



ISSUE 3, 2017

Global Travel Insights



Table of Contents

04. Looking Back

06. Outbound Quarterly Search Trends

- Global Travel Trends
- North America
- Latin America
- Europe
- Middle East & Africa
- Asia-Pacific

12. Looking Forward

14. North America

- Fall Search Trends
- September Travel Trends

17. Latin America

- Fall Search Trends
- September Travel Trends

20. Europe

- Fall Search Trends
- September Travel Trends

24. Middle East & Africa

- Fall Search Trends
- September Travel Trends

27. Asia-Pacific

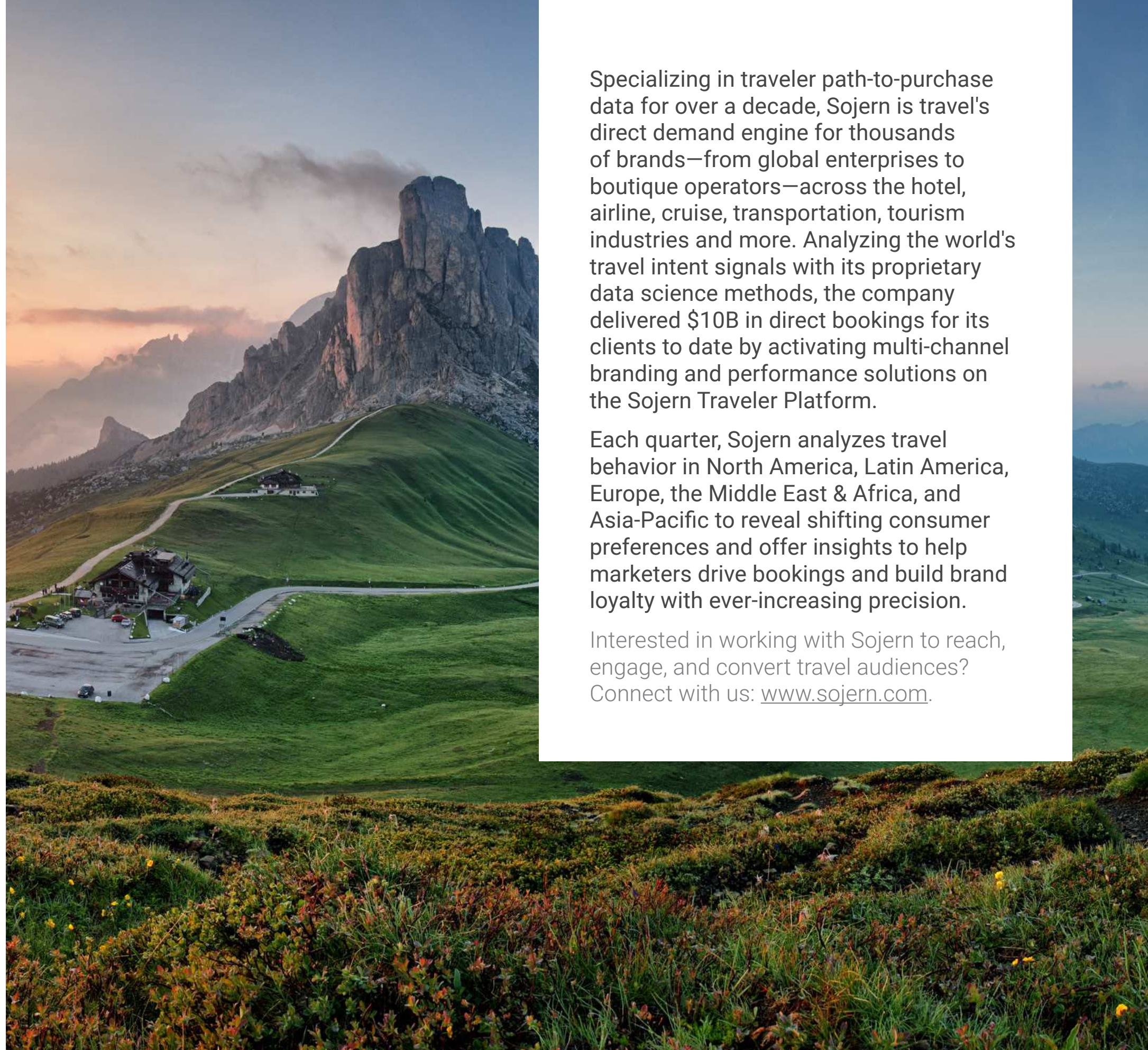
- Fall Search Trends
- September Travel Trends

Glossary & Methodology

Specializing in traveler path-to-purchase data for over a decade, Sojern is travel's direct demand engine for thousands of brands—from global enterprises to boutique operators—across the hotel, airline, cruise, transportation, tourism industries and more. Analyzing the world's travel intent signals with its proprietary data science methods, the company delivered \$10B in direct bookings for its clients to date by activating multi-channel branding and performance solutions on the Sojern Traveler Platform.

Each quarter, Sojern analyzes travel behavior in North America, Latin America, Europe, the Middle East & Africa, and Asia-Pacific to reveal shifting consumer preferences and offer insights to help marketers drive bookings and build brand loyalty with ever-increasing precision.

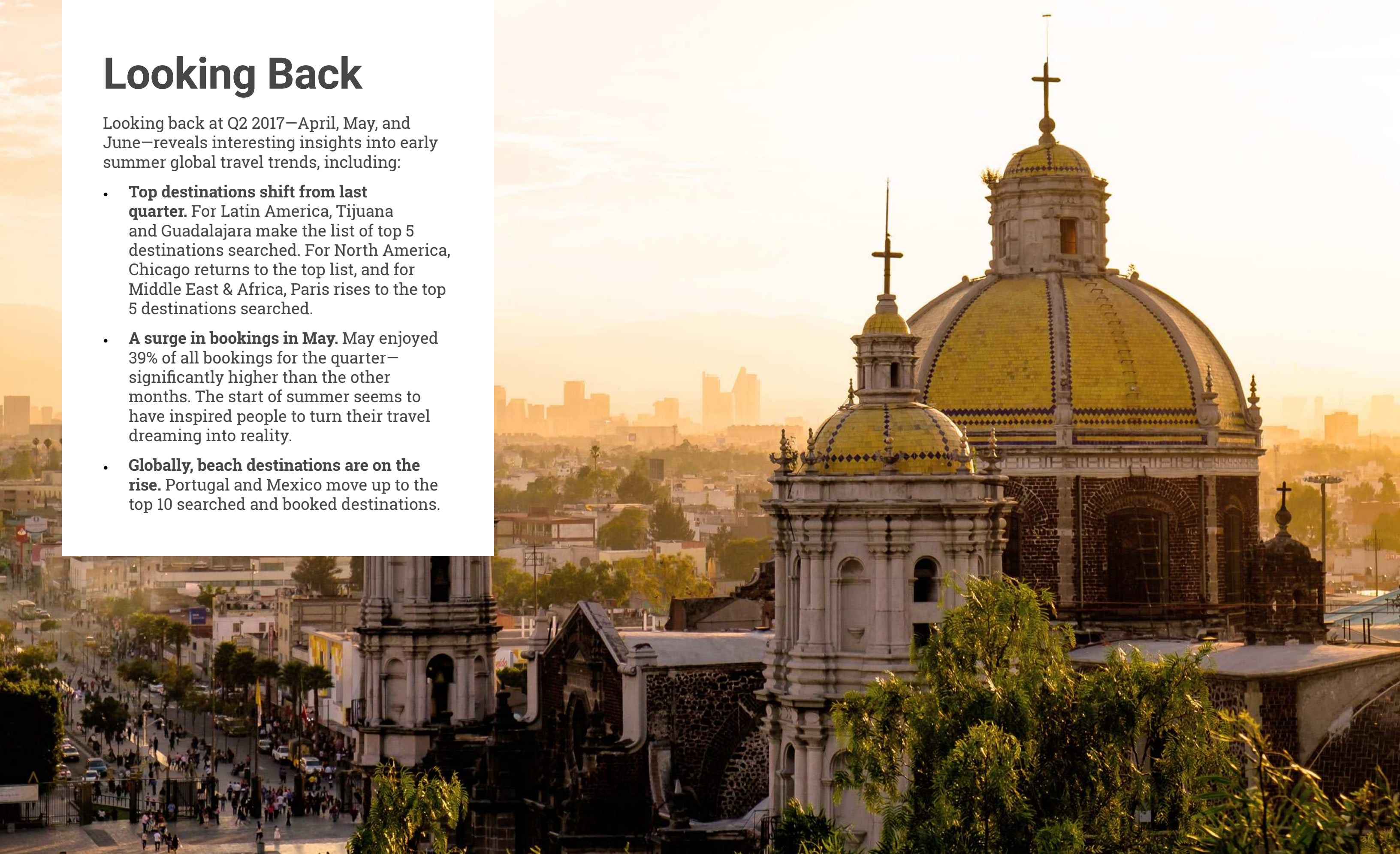
Interested in working with Sojern to reach, engage, and convert travel audiences? Connect with us: www.sojern.com.



