

# 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





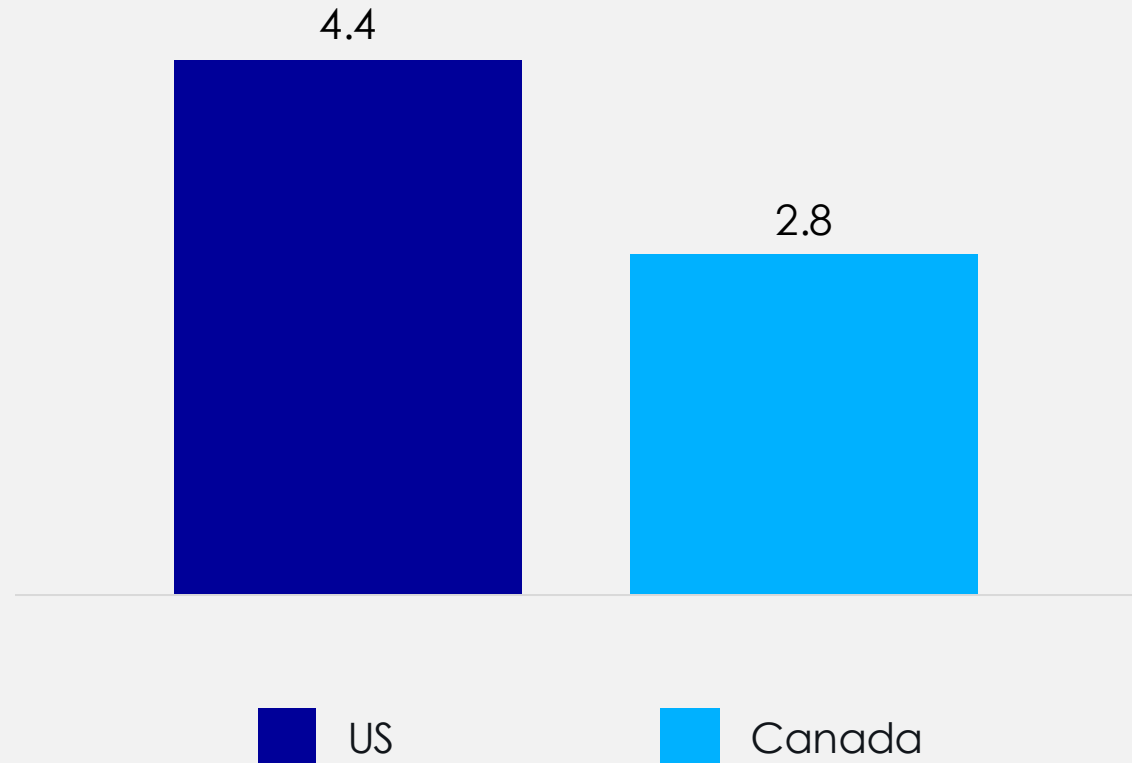
# HOW THEY TRAVEL



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

Americans travelers take almost two more trips per year than Canadians

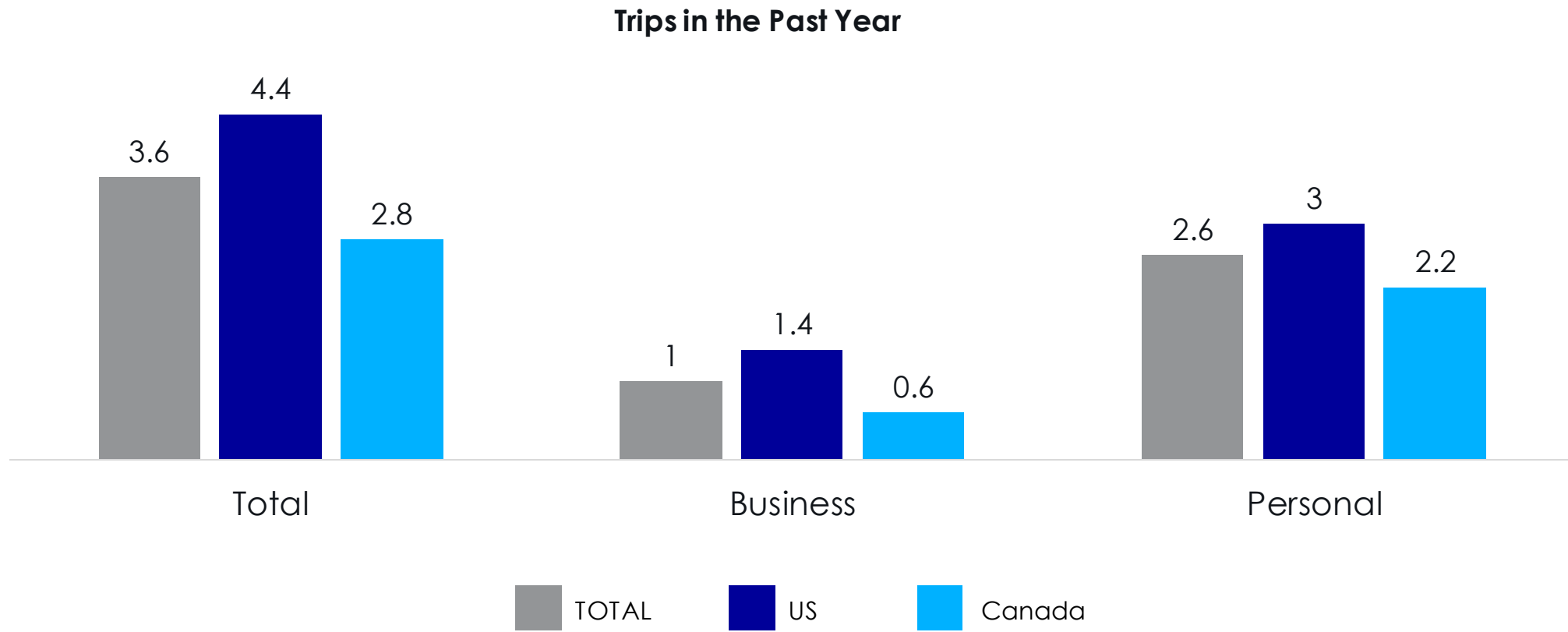
Number of Trips Taken in the Past Year



