MULTI-NATIONAL TRAVEL TRENDS

A Global Look at the Motivations and Behaviors of Travelers
METHODOLOGY

ONLINE SURVEY

Data Collection Method
Quantitative Survey

Field Work
NA, APAC, EMEA: 30 March – 7 April 2017
LATAM: 1 March – 12 March 2018

Qualifying Criteria
Must have booked travel online in the past year

Sample Size | Total: n=11,008
Australia: n=1000
Canada: n=1001
China: n=1000
France: n=1002
Germany: n=1000
Japan: n=1001
UK: n=1001
US: n=1001
Mexico: n=1000
Brazil: n=1001
Argentina: n=1001
HOW TRAVELERS TRAVEL
NUMBER OF TRIPS VARY WIDELY BY COUNTRY

Mexican and Chinese travelers take the most trips, while Canadian travelers take the fewest.
NOT ALL VACATIONS ARE CREATED EQUAL

Argentinian travelers take the longest vacations on average, while Japanese travelers take the shortest.
INTERNATIONAL OR DOMESTIC

Europeans, Canadians, and Argentinians are most likely to have booked international travel in the past year.

- 73% in my country, 68% outside my country for Germany
- 59% in my country, 56% outside my country for Canada
- 54% in my country, 45% outside my country for Australia
- 31% in my country, 27% outside my country for Brazil
- 24% in my country, 18% outside my country for Mexico
- 14% in my country, 9% outside my country for Japan

Q14. Was the trip....?

Total (n=11,008)
RELAXING & SIGHTSEEING TRIPS RANK HIGH

Visiting family is more important for Americans, Canadians and Australians.
PLANES, TRAINS, AND AUTOMOBILES
Travelers largely travel by plane; Chinese travelers choose trains over cars

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Q16. How did you get to your destination?
Total (n=11,008)
HOTELS ARE THE PLACE TO STAY

French travelers are more likely to pick alternative accommodations

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Q17. Where did you stay on your last trip?
Total (n=11,008)
ALL TRAVELERS HAVE A BUDGET IN MIND
Japanese, British, and German travelers are most ready to spend

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Q18. Was budget a primary factor when you were researching/booking your last trip?
Total (n=11,008)
### How Travelers Spend

At least a third of the traveler’s budget is allocated to hotel and flight, with food closely following.

<table>
<thead>
<tr>
<th>Category</th>
<th>United States</th>
<th>China</th>
<th>Japan</th>
<th>Canada</th>
<th>United Kingdom</th>
<th>Germany</th>
<th>France</th>
<th>Italy</th>
<th>Mexico</th>
<th>Brazil</th>
<th>Australia</th>
<th>Argentina</th>
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</thead>
<tbody>
<tr>
<td>Hotel</td>
<td>27%</td>
<td>18%</td>
<td>34%</td>
<td>25%</td>
<td>31%</td>
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<td>Flight</td>
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<td>15%</td>
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<td>24%</td>
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<td>Food</td>
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<tr>
<td>Transportation</td>
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<td>11%</td>
<td>14%</td>
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<td>10%</td>
<td>8%</td>
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<td>9%</td>
<td>10%</td>
<td>11%</td>
<td>11%</td>
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<tr>
<td>Attractions/Tours</td>
<td>11%</td>
<td>15%</td>
<td>6%</td>
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<tr>
<td>Shopping</td>
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<td>Alternative Accommodations</td>
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<td>Other</td>
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Q20. What proportion of your travel budget did you spend on each of the following?

