

# MULTI-NATIONAL TRAVEL TRENDS

A Global Look at the Motivations and  
Behaviors of Travelers

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 media solutions

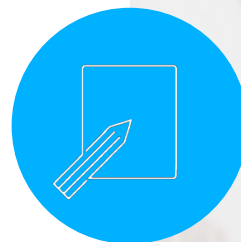
# METHODOLOGY

## ONLINE SURVEY



### Data Collection Method

Quantitative Survey



### Field Work

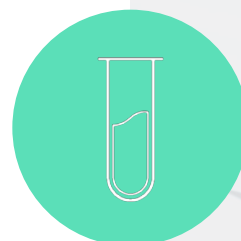
NA, APAC, EMEA: 30 March – 7 April 2017

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	Germany: n=1000	Mexico: n=1000
Canada: n=1001	Japan: n=1001	Brazil: n=1001
China: n=1000	UK: n=1001	Argentina: n=1001
France: n=1002	US: n=1001	



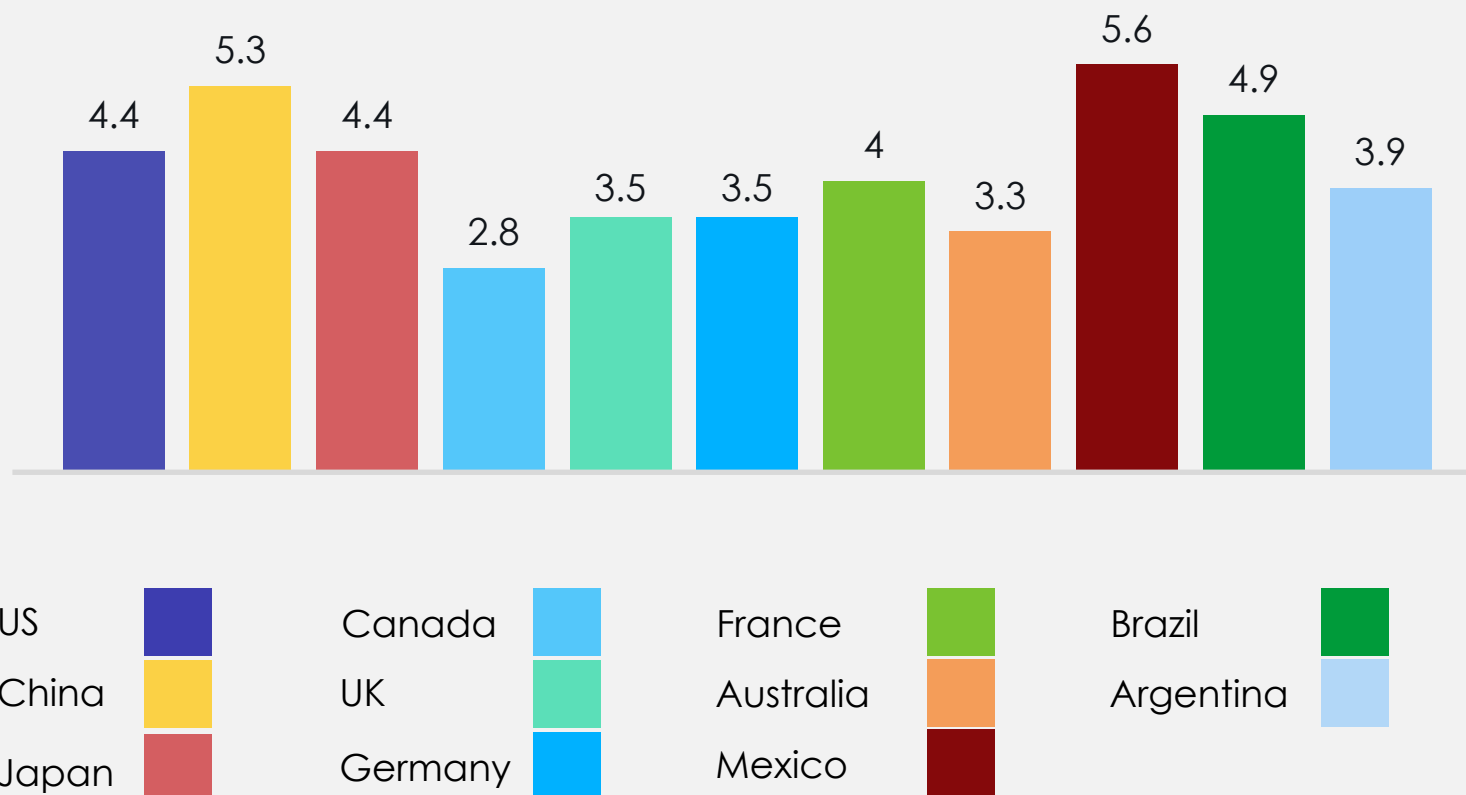