Looking Back

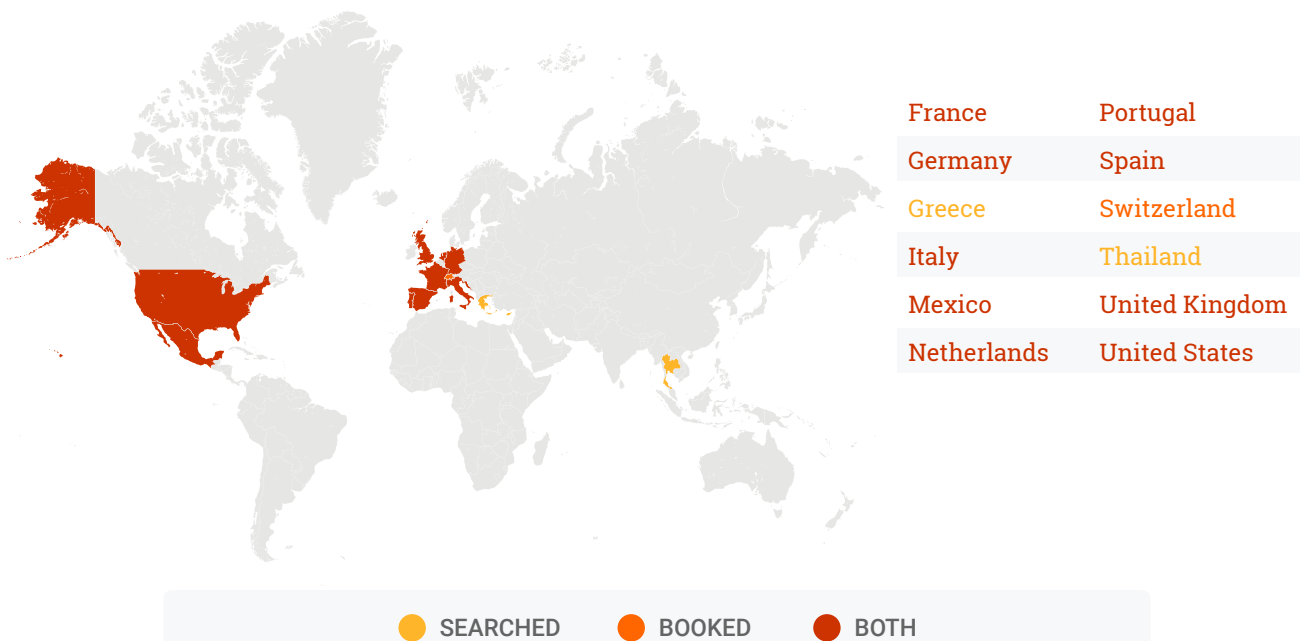
Looking back at Q2 2017—April, May, and June—reveals interesting insights into early summer global travel trends, including:

- **Top destinations shift from last quarter.** For Latin America, Tijuana and Guadalajara make the list of top 5 destinations searched. For North America, Chicago returns to the top list, and for Middle East & Africa, Paris rises to the top 5 destinations searched.
- **A surge in bookings in May.** May enjoyed 39% of all bookings for the quarter—significantly higher than the other months. The start of summer seems to have inspired people to turn their travel dreaming into reality.
- **Globally, beach destinations are on the rise.** Portugal and Mexico move up to the top 10 searched and booked destinations.

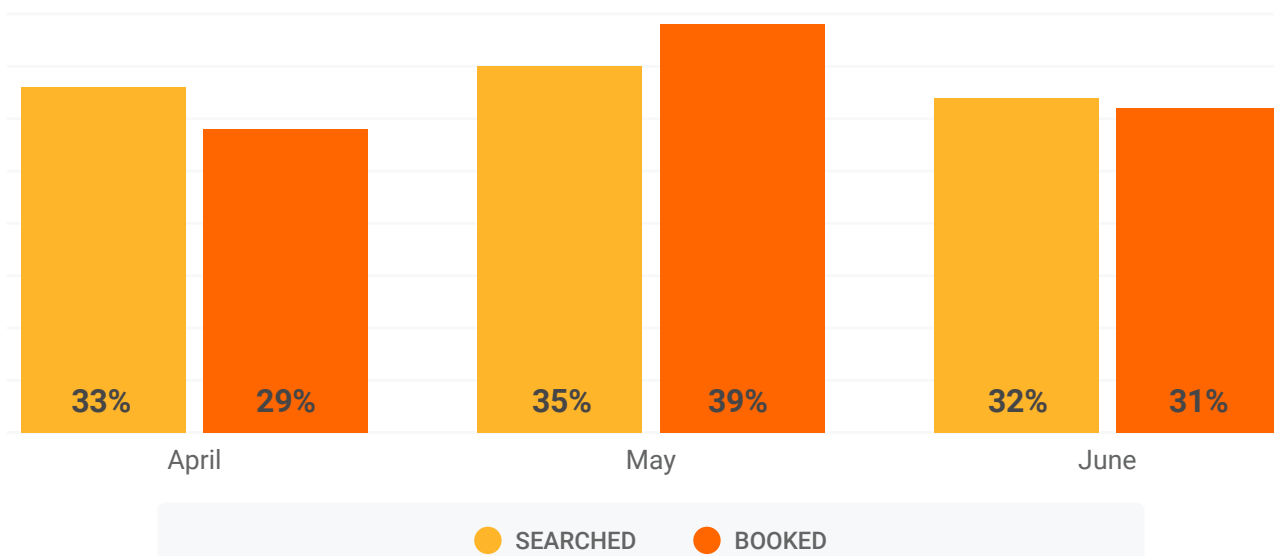


What were the global travel trends for the quarter?

Top 10 Countries Searched and Booked



Share of Q2 2017 Search and Booking Volumes by Month

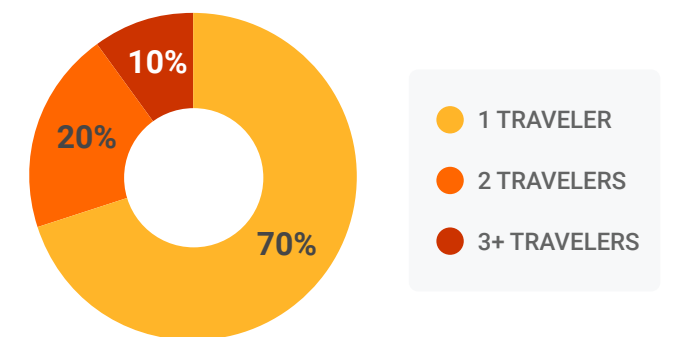


What were the quarterly outbound search trends for North America?

