



# MULTI-NATIONAL TRAVEL TRENDS

Connecting the Digital Dots:  
The Motivations and Mindset of  
Online Travelers

# METHODOLOGY



## ONLINE SURVEY



### Sample Size

**Total: n=8006**

|                   |                 |
|-------------------|-----------------|
| Australia: n=1000 | Germany: n=1000 |
| Canada: n=1001    | Japan: n=1001   |
| China: n=1000     | UK: n=1001      |
| France: n=1002    | US: n=1001      |



### Data Collection Method

Quantitative Survey



### Field Work

30 March – 7 April 2017



### Qualifying Criteria

Must have booked online travel in the past year

The background is a soft-focus photograph of a hotel room. In the foreground, an open suitcase is visible on a bed, containing folded white clothing. The bed has white linens and pillows. The overall tone is light and clean.

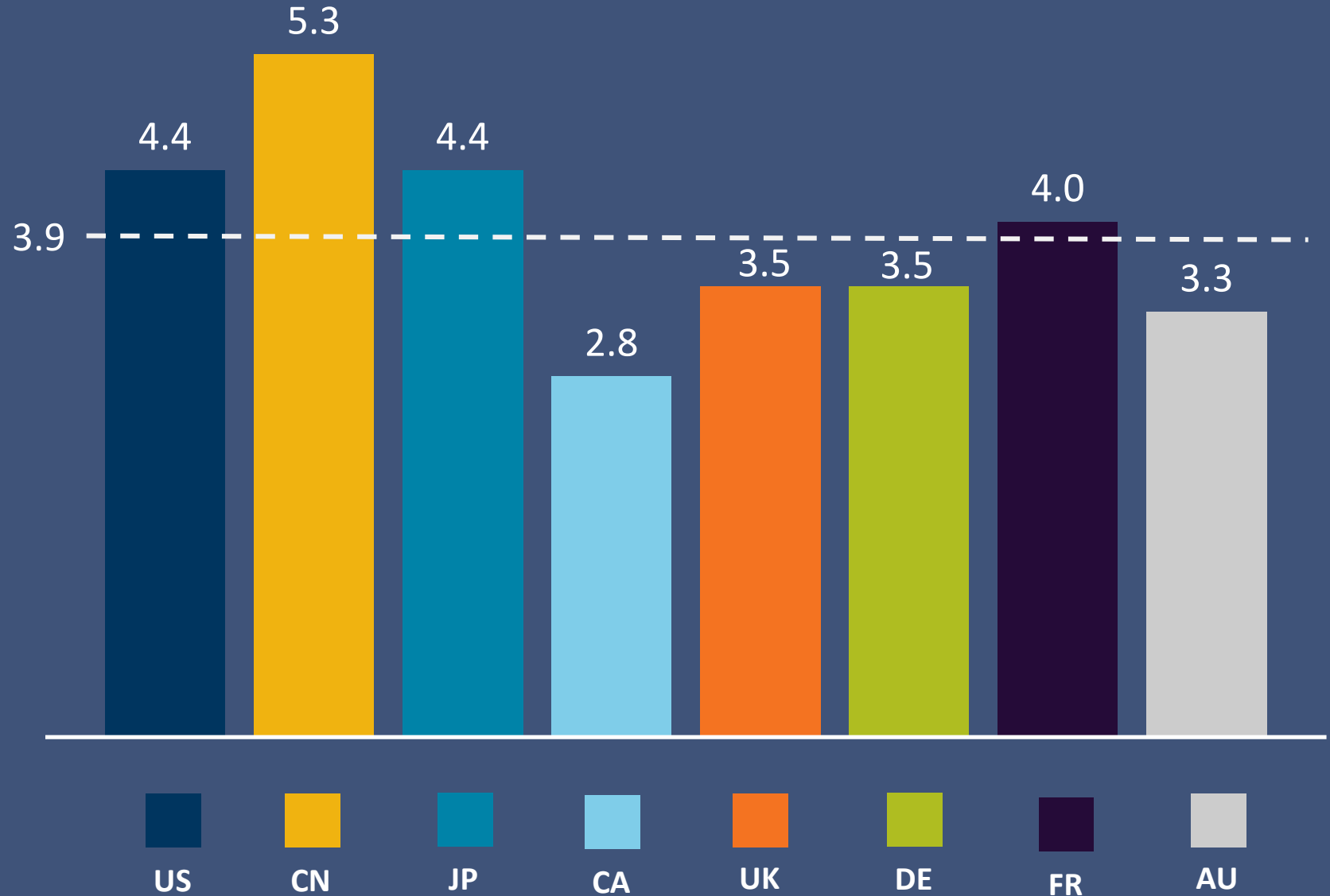
# **LAST TRIP LOOK BACK BY COUNTRY**

---

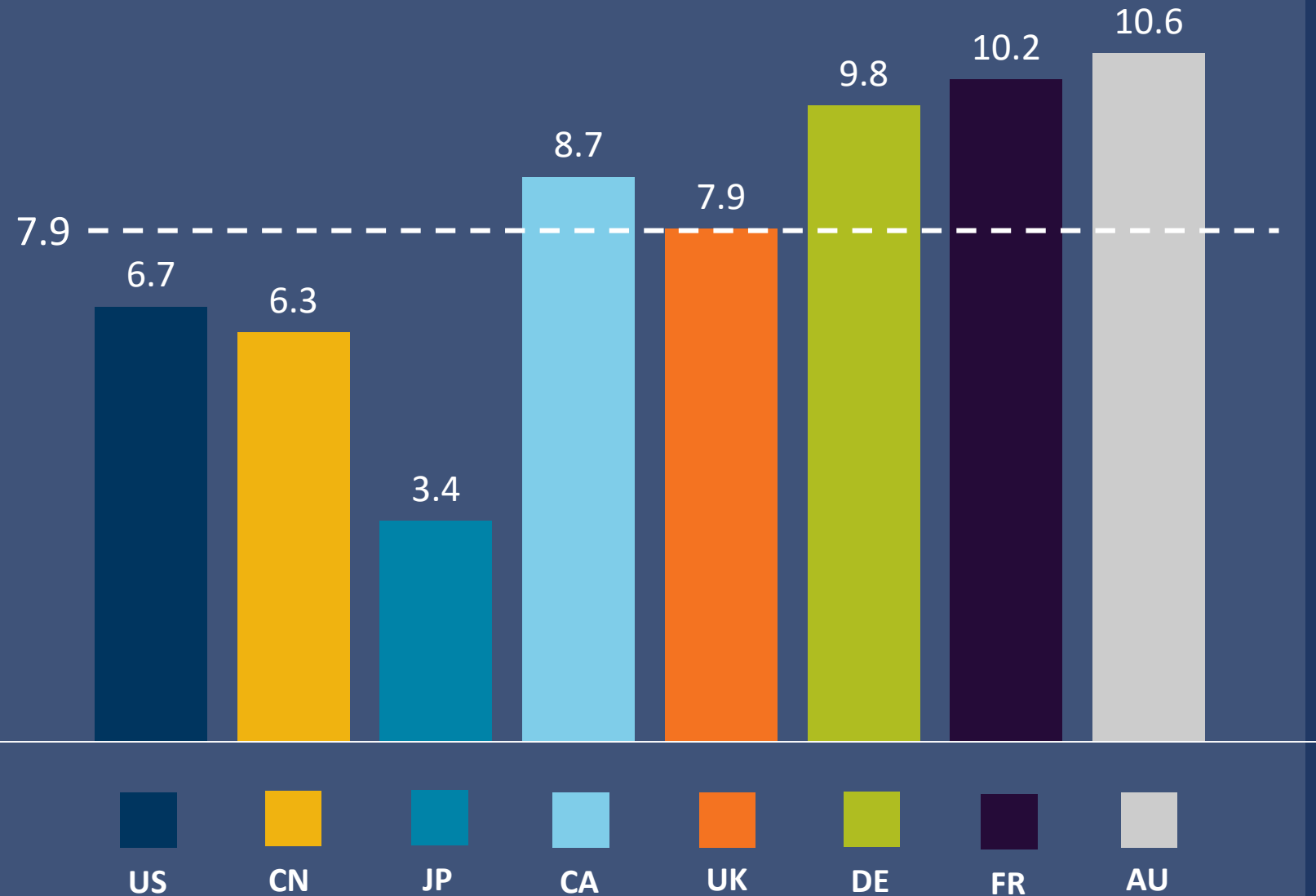
# NUMBER OF TRIPS PER YEAR VARIES WIDELY BY COUNTRY

