



Consumer Travel Insights: Market Summary

Report prepared by STR

October 2020



Introduction

STR is pleased to provide you with this report to show our appreciation for your support and partnership.

The travel industry faces unprecedented challenges due to COVID-19. A 'new normal' now exists in which trends and strategies are re-written to adapt to a post COVID-19 world.

To help you understand existing behaviors and attitudes of English-speaking travelers and to assist in preparations and strategies for recovery, this report presents findings from data gathered among 2,409 travelers from Australia, Canada, U.K. and the U.S. in March and April 2020.

About This Report

This summary report evaluates and compares travel behaviors and attitudes among four English-speaking markets. The report contains the following sections for each market:

- **Profile**: Demographic insights and importance of social media and business on travel
- **Travel Habits & Plans**: Outbound destinations visited and existing and future travel plans
- **Travel Behaviors**: Motivations for traveling and who they travel with
- **Accommodation Preferences**: Preferred forms of accommodation for international and domestic trips

In addition, the report includes comparisons for each market to identify aspects which stand out among the audiences.



Contents



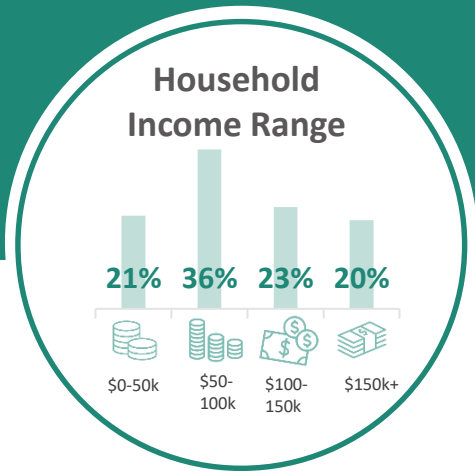
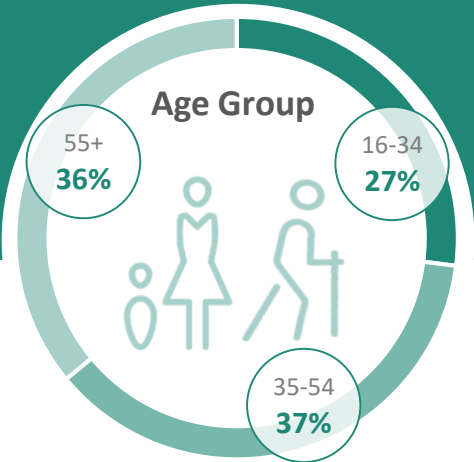


Australian Travelers



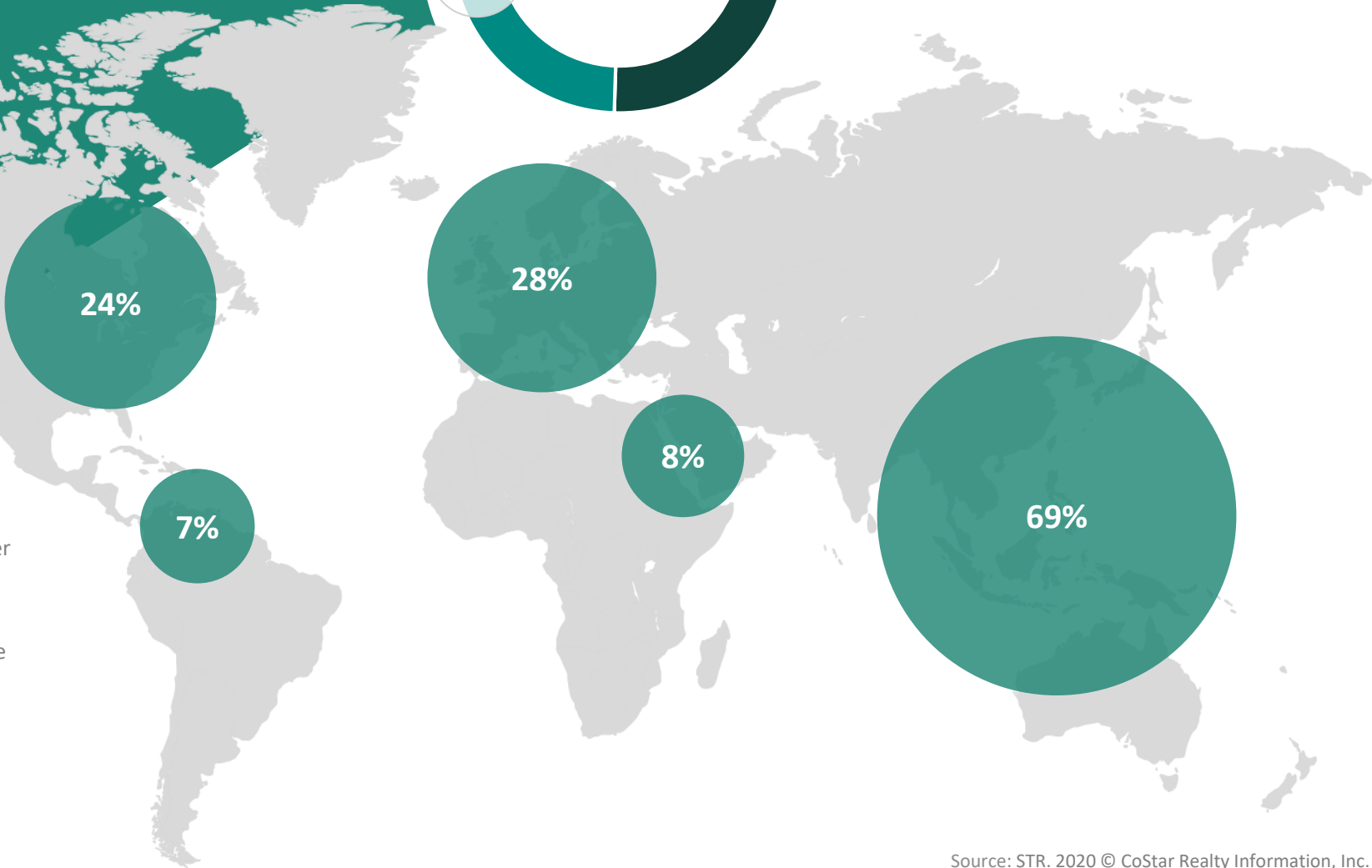
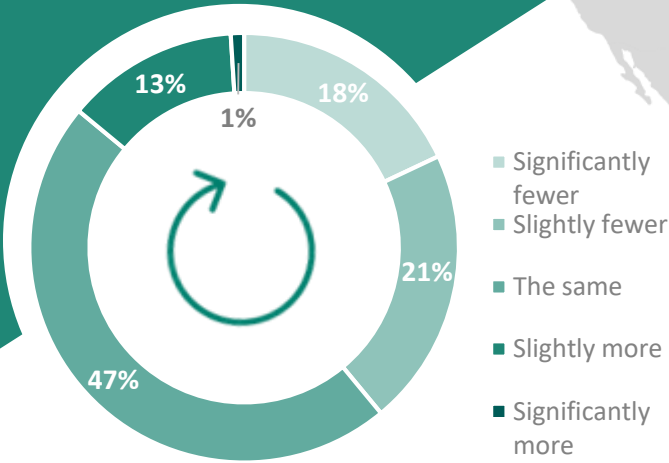
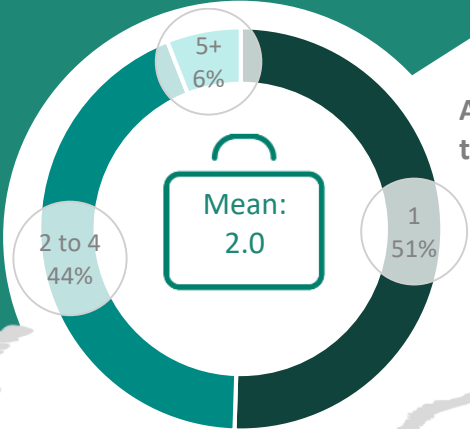
Profile

600 responses were achieved from international leisure travelers from Australia.