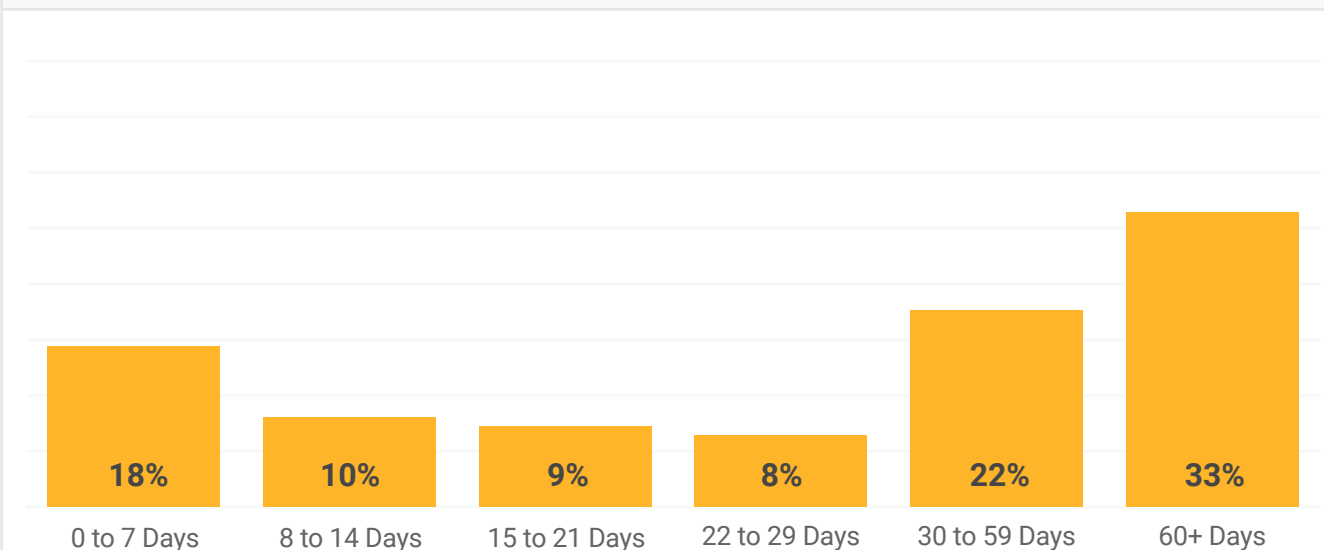
Top 5 Destinations



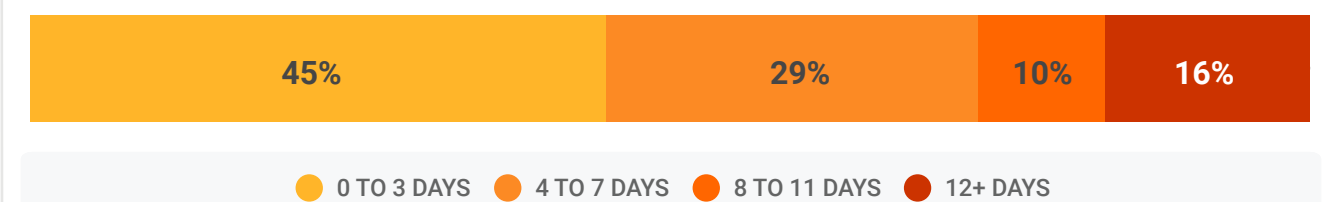
Party Size



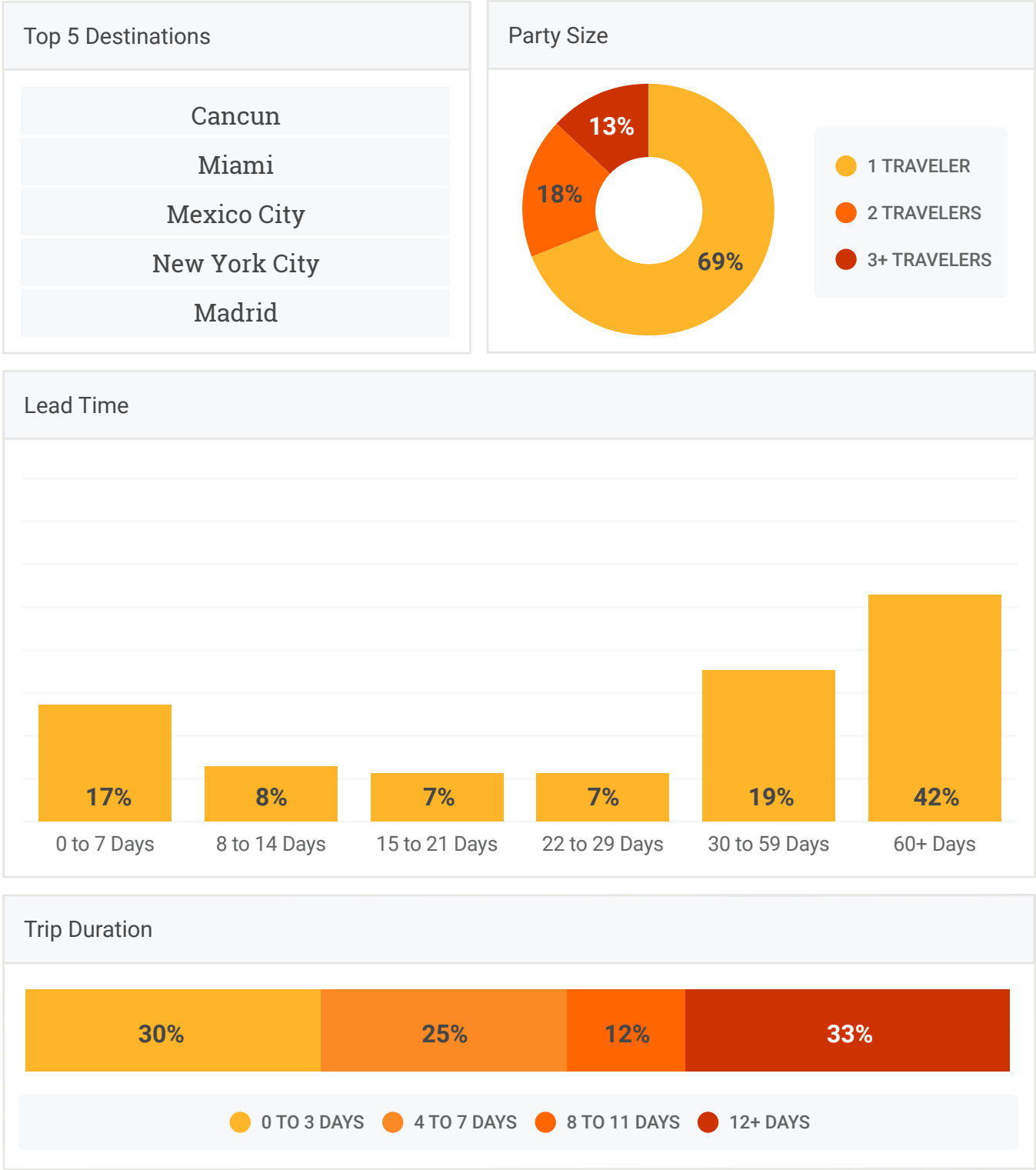
Lead Time



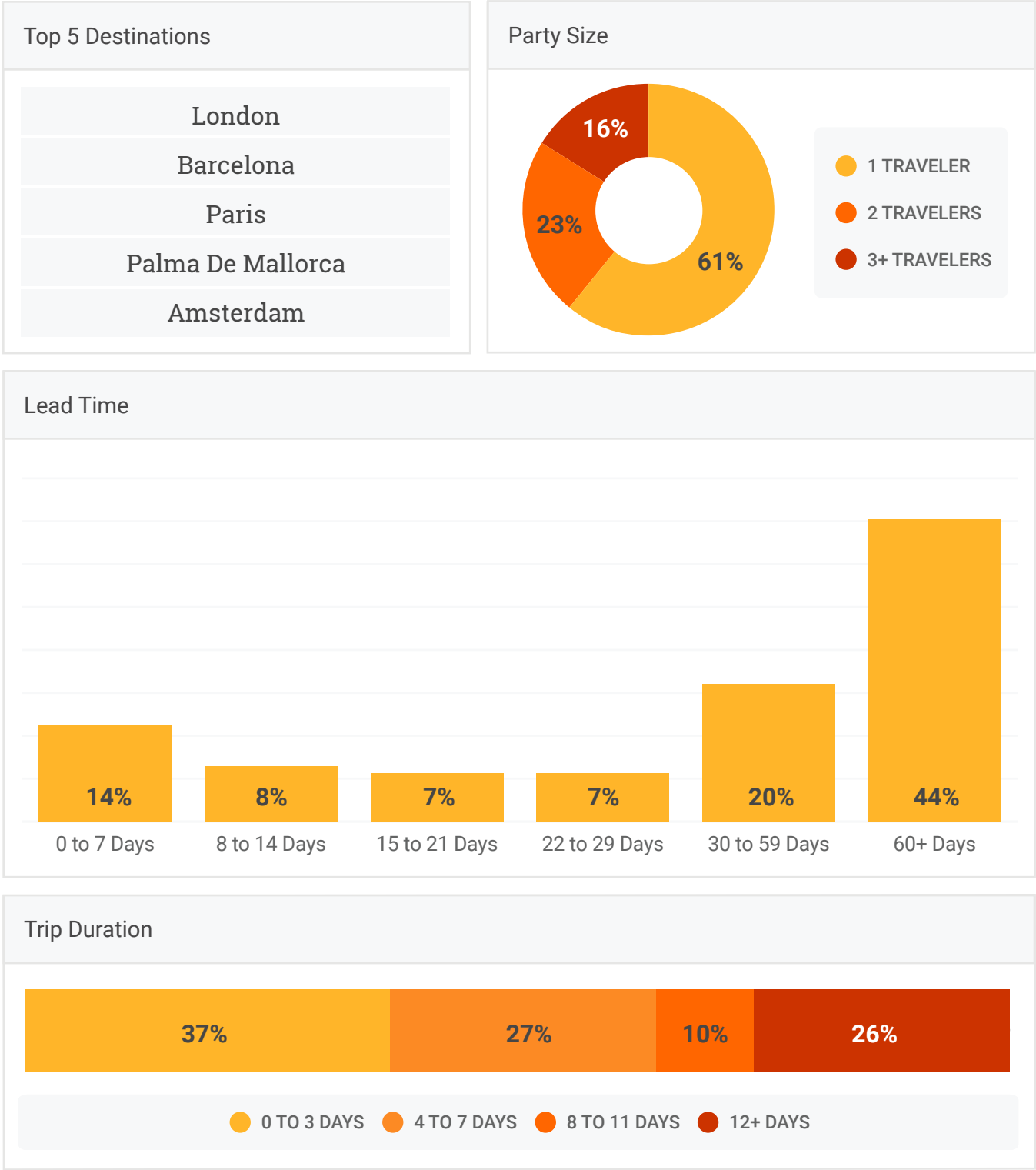
Trip Duration



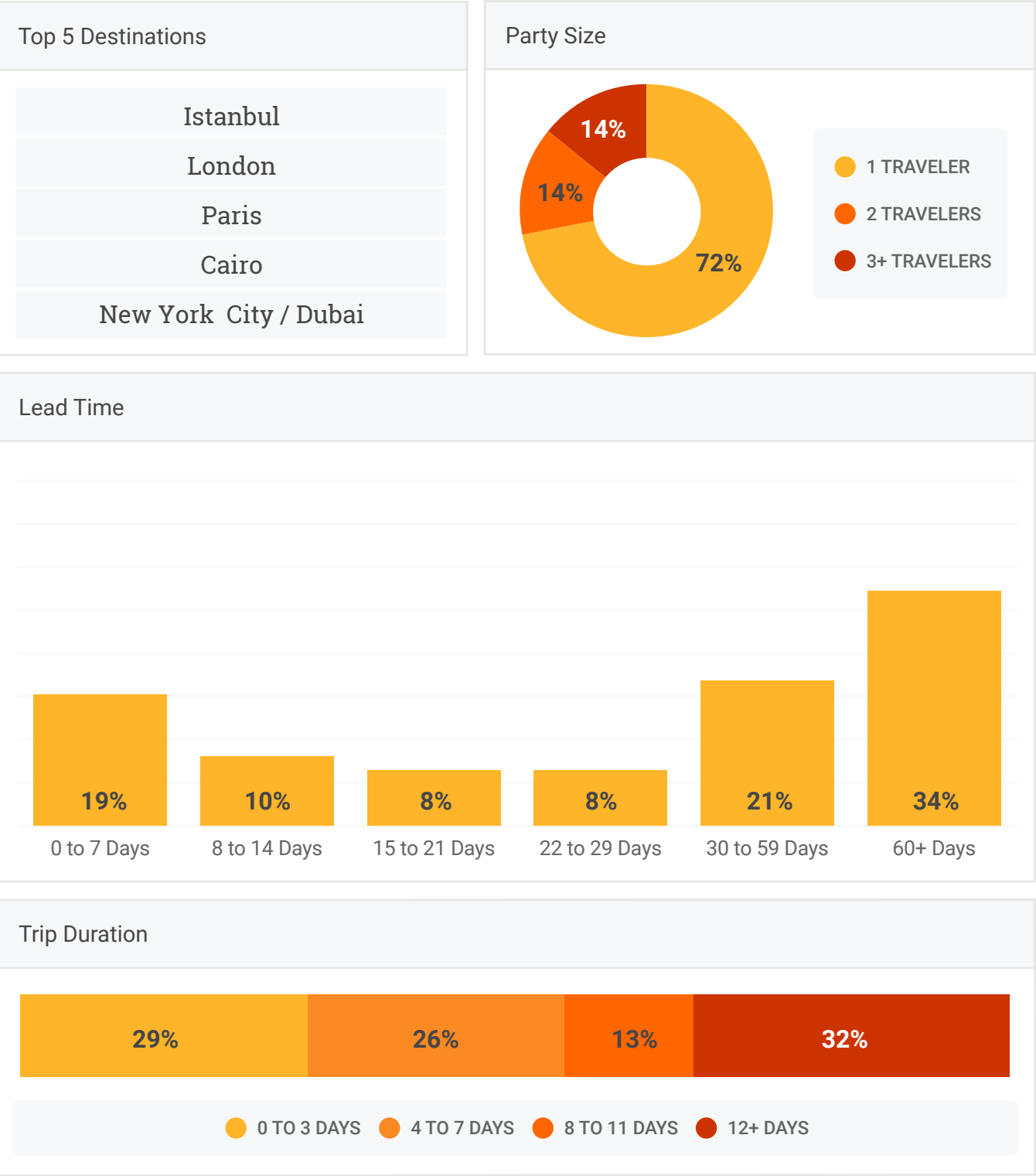
What were the quarterly outbound search trends for Latin America?



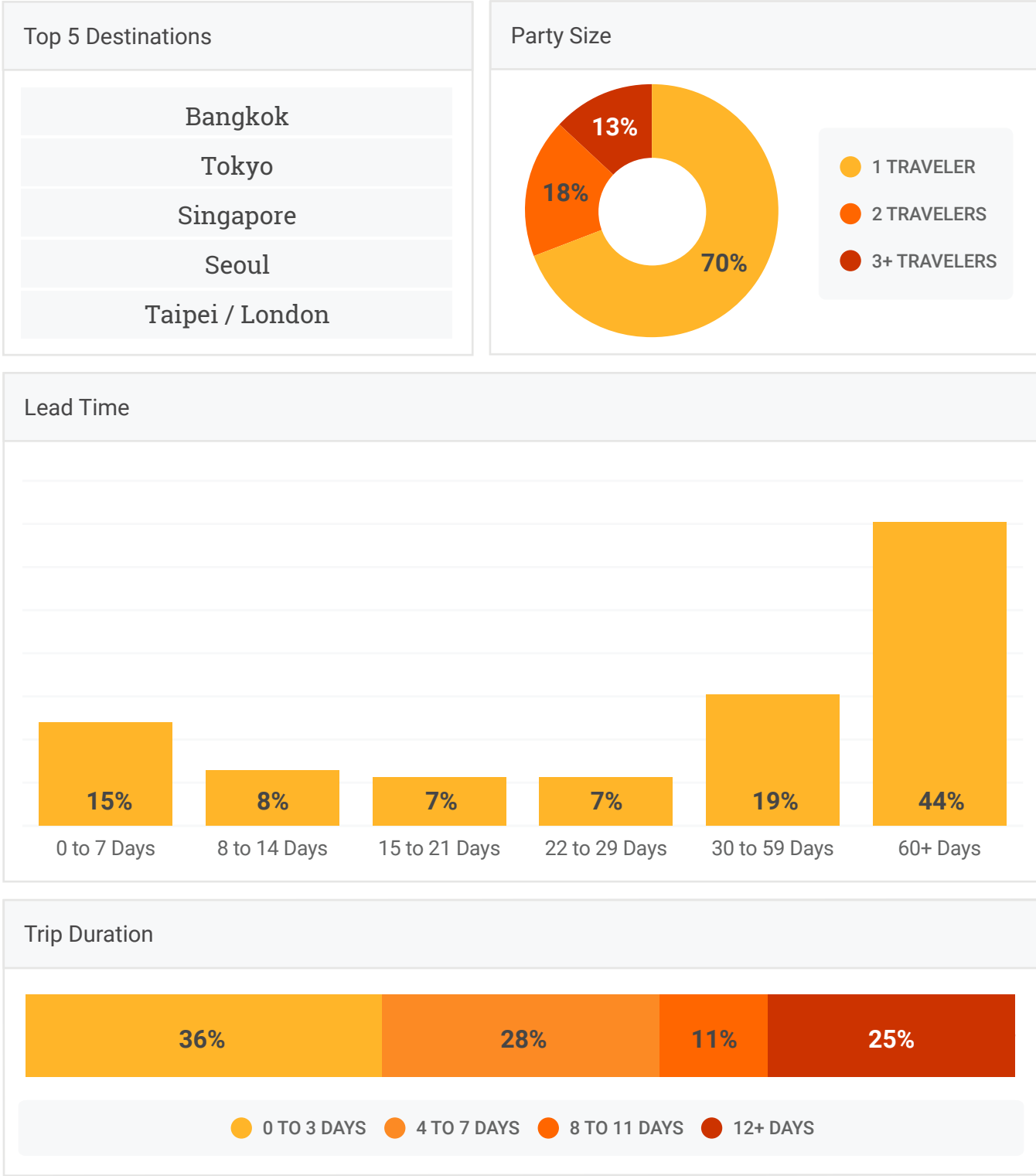
What were the quarterly outbound search trends for Europe?



What were the quarterly outbound search trends for the Middle East & Africa?



What were the quarterly outbound search trends for Asia-Pacific?





Looking Forward

July, August, and September mark the end of summer and the beginning of fall for several around the globe. Many