NORTH AMERICAN TRAVEL & TOURISM TRENDS 2017

Travel habits, behaviors, and influencers of American and Canadian Travelers



METHODOLOGY ONLINE SURVEY



Data Collection Method

Quantitative Survey



Field Work 30 March – 7 April 2017



Qualifying Criteria

Must have booked online travel in the past year



Sample Size

U.S: n=1000 Canada: n=1001 Total North American n=2002



HOW THEY TRAVEL

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NUMBER OF **TRIPS PER YEAR VARIES** SIGNIFICANTLY BETWEEN THE TWO COUNTRIES

Americans travelers take almost two more trips per year than Canadians

Number of Trips Taken in the Past Year









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Q9: Typically, how many personal/leisure and business trips do you take per year?

NORTH AMERICAN TRAVELERS TAKE, ON AVERAGE, MORE THAN 3 TRIPS A YEAR

American travelers take the most personal and business trips



Trips in the Past Year



Q9: Typically, how many personal/leisure and business trips do you take per year? Q10: What types of vacations have you taken in the past year? *Total (n=2002) US (n=1001) Canada (n=1001)* **TIME SPENT ON VACATION** FOR THE TWO COUNTRIES ALSO VARIES WIDELY

Canadian travelers know how to vacation, taking—on average—two days longer for their vacation than American travelers

Time Spent on Vacation



6

Q15. How long w as your vacation?

CANADIAN TRAVELERS ARE THE MOST LIKELY TO TRAVEL OUTSIDE OF THEIR COUNTRY

Canadian travelers love to travel internationally, whereas American travelers are more likely to travel domestically

Total (n=2002) US (n=1001) Canada (n=1001)

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NORTH AMERICANS LARGELY **TRAVELED BY PLANE** TO GET TO THEIR LAST DESTINATION

Canadian travelers travel by plane more often than American travelers

American travelers are more likely to travel by car

How did you get to your destination?



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Total (n=2002) US (n=1001) Canada (n=1001)

RELAXING TRIPS WERE THE MOST POPULAR VACATION BOOKED ONLINE FOR NORTH AMERICANS

Visiting family was also important and a popular vacation last booked online



Type of Vacation Last Booked Online

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Q9: Typically, how many personal/leisure and business trips do you take per year? Q10: What types of vacations have you taken in the past year? Total (n=3001) China(n=1000) Japan (n=1001) Australia (n=1000)

VISITING FAMILY VACATIONS WERE THE MOST POPULAR VACATION TAKEN IN THE PAST YEAR FOR AMERICAN AND CANADIAN TRAVELERS

American travelers are more likely to have taken family play and romantic trips Canadian travelers are more likely to visit family, relax, and sightsee

55% 53% 52% 50% 49% 47% 45% 43% 42% 36% 28% 27% 24% 21% 20% Visiting Family Relaxing Sight-seeing Family Play Special Event 21% 24% 22% 20% 19% 17% 18% 19% 17% 11% 12% 10% 9% 7% Romantic Getaway Activity based Stay-cation Partv Bleisure TOTAL US Canada

Type Of Vacation Taken In The Past Year



Q9: Typically, how many personal/leisure and business trips do you take per year? Q10: What types of vacations have you taken in the **past year**? *Total (n=2002) US (n=1001) Canada (n=1001)*

HOTELS ARE THE MOST POPULAR PLACE TO STAY FOR NORTH AMERICANS

While hotels were the most popular form of accommodation for North Americans, American travelers were more likely than Canadians to stay in hotels

Where did you stay?



BUDGET WAS A PRIMARY FACTOR FOR AMERICAN AND CANADIAN TRAVELERS WHEN BOOKING THEIR LAST TRIP

Travelers from North America considered budget a significant factor and they spent similarly across vacation components

Not surprisingly, Canadians budgeted a little more for flights





Q18. Was budget a primary factor when you were researching/booking your last trip? Q19. How much total did you spend on your last trip, including flight, hotel, transportation, food, shopping, tours etc.? Q20. What proportion of your travel budget did you spend on each of the following? *Total (n=2002) US (n=1001) Canada (n=1001)*



Proportion Spent On Hotel 26% Flight 22% Food 16% Transportation 10% Attractions 10% Shopping 9% Home sharing 3% Other 3%



Proportion Spent On



MOST TRAVELERS BOOKED THEIR LAST ONLINE **TRIP LESS THAN 3 MONTHS AGO**

Once a decision is made, 65% of North American travelers usually book within 3 weeks



Total (n=2002) US (n=1001) Canada (n=1001)

TRAVELER ATTITUDES

OVER HALF OF NORTH AMERICANS ARE DECIDING BETWEEN MULTIPLE DESTINATIONS



How do you feel when you first start planning a trip/holiday?

27%

28%

27%



Q23. Which of the follow ing options best describes the w ay you feel w hen you first decide to take a trip? (Please select one) Q24. Which of the follow ing options best describes the w ay you feel w hen you <u>first start planning</u> a trip/holiday? *Total (n=2002) US (n=1001) Canada (n=1001)*

68%

67%

68%

FOR NORTH AMERICANS, OTAS AND SEARCH ENGINES ARE THE MOST INFLUENTIAL ONLINE SOURCES FOR BOOKING

Online Sources That Influence Decision Making In Online Booking



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 Total (n=2

Q27. Which of the follow ing online sources influence or inspire your decision making process in **booking a trip**? *Total (n=2002) US (n=1001) Canada (n=1001)*

NORTH AMERICANS LOOK TO A WIDE RANGE OF SOURCES FOR INFLUENCE AND INSPIRATION

56% 54% 58% 50% 49% 52% 50% 51% 48% 46% 45% 47% 37% 38% 37% 29% 30% 28% 24% 23% 25% Family, friends (in person) Travel content Sites Search Enaines **Online Travel Agencies** Family, friends online Social Media **Online Videos** 21% 21% 21% 17% 19% 16% 15% 14% 16% 12% 15% 10% 14% 14% 15% 10% 11% 8% 11% 6% 9% 2% 2% Online News Magazines, etc. Blogs Travel Agents Online Advertisina Brands that I follow or TV/Radio Other Content like on social media TOTAL US Canada

Which of the following sources influence or inspire your decision making process when booking a trip?



