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TripBarometer 2016

Traveler Trends & Motivations
Global Findings

Executive Summary

TripBarometer 2016 provides a comprehensive global view of the complex modern travel ecosystem and unlocks fresh insights into how travelers research and book their holidays. It introduces a needs based approach to examining traveler's typologies and the motivations that drive travel behaviors.

✓ **Path to purchase journeys differ by demographic**	Most travelers start by deciding on their destination. Research and booking take place rapidly once travelers have committed to a trip, but female travelers tend to spend longer researching before booking.
✓ **Culture is the most important reason for selecting a destination**	However, motivations for choosing destinations differ markedly amongst different groups.
✓ **TripAdvisor is predominantly used for researching accommodation and destination**	Other sources of information tend to be used heavily by travelers to research either accommodation or destination
✓ **Needs based typologies demonstrate a diverse set of traveler characteristics**	Understanding travelers emotions and how they influence travel patterns reveals a diverse set of behaviors
✓ **Different types of trips lead to a different emphasis on booking behavior**	On shorter breaks, accommodation is more important and tends to be researched and booked first, but on longer trips, transport is prioritized

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Study background

- Interviews conducted in 33 countries
- Survey data was weighted to the known profile of the global online population. At country level, weighting was applied to represent the known online population and to represent the country's profile in terms of age, region and gender
- Fieldwork conducted between June 21 – July 8 2016

36,444 participants

Age Groups
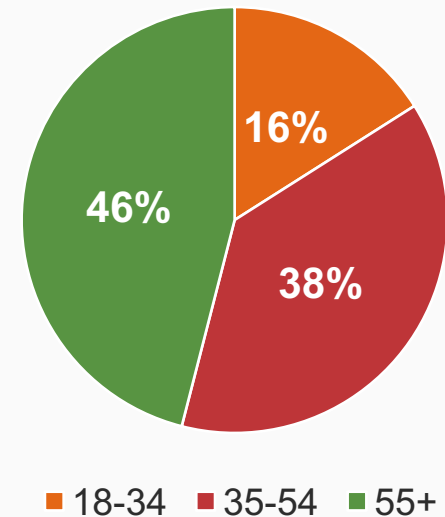
18-34

45% male
55% female

35-54

56% male
44% female

55+

69% male
31% female

16%

38%

46%

■ 18-34 ■ 35-54 ■ 55+

Base: All respondents (36,444); Age groups: 18-34 (7,173), 35-54 (16,540), 55+ (12,731)
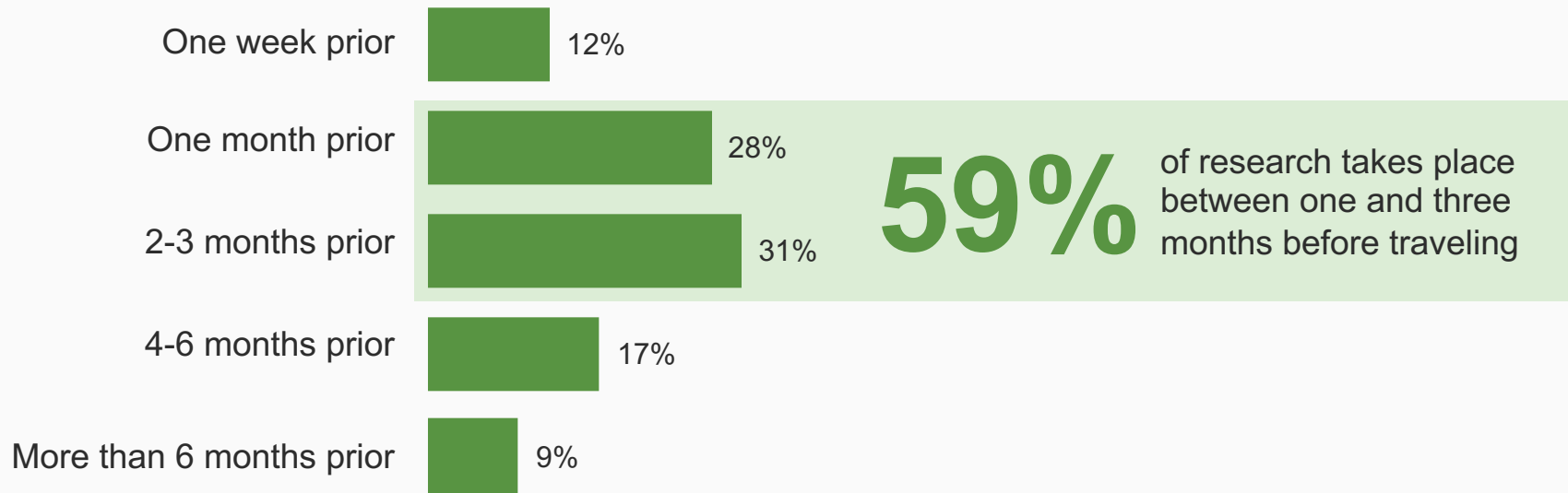
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PATH TO PURCHASE

Travelers research well in advance of travel, but the research to purchase journey is swift

However, the planning stage is relatively short. Almost half of travelers spend less than a week researching their trip before purchase

How far in advance did you begin researching your last trip?

Category	Percentage
One week prior	12%
One month prior	28%
2-3 months prior	31%
4-6 months prior	17%
More than 6 months prior	9%

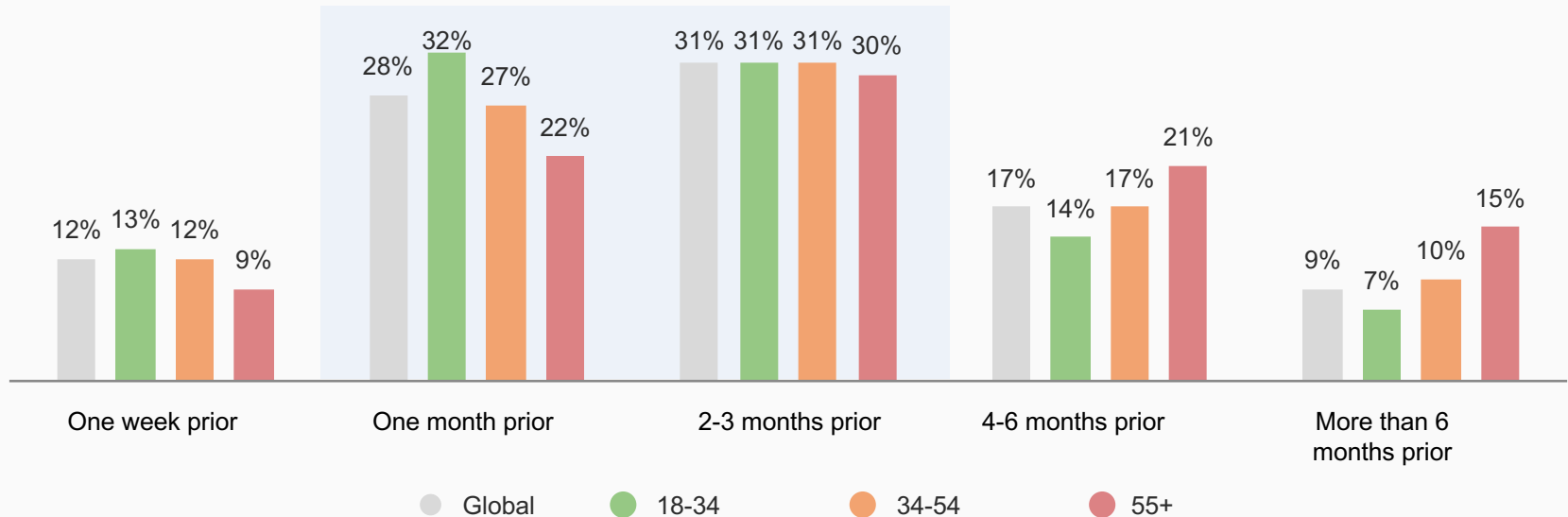**59%** of research takes place between one and three months before traveling

CQ7. For your most recent trip, when did you start researching your trip? CQ8. For your most recent trip, how long did you spend researching your trip from start to finish?
Base: All respondents (36,444)

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Younger travelers leave their research later than older generations

Whilst most travelers book between one and three months in advance of their trip, those in the 18-34 age group tend to do their booking later. Those over 55 years of age are more likely to book more than four months prior to their departure

How far in advance did you begin researching your last trip?

Most travelers begin researching their trip between one and three months before traveling

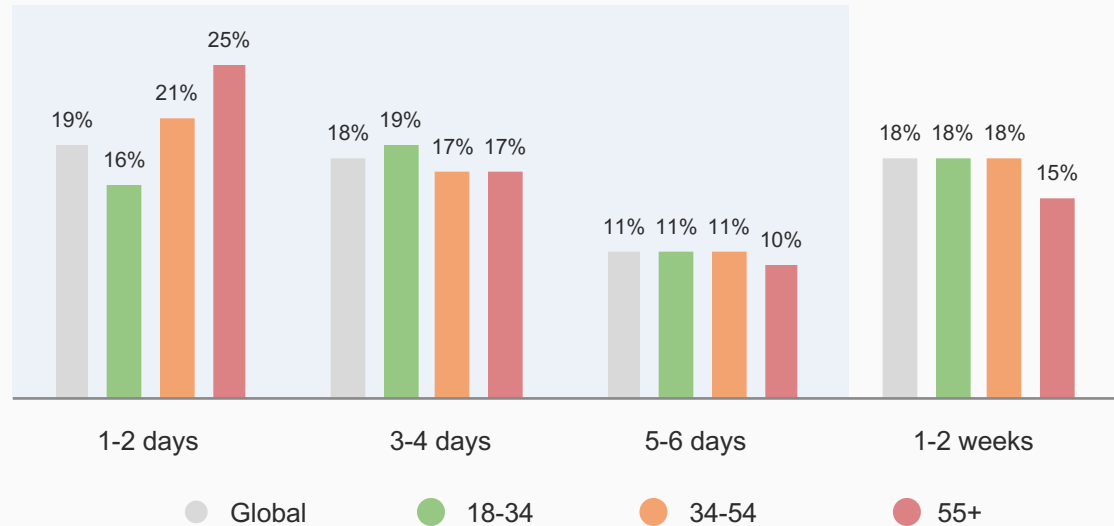|	One week prior	One month prior	2-3 months prior	4-6 months prior	More than 6 months prior
Global	12%	28%	31%	17%	9%
18-34	13%	32%	31%	14%	7%
34-54	12%	27%	31%	17%	10%
55+	9%	22%	30%	21%	15%

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Older travelers cram their research into a shorter period

o It is more common for travelers in the 55+ age group to cram their research into one or two days. One quarter of this age group books in this short time frame, compared to only 15% of 18-34 year olds

o Male travelers also research their trip more quickly. Almost one quarter (24%) spend one or two days researching, compared to 14% of female travelers, more of whom spend over one month researching

How long did you spend researching your last trip?

