MULTI-NATIONAL TRAVEL TRENDS

A Global Look at the Motivations and Behaviors of Travelers

expedia group^{**} media solutions

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

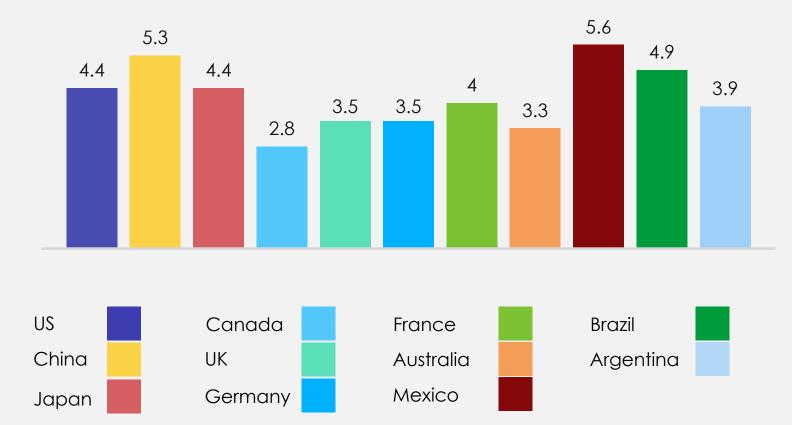
Mexico: n=1000 Brazil: n=1001 Argentina: n=1001



HOW TRAVELERS TRAVEL

NUMBER OF TRIPS VARY WIDELY BY COUNTRY

Mexican and Chinese travelers take the most trips, while Canadian travelers take the fewest



Expedia Group Media Solutions - Multi-National Travel Trends Q9: Typically, how many personal/leisure and business trips do you take per year? Total (n=11,008)

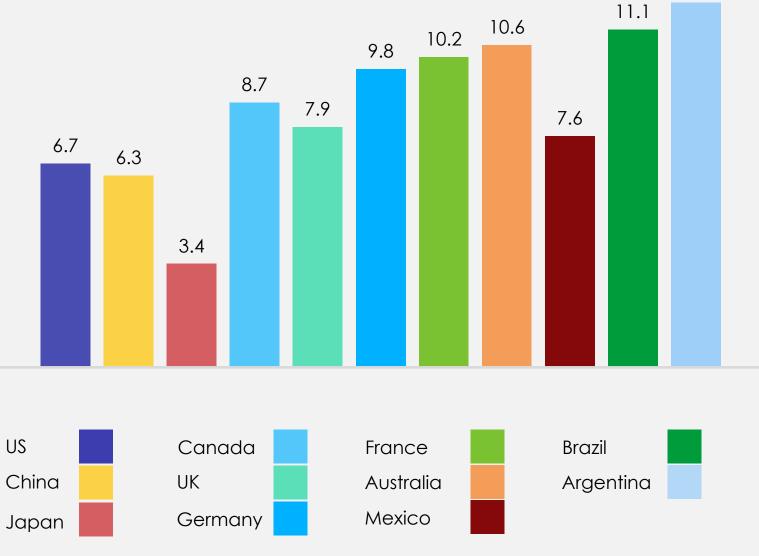




NOT ALL VACATIONS ARE CREATED EQUAL

Argentinian travelers take the longest vacations on average, while Japanese travelers take the shortest



