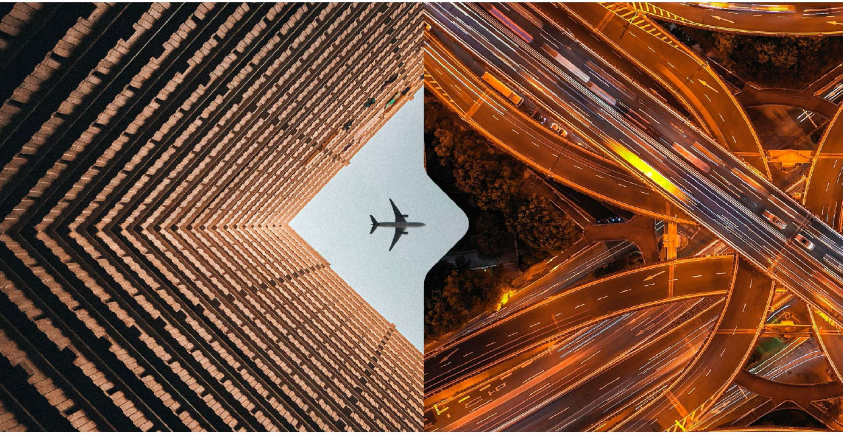
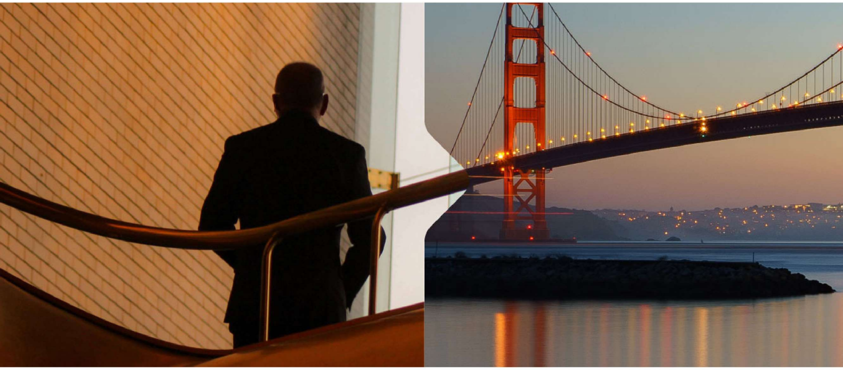
# The Evolution of Travel:

## CarTrawler's Consumer Trends for 2022



The events of recent years have had a big impact on how consumers travel. COVID-19 has of course been the biggest factor, with travel companies and even countries struggling to keep pace with the latest health protocols. The global supply chain crisis and climate change have also been factors in consumers' travel plans. With all this, it seems that no longer does a journey of a thousand miles begin with just a single step.

But what impact will new regulations and complications have on the travel industry? As brands try to keep pace with shifting consumer preferences, we wanted to gain some perspective on exactly how travel has evolved. CarTrawler conducted a survey among adults in the U.S. and U.K. to uncover some of the trends impacting the future of travel and provide perspective for the industry in this new era. The data fell into five insights:



### 1 Travelers Have Sky-high Demands

People still love to travel, but attitudes have evolved — they want safer options and more convenience. Even with higher standards, **73% of travelers are positive toward traveling again**, given what they've heard, seen or experienced.

### 2 Companies Must Prioritize Flexibility & Transparency

A majority (70%) of travelers would make changes to how the industry operates if they could. With the ever-changing landscape of pandemic-induced rules and regulations, **consumers want more convenience, flexibility and transparency.**

### 3 Sustainability Is the New Standard

Travelers in the U.S. and U.K. want more sustainable travel options and are willing to pay extra for them. Almost three-quarters, or **73% would be willing to pay more to rent a sustainable and environmentally-friendly car.**

### 4 Brands Need to Cater to Younger Travelers

The pandemic did cause some consumers to shift their travel preferences, as well as their decisions to fly vs. drive. People are getting out there — **85% of travelers have gone on road trips in the last two years** — and many of them were millennials and Gen Z renting cars for the first time.

## 5

## Loyalty Gives Long-term Value

An overwhelming majority of travelers belong to some kind of points or loyalty program, saving them hundreds of dollars per year. **Airlines and hotels have the most popular loyalty programs,** with “cash back” and “points” being the top reasons for joining.

This report should help brands navigate the impact of the changing global economy and gain insight into where, why and how consumers are traveling this year. The findings can provide a roadmap for how to adjust to what a new breed of traveler wants and how to plan brand initiatives and messaging in the coming years.