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

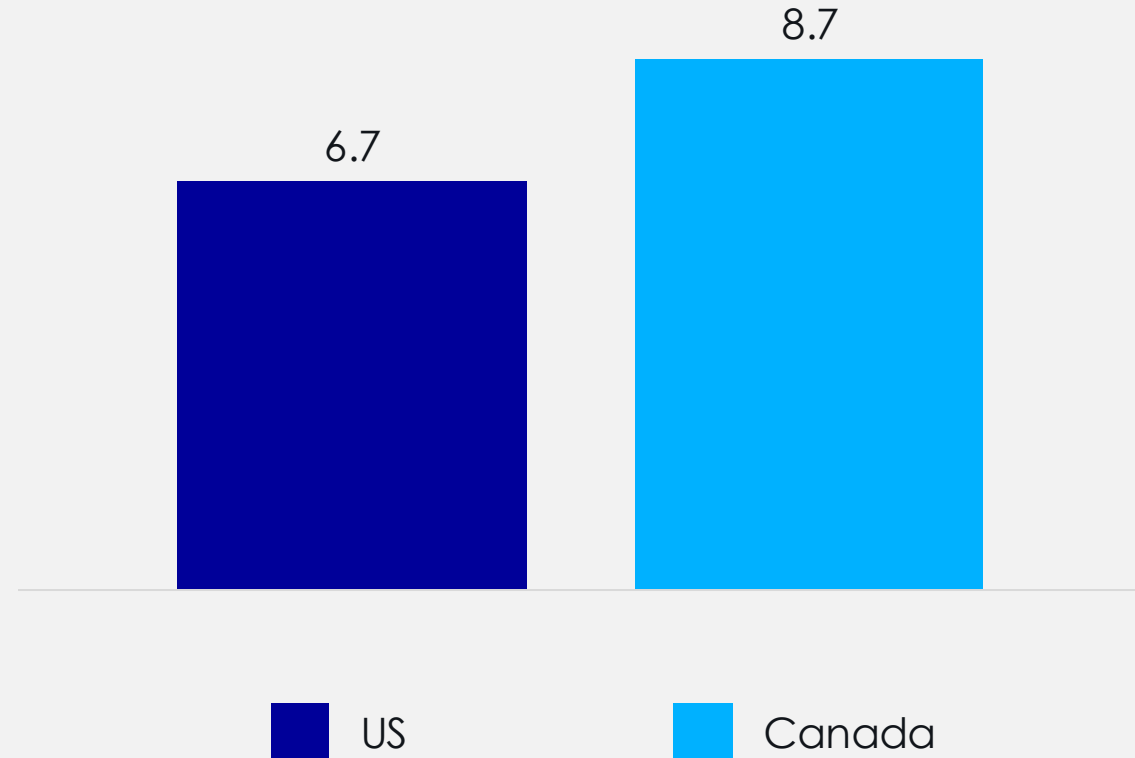
American travelers take the most personal *and* business trips



# TIME SPENT ON VACATION FOR THE TWO COUNTRIES ALSO VARIES WIDELY

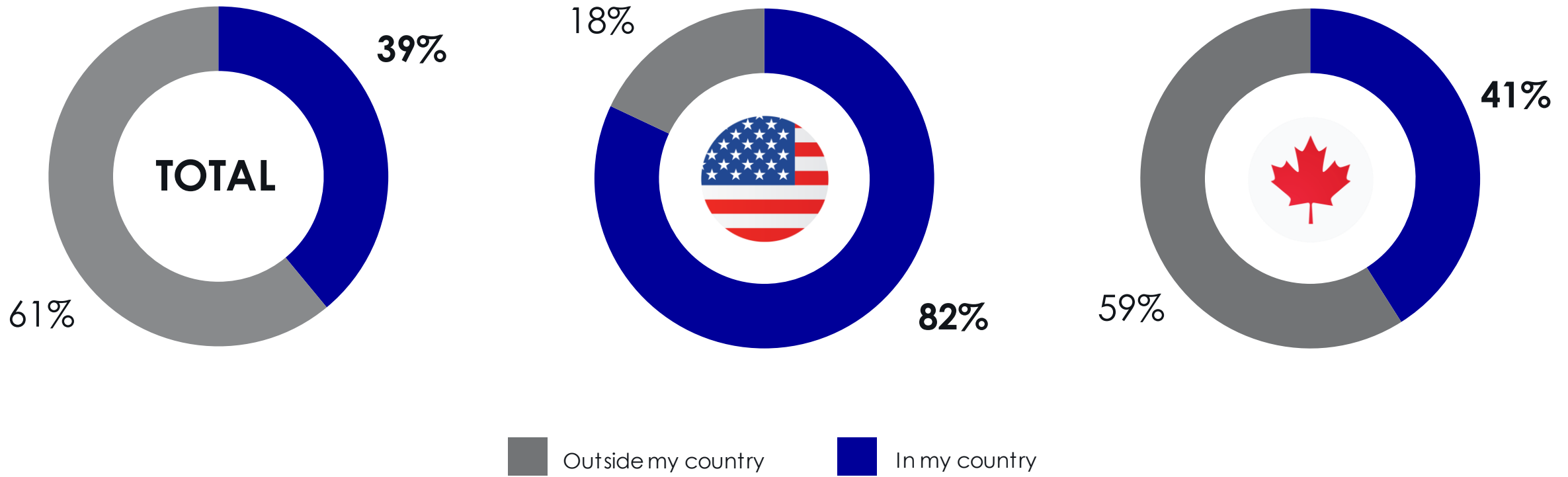
Canadian travelers know how to vacation, taking—on average—two days longer for their vacation than American travelers