Income range in local currency.
See Appendix for question listing.

Travel Habits & Plans

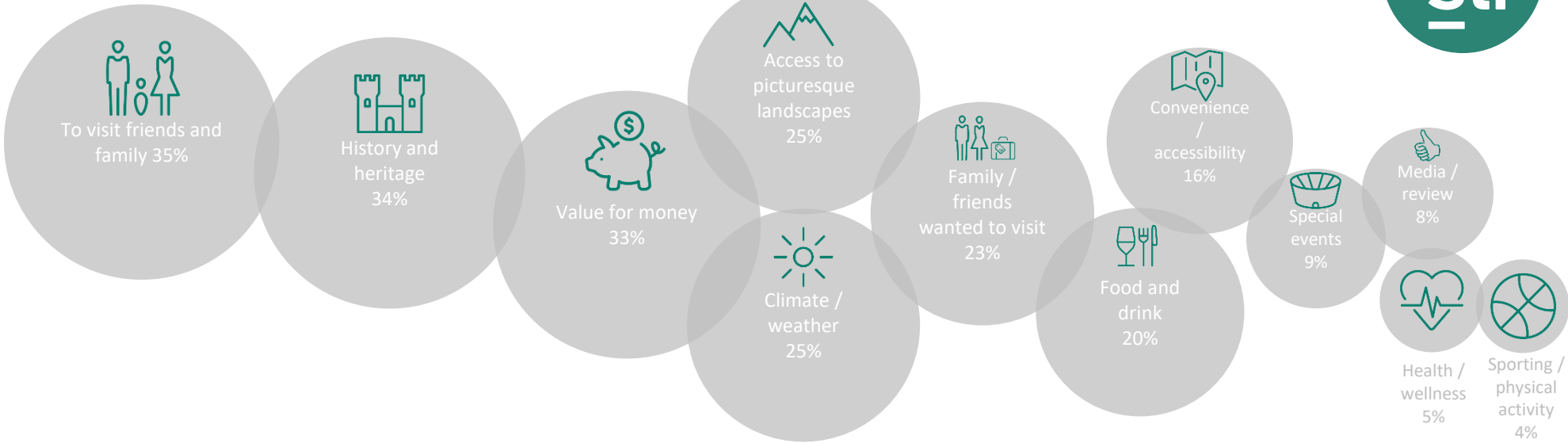


Q: Where have you travelled internationally for leisure in the past 12 months?



Travel Behaviors

Motivations to Visit Destination



Traveling Party

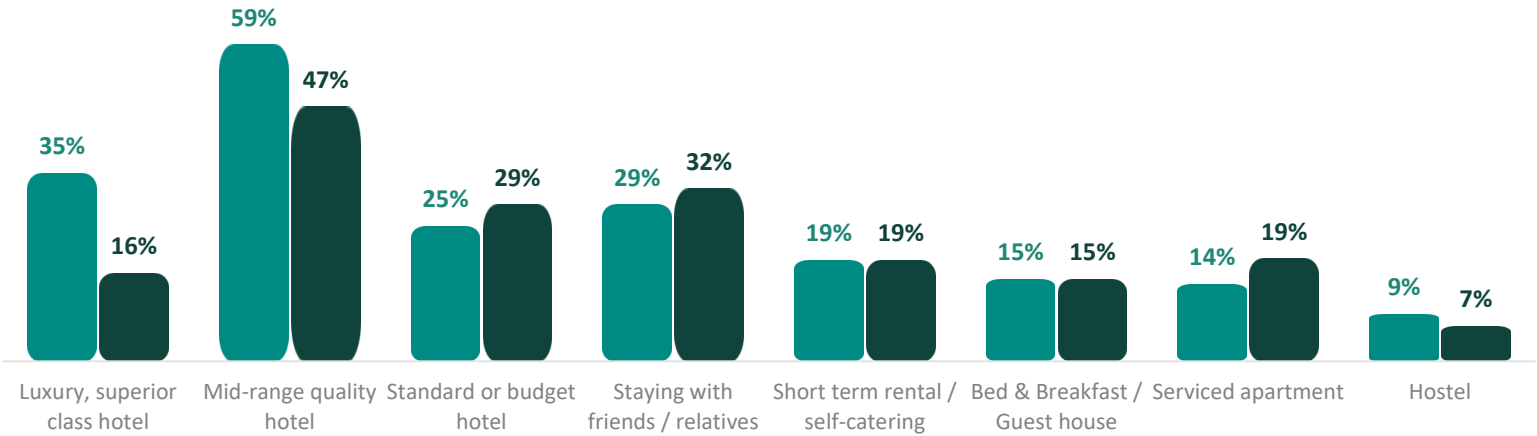


Accommodation Preferences



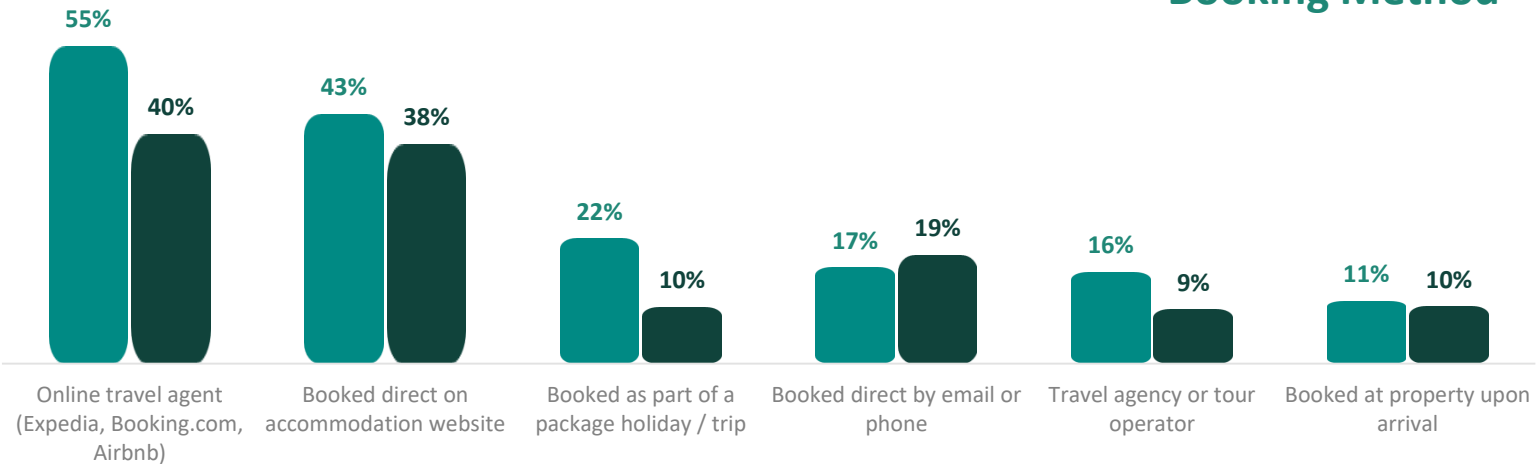
Domestic
Travel

Accommodation Used



International
Travel

Booking Method



Q. Thinking of all overnight leisure trips undertaken in the past 12 months, have you used any of the following types of accommodation?
Q. Still thinking of all overnight leisure trips undertaken in the past 12 months, what was the main method of booking your accommodation?

Australia vs. Other Markets

▲ At least 5% above average
▼ At least 5% below average

Significant differences ordered by magnitude (highest to lowest)

str

Profile of Travelers



Australian travelers had similar characteristics compared to the other travel markets in terms of:

- Gender
- Age group
- Social media influence
- Business travel

Accommodation Preferences

Thinking of all overnight leisure trips undertaken in the past 12 months, have you used any of the following types of accommodation?

