



EUROPEAN TRAVEL AND TOURISM TRENDS RESEARCH

Travel habits, behaviors, and
influencers of British, German,
and French travellers



METHODOLOGY



ONLINE SURVEY



Sample Size

British: n=1001
Germany: n=1000
France: n=1002
Total European n=3003



Data Collection Method

Quantitative Survey



Field Work

30 March – 7 April 2017



Qualifying Criteria

Must have booked online travel in the past year

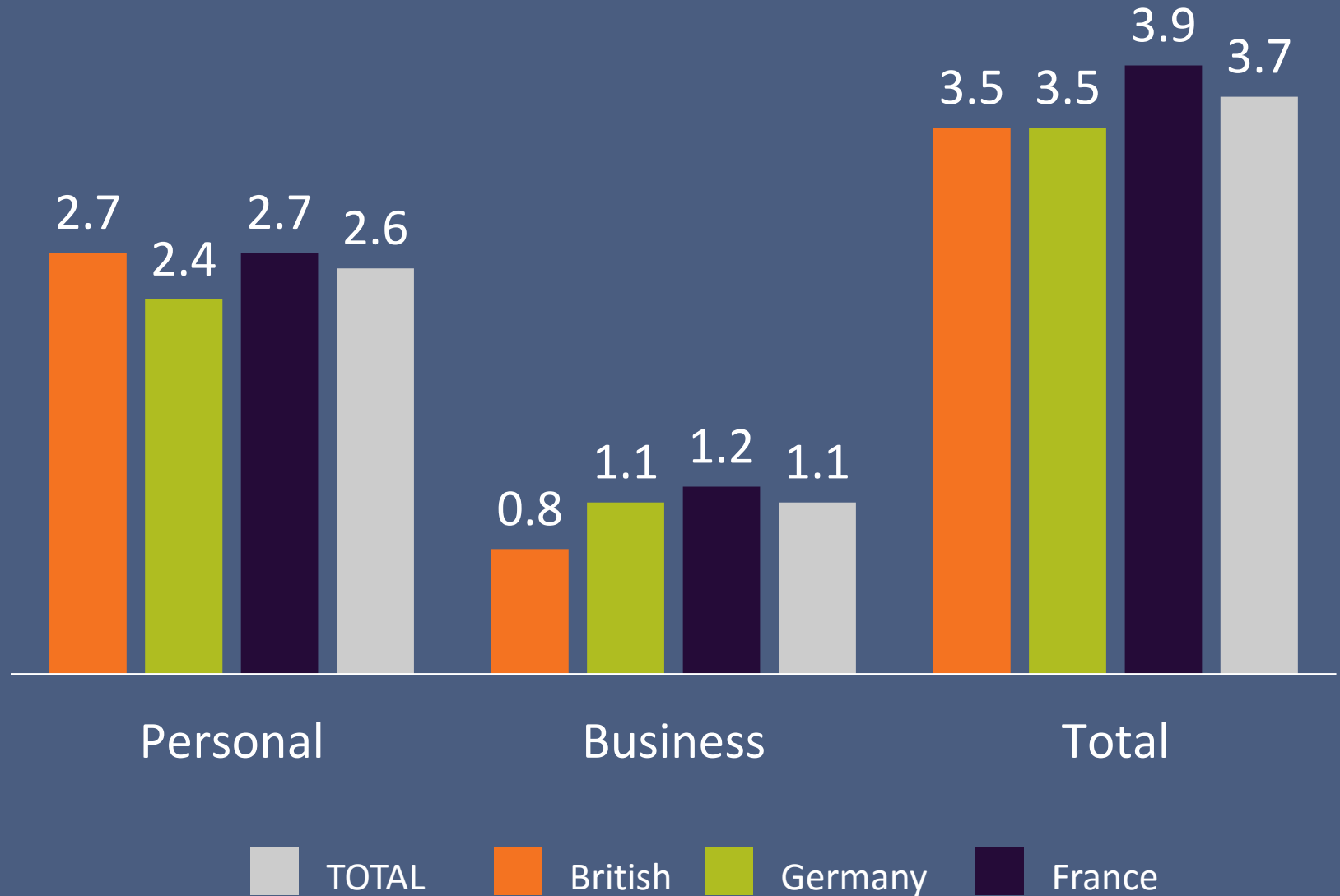


HOW EUROPEANS TRAVEL

EUROPEAN TRAVELLERS TOOK MORE THAN 3 TRIPS IN THE LAST YEAR

British and French travellers took the most personal trips, and French travellers took the most trips total

Number of Trips Taken in the Past Year

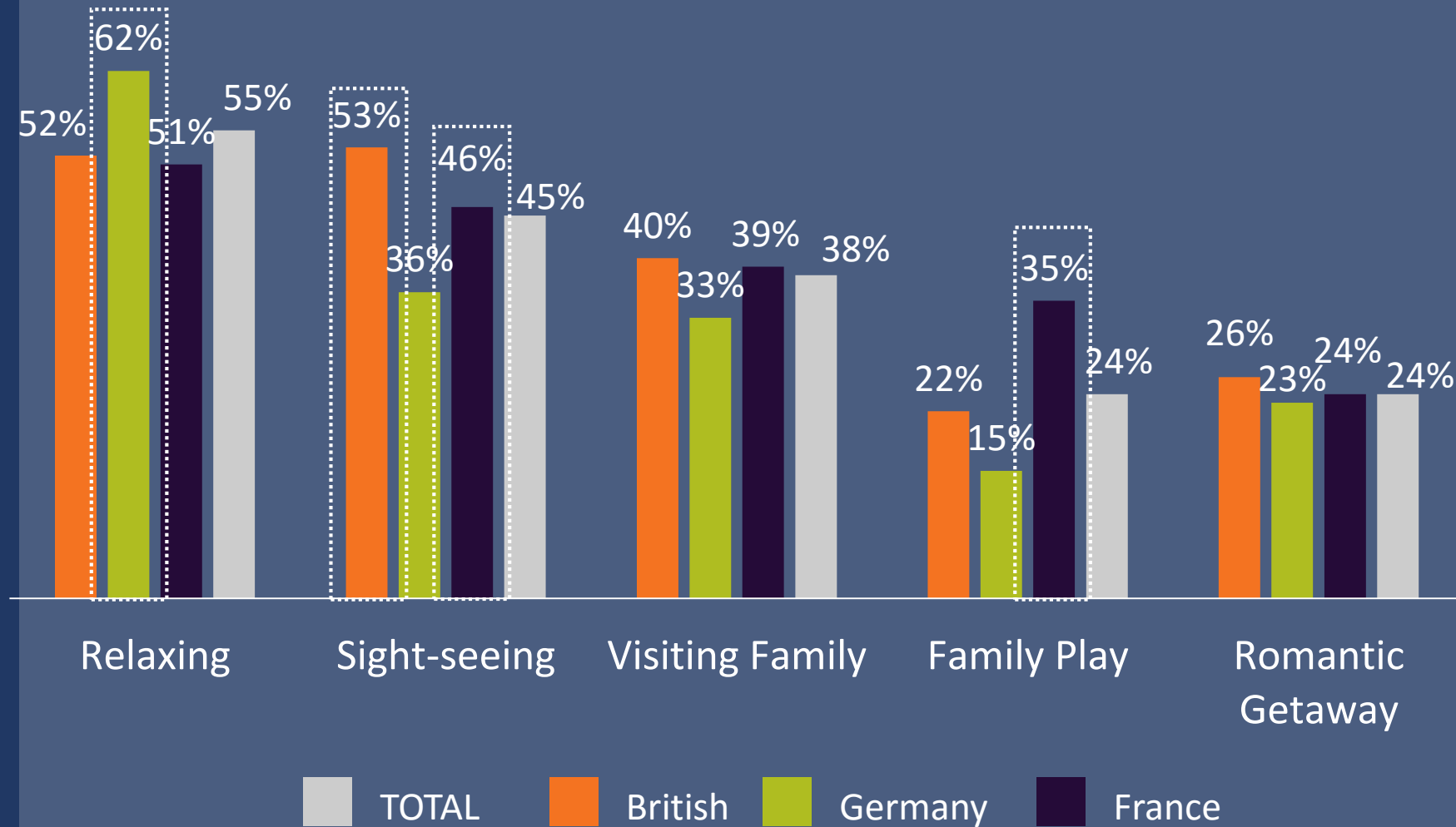


Q9: Typically, how many personal/leisure and business trips do you take per year?
Total (n=3003) British (n=1001) Germany (n=1000) France (n=1002)