Chinese travelers take by far the most with 5.3 on average, while Canadians take the fewest at under 2.8 trips

Total Number of Trips Taken in the Past Year



Last Vacation Duration in Days



# NOT ALL VACATIONS ARE CREATED EQUAL

Australians took the longest vacations averaging 10.6 days, while Japanese took the shortest averaging 3.4 days

# HALF PREFER TO EXPLORE BEYOND THEIR BORDERS

While others travel within their own country

18%



27%



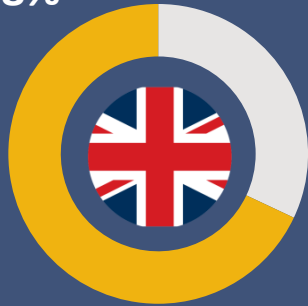
14%



45%



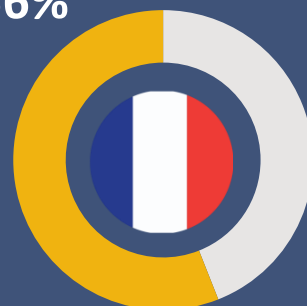
68%



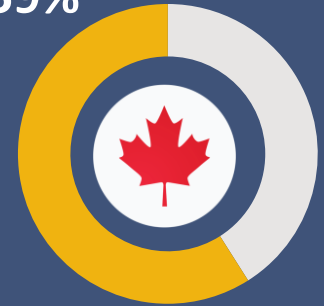
73%



56%



59%

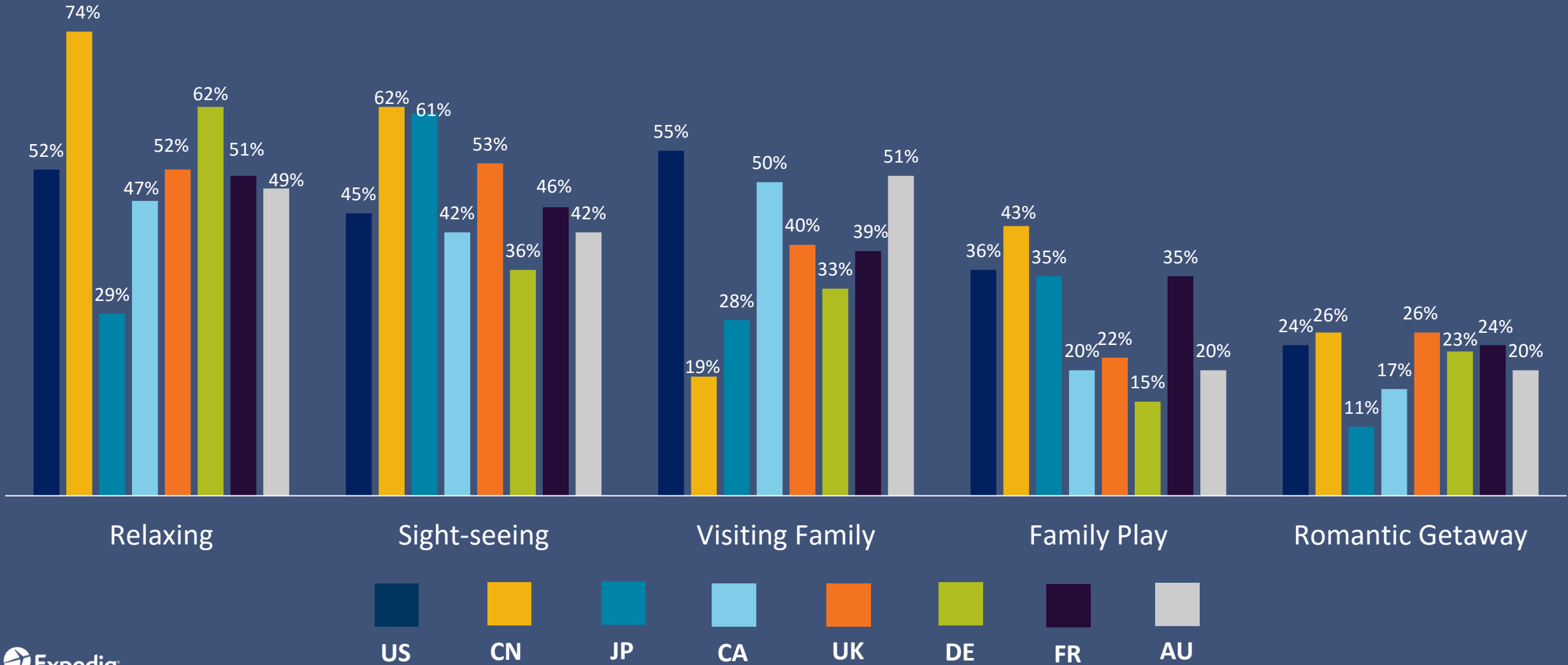


■ IN MY COUNTRY

■ OUTSIDE MY COUNTRY

# RELAXING & SIGHT-SEEING VACATIONS BIGGEST DRAW

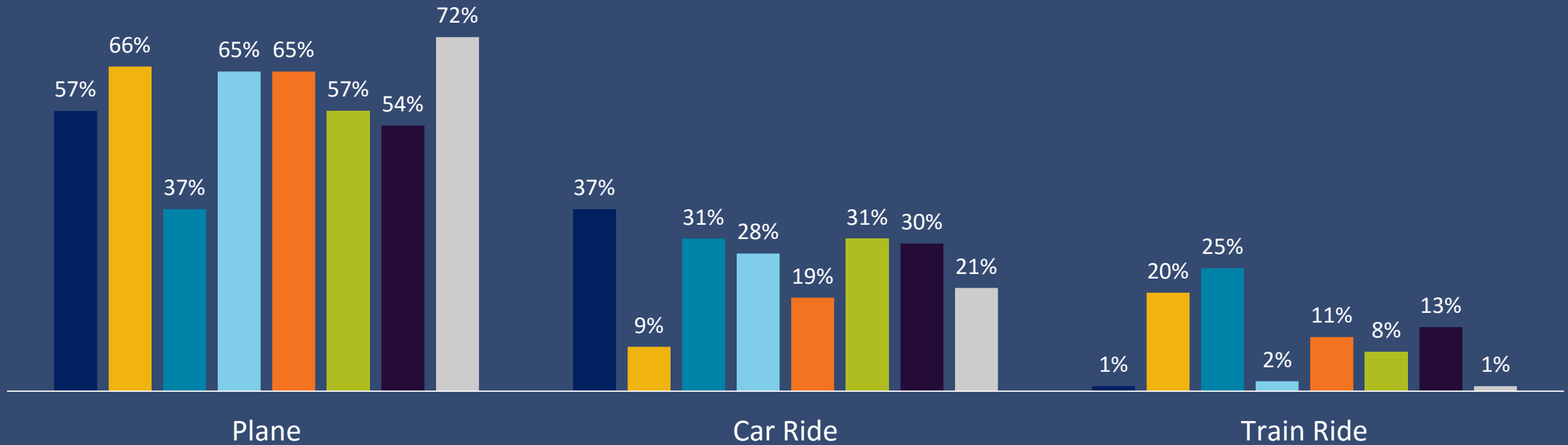
Chinese, Japanese & British travelers like to see the sights, while visiting family is big with Australians, Canadians and Americans



# PLANES, TRAINS & AUTOMOBILES

Most travel to their destination by plane, while Japanese are more agnostic about types of transportation