Domestic: Mid-range quality hotel	59%	▲
Domestic: Staying with friends/relatives	32%	▲
International: Staying with friends/relatives	29%	▲
Domestic: Serviced apartment	19%	▲



International: Online travel agent 55% ▲

Domestic: Online travel agent 40% ▲

Still thinking of all overnight leisure trips undertaken in the past 12 months, what was the main method of booking your accommodation?

Travel Behaviors



Thinking of your international leisure trips in the past 12 months, which of the following were reasons for choosing to travel?

To visit friends/family	35%	▲
Value for money	33%	▲
Climate/weather	25%	▼
Convenience/accessibility of destination	16%	▲

Travel Habits & Plans

Asia Pacific	69%	▲
Europe and Russia	28%	▼
North America	24%	▼
Central and South America	7%	▼

Where have you travelled internationally for leisure in the past 12 months?



Average number of international trips in the past 12 months 2.0 Trips ▼

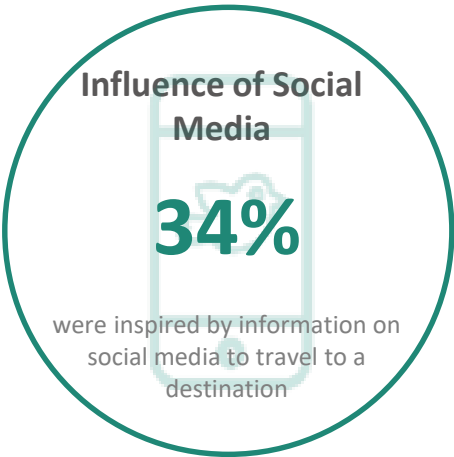
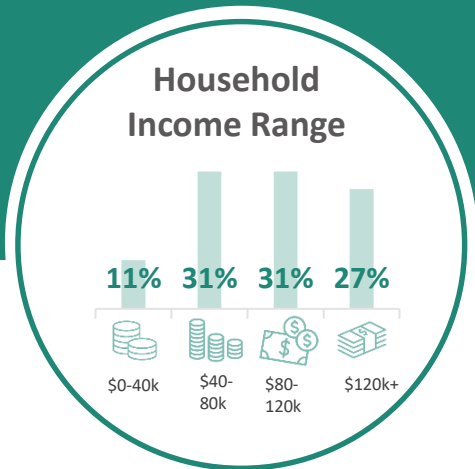
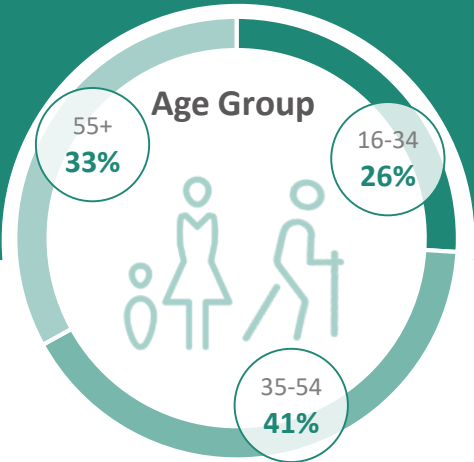
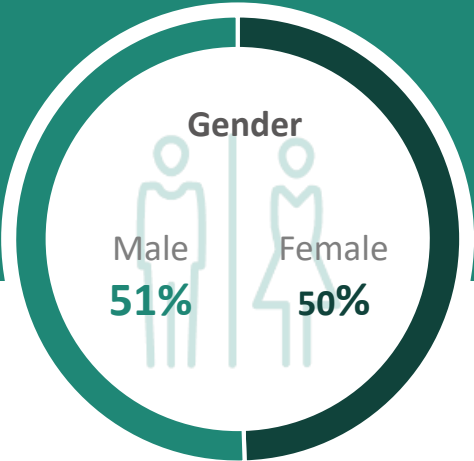


Canadian Travelers

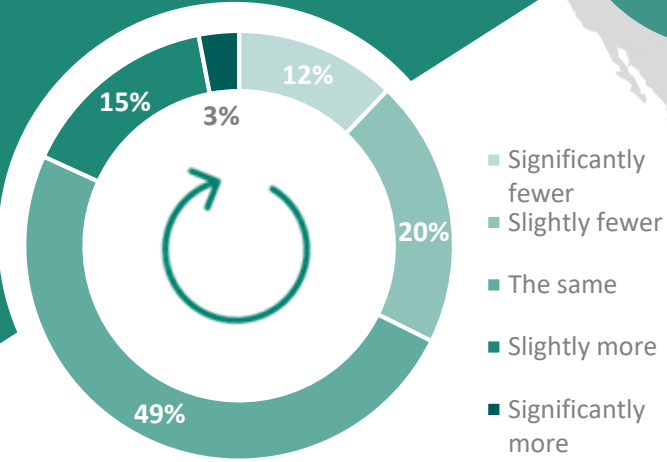
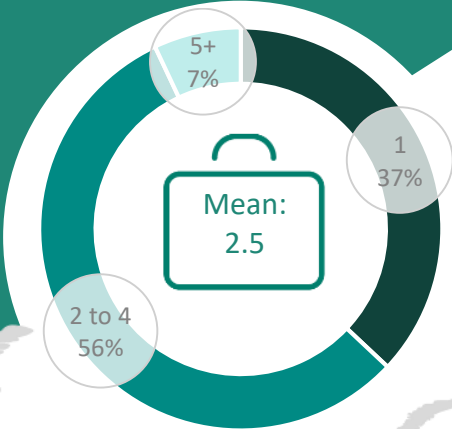


Profile

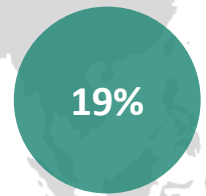
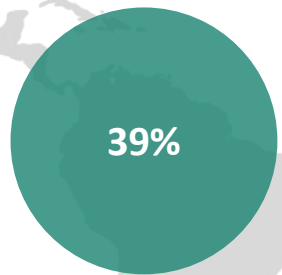
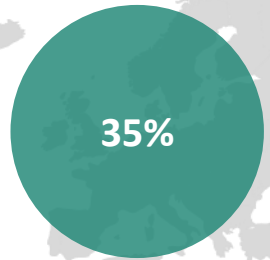
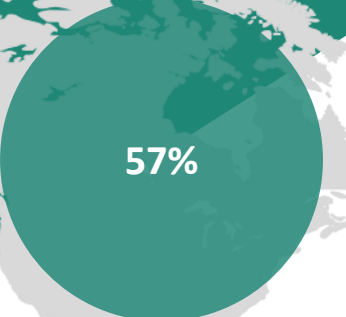
605 responses were achieved from international leisure travelers from Canada.



Travel Habits & Plans



- Significantly fewer
- Slightly fewer
- The same
- Slightly more
- Significantly more



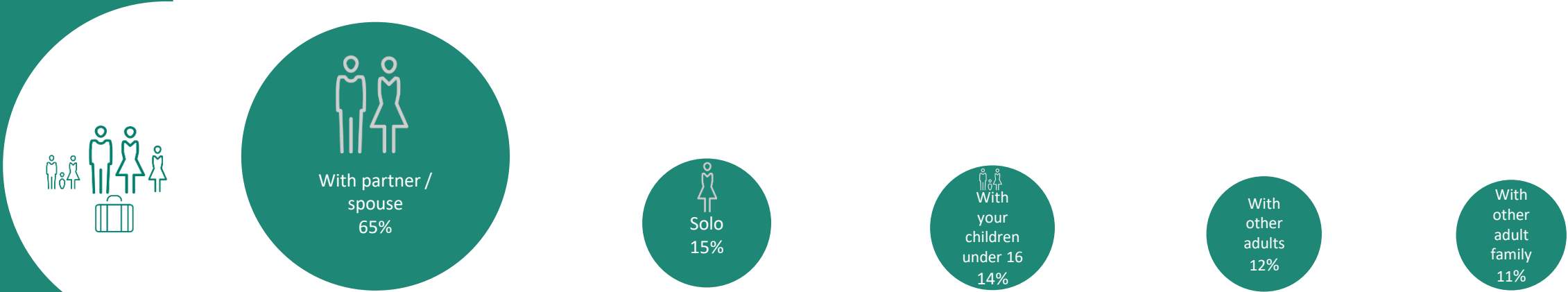
Q: Where have you travelled internationally for leisure in the past 12 months?