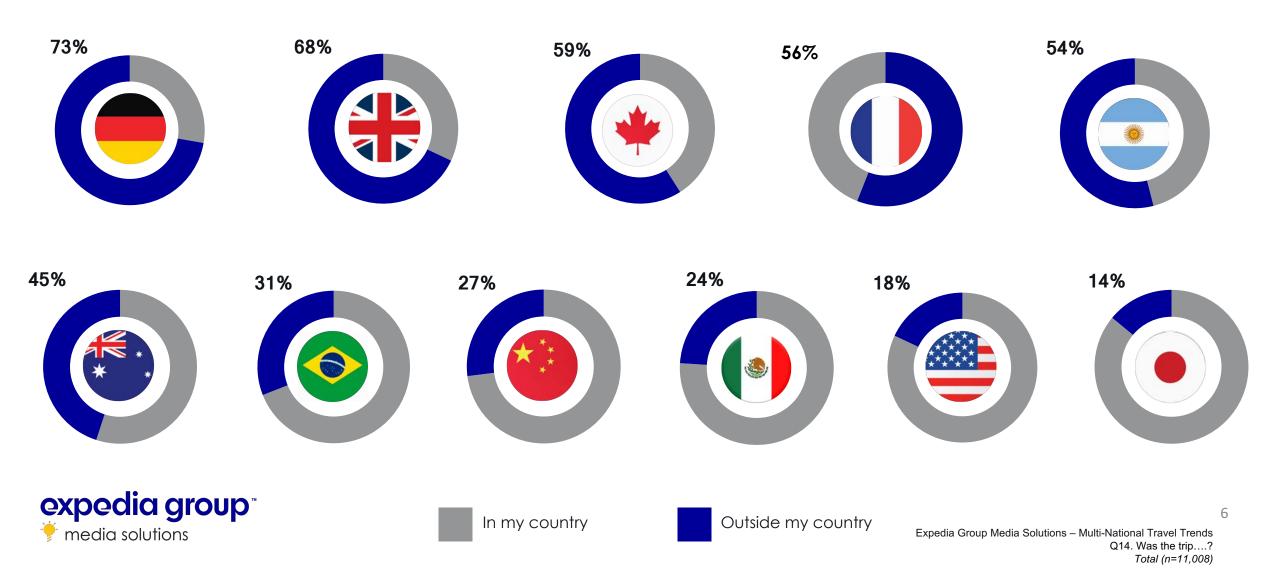


Expedia Group Media Solutions – Multi-National Travel Trends Q15. How long was your vacation? *Total (n=11,008)*