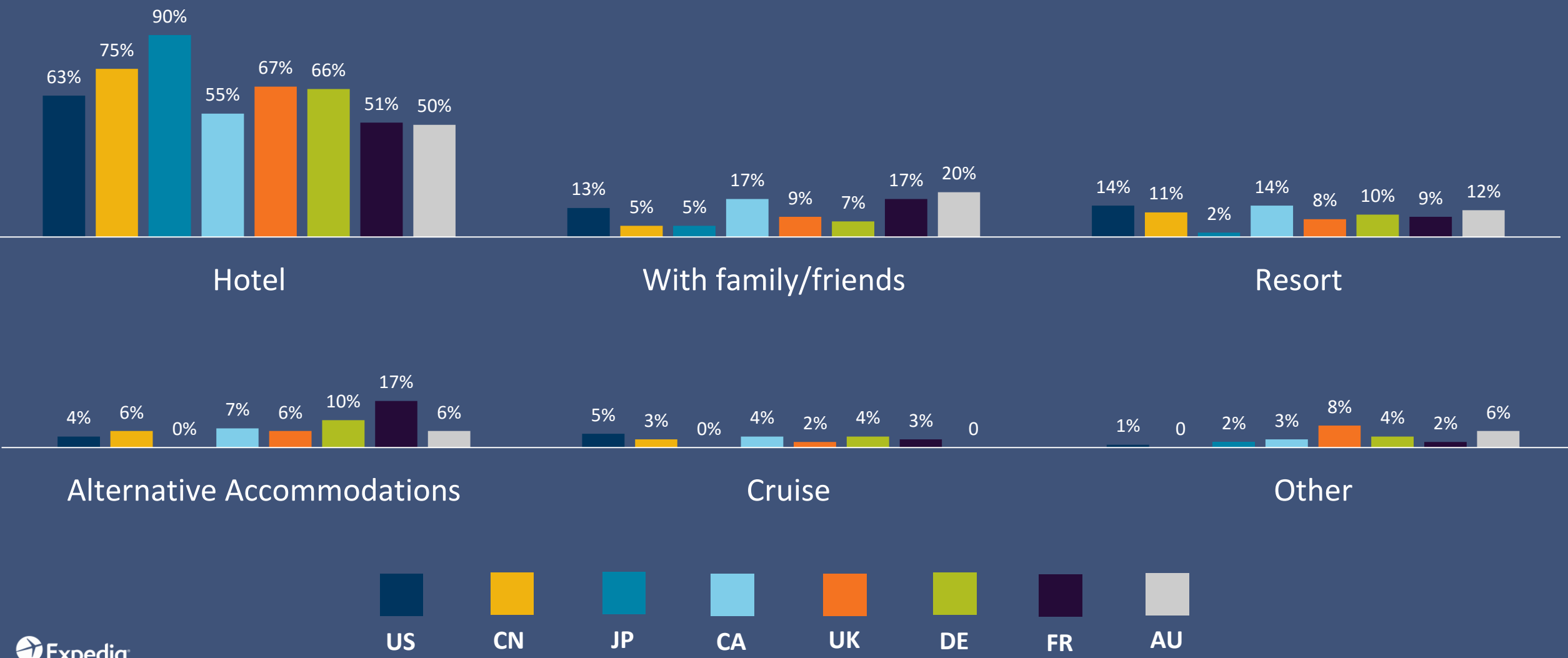
Type of Travel to Last Destination





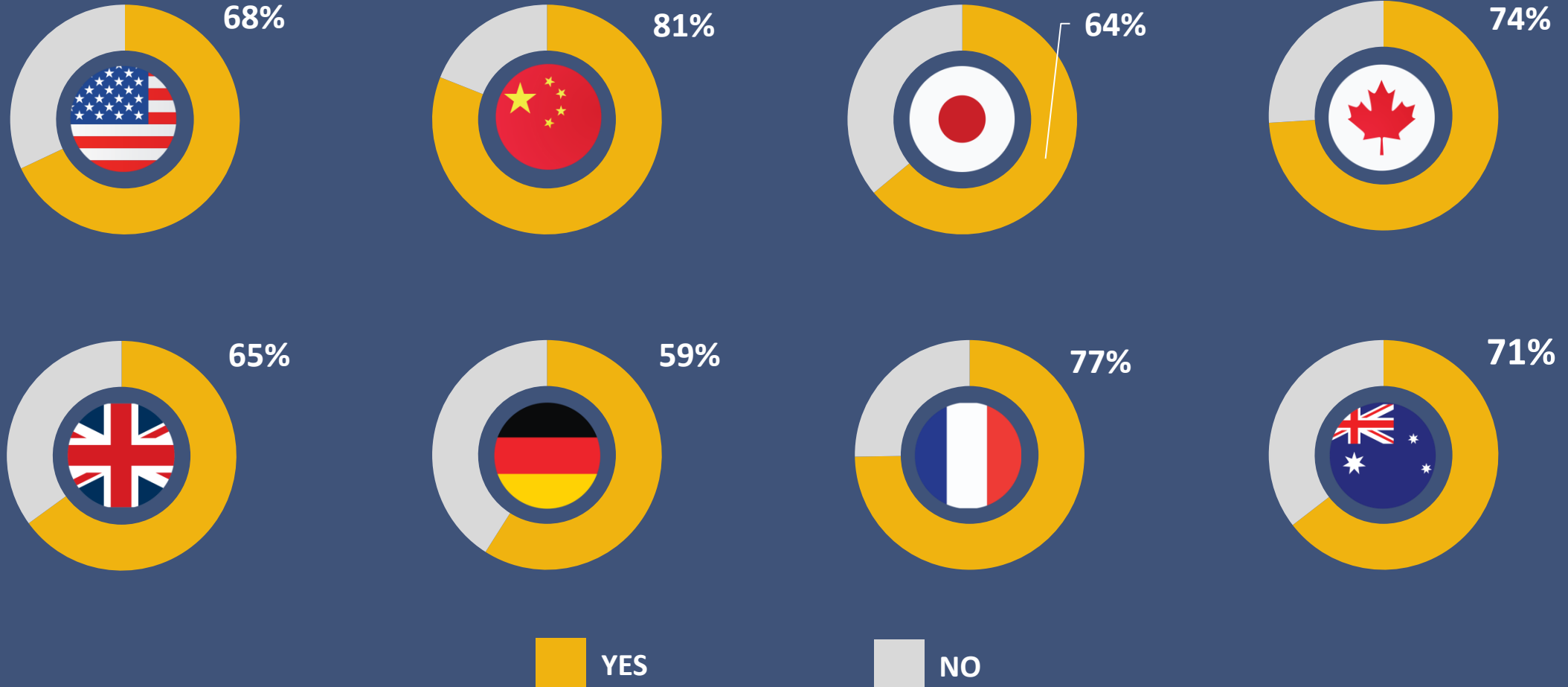
# HOTELS LEADING PLACE TO STAY

9 in 10 Japanese travelers stayed in a hotel; French travelers most open to alternative accommodations











# TRAVELERS HAVE A BUDGET IN MIND

Chinese, French and Canadian travelers especially consider budget a primary factor



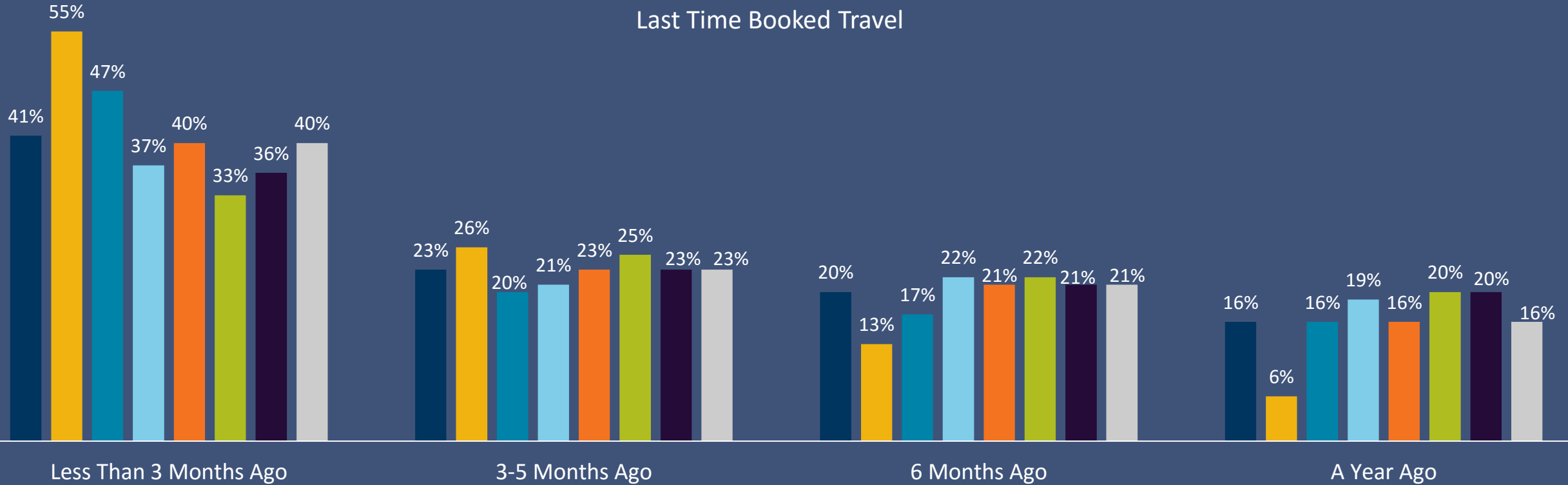
# HALF TO 2/3 SPENT ON FLYING, SLEEPING & DINING