# HOW TRAVELERS TRAVEL



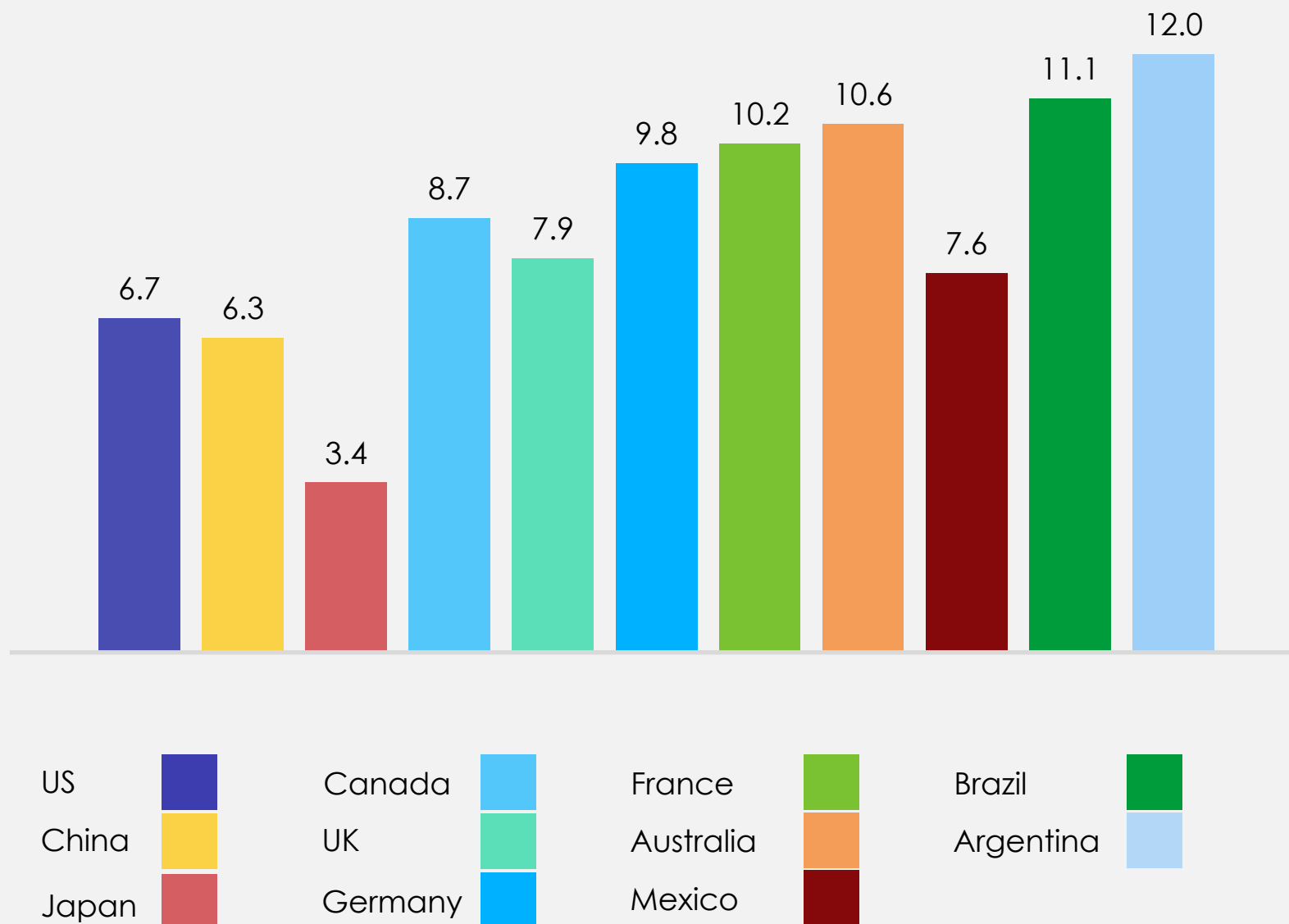
# NUMBER OF TRIPS VARY WIDELY BY COUNTRY

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



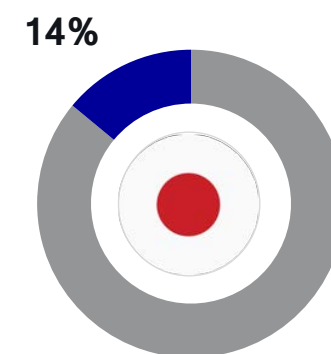
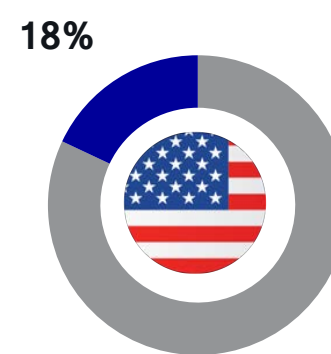
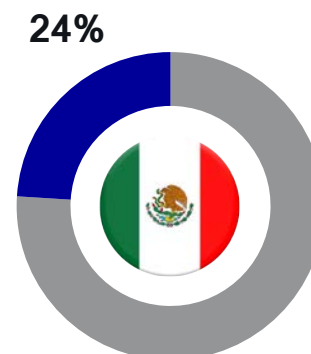
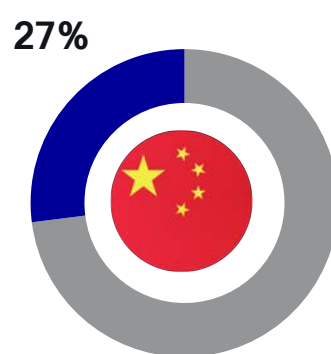
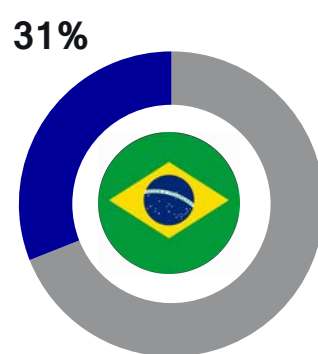
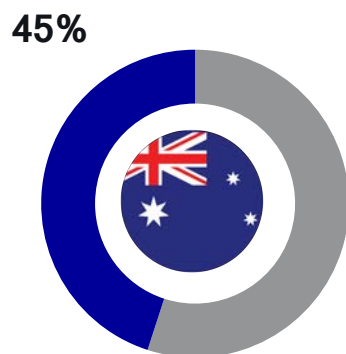
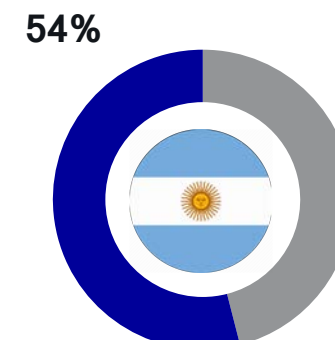
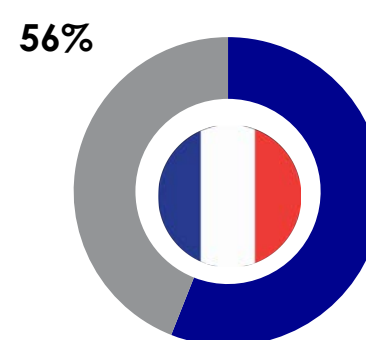
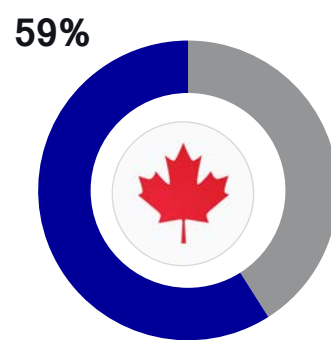
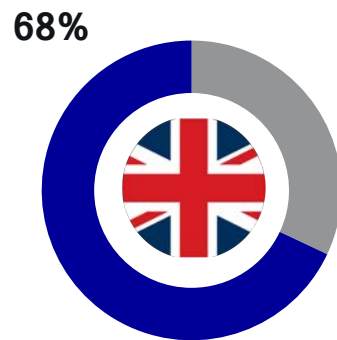
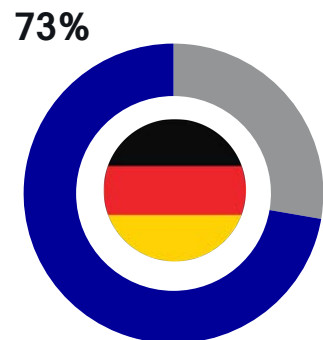
# NOT ALL VACATIONS ARE CREATED EQUAL