Time Spent on Vacation



# 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

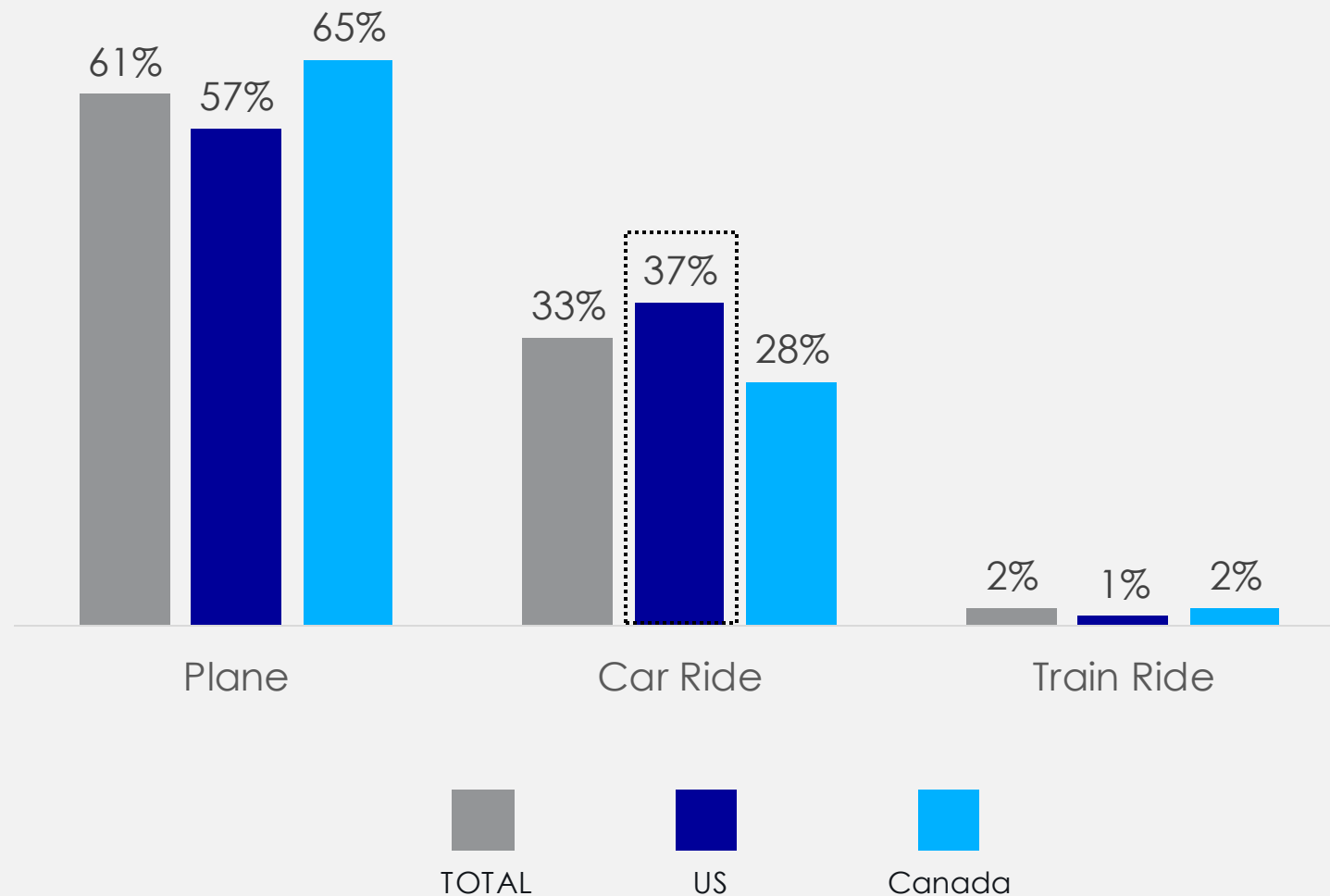


# NORTH AMERICANS LARGELY TRAVELED BY PLANE TO GET TO THEIR LAST DESTINATION

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?



Q16. How did you get to your destination?  
Total (n=2002) US (n=1001) Canada (n=1001)