## 1

## Travelers Have Sky-high Demands

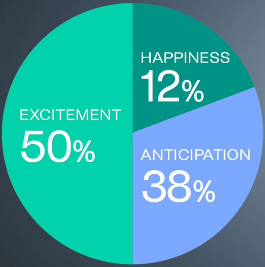
Many of us have experienced cabin fever to some degree as the pandemic has continued to restrict public gatherings. For this reason, among others, travelers are looking forward to traveling again. But despite having a rekindled sense of wanderlust, health concerns around COVID-19 still persist for some adventurers.

### Ready For Takeoff

Travelers across the U.S. and U.K. feel good about upcoming travel when thinking about the prospect of traveling right now or in the very near future.

**77%**

**Travelers who experienced positive emotions while traveling. The top three were:**



Only 23% of travelers expressed negative emotions when thinking about the prospect of traveling.

**51%** **Travelers who expect to do more domestic leisure travel in the coming year**

**43%** **Travelers who expect to do more international leisure travel**

## COVID-19 Gave Travelers Confidence

For many, the pandemic effect (new rules and regulations, additional cleaning) has given them more confidence in flying — especially people who have traveled recently. While 60% of travelers whose last trip was over a year ago are concerned about health and safety if they were to travel now, only 36% who've taken trips within the last year share that concern.

**Travelers are more likely to travel by airplane because:**

**41%**
It feels safer and cleaner now

**40%**
They personally love flying

**34%**
COVID-19 rules provide confidence

## 2

## Companies Must Prioritize Flexibility & Transparency

For some, travel was enough of a hassle before social-distancing and mask-wearing were commonplace. To make things easier on the average consumer, brands will want to prioritize giving consumers options, expanded freedoms and clear communication around policies and updates.

### Convenience Is King

Travelers are feeling good about taking that next trip but 70% would make changes to how the industry operates if they could. Specifically, 40% rank convenience as a top priority when planning a trip.

### What would travelers change?

**61%**
The booking process

**55%**
Book flights and rental cars together

**51%**
A single app to manage entire trip

### Flexibility Is A Premium

People are looking for additional flexibility compared to pre-pandemic days — and they're willing to pay for it:

**73%** **Willing to spend more for flight insurance now vs. before the pandemic**

**36%** **Risk of canceled flights and bookings is a top concern when thinking about traveling**

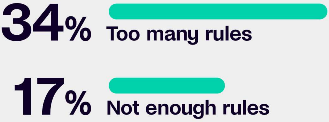
### Share Tactics

Health regulations have created a divide between travelers:

**53%** **Think travel providers are sharing enough about their COVID-19 policies**

**37%** **Wish there was more explanation for why policies are in place or how trips could be impacted**

Do travel providers' COVID-19 policies have too many rules?



**34%** **Too many rules**

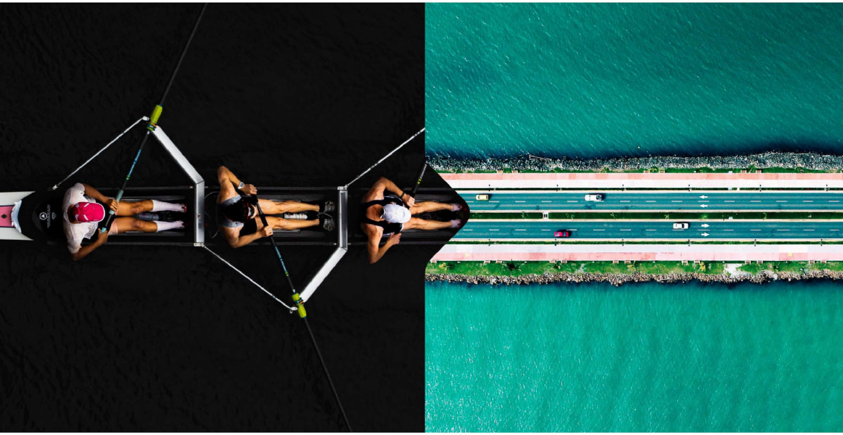
**17%** **Not enough rules**

### Seeking Transparency

Hidden fees and confusing policies are common pain points.