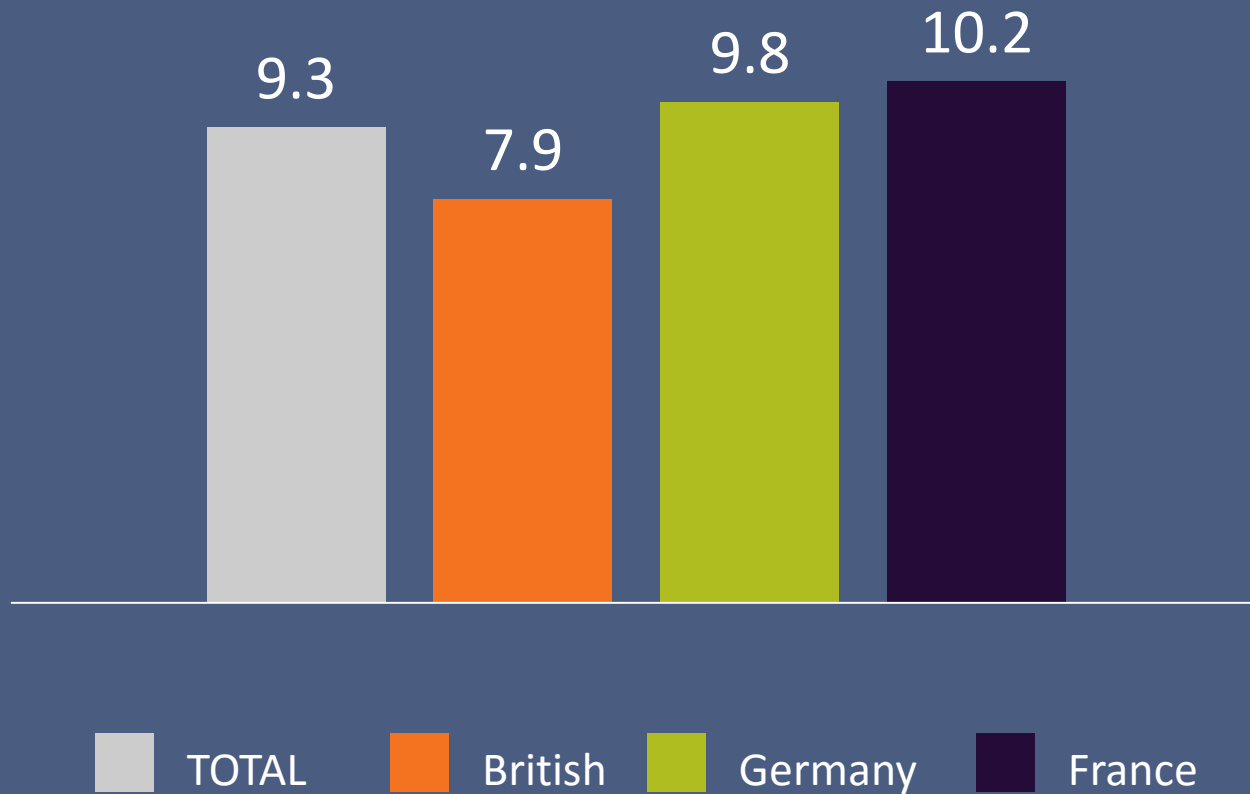
RELAXING TRIPS WERE POPULAR, ESPECIALLY WITH GERMAN TRAVELLERS

Sight-seeing holidays were also big with British and French travellers, while family play trips were only notable with the French

Types of Vacation Taken in the Past Year



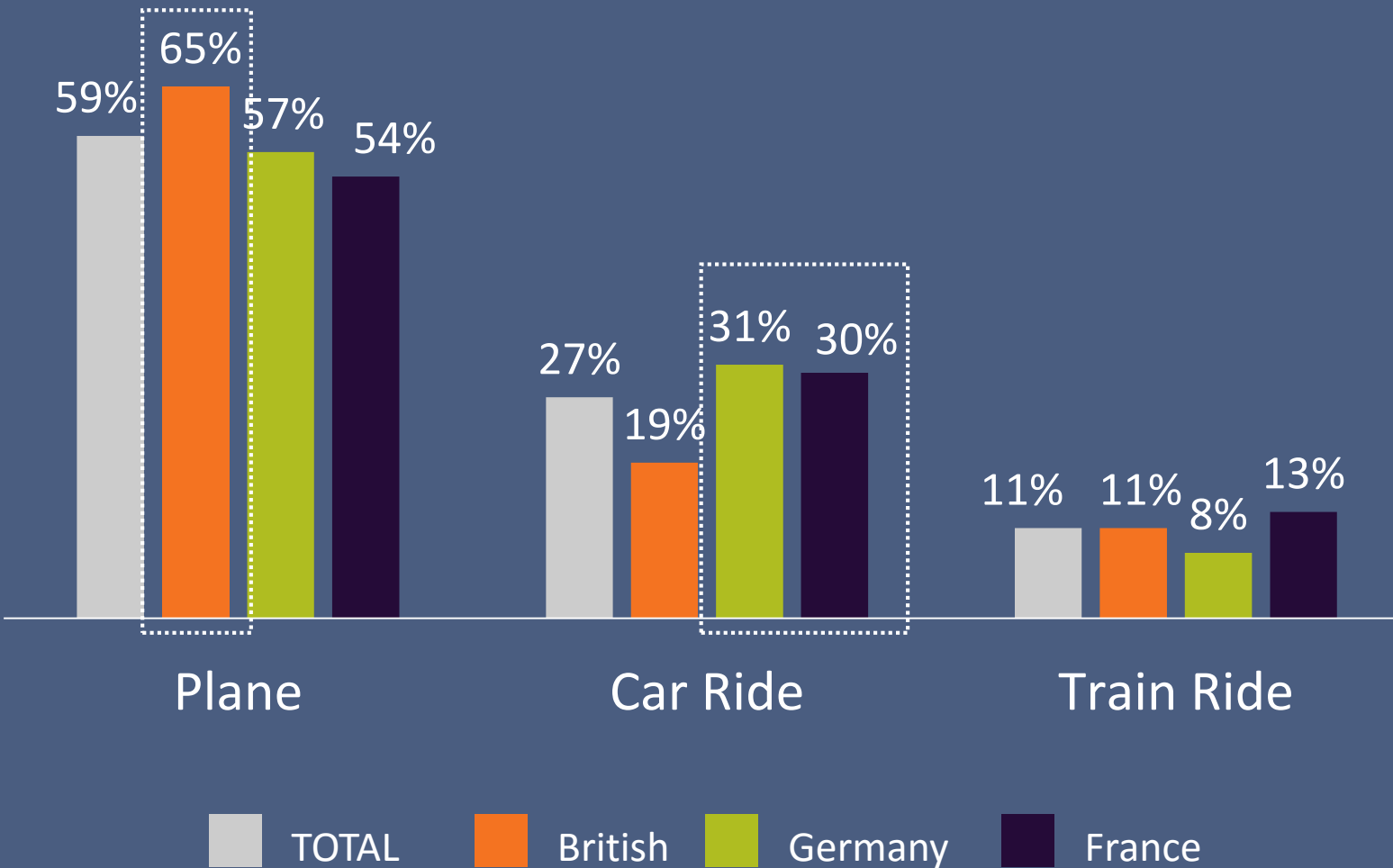
Last Vacation Duration in Days



EUROPEAN TRAVELLERS TOOK ON AVERAGE MORE THAN 9 DAYS FOR HOLIDAY

At nearly or more than 10 days in length, the last trip French and German travellers took was significantly longer than the last British holiday

