

World and Tourism Outlook

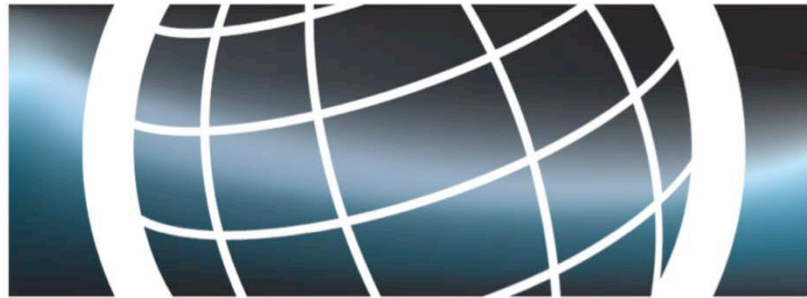
Luc Durand
Ipsos

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MARKETING OUTLOOK FORUM: A GLOBAL PERSPECTIVE



Presented by the Travel and Tourism Research Association

World and Tourism Outlook

Presented by: Luc Durand, Ipsos

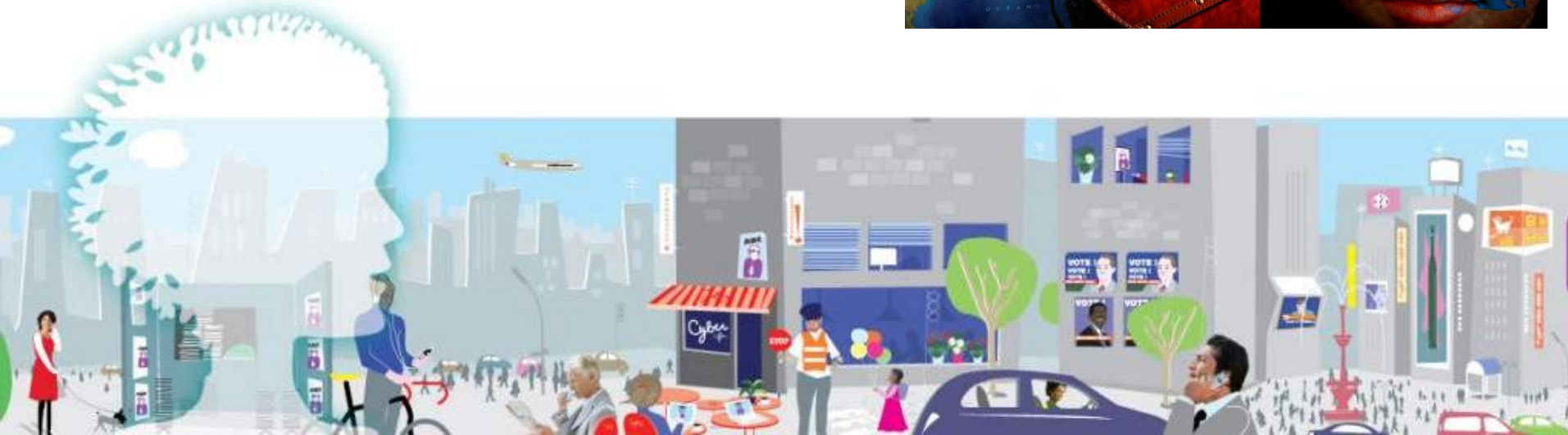
For more information, contact Luc at luc.durand@ipsos.com

October 28-30, 2013 ~ The Drake Hotel ~ Chicago, Illinois, USA



World & Tourism Outlook

Luc Durand
President, Ipsos - Quebec



Ipsos: A World Leader in T&T Research

- Ipsos is the third largest research company in the world
- Every year, **our researchers conduct more than 20 million interviews across the globe**
- Ipsos is also a specialist in Tourism & Travel research and conducts T & T research globally.

85 countries with key positions across all the main regions



Methodology

Methodology

Web survey in **24 countries:**

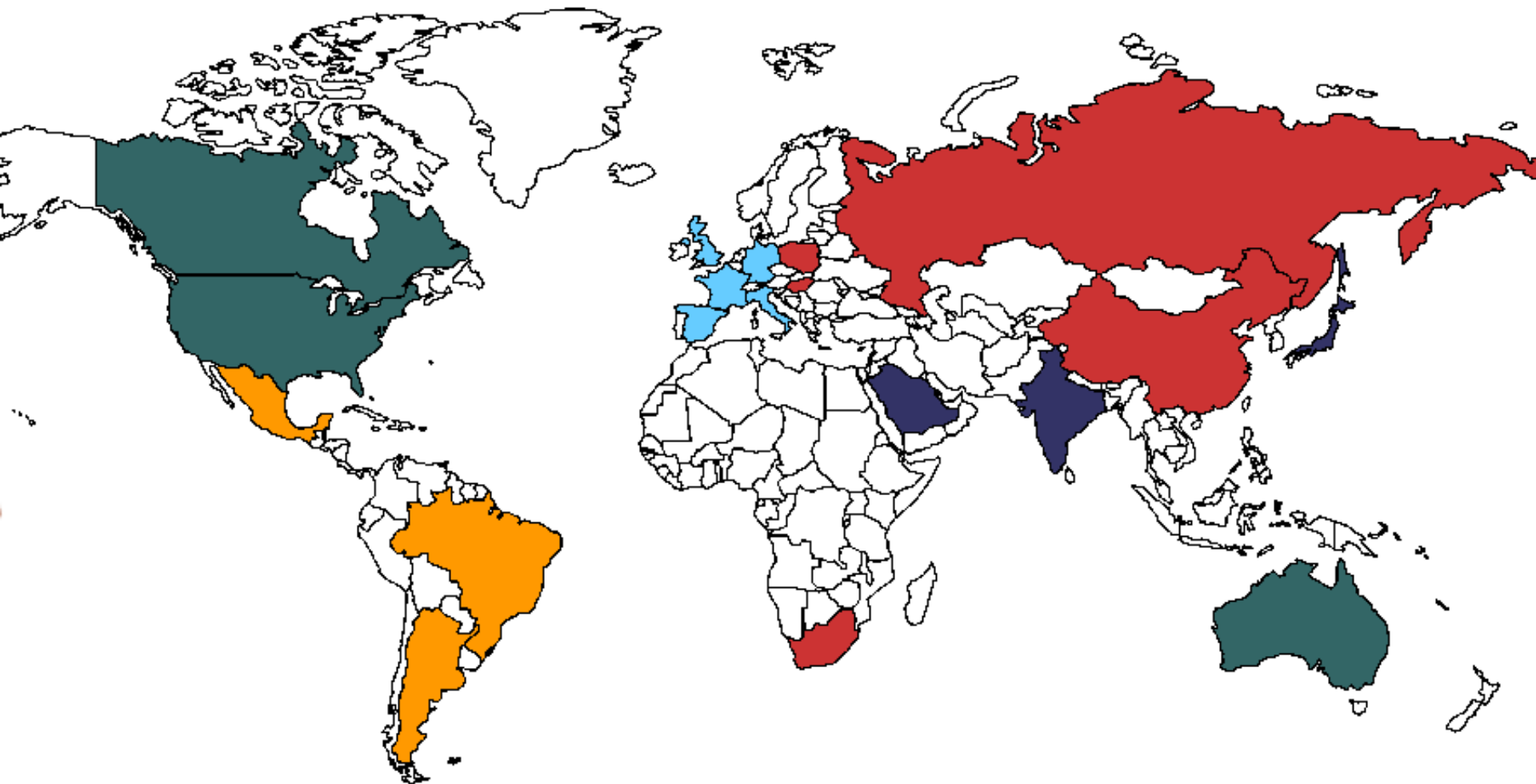
Australia,	Germany,	Russia,
Argentina,	Hungary,	Saudi Arabia,
Belgium,	India,	South Africa,
Brazil,	Indonesia,	South Korea,
Canada,	Italy,	Spain,
China,	Japan,	Sweden,
France,	Mexico,	Turkey,
Great Britain,	Poland,	The United States of America

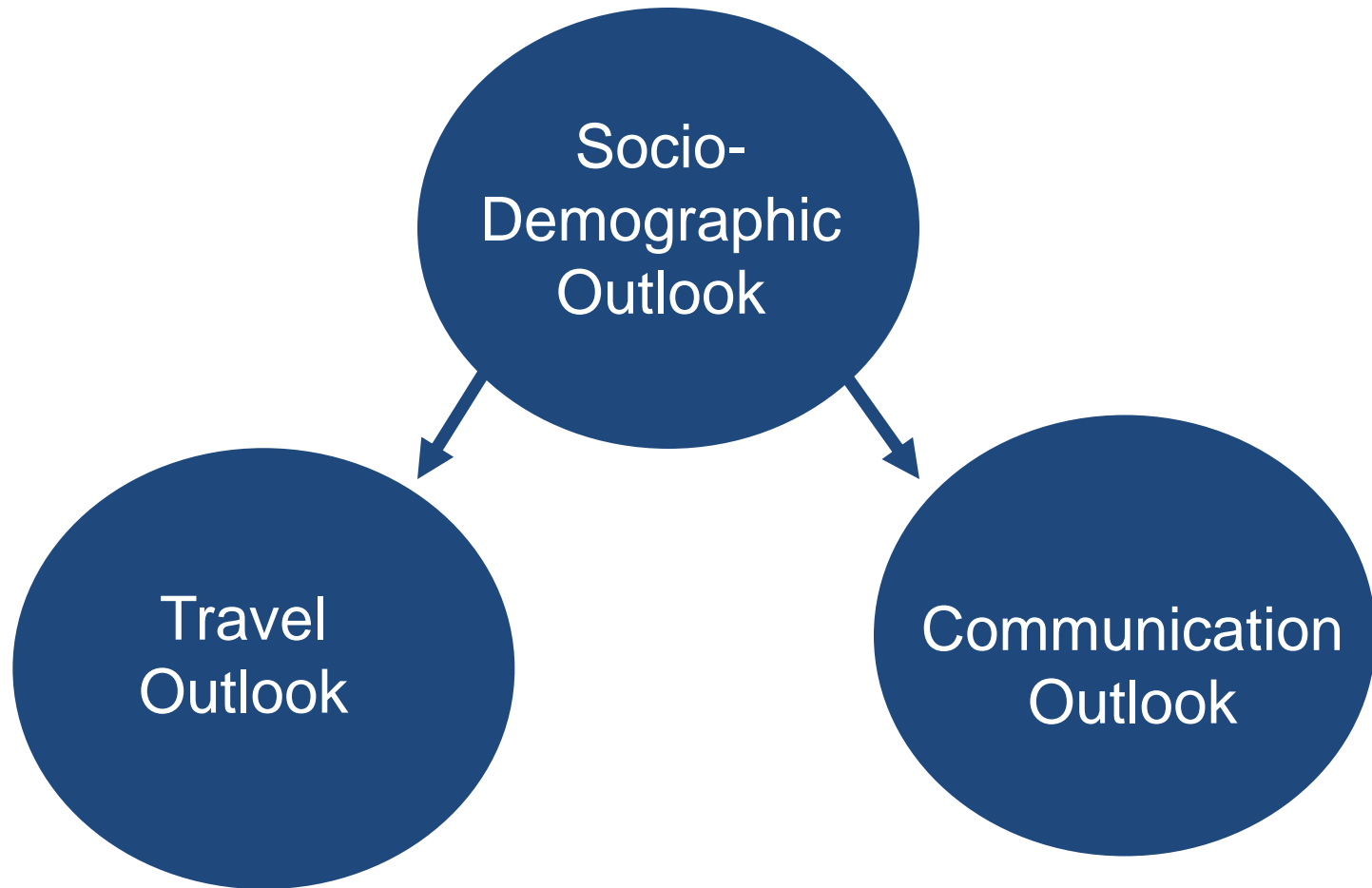
Target Adults 16+

Sample size **18,778 adults**
(1,000+ or 500+ per country)