Travel Behaviors

Motivations to Visit Destination



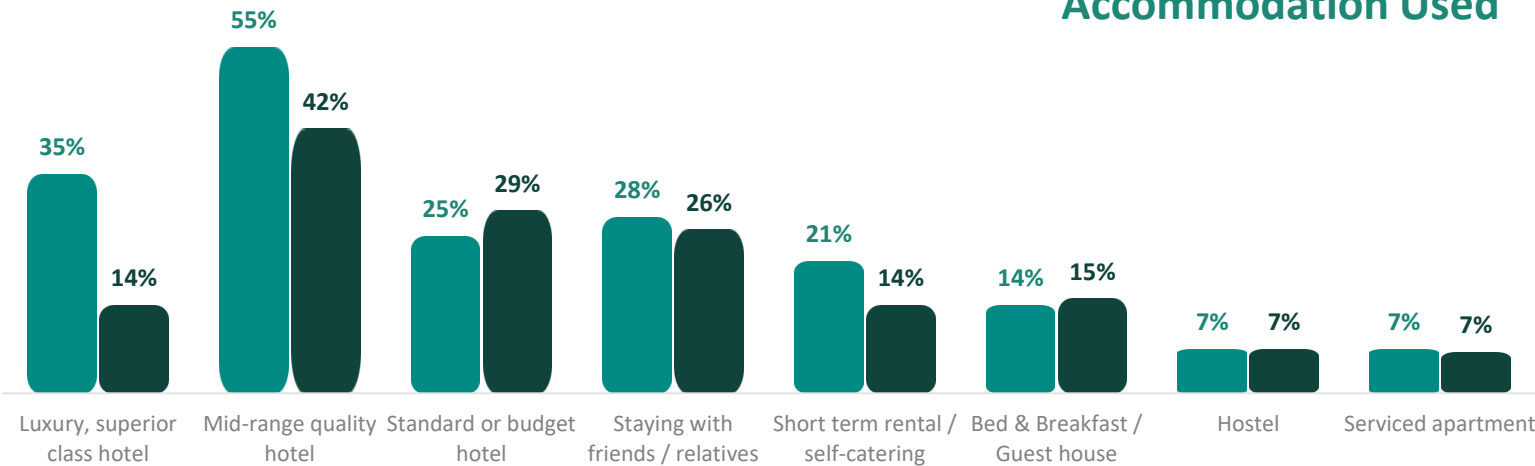
Traveling Party



Accommodation Preferences



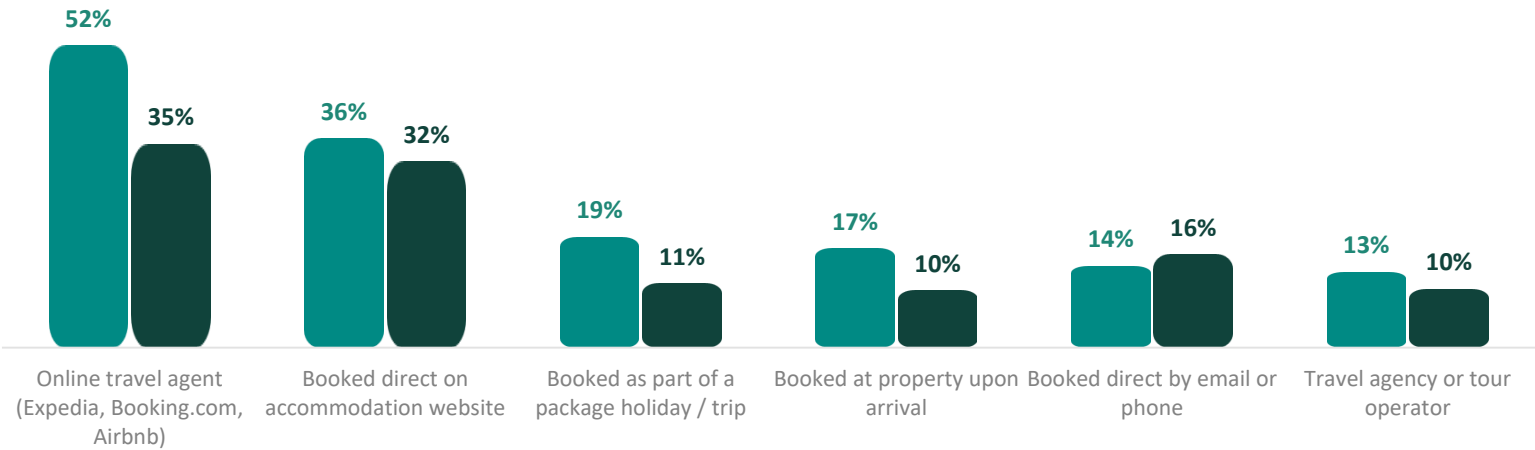
Accommodation Used



Domestic Travel

International Travel

Booking Method



Q. Thinking of all overnight leisure trips undertaken in the past 12 months, have you used any of the following types of accommodation?
Q. Still thinking of all overnight leisure trips undertaken in the past 12 months, what was the main method of booking your accommodation?

Canada vs. Other Markets

▲ At least 5% above average
▼ At least 5% below average

Significant differences ordered by magnitude (highest to lowest)

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Profile of Travelers



Canadian travelers had similar characteristics compared to the other travel markets in terms of:

- Gender
- Age group
- Business travel

Canadian travelers differed when it came to:

Social media influence 34% ▲

Accommodation Preferences

Thinking of all overnight leisure trips undertaken in the past 12 months, have you used any of the following types of accommodation?

Domestic: Mid range hotel 42% ▼

International: Online travel agent 53% ▲

International: Booking direct on accommodation providers website 36% ▼

Domestic: Booking direct on accommodation providers website 32% ▼

Still thinking of all overnight leisure trips undertaken in the past 12 months, what was the main method of booking your accommodation?



Travel Behaviors



Thinking of your international leisure trips in the past 12 months, which of the following were reasons for choosing to travel?

Climate/weather 43% ▲

History and heritage 29% ▼

Travel Habits & Plans

North America 57% ▲

Central and South America 39% ▲

Europe and Russia 35% ▼

Asia Pacific 19% ▼

Where have you travelled internationally for leisure in the past 12 months?

Average number of international trips in the past 12 months 2.5 Trips ▲



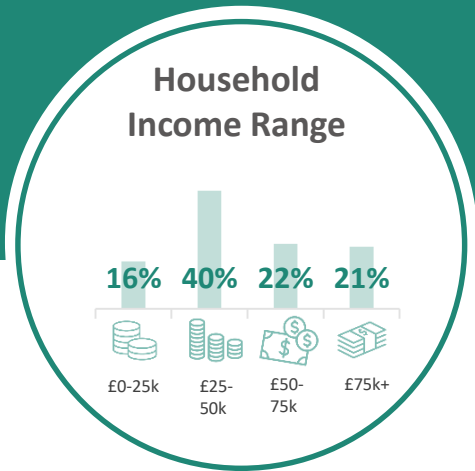
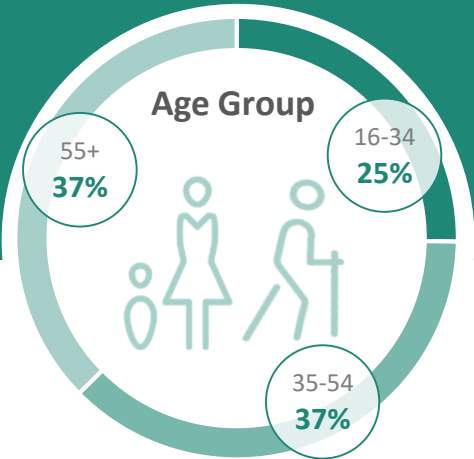
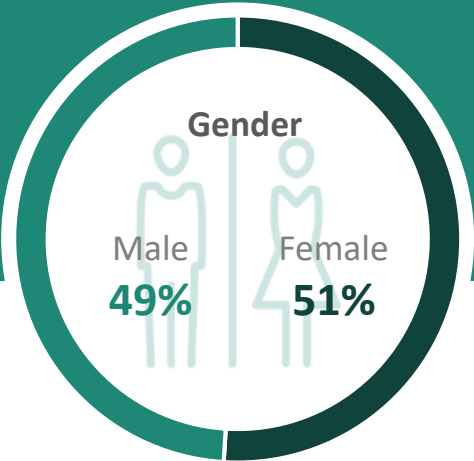