	Female	Male
1-2 days	14%	24%
3-4 days	17%	19%
1-2 weeks	18%	17%
1 month	10%	7%
2-3 months	10%	6%
4 months +	8%	4%

Around half of travelers spend less than a week researching

	Global	18-34	34-54	55+
1-2 days	19%	16%	21%	25%
3-4 days	18%	19%	17%	17%
5-6 days	11%	11%	11%	10%
1-2 weeks	18%	18%	18%	15%

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The length of the holiday also influences research behavior

Travelers begin researching longer trips further in advance, and spend more time researching these than they do for shorter trips

How far in advance did you begin researching your last trip?
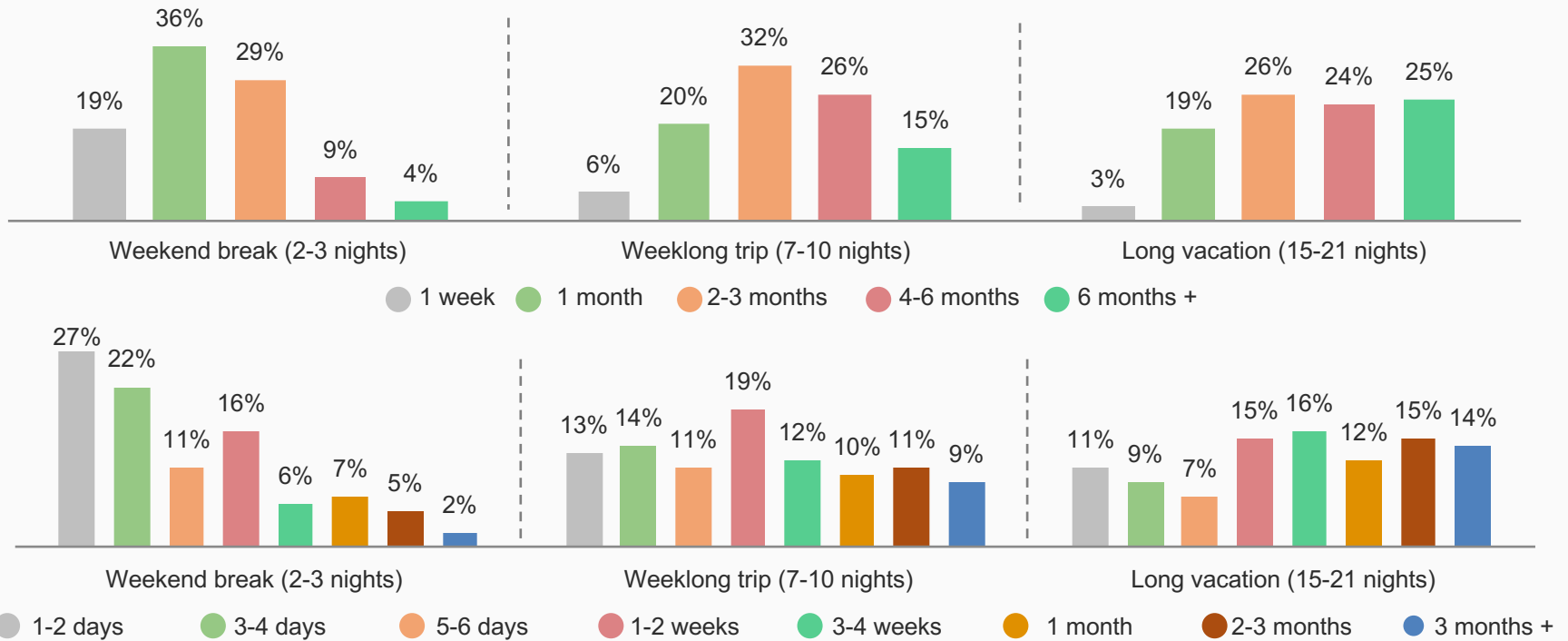
Top charts (legend: 1 week, 1 month, 2-3 months, 4-6 months, 6 months +)

Weekend break (2-3 nights): 19%, 36%, 29%, 9%, 4%

Weeklong trip (7-10 nights): 6%, 20%, 32%, 26%, 15%

Long vacation (15-21 nights): 3%, 19%, 26%, 24%, 25%

Legend: ● 1 week ● 1 month ● 2-3 months ● 4-6 months ● 6 months +

Bottom charts (legend: 1-2 days, 3-4 days, 5-6 days, 1-2 weeks, 3-4 weeks, 1 month, 2-3 months, 3 months +)

Weekend break (2-3 nights): 27%, 22%, 11%, 16%, 6%, 7%, 5%, 2%

Weeklong trip (7-10 nights): 13%, 14%, 11%, 19%, 12%, 10%, 11%, 9%

Long vacation (15-21 nights): 11%, 9%, 7%, 15%, 16%, 12%, 15%, 14%

Legend: ● 1-2 days ● 3-4 days ● 5-6 days ● 1-2 weeks ● 3-4 weeks ● 1 month ● 2-3 months ● 3 months +

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Most trips are destination-led

74% of travelers begin by researching and choosing their destination

How did you start planning for your trip?

Began comparing destinations	30%
Decided on a specific destination	45%
Researched flights or transportation	7%
Researched hotel or accommodation	5%
Booked flight or transportation	4%
Booked hotel or accommodation	3%
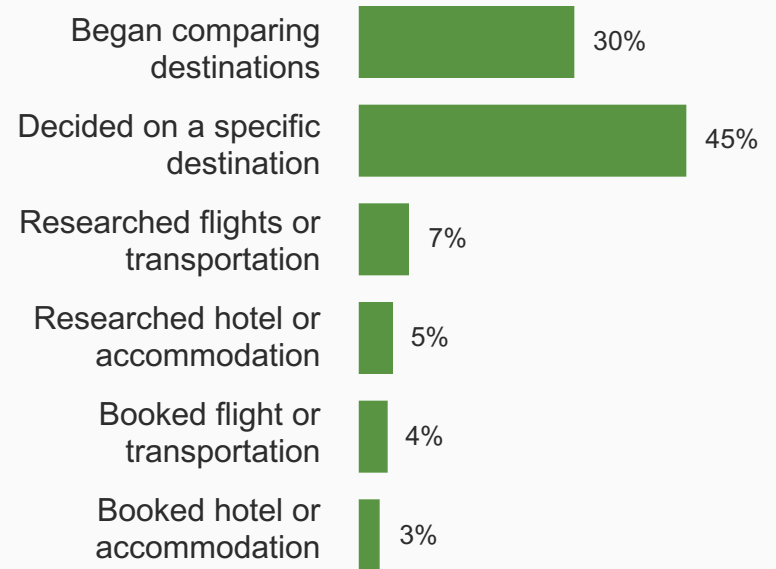
CQ6. In which order did you book each of the following items? Base: All respondents (36,444)

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Of those who don't start with destination…
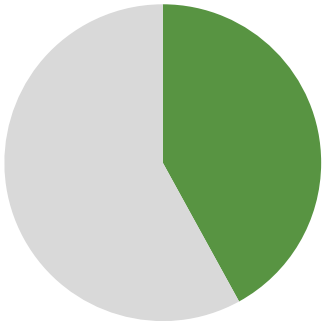
42%
Start by looking at
or booking flights
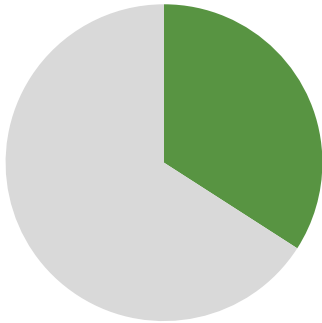
30%
Start by looking at or
booking accommodation

12%
Just travelled to
their destination

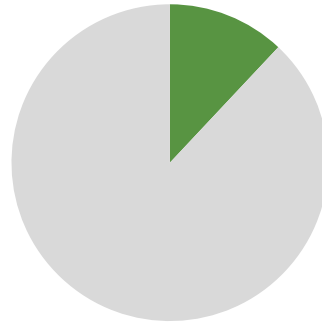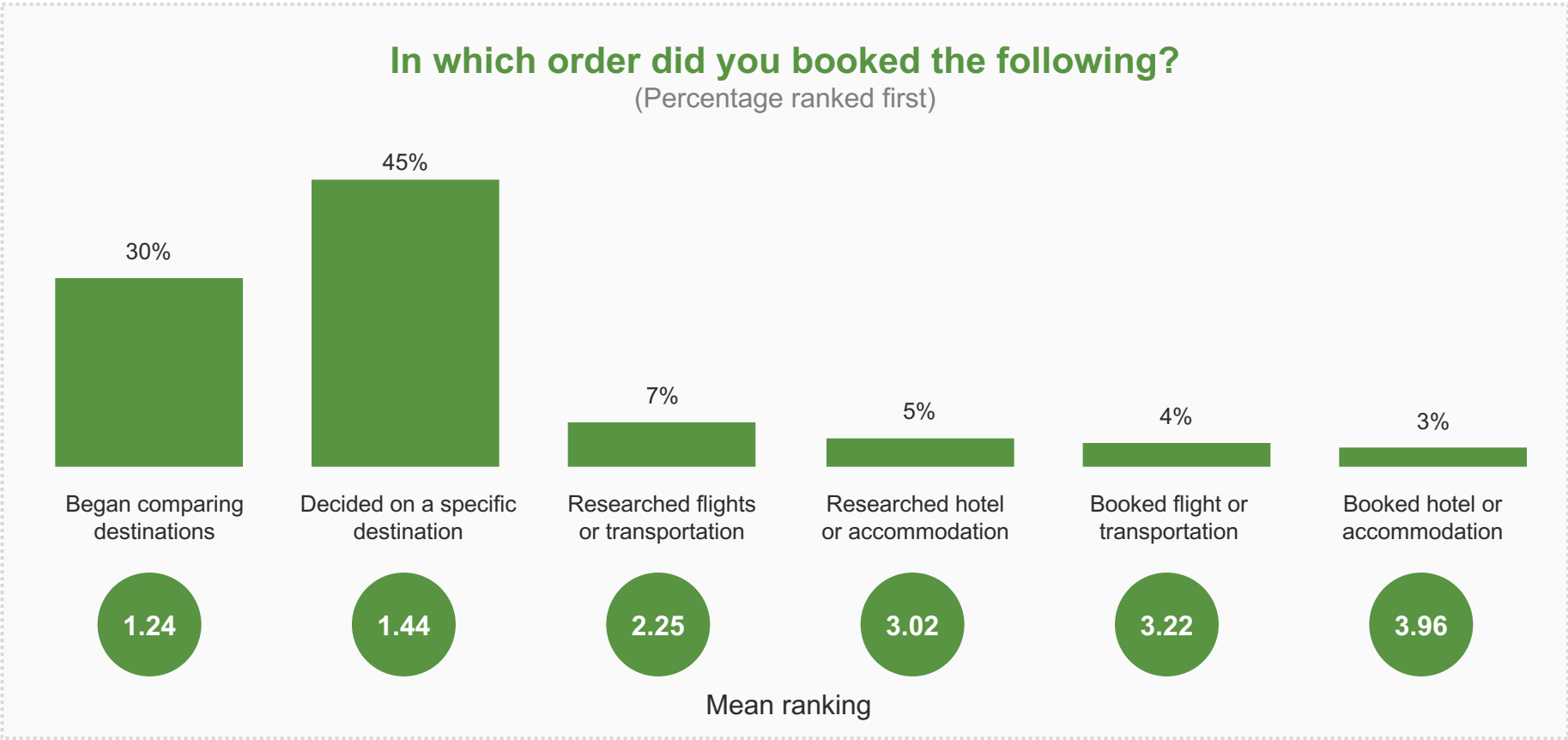CQ6. In which order did you book each of the following items? Base: Those who did not star with researching or deciding on destination (12,521)

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Destination is a popular starting point, but a sizeable number of travelers start their path to purchase journey elsewhere

Three in ten travelers start their booking pattern by comparing destinations, whilst almost half (45%) already have a destination in mind when they start booking

In which order did you booked the following?
(Percentage ranked first)

Began comparing destinations	Decided on a specific destination	Researched flights or transportation	Researched hotel or accommodation	Booked flight or transportation	Booked hotel or accommodation
30%	45%	7%	5%	4%	3%
1.24	1.44	2.25	3.02	3.22	3.96

Mean ranking

CQ6. In which order did you book each of the following items? Base: All participants(36,444)