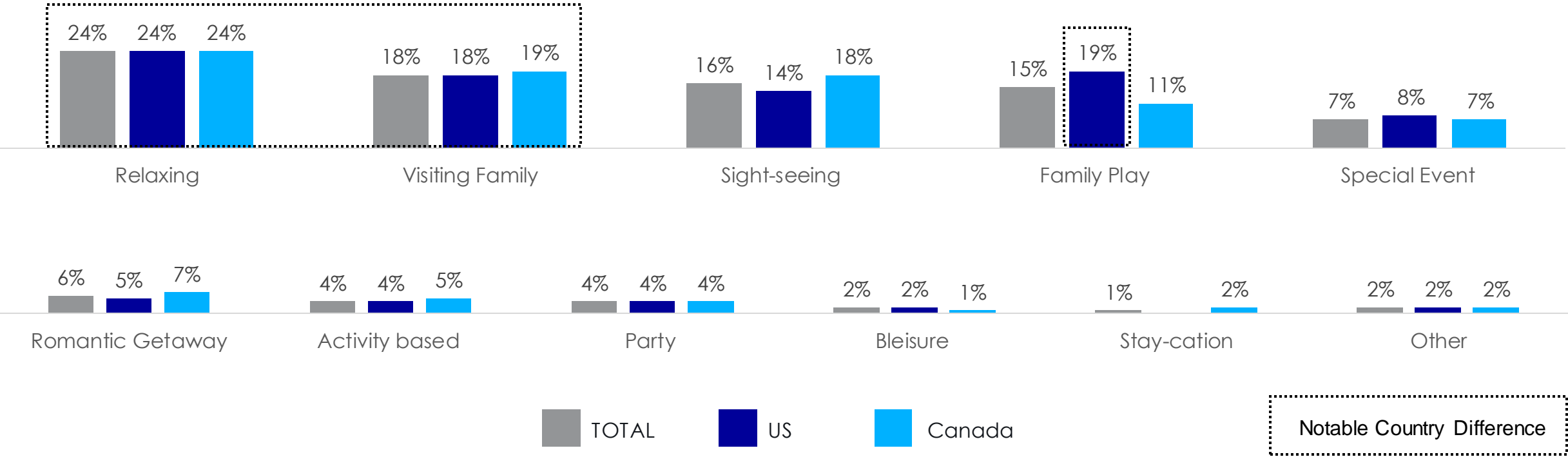
Notable Country Difference



# 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

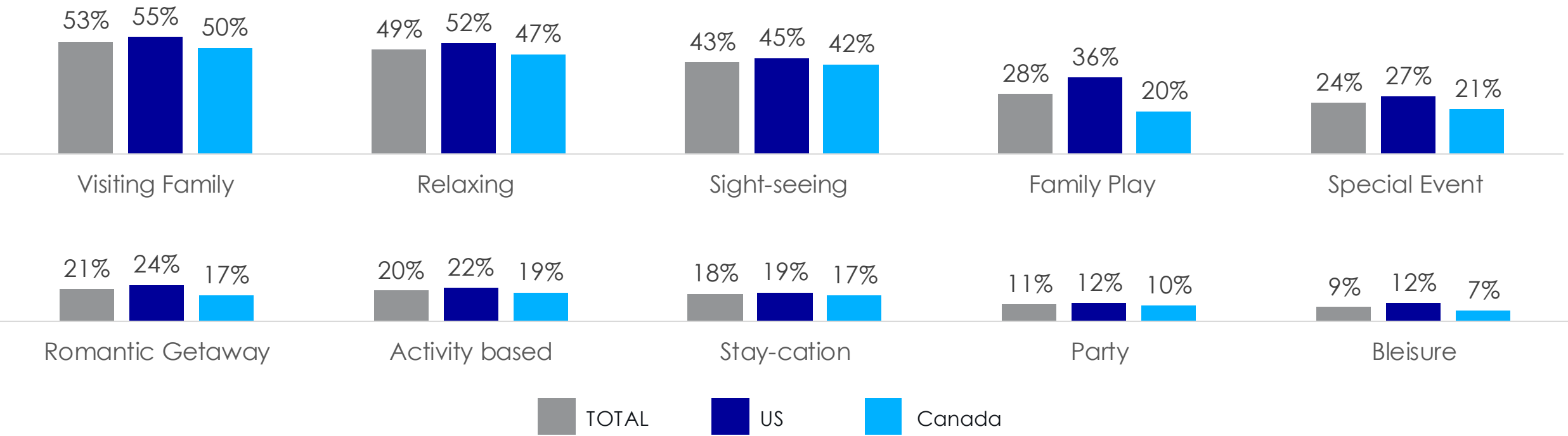


# VISITING FAMILY VACATIONS WERE THE MOST POPULAR VACATION TAKEN IN THE PAST YEAR FOR AMERICAN AND CANADIAN TRAVELERS

American travelers are more likely to have taken family play and romantic trips

Canadian travelers are more likely to visit family, relax, and sightsee

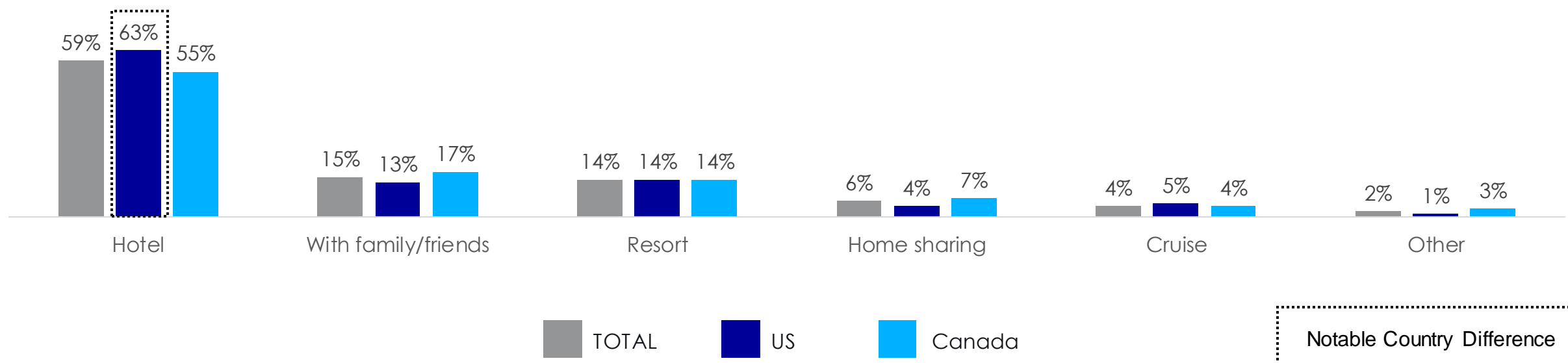
Type Of Vacation Taken In The Past Year



# 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

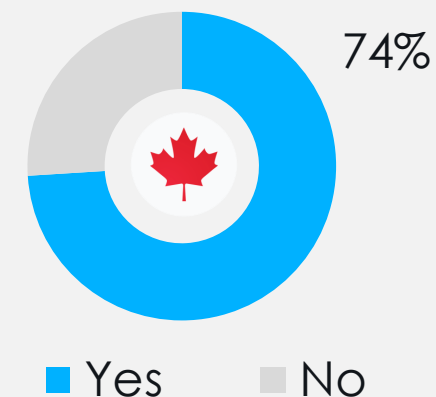
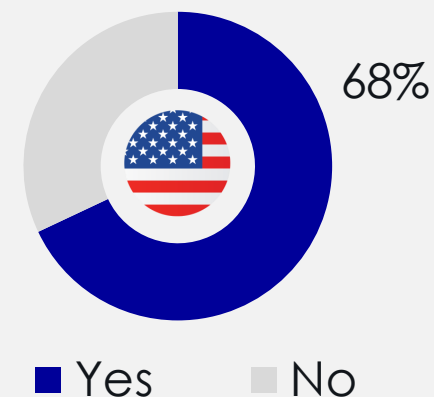
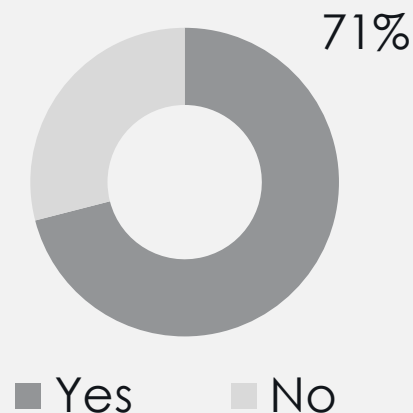
## Where did you stay?



# 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

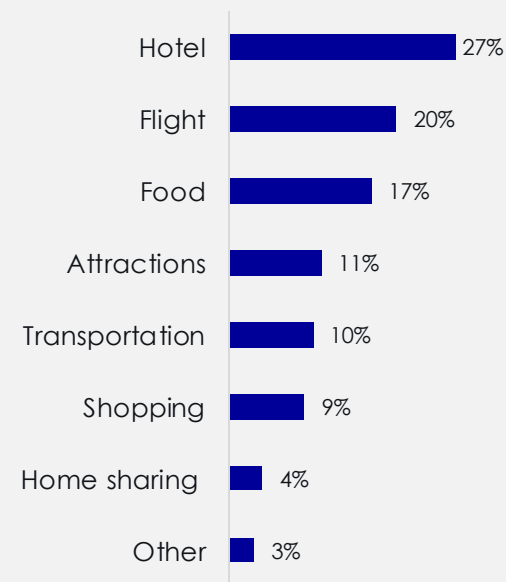
Not surprisingly, Canadians budgeted a little more for flights



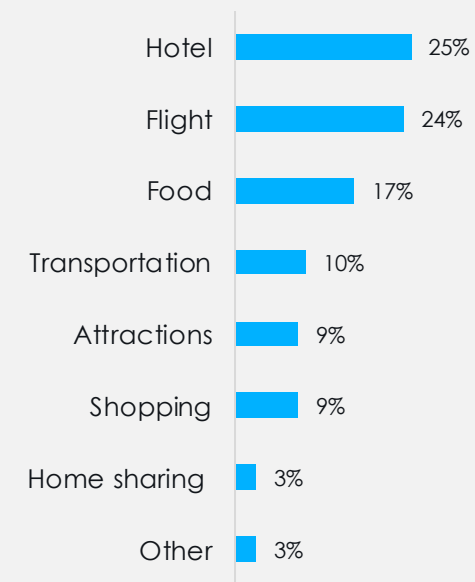
Proportion Spent On



Proportion Spent On



Proportion Spent On



Q18. Was budget a primary factor when you were researching/booking your last trip?