Tours and shopping key attractions for travelers in market, especially for Chinese

| Proportion Spent On        |  |  |  |  |  |  |  |  |
|----------------------------|---|--|---|---|---|---|---|---|
| Hotel                      | 27%   | 18%  | 34%   | 25%   | 31%   | 31%   | 23%   | 23%   |
| Flight                     | 20%   | 15%  | 14%   | 24%   | 20%   | 17%   | 18%   | 25%   |
| Food                       | 17%   | 16%  | 18%   | 17%   | 16%   | 16%   | 16%   | 16%   |
| Transportation             | 10%   | 11%  | 14%   | 10%   | 10%   | 8%  | 12%   | 9%  |
| Attractions/Tours          | 11%   | 15%  | 6%  | 9%  | 10%   | 10%   | 11%   | 9%  |
| Shopping                   | 8%  | 16%  | 11%   | 9%  | 7%  | 8%  | 9%  | 9%  |
| Alternative Accommodations | 4%  | 5%   | 1%  | 3%  | 3%  | 6%  | 7%  | 4%  |
| Other                      | 3%  | 4%   | 3%  | 3%  | 3%  | 4%  | 4%  | 5%  |

# MOST BOOKED VACATIONS WITHIN LAST THREE MONTHS

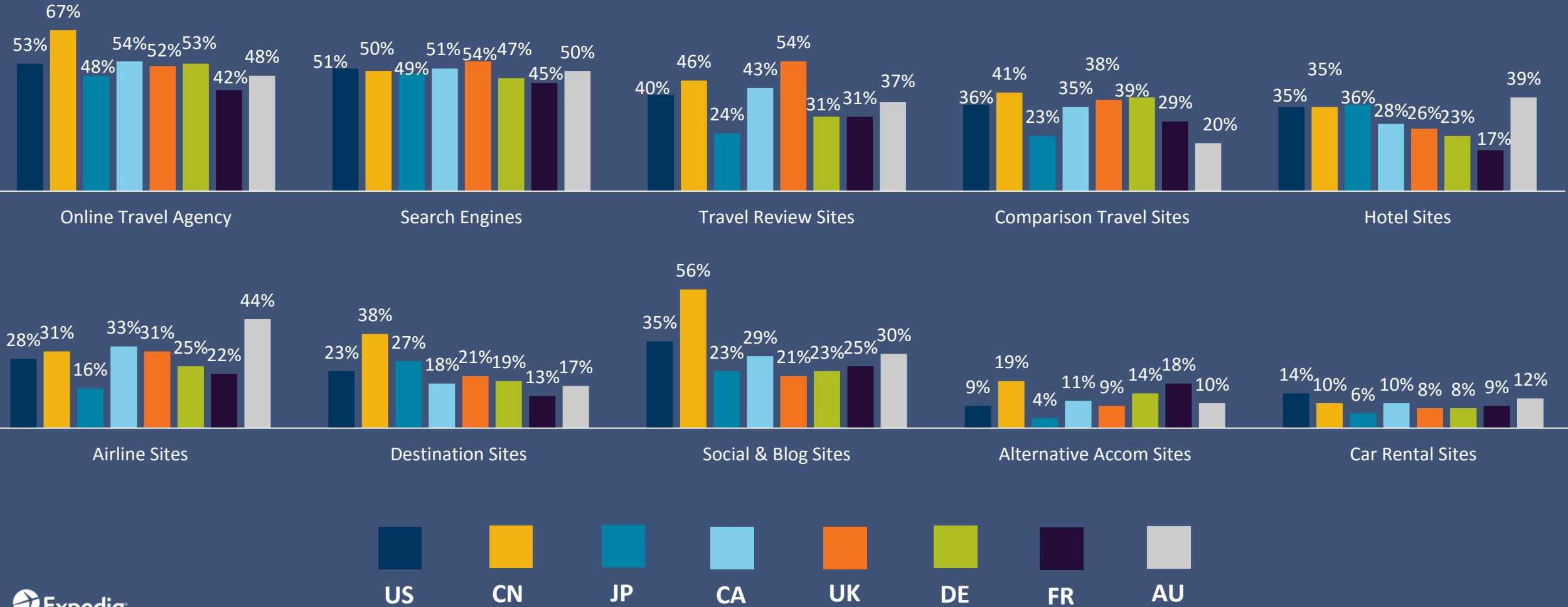
8 in 10 booked within the last six months