travelers are squeezing in that last getaway before school starts and winter comes. In the Looking Forward section, we analyze searches made during the summer to understand:

- How early planning for holidays like US Labor Day, Chinese Golden Week, and Latin American independence days is shaping up
- Where people are looking to spend their last days of summer and early fall
- What travel marketers can do now to influence these early planners

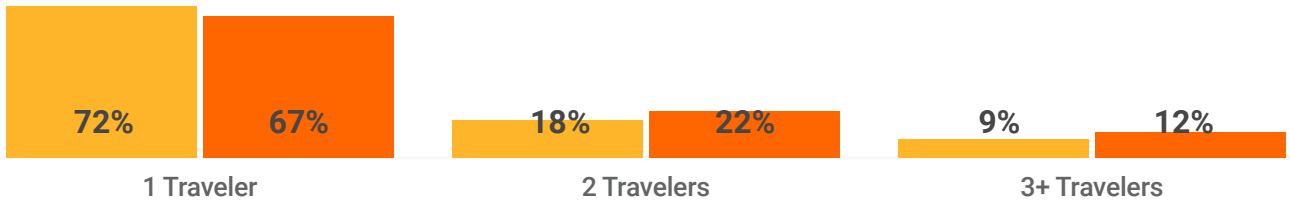
What are the fall search trends for North America?¹

● SHORT-HAUL ● LONG-HAUL

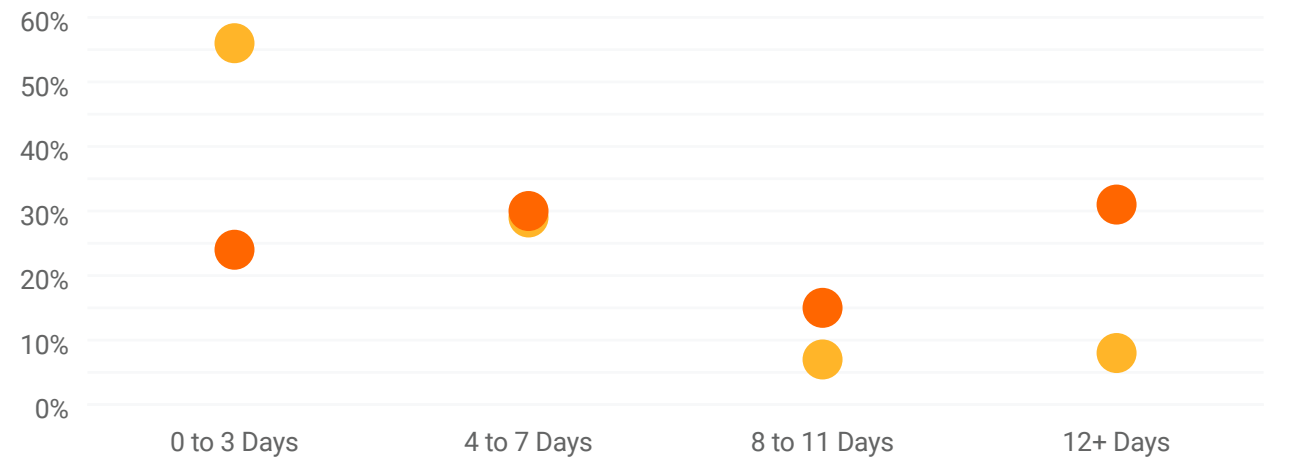
Top 5 Destinations

Miami	Cancun
New York City	London
Las Vegas	Guadalajara
Los Angeles	San Juan
Chicago	Paris

