters dictating people’s travel windows, together with the ability to work or learn from anywhere, also allows for longer trips. Almost one in five Americans (19%) say they have rented a vacation home for a stay of at least 28 days since the pandemic began. About one quarter (24%) of those surveyed see themselves undertaking more longer-term stays. In September 2020, Airbnb saw more bookings for stays of 28 nights or longer than in September 2019. Overall for Q3 2020, nights booked for stays of 28+ days also increased from Q3 2019.
- Travelers are rethinking where they go. Before the pandemic hit, our top 10 destination cities for the second half of 2019, by nights stayed, were Barcelona, Lisbon, London, Los Angeles, Madrid, New York City, Paris, Rome, Seoul and Toronto. In 2020, smaller, lower-profile destinations saw major growth in demand. These types of destinations have been among the largest year-over-year increases in searches for 2021 bookings: Derbyshire, UK; Rodanthe, on the coast of North Carolina; Forks, Washington, the main setting for the Twilight series; and the Muskoka Lakes, a few hours’ drive from Toronto.¹

But, they want to travel nearby.

Beyond the challenges of navigating international travel restrictions, concern about COVID-19 and increased interest in feeling comfortable and safe is prompting many travelers to choose destinations that are not just domestic but much closer to home:

- A strong majority (56%) prefer a domestic or local destination versus just 21% who want to visit someplace international and farther away.
- One in five Americans say they want their destination to be within driving distance of home.

¹ Top 20 trending search destinations globally based on at least 10,000 searches in 2020. Data compares growth in searches from March through December 15, 2020 for 2021 trip dates versus searches from March through December 15, 2019 for 2020 trip dates.

- Travel by car is the only type of travel that draws majority interest, and beats air travel by 17 percentage points. A majority of Americans, 55%, are “extremely” or “very interested” in taking a trip that is within driving distance. After a trip involving air travel (38%), visiting a new city ranked third in interest at 33% and traveling to warmer weather ranked fourth at 29%.
- These sentiments echo shifts seen in travel on Airbnb from the second half of 2019, when travel distances over 3,000 miles were our most popular segment², to June 2020, when trips between 50 miles and 500 miles not only recovered despite the pandemic but returned to year-over-year growth.
- Another travel trend that has taken root during the pandemic is virtual travel—experiencing a destination or engaging in a cultural activity while in your own home, using a computer, tablet or phone. Almost one in five Americans (18%) have participated in travel this way, and of those respondents, nearly half (47%) say they felt a genuine connection with the place, while one third (33%) felt a connection with the host.
- At Airbnb, we launched Online Experiences in April 2020 to help Experience hosts continue earning income and connecting with guests while all are sheltering at home. We have since launched hundreds of Online Experiences, with about eight in 10 guests booking from outside the hosts’ home countries.

They want travel that is affordable.

The desire to reconnect is universal, and as younger travelers venture out and many aspiring travelers grapple with changed personal finances for months or years to come, people will continue to need affordable options for travel:

- Affordability is the top priority overall when it comes to choosing accommodation not just for the first trip but for future travel indefinitely (54%), beating health and safety protocols by 10 percentage points.
- Nearly three in five Americans (58%) earning less than \$50,000 per year say they are booked, planning or expecting to travel in 2021, while 75% of Americans earning over \$100,000 say the same.
- Among Airbnb guests, 53% tell us they choose Airbnb to save money while traveling. Airbnb listings are often less expensive compared to average hotel prices in the same city, and listings often provide greater value through more space and amenities.³

² July–December 2019.

³ January 2020 global survey of guests who used Airbnb in 2019.

They miss business travel the least.

Through the pandemic, technology has proven that much of business travel is expendable, and Americans show little emotional attachment to it. When business travel does begin to recover, it will likely look different from before.

- Business travel ranks as the out-of-home activity people miss the least: 5%, versus 37% for leisure travel.
- It is also the type of travel people miss the least: 6%, versus travel to spend time with loved ones at number one with 48%. More than one third of people surveyed (36%) expect to travel less for work after the pandemic compared to before it began.
- The pandemic has institutionalized remote working for many companies—two in five Americans (41%) are able to work or study from home at least some of the time. In another recent survey commissioned by Airbnb⁴, 35% of respondents say it will become more common post-pandemic for people to relocate to new places so they can take advantage of the ability to work remotely. As employees become more widely distributed across remote locations, a greater share of business travel will likely consist of employees traveling from these locations to gather at their workplaces.

Finally, they want to stay safe.

When traveling, Americans care about the health and safety of their families and the communities they visit. At the same time, travel destinations around the world have become highly sensitive to the behavior of visitors and how they follow local health guidelines.

- One third (32%) of Americans want the “vast majority of people” at a destination to also be vaccinated in order to consider traveling there; 30% will want testing to be available there; and 29% will want to have urgent care available.
- The pandemic has shaped people’s views of what it means to travel responsibly. Given a range of possible definitions, the top choice was “avoiding risky behaviors” (21%) and the second most popular choice was “respecting local health protocols” (17%). Eighty-seven percent said that traveling responsibly was important to them (62% called it “very important”).
- One benefit of travel trends prompted by consumers’ concern for their own safety and the safety of others is that they also have the effect of making travel more sustainable—as consumers shift from far-off destinations to destinations within driving or rail distance; from fragile but popular tourist hotspots to less discovered destinations; from other trappings of mass tourism such as tour buses to authentic activities; and from hotels to existing homes.

⁴ September 15–19, 2020 survey of 1,010 US adults by ClearPath Strategies, MoE +/-3.1%.

From mass travel to meaningful travel.

As the pandemic's chokehold on travel starts to ease, it seems likely that mass tourism's hold will loosen, too, as travel in 2021 becomes about who you are with and what you will do together, not where you go or how you are moved around.

Back in 2020, we said that travel as we knew it had ended. We didn't know at the time what it would look like when it returned—but now, at least for the near future, we do. Airbnb's business showed resilience last summer and fall, despite the pandemic, as travelers sought out entire homes in nearby or remote locations. These homes provided them with safe, affordable, well-equipped spaces where they can gather with family and friends, or work or study from “home” during a long stay.

As Americans prepare to travel in 2021, their vision for travel looks very similar, prioritizing real connection, not synthetic connection through technology or mass tourism, and making choices that can help make real connection happen.

People will travel more meaningfully in 2021. Mass travel will be back, but may never fully return.



Airbnb Headquarters in 2021, San Francisco, California