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How do different demographics start their path to purchase journey?

o Younger travelers are more likely to begin by researching where they want to travel, but older travelers tend to enter their research and booking journey having decided on a destination

o There are substantial path to purchase differences between age groups:
there is little difference between income and gender

	Began comparing destinations	Decided on a specific destination	Researched flights or transportation	Booked flight or transportation	Researched hotel or accommodation	Booked hotel or accommodation
Overall	30%	45%	7%	4%	5%	3%
18-34	35%	41%	7%	3%	4%	3%
35-54	27%	49%	7%	4%	6%	3%
55+	19%	54%	7%	4%	4%	4%

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Travelers demonstrate four booking patterns

"Flight Bookers"

Booked their flights and then plan the rest

"Hotel Bookers"

Start by organising their accommodation

"Balanced Bookers"

Research flights and hotels before booking either

"Mavericks"

Skip the research phase and make bookings

Selecting destination

Flight Bookers path: Researching flights → Booking flights → Researching hotels → Booking hotels

Hotel Bookers path: Researching hotels → Booking hotels → Researching flights → Booking flights

Balanced Bookers path: Researching hotels → Researching flights → Booking hotels → Booking flights

Mavericks path: Booking hotels → Booking flights

CQ6. In which order did you book each of the following items? Please rank from first to last, with 'last' being the most recent part of the holiday that was decided.
Base: All participants (36,444)

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Introducing Flight Bookers

○ **Flight Bookers** are those who organize their destination and flights first. They book flights before researching about hotels

○ They are destination orientated, and four in ten choose a destination to experience the culture

○ This booking behavior is more common on longer holidays, where flights are likely to be more expensive than for short breaks
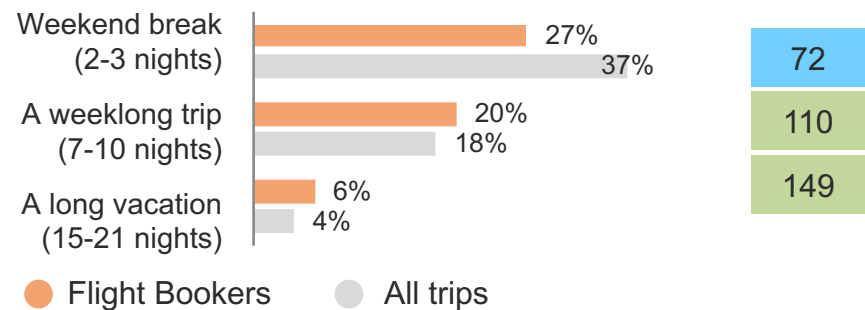
48%
of all trips

Top 5 reasons for choosing a destination

1. Experience the culture	41%	131
2. Flight had a good price	24%	170
3. For the weather	20%	104
4. Accommodation had good price	17%	76
5. Recommended by a friend	16	99

Flight-first booking behaviour is more prevalent for those taking longer trips

	Flight Bookers	All trips	
Weekend break (2-3 nights)	27%	37%	72
A weeklong trip (7-10 nights)	20%	18%	110
A long vacation (15-21 nights)	6%	4%	149

● Flight Bookers   ● All trips

Profile refers to three different trip lengths

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Introducing Hotel Bookers

o For **Hotel Bookers**, accommodation is researched and booked before anything else

o They choose their destination based on the price of the accommodation, and are more likely than other travelers to select a family friendly destination or to attend an event

o Accommodation is more important for those taking a weekend break: half of hotel bookers are going for a weekend away, compared to just over one third overall
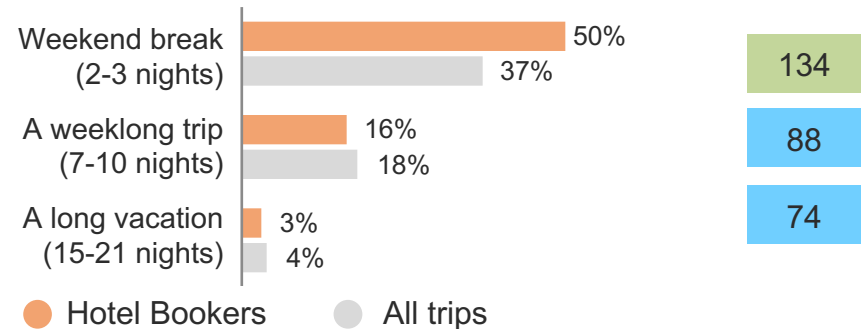
29% of all trips

Top 5 reasons for choosing a destination

1.	Accommodation had good price	32%	144
2.	To experience the culture	26%	83
3.	Family-friendly destination	21%	199
4.	For the weather	20%	90
5.	For an event	14%	139

For those taking shorter trips, their accommodation comes earlier in the path to purchase

	Hotel Bookers	All trips	
Weekend break (2-3 nights)	50%	37%	134
A weeklong trip (7-10 nights)	16%	18%	88
A long vacation (15-21 nights)	3%	4%	74

● Hotel Bookers ● All trips

Profile refers to three different trip lengths

CQ6. In which order did you book each of the following items? Please rank from first to last, with 'last' being the most recent part of the holiday that was decided. CQ9. What were the main reasons for choosing where you went on your last trip? CQ4. How many night, in total, did you spend away from your home during your most recent trip?
Base: All participants (36,444); Hotel bookers (6,454)

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Introducing Balanced Bookers

o Culture is the most important to choose a destination for **Balanced Bookers**, closely followed by price

o Their extensive research is both focused on destination and getting a good price

o Balanced bookers go on similar length trips to other travelers, indicating it is not the length of trip that drives booking behavior, but a characteristic of this group of travelers
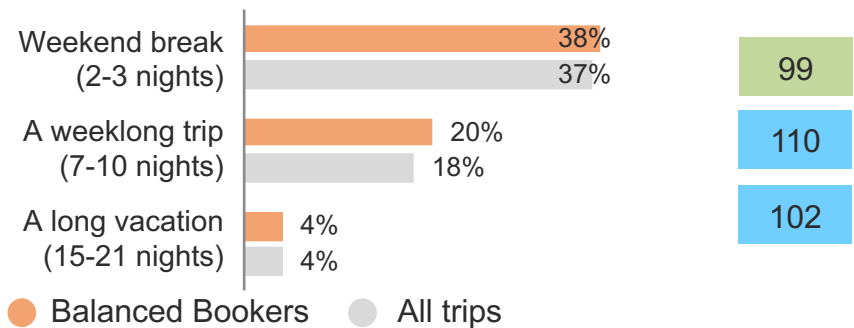
10%
of all trips

Top 5 reasons for choosing a destination

1.	Experience the culture	42%	134
2.	Accommodation had good price	29%	131
3.	Flight had a good price	25%	155
4.	Recommended by a friend	23%	143
5.	For the weather	21%	104

Balanced Bookers are spread amongst different trip lengths

	Balanced Bookers	All trips	
Weekend break (2-3 nights)	38%	37%	99
A weeklong trip (7-10 nights)	20%	18%	110
A long vacation (15-21 nights)	4%	4%	102

● Balanced Bookers ○ All trips

Profile refers to three different trip lengths

CQ6. In which order did you book each of the following items? Please rank from first to last, with 'last' being the most recent part of the holiday that was decided. CQ9. What were the main reasons for choosing where you went on your last trip? CQ4. How many night, in total, did you spend away from your home during your most recent trip? Base: All participants (36,444); Balanced bookers (1,429)

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Introducing Mavericks

- **M**avericks book quickly with limited time spent researching
- Compared to other travelers, mavericks are more likely to be creatures of habit: 17% choose their destination because they go there every year, compared to 10% overall
- Business travelers and long term holiday makers are also more prevalent amongst those booking without completing large amounts of research

13%
of all trips

Top 5 reasons for choosing a destination

1.	Go there every year	17%	169
2.	Experience the culture	16%	51
3.	Accommodation had good price	16%	72
4.	The flight had good price	16%	99
5.	For the weather	13%	64

52% of all Mavericks are business travelers — 157

Almost **double** the number of Mavericks are on vacation for more than 21 days compared to other travelers (7% compared to 4%) — 174

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Culture, cost and climate are key draws when choosing a destination

31% of travelers select a destination for its culture
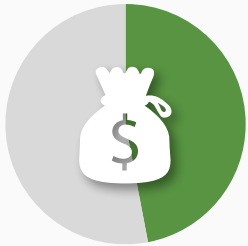
Almost half (47%) of travelers choose a destination because of price

One in five travelers state that weather was an important factor in choosing their destination

Top ten reasons for choosing a destination
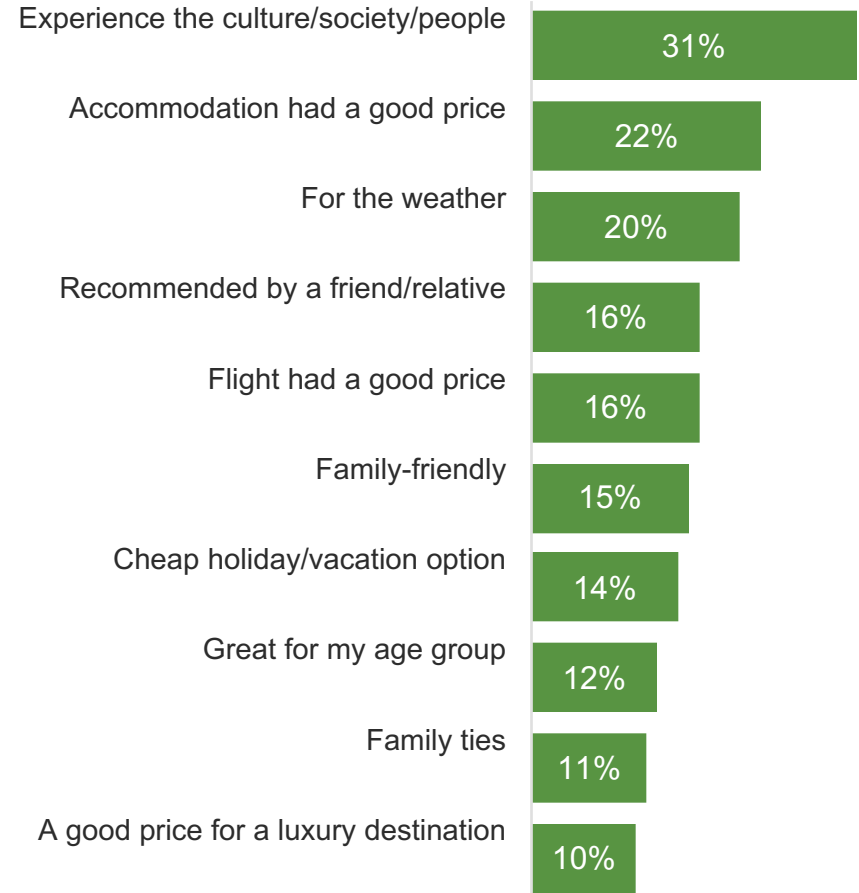
Reason	%
Experience the culture/society/people	31%
Accommodation had a good price	22%
For the weather	20%
Recommended by a friend/relative	16%
Flight had a good price	16%
Family-friendly	15%
Cheap holiday/vacation option	14%
Great for my age group	12%
Family ties	11%
A good price for a luxury destination	10%

CQ9. What were the main reasons for choosing where you went on your last trip? Base: All respondents (36,444)

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Recommendations are more important amongst younger travelers, whilst older generations are more habitual

o Travelers in the 18-34 age group are more likely to choose a destination based on recommendations and value. They are also more likely to choose a destination because it is better for their age group

o Travelers aged 55+ are more habitual: 14% choose a destination because they go there every year, compared to 7% of 18-34 year olds