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



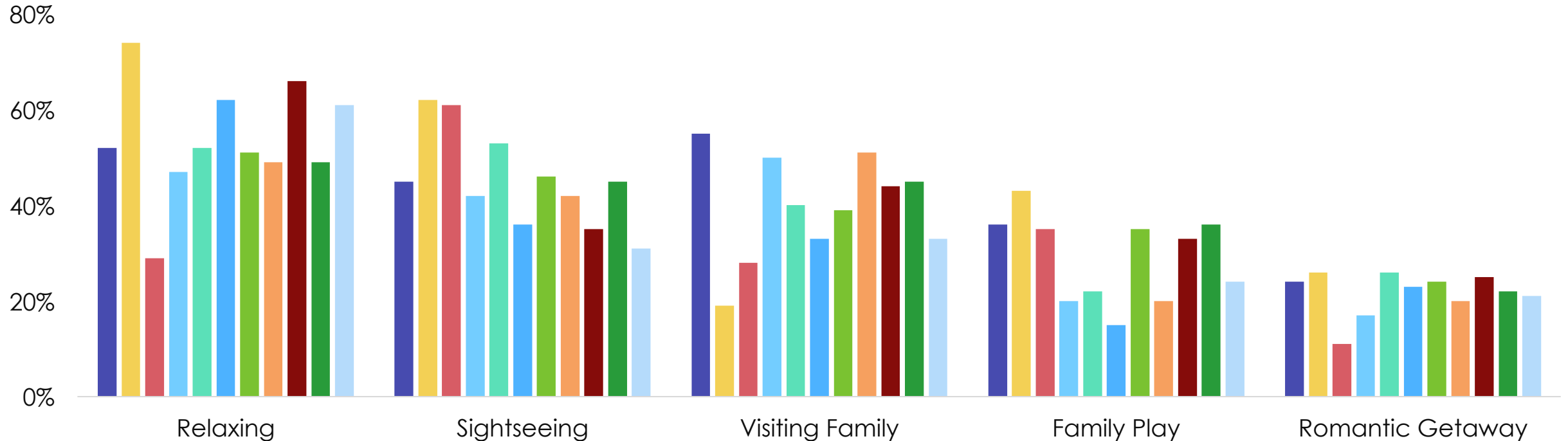
# INTERNATIONAL OR DOMESTIC

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



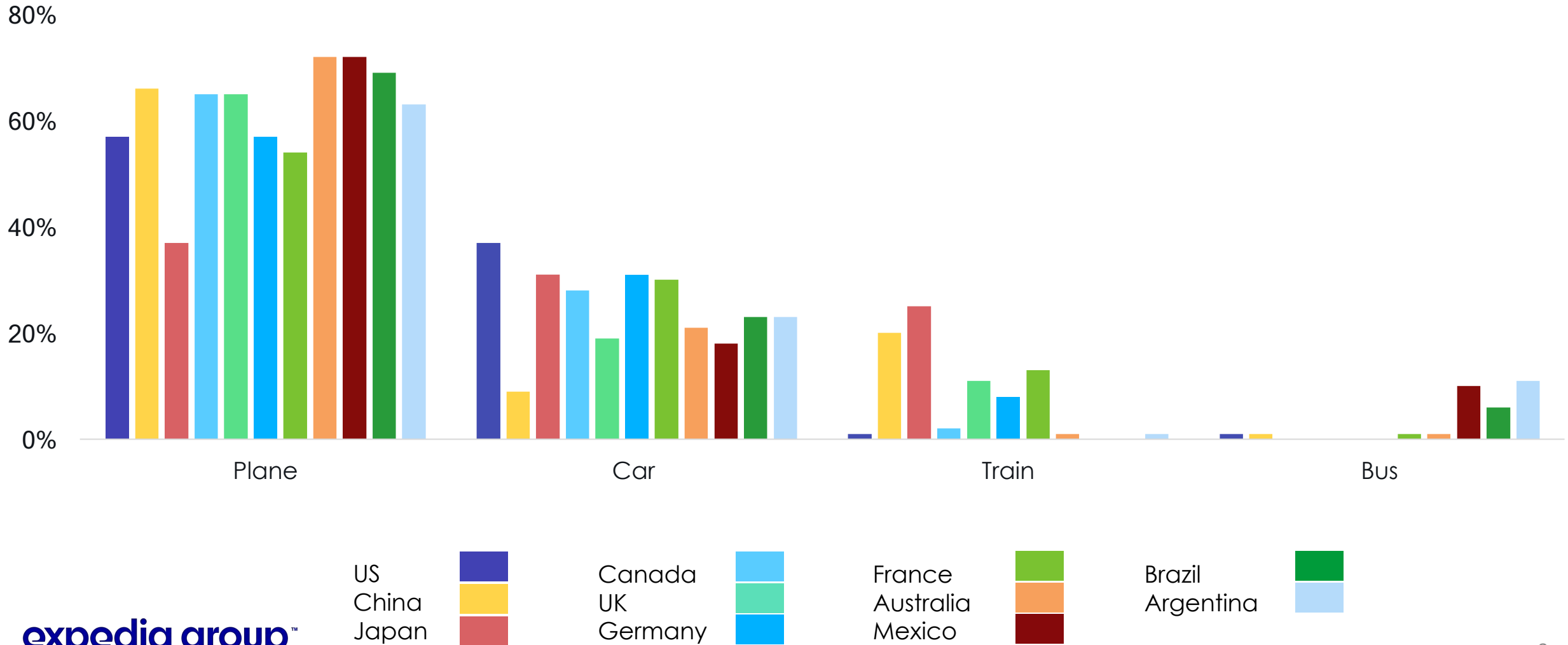
# RELAXING & SIGHTSEEING TRIPS RANK HIGH