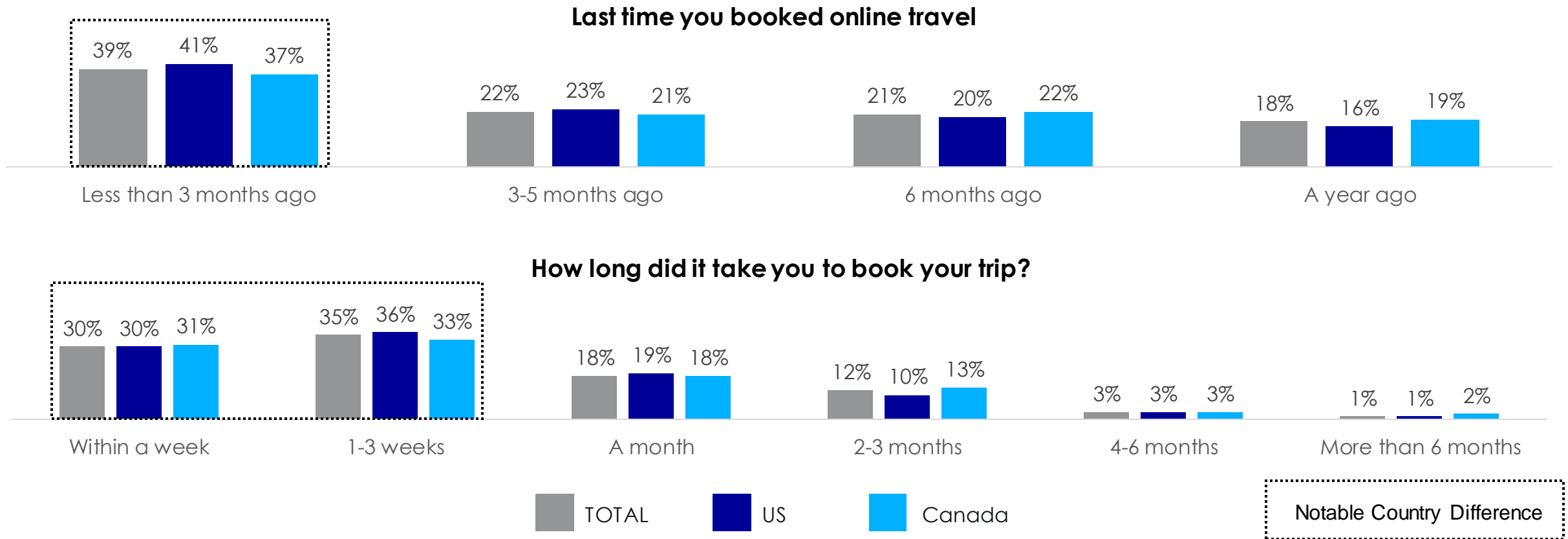
Q19. How much total did you spend on your last trip, including flight, hotel, transportation, food, shopping, tours etc.?

Q20. What proportion of your travel budget did you spend on each of the following?