Reasons for choosing a destination

Recommended by friend/relative: Global 16%, 18-34 22%, 34-54 11%, 55+ 8%
It was a cheap holiday/vacation option: Global 14%, 18-34 19%, 34-54 12%, 55+ 7%
Great for my age group: Global 12%, 18-34 16%, 34-54 7%, 55+ 10%
Go there every year: Global 10%, 18-34 7%, 34-54 11%, 55+ 14%

Legend: ● Global ● 18-34 ● 34-54 ● 55+

Families have different preferences

o Only one quarter (26%) visit a destination because of the culture or society

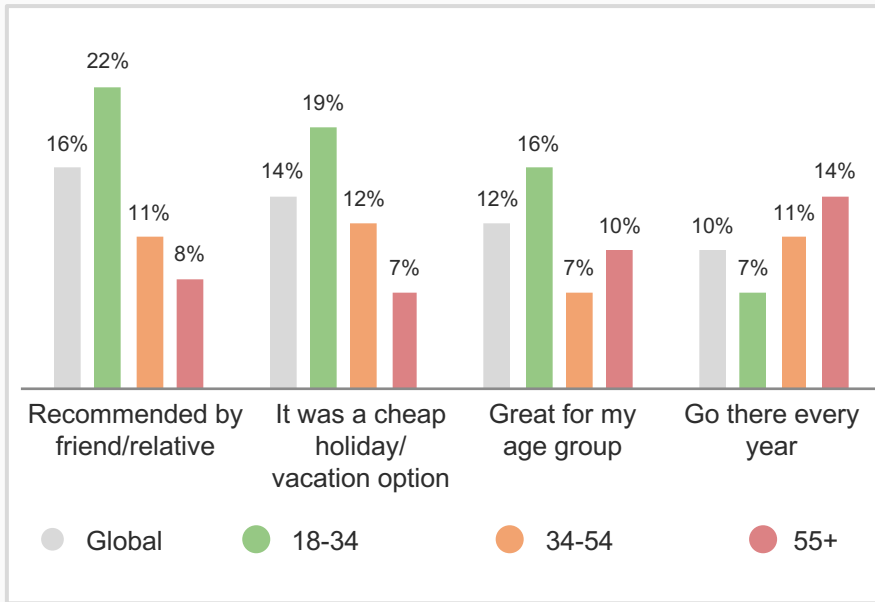o 37% choose a destination because it was family friendly, compared with 15% overall

CQ9. What were the main reasons for choosing where you went on your last trip?
Base: All respondents (36,444); Age Groups: 18-34 (7,173), 35-54 (16,540), 55+ (12,731); participants with families (6,585)

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TripAdvisor is more influential than other sources when choosing destination and particularly accommodation

73% of travelers use online sources when deciding on their destination

86% of travelers use online sources when deciding on their accommodation

62% of travelers look offline when deciding on their destination

50% of travelers look offline when deciding on their accommodation

Active research

Source	Destination	Accommodation
TripAdvisor	44%	55%
Travel guide websites	26%	21%
Other travel review sites	17%	45%
Travel guide books	32%	17%
Media	22%	11%

Social channels

Source	Destination	Accommodation
Content posted by travelers	35%	39%
Content posted by friends/family	22%	12%
Content posted by businesses	13%	16%
Word of mouth	38%	26%

Interaction w/ tour/travel companies

Source	Destination	Accommodation
Online travel agent/tour operator websites	20%	13%
Other online travel providers	13%	13%
Online advertisements	12%	12%
Official hotel ratings score	12%	39%
Private accommodation/house swap listing sites	6%	21%
Offline advertisements	15%	9%
Travel operators	13%	16%
Travel agents/tour operators	12%	13%

Legend:
Destination
Accommodation

CQ12. Which of the following sources of information, if any, did you use to plan your most recent trip? Base: All respondents (36,444)

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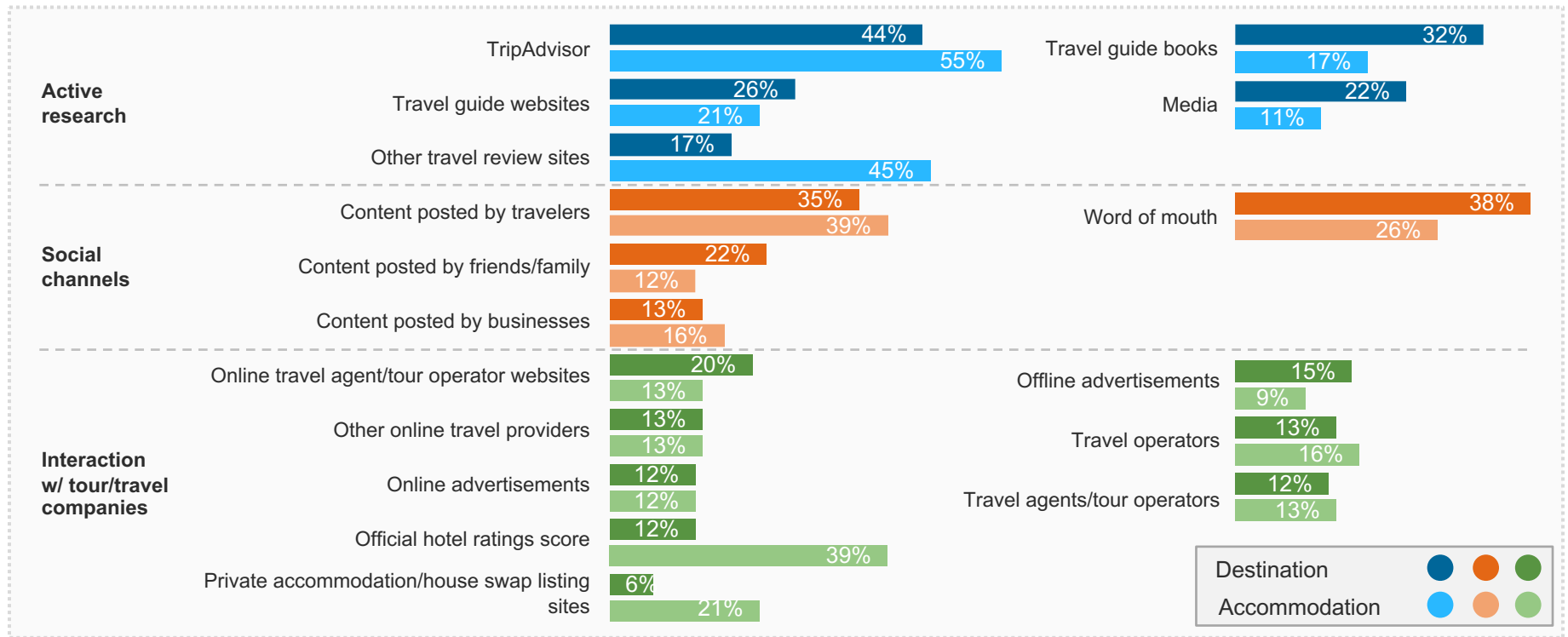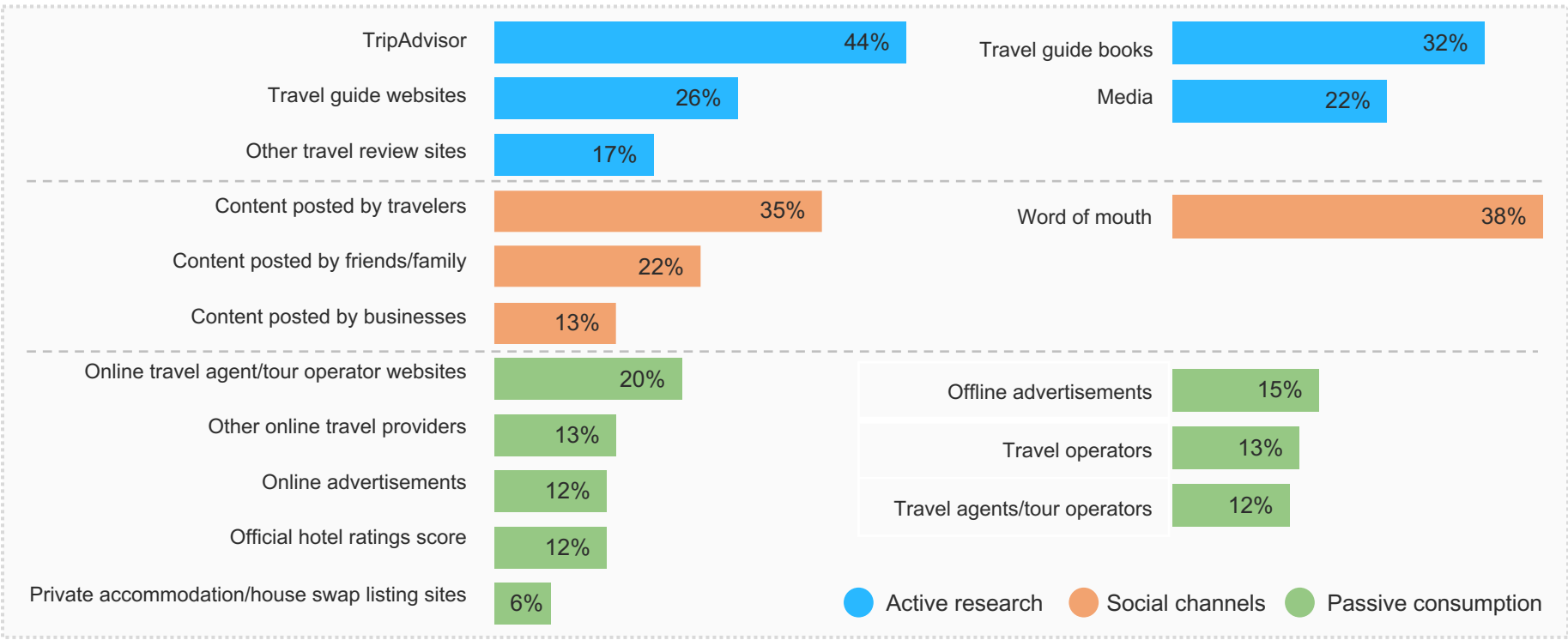# A mix of online and offline channels are used when travelers select their destination

73% of travelers use online sources when deciding on their destination

62% of travelers look offline when deciding on their destination

Source	Percentage
TripAdvisor	44%
Travel guide websites	26%
Other travel review sites	17%
Content posted by travelers	35%
Content posted by friends/family	22%
Content posted by businesses	13%
Online travel agent/tour operator websites	20%
Other online travel providers	13%
Online advertisements	12%
Official hotel ratings score	12%
Private accommodation/house swap listing sites	6%

Source	Percentage
Travel guide books	32%
Media	22%
Word of mouth	38%
Offline advertisements	15%
Travel operators	13%
Travel agents/tour operators	12%

● Active research   ● Social channels   ● Passive consumption

CQ12. Which of the following sources of information, if any, did you use to plan your most recent trip? Base: All respondents (36,444)