Visiting family is more important for Americans, Canadians and Australians



# PLANES, TRAINS, AND AUTOMOBILES

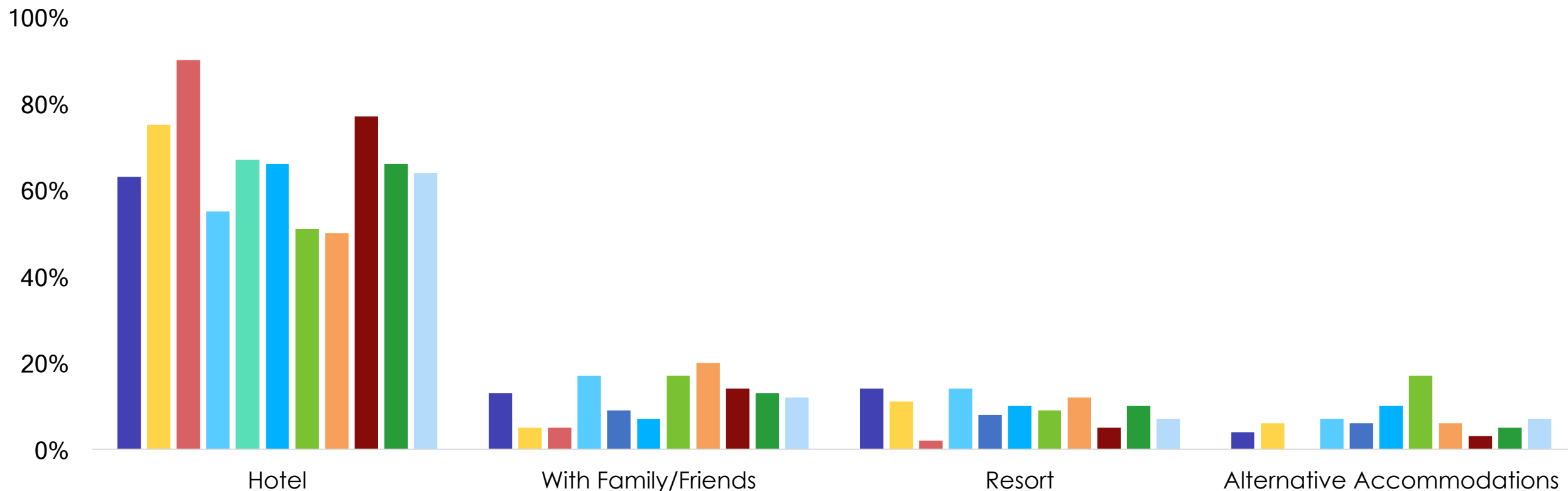
Travelers largely travel by plane; Chinese travelers choose trains over cars