Party Size



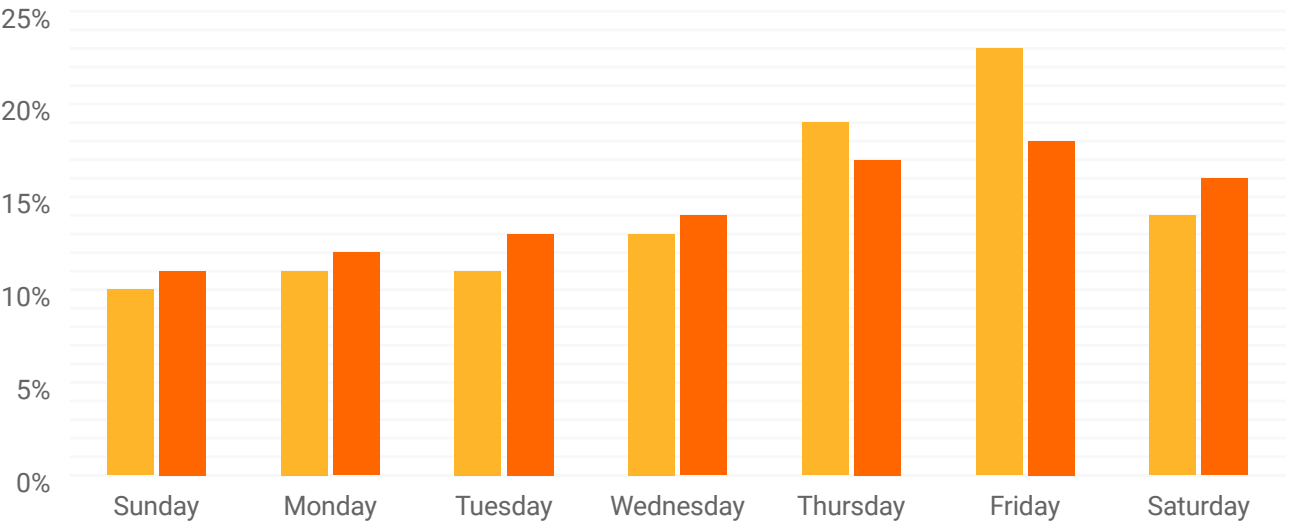
Trip Duration



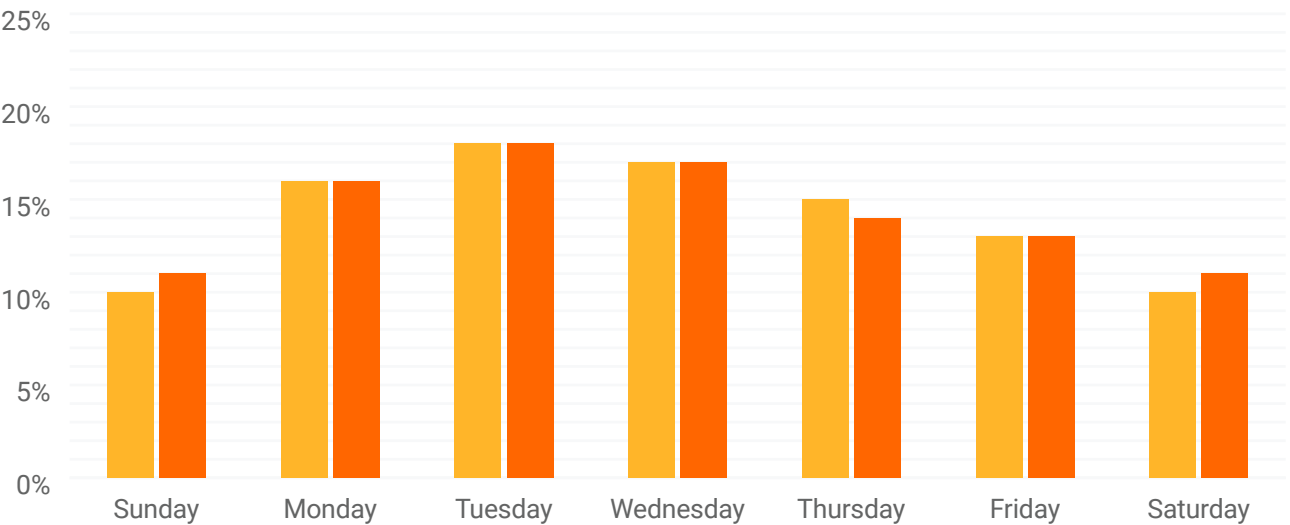
What are the fall search trends for North America?

● SHORT-HAUL ● LONG-HAUL

Share of Weekday Travel Departures



Share of Weekday Searches



North America Spotlight: September Travel Trends

For many Americans, Labor Day is the last hoorah of summer, which they celebrate with a long weekend of travel. We're already seeing travel planning underway for this holiday: September 1 and 2 are, so far, two of the top departure dates searched for the month.



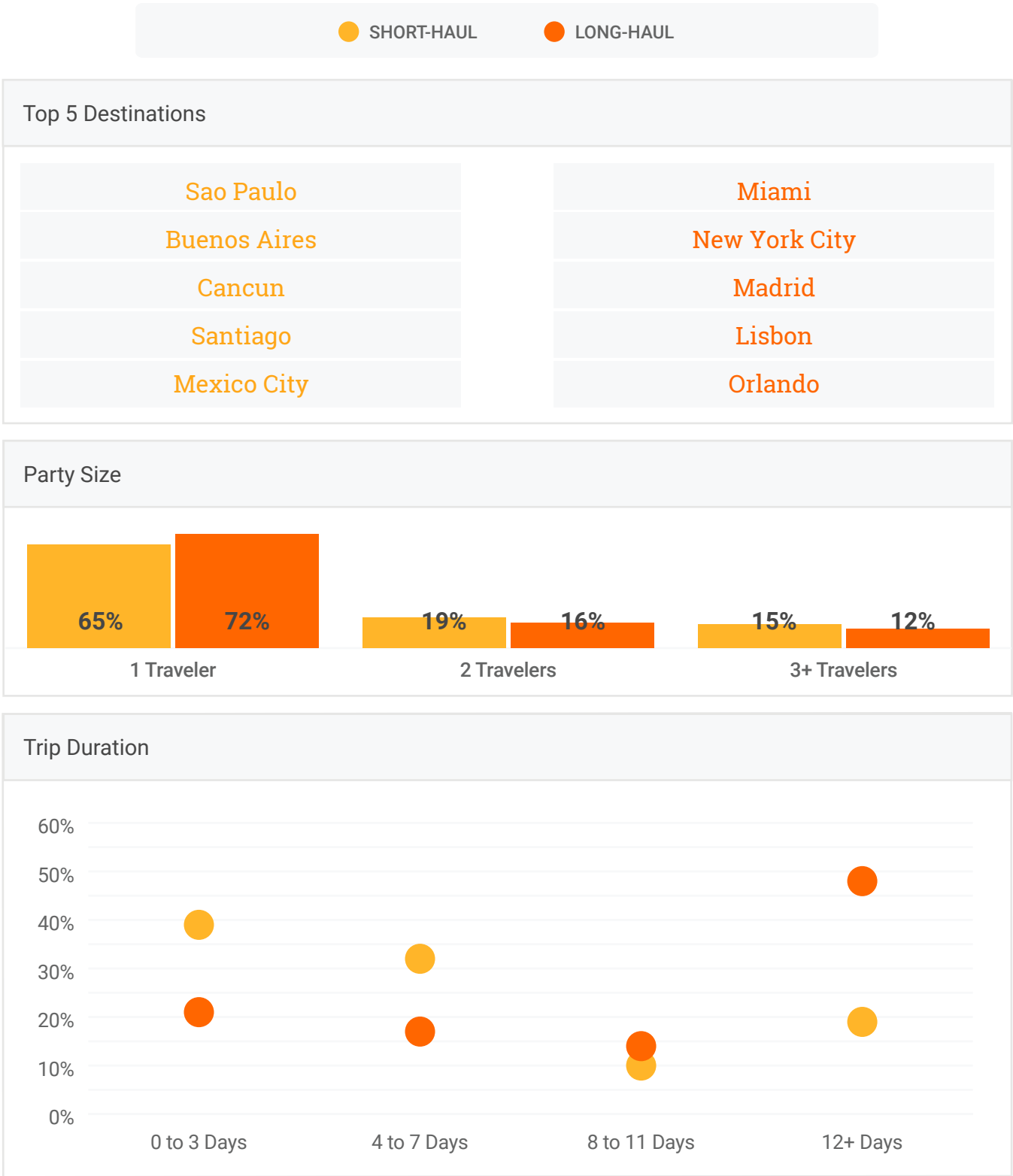
Top Destinations Searched			
Rank	Beach	Metropolitan	Sightseeing/Recreational
1	Miami	Las Vegas	Orlando
2	Cancun	New York City	London
3	Myrtle Beach	London	Chicago
4	San Juan	Chicago	Paris
5	Honolulu	Los Angeles	Rome

Knowing American travelers are looking to get away for Labor Day weekend, but are unsure as to their exact departure date or destination, it's important to engage with them while they are in the decision-making process.