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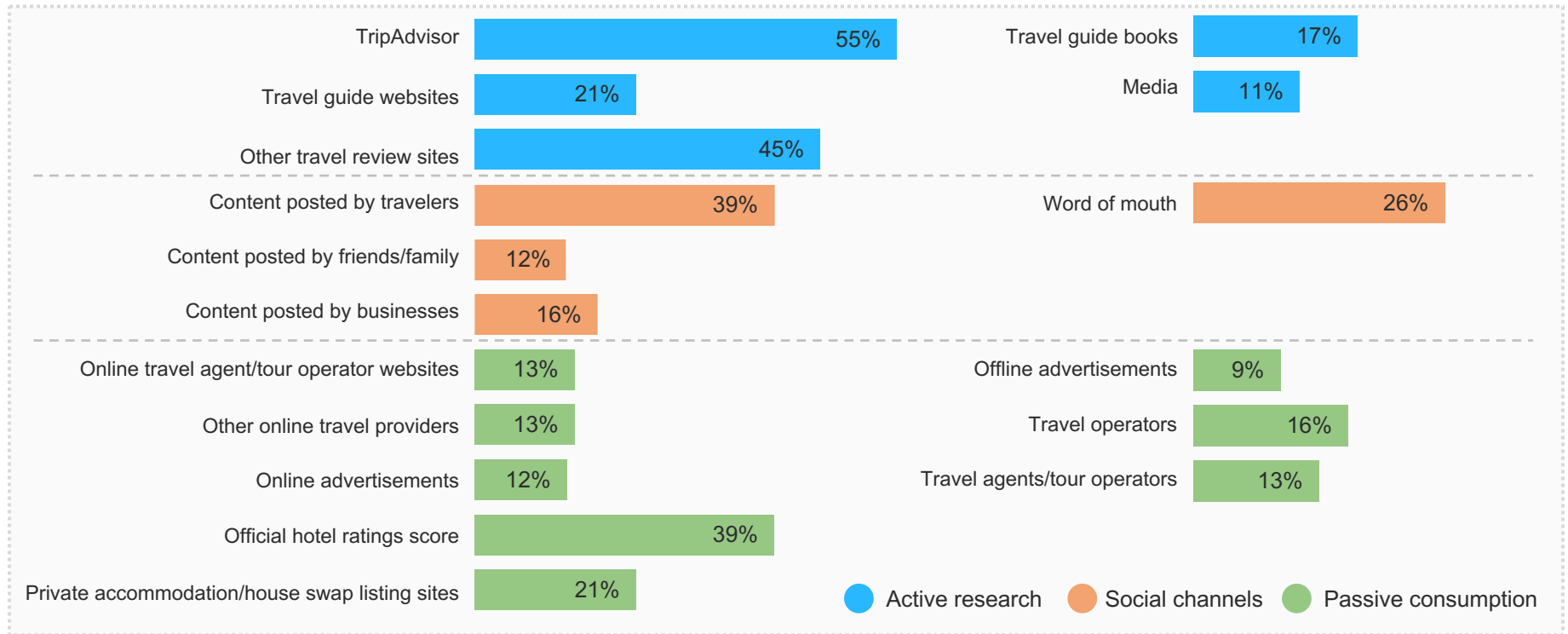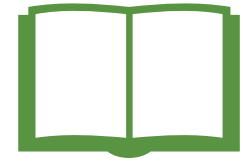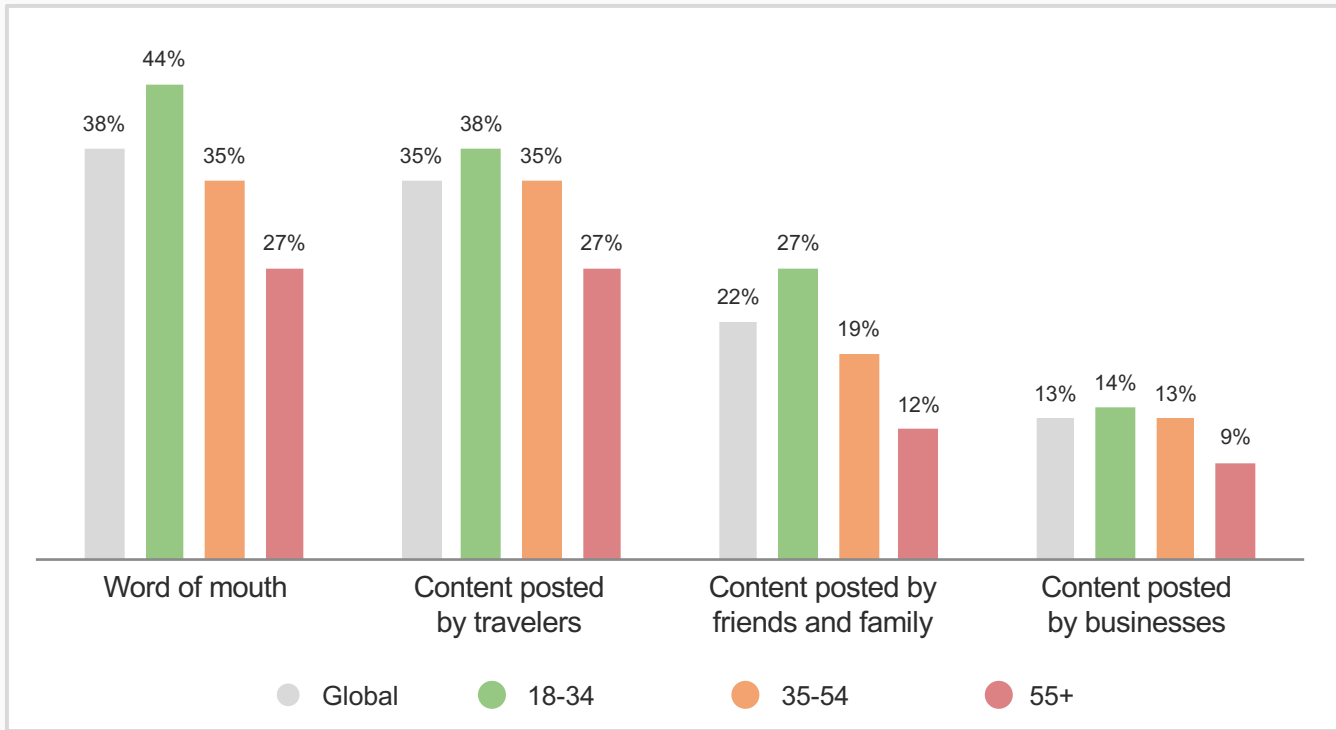
Online dominates when selecting accommodation

86% of travelers use online sources when deciding on their accommodation

50% of travelers look offline when deciding on their accommodation

Source	%
TripAdvisor	55%
Travel guide websites	21%
Other travel review sites	45%
Content posted by travelers	39%
Content posted by friends/family	12%
Content posted by businesses	16%
Online travel agent/tour operator websites	13%
Other online travel providers	13%
Online advertisements	12%
Official hotel ratings score	39%
Private accommodation/house swap listing sites	21%
Travel guide books	17%
Media	11%
Word of mouth	26%
Offline advertisements	9%
Travel operators	16%
Travel agents/tour operators	13%

● Active research ● Social channels ● Passive consumption

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Younger generations use more social channels to select their destination

○ Both face-to-face and digital word of mouth are particularly influential for younger travelers

○ Fewer 18-24s use guide books

What sources of information did you use when deciding on the destination of your trip?
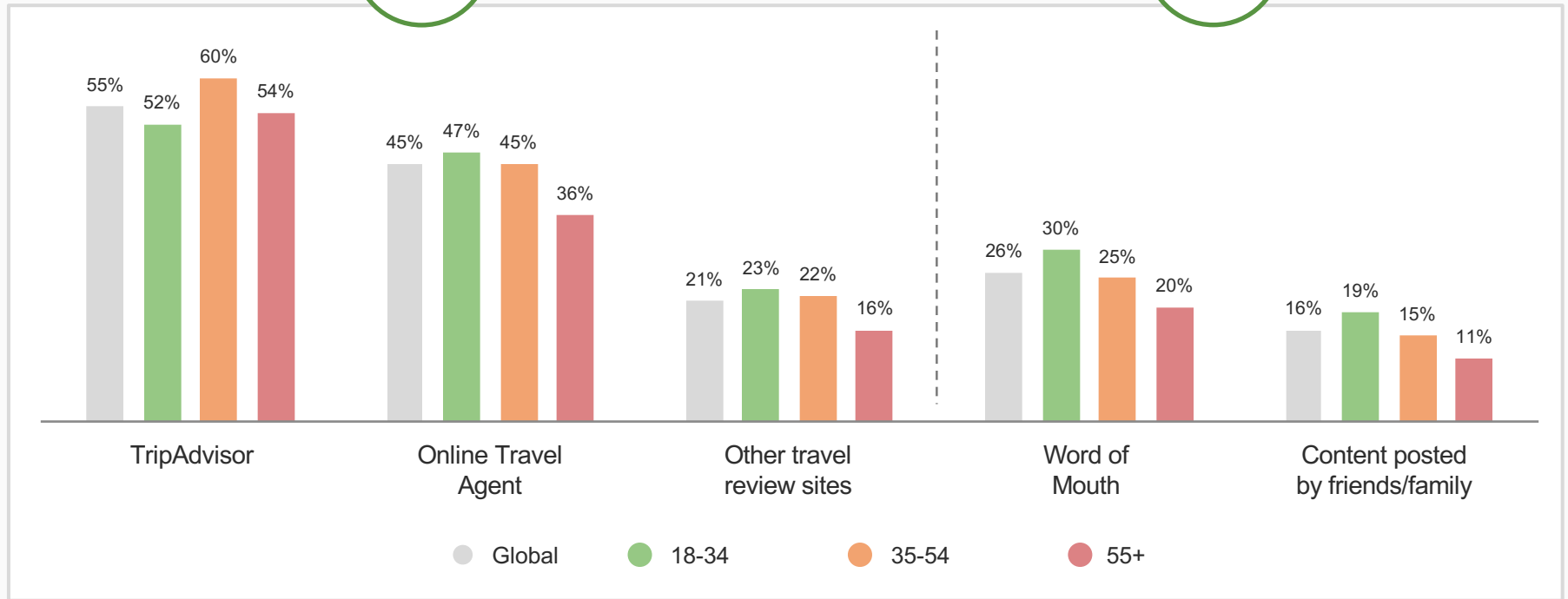

Word of mouth
- Global: 38%
- 18-34: 44%
- 35-54: 35%
- 55+: 27%

Content posted by travelers
- Global: 35%
- 18-34: 38%
- 35-54: 35%
- 55+: 27%

Content posted by friends and family
- Global: 22%
- 18-34: 27%
- 35-54: 19%
- 55+: 12%

Content posted by businesses
- Global: 13%
- 18-34: 14%
- 35-54: 13%
- 55+: 9%

Legend: ● Global ● 18-34 ● 35-54 ● 55+

Use of guidebooks

Age	%
18-24	28%
25-34	33%
35-49	32%
50-64	34%
65+	36%

CQ12. Which of the following sources of information, if any, did you use to plan your most recent trip?
Base: All respondents (36,444); Age Groups: 18-34 (7,173), 35-54 (16,540), 55+ (12,731)

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Online dominates when selecting accommodation

Younger travelers use a wider array of channels when choosing accommodation, whereas older travelers use other travel websites less and have a greater reliance on TripAdvisor

|	Global	18-34	35-54	55+
TripAdvisor	55%	52%	60%	54%
Online Travel Agent	45%	47%	45%	36%
Other travel review sites	21%	23%	22%	16%
Word of Mouth	26%	30%	25%	20%
Content posted by friends/family	16%	19%	15%	11%

CQ12. Which of the following sources of information, if any, did you use to plan your most recent trip?
Base: All respondents (36,444); Age Groups: 18-34 (7,173), 35-54 (16,540), 55+ (12,731)

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Private accommodation and house swap listings

o Globally, 5% of travelers used a private accommodation/house swap listing during their last trip, rising to 7% of the 18-34 age group

o Whilst many users use this channel to get a better price, it is most used by high income travelers

o Nearly one in three book this type of accommodation because they had a positive previous experience

Percentage of those who used a private accommodation/house swap listing (e.g. Airbnb, FlipKey, Homeaway) on their last trip