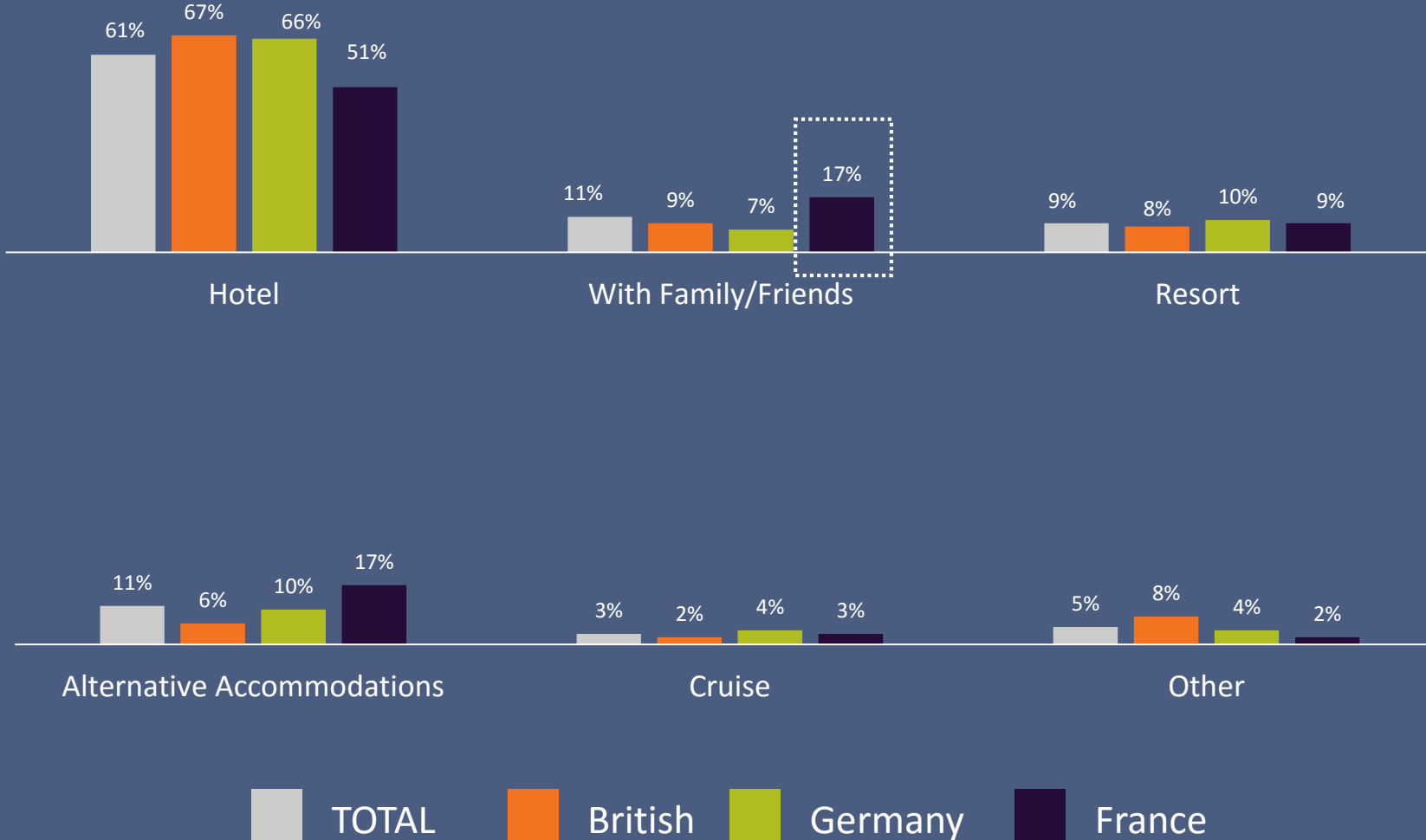
Type of Travel to Last Destination



EUROPEANS LARGELY TRAVELLED BY PLANE TO GET TO THEIR LAST DESTINATION

German and French travellers were more likely than the British to travel by car whereas the British were the most likely to fly

Accommodations of Last Trip

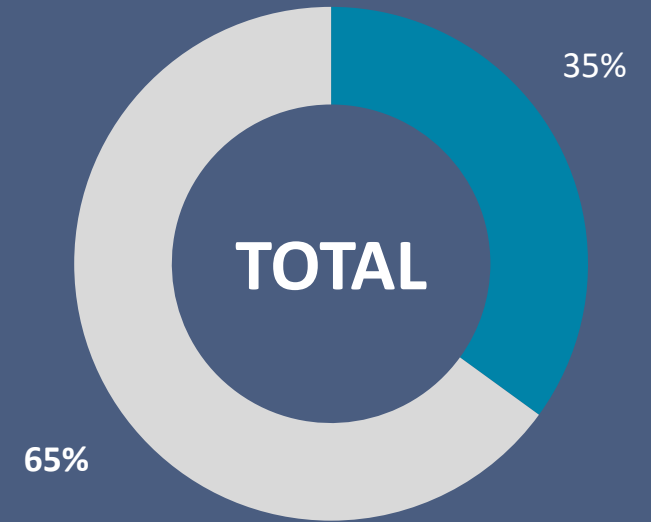
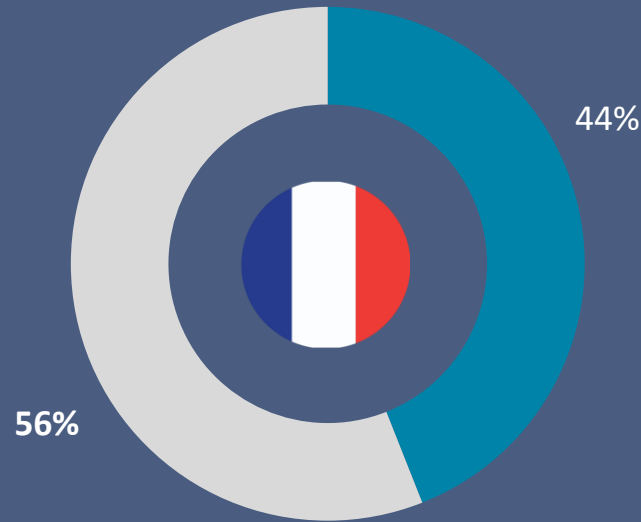
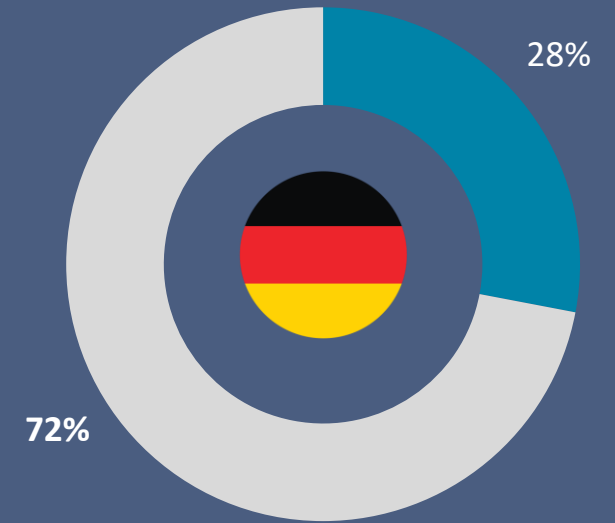
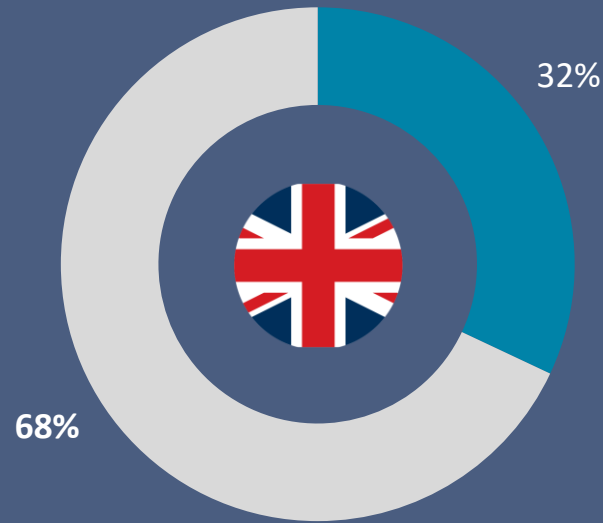


6 OUT OF 10 EUROPEAN TRAVELLERS STAYED IN HOTELS

French travellers are the least likely to stay in a hotel, and most likely to stay with family or in alternative accommodations while British and German travellers strongly prefer hotels

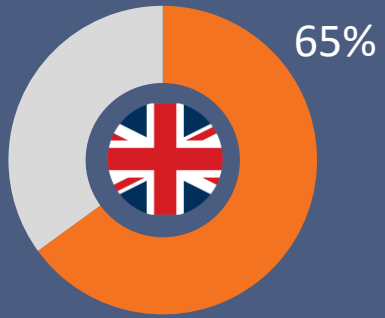
THE MAJORITY OF EUROPEANS TRAVEL OUTSIDE THEIR COUNTRY ON HOLIDAY

Germans were most likely to travel abroad, and the French were most closely divided between a holiday in the country or elsewhere