Total (n=11,008)
OTAs & SEARCH ENGINES TOP FOR PLANNING

Travel review/comparison sites also ranked highly, while Chinese travelers preferred social and blog sites.
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Q38: Please indicate which resources you used to book travel online on your last trip
Total (n=11,008)

**OTAs CONVERT THE MOST TRAVELERS**
Airline, hotel and other sites closely follow depending on where the traveler is from

<table>
<thead>
<tr>
<th>Resource</th>
<th>US</th>
<th>China</th>
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<td>Online Travel Agency</td>
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<td>Hotel Sites</td>
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<td>Alternative Accom Sites</td>
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</table>

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Q38: Please indicate which resources you used to book travel online on your last trip
Total (n=11,008)
SHOPPERS CONSIDER MULTIPLE DESTINATIONS

European travelers are least likely to have decided on a destination

Q23. Which of the following options best describes the way you feel when you first decide to take a trip? (Please select one)

Total (n=11,008)

- Deciding between 2 or more destinations
- Have already decided on my destination

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Most travelers are open to help and inspiration when planning a trip.

Q24. Which of the following options best describes the way you feel when you first start planning a trip/holiday?

- **Not sure I know how; may need inspiration**
- **Know exactly how; don’t need any help**

Total (n=11,008)
TRAVELERS LOOK FOR VALUE & EXPLORATION

‘You only live once’ and ‘off the beaten path’ opportunities also ranked highly in consideration.

Q8 Please select to what extent you agree with the following statements. (Please select strongly disagree, somewhat disagree, somewhat agree or strongly agree for each statement).

* Somewhat Agree/Strongly Agree responses reflected in these charts. Total (n=11,008)

- The most value for my dollar
- Anywhere that allows me to explore the outdoors and be active
- "Bucket list" experiences
- "Off the beaten path" + recommendations from locals
- Museums, historical sites and arts & culture

Countries: US, China, Japan, Canada, UK, Germany, France, Australia, Mexico, Brazil, Argentina

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While price is important, people make travel decisions based more on their heart than their wallet.

Activities & Experiences Drive Travel Decisions

- Activities I will be doing on my trip
- A once in a lifetime experience
- The cultural experience
- Lowest price
- My food experience
- Deals and/or special offers
- A place where I can vacation with friends
- Going somewhere for memorable pictures
- Outdoor activities
- Feeling pampered during my vacation
- Recommendations from family & friends
- Transportation available on the trip
- Going somewhere unique for shareable photos
- Online reviews from other travelers

For this exercise, you will go through a small number of different screens where we will ask you to identify which consideration would be most important to you in terms of how you choose a vacation/holiday and which consideration would be least important to you in terms of how you choose to purchase a vacation/holiday. Total (n=11,008)
ACTIVITIES & EXPERIENCES VARY

Japanese and Chinese travelers prioritize food experiences
INFLUENCES & KEY CONNECTION POINTS
SOCIAL MEDIA INFLUENCES TRAVEL DECISIONS

Pictures and deals were more influential than video, hashtags, and celebrities

Q29. How does social media influence you? Which of the following influence your decision in booking a trip?

- Pictures and deals were more influential than video, hashtags, and celebrities

- Travel videos posted by my friends
- Travel videos posted by experts
- Hashtags of destinations I am interested in
- Where celebrities travel

- Deal or promotion
- Travel pictures posted by my friends
- Travel pictures posted by experts (travel writers, bloggers, etc.)
- Blogs/articles about travel destinations

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Total (n=11,008)
Chinese, American and Brazilian travelers are particularly influenced by ads with appealing imagery and informative content.
TRAVELERS USE MOBILE THROUGHOUT THE JOURNEY

Chinese and Latin American travelers are most likely to use smartphones at all stages.
KEY INSIGHTS AND MARKETING TAKEAWAYS

**Travel decisions are emotional – appeal to both the heart and the head**
Complement promotional offerings with unique and visually appealing images that highlight once-in-a-lifetime experiences.

**Value does matter**
Highlight your special deals; draw attention to the entire experience.

**Most travelers are considering multiple destinations**
They’re open to suggestions, so get in front of them in the planning stages with inspirational messaging and images.

**Travelers turn to OTAs for inspiration and booking**
More than half of travelers are using OTAs in their trip planning process. Seek out opportunities for strategic partnerships.