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

# 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





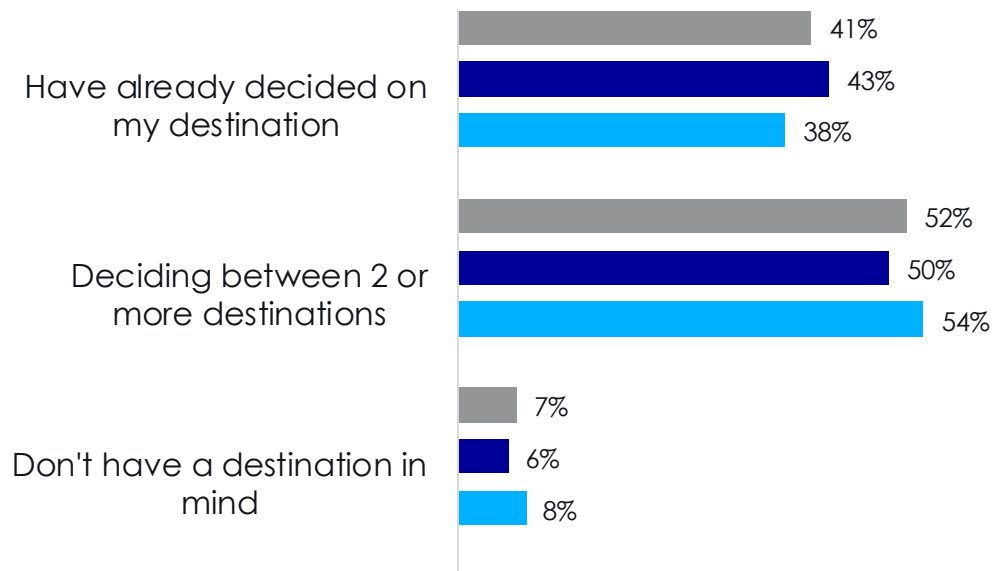


# TRAVELER ATTITUDES

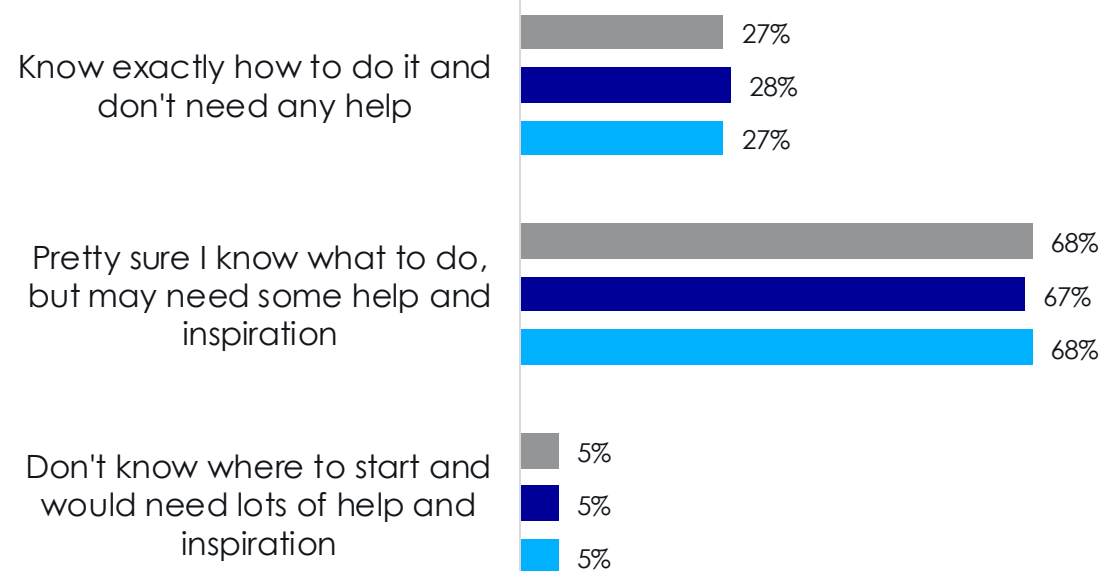


# OVER HALF OF NORTH AMERICANS ARE DECIDING BETWEEN MULTIPLE DESTINATIONS

How do you feel when you first decide to take a trip?



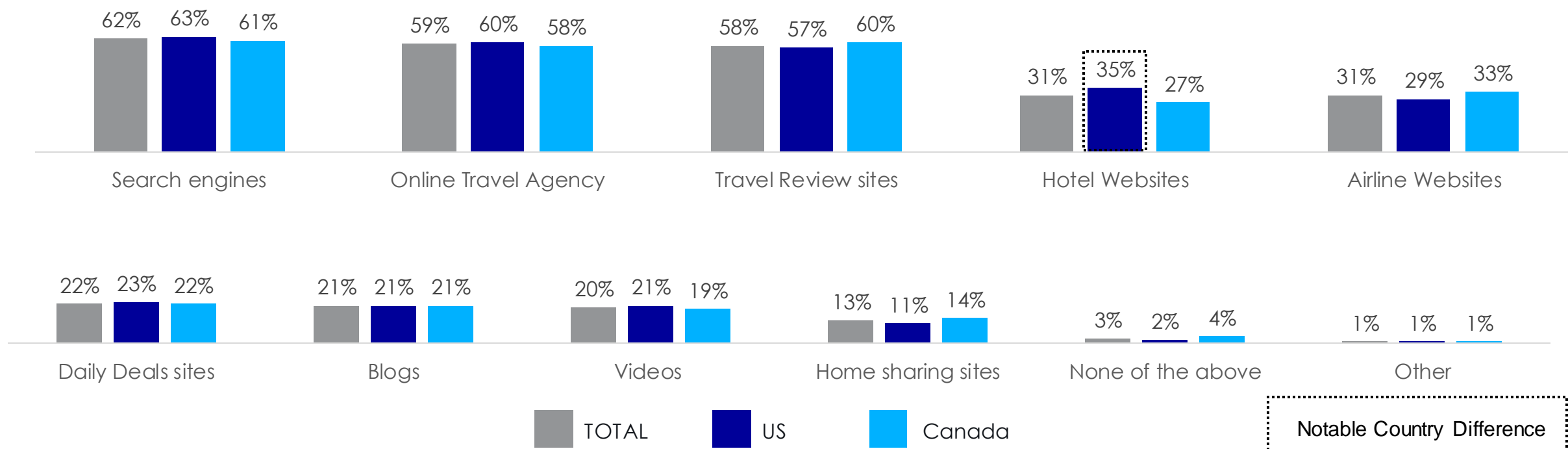
How do you feel when you first start planning a trip/holiday?



TOTAL US Canada

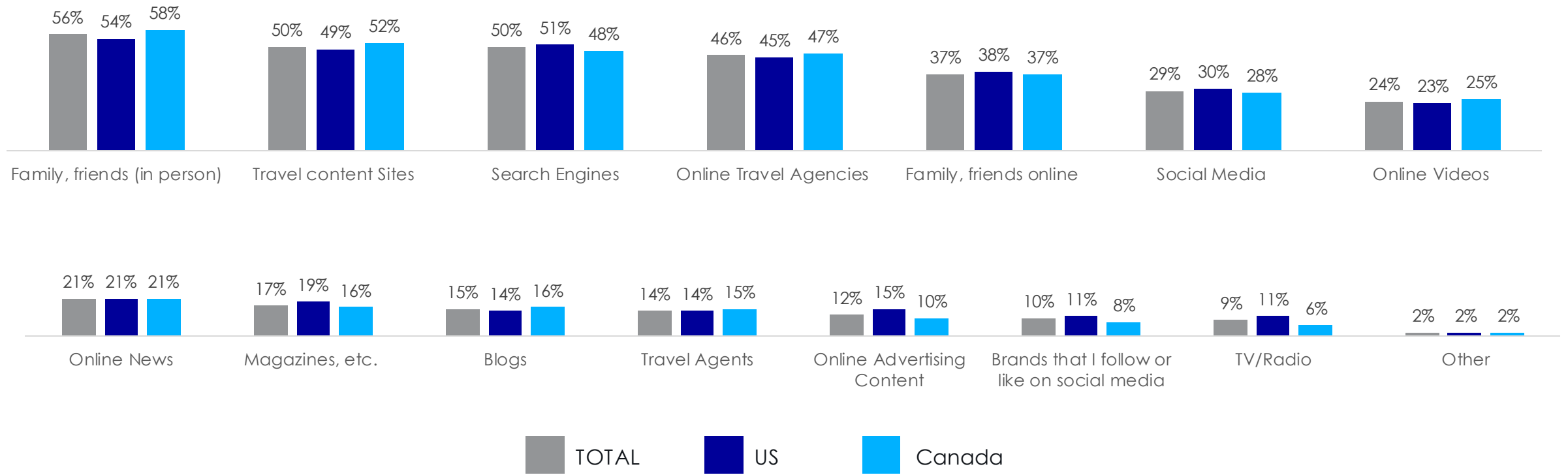
# FOR NORTH AMERICANS, OTAS AND SEARCH ENGINES ARE THE MOST INFLUENTIAL ONLINE SOURCES FOR BOOKING