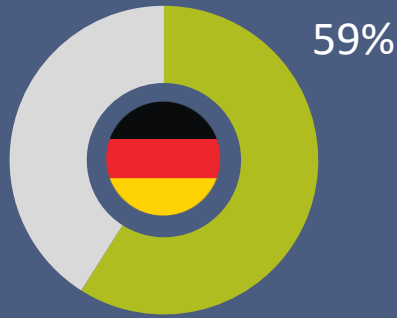


 In my country

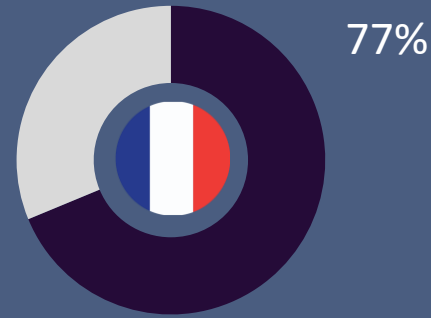
 Outside my country



Yes No



Yes No



Yes No

Proportion Spent On

Proportion Spent On

Proportion Spent On

BUDGET WAS A PRIMARY FACTOR FOR EUROPEAN TRAVELLERS – ESPECIALLY THE FRENCH

Lodging is a significant portion of the budget for each—especially for British and German travellers—with the only difference in the top five being German travellers budgeted more for attractions than transportation

Hotel	31%
Flight	20%
Food	16%
Transportation	10%
Attractions/Tours	10%
Shopping	7%
Alternative Accom.	3%
Other	3%

Hotel	31%
Flight	17%
Food	16%
Attractions/Tours	10%
Transportation	8%
Shopping	8%
Alternative Accom.	6%
Other	4%

Hotel	22%
Flight	18%
Food	16%
Transportation	12%
Attractions/Tours	11%
Shopping	9%
Alternative Accom.	7%
Other	4%

WHY EUROPEANS CHOOSE CERTAIN DESTINATIONS

WHEN ASKED WHICH CONSIDERATIONS WERE THE MOST IMPORTANT, ACTIVITIES RANKED THE HIGHEST FOR ALL THREE COUNTRIES



Activities I will be doing on my trip	189	194	191
A once in a lifetime experience	146	175	180
The cultural experience	166	156	149
Outdoor activities	111	149	146
Going somewhere I can take memorable photos	132	136	124
Lowest price	151	111	120
A place where I can vacation with friends	112	137	128
Feeling pampered during my vacation	89	165	115
Deals and/or special offers	151	101	116

BRITISH TRAVELLERS

tend to put more importance on price and deals than those in Germany and France and they also value cultural experiences the most

GERMAN TRAVELLERS

place a high importance on lifetime experiences, feeling pampered during their vacation, and having the opportunity to do outdoor activities

FRENCH TRAVELLERS

are similar to British and German travellers, however, they place a high importance on vacations with outdoor activities

WHEN ASKED TO PRIORITIZE, ACTIVITIES & EXPERIENCES RANKED SIGNIFICANTLY HIGHER

Price and deals are still important but not the most important in choosing a holiday

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=3003)

DETERMINING FACTORS FOR CHOOSING A DESTINATION

BRITISH TRAVELLERS

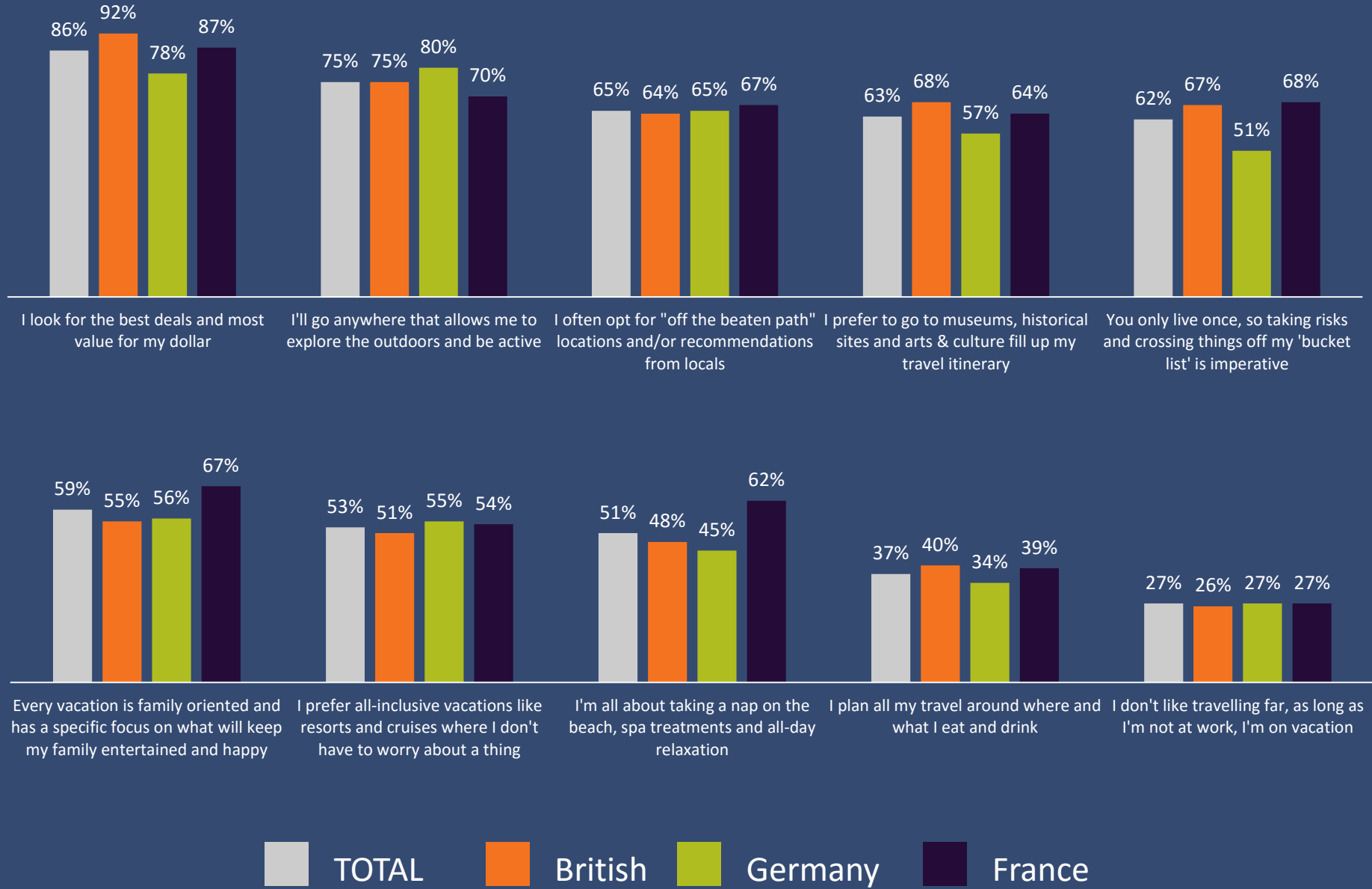
are most likely to look for the best deals and value

GERMAN TRAVELLERS

are most likely to go somewhere they can be outdoors and active

FRENCH TRAVELLERS

consider family entertainment in deciding on a destination more than other factors



HOW EUROPEANS BOOK TRAVEL

**FOR THE BELOW
STATEMENTS,
HERE ARE
DEVICES
EUROPEANS USE
TO COMPLETE
EACH TASK**

Europeans use their desktops and laptops for inspiration, researching, and booking travel; once on holiday, they use their smartphones more often