# OTAs & SEARCH ENGINES LEADING PLANNING RESOURCES

Destination sites and social media play an influential role

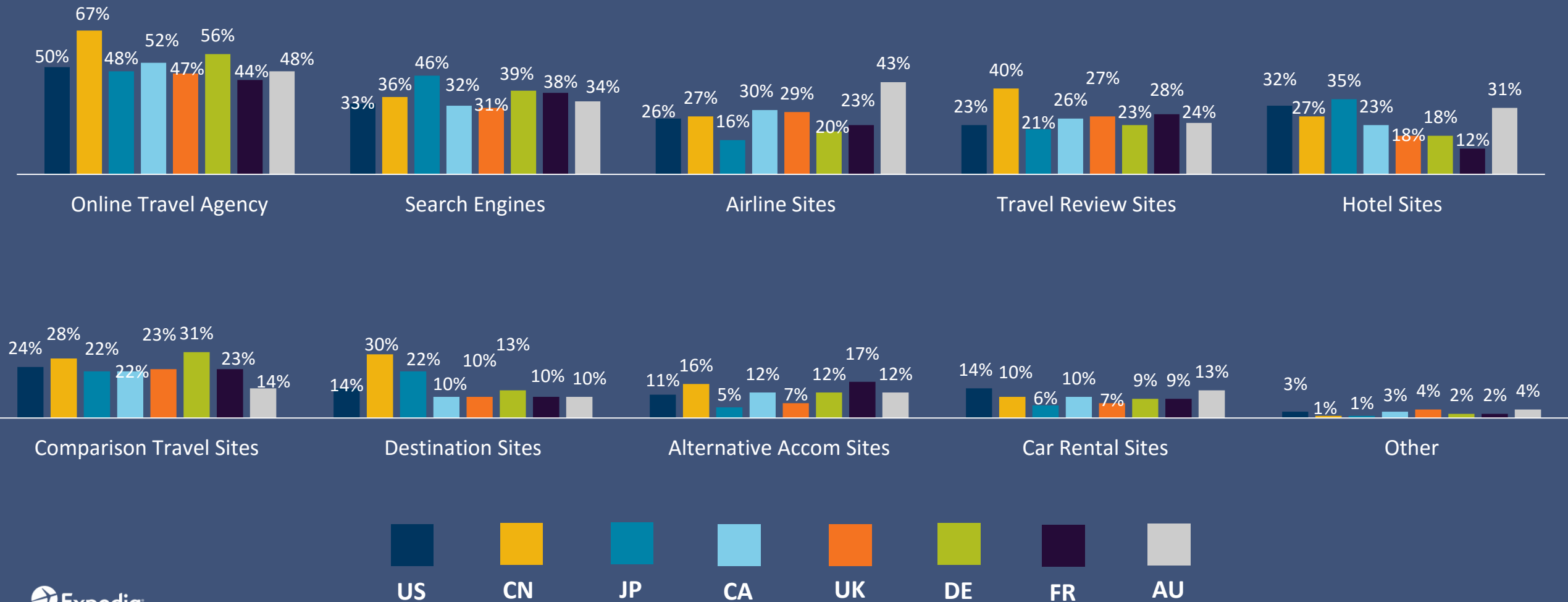
Resources Used For Planning Last Trip



# OTAs CONVERT THE MOST TRAVELERS

From inspiration to booking, OTAs prevalent throughout the purchase path

Sources Used To Book Travel Online On Last Trip



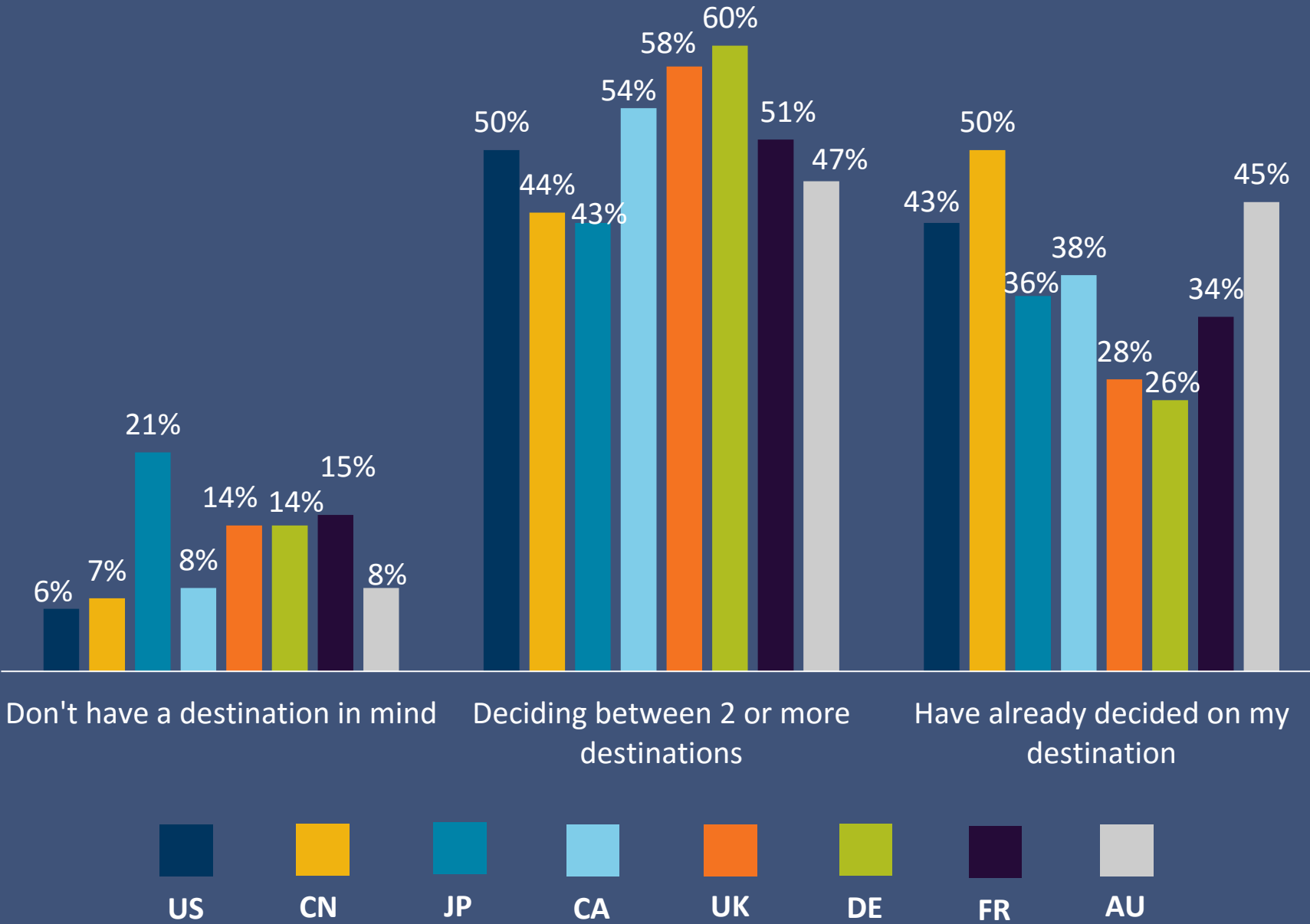


**TRAVELER  
ATTITUDES BY MARKET**

---

# TRAVELERS CAN BE DESTINATION INDECISIVE

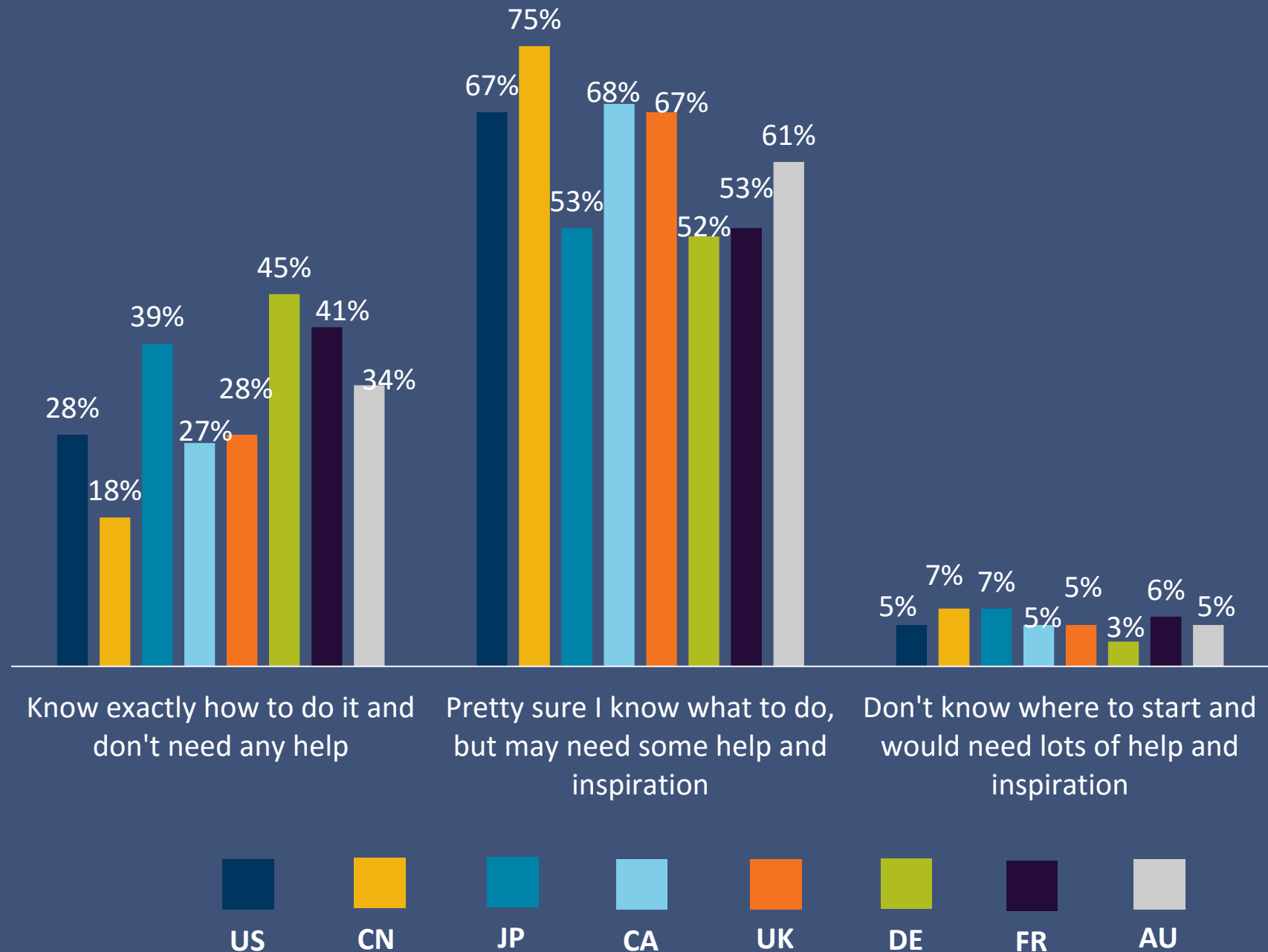
Japanese most likely to not have any destination in mind when first deciding to travel, while due to visa requirements Chinese likely have already decided on a destination