**Top frustrations when renting a car:**

| 36% | 31% | 24% | 24% |
|---|---|---|---|
| High cost | Hidden fees | Lack of choice | Confusing insurance options |



## 3 Sustainability is the New Standard

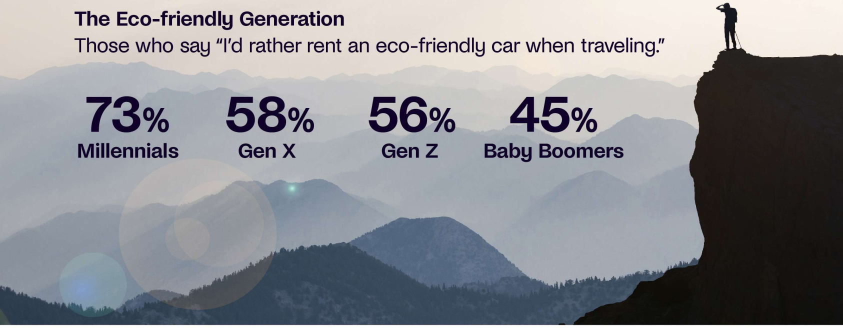
Though there is a generational divide on the importance of sustainability, most travelers value having environmentally-conscious options. For instance, the top reason travelers would choose to rent a car is because they care about the environment — beating out "saving money on gas" as reason number two. In the end, it pays for brands to go green.

### Sustainability Across The Pond

Travelers in the U.S. and U.K. want more sustainable travel options across modes of transport:

**55%** **"I'd rent an eco-friendly car over a gas guzzler."**

**33%** **"I would prefer to rent an electric vehicle while traveling."**



### The Eco-friendly Generation

Those who say "I'd rather rent an eco-friendly car when traveling."

**73%** Millennials

**58%** Gen X

**56%** Gen Z

**45%** Baby Boomers

### The Cost of a Green Conscience

Overall, travelers are willing to pay extra for more sustainable options. Almost three-quarters (73%) would be willing to pay more to rent a sustainable and environmentally-friendly car and 52% would choose an airline that has pledged to be carbon neutral over one that has not.

Average daily amount — by country — consumers are willing to spend to rent a sustainable and environmentally-friendly car.

**$22**

**£14**

For others, a lack of eco-friendly options make them less likely to take that mode of transportation at all:

**34%** **"A lack of environmentally-friendly options decreases my willingness to rent a car."**

**34%** **"Carbon emissions are my biggest hesitation with flying."**

## 4

## Brands Need to Cater to Younger Travelers

When we gauged preferences for modes of transportation, air travel narrowly beat out personal vehicles. But trends show that consumer opinions could be making a U-turn with almost half of respondents saying the pandemic has made them more likely to use their own car next time they travel.

### Planes, Trains or Automobiles?

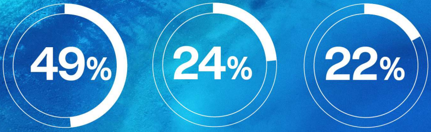
**78%**
**Airplanes**

**73%**
**Personal Vehicle**

**40%**
**Rental Vehicle**

### COVID-19 Changed the Way We Travel

**The pandemic has caused some consumers to shift their travel preferences and their fly-or-drive decisions:**



**49%** Now more likely to use their own car

**24%** Now more likely to use a rental car

**22%** Now more likely to use an airplane

Among those consumers, 34% say it's now easier to find flights at the time and destination they need.

## Going the Distance

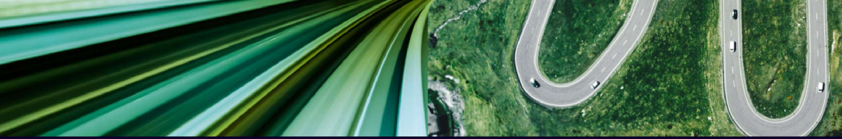
**35%** Travelers say that the distance they are willing to drive instead of fly has increased during the pandemic.

**11%** Travelers say they are less willing to drive long distances now.

## Road Trippin': A Pandemic Pastime

In the last two years, 85% of travelers have gone on road trips. In the last six months, here's who's gone on a road trip:

| 65% | 55% | 41% | 40% |
|---|---|---|---|
| Baby Boomers | Gen X | Gen Z | Millennials |



First time renting a car for a road trip in the last two years:

| 74% | 72% | 49% | 16% |
|---|---|---|---|
| Gen Z | Millennials | Gen X | Baby Boomers |

## 5

## Loyalty Gives Long-term Value

An overwhelming majority of travelers (86%) are enrolled in a loyalty program, and they're doing it for the savings. On average, travelers' loyalty programs saved them $277 USD and £122 GBP per year.