Data collection Wave 1 November 2010

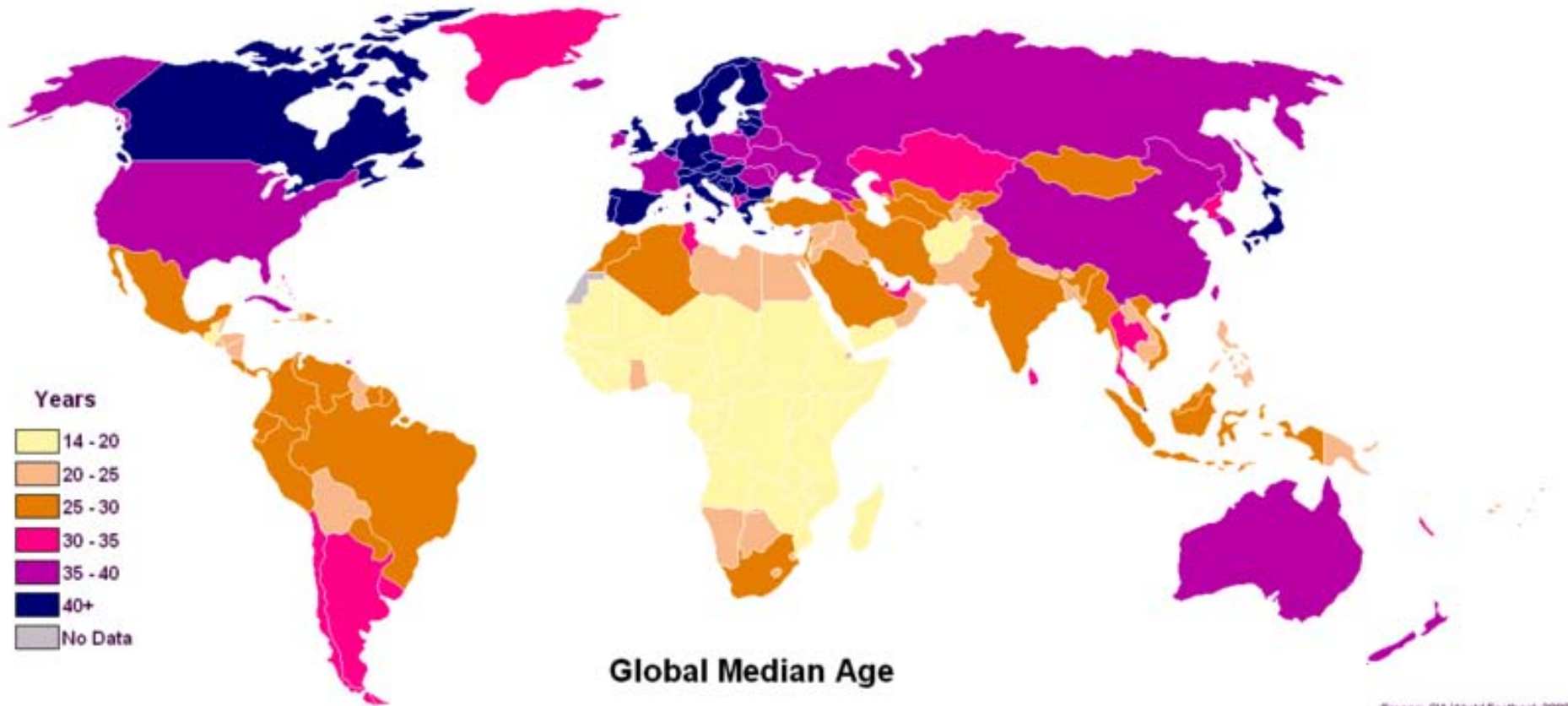
Wave 2: October 2012



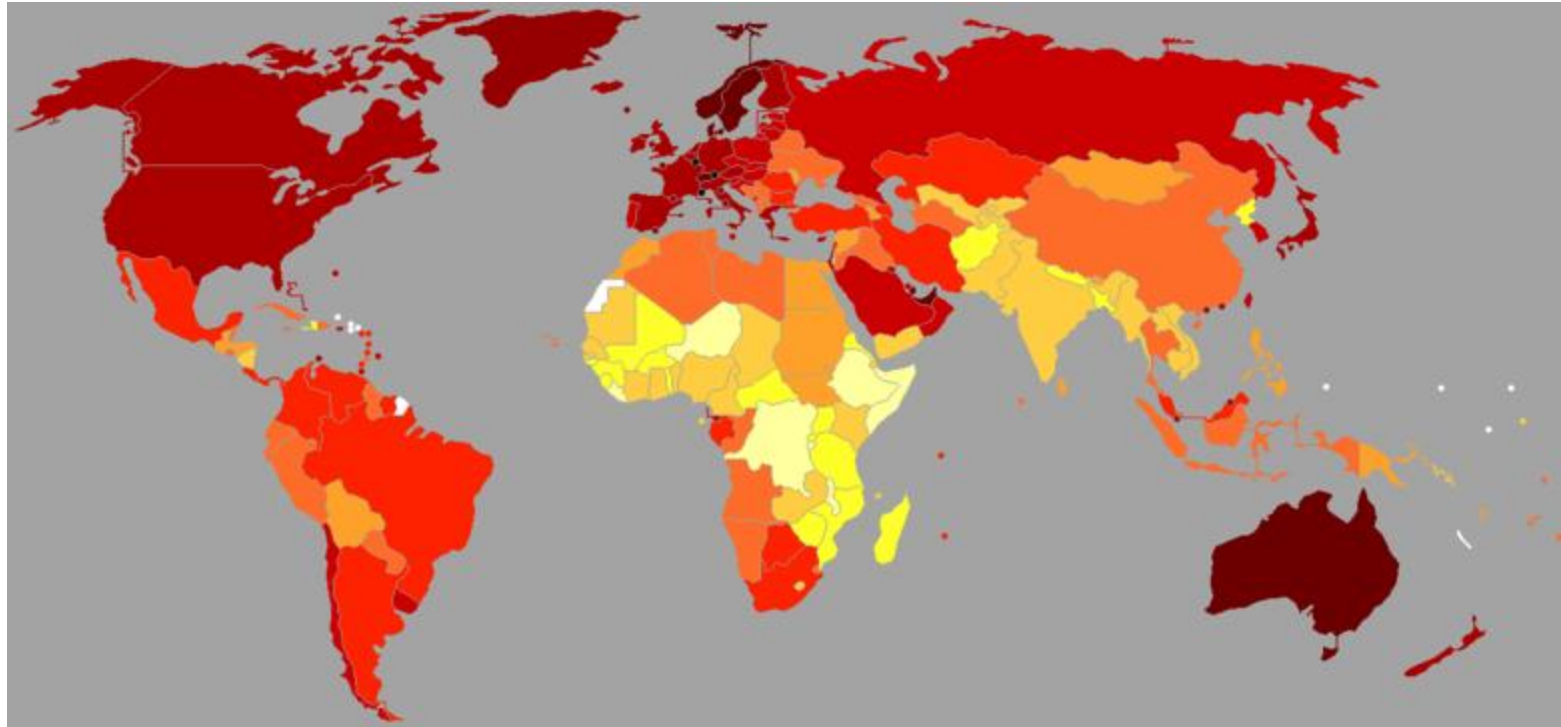


Socio- Demographic Outlook

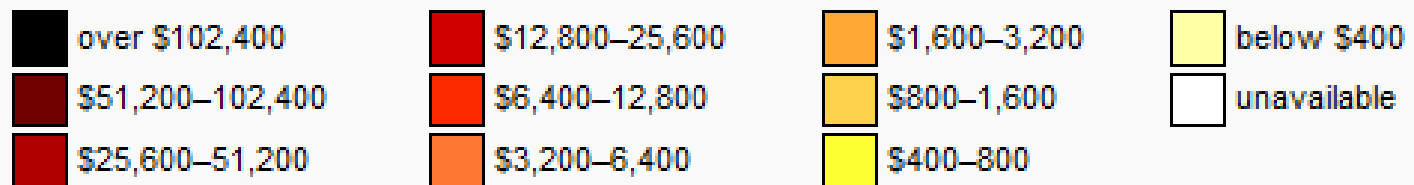
Global socio-demographic portrait : Median age per country



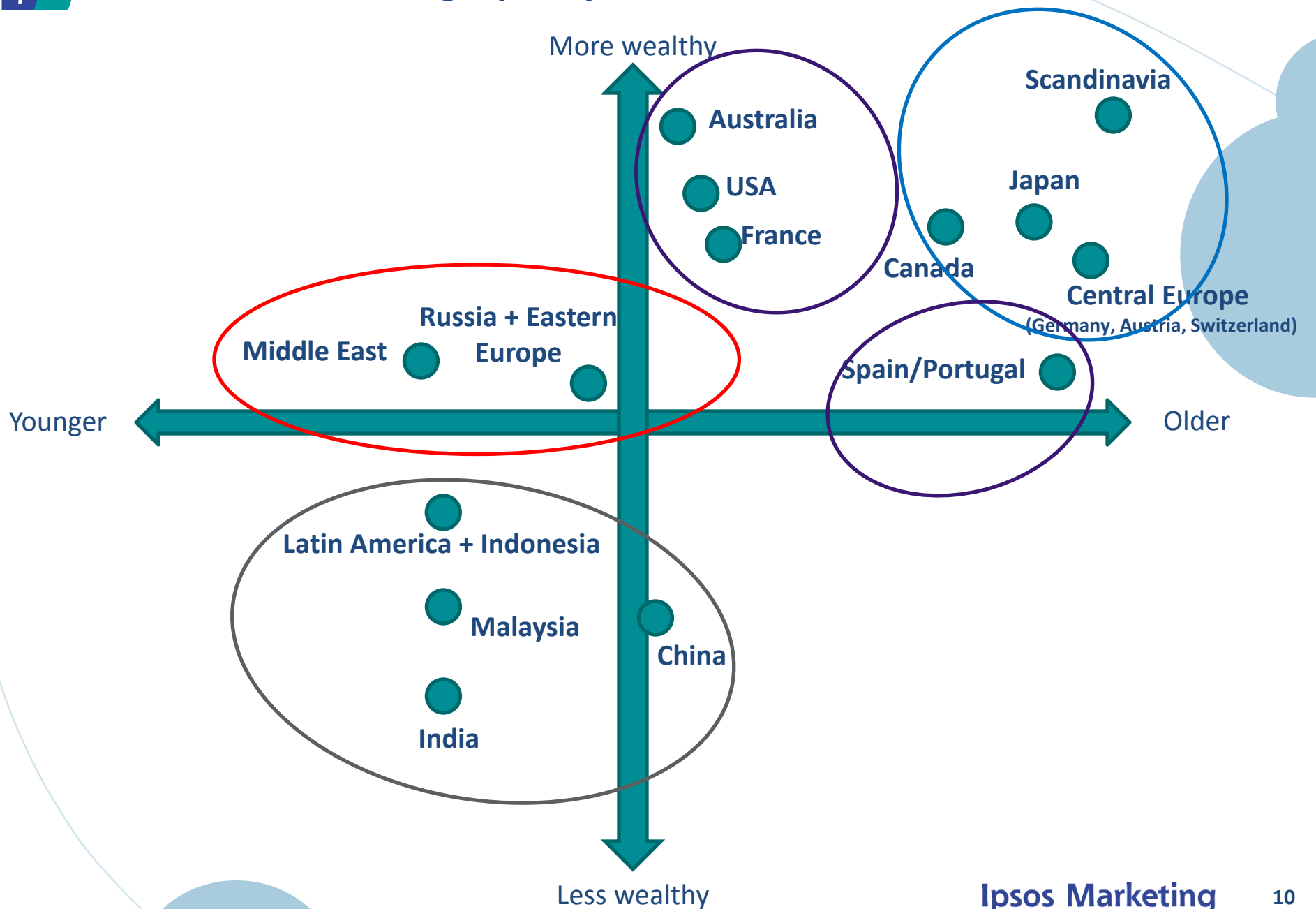
Global socio-demographic portrait : Gross Domestic product per capita



Countries by 2011 GDP (nominal) per capita.^[1]



Global socio-demographic portrait



Wishes for Next Year

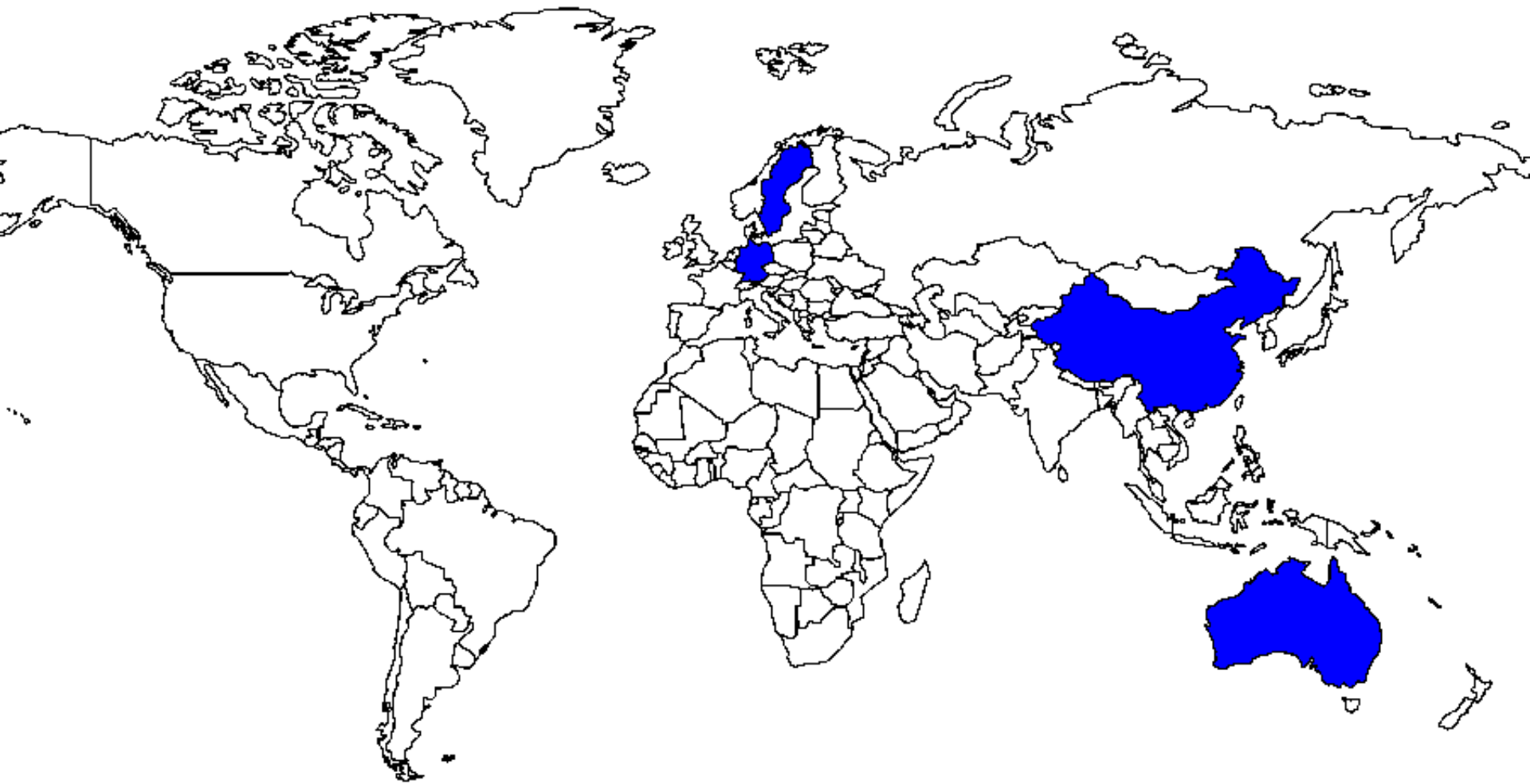
	Travel to other countries	Improve my financial situation	Spend more time with friends and family	Improve my health
Sweden	21%	29%	26%	19%
China	18%	43%	16%	20%
Australia	18%	42%	16%	19%
India	17%	53%	14%	15%
Turkey	17%	60%	17%	4%
Saudi Arabia	16%	59%	13%	9%
Germany	16%	35%	15%	23%
South Korea	15%	55%	13%	15%
Italy	15%	54%	16%	11%
Russia	14%	60%	8%	16%
Great Britain	14%	42%	20%	18%
Japan	14%	41%	17%	19%
Indonesia	12%	65%	14%	9%
Canada	12%	47%	16%	19%
France	11%	40%	34%	9%
Belgium	10%	45%	20%	18%
Poland	8%	64%	13%	13%
South Africa	7%	70%	11%	11%
United States	6%	50%	19%	21%
Mexico	6%	74%	12%	7%
Argentina	6%	73%	11%	6%
Hungary	6%	68%	13%	10%
Brazil	5%	75%	11%	7%
Spain	5%	67%	13%	9%



Money is the number one wish for 2013, but less within the countries who are eager to travel.