12.0

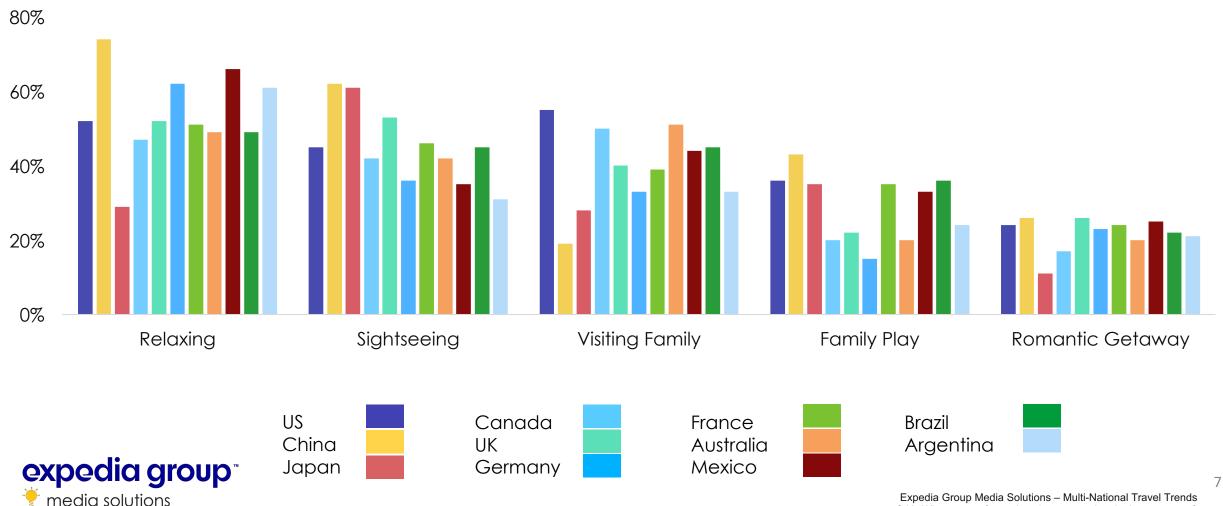
INTERNATIONAL OR DOMESTIC

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



RELAXING & SIGHTSEEING TRIPS RANK HIGH

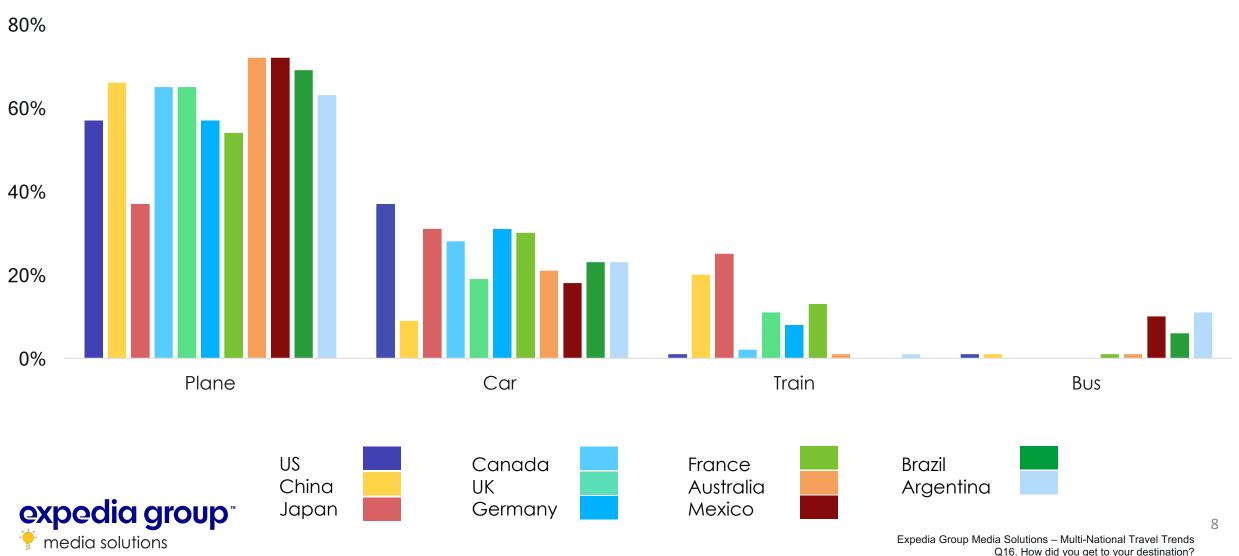
Visiting family is more important for Americans, Canadians and Australians



Expedia Group Media Solutions – Multi-National Travel Trends Q10: What types of vacations have you taken in the **past year**? *Total (n=11,008)*