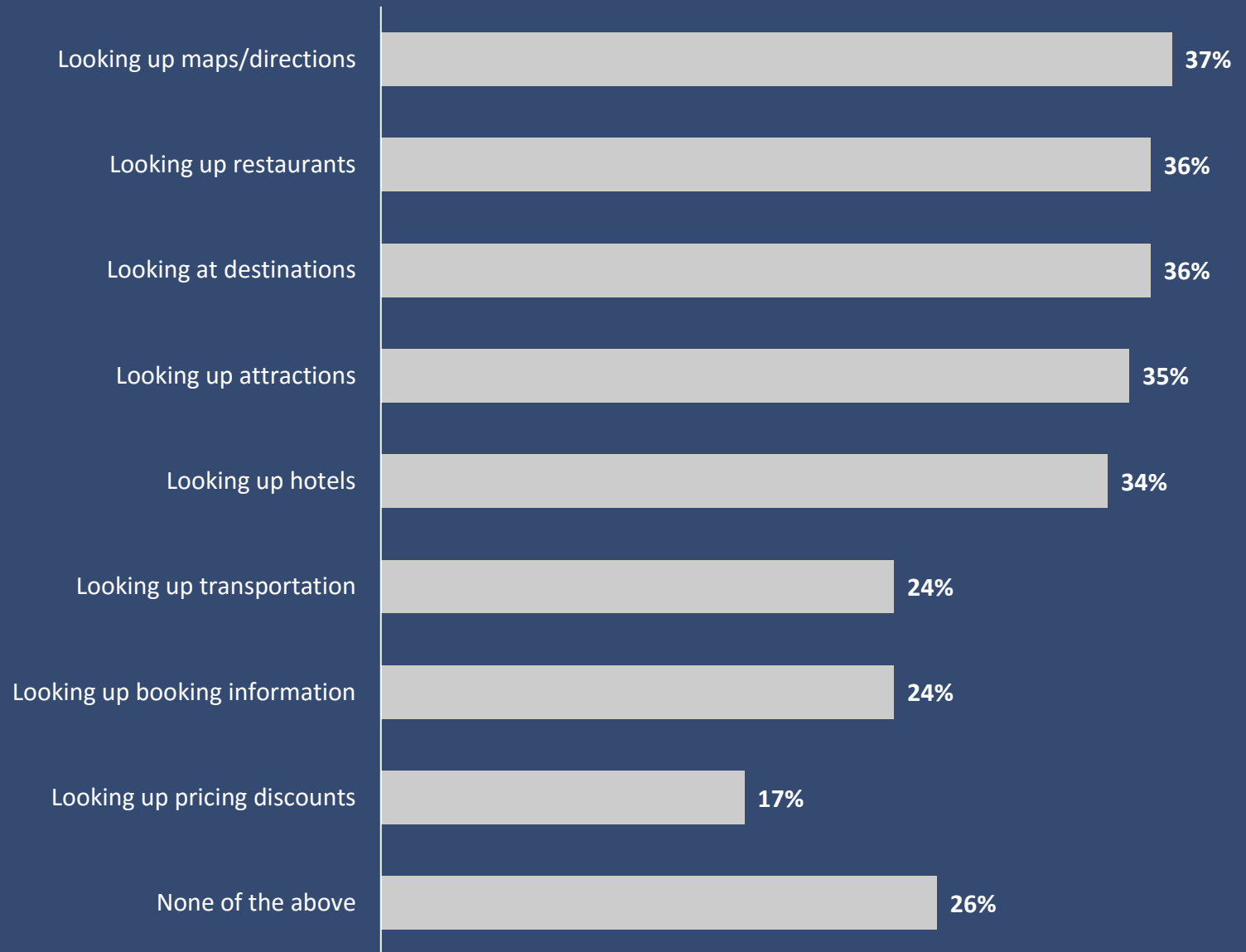


Smartphone Desktop/Laptop Tablet

When I'm looking for inspiration on where to travel	36%	75%	21%
When I'm researching on where to travel	24%	82%	21%
When I'm booking the travel	13%	87%	13%
During my trip	67%	31%	30%

WHAT ACTIVITIES DO YOU START ON ONE DEVICE AND FINISH ON ANOTHER

European travellers more often use their laptop/desktop for inspiration, researching, and booking travel but then they switch to their smartphones during their trip





WHY EUROPEANS TRAVEL

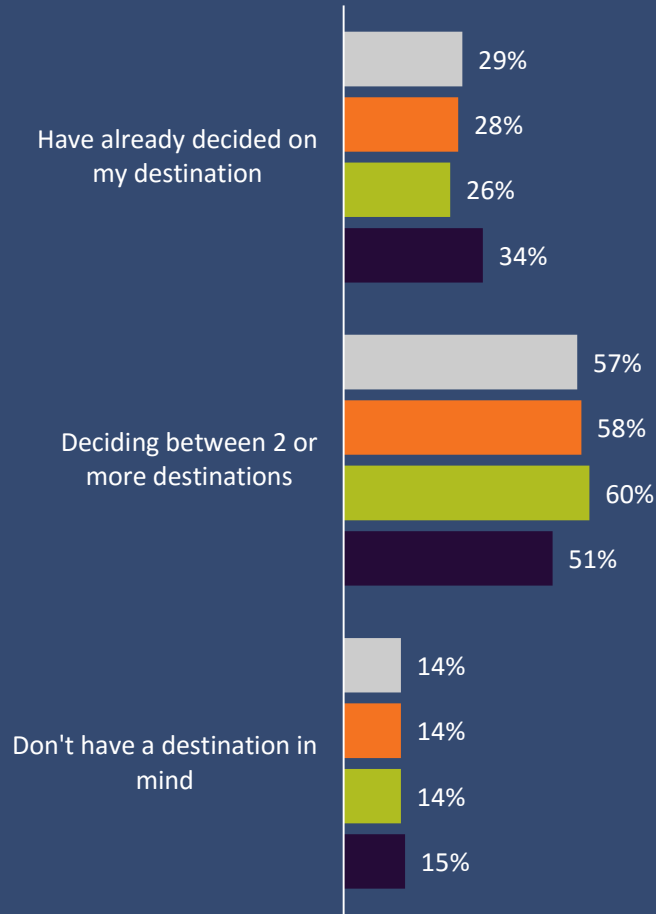
57% OF EUROPEANS ARE DECIDING BETWEEN 2 OR MORE DESTINATIONS

BRITISH TRAVELLERS are the most likely to seek help for inspiration for planning a trip

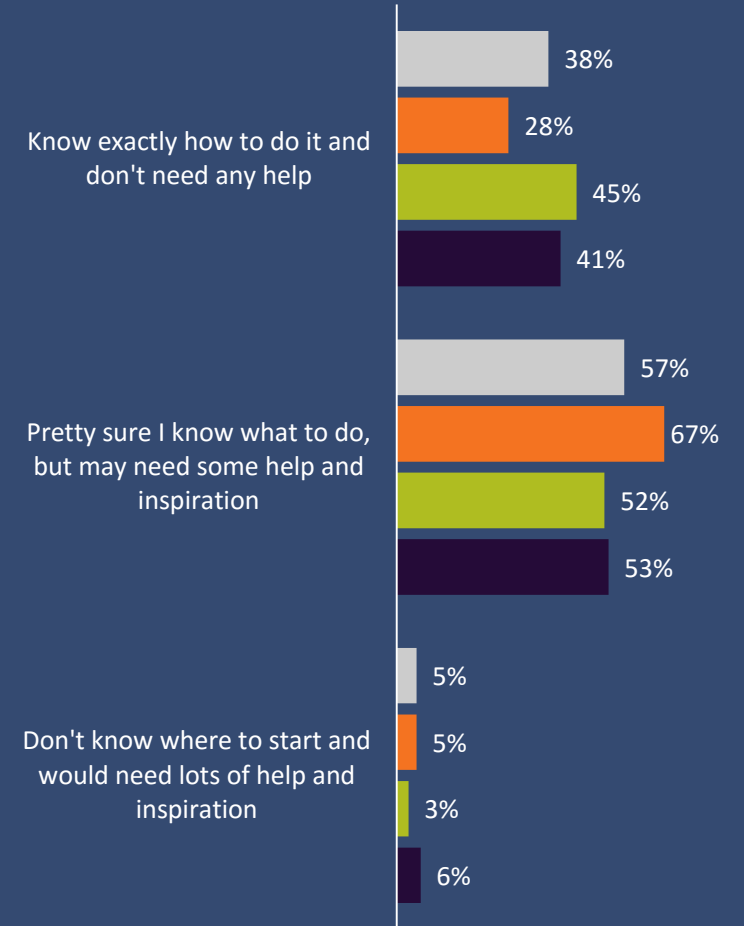
GERMAN TRAVELLERS are the most likely to know how they want to plan their trip

FRENCH TRAVELLERS are the most likely to already have decided on a destination when deciding to take a vacation

