



Consumer Travel Insights by STR

Traveller Journey Overview Report

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Background



The global travel industry continues to grow and transform as destinations expand and new technologies facilitate different approaches to travel. We have already seen impressive growth in tourism arrivals in 2018 with a 6% increase between January and June, according to the World Tourism Organisation. That growth path, therefore, looks set to eclipse the 5% projection made for 2018 by the UNWTO.

Tourism across the globe continues to be one of the fastest growing industries—in the U.K. alone, the sector now supports more than one in 10 jobs, according to VisitBritain. Tourism plays a vital role in the global economy and will be a key export and driver of inward investment for many developed and developing countries in 2019 and beyond. With this in mind, it is more important than ever for businesses, governments and other organisations to understand the travellers who make it all possible.



In this Consumer Travel Insight series, STR takes a deep dive into the traveller journey. Based on independent primary research conducted in 2018, we examined each stage of this journey—planning, booking, budgeting, and how technology and travel brands interact with travelling. This report series provides actionable intelligence to inform and drive tourism planning and decision making.

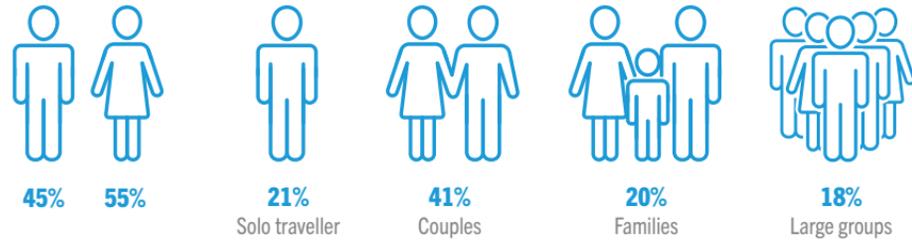


The research was conducted by STR's Tourism Consumer Insights team—our tourism and hospitality researchers and analysts, based in Edinburgh, Scotland. An online survey was conducted in October 2018 using STR's Traveller Panel—a unique community of approximately 28,000 engaged travellers from across the globe. Overall, 2,228 panellists took part in the research and were asked about their behaviour and experiences regarding their most recent international holiday. This covered how they interacted with certain travel brands and technology, how they planned and booked their holiday, and how the traveller's money was spent in a destination.

This report provides a high-level look at the vast insights gained from our study. As always, we welcome any queries or comments. We look forward to discussing the data with you in more detail and helping you with your data and decision making needs.

Traveller Profile

A total of 2,228 travellers who had been on an international leisure trip in the past 12 months were surveyed and reflected broad demographics, such as likelihood to travel and a range of holiday types.



In this report series, travellers between the ages of 16-34 are grouped together to form millennial travellers.

Average length of holiday: 13 nights



38% of holidays involved visiting multiple international destinations in the same trip



Frequent travellers (three or more international holidays per year): 29%

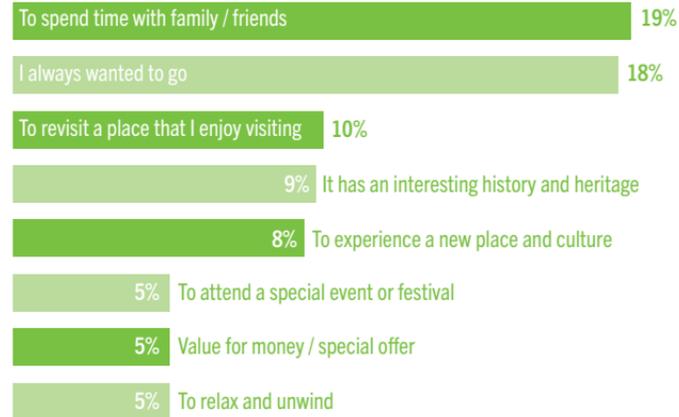


Infrequent travellers (one to two international holidays per year): 71%

Travel Planning and Motivations

Understanding travellers' thoughts before they have even decided to journey to a destination represents an important part of securing visitors. The information here can help businesses and organisations understand what factors travellers are considering as they decide on a destination and what they will do once they have arrived.

Most important reason for choosing a destination



We asked travellers what single reason was most important for their choice of destination, alongside more general motivations. The results highlight the importance of reputation in securing visitors for a destination, with destinations that people had always wanted to visit being the core reason for almost one in five travellers.

The importance of a positive previous experience in a destination cannot be overstated, with 10% of travellers saying it was the most significant reason for visiting. Ensuring that travellers have a positive experience should be an essential part of a destination's strategy to increase visitor numbers.

Special events and festivals offer an important draw for all types of destinations, with 5% of travellers citing them as their most important reason for travelling. This includes destinations that might not have the historical or cultural reputation of other locations.

When planning their holiday, travel makers keep core activities in mind, with culture and sightseeing at the top of their list. During the planning process, millennial travellers placed more importance on the need for rest and relaxation (3.95) than on ease of travel (3.81). This is in contrast to travellers over the age of 55 who ranked ease of travel at 4.08. This suggests that younger travellers are more willing to take on difficult journeys in order to realise their holiday ambitions.

Most important factors for planning a holiday (out of 5)