Overall	5%	
Age		
18-34	7%	
35-54	4%	
55+	4%	
Income		
Low	4%	
Medium	4%	
High	6%	
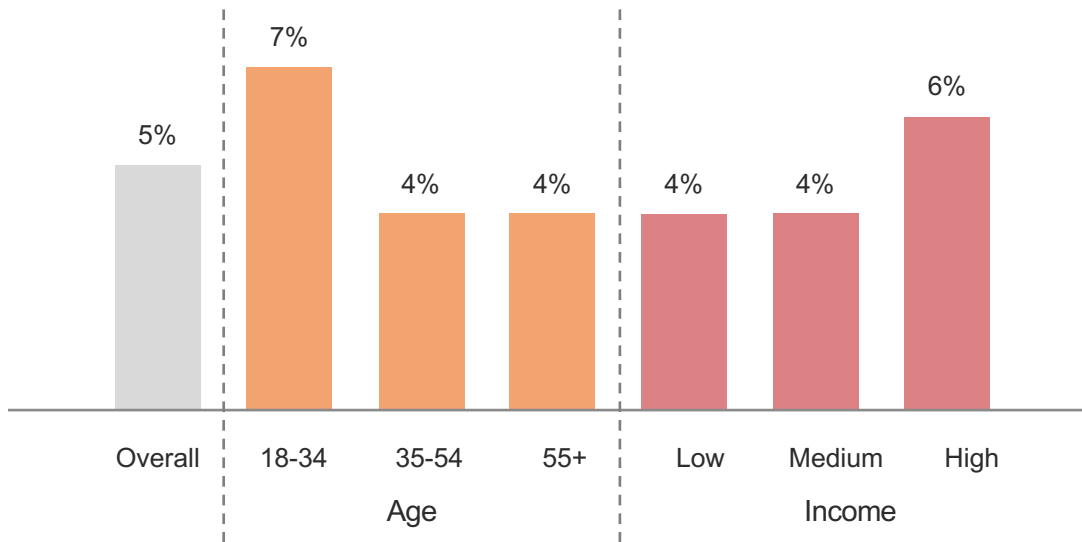
Why did you book this way?

45%
To get a better price

29%
Had a positive previous experience

16%
Usually book this way

CQ18 Which of the following best describes your accommodation type? CQ15. Which, if any, of the following did you use to book the accommodation for your most recent trip? CQ16. What was the main reason you booked this way? Base: All participants (36,444); Age Groups: 18-34 (7,173), 35-54 (16,540), 55+ (12,731); Income: Low (4,304), Medium (7,235), High (9,757); travelers who use a private accommodation/house swap listing (e.g.. Airbnb, Flipkey, Homeaway) to book their accommodation on their last trip (1,655).

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Younger, low-income groups use trains more often than older, wealthier groups

- Globally, one in five travelers used a train on their last trip, rising to one quarter of 18-34 year olds
- Train booking is made most frequently through the travel provider's website and at the terminus
- Older and wealthier travelers are more likely to book through the travel provider's website compared to younger travelers

Which travel arrangements did you make on your last trip? Train users by demographic groups

Overall	18-34	35-54	55+	Low	Med	High
21%	26%	17%	17%	28%	19%	19%
	Age			Income		
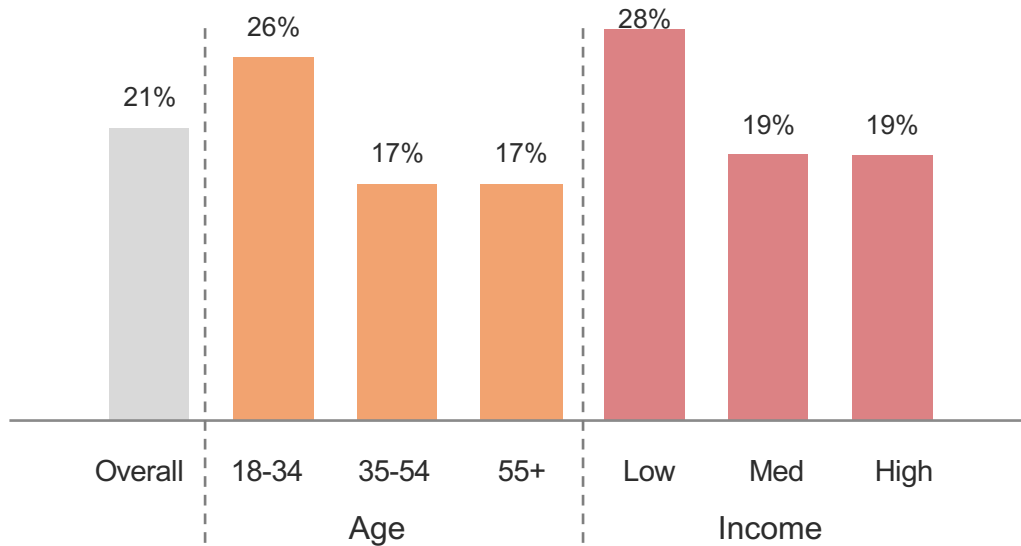
Where did you book your train?

		Travel Provider's website	Booked at terminus
Overall		28%	26%
Age	18-34	24%	27%
	35-54	31%	27%
	55+	36%	22%
Income	Low	23%	29%
	Med	31%	24%
	High	34%	24%

CQ20. Which travel arrangements did you make on your last trip? CQ21b. During your most recent trip, which of the following methods did you use to book your train? Base: All participants (36,444); Age Groups: 18-34 (7,173), 35-54 (16,540), 55+ (12,731); Income: Low (4,304), Medium (7,235), High (9,757); Participants who traveled by train (5,711); Age groups: 18-34 (1,583), 35-54 (2,393), 55+ (1,735).

Older travelers more likely to share reviews on TripAdvisor

o Older travelers are most likely to share their experiences on TripAdvisor
  – over half say they share reviews or pictures

o Younger travelers use a mix of Facebook and Instagram

	Overall	Index scores for age groups		
		18-34	35-54	55+
Shared a review on TripAdvisor	44%	88	108	117
Shared pictures on Facebook	43%	118	92	64
Posted a status about my holiday on Facebook	29%	120	92	54
Checked in at locations on Facebook	24%	124	91	45
Shared pictures on Instagram	24%	162	57	20
Shared pictures on TripAdvisor	22%	99	104	85
Shared videos on Facebook	11%	126	99	54
Shared a review on accommodation website	11%	99	90	99
Shared a review on Booking.com	10%	99	109	89
Tweeted pictures on Twitter	8%	149	62	37
Shared on another review website	6%	99	116	82

● 10% higher than overall score   ● 10% lower than overall score

CQ26 Did you share any information about your most recent trip in any of the following ways? Base: All respondents (36,444)

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Over half of female travelers share on Facebook

o Facebook is the most used social networking site among TripAdvisor travelers and three in five younger travelers share their experiences on this platform

o While male travelers are more likely to share on TripAdvisor, female travelers opt for Facebook and Instagram

		46%	facebook 50%	Instagram 24%	9%
18-34	Male	42%	55%	30%	14%
	Female	40%	62%	46%	10%
35-54	Male	52%	45%	13%	5%
	Female	47%	51%	16%	4%
55+	Male	55%	31%	4%	3%
	Female	50%	38%	5%	2%

CQ26 Did you share any information about your most recent trip in any of the following ways? Base: All respondents (36,444)

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Asian markets and Brazil lead the way in accessing TripAdvisor and OTAs via mobile

| TripAdvisor | | | OTA | |
Laptop	Smartphone		Laptop	Smartphone
83%	41%	**Total**	77%	31%
92%	**29%**	Canada	**87%**	**13%**
90%	**31%**	Australia	**85%**	**22%**
90%	**28%**	France	**85%**	**16%**
89%	38%	United States	**84%**	**19%**
87%	**51%**	Brazil	**84%**	34%
86%	**30%**	India	69%	27%
86%	41%	Spain	**82%**	27%
86%	**32%**	United Kingdom	**82%**	**22%**
85%	**32%**	Germany	**85%**	**21%**
85%	43%	Italy	**82%**	29%
84%	**48%**	Japan	76%	33%
83%	38%	Mexico	79%	**23%**
79%	**33%**	Singapore	79%	27%
70%	43%	China	**64%**	**47%**
69%	50%	Malaysia	**65%**	**39%**
62%	46%	Indonesia	**59%**	**43%**
52%	36%	United Arab Emirates	**50%**	**37%**
46%	48%	Thailand	**50%**	**43%**

CQ13 You said these online sources of information had an influence on you when you gathered ideas and inspiration for your trip. Did you look at this type of information from your mobile app, mobile/smartphone, tablet or laptop/PC? Base: Respondents using online research on TripAdvisor (30,149), OTA (20,466)

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Mobile app usage in China and Spain is high

TripAdvisor			OTA	
Mobile App	**Tablet**		**Mobile App**	**Tablet**
33%	23%	**Total**	19%	19%
41%	22%	China	**34%**	18%
40%	26%	Spain	19%	20%
37%	23%	Italy	20%	18%
36%	**32%**	United Kingdom	**13%**	19%
35%	21%	Indonesia	21%	**27%**
35%	19%	Mexico	15%	**14%**
34%	**12%**	India	**24%**	**11%**
33%	**28%**	Germany	15%	22%
33%	26%	United States	**13%**	**25%**
32%	**17%**	Brazil	17%	**14%**
31%	**17%**	Malaysia	19%	20%
30%	**29%**	Australia	**13%**	17%
29%	23%	France	**11%**	18%
29%	20%	United Arab Emirates	16%	**24%**
27%	20%	Thailand	**12%**	**24%**
26%	24%	Singapore	20%	**25%**
24%	**32%**	Canada	**8%**	23%
23%	21%	Japan	16%	16%

CQ13 You said these online sources of information had an influence on you when you gathered ideas and inspiration for your trip. Did you look at this type of information from your mobile app, mobile/smartphone, tablet or laptop/PC? Base: Respondents using online research on TripAdvisor (30,149), OTA (20,466)

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HOLIDAY TYPES

Beach holidays and exploring a city's culture are global favorites, while half of TripAdvisor users also take city breaks and visit family and friends

What types of holidays have you done?