# AT LEAST HALF OF TRAVELERS OPEN TO DESTINATION INSPIRATION

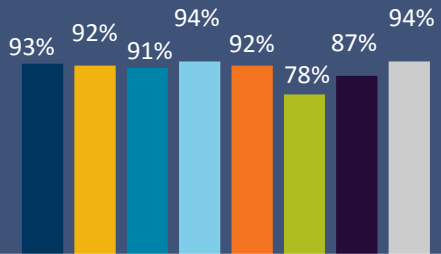
Chinese travelers especially are open to help and ideas, closely followed by Canadian, American, and British travelers



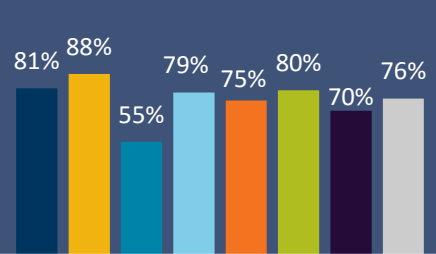
# VALUE & EXPLORATION DRIVE TRAVELER SENTIMENT

'You only live once' opportunities also rank high in consideration

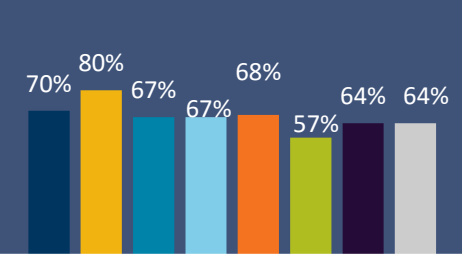
Percent of Travellers Who Somewhat Agree/Strongly Agree With The Statement



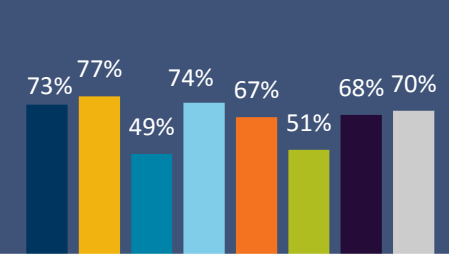
I look for the best deals and most value for my dollar



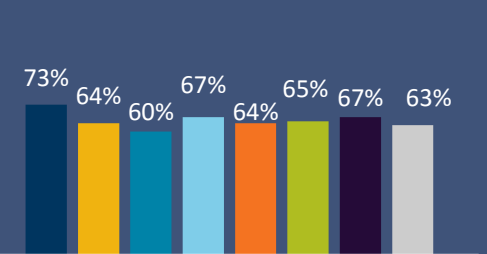
I'll go anywhere that allows me to explore the outdoors and be active



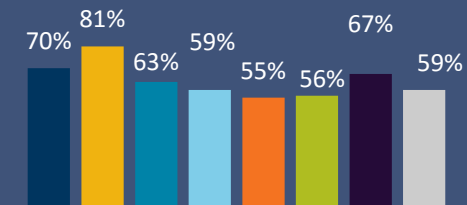
I prefer to go to museums, historical sites and arts & culture fill up my travel itinerary



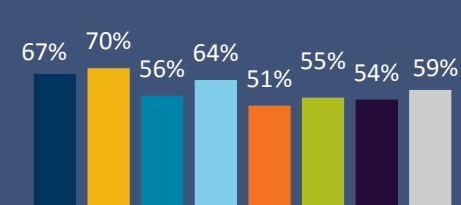
You only live once, so taking risks and crossing things off my list is imperative



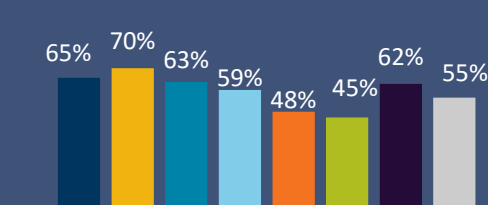
I often opt for "off the beaten path" locations and/or recommendations from locals



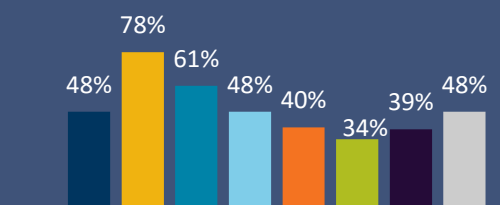
Every vacation is family oriented and has a specific focus on what will keep my family entertained and happy



I prefer all-inclusive vacations like resorts and cruises where I don't have to worry about a thing



I'm all about taking a nap on the beach, I plan all my travel around where and what I eat and drink



I don't like travelling far, as long as I'm not at work, I'm on vacation



US



CN



JP



CA



UK



DE



FR



AU

# WHEN PRIORITIZING, ACTIVITIES & UNIQUE EXPERIENCES DRIVE TRAVEL DECISIONS

Price and deals still important, but  
fall out of top three influences

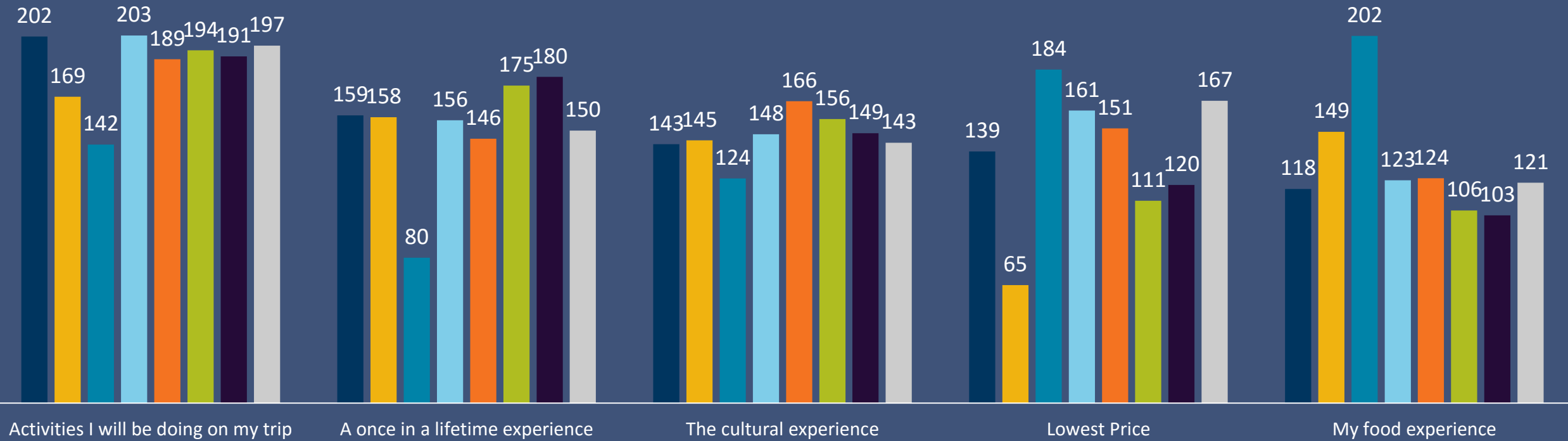


Notable Difference

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=8006)