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
 British
 Germany
 France

EUROPEAN TRAVELLERS TAKE VACATION MOSTLY TO RELAX AND SIGHTSEE

BRITISH TRAVELLERS

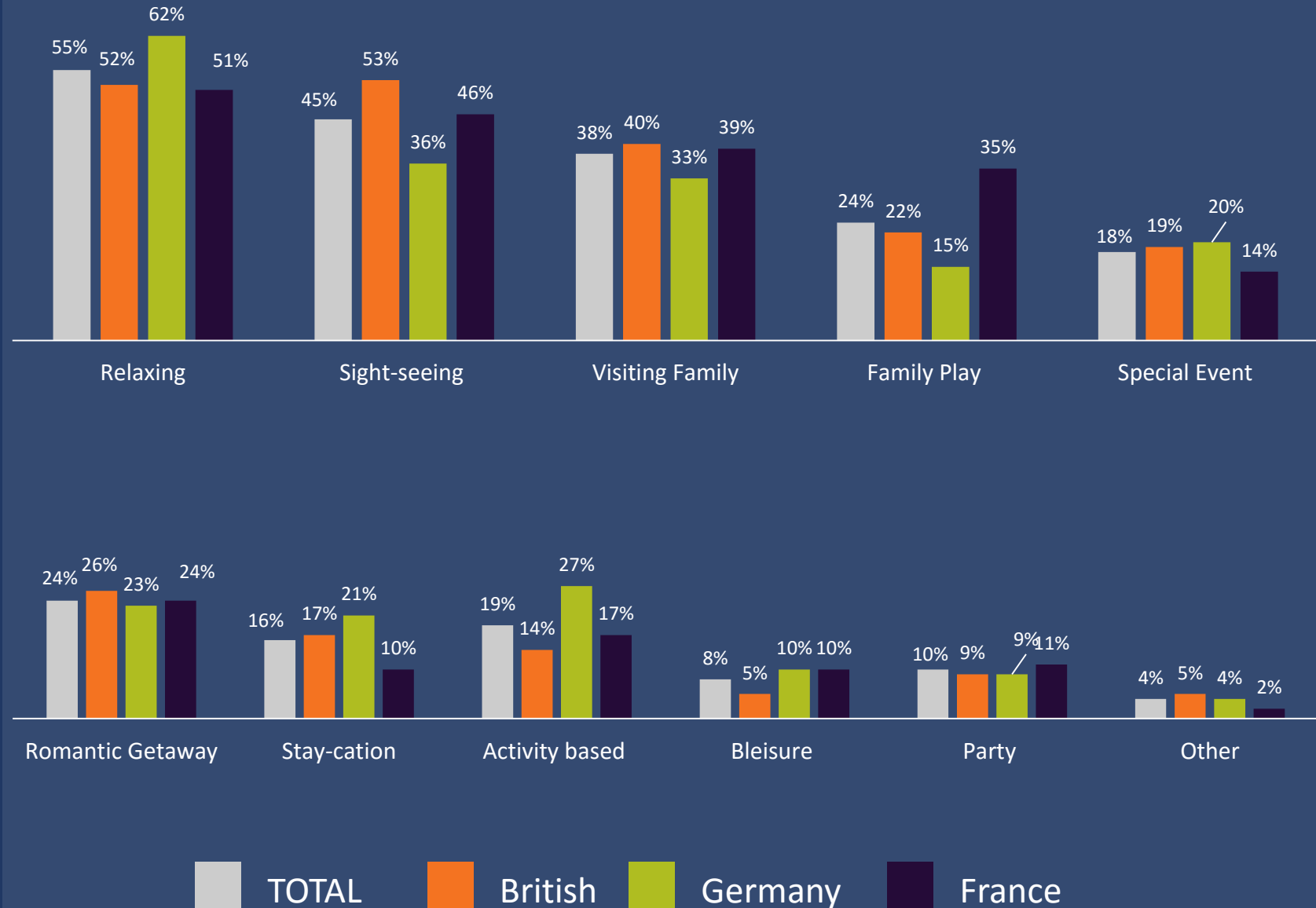
more often go on sight-seeing vacations

GERMAN TRAVELLERS

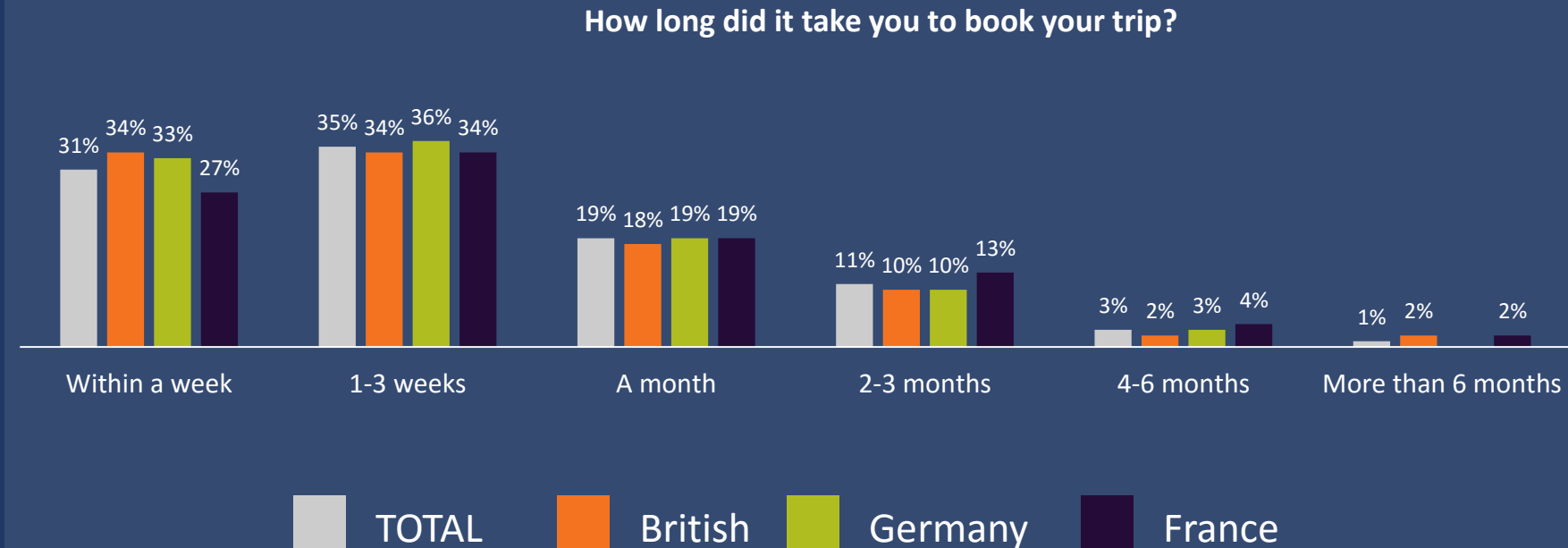
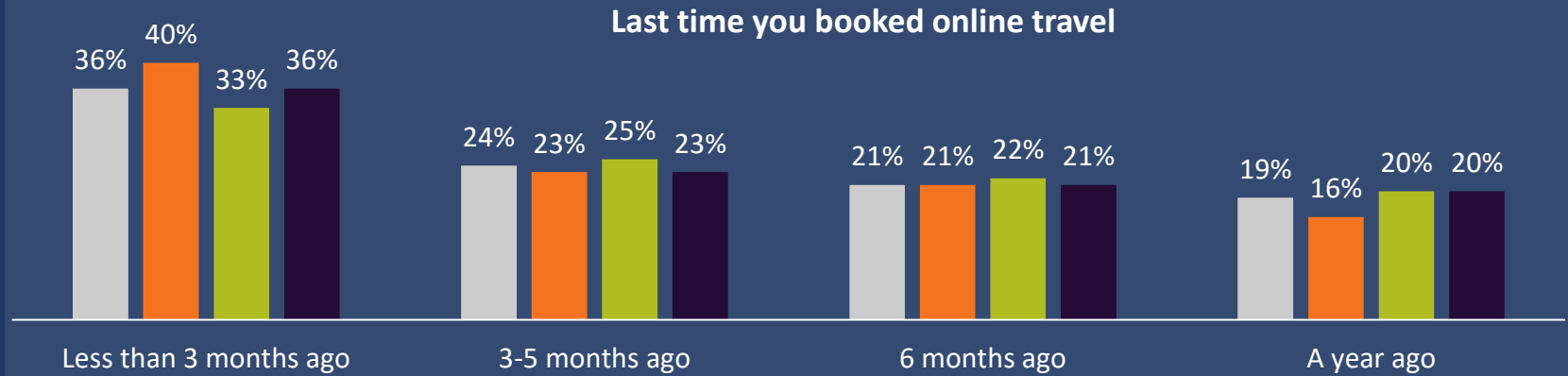
are more likely to seek relaxation and activities