Sweden, China and Australia are the countries who wish most to travel in 2013.

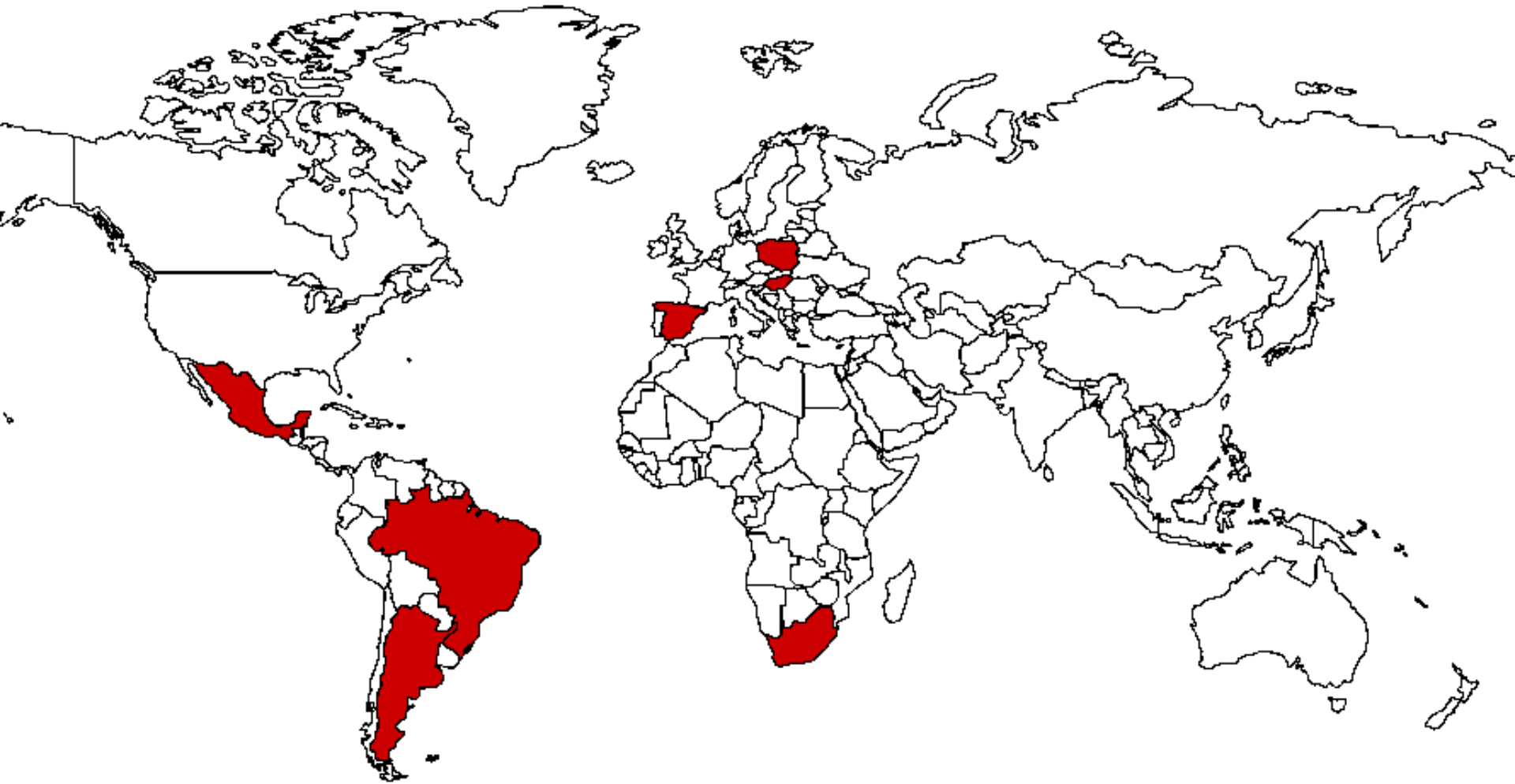
“I want to travel more and I can afford it, so I will”



“I want to travel but money could be an issue and limit my ability to do so”



“I’m too broke to travel right now, my financial situation is the priority”

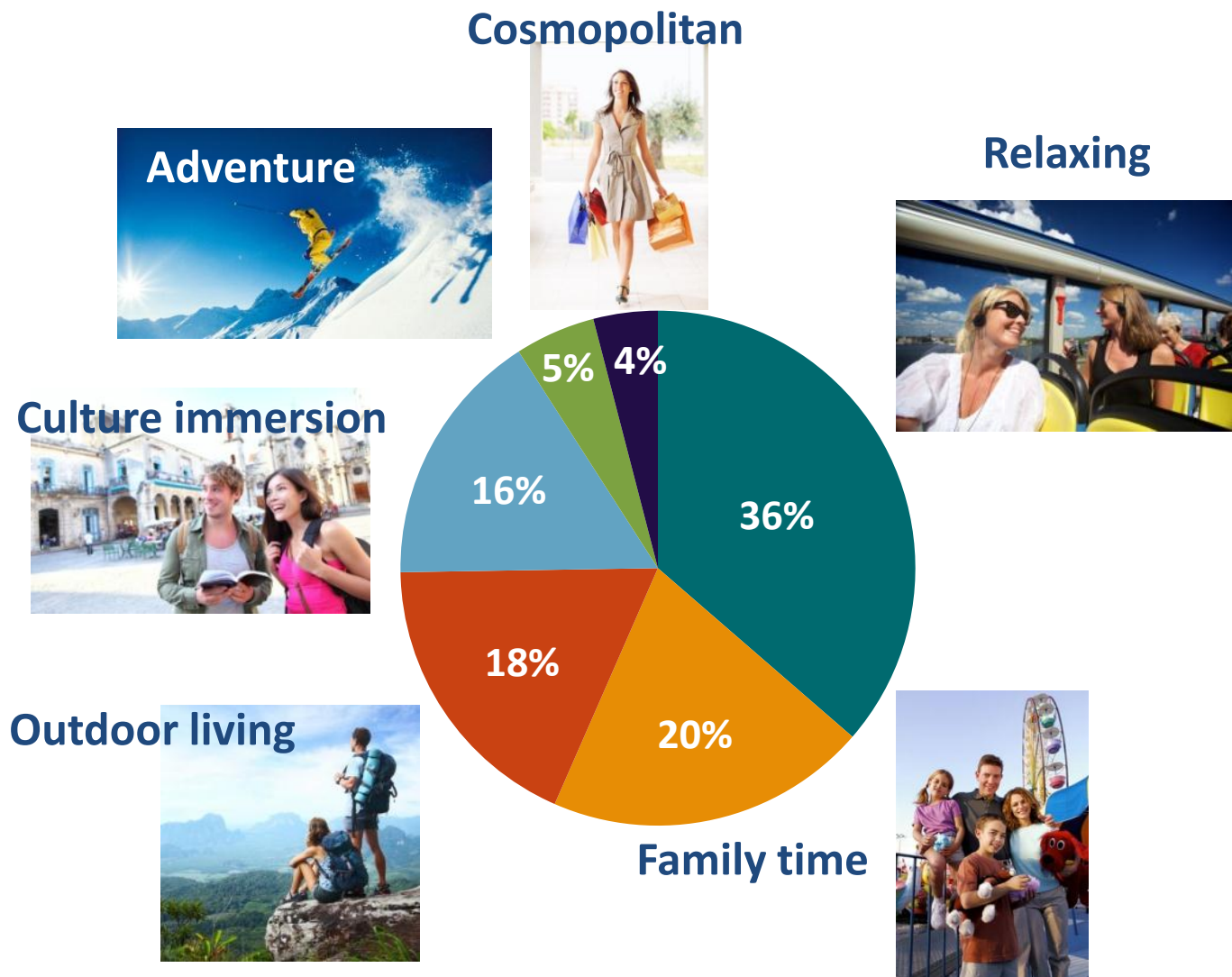


“My priority is improving my health, I’m getting old”

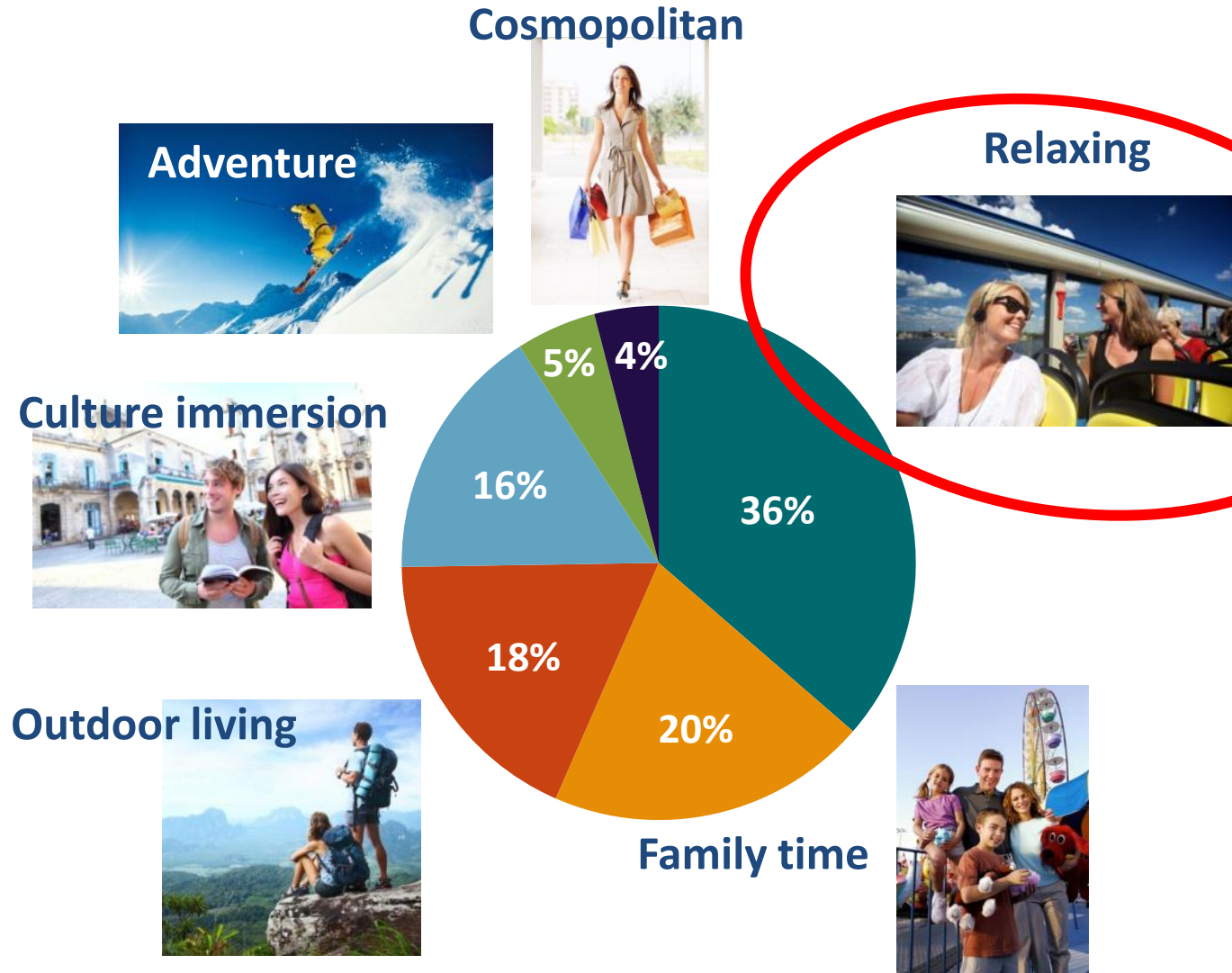


Traveling Outlook

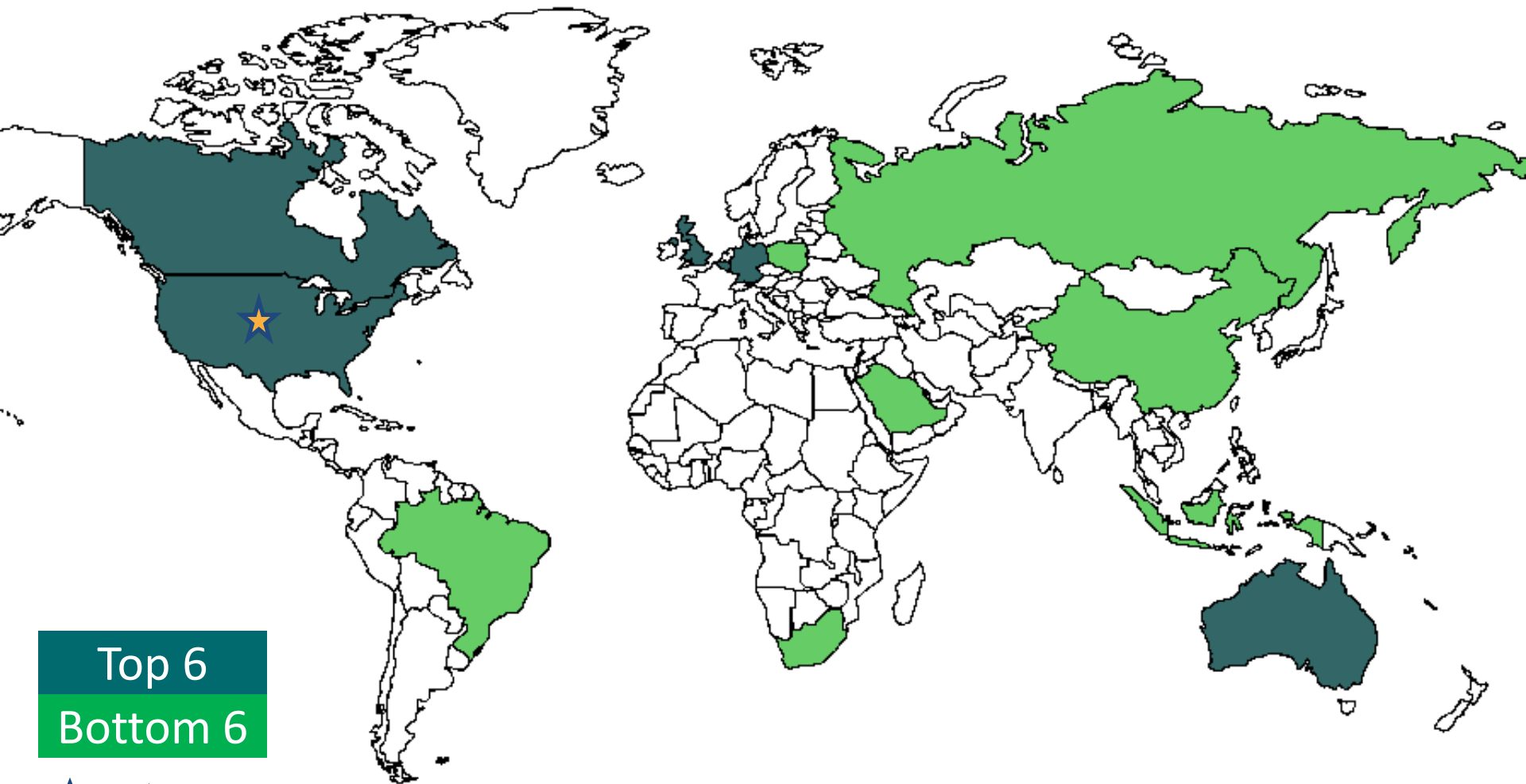
The Primary Type Of Pleasure Trip/Vacation That Appeals Most To Consumer Citizens Around The World



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Relaxing – where do they come from?