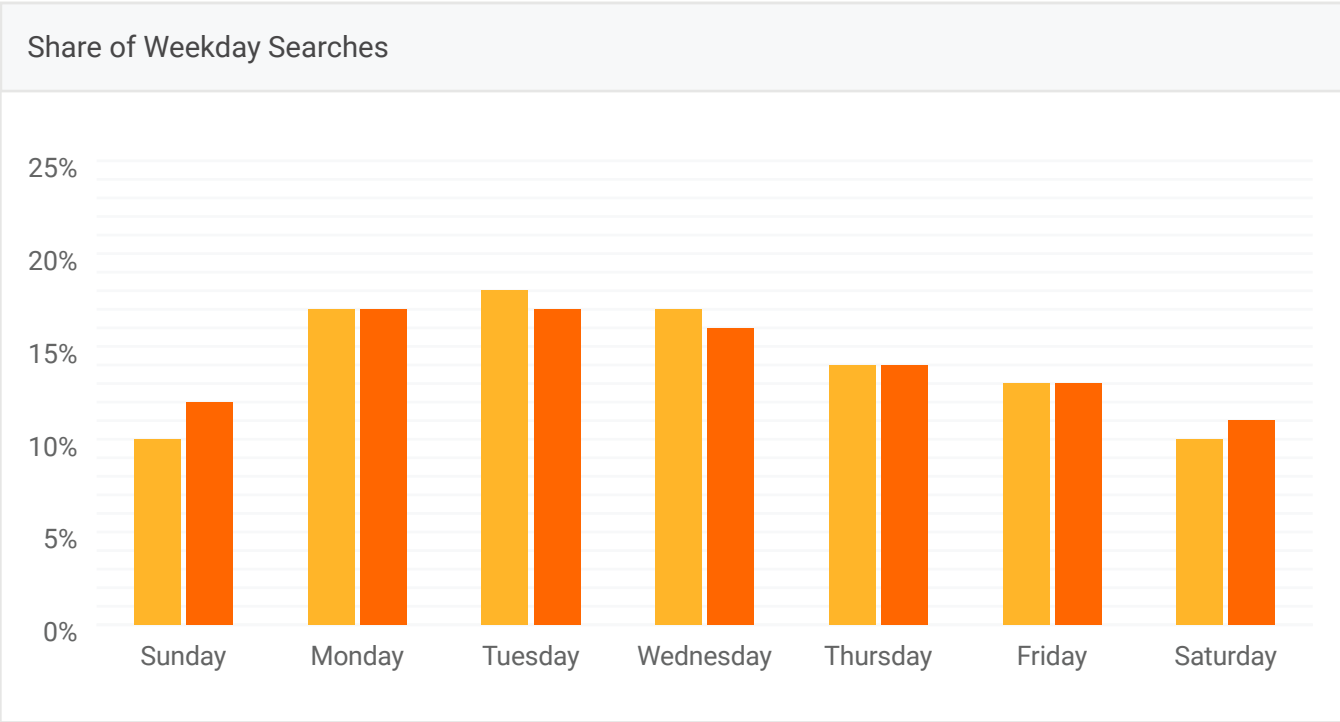
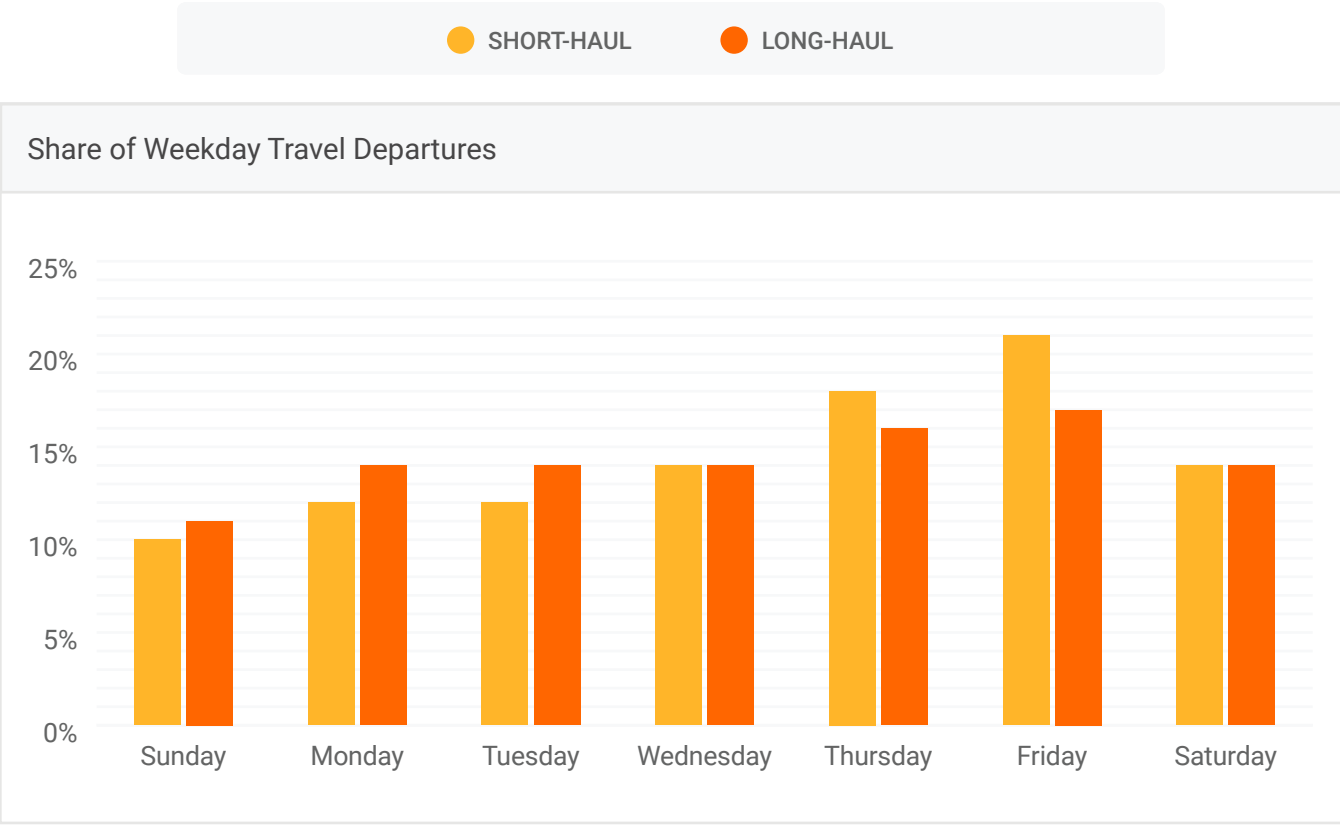
First, you need real-time data to know when travelers are in the decision-making process. Second, you need to reach them on the right channel with the right message. [Facebook's Dynamic Ads for Travel](#) is perfect for engaging indecisive travelers—you can show them real-time pricing for flights and hotel rooms for the dates they searched, keeping your brand and offering top of mind while they plan.



What are the fall search trends for Latin America?



What are the fall search trends for Latin America?



Latin America Spotlight: September Travel Trends

Costa Rica, El Salvador, Guatemala, Honduras, and Nicaragua celebrate their independence days on September 15, while Mexico’s is observed on the 16th. With so many public holidays taking place at the same time, it’s no surprise to see the top departure dates searched falling on the Thursday and Friday before festivities begin.

Top Three Departure Dates Searched

1	15	14
---	----	----

Top Destinations Searched

Rank	Beach	Metropolitan	Sightseeing/Recreational
1	Cancun	Madrid	Cancun
2	Miami	Lisbon	Madrid
3	Barcelona	New York City	Lisbon
4	Rio de Janeiro	Mexico City	Paris
5	San Jose del Cabo	Guadalajara	Barcelona

For early Latin American travel planners, Cancun tops the list for both beach and sightseeing/recreational destinations. Cancun travel marketers need to effectively speak to two audiences—beach goers and sightseers—and turn these searches into bookings. Consider using video to do just that.

Create one captivating video to showcase your beautiful beaches as well as your lively attractions—and inspire many kinds of travelers with only one creative. Then, use Sojern's expertise in travel and video campaign management across all device types, channels, mobile in-app and web, 43 exchanges, Facebook, Instagram, and YouTube—to find and engage these travelers throughout their path to purchase.

Try Google's Adapted Audiences which allows only a few advertisers, like Sojern, to import custom, anonymous cookie-based lists to run on YouTube. This provides deeper granularity and segmentation for targeting in YouTube campaigns, and ensures you reach your preferred audiences with the right message regardless of whether they're beach goers, sightseers, or both.

Trip Duration

52% of long-haul travel is for 12+ days	37% of short-haul travel is for 4 to 7 days	33% of short-haul travel is for 0 to 3 days
---	---	---

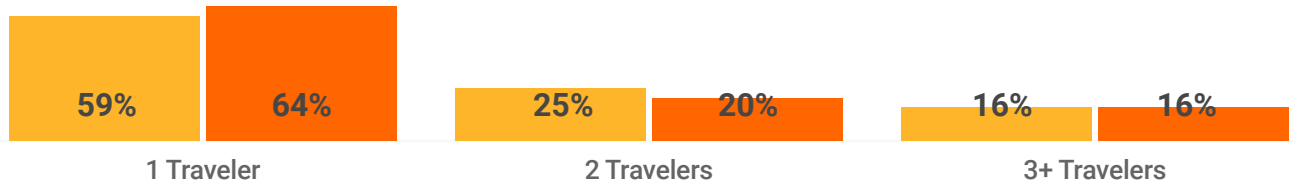
What are the fall search trends for Europe?