FRENCH TRAVELLERS

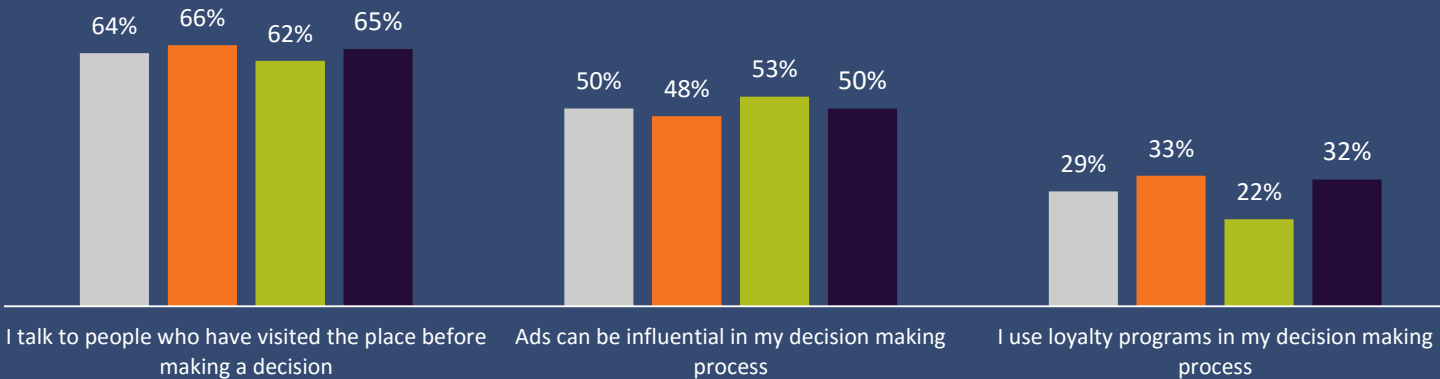
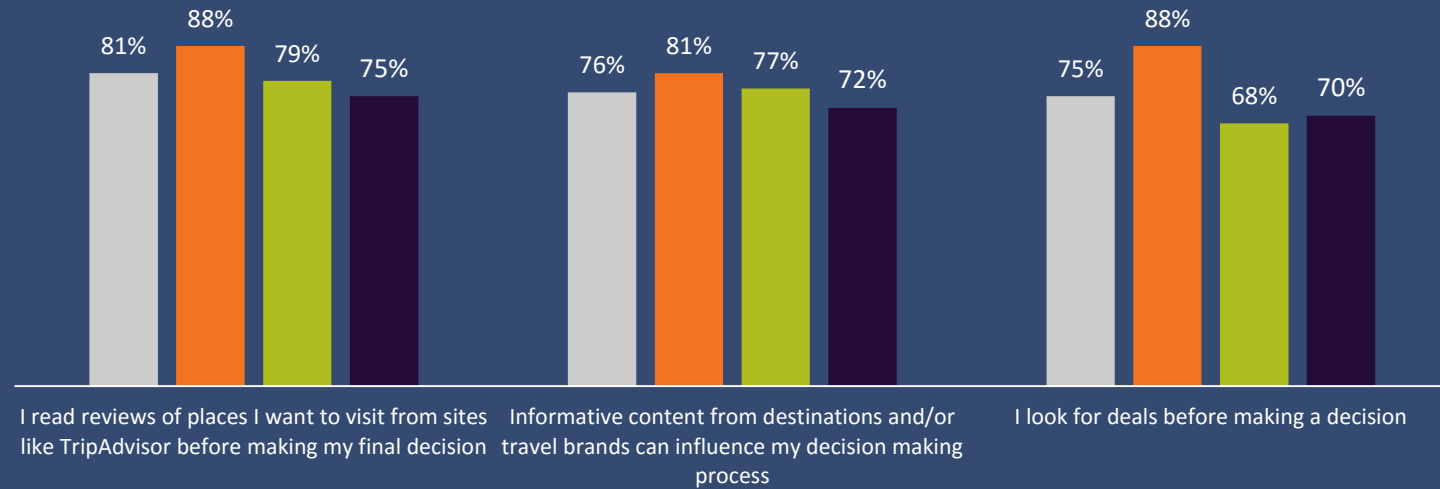
prefer visiting family and family fun more than the British or Germans



A LITTLE OVER A THIRD OF EUROPEANS HAVE TRAVELLED IN THE PAST THREE MONTHS WITH BRITISH TRAVELLERS HAVING TRAVELLED SLIGHTLY MORE IN THE PAST THREE MONTHS



WHEN ASKED ABOUT THE KEY INFLUENCERS IN THEIR DECISION MAKING PROCESS, HERE'S HOW EUROPEANS RESPONDED



TOTAL
 British
 Germany
 France

BRITISH TRAVELLERS

are the most likely to look for deals before making a decision, but they also find reviews and informative content persuasive

GERMAN TRAVELLERS

indicate that reviews of places and informative content can influence their decision making process followed by a slightly lower emphasis on deals

FRENCH TRAVELLERS

show a slight preference over German travellers for talking to people who have already visited a destination, but reviews of places are still the most persuasive

ADS INFLUENCE EUROPEANS DECISION MAKING PROCESS

BRITISH TRAVELLERS

are fairly evenly split between deals, imagery, and informative content

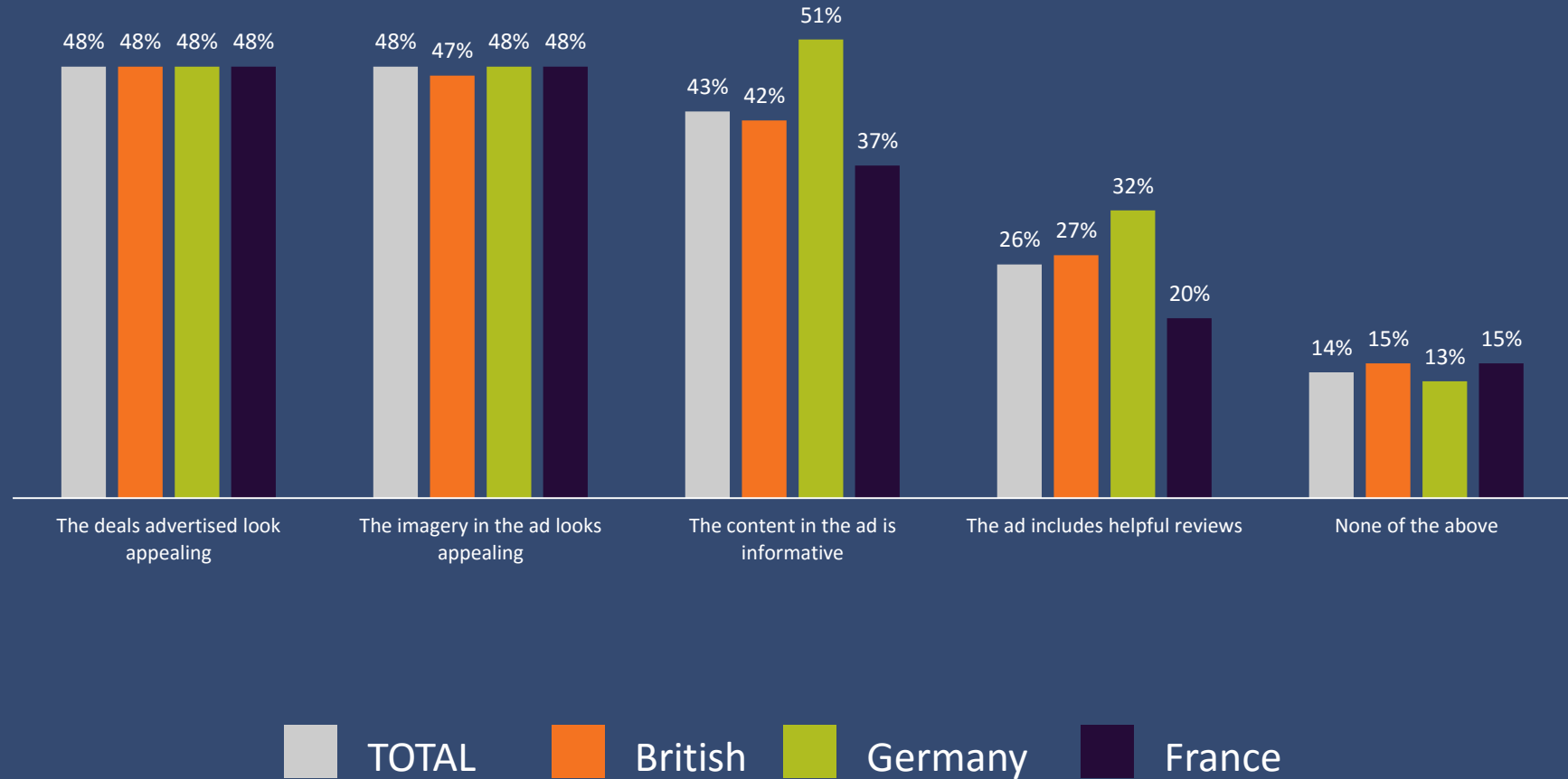
GERMAN TRAVELLERS

responded the best to content in advertising that is informative

FRENCH TRAVELLERS

respond equally well to ads that have appealing deals as to imagery that looks appealing