U.K. Travelers

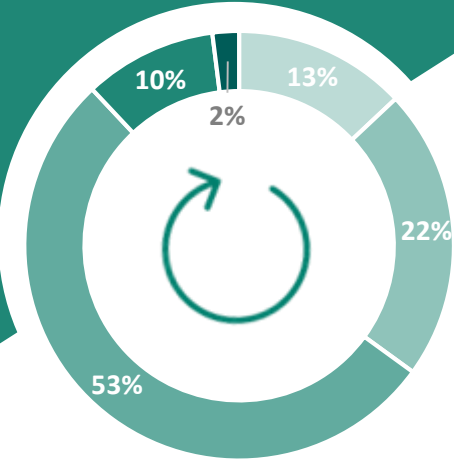
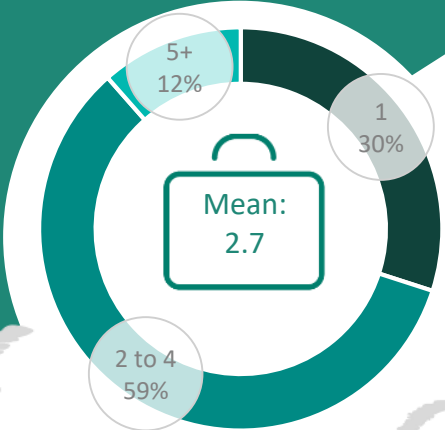


Profile

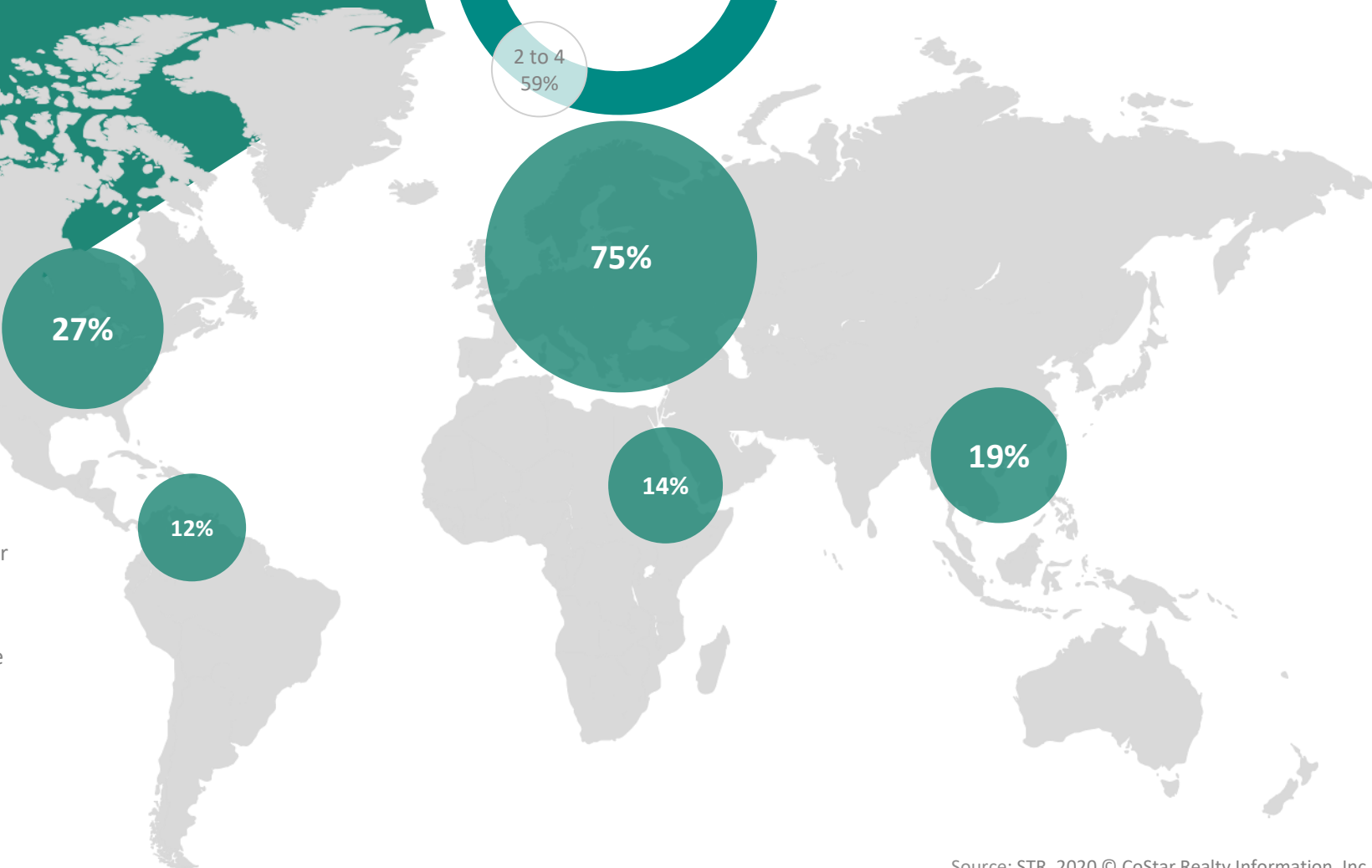
602 responses were achieved from international leisure travelers from the U.K.



Travel Habits & Plans



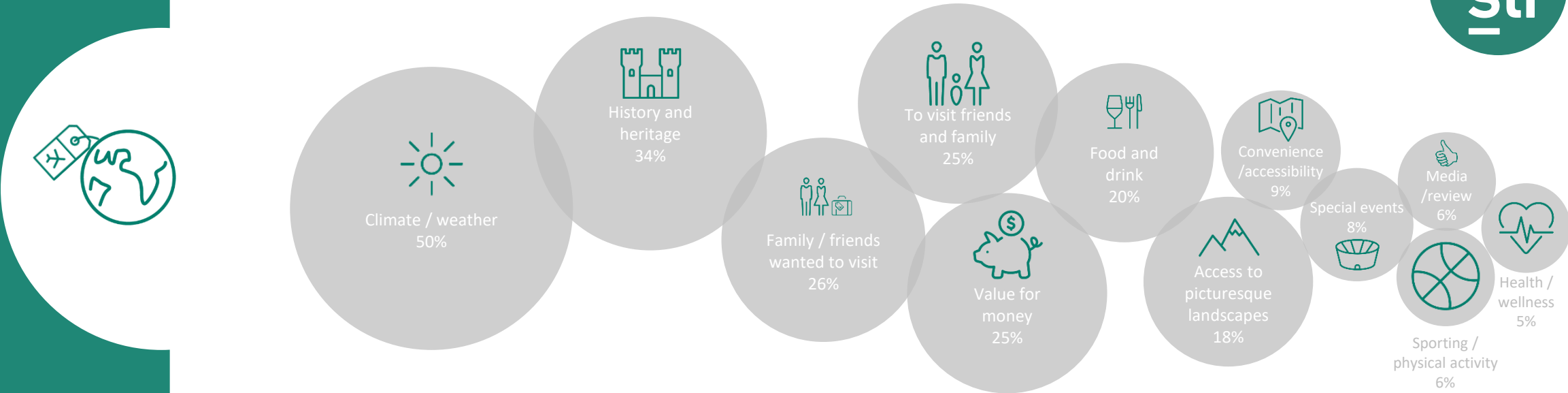
- Significantly fewer
- Slightly fewer
- The same
- Slightly more
- Significantly more