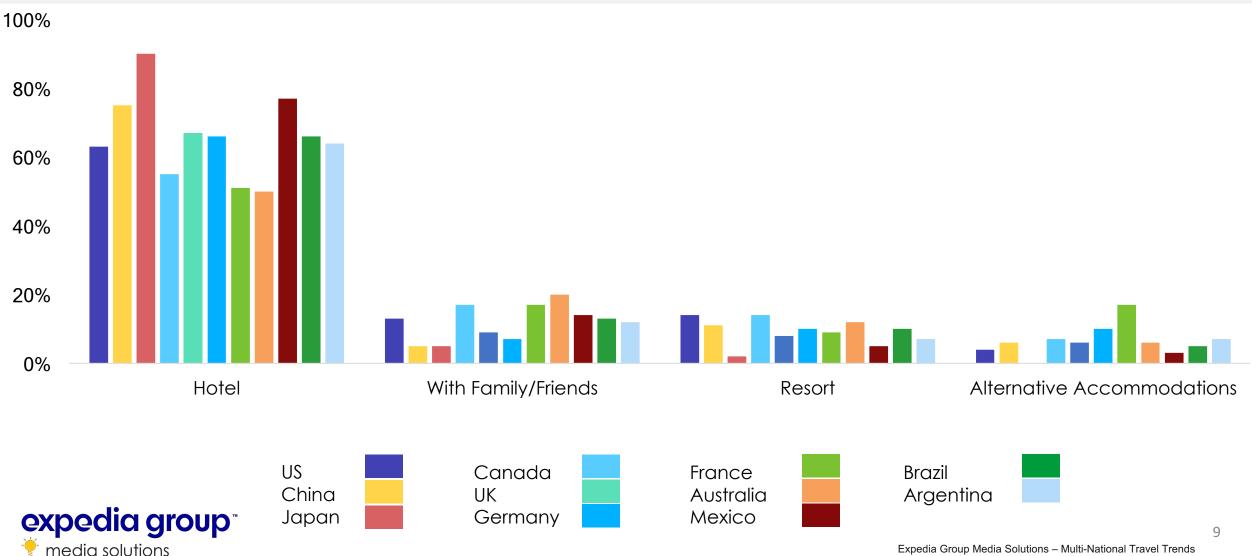
PLANES, TRAINS, AND AUTOMOBILES

Travelers largely travel by plane; Chinese travelers choose trains over cars



HOTELS ARE THE PLACE TO STAY

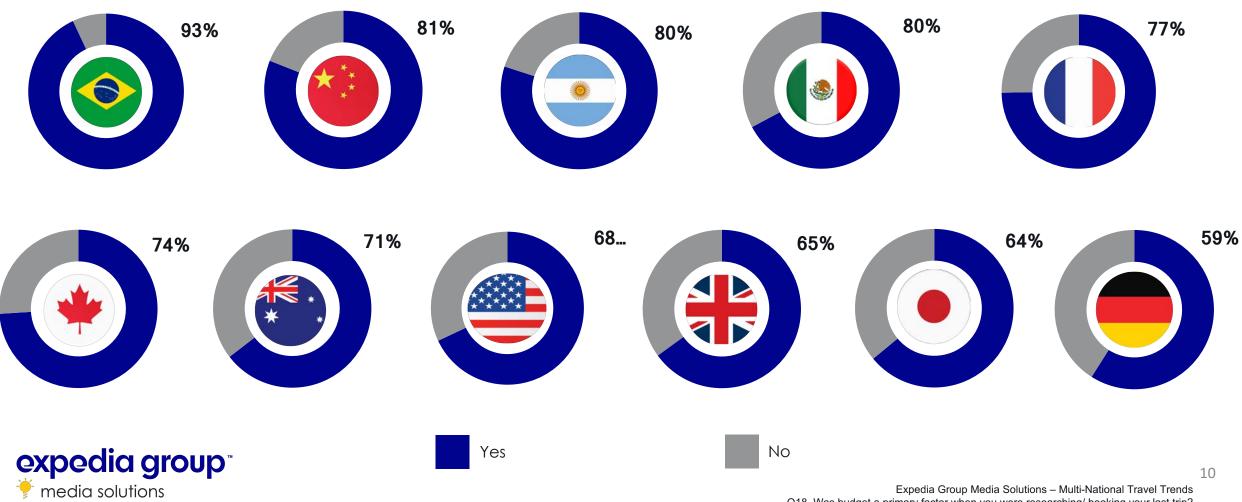
French travelers are more likely to pick alternative accommodations



Dia Group Media Solutions – Multi-National Travel Trends 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



HOW TRAVELERS SPEND

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

		★** **		*				* *			
Hotel	27%	18%	34%	25%	31%	31%	23%	23%	24%	23%	24%
Flight	20%	15%	14%	24%	20%	17%	18%	25%	20%	20%	22%
Food	17%	16%	18%	17%	16%	16%	16%	16%	18%	18%	17%
Transportation	10%	11%	14%	10%	10%	8%	12%	9 %	10%	11%	11%
Attractions/Tours	11%	15%	6%	9 %	10%	10%	11%	9 %	11%	12%	9 %
Shopping	8%	16%	11%	9 %	7%	8%	9 %	9 %	11%	12%	12%
Alternative Accommodations	4%	5%	1%	3%	3%	6%	7%	4%	4%	4%	4%
Other	3%	4%	3%	3%	3%	4%	4%	5%	2%	3%	3%



Expedia Group Media Solutions – Multi-National Travel Trends Q20. What proportion of your travel budget did you spend on each of the following? *Total (n=11,008)*

11

OTAS & SEARCH ENGINES TOP FOR PLANNING

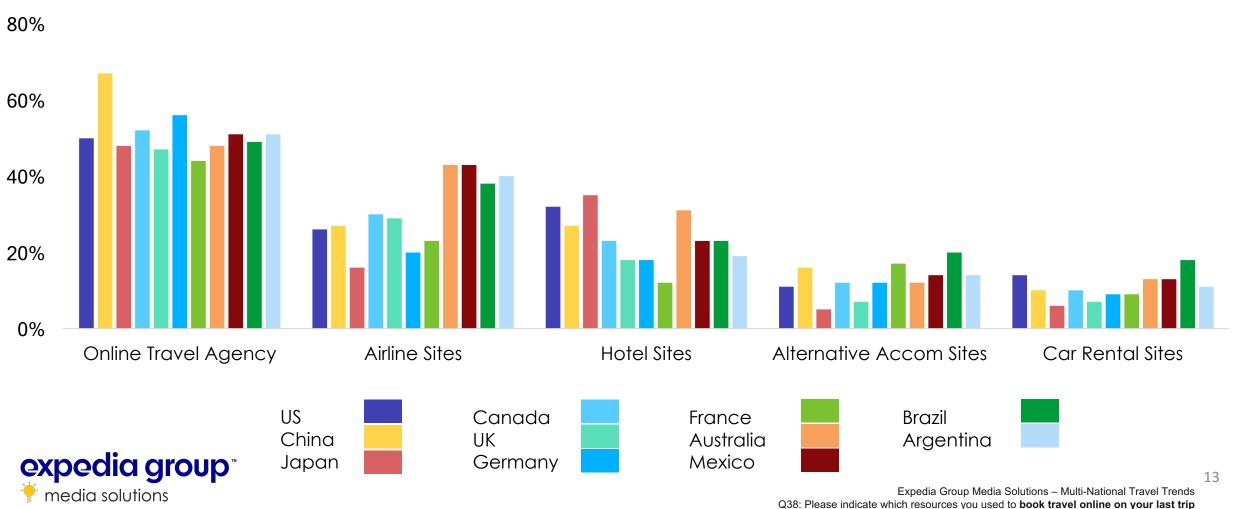
Travel review/comparison sites also ranked highly, while Chinese travelers preferred social and blog sites