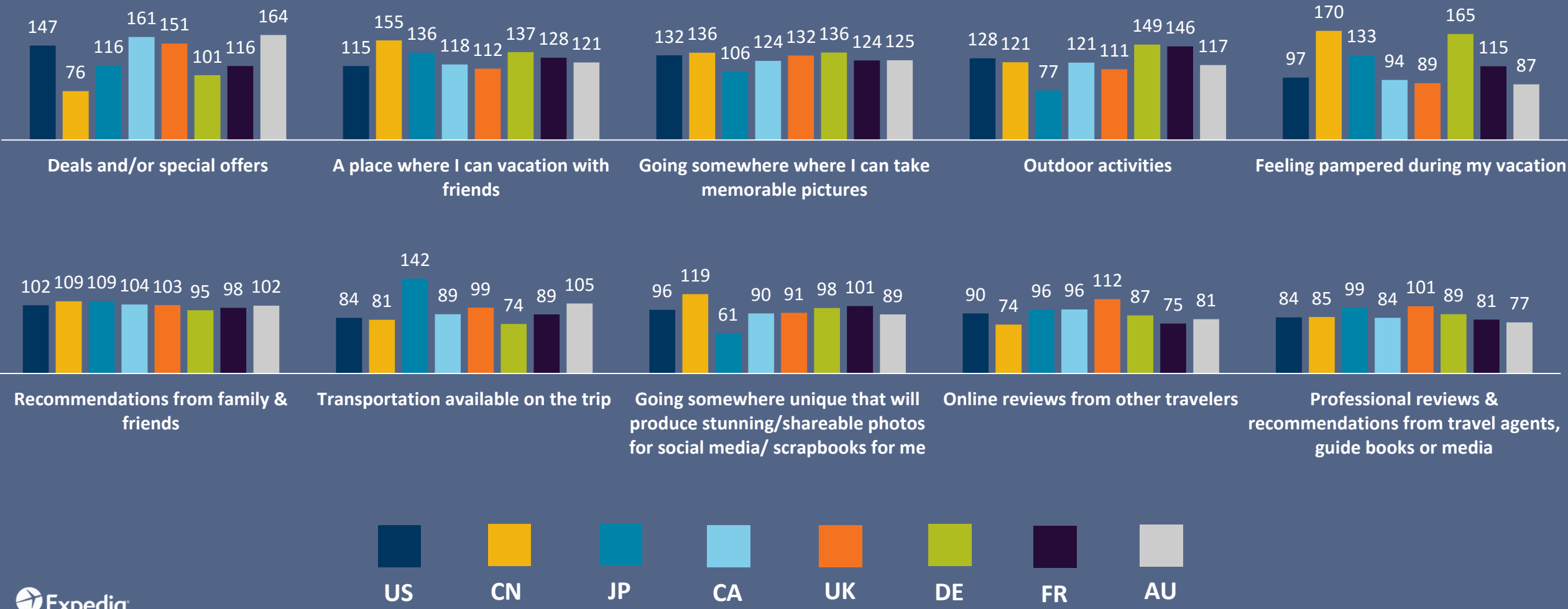
# ACTIVITIES & EXPERIENCES INFLUENCE DECISIONS

Japanese travelers value pricing and culinary experiences



# TRIP INFLUENCES CAN VARY BY COUNTRY

Chinese and Germans want to feel pampered, Japanese want transportation options



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=8006)

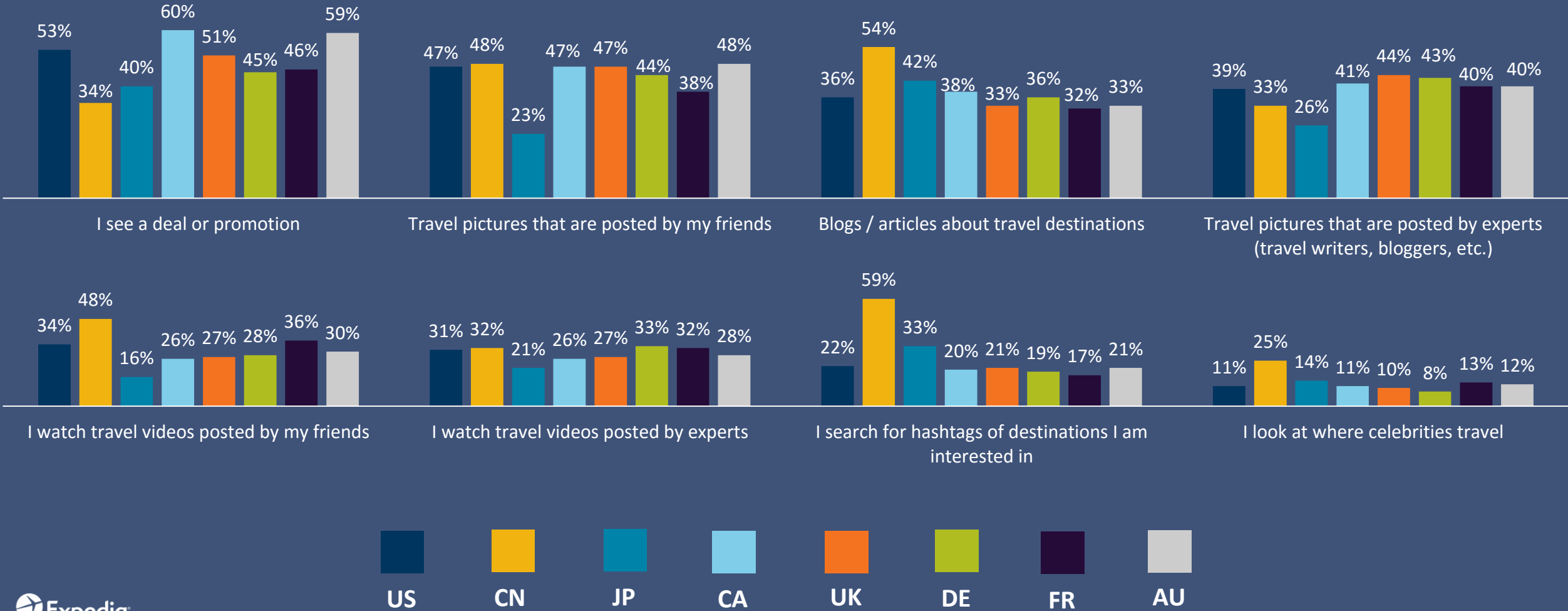


**INFLUENCERS AND KEY CONNECTION  
POINTS FOR TRAVELERS**

---

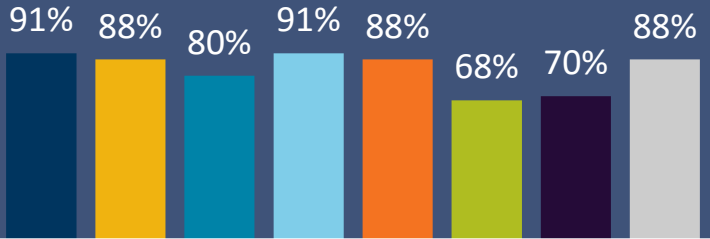
# PROMOTIONAL MESSAGING ON SOCIAL DRIVES DECISIONS

Imagery and content also highly inspirational and influential

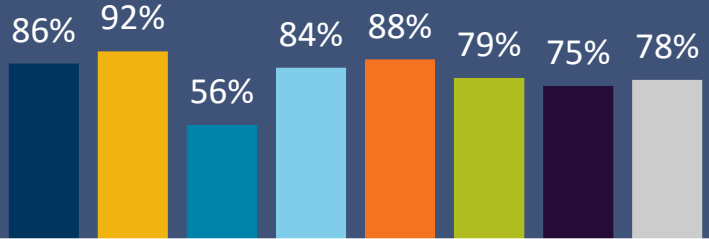


# DEALS & REVIEWS CAN HELP TRAVELERS CONVERT

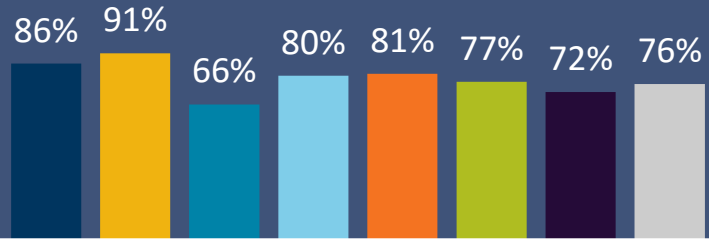
Destination content closely follows in influencing travelers



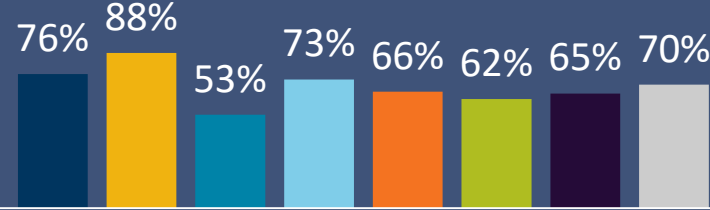
I look for deals before making a decision