Online Sources That Influence Decision Making In Online Booking



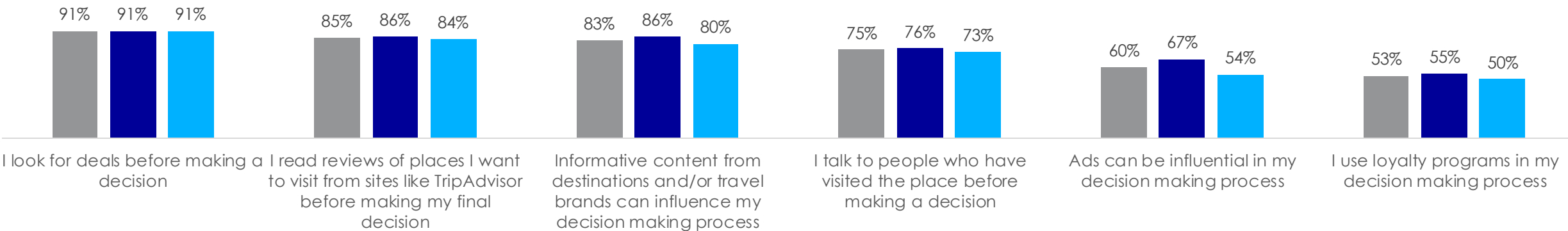
# NORTH AMERICANS LOOK TO A WIDE RANGE OF SOURCES FOR INFLUENCE AND INSPIRATION

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

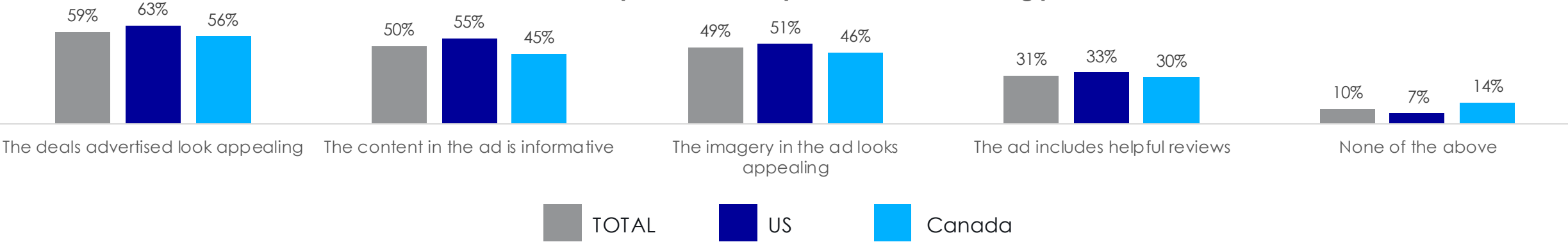


# DEALS CONTINUE TO BE THE MOST IMPORTANT FACTOR IN THE DECISION MAKING PROCESS, BUT REVIEWS AND INFORMATIVE CONTENT ARE NEARLY AS IMPORTANT

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

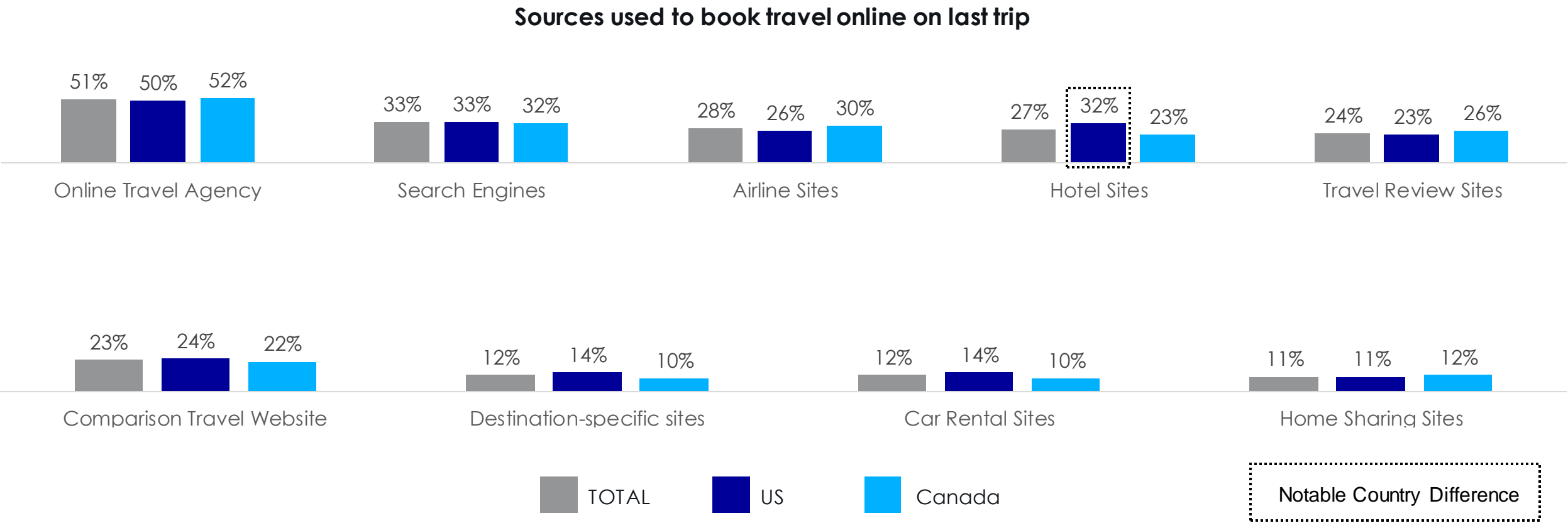


## How can ads help influence in your decision making process?





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





# 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

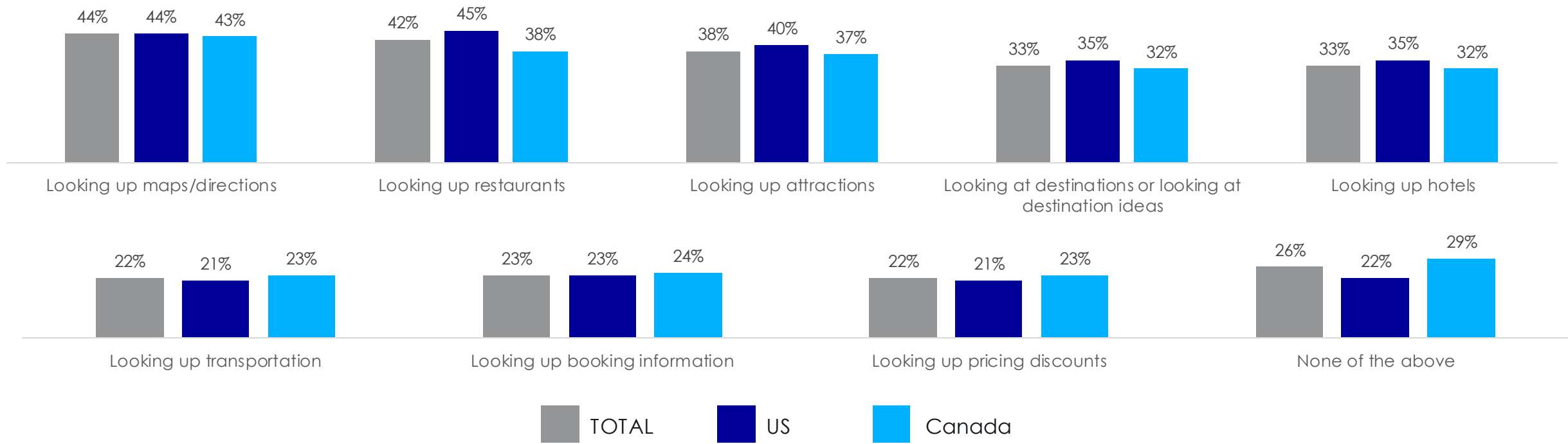
	TOTAL		
Activities I will be doing on my trip	 202	202	203
A once in a lifetime experience/trip aka a bucket list vacation	 157	159	156
Deals and/or special offers	 154	147	161
Lowest Price	 150	139	161
The cultural experience	 145	143	148
Going somewhere where I can take memorable pictures	 128	132	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.