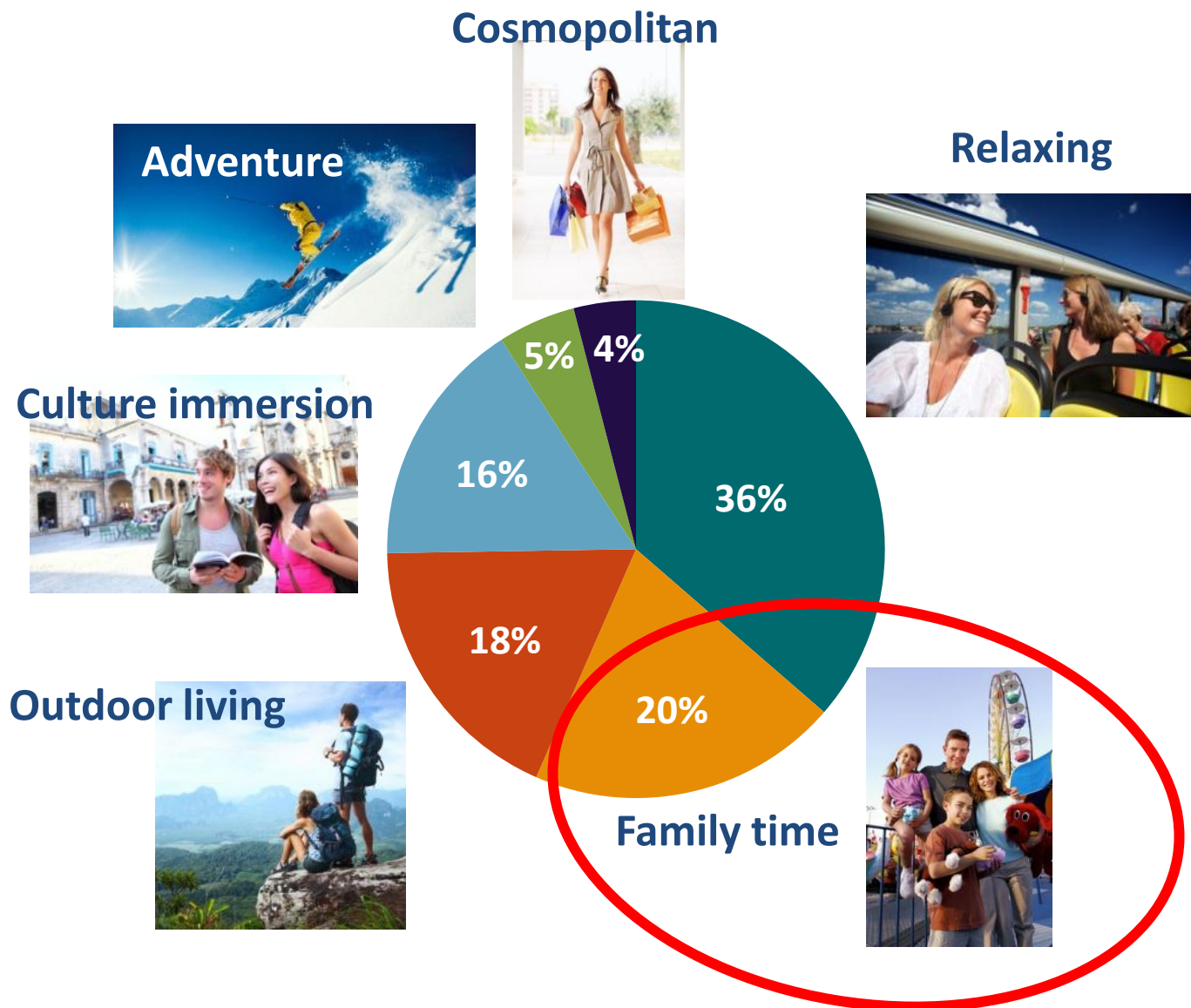


Top 6
Bottom 6

★: ↑% vs 2010

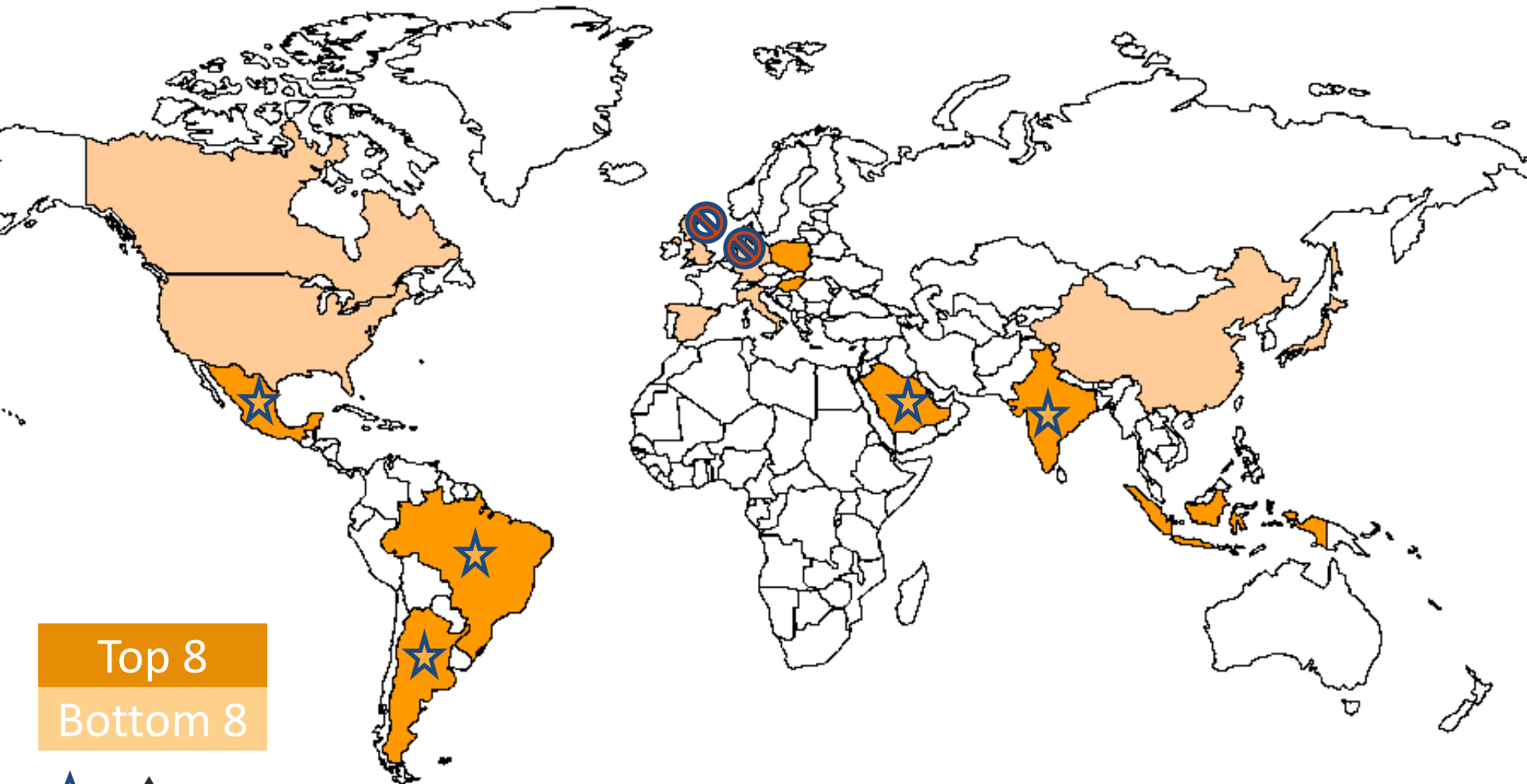
⊘: ↓% vs 2010

The Primary Type Of Pleasure Trip/Vacation That Appeals Most To Consumer Citizens Around The World



Ipsos

Family time – where do they come from?