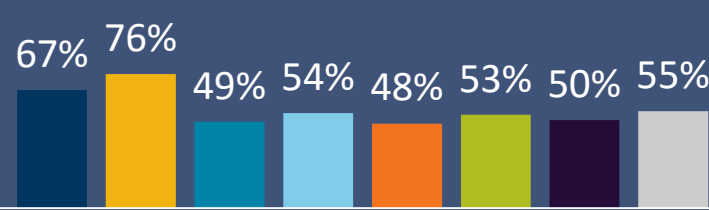
I read reviews of places I want to visit from sites like TripAdvisor before making my final decision



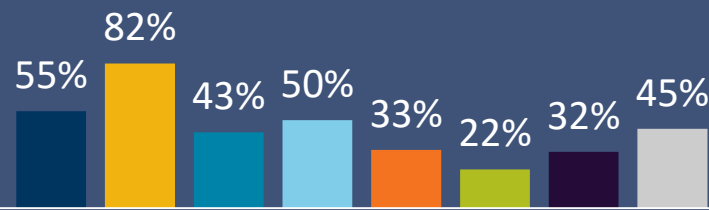
Informative content from destinations and/or travel brands can influence my decision making process



I talk to people who have visited the place before making a decision



Ads can be influential in my decision making process



I use loyalty programs in my decision making process

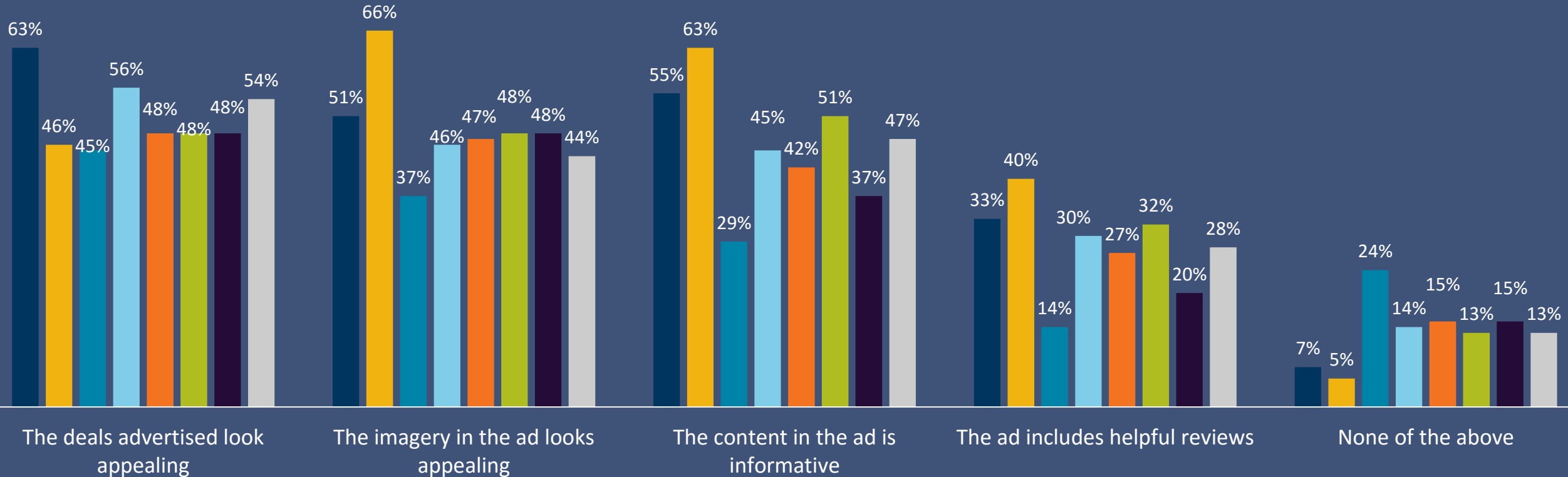


Q32. Please select to what extent you agree with the following statements. (Please select one for each statement)  
 Total (n=8006) UK (n=1001) Germany (n=1000) France (n=1002) China (n=1000) Japan (n=1001) Australia (n=1000) Canada (n=1001) US (n=1001)



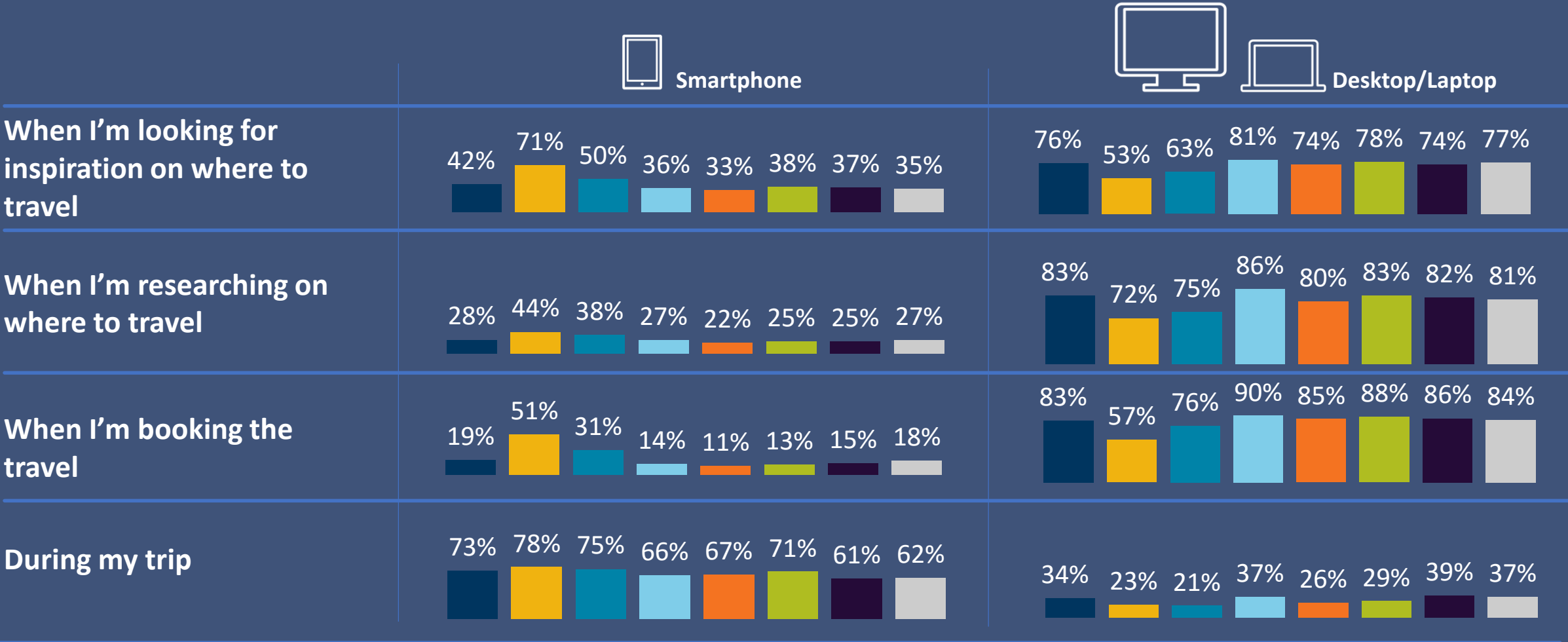
# EFFECTIVE ADVERTISING FEATURES IMAGERY, INFORMATIVE CONTENT, RELEVANT DEALS

Chinese and Americans are particularly influenced by ads with appealing imagery



# DESKTOPS DOMINATE THE PATH, SMARTPHONES IN TRIP

Chinese and Japanese most likely to use smartphone at all stages



Q47. For each of the following statements, which device(s) do you use? Please select all that apply. Total (n=8006) UK (n=1001) Germany (n=1000) France (n=1002) China (n=1000) Japan (n=1001) Australia (n=1000) Canada (n=1001) US (n=1001)

# KEY INSIGHTS & MARKETING TAKEAWAYS

Travelers from different countries have varying trip preferences and influences that impact their purchases

Target travelers with messaging and imagery tailored to their travel priorities and interests

Budgets, deals and value are considerations for all travellers, but activities and experiences get to the heart of travel decisions

Lead with unique activities and experiences – while providing deals to make the decision even easier

Travelers are undecided on a destination, and seeking content and information from a variety of online sources on multiple devices

Create a multi-platform strategy to reach and influence travelers through relevant content throughout the purchase journey

**THANK YOU**

[www.advertising.expedia.com](http://www.advertising.expedia.com)