ing 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

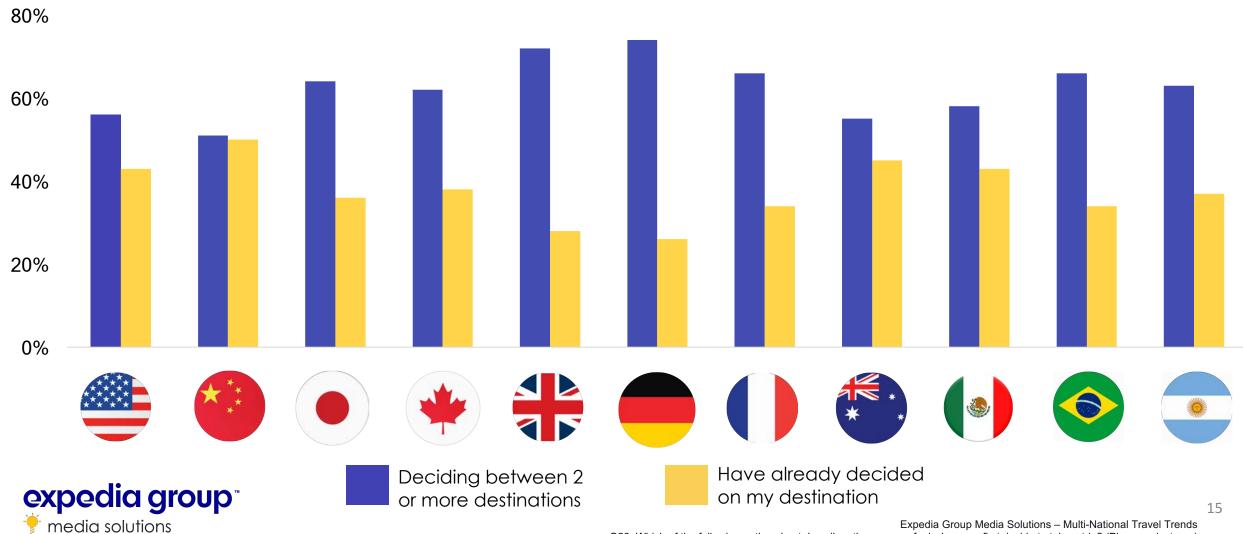


Total (n=11,008)