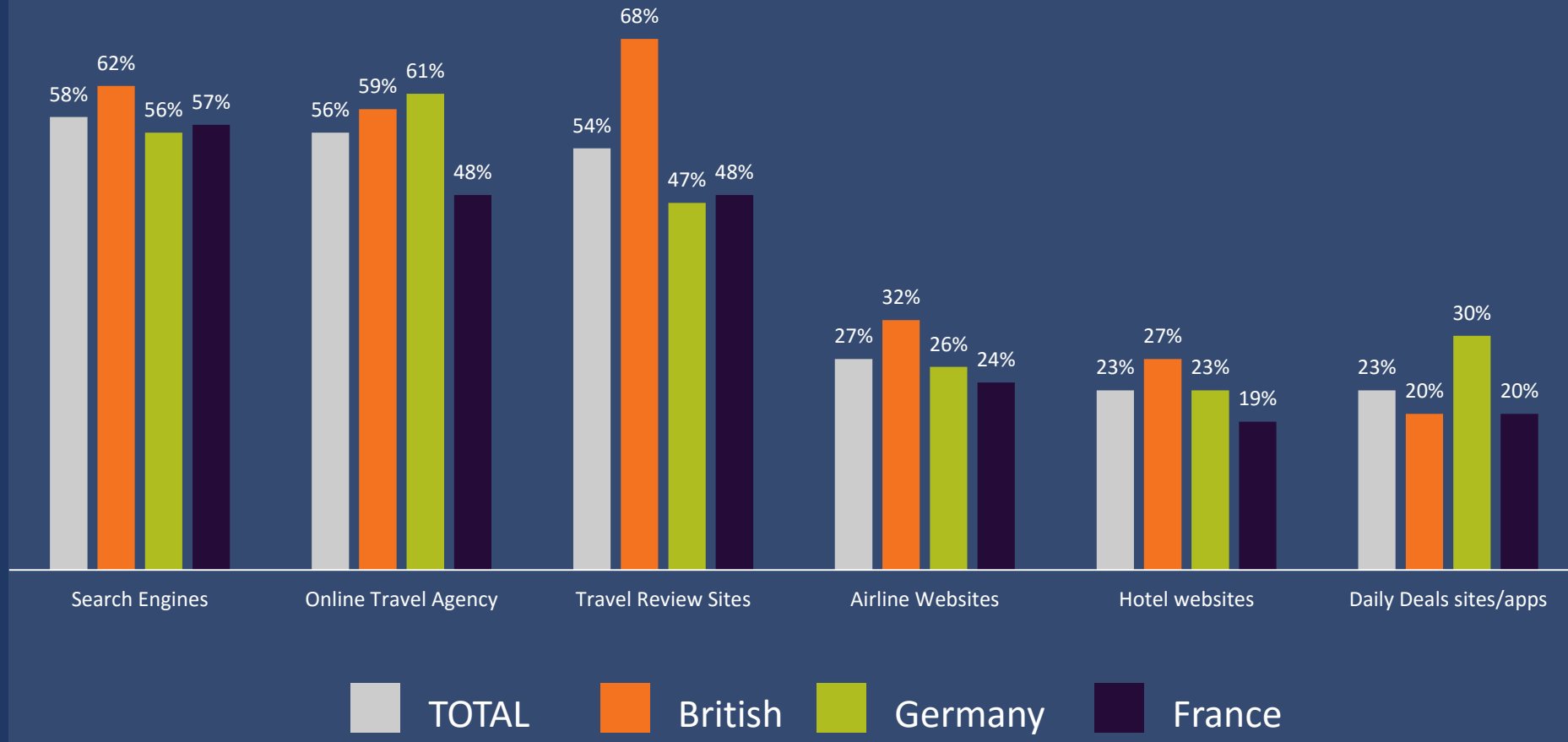
How can ads help influence in your decision making process?



INFLUENCERS OF TRAVEL BOOKING DECISION MAKING ONLINE

OTAs and search engines are the most influential channels when booking travel for Europeans

Online Sources that influence decision making in online booking



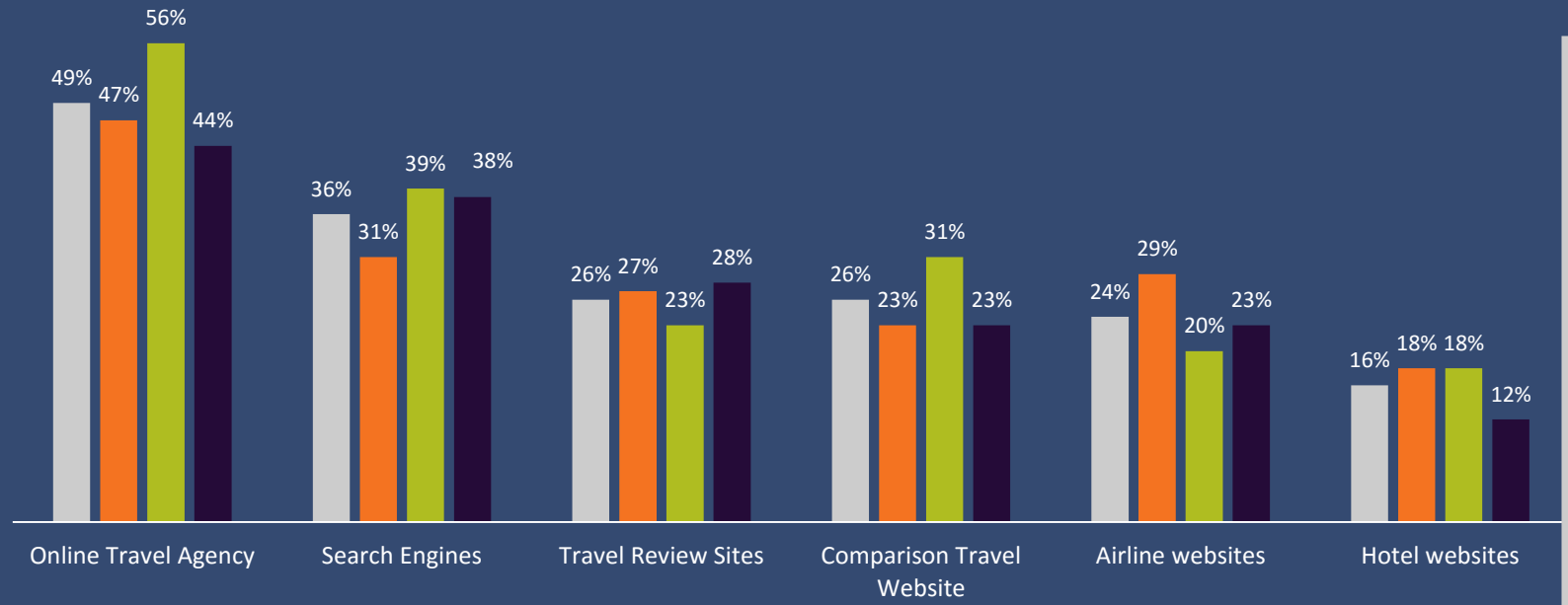
Q27: Which of the following online sources influence or inspire your decision making process in booking a trip?
 Q38: Please indicate which resources you used to book travel online on your last trip (Please select all that apply)
 Total (n=3003) British (n=1001) Germany (n=1000) France (n=1002)

OTAs ARE THE MAIN SOURCE EUROPEANS USE TO BOOK TRAVEL BY AN AVERAGE OF 13% OVER SEARCH ENGINES

OTAs rank number 1 for German, British, and French travellers for booking travel and are especially popular with German travellers



Online sources used to book travel on last trip



TOTAL
 British
 Germany
 France

Path To Booking Travel

KEY INSIGHTS FOR EUROPEANS

- ▶ The typical European traveller is deciding between two or more destinations
- ▶ OTAs are the main source for booking their travel
- ▶ They use their laptops/desktops extensively in the influence and research phase of the decision-making process—switching only to their phones once on vacation
- ▶ They consider deals and values important factors in their travel plans and they largely travel by plane, stay in hotels, travel internationally
- ▶ Activities and experiences are the most influential factors (outside of budget) in determining vacation plans
- ▶ Reviews and informative content influence travel plans and the main activities Europeans seek are sightseeing and relaxation

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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