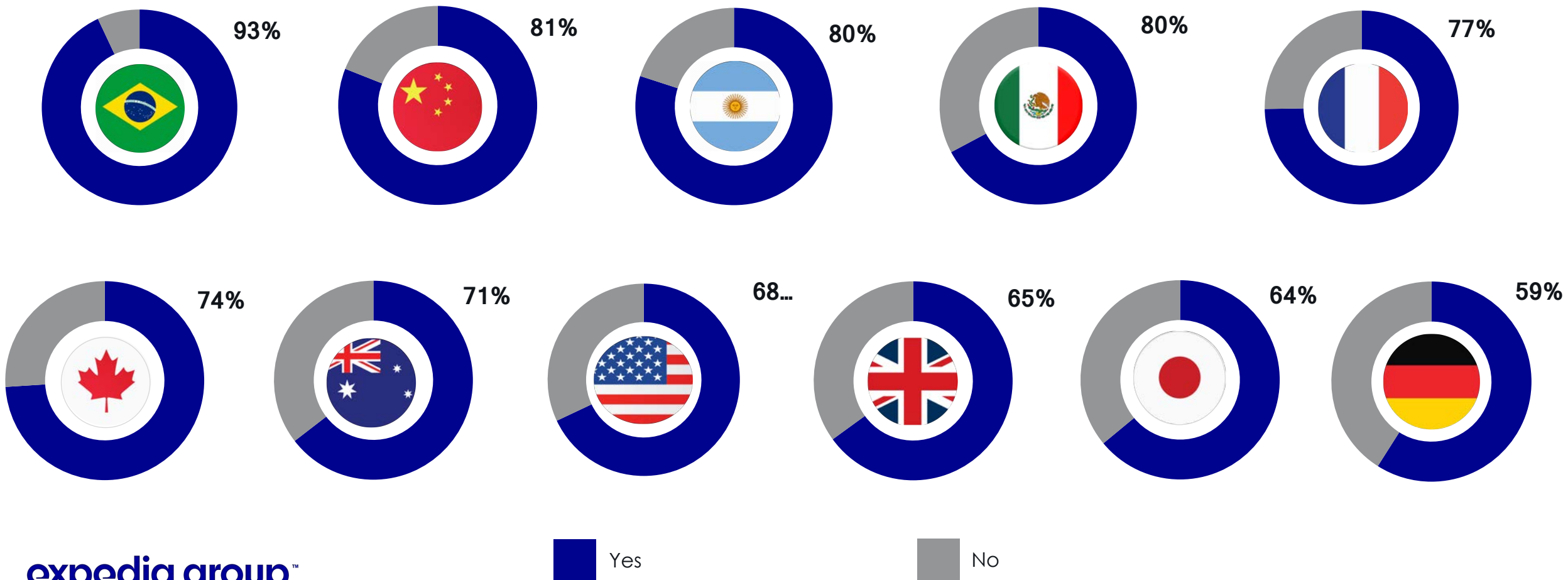
# HOTELS ARE THE PLACE TO STAY

French travelers are more likely to pick alternative accommodations














# 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%

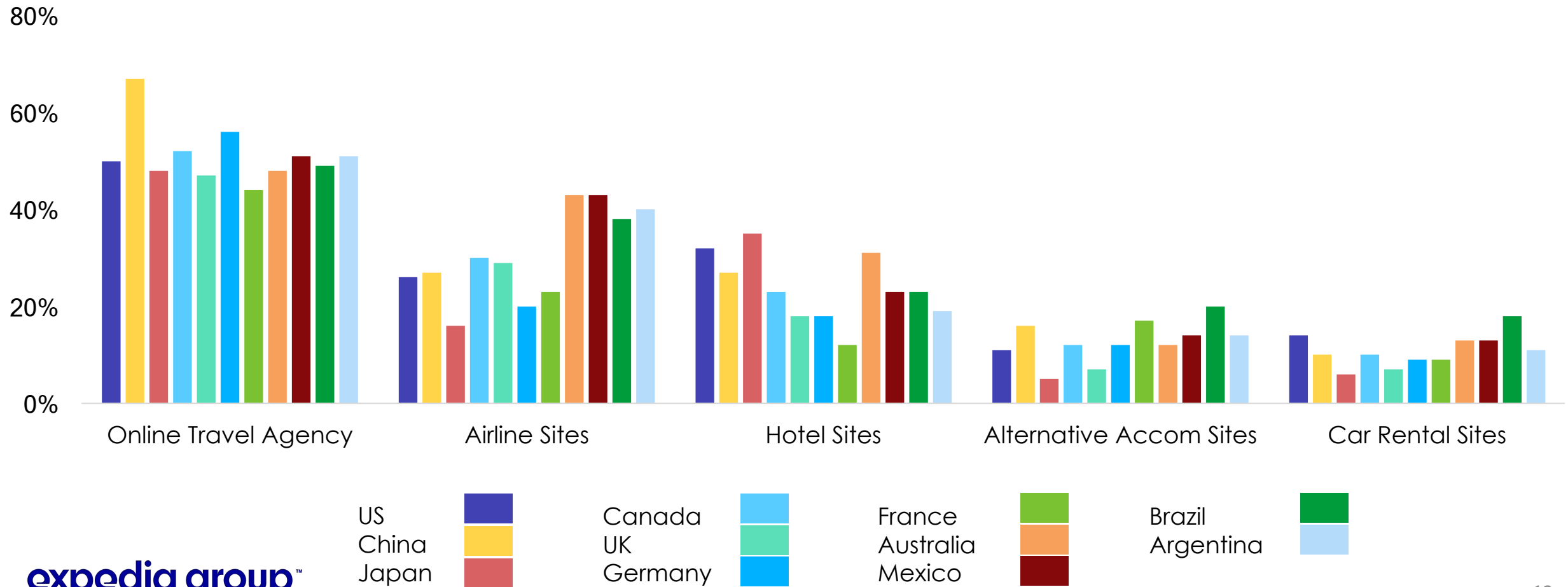
# OTAs & SEARCH ENGINES TOP FOR PLANNING

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



# OTAs CONVERT THE MOST TRAVELERS

Airline, hotel and other sites closely follow depending on where the traveler is from