TRAVELER INSPIRATIONS & DECISIONS

SHOPPERS CONSIDER MULTIPLE DESTINATIONS

European travelers are least likely to have decided on a destination

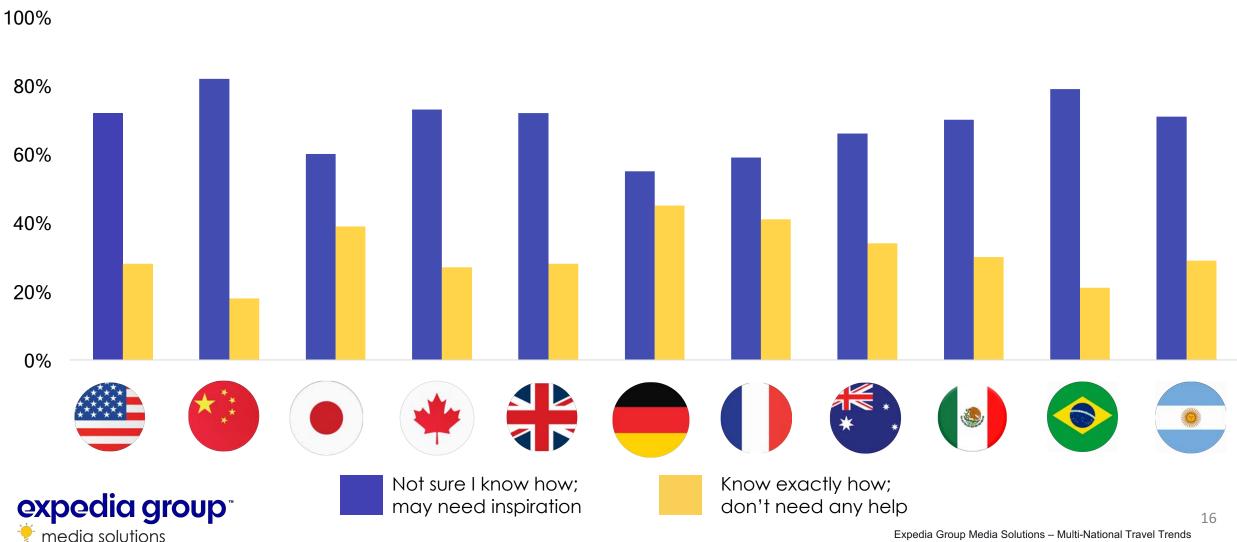


Q23. Which of the following options best describes the way you feel when you first decide to take a trip? (Please select one)

Total (n=11,008)

SHOPPERS SEEK VACATION INSPIRATION

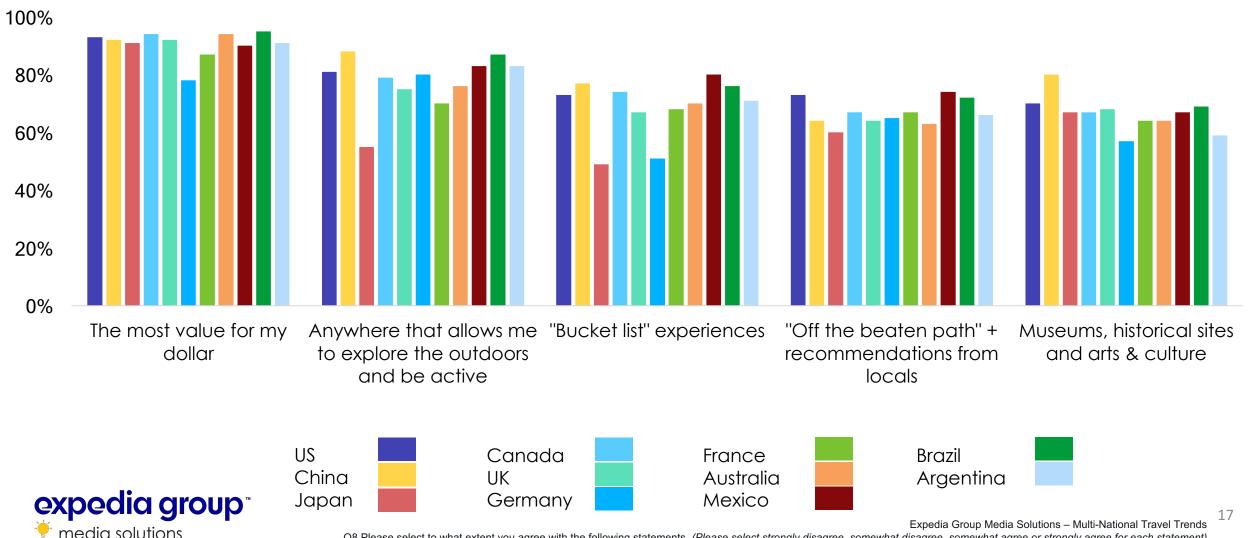
Most travelers are open to help and inspiration when planning a trip



Q24. Which of the following options best describes the way you feel when you **first start planning** a trip/holiday? 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) ACTIVITIES & EXPERIENCES DRIVE TRAVEL DECISIONS

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

Activities I will be doing on my trip			
A once in a lifetime experience		150	
The cultural experience		147	
Lowest price		137	
My food experience		131	
Deals and/or special offers		129	
A place where I can vacation with friends		128	
Going somewhere for memorable pictures		127	
Outdoor activities		121	
Feeling pampered during my vacation		119	
Recommendations from family & friends		103	
Transportation available on the trip		95	
Going somewhere unique for shareable photos		93	
Online reviews from other travelers	89		