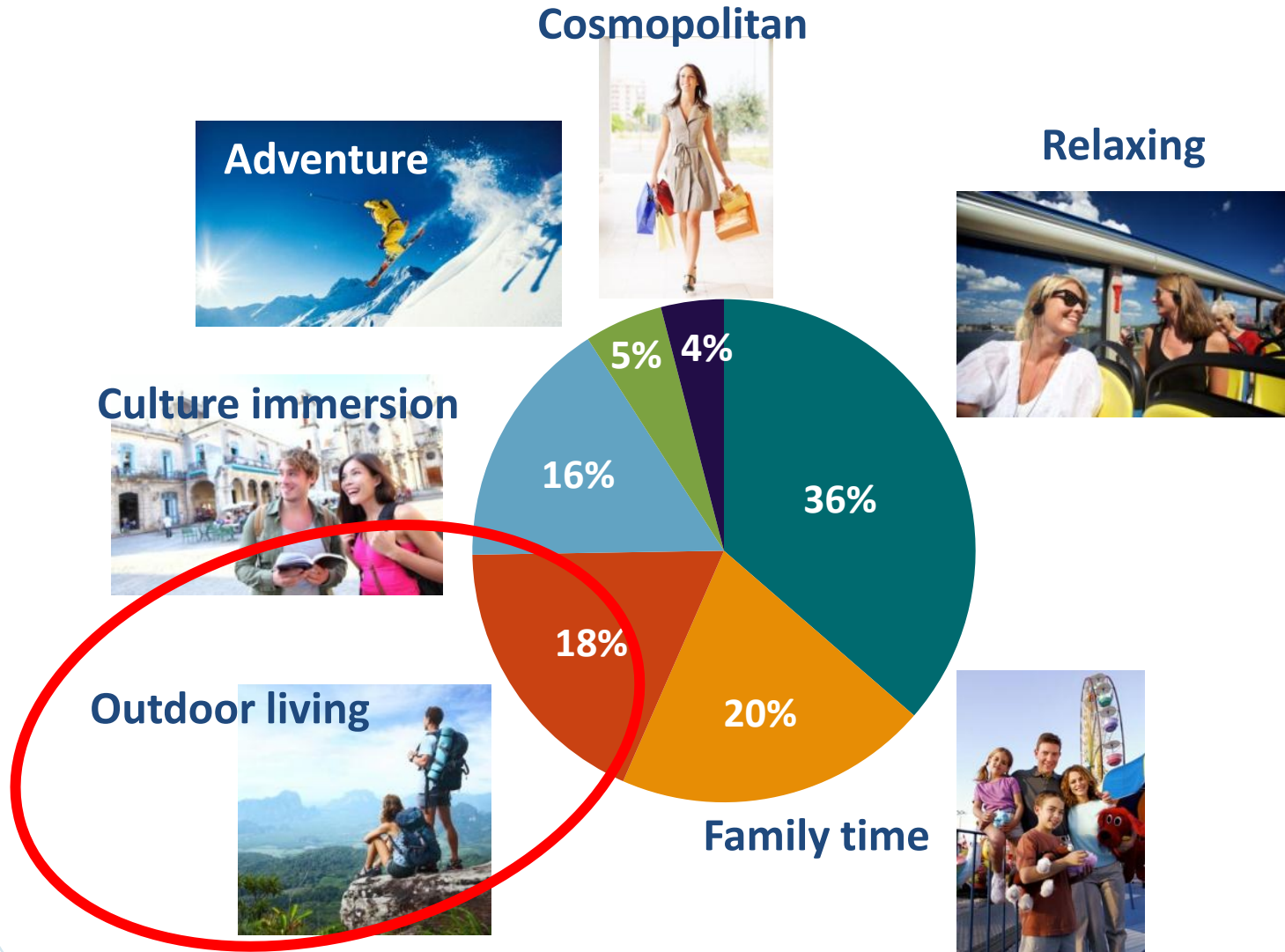
Top 8

Bottom 8

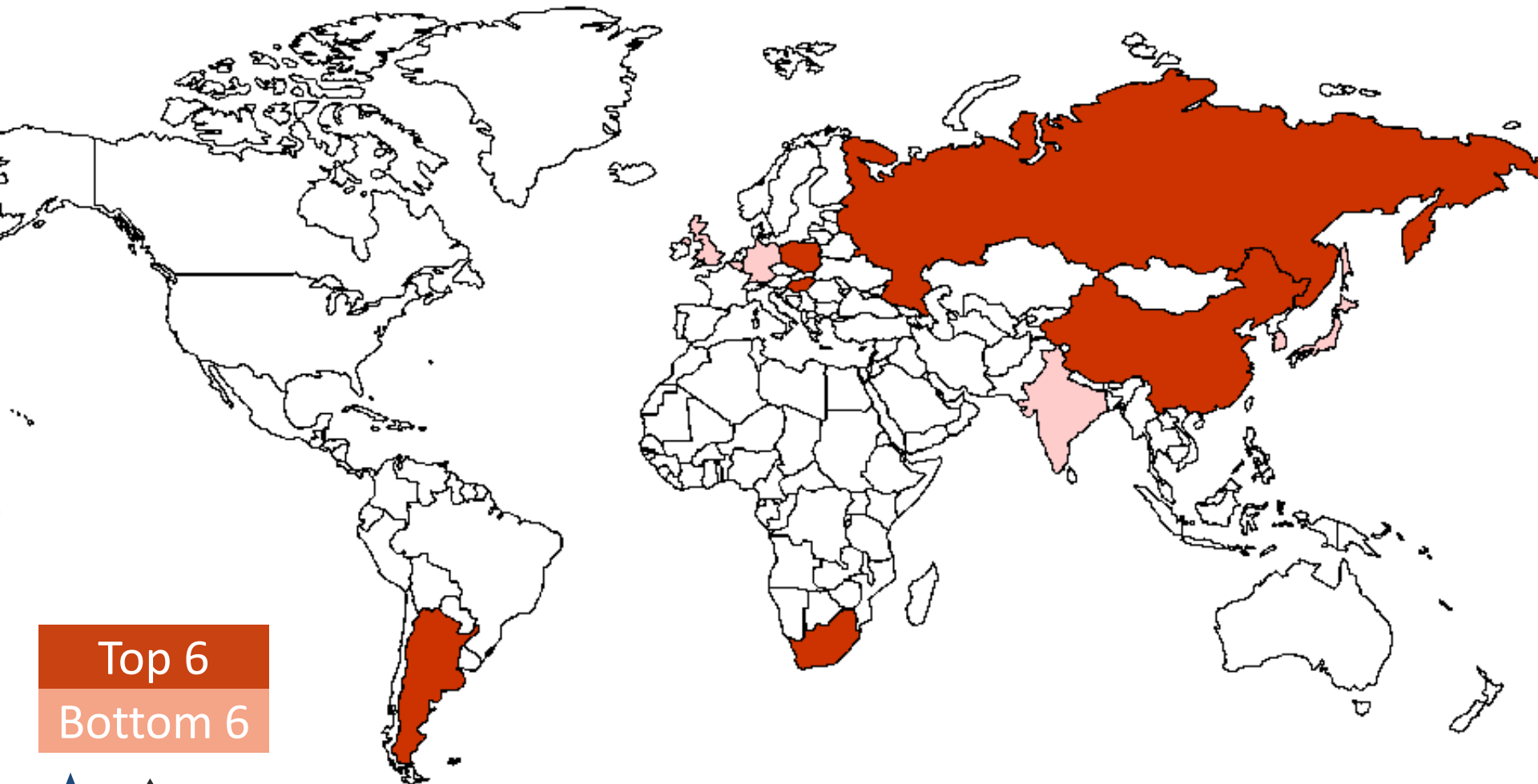
★ : ↑% vs 2010

⊘ : ↓% vs 2010

The Primary Type Of Pleasure Trip/Vacation That Appeals Most To Consumer Citizens Around The World



Outdoor Living – where do they come from?



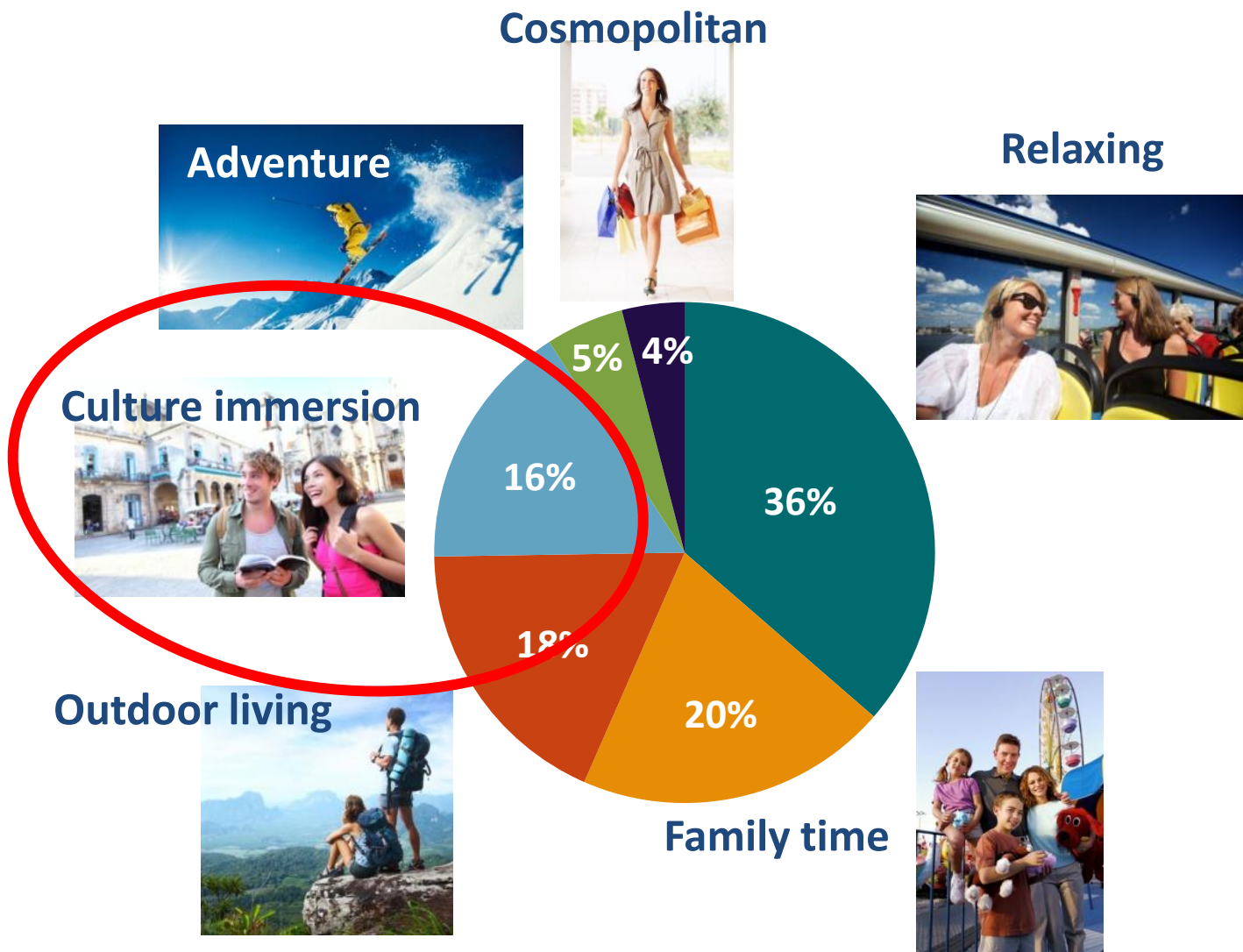
Top 6

Bottom 6

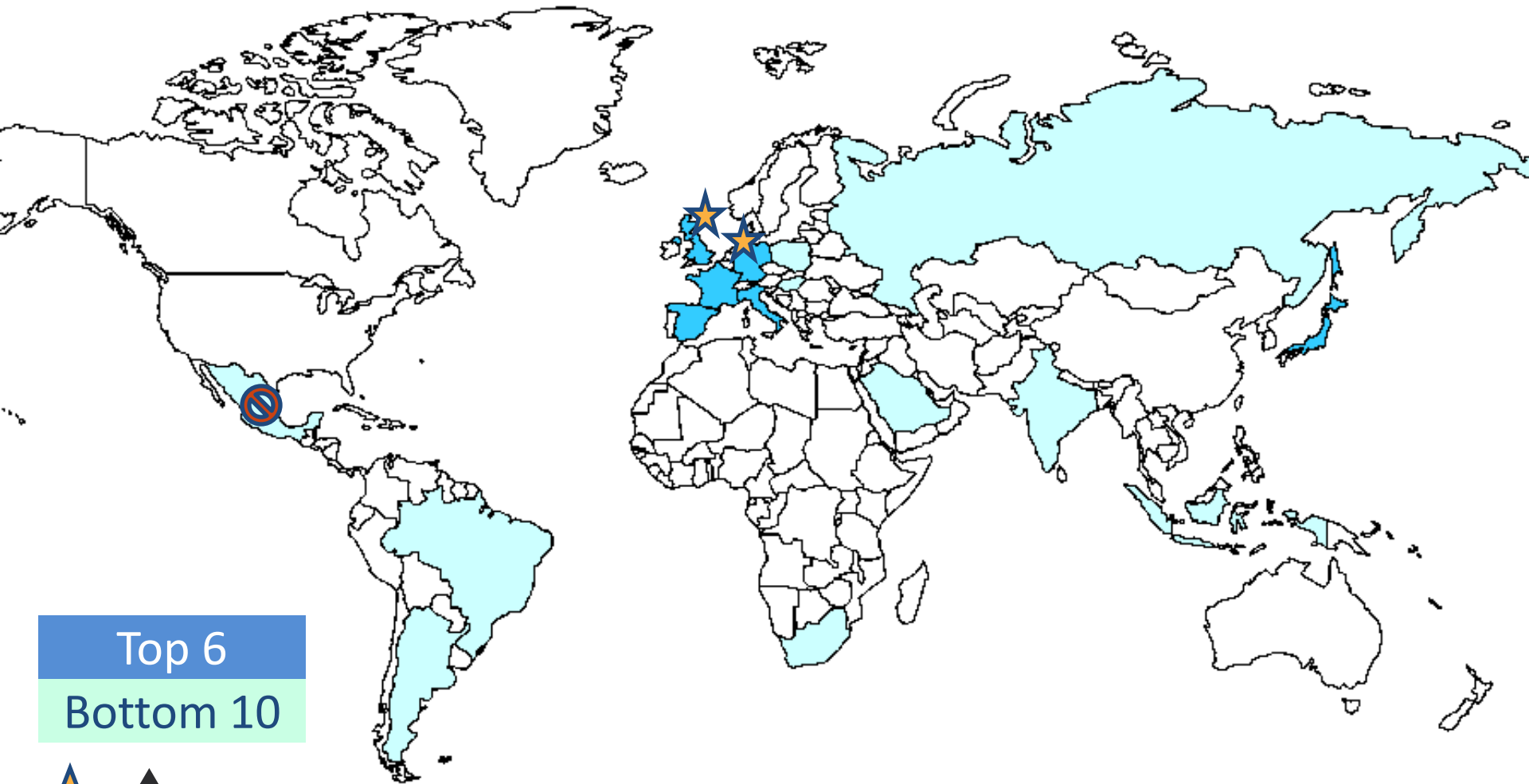
★ : ↑% vs 2010

⊘ : ↓% vs 2010

The Primary Type Of Pleasure Trip/Vacation That Appeals Most To Consumer Citizens Around The World



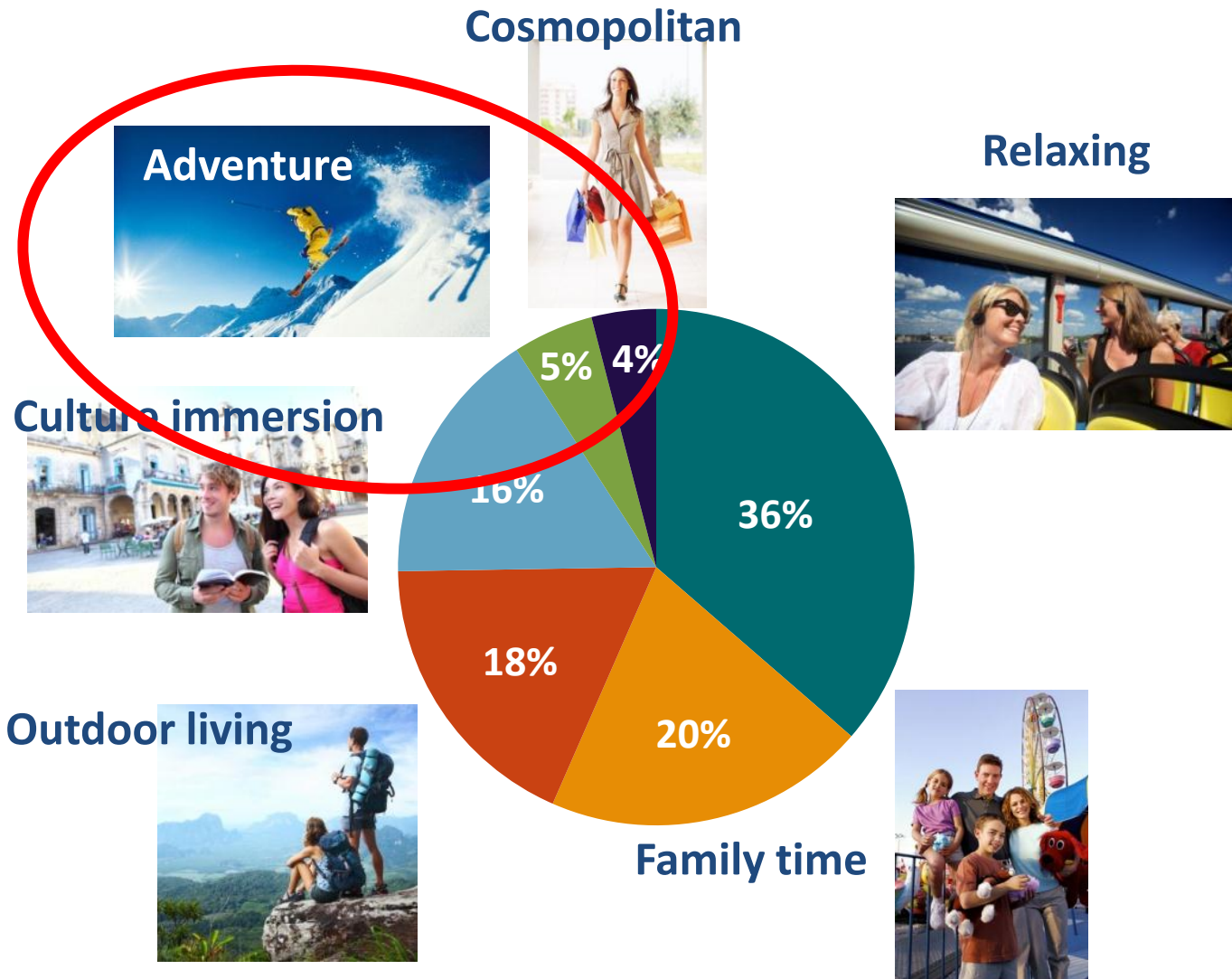
Culture immersion – where do they come from?