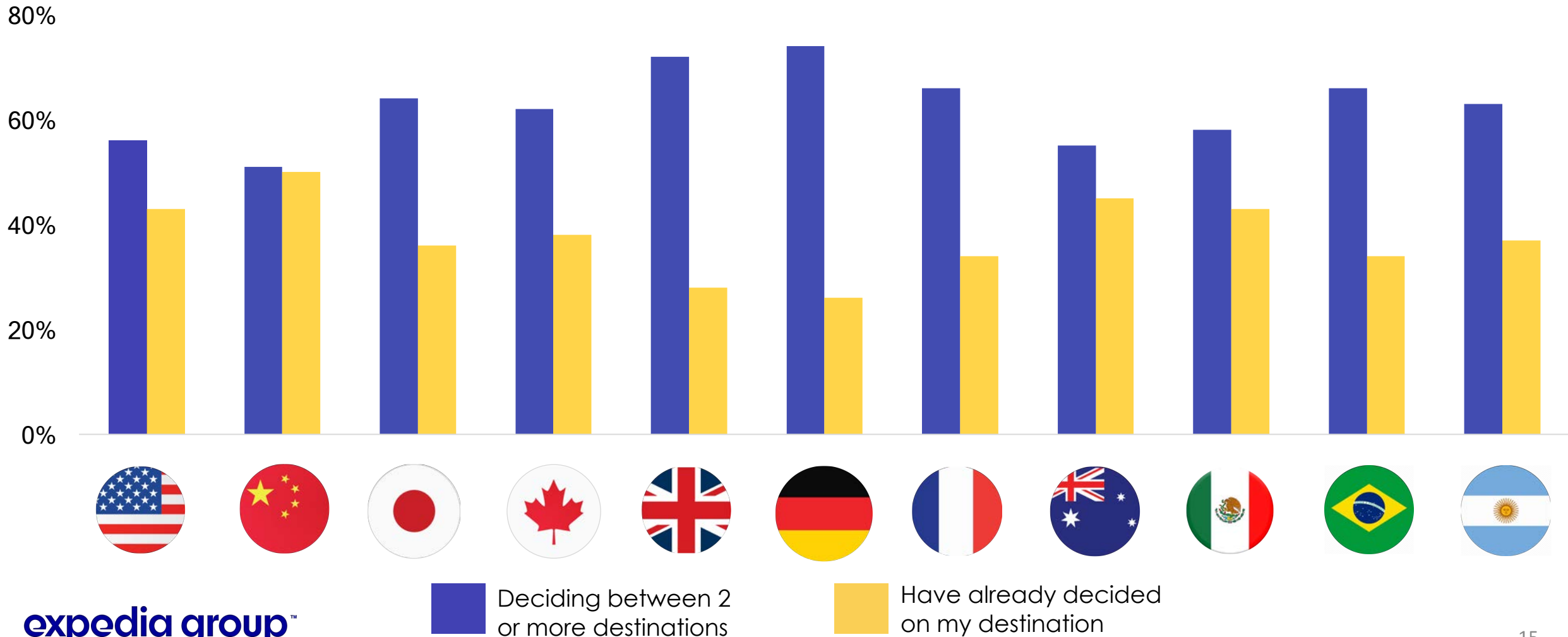




# TRAVELER INSPIRATIONS & DECISIONS

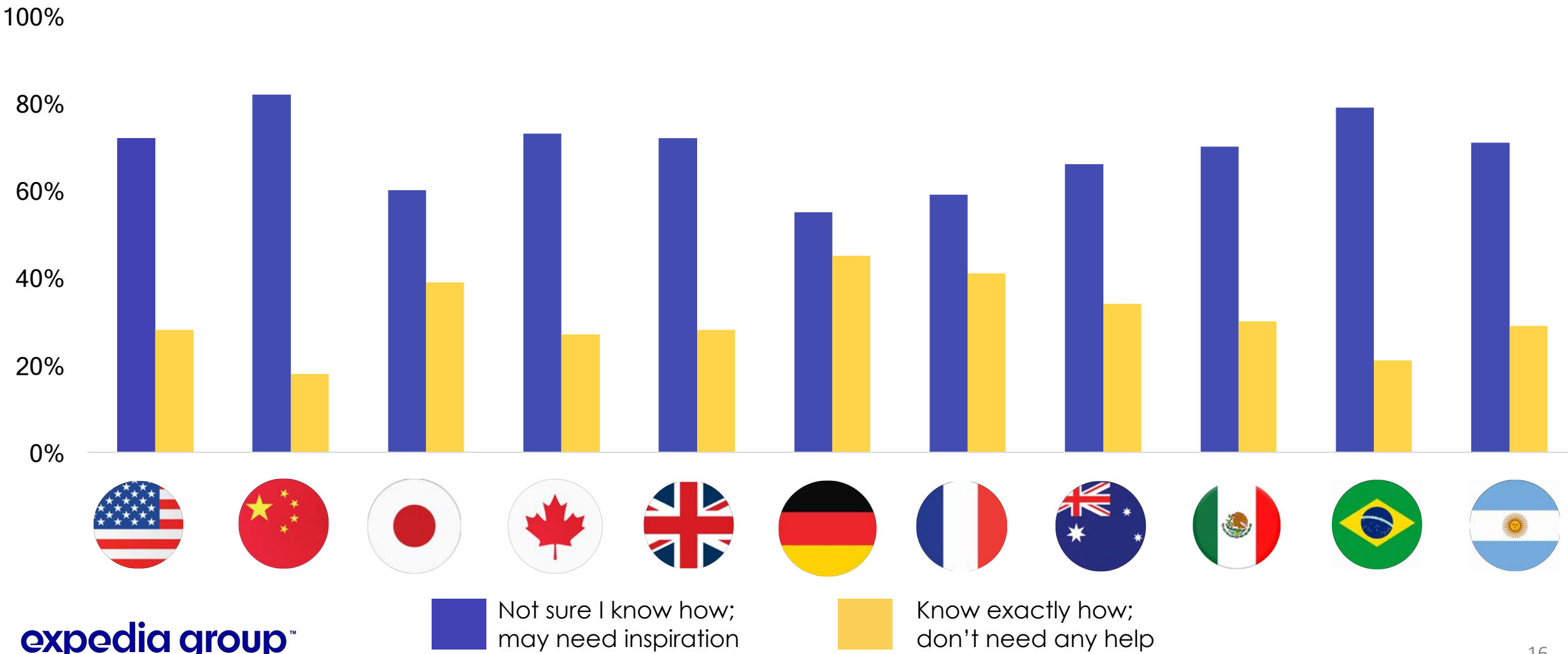
# SHOPPERS CONSIDER MULTIPLE DESTINATIONS