● SHORT-HAUL ● LONG-HAUL

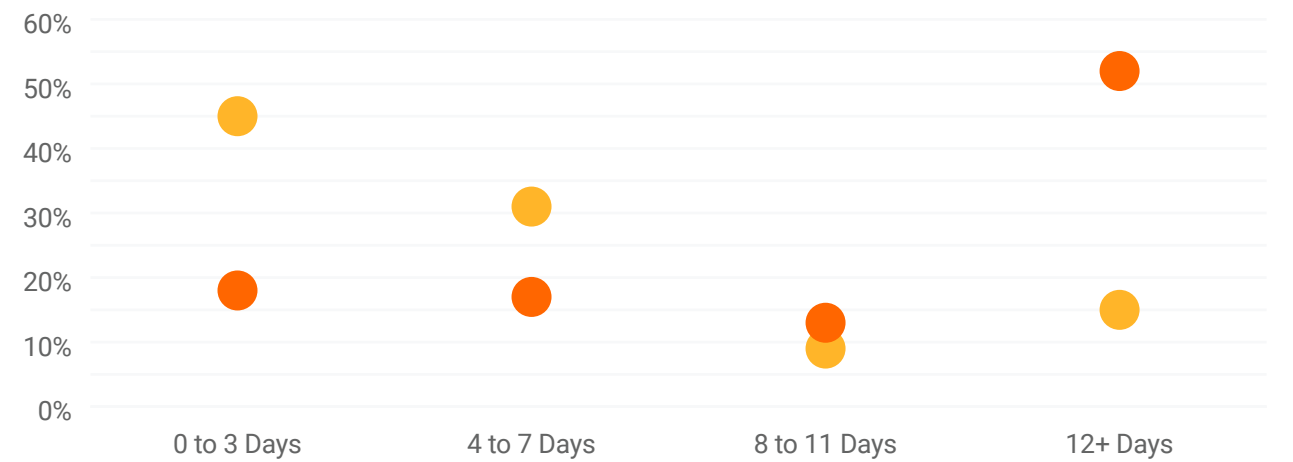
Top 5 Destinations

London	New York City
Barcelona	Bangkok
Paris	Istanbul
Palma De Mallorca	Dubai
Amsterdam	Denpasar

Party Size



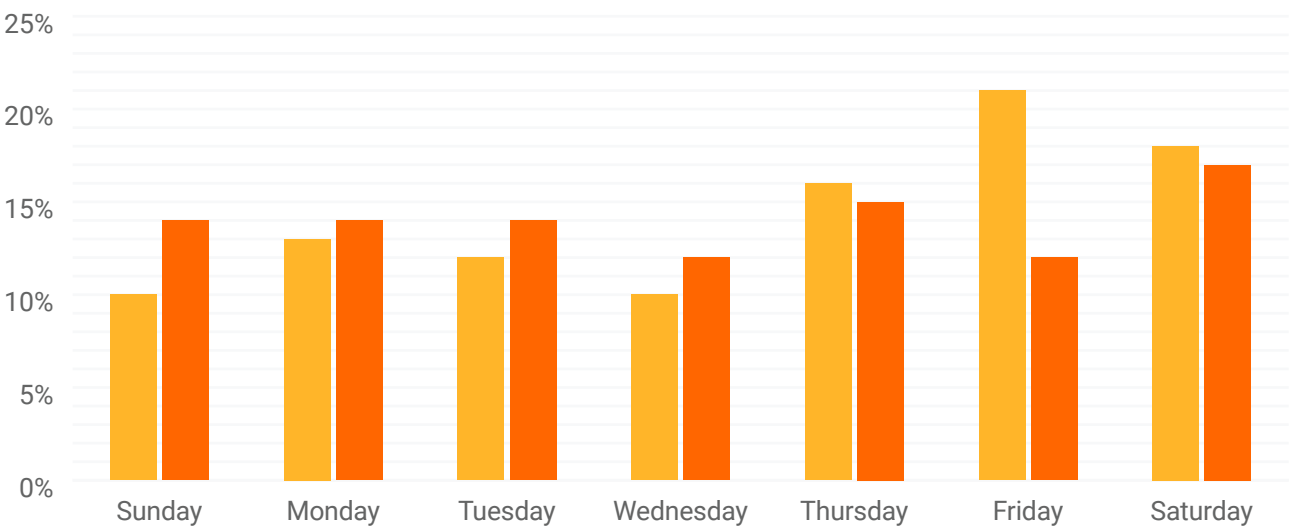
Trip Duration



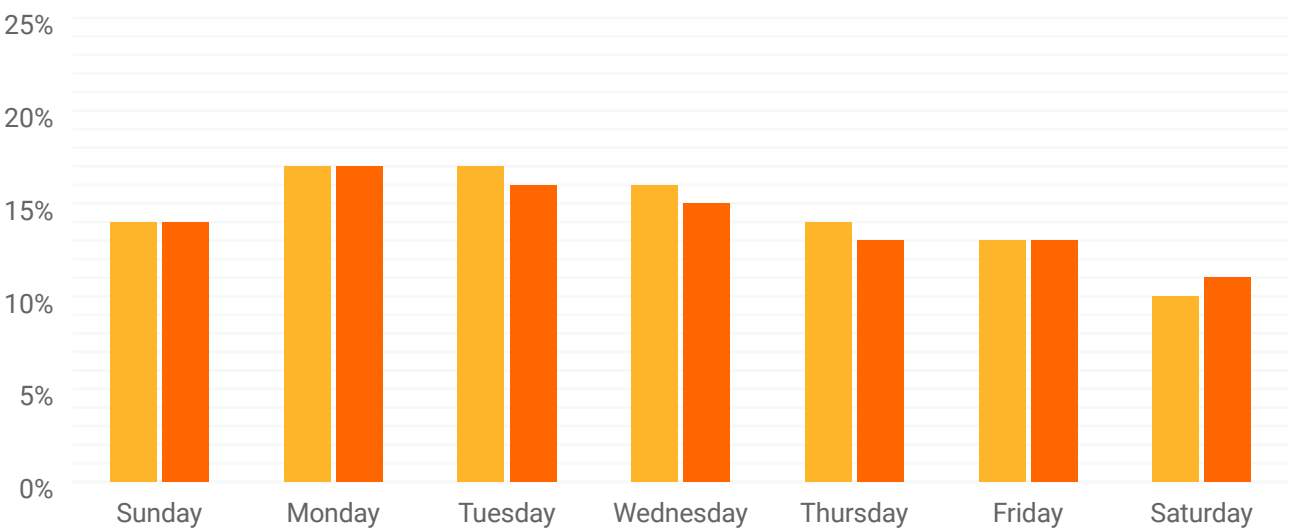
What are the fall search trends for Europe?

● SHORT-HAUL ● LONG-HAUL

Share of Weekday Travel Departures



Share of Weekday Searches



Europe Spotlight: September Travel Trends

When it comes to beach destinations for September, early planners are primarily considering Spain. The only exception in the top 5 list is Faro, Portugal. **Portugal's popularity with travelers is a growing trend—it's both a top 10 searched and booked destination globally for Q2 2017, and is one of the top rising destinations for hotels.** ²

Top Three Departure Dates Searched		
1	2	8

Top Destinations Searched			
Rank	Beach	Metropolitan	Sightseeing/Recreational
1	Barcelona	New York City	Barcelona
2	Palma de Mallorca	London	London
3	Malaga	Paris	Paris
4	Ibiza	Amsterdam	Rome
5	Faro	Bangkok	Amsterdam

✓

The top three metropolitan September getaway searches are familiar names in travel. But, we also see Amsterdam and Bangkok on the list. With so many amazing cities to explore, travel marketers might need to work a little harder to ensure travelers keep them top of mind as they plan their metropolitan getaways.

Facebook's Carousel ad offering is great for telling your destination's story. You can feature a number of different images in one ad, efficiently building awareness and ensuring travelers get a taste of all your diverse offerings. Bonus: it has a lower CPC than single image ads.

Trip Duration		
48% of long-haul travel is for 12+ days	35% of short-haul travel is for 4 to 7 days	39% of short-haul travel is for 0 to 3 days



What are the fall search trends for Middle East & Africa?

What are the fall search trends for Middle East & Africa?

● SHORT-HAUL
 ● LONG-HAUL

Top 5 Destinations

Istanbul

Cairo

Dubai

Antalya

Izmir

London

Paris

New York City

Amsterdam

Bangkok

Party Size

75%

71%

12%

15%

13%

14%

1 Traveler

2 Travelers

3+ Travelers

Trip Duration

60%
50%
40%
30%
20%
10%
0%

0 to 3 Days

4 to 7 Days

8 to 11 Days

12+ Days

● SHORT-HAUL
 ● LONG-HAUL

Share of Weekday Travel Departures

25%
20%
15%
10%
5%
0%

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Share of Weekday Searches

25%
20%
15%
10%
5%
0%

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Middle East & Africa Spotlight: September Travel Trends

Throughout United Arab Emirates and much of the Muslim world, September 1-3 marks Eid al-Adha. Based on top departure dates searched so far, we see early planners looking to take advantage of the long weekend or waiting until after the festival to depart.