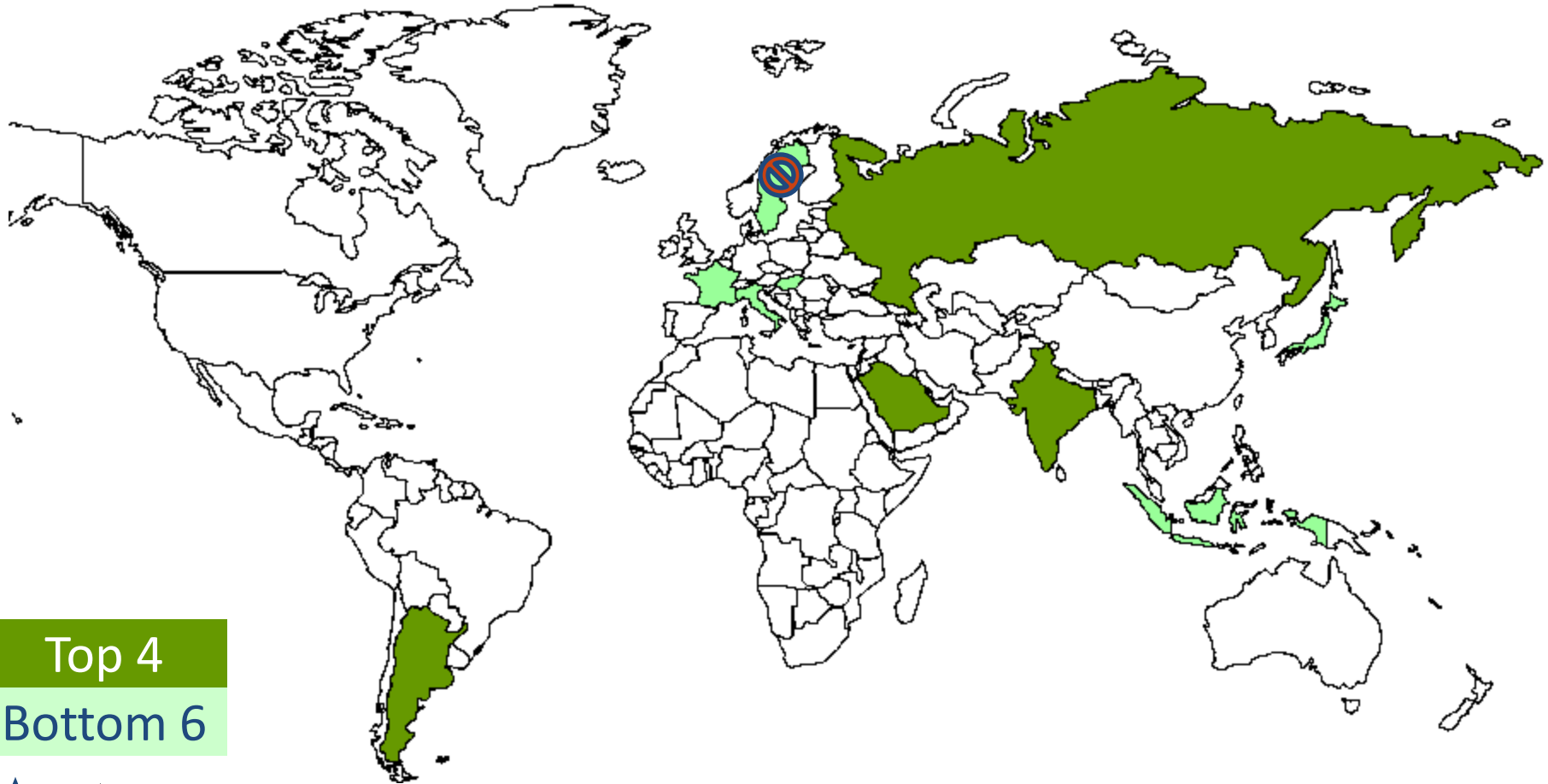
★ : ↑% vs 2010

⊘ : ↓% vs 2010

The Primary Type Of Pleasure Trip/Vacation That Appeals Most To Consumer Citizens Around The World



Adventure – where do they come from?



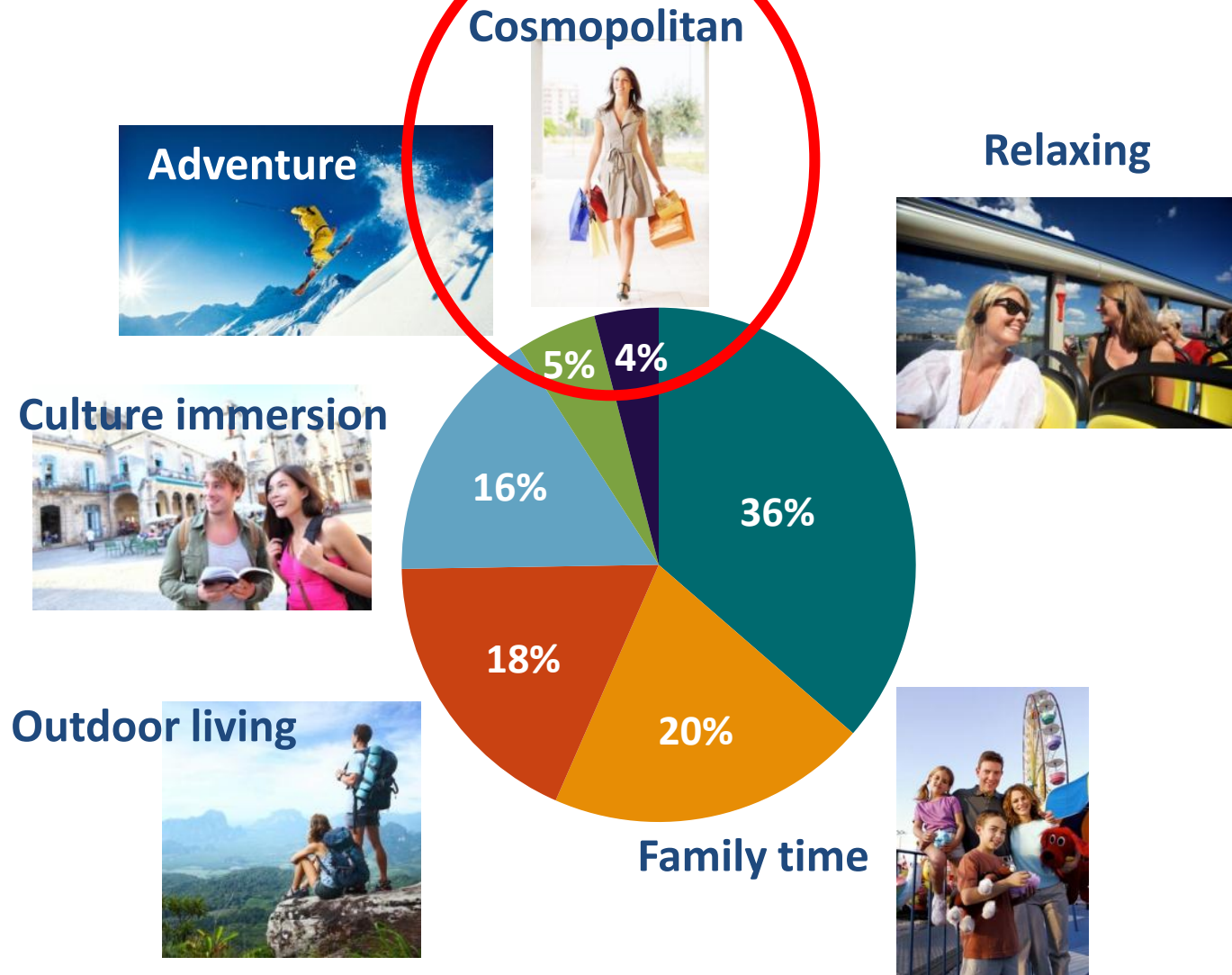
Top 4

Bottom 6

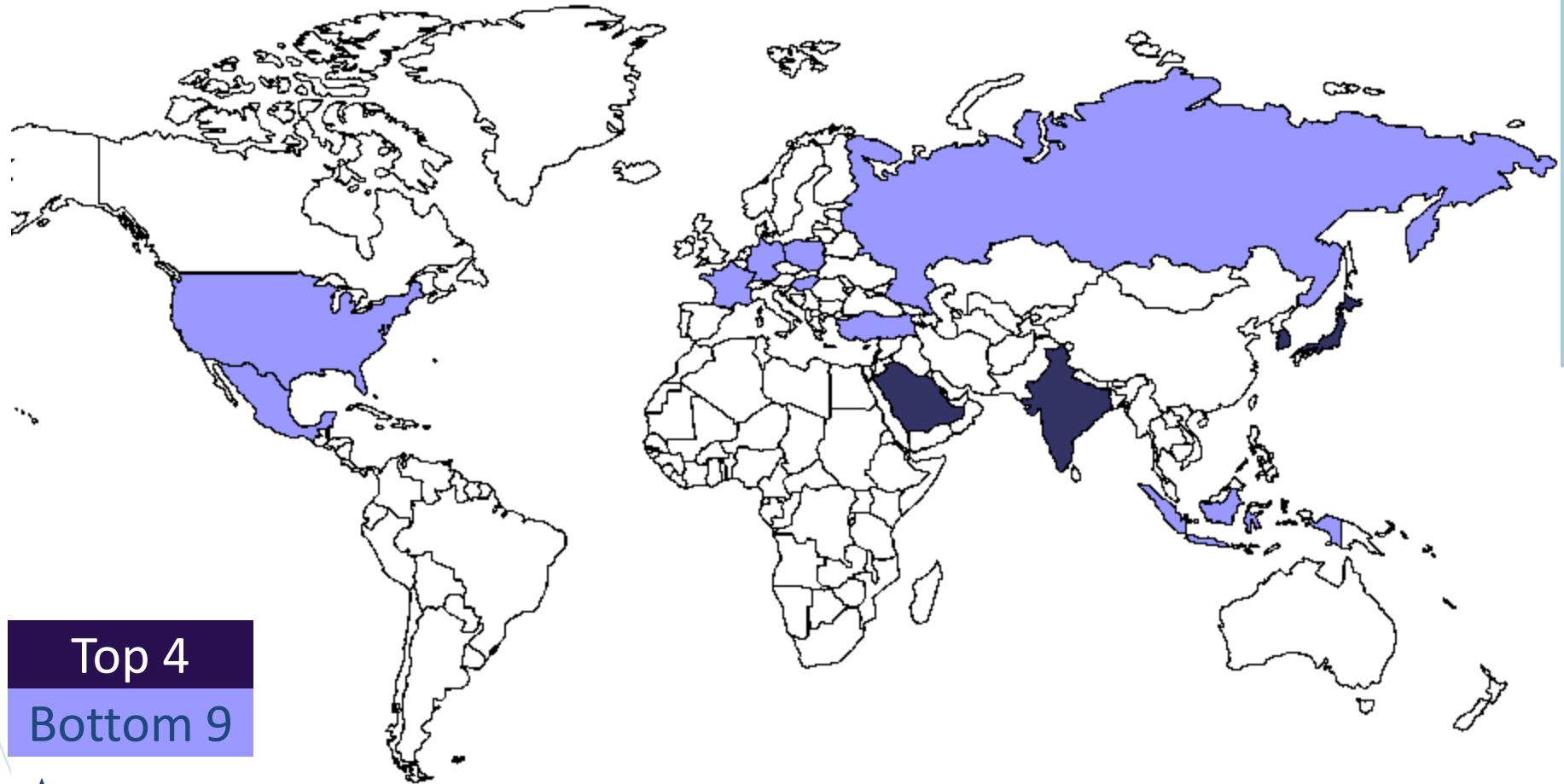
★ : ↑% vs 2010

⊘ : ↓% vs 2010

The Primary Type Of Pleasure Trip/Vacation That Appeals Most To Consumer Citizens Around The World



Cosmopolitan – where do they come from?