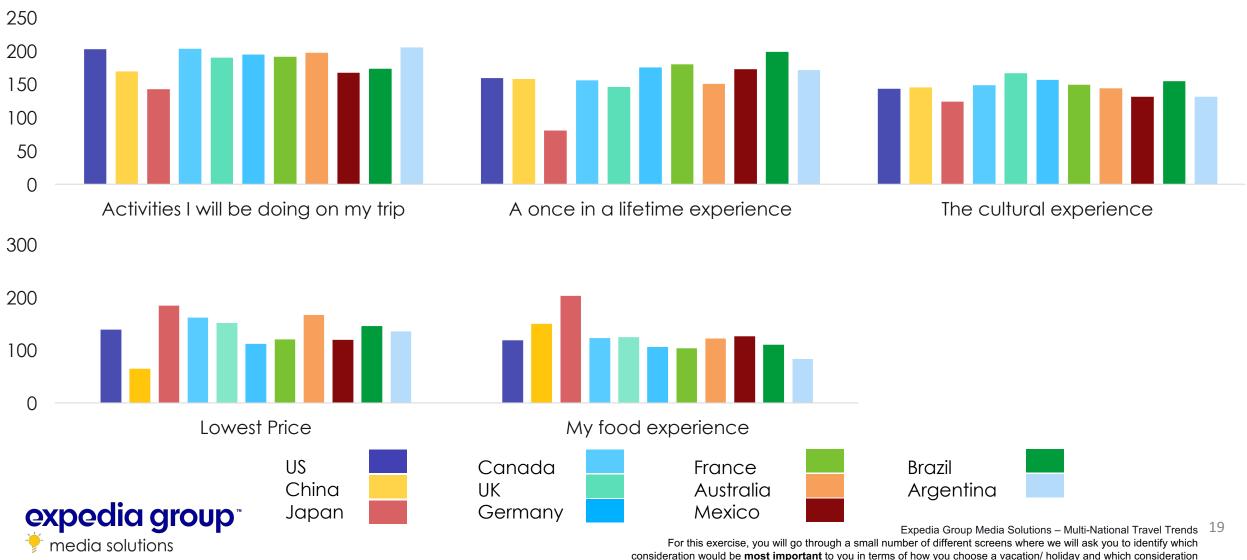
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For this exercise, you will go through a small number of different screens where we will ask you to identify which consideration would be <u>most important</u> to you in terms of how you choose a vacation/ holiday and which consideration would be <u>least</u> <u>important</u> 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

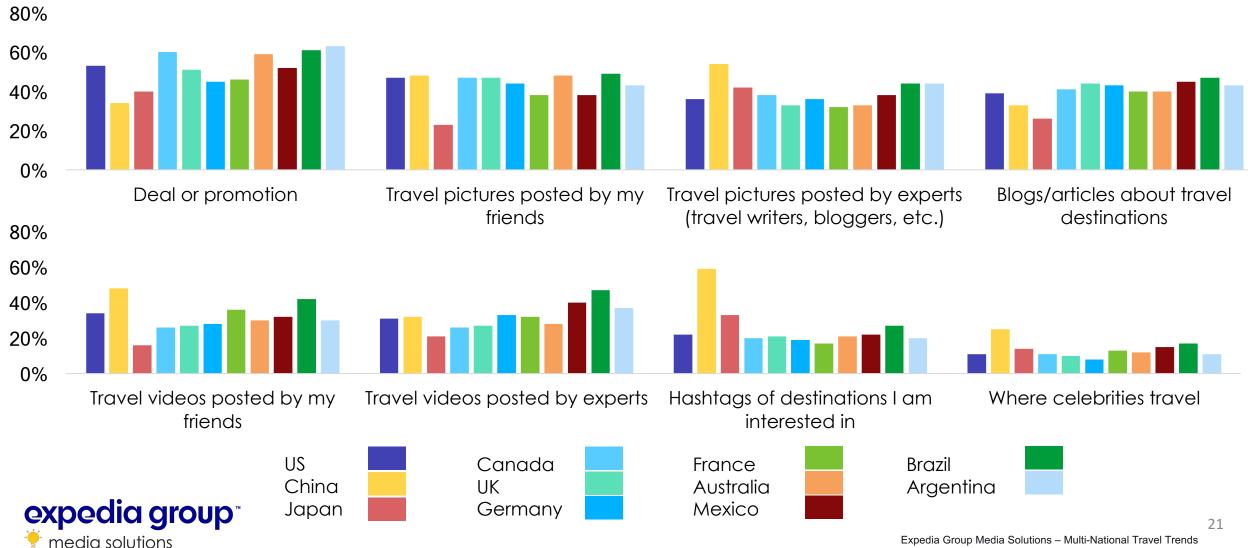


would be least important to you in terms of how you choose to purchase a vacation/holiday. Total (n=11,008)