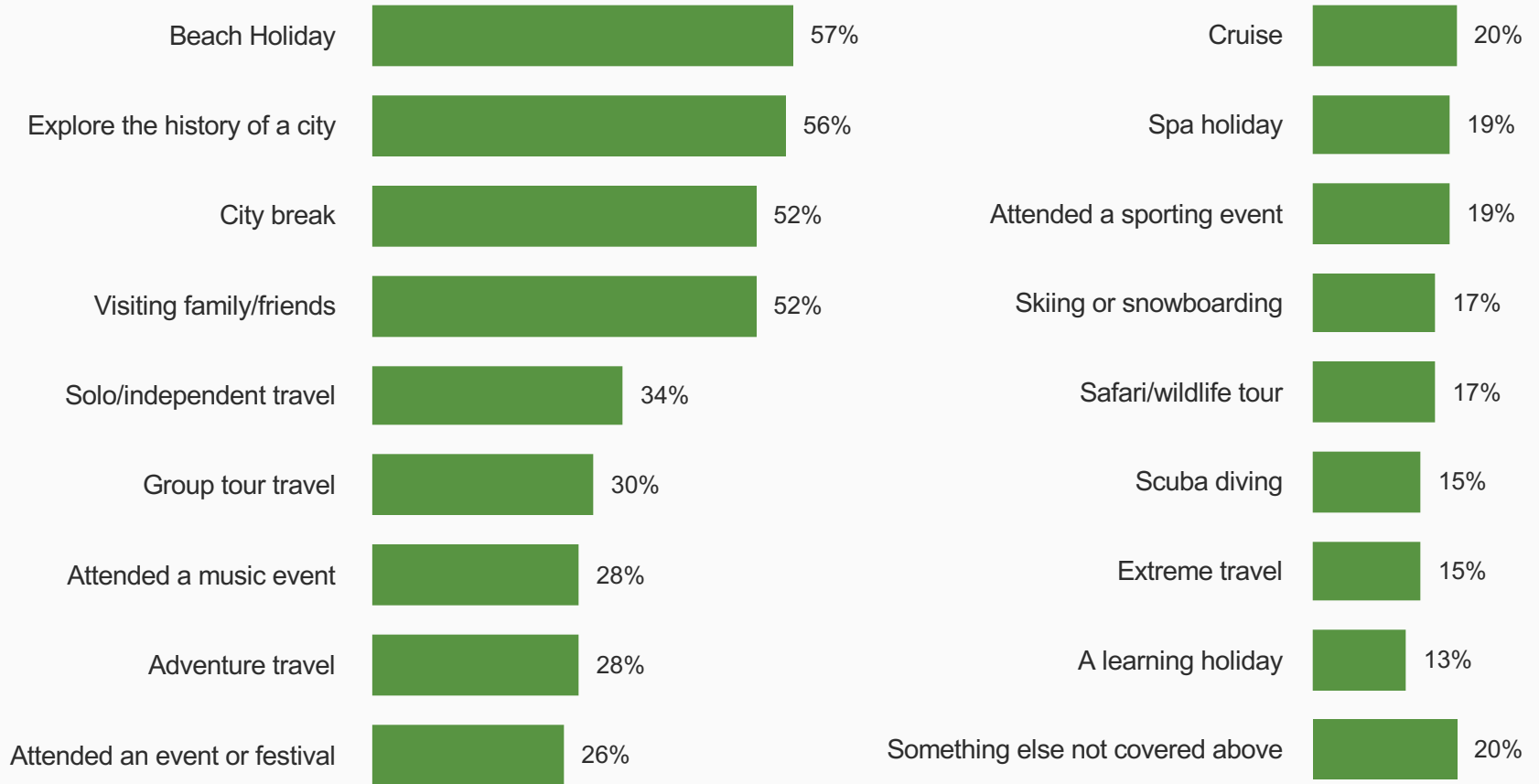| Beach holiday	Exploring city history	City break	Visiting family/ friends
57%	**56**%	**52**%	**52**%

CQ28a. Which of the following have you ever done when on holiday/vacation? Base: All respondents (36,444)

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Beach holidays and exploring a city's culture are global favorites, while half of TripAdvisor users also take city breaks and visit family and friends

What types of holidays have you done?

Holiday type	%		Holiday type	%
Beach Holiday	57%		Cruise	20%
Explore the history of a city	56%		Spa holiday	19%
City break	52%		Attended a sporting event	19%
Visiting family/friends	52%		Skiing or snowboarding	17%
Solo/independent travel	34%		Safari/wildlife tour	17%
Group tour travel	30%		Scuba diving	15%
Attended a music event	28%		Extreme travel	15%
Adventure travel	28%		A learning holiday	13%
Attended an event or festival	26%		Something else not covered above	20%

CQ28a. Which of the following have you ever done when on holiday/vacation? Base: All respondents (36,444)

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Beach holidays more popular with women and high-income, while city breaks less popular with 55+

What types of trips have you done?

		Beach holiday	Exploring city history	City break	Visiting family/friends
Overall		**57%**	**56%**	**52%**	**52%**
Age	18-34	101	97	101	101
	35-54	103	101	103	97
	55+	88	103	86	99
Income	Low	81	94	99	89
	Medium	99	92	97	95
	High	110	104	97	109
Gender	Male	92	97	97	91
	Female	110	101	101	107

● 10% higher than overall score   ● 10% lower than overall score

CQ28a. Which of the following have you ever done when on holiday/vacation? Base: All respondents (36,444); Age groups: 18-34 (9,757), 35-54 (16,540), 55+ (12,731); Income: Low (4,303), Medium (7,235), High (9,757); Gender: Male (17,084), Female (19,236)

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Older travelers more likely to cruise but less likely to adopt other activities

o Adventure and extreme travel are more popular amongst 18-34 year old travelers, whilst cruises are preferred by older travelers. Three in ten travelers over 55 have been on a cruise

o Learning holidays are most popular amongst younger age groups

What types of holidays have you ever done?
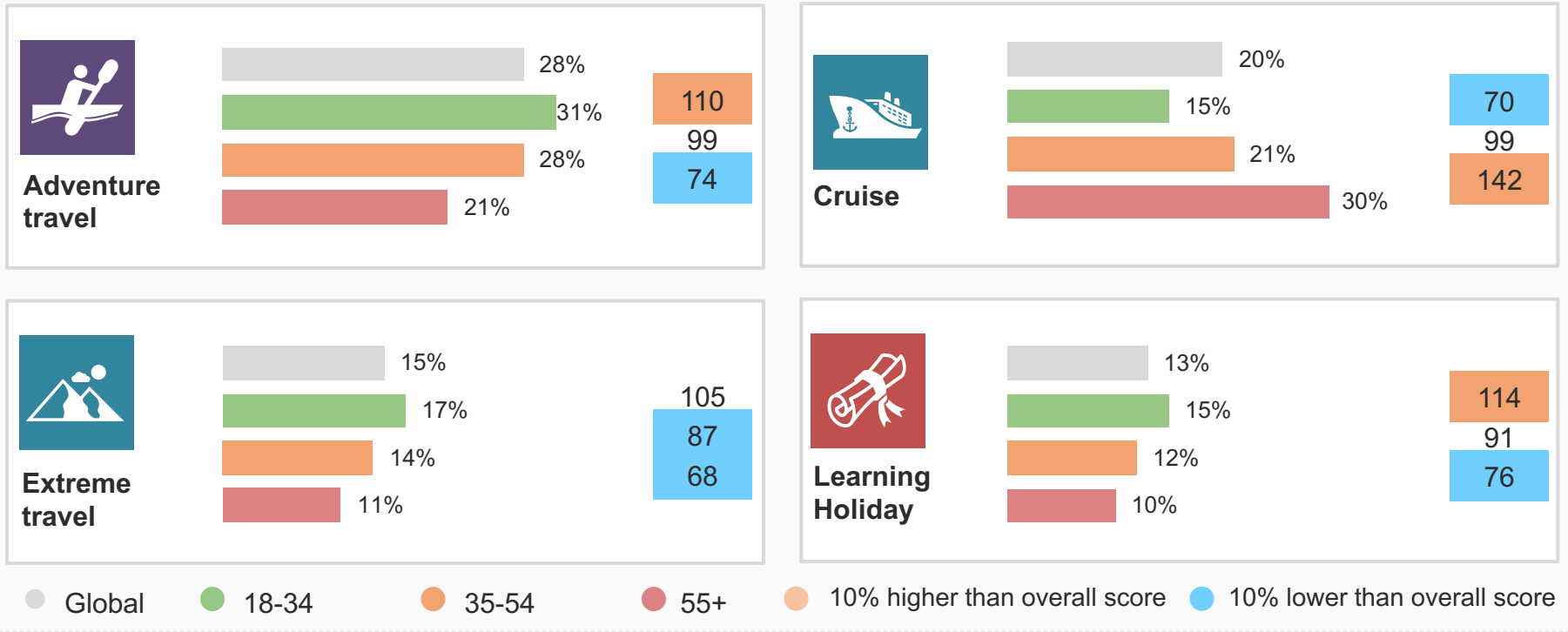
Adventure travel
- Global: 28%
- 18-34: 31%
- 35-54: 28%
- 55+: 21%
- 110
- 99
- 74

Cruise
- Global: 20%
- 18-34: 15%
- 35-54: 21%
- 55+: 30%
- 70
- 99
- 142

Extreme travel
- Global: 15%
- 18-34: 17%
- 35-54: 14%
- 55+: 11%
- 105
- 87
- 68

Learning Holiday
- Global: 13%
- 18-34: 15%
- 35-54: 12%
- 55+: 10%
- 114
- 91
- 76

Legend: Global | 18-34 | 35-54 | 55+ | 10% higher than overall score | 10% lower than overall score

CQ28a. Which of the following have you ever done when on holiday/vacation?
Base: All respondents (36,444); Age Groups: 18-34 (7,173), 35-54 (16,540), 55+ (12,731)

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Higher-income travelers more likely to experience different activities

From adventure travel to cruises, travelers with a high income are more likely to have done many different types of trips, but low income travelers are more likely to have been on independent travel

What types of holidays have you ever done?

	Independent travel	Adventure travel	Music event	Other festival	Cruise	Skiing or snowboarding
High income	31%	**33%**	**31%**	**30%**	**27%**	**20%**
Medium income	31%	27%	23%	23%	16%	15%
Low income	**38%**	21%	24%	23%	14%	15%

● 10% higher than overall score   ● 10% lower than overall score

CQ28a. Which of the following have you ever done when on holiday/vacation?
Base: All respondents (36,444); Income: Low (4,303), Medium (7,235), High (9,757)

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Positive perception of TripAdvisor is stronger among higher-income travelers

TripAdvisor is widely seen as the voice of the consumer amongst all age and income groups, but high income travelers view TripAdvisor as a source of good value deals that ensures they get a valuable experience for their money

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Attribute	Percentage
Is the voice of consumer/ traveler	66%
Is trustworthy	58%
Helps you find hidden treasures	47%
Introduces you to something you had not thought of before	42%
Inspires you to try something new	40%
Is authentic	35%
Provides the best deals	24%

	Age			Income		
	18-34	34-54	55+	Low	Medium	High
	102	99	90	93	94	101
	101	96	99	85	96	108
	103	97	97	90	97	110
	84	78	72	59	82	91
	107	97	84	84	99	104
	105	96	96	76	93	119
	112	95	95	112	137	174

● 10% higher than overall score
● 10% lower than overall score

CQ14 Which of the following, would you agree? Base: All who researched vacation online (30,149);
Age Groups: 18-34 (6,152), 35-54 (14,025), 55+ (9,972); Income: Low (3,281), Medium (5,970), High (8,282)

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NEEDS-BASED TRAVELER TYPOLOGIES

Introducing six traveler typologies (1 of 2)

Value Seekers
17%

"Help us make the most of our vacation"

Age: 25-34

Household Income: Medium

Traveling with: Children

Luxury Travelers
19%

"Show me how to enjoy and spend my money"

Age: 25-49

Household Income: High

Traveling with: Spouse/partner

Social Travelers
16%

"Let us share and engage with others"

Age: 25-49

Household Income: Medium - high

Traveling with: Children

CQ11. Below are a series of statements that people have made about their choices when booking a trip. To what extent do you agree, or disagree, with these statements? Base: All respondents (36,444)

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Introducing six traveler typologies (2 of 2)

Independent Travelers
31%

"Help me find my own way"

Age: 25-49

Household Income:
Low / high

Traveling with:
Solo

Researchers
35%

"Help me plan the perfect trip"

Age: 25-49

Household Income:
High

Traveling with:
Spouse/partner

Habitual Travelers
7%

"Help minimise time researching, but provide me with peace of mind"

Age: 35-64

Household Income:
Low

Traveling with:
Solo

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Attitude questions used to define typologies

Mean score on agreement scale, where
1 = strongly disagree, and 5 = strongly agree