European travelers are least likely to have decided on a destination



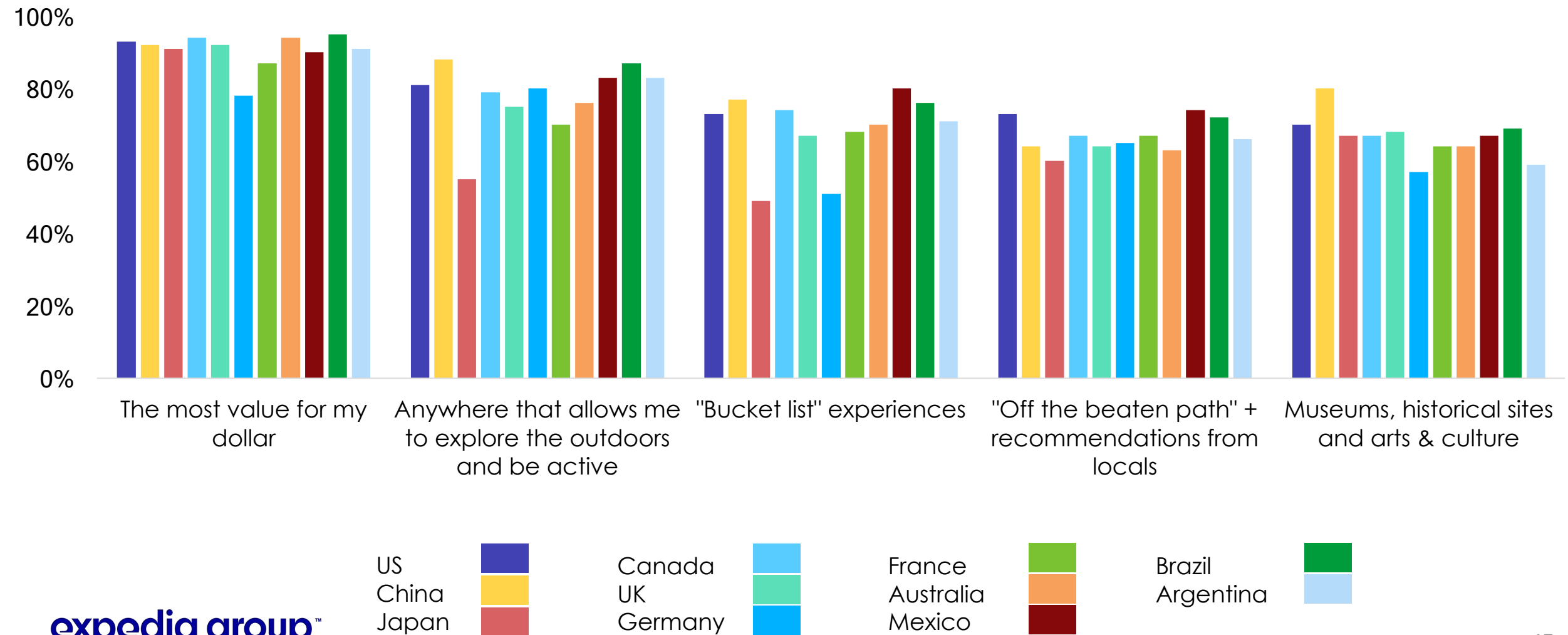
# SHOPPERS SEEK VACATION INSPIRATION

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



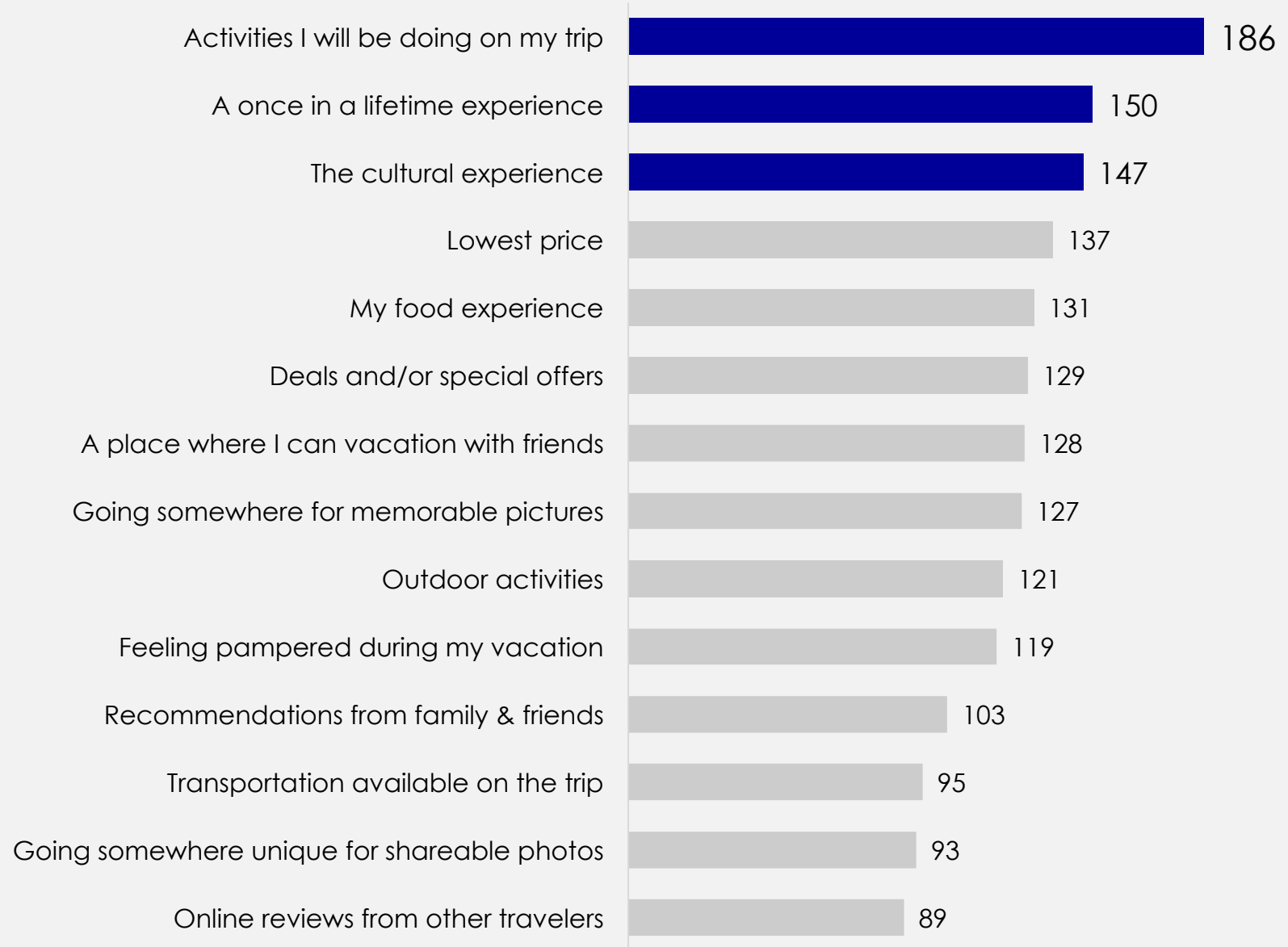
# TRAVELERS LOOK FOR VALUE & EXPLORATION

'You only live once' and 'off the beaten path' opportunities also ranked highly in consideration



# ACTIVITIES & EXPERIENCES DRIVE TRAVEL DECISIONS

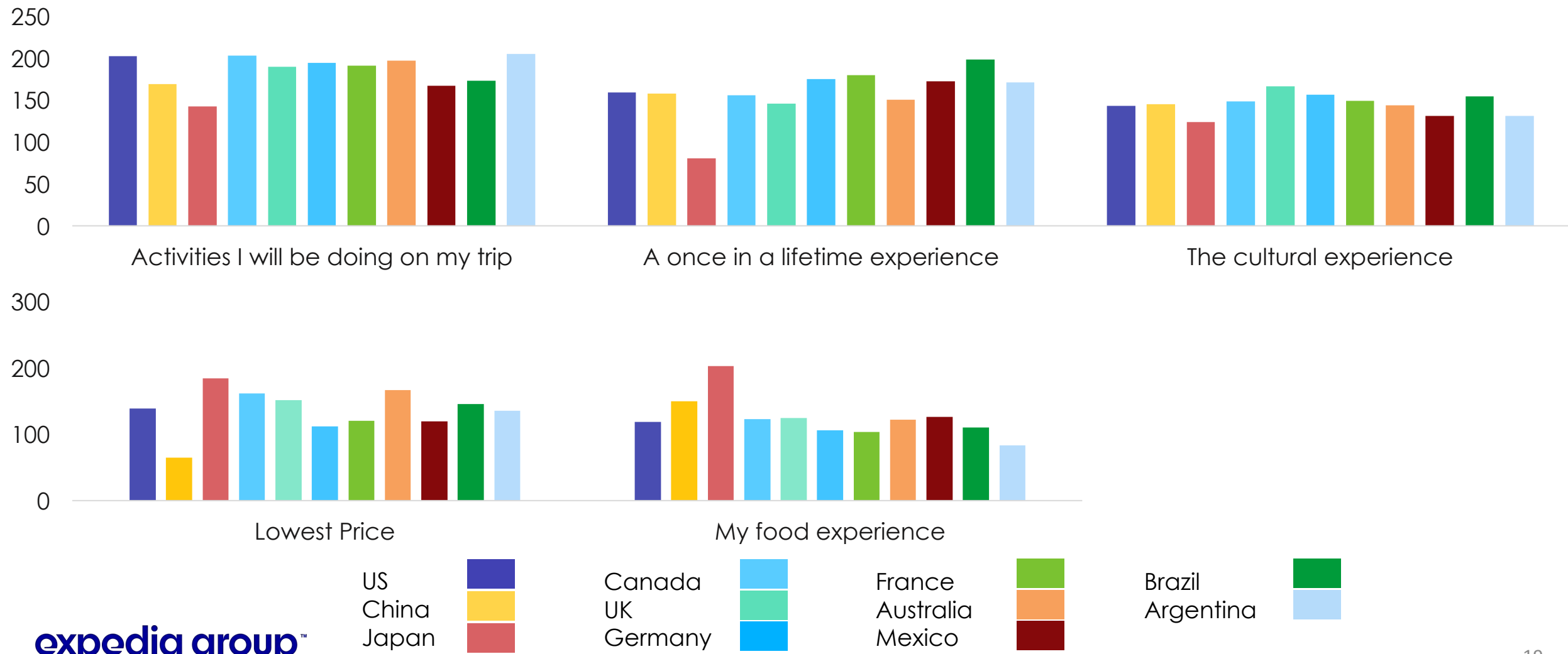
While price is important, people make travel decisions based more on their heart than their wallet