# 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?

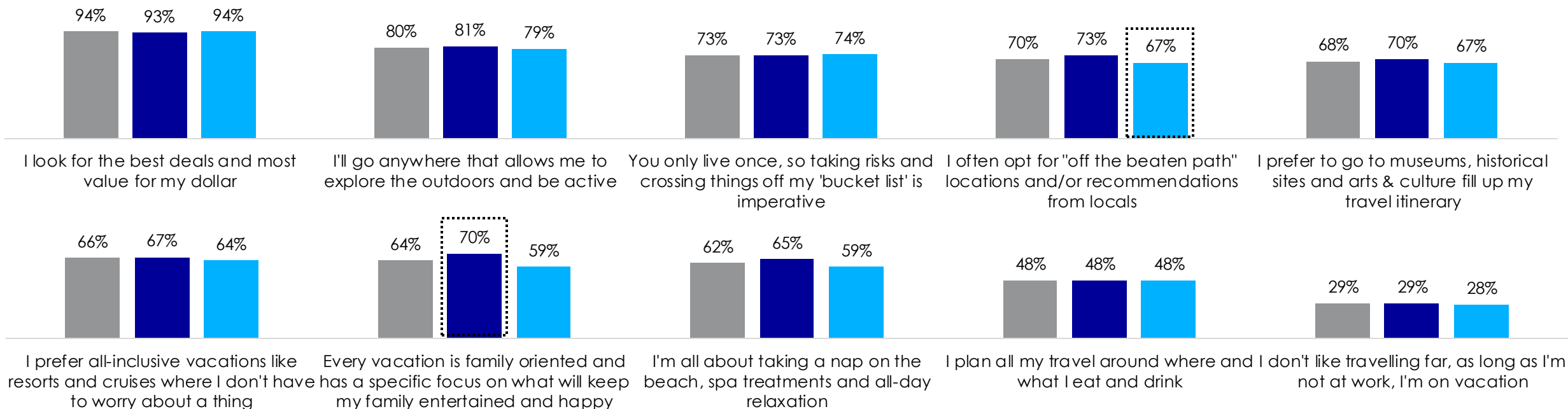


# DETERMINING FACTORS FOR CHOOSING A DESTINATION

American travelers are more family oriented than Canadians

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

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



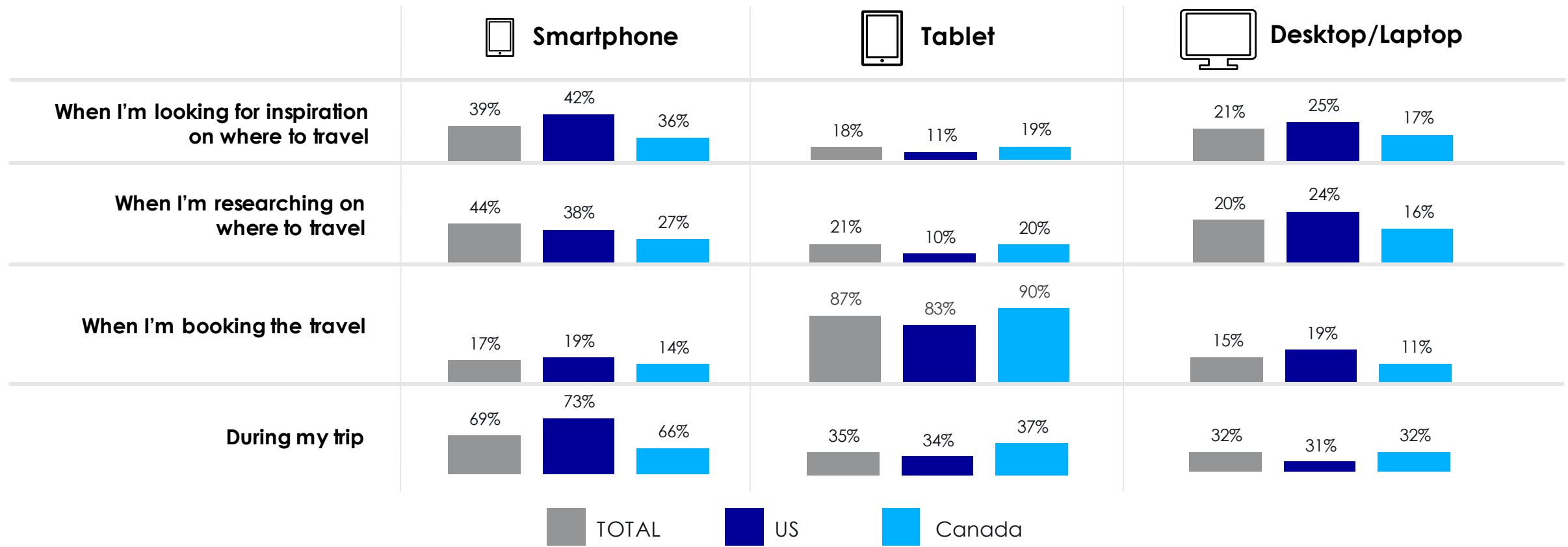
TOTAL
  US
  Canada

Notable Country Difference



# 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



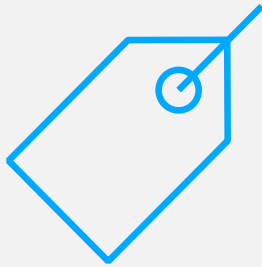
# KEY INSIGHTS FOR NORTH AMERICANS

- ▶ 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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