Q25. Which of the following sources influence or inspire your decision making process when booking a trip? Total (n=2002) US (n=1001) Canada (n=1001)

DEALS CONTINUE TO BE THE MOST IMPORTANT FACTOR IN THE DECISION MAKING PROCESS, BUT REVIEWS AND INFORMATIVE CONTENT ARE NEARLY AS IMPORTANT

Informative content from destinations and/or travel brands is more likely to influence American travelers than Canadians





Q32. Please select to w hat extent you agree w ith the follow ing statements. (*Please select one for each statement*) Q33. How can ads help influence in your decision making process? (Please select all the apply) *Total (n=2002) US (n=1001) Canada (n=1001)*

OTAS ARE THE MAIN SOURCE NORTH AMERICANS USE TO BOOK TRAVEL BY AN AVERAGE OF 18% OVER SEARCH ENGINES



Q38: Please indicate which resources you used to book travel online on your last trip Total (n=2002) US (n=1001) Canada (n=1001)

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SOURCES OF INFLUENCE

WHEN ASKED TO PRIORITIZE, **ACTIVITIES AND EXPERIENCES WERE RANKED THE MOST IMPORTANT CONSIDERATIONS**

Price and deals are important to North American travelers, particularly Canadians; however, activities and experiences remain the most important factors for both Canadians and Americans



	202	202	203
A once in a lifetime experience/trip aka a bucket list vacation	157	159	156
Deals and/or special offers	154	147	161
Lowest Price	150	139	161
The cultural experience	145	143	148
Going somewhere where I can take memorable pictures	128	132	124
Outdoor activities	124	128	121
My food experience	120	118	123
A place where I can vacation with friends	117	115	118
Recommendations from family & friends	103	102	104
Feeling pampered during my vacation	95	97	94
Online reviews from other travelers	93	90	96
Going somewhere unique that will produce photos	93	96	90
Notable Country Difference Based on ranking of most/least important considerations in choosing last trip using rotations of considerations and Max-Diff Scaling.			



202

203

Activities I will be doing on my trip

TOTAL

202

MOVEMENT BETWEEN DEVICES INDICATES A PATTERN OF CROSS-DEVICE USAGE

Which of the following activities relating to your travel did you start one device and continue and finish on another?





Q48. Which of the following activities relating to your travel did you start one device and continue and finish on another? Total (n=2002) US (n=1001) Canada (n=1001)

DETERMINING FACTORS FOR CHOOSING A DESTINATION

American travelers are more family oriented than Canadians

American travelers opt for locations and accommodations that are "off the beaten path"

94% 93% 94% 81% 80% 79% 73% 74% 73% 73% 70% 70% 67% 68% 67% You only live once, so taking risks and I often opt for "off the beaten path" I look for the best deals and most I'll go anywhere that allows me to I prefer to go to museums, historical explore the outdoors and be active crossing things off my 'bucket list' is locations and/or recommendations sites and arts & culture fill up my value for my dollar imperative from locals travel itinerary 70% 67% 66% 64% 64% 65% 62% 59% 59% 48% 48% 48% 29% 29% 28% I prefer all-inclusive vacations like Every vacation is family oriented and I'm all about taking a nap on the I plan all my travel around where and I don't like travelling far, as long as I'm resorts and cruises where I don't have has a specific focus on what will keep beach, spa treatments and all-day what Leat and drink not at work. I'm on vacation my family entertained and happy relaxation to worry about a thing TOTAL US Canada Notable Country Difference

(% of Travelers Who Somewhat Agree/Strongly Agree With The Statement)



Q8 Please select to what extent you agree with the following statements. (Please select strongly disagree, somew hat disagree, somew hat agree or strongly agree for each statement). Total (n=2002) US(n=1001) Canada (n=1001)

DESKTOPS DOMINATE THE PATH TO PURCHASE, WHILE SMARTPHONES DOMINATE IN-TRIP

Desktop/laptop is still the common device for inspiration, researching, and booking, while travelers use their smartphones in-trip





Q47. For each of the follow ing statements, which device(s) do you use? Please select all that apply. Q48. Which of the follow ing activities relating to your travel did you start one device and continue and finish on another? *Total (n=2002) US (n=1001) Canada (n=1001)*

KEY INSIGHTS FOR NORTH AMERICANS

- Visiting family and relaxing are most popular for North American travelers
- Budget is important for both and they both tend to fly and stay in hotels
- North American use their laptops/desktops for inspiration, research, and booking, but switch to their smartphones once on vacation
- While North Americans decided within three or less months to take their last trip, they are still choosing between multi-leg destinations
- Deals, followed by activities, are the most important factors in the decision making process
- OTAs were the most popular resource American and Canadian travelers used for planning their last trip



KEY TAKEAWAYS



Use compelling imagery and informative content in your marketing channels that speaks both to the sightseeing opportunities and the activities and experiences of a place



Provide numerous deals and information on value and transportation to make the travel decision even easier



Create a multi-screen strategy with relevant content for how and at what stage people are using various devices



THANK YOU

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