Top 4

Bottom 9

★: ↑% vs 2010

⊘: ↓% vs 2010

Top 10 - Up

- **Relax**

- ⇒ USA + 8%

- **Family**

- ⇒ Brazil +9%

- ⇒ Saudi Arabia +9%

- ⇒ Mexico +8%

- ⇒ India +7%

- ⇒ Argentina +9%

- **Outdoor**

- ⇒ China +5%

- **Culture**

- ⇒ Germany +13%

- ⇒ UK +8%

- ⇒ Italy +6%

Top 7 - Down

■ Family

⇒ Germany -6%

⇒ UK -9%

⇒ USA -4%

■ Outdoor

⇒ Belgium -4%

■ Culture

⇒ Mexico -8%

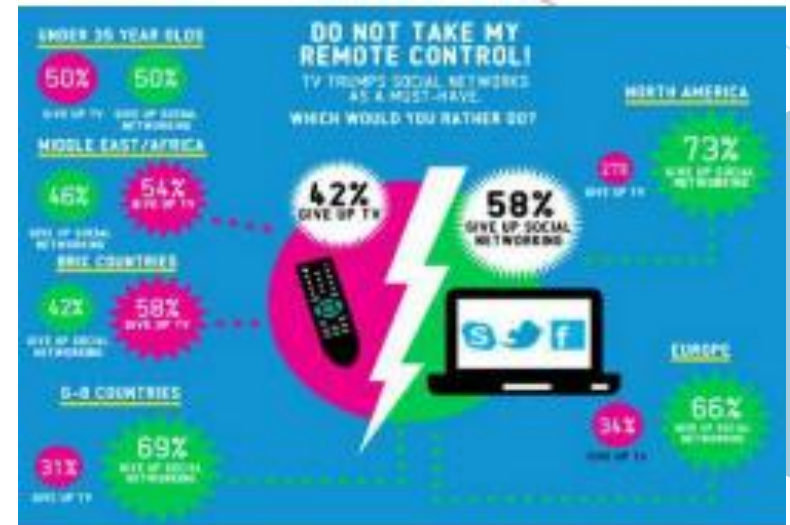
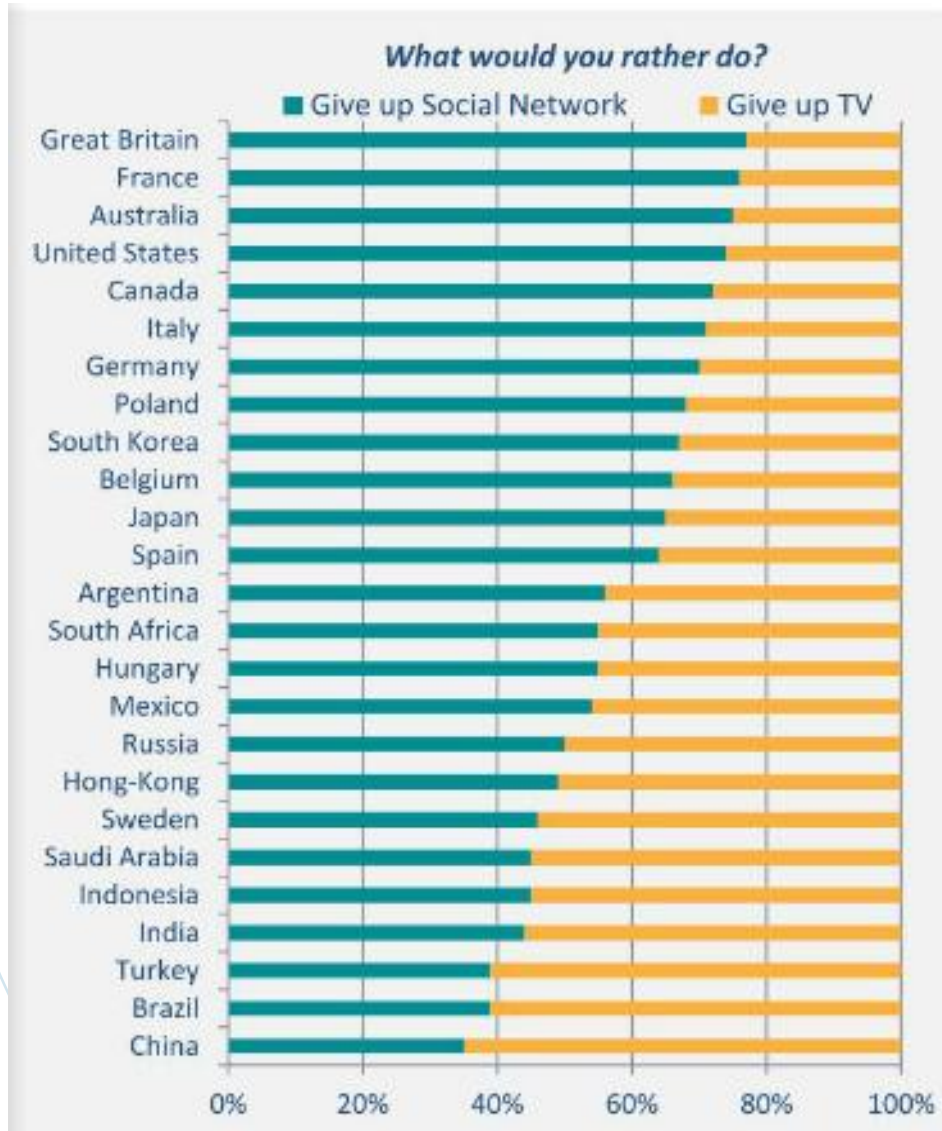
⇒ India -5%

■ Adventure

⇒ Sweden -4%

Communicating Outlook

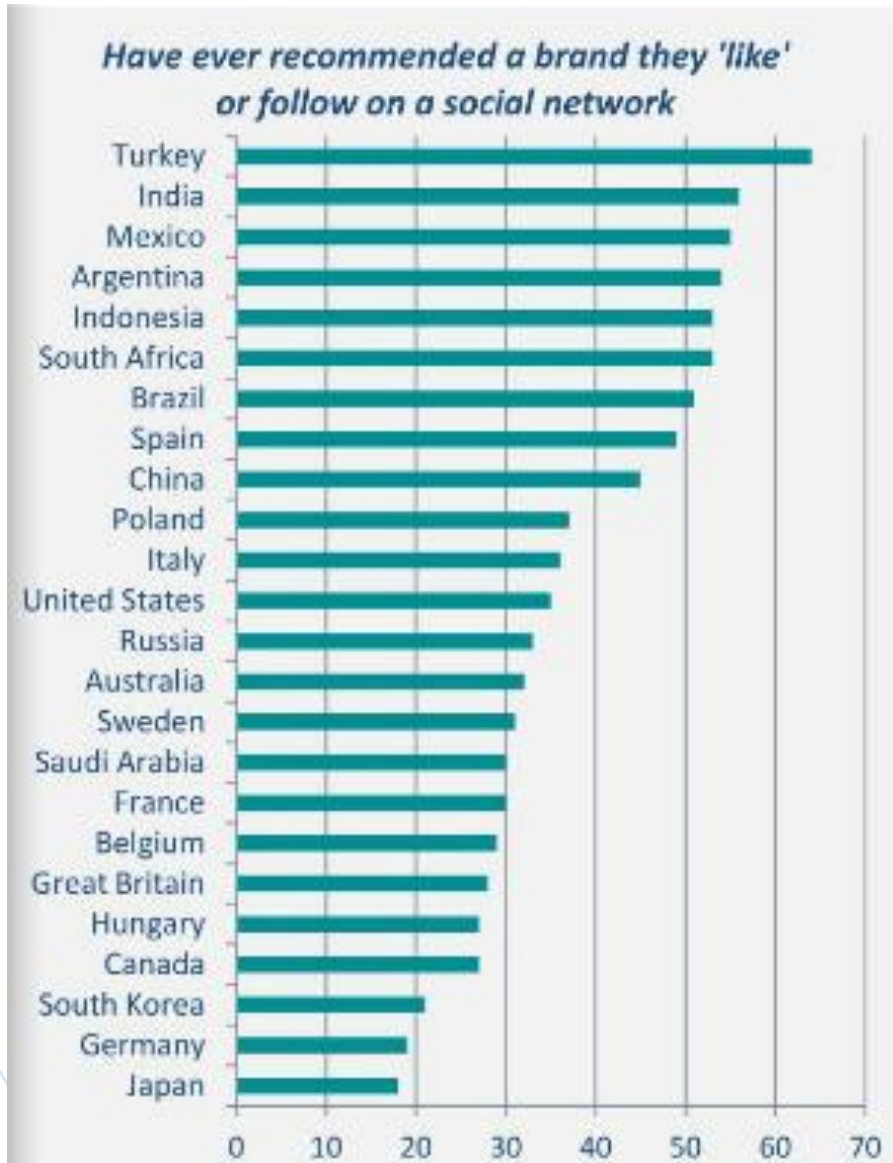
Give up social network or TV ?



Television is still king.
North America, Europe and the G-8 Countries are most likely to prefer TV over social networking.

While the BRIC countries and Middle East and South Africa are most likely to prefer social networking to TV.

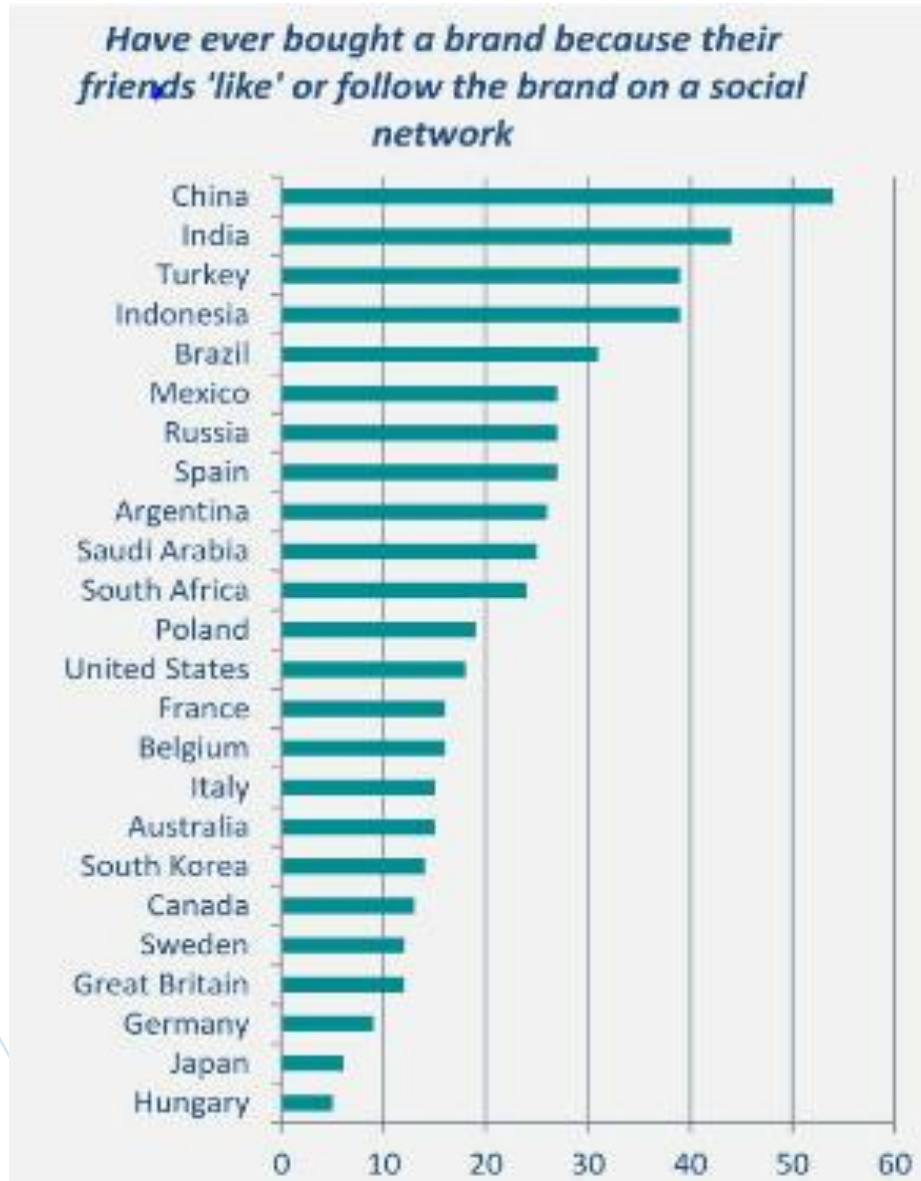
Have you ever recommended a brand you « like » or follow on a social network



Nearly 40% of people have recommended a brand they « like » or follow online.

Latin American are more likely than others to recommend a brand they « like » or follow.

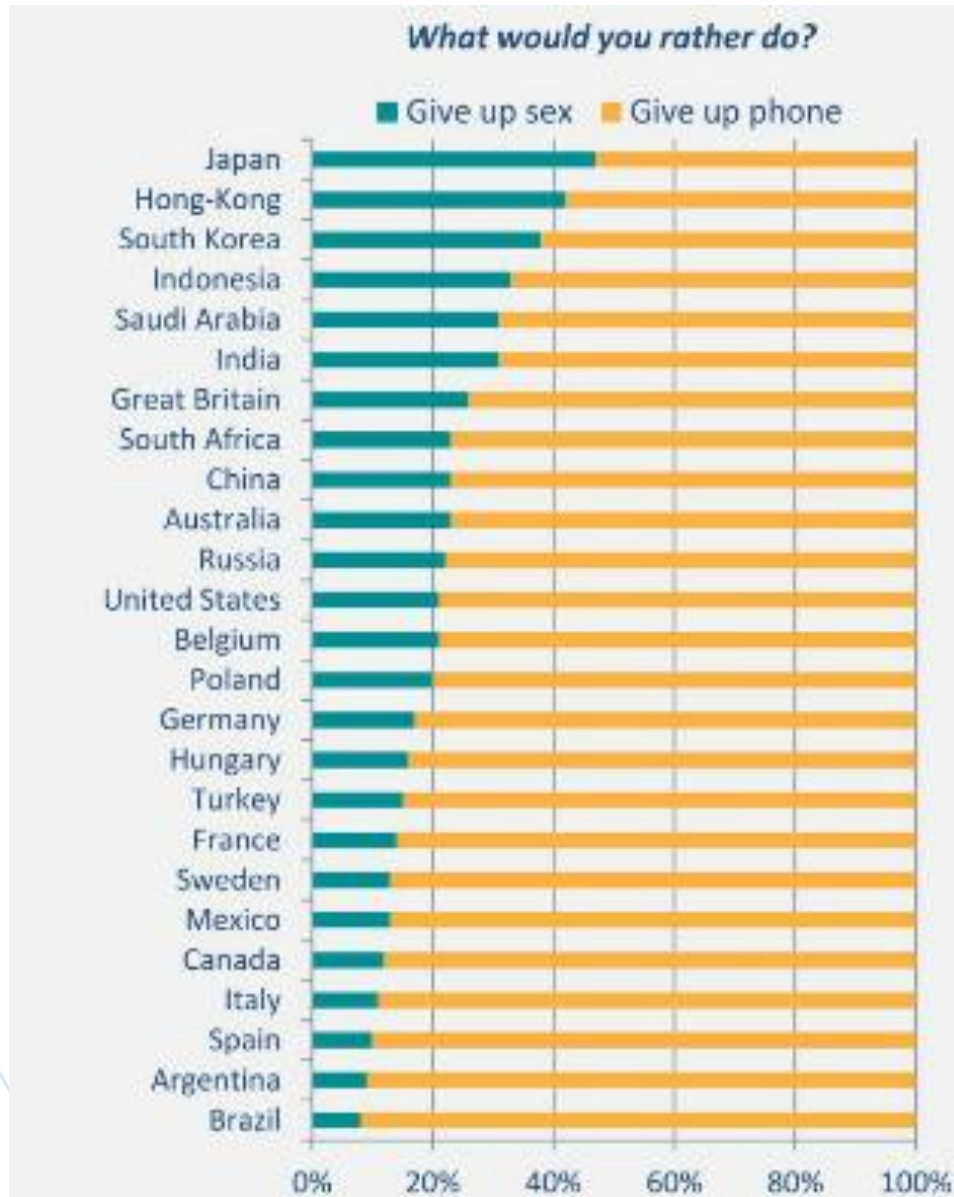
Have you ever bought a brand because your friends « like » or follow the brand on a social network



Nearly 25% people say they would buy a brand because a friend « likes » or follow the brand on a social network.