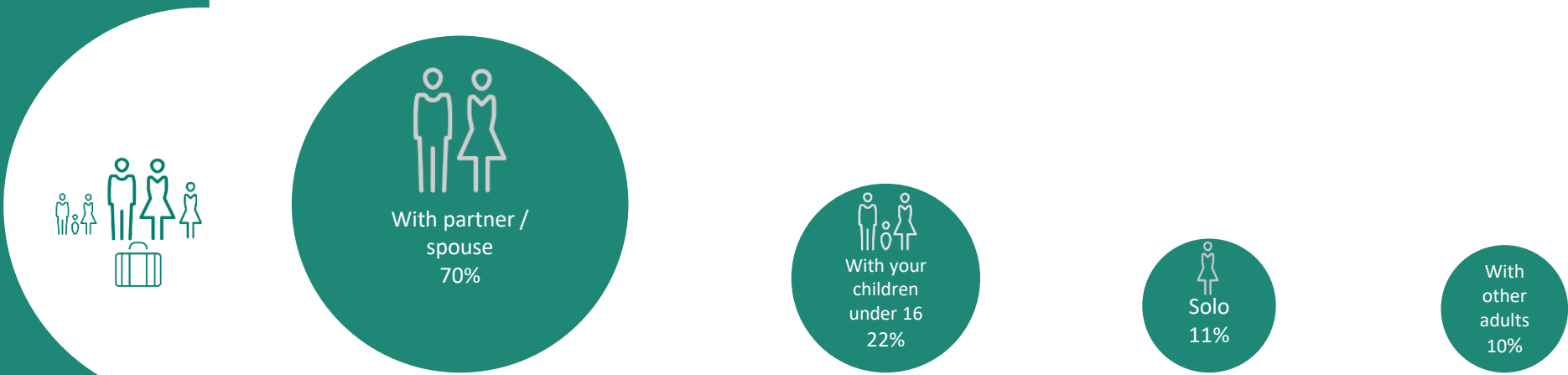
Q: Where have you travelled internationally for leisure in the past 12 months?

Travel Behaviors

Motivations to Visit Destination



Traveling Party



Q. Thinking of your international leisure trips in the past 12 months, which, if any, of the following were reasons for choosing to travel?

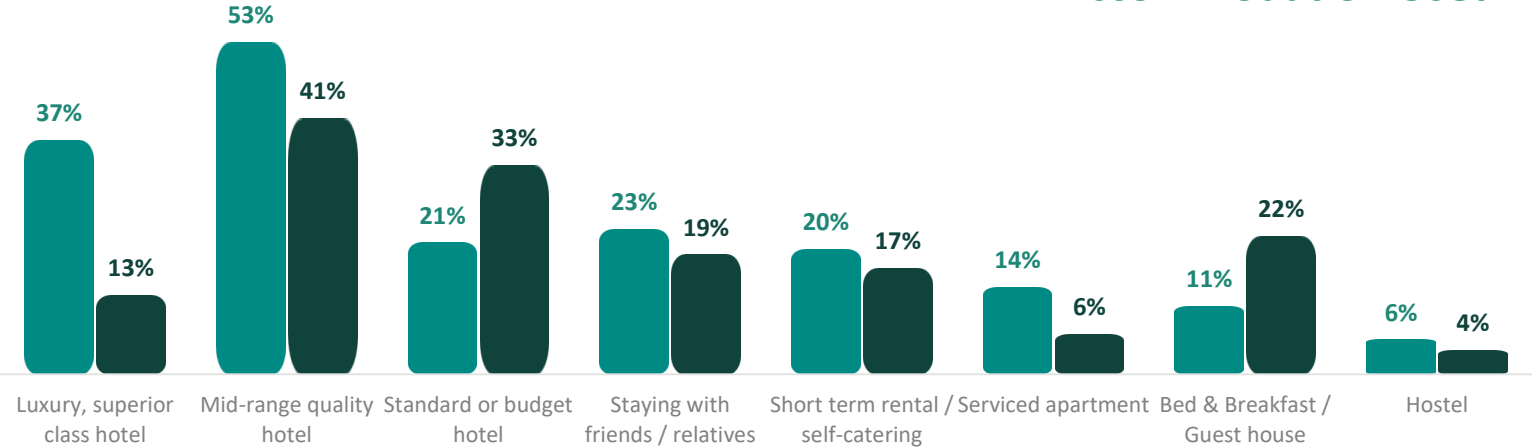
Q. Still thinking of your international leisure trips in the past 12 months, who did you travel with most regularly?

Accommodation Preferences



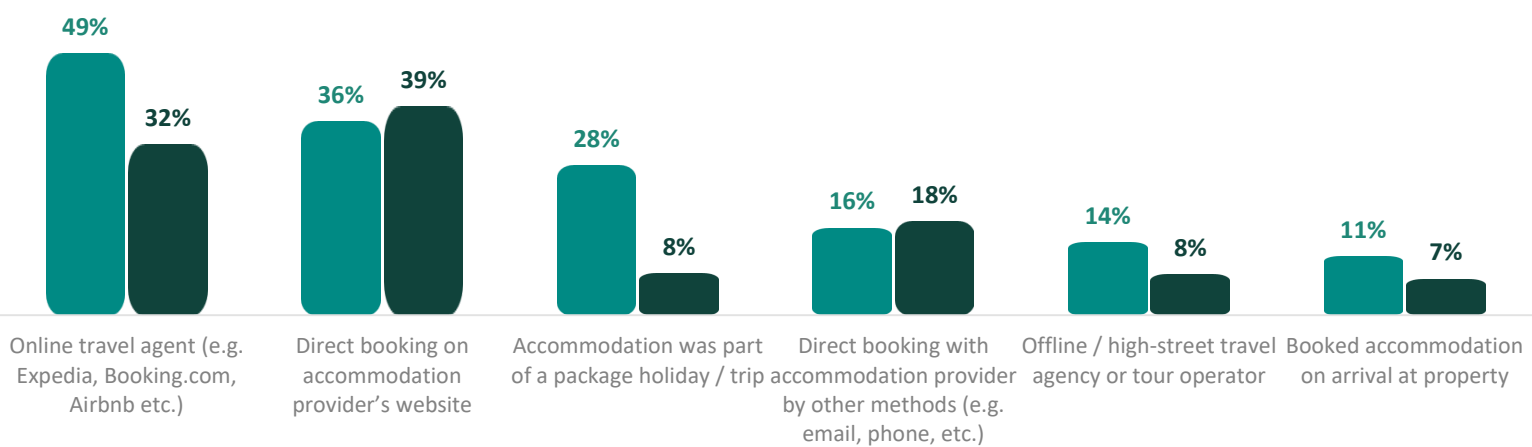
Domestic
Travel

Accommodation Used



International
Travel

Booking Method



Q. Thinking of all overnight leisure trips undertaken in the past 12 months, have you used any of the following types of accommodation?
Q. Still thinking of all overnight leisure trips undertaken in the past 12 months, what was the main method of booking your accommodation?

U.K. vs. Other Markets

▲ At least 5% above average

▼ At least 5% below average

Significant differences ordered by magnitude (highest to lowest)

str

Profile of Travelers

British travelers had similar characteristics compared to the other travel markets in terms of:

- Gender
- Age group
- Business travel

British travelers differed when it came to:

Social media influence 26% ▼



Thinking of all overnight leisure trips undertaken in the past 12 months, have you used any of the following types of accommodation?

International: As part of a package holiday

28%



Accommodation Preferences

Domestic: Mid-range quality hotel

41%



Domestic: Bed and Breakfast / Guest House

22%



Domestic: Staying with friends/relatives

19%



Domestic: Serviced apartment

6%



Still thinking of all overnight leisure trips undertaken in the past 12 months, what was the main method of booking your accommodation?