### Who's Got The Points?

Top loyalty programs consumers are enrolled in:

| 45% | 41% | 35% | 35% |
|---|---|---|---|
| Airlines | Hotel | Cash Back Points/Miles Credit Cards | Retail |

### It's All About the Benefits

Travelers' main reasons for being enrolled in a loyalty program are:

**46%** Cash Back Earning Points/Miles for Spending

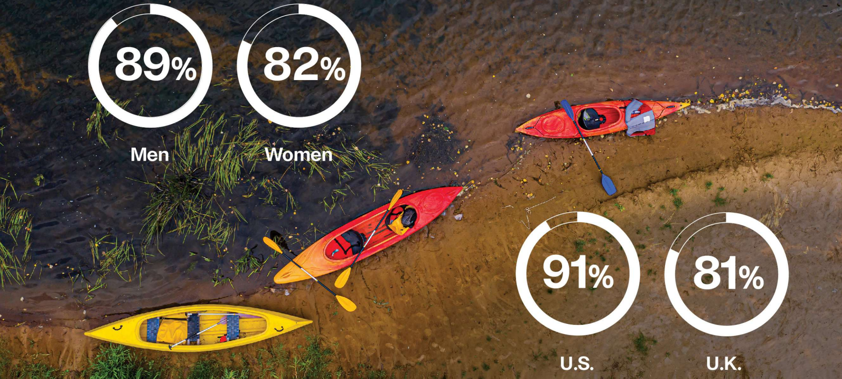
**43%** Discounts

**33%** Free Trips

**Nearly 1 in 5** Consumers who rank earning or using loyalty rewards as a top priority when planning a trip.

## The Demographics on Loyalty

Who's more likely to be enrolled in loyalty programs?



**U.S. travelers are also more likely to rank "Earning and using loyalty rewards" as a top priority when planning a trip (21% US, 14% UK).**

## Key Takeaways

As we enter a new era of travel, new travelers are defining what the industry will look like. Younger generations are eager to see the world and experience places that have been restricted in recent years due to the pandemic. As a result, confidence in travel is rising, as is consumers' open-mindedness about which modes of transportation they'll choose and where they'll go.

Transparency and convenience are a must. Customers are more savvy and more demanding when it comes to accessing information and wanting flexible options. Possibly even more important is providing travelers with sustainable choices. The brands that will win are the ones who understand how to attract younger consumers with eco-friendly priorities. Green travel options will be a major driver for growth as planet-conscious millennials and Gen Z hit the road.

In the digital age, consumer preferences are shifting, and the next evolution of travel needs to shift to accommodate. Brands that will succeed with the new crop of adventure-seekers are ones that can leverage technology to provide more flexibility and convenience. But companies should also consider the humanity behind their technology and processes, remembering that there is always a user on the other end. Consumers want a seamless mobile infrastructure to help manage their travel experiences, and brands that can make travel less complicated and more rewarding will reap the benefits of loyal customers for years.

## Methodology

CarTrawler conducted this research using an online survey prepared by Method Research and distributed by Dynata among n=2,000 adults ages 18+ in the United States and United Kingdom who have traveled within the past two years. The sample was equally split between gender groups, with a nationally representative geographic spread of respondents and roughly equally sized age groupings within each country. Data was collected from November 24 to December 9, 2021.

## About CarTrawler

CarTrawler is the leading B2B technology provider of car rental and mobility solutions to the global travel industry. Our purpose is to drive successful partnerships. CarTrawler's end-to-end technology platform expands our airline and travel partners' offering to their customers, creating substantial ancillary revenue opportunities. We provide unrivalled breadth and depth of content worldwide, including car rental, private airport transfer and ride-hailing services.

CarTrawler creates innovative, data-led solutions for some of the largest travel brands in the world, including United Airlines, American Express, easyJet, Alaska Airlines, SWISS, Hotels.com and Emirates. As a B2B company we focus solely on helping our airline and travel partners build their brands, not our own.

Our mission is to implement the technology that powers the travel sector. We do this through a fusion of human ingenuity & insight and technology and performance innovation. We call this Human Traveltech. This fusion unlocks commercial revenues for partners, increases conversion rates and provides a best-in-class customer experience. We know that success is built on trusted partnerships. That is why CarTrawler's purpose is Driving Successful Partnerships.

For more information about CarTrawler, visit www.cartrawler.com.