	Overall	Value seekers	Luxury Travelers	Social Travelers	Independent Travelers	Researchers	Habitual Travelers
Enjoy trying to find the best possible option when planning my trip	4.39	4.56	4.55	4.57	4.39	**5.00**	3.81
I'm likely to choose a different destination than originally planned if I find a cheaper flight	2.86	**4.32**	2.77	3.15	2.75	2.92	2.6
I usually do some research on a destination's activities and restaurants before I travel	4.25	4.39	4.52	4.41	4.21	**5.00**	**1.69**
I pay close attention to the local exchange rate when deciding where to travel	3.12	**4.4**	3.18	3.45	2.99	3.31	2.64
I would never consider going on a trip alone	2.62	2.91	2.72	**4.53**	**1.00**	2.71	2.33
I enjoy sharing my trip experiences on Facebook, Twitter or Instagram	3.21	3.64	3.41	**4.47**	3.17	3.43	2.71
I'm prepared to pay a little more to ensure I have a luxury trip	3.42	3.51	**5.00**	3.71	3.32	3.59	2.81

● Agree / disagree defines group   ● Strongly agree / disagree defines group

CQ28A. Which, if any, of the following have you ever done while on holiday? Base: All respondents (36,444), Value Seekers (4,465), Luxury Travelers (6,421), Social Travelers (4,756), Independent Travelers (10,437), Researchers (13,133)

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Each different typology has very different attitudes towards travel

Price and culture differ in how they motivate each traveler type. Each type has a different set of preferences towards how they approach planning holidays

Mean score on agreement scale, where
1 = strongly disagree, and 5 = strongly agree

	Overall	Value seekers	Luxury Travelers	Social Travelers	Independent Travelers	Researchers	Habitual Travelers
Enjoy trying to find the best possible option when planning my trip	4.39	4.56	4.55	4.57	4.39	**5.00**	3.81
I'm likely to choose a different destination than originally planned if I find a cheaper flight	2.86	**4.32**	2.77	3.15	2.75	2.92	2.6
It's important that I stay in hotels with a brand name I know and trust	3.02	3.4	3.53	3.42	2.68	3.18	2.39
I usually do some research on a destination's activities and restaurants before I travel	4.25	4.39	4.52	4.41	4.21	**5.00**	**1.69**
My vacations are usually more about excitement and fun than relaxation and calm	3.29	3.66	3.39	3.55	3.31	3.48	2.8
Concerns about terrorism may affect my choice of destination	3.77	4.08	3.94	4.11	3.55	3.93	3.32
I care more about local history and culture than weather when travelling	3.51	3.74	3.5	3.53	3.59	3.57	3.26

● Agree / disagree defines group ● Strongly agree / disagree defines group

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Independent Travelers have had the widest range of experiences

Mean score on agreement scale, where
1 = strongly disagree, and 5 = strongly agree

	Overall	Value seekers	Luxury Travelers	Social Travelers	Independent Travelers	Researchers	Habitual Travelers
I pay close attention to the local exchange rate when deciding where to travel	3.12	4.4	3.18	3.45	2.99	3.31	2.64
I would never consider going on a trip alone	2.62	2.91	2.72	4.53	1.00	2.71	2.33
A trip seeing multiple destinations is better than staying in one place	3.57	3.92	3.62	3.84	3.48	3.68	3.26
The perfect trip is spending it on a warm, sunny beach	2.92	3.31	3.28	3.43	2.66	3	2.58
I enjoy sharing my trip experiences on Facebook, Twitter or Instagram	3.21	3.64	3.41	4.47	3.17	3.43	2.71
I love to travel to see new places and cultures I've never experienced before	4.47	4.61	4.71	4.54	4.62	4.68	4.05
I'm prepared to pay a little more to ensure I have a luxury trip	3.42	3.51	5.00	3.71	3.32	3.59	2.81
I'm likely to rent with "peer to peer" sites like Airbnb, HomeAway or FlipKey in future travel	2.86	3.37	2.87	3.11	2.8	2.94	2.65
It's important for me to travel to destinations where I know they speak my language	2.73	3.13	2.85	3.25	2.3	2.76	2.44

● Agree / disagree defines group   ● Strongly agree / disagree defines group

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Value Seekers and Luxury Travelers

Value Seekers
17%

- I am likely to choose a different destination if I find a cheaper flight
- I pay close attention to the local exchange rate

"Help us make the most of our vacation"

- Value travelers look to best deals and take time to see how far their money goes in other currencies. Half of these travelers travel with family and enjoy holidays to Malaysia and Brazil

- Their key consideration for heading to a destination are the exchange rate, finding cheap flights and using hotel points

- Travel distance is a key influence on where they stay, as are hotel promotions and airline points. One in five of Value travelers use TripAdvisor to research their transportation options

- Value Seekers tend to be 25-34 years old and have medium household income

Luxury Travelers
19%

- I am prepared to pay a little more to ensure I have a luxury trip

"Show me how to enjoy and spend my money"

- Luxury Travelers tend to have high household income and are happy to pay extra for their vacation experience. Their travels take them to China and Mexico

- Finding a good luxury destination price and using their hotel rewards are reasons for choosing certain destinations

- Three quarters are influenced by the view and the brand name of their choice of accommodation

- Luxury Travelers tend to be 25-49 years old, have high income and could either be traveling solo or with family

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Social Travelers and Independent Travelers

Social Travelers
16%

- I would never consider going on a trip alone
- I enjoy sharing my trip experiences on Facebook, Twitter or Instagram

"Let us share and engage with others"

- Socialites enjoy sharing their experiences with family and other travellers in person, and on social media with their wider network.
- They tend to return to a location previously visited for work and would select destinations that have affordable luxury prices
- Their top influence when making final decisions on accommodation are posts on social media and also, accommodation that provides babysitting services
- Socialites tend to be between 25-49 years old with a medium-high income and travel with family

Independent Travelers
31%

- I would never consider going on a trip alone

"Help me find my own way"

- Independent Travelers are happy to go-it alone. They are a mix of young adults and retirees with varying levels of income and head to destinations such as South Korea, Morocco and Mexico
- Their interests are mainly in locations that are off the beaten track and that are accessible through using airline reward points
- Accommodation price and the ratings/scores on a review website help them decide where to stay when on vacation
- 25-49 year old low/high income no family - retired

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Researchers and Habitual Travelers

Researchers
35%

- I enjoy trying to find the best possible option when planning my trip
- I usually do some research on a destination's activities and restaurants before I travel

"Help me plan the perfect trip"

- Researchers like to investigate all possibilities when planning their vacation. They tend to travel to Brazil or the USA and are unlikely to be travelling with children
- Their choice of destination is governed by the cultural experience they will get, finding a destination that has a good luxury price and meeting travelers at the same stage of life
- TripAdvisor play the biggest role in their choice of destination as they scour the site for online reviews
- Researchers tend to be between 25-49 years old, have high income and travel without children or family

Habitual Travelers
7%

- I usually do some research on a destination's activities and restaurants before I travel

"Help minimize time researching, but provide me with peace of mind"

- Habitual Travelers are less engaged with all stages of researching and booking a trip, and tend to spend less time researching before making their bookings
- They choose a destination for its culture and society, and the most popular trips are beach holidays, city breaks and to see friends and family.
- Whilst they do not enjoy planning as much as other travelers, they rely on TripAdvisor to ensure their accommodation meets their needs.
- Habitual Travelers tend to be male, aged between 35 and 64, and travel solo.

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Different cohorts display varying preferences for holiday type and peer-to-peer accommodation

o Value Seekers and Social Travelers tend to say they will rent with peer-to-peer providers and would also visit multiple destinations

o Over two in five Independent Travelers do not feel a warm sunny beach is the perfect holiday
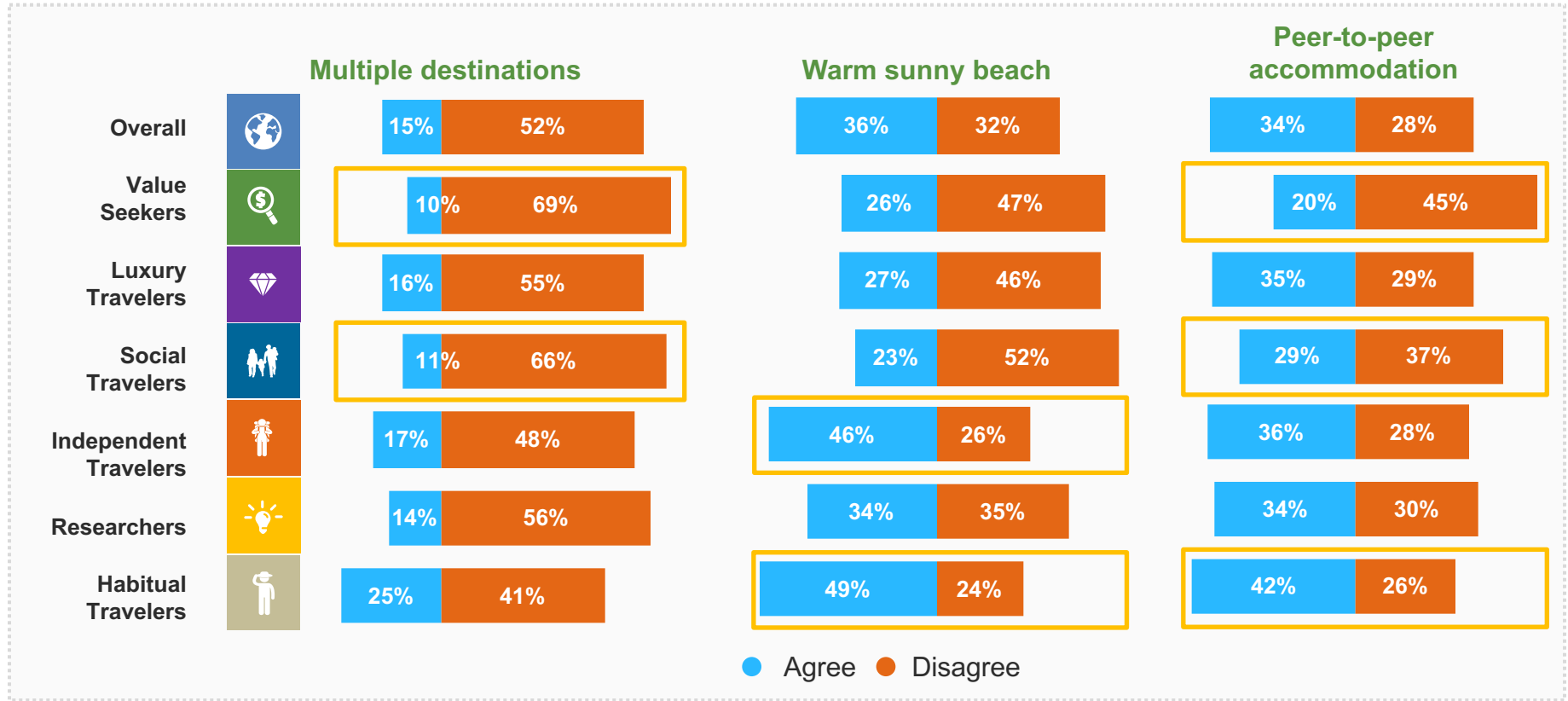
	Multiple destinations		Warm sunny beach		Peer-to-peer accommodation	
	Agree	Disagree	Agree	Disagree	Agree	Disagree
Overall	15%	52%	36%	32%	34%	28%
Value Seekers	10%	69%	26%	47%	20%	45%
Luxury Travelers	16%	55%	27%	46%	35%	29%
Social Travelers	11%	66%	23%	52%	29%	37%
Independent Travelers	17%	48%	46%	26%	36%	28%
Researchers	14%	56%	34%	35%	34%	30%
Habitual Travelers	25%	41%	49%	24%	42%	26%

● Agree ● Disagree

CQ11. Below are a series of statements that people have made about their choices when booking a trip. To what extent do you agree, or disagree, with these statements? Base: All respondents (36,444, Value Seekers (4,465), Luxury Travelers (6,