Travel Behaviors

Thinking of your international leisure trips in the past 12 months, which of the following were reasons for choosing to travel?

Climate/weather

50%



Travel Habits & Plans

Europe and Russia

75%



North America

27%



Asia Pacific

19%



Middle East and Africa

14%



Central and South America

12%



Average number of international trips in the past 12 months

2.7 Trips



Where have you travelled internationally for leisure in the past 12 months?



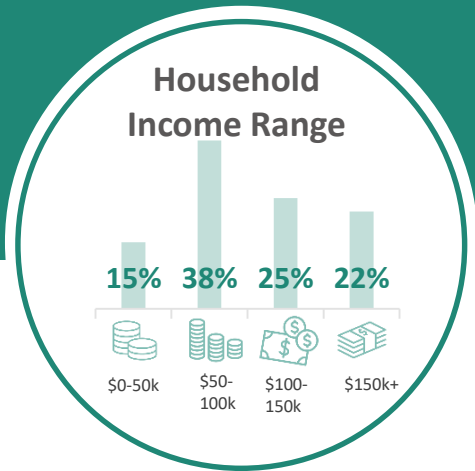
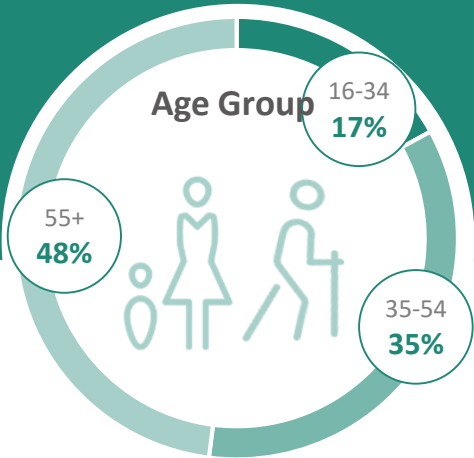


U.S. Travelers



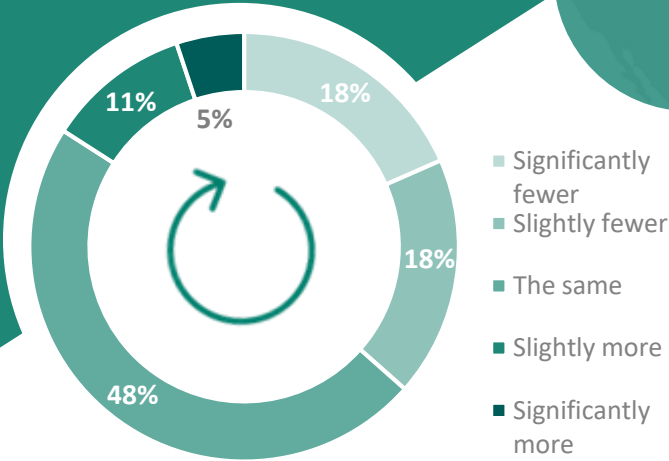
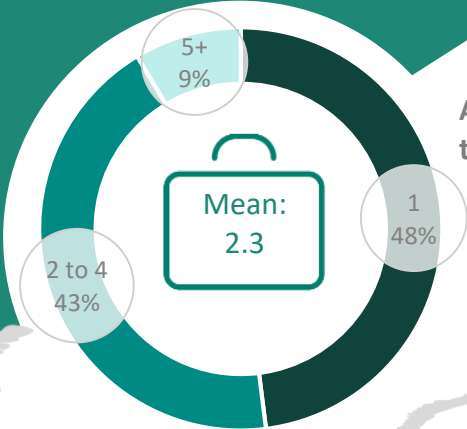
Profile

602 responses were achieved from international leisure travelers from the U.S.

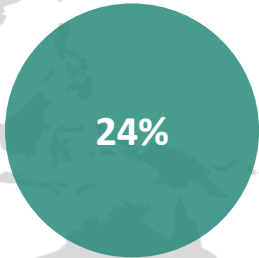
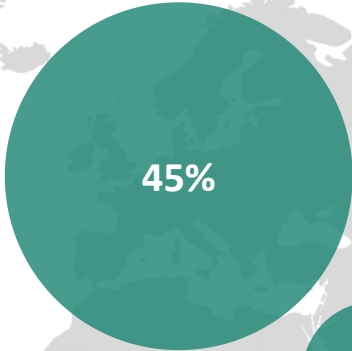
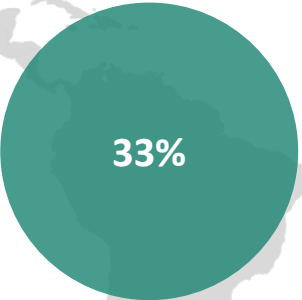
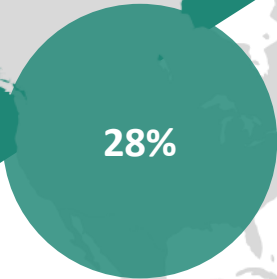


Income range in local currency.
See Appendix for question listing.

Travel Habits & Plans



- Significantly fewer
- Slightly fewer
- The same
- Slightly more
- Significantly more



Q: Where have you travelled internationally for leisure in the past 12 months?