# ACTIVITIES & EXPERIENCES VARY

Japanese and Chinese travelers prioritize food experiences





# INFLUENCES & KEY CONNECTION POINTS



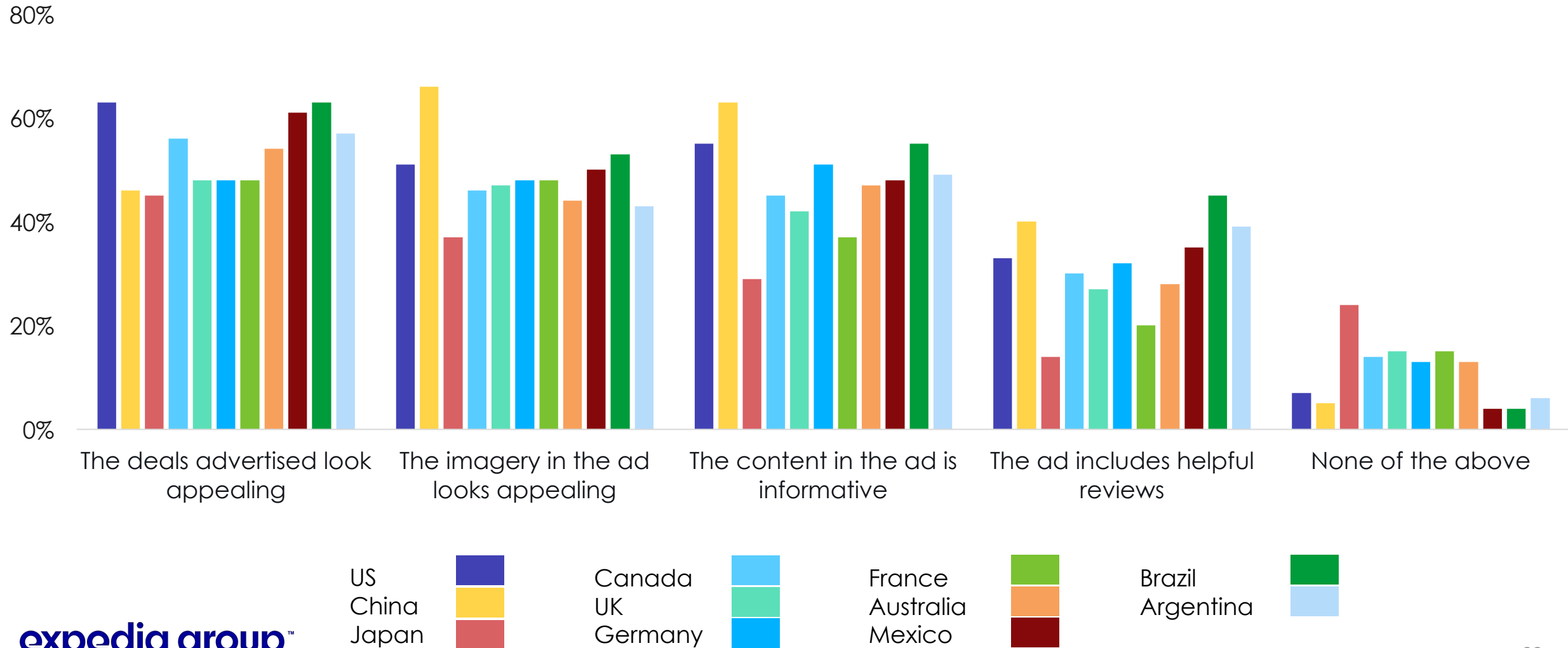
# SOCIAL MEDIA INFLUENCES TRAVEL DECISIONS

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



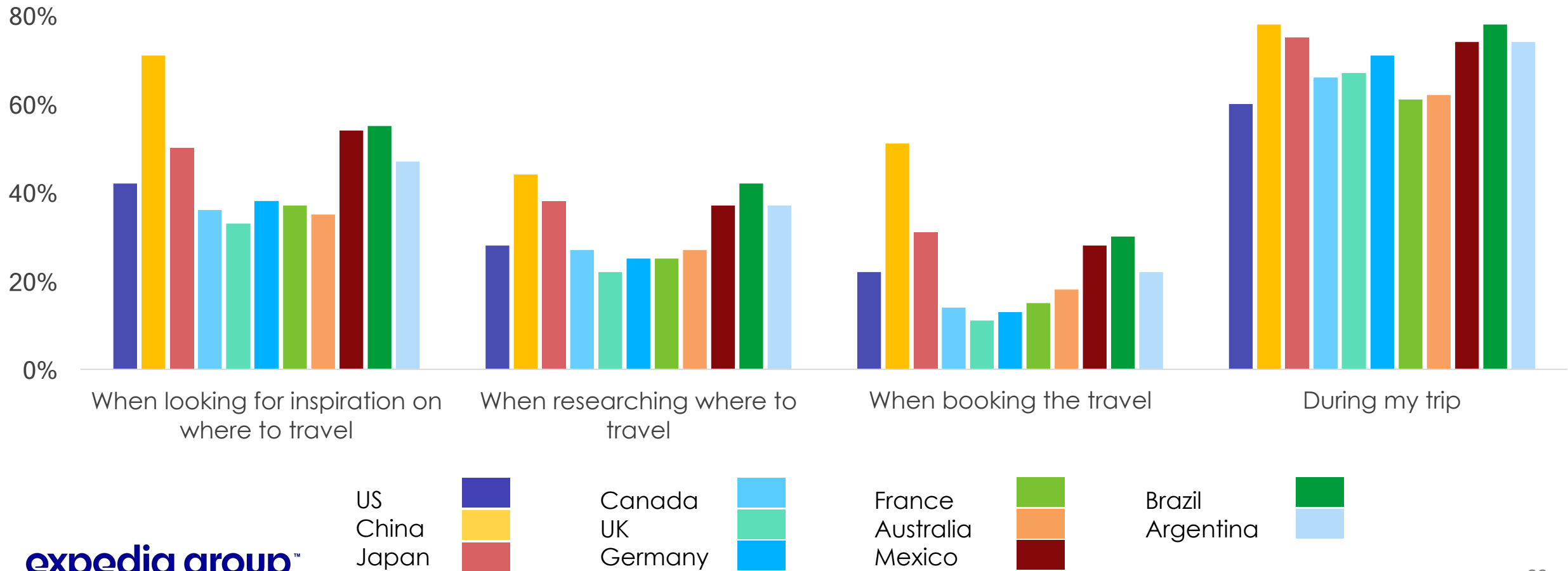
# ADS WIN WITH DEALS & STUNNING PICTURES

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.



## 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.





# THANK YOU

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