INFLUENCES & KEY CONNECTION POINTS

SOCIAL MEDIA INFLUENCES TRAVEL DECISIONS

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

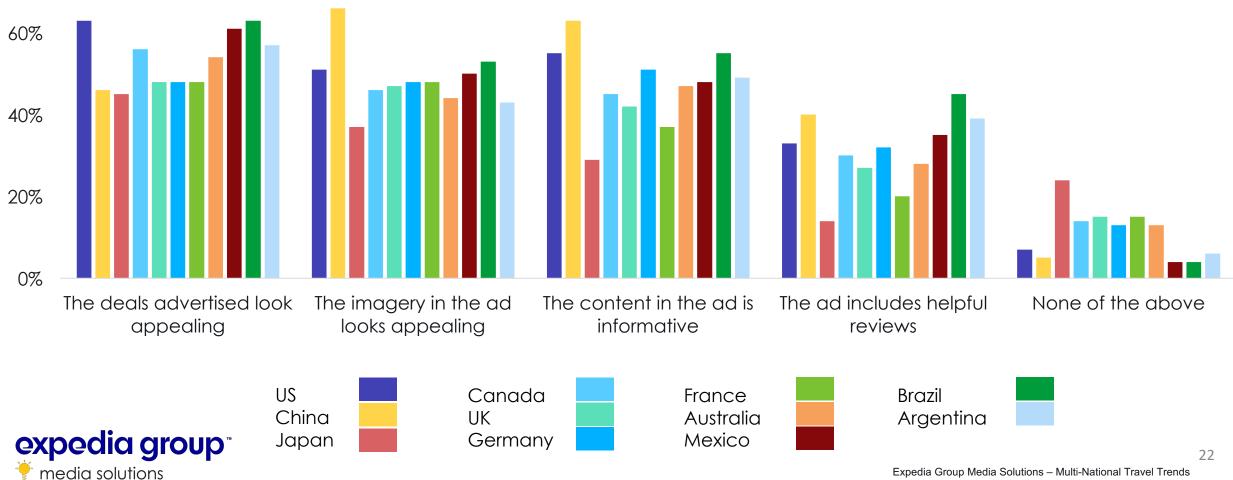


Q29. How does social media influence you? Which of the following influence your decision in booking a trip? *Total (n=11,008)*

ADS WIN WITH DEALS & STUNNING PICTURES

Chinese, American and Brazilian travelers are particularly influenced by ads with appealing imagery and informative content

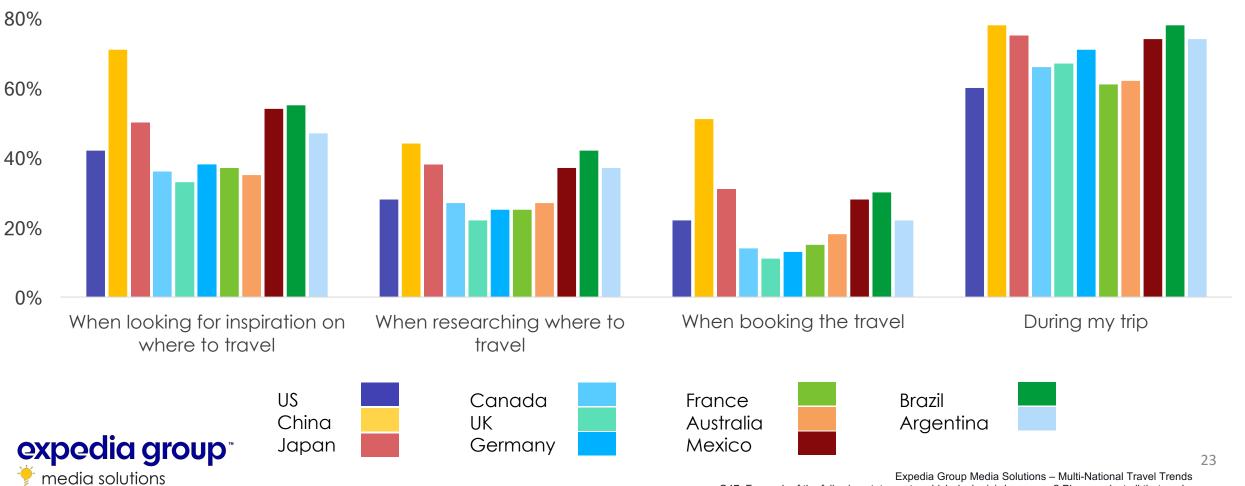
80%



Q33. How can ads help influence in your decision making process? (Select all that apply) Total (n=11,008)

TRAVELERS USE MOBILE THROUGHOUT THE JOURNEY

Chinese and Latin American travelers are most likely to use smartphones at all stages



Q47. For each of the following statements, which device(s) do you use? Please select all that apply. *Total (n=11,008)*

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.



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.



Value does matter

Highlight your special deals; draw attention to the entire experience.



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.



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