In the BRIC countries, that number rises to 39%.

Give up sex or your phone ?



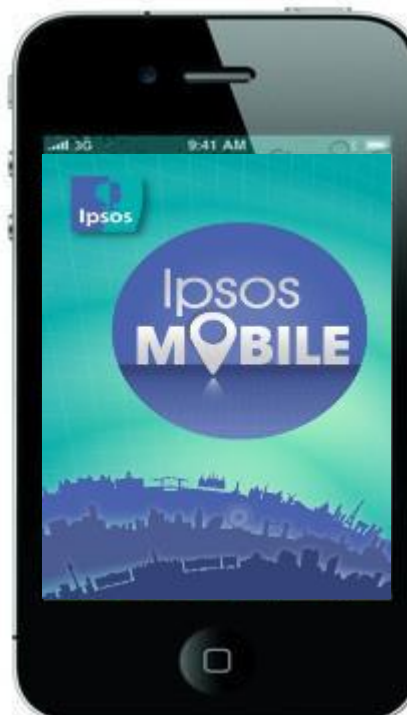
22% (and 30% females) would give up sex before they would give up their phones.

This varies by region, with Latin Americans less likely to give up sex (10%) and people from APAC countries more likely to (31%).



MOBILE WEB

- New Approaches to Traditional Surveys – mobile online
- More visually engaging experience
 - E-mail > Web survey Question & Answer
 - Feature- & Smartphone
 - Full survey capabilities
 - Online only



MOBILE APP

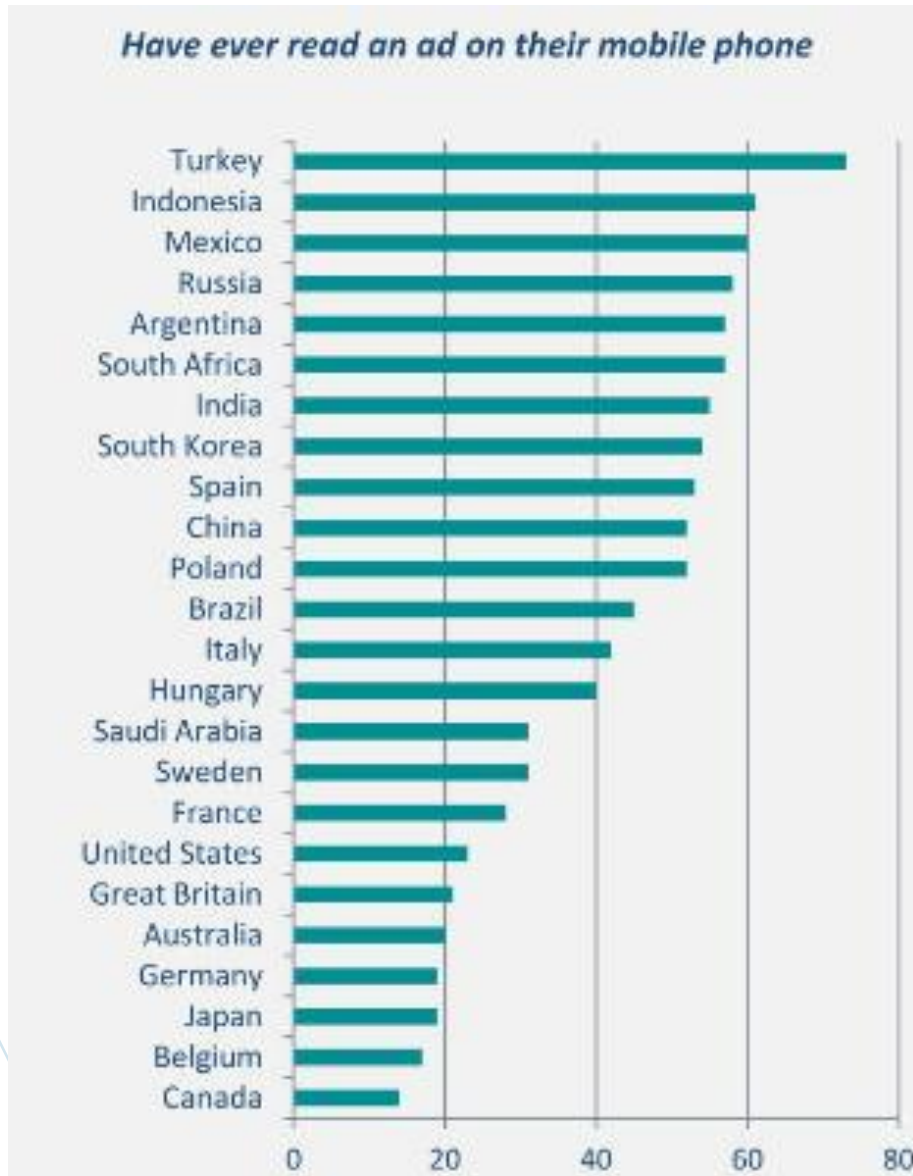
- A mobile survey research platform for Android, iPhone, BB, Symbian and Java-based Smart/Feature Phones,
- App > Survey Question, Answer & Task based research
- Full survey capabilities
- Camera/Video response/capture
- GPS
- Online & Offline
- Reminders/notifications



QUAL APP

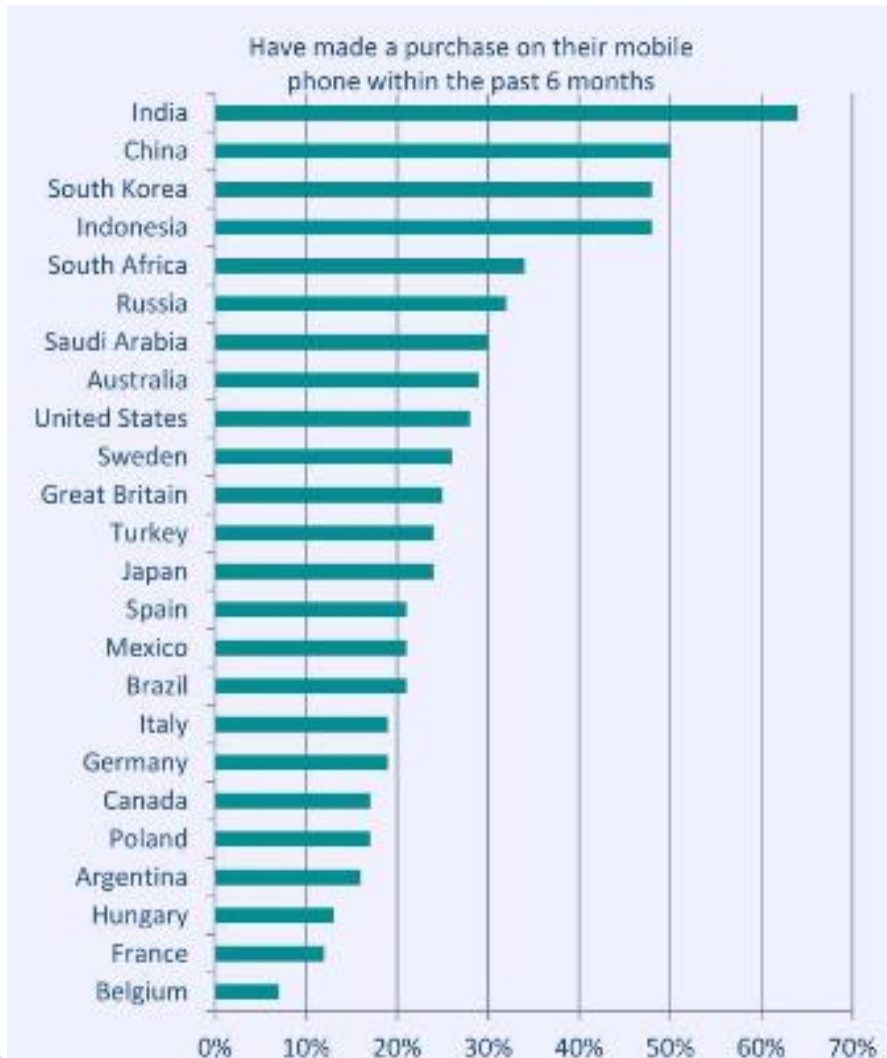
- A qualitative mobile research platform for Android & iPhone
 - Tasked based research
 - Two way interaction/probing/discussion based on guides
- Camera/Video response/capture
- GPS
- Online & Offline
- Reminders/notifications

Have you ever read an ad on your mobile phone ?



41% of people say they have read an ad on their mobile phone.

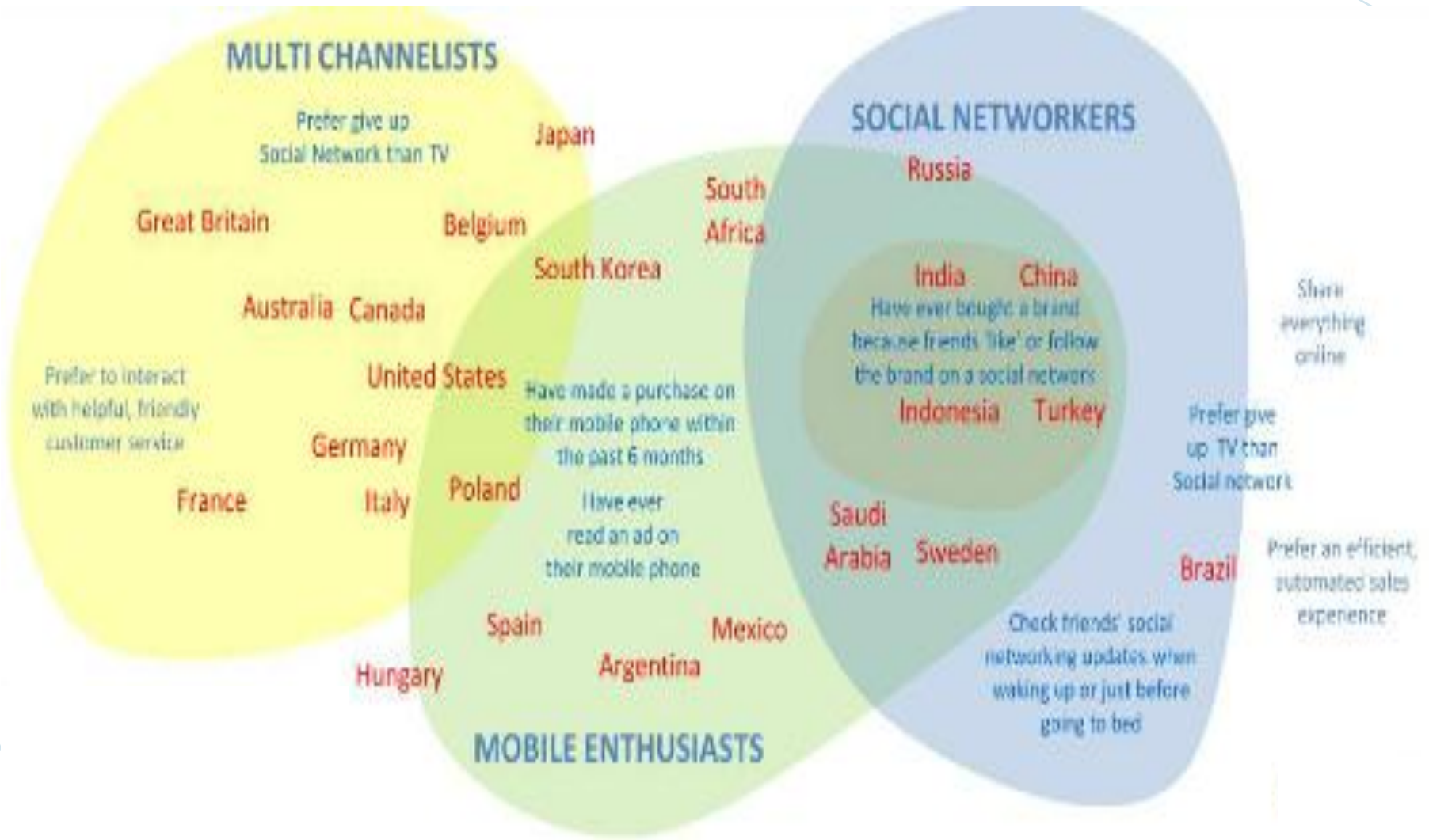
People from Latin America, Middle East, Africa and the BRIC countries are more likely to have viewed and ad on their mobile phone than people from North America, Japan and Western Europe.



42 % of people from APAC and BRIC countries have recently made a smart phone purchase.

The practice has not taken hold as strongly in Western Europe (18%).

Recapitulation



감사합니다 Natick
 Danke Ευχαριστίες Dalu
 Grazie Thank You Köszönöm
 Спасибо Dank Gracias
 谢谢 Merci Seé
 ありがとう

Obrigado