Top Destinations Searched	
New York City	Amsterdam
London	Barcelona
Bangkok	Rome
Istanbul	Athens
Paris	Lisbon

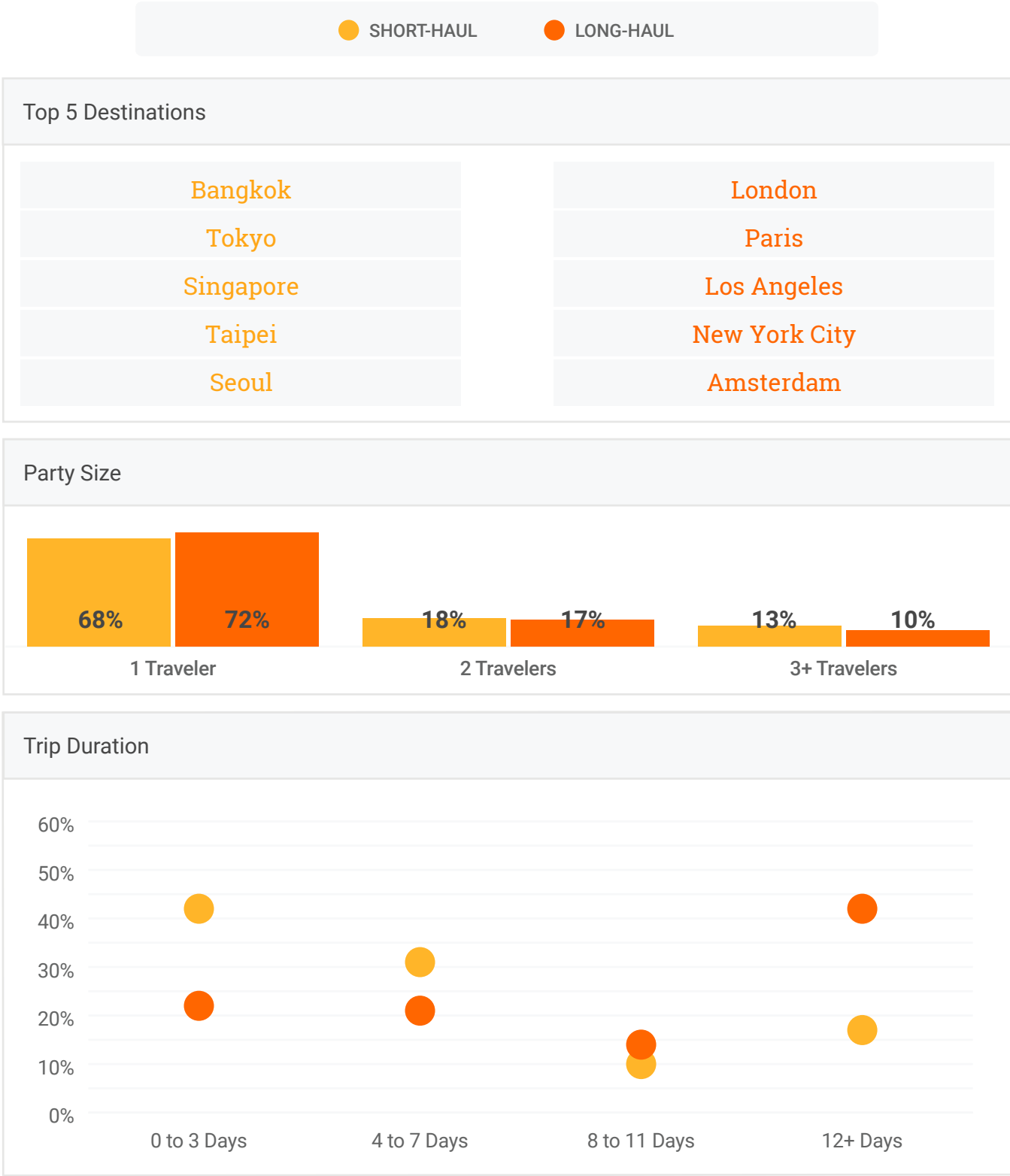
✓

So far, 7 out of 10 destinations searched for September travel are in Europe. For those not in the top list but wanting to grow their brand awareness with Middle East & African travelers, consider native ads.

Native ads blend into the content of a page a traveler is viewing, regardless of device, creating a more seamless and relevant experience for travelers as they begin their search. Native ads also boast higher interaction rates, compared to standard display—making them the perfect way to effectively raise awareness of your destination with Middle East & African travelers, across all devices and channels.³



What are the fall search trends for Asia-Pacific?



What are the fall search trends for Asia-Pacific?



Asia-Pacific: September Travel Trends

This year’s Chinese Golden Week kicks off on October 1 and runs through the 7th. We see September 30 as one of the most popular departure dates searched so far, indicating early APAC travel planners are already looking to get away for the holiday.

Top Three Departure Dates Searched

1

15

30

Top Destinations Searched

Rank	Beach	Metropolitan	Sightseeing/Recreational
1	Denpasar	Tokyo	Osaka
2	Melbourne	London	Okinawa
3	Phuket	Bangkok	Los Angeles
4	Honolulu	Singapore	Sydney
5	Barcelona	Taipei	Melbourne

✓

Given the rising smartphone penetration in the region, travel marketers looking to engage APAC travelers need to have a full-funnel mobile strategy.⁴ This starts with finding and engaging your audience when they’re on their mobile devices. You’ll also want to develop mobile-optimized ads. Consider less text, captivating imagery, video footage, large CTAs with easy to click exit buttons, and contextual placements that are social in nature.

Don’t stop there: your website needs to be mobile friendly too. Ensuring your website loads fast, content and design are optimized for mobile, and a visitor can complete their transaction in as few steps as possible is key to turning a mobile looker into a booker.

Be sure to track how your mobile visitors convert versus your desktop visitors. It’s highly likely your mobile and desktop users’ needs will be vastly different—as will their behavior and conversion metrics.

Trip Duration

43%

of long-haul travel is for 12+ days

33%

of short-haul travel is for 4 to 7 days

35%

of short-haul travel is for 0 to 3 days

Glossary

Lead Time (Search of Booking)
The length of time between a search or booking and departure date.

Last-Minute Booker
A traveler that books a trip with seven days or less to travel.

Short-Haul & Long-Haul Trip
Short-haul is usually regional, while long-haul is usually inter-regional.

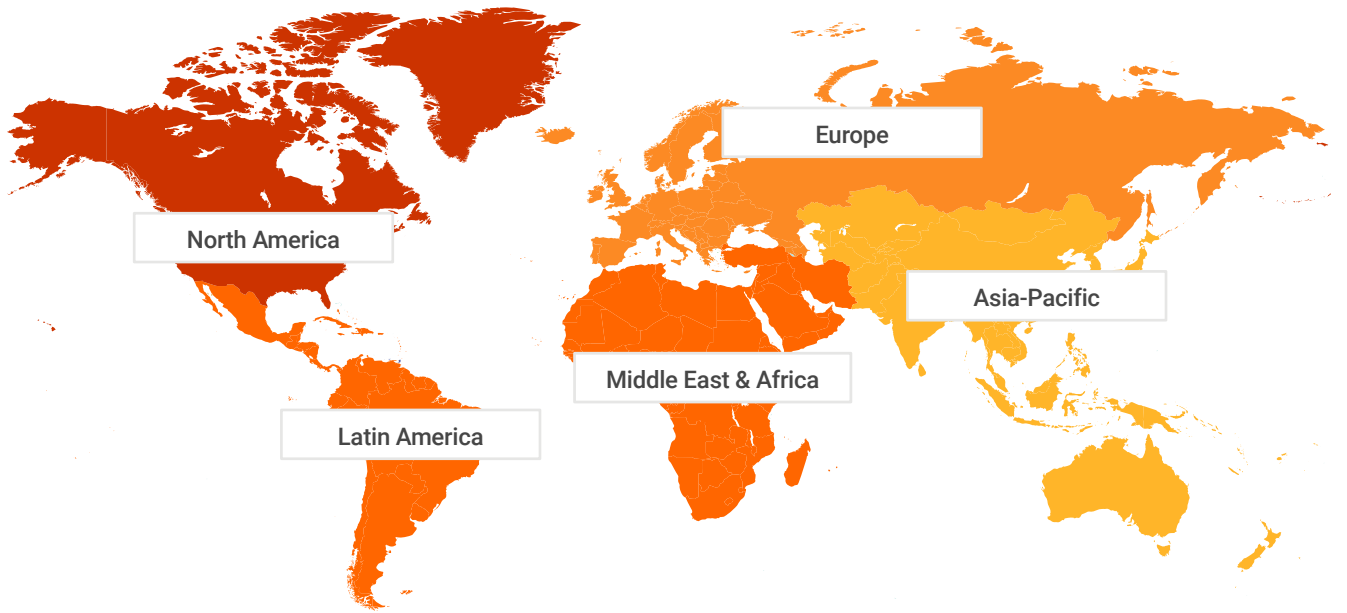
Beach Destination
One of the main tourist draws is the beach

Metropolitan Destination
A major, highly populated city

Sightseeing/Recreational Destination
A destination known for famous landmarks, sights, or activities

Regional Coverage

Sojern breaks down the world into the following regions:



Methodology

Sojern’s quarterly insights reports are based on the rigorous analysis of more than a billion traveler intent data points, obtained through Sojern’s unique partnerships with some of the world’s most renowned travel brands. The data provided is not a complete view of all global traveler information, as different data sources provide additional views of traveler behavior.

1 Travel searches for July, August, September 2017.
2 Sojern. 2017. From Search Engine to Booking Engine: Sojern’s 2017 Hotel Report.
3 Elki, Tobi. April 6, 2016. MediaPost. “Mobile Native Advertising to Drive \$53 B in Ad Spend.”
4 Phocuswright. 2016. Global Online Travel Overview: 4th Edition.





Sign Up for More Insights

www.sojern.com/mailling-list/