Travel Behaviors

Motivations to Visit Destination



Traveling Party

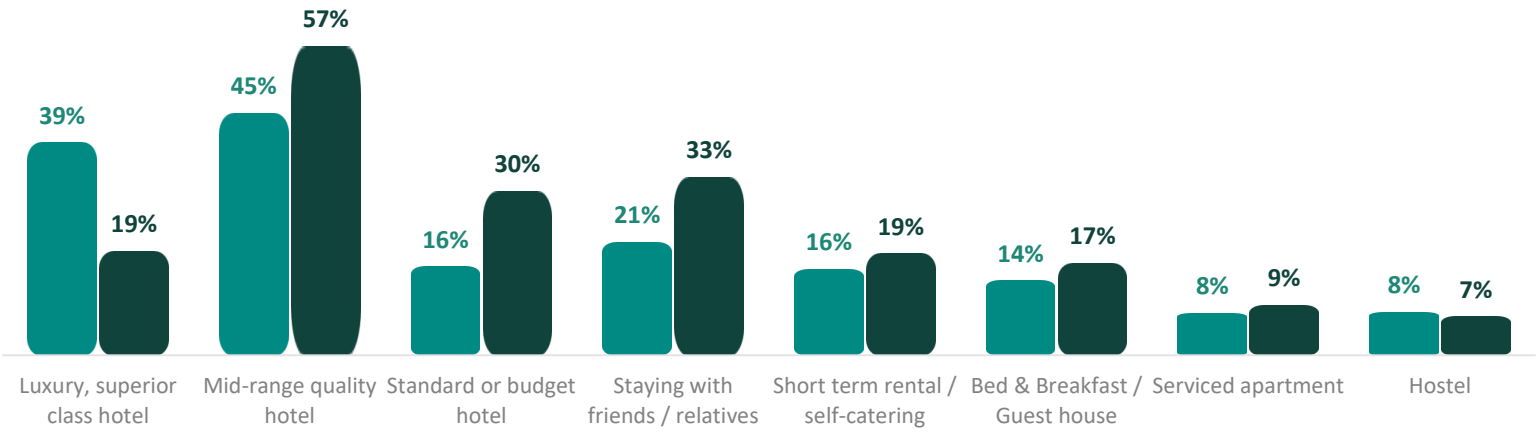


Accommodation Preferences



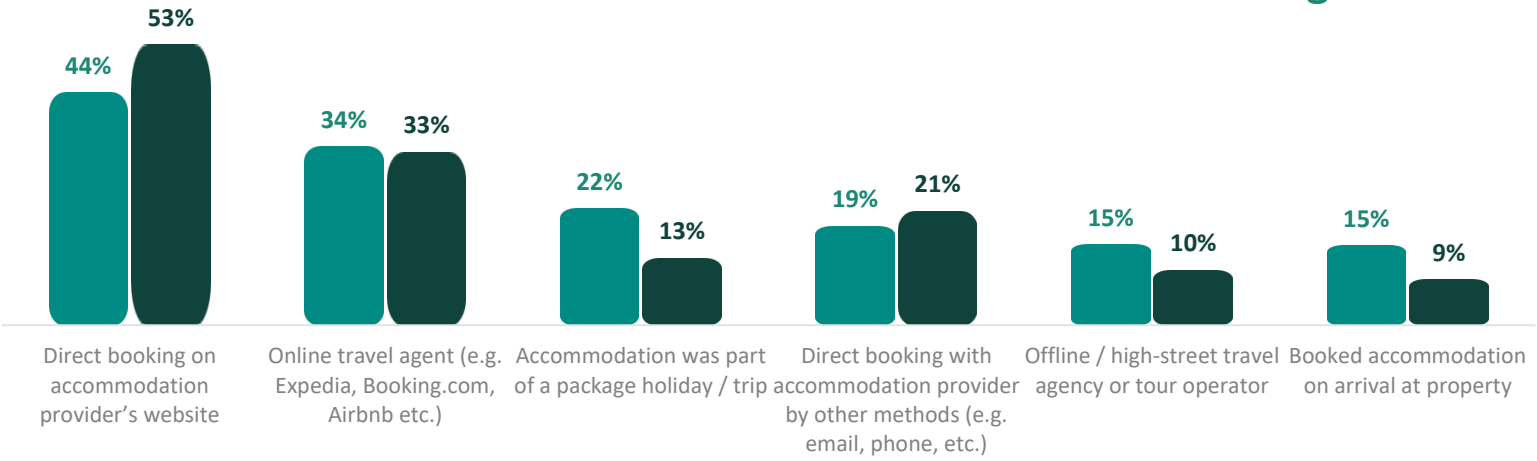
Domestic Travel

Accommodation Used



International Travel

Booking Method



Q. Thinking of all overnight leisure trips undertaken in the past 12 months, have you used any of the following types of accommodation?
Q. Still thinking of all overnight leisure trips undertaken in the past 12 months, what was the main method of booking your accommodation?

U.S. vs. Other Markets

▲ At least 5% above average

▼ At least 5% below average

Significant differences ordered by magnitude (highest to lowest)

str

Profile of Travelers



American travelers had similar characteristics compared to the other travel markets in terms of:

- Gender
- Social media influence
- Business travel

American travelers differed when it came to:

Age group 55+	48%	▲
Age group 16-34	17%	▼

Accommodation Preferences

Thinking of all overnight leisure trips undertaken in the past 12 months, have you used any of the following types of accommodation?	▼	45%	International: Mid-range quality hotel	Domestic: Mid-range quality hotel	57%	▲
	▼	21%	International: Staying with friends/relatives	Domestic: Staying with friends/relatives	33%	▲
	▼	16%	International: Standard or budget hotel	Domestic: Luxury, superior class hotel	19%	▲
Domestic: Direct on accommodation providers website		53%	▲	Still thinking of all overnight leisure trips undertaken in the past 12 months, what was the main method of booking your accommodation?		
International: Direct on accommodation providers website		44%	▲			
International: Online travel agent		34%	▼			



Travel Behaviors



Thinking of your international leisure trips in the past 12 months, which of the following were reasons for choosing to travel?

History and heritage	46%	▲
To visit friends and family	25%	▼
Climate/weather	21%	▼

Travel Habits & Plans

Central and South America	33%	▲	Where have you travelled internationally for leisure in the past 12 months?
North America	28%	▼	
Asia Pacific	24%	▼	





Would you like more information?

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- UK Office: Sean Morgan (smorgan@str.com)



HOTEL DATA
CONFERENCE
Hosted by STR and Hotel News Now

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Appendix: Survey questions



Profile of Respondents

- Where do you live?
 - *Australia, Canada, United Kingdom, United States*
- What is your gender?
 - *Male, Female, Other, Prefer not to say*
- Which age group do you belong to?
 - *16-24, 25-34, 35-44, 45-54, 55-64, 65-74, 75+*
- Did information on social media (e.g. Facebook, Instagram etc.) inspire you to travel to any the international destinations you visited on leisure trips in the last 12 months?
 - *Yes, No*
- In the past 12 months, have you stayed away from home overnight for business purposes?
 - *Yes, No*
- What is your gross annual household income range?
 - *Region specific income ranges and currencies*

Travel Habits & Plans

- Please tell us which country(ies) you have visited in the last 12 months?
 - *Argentina, Brazil, Canada, Chile, Cuba, Dominican Republic, Mexico, Peru, Puerto Rico, United States, Other American Country,*
 - *Austria, France, Germany, Greece, Italy, Netherlands, Poland, Portugal, Russia, Spain, Turkey, United Kingdom, Other European County*
 - *Bahrain, Egypt, Iran, Israel, Jordan, Morocco, Qatar, Saudi Arabia, South Africa, Tunisia, United Arab Emirates, Other Middle East and African Country*
 - *Australia, China, Hong Kong, India, Indonesia, Japan, Macao, Malaysia, New Zealand, Singapore, South Korea, Thailand, Vietnam, Other Asia and Pacific Country*
- How many international leisure trips have you been on in the past 12 months?
 - *Open ended numerical answer*
- Thinking of the next 12 months, are you likely to undertake fewer, the same or more international leisure trips compared to the previous 12 months?
 - *1 - Significantly fewer, 2 - Slightly fewer, 3 - The same, 4 - Slightly more, 5 - Significantly more*
- How many international leisure trips have you been on in the past 12 months?
 - *Open ended numerical answer*

Appendix: Survey questions



Travel Behaviors

- Thinking of your international leisure trips in the past 12 months, which, if any, of the following were reasons for choosing to visit a destination? (pick up to 3):
 - *Value for money, Influenced to visit by media / personal recommendation / review, Health / wellness (e.g. spa, yoga retreat), Access to nature / picturesque landscapes, Climate / weather, Special events (e.g. concert, sporting event), To visit friends / family, History, heritage and culture of destination, Sporting / physical activity (e.g. golf, hiking, cycling), Food and drink of destination, Convenience / accessibility of destination, Friends / family / partner wanted to visit destination, Other*
- Still thinking of your international leisure trips in the past 12 months, who did you travel with most regularly?
 - *On your own {exclusive}, With partner / spouse, With your children (under 16 years old), With your children (over 16 years old), With other adult family members, With other adults, With other children (under 16 years of age), Other*

Accommodation Preferences

- Thinking of all overnight leisure trips undertaken in the past 12 months, have you used any of the following types of accommodation for international trips?
 - *Luxury, superior class hotel, Mid-range quality hotel, Standard or budget hotel, Bed & Breakfast / Guest house, Short term rental / vacation rental / self-catering accommodation, Serviced apartment, Hostel, Staying with friends / relatives, Other*
- Thinking of all overnight leisure trips undertaken in the past 12 months, have you used any of the following types of accommodation for domestic trips?
 - *Luxury, superior class hotel, Mid-range quality hotel, Standard or budget hotel, Bed & Breakfast / Guest house, Short term rental / vacation rental / self-catering accommodation, Serviced apartment, Hostel, Staying with friends / relatives, Other*
- Still thinking of all overnight leisure trips undertaken in the past 12 months, how did you book your accommodation for international trips?
 - *Booked accommodation on arrival at property, Direct booking on accommodation provider's website, Other direct booking methods (e.g. email, phone, etc.), Online travel agent (e.g. Expedia, Booking.com, Airbnb etc.), Offline / high-street travel agency or tour operator, Accommodation was part of a package holiday / trip, Other*
- Still thinking of all overnight leisure trips undertaken in the past 12 months, how did you book your accommodation for domestic trips?
 - *Booked accommodation on arrival at property, Direct booking on accommodation provider's website, Other direct booking methods (e.g. email, phone, etc.), Online travel agent (e.g. Expedia, Booking.com, Airbnb etc.), Offline / high-street travel agency or tour operator, Accommodation was part of a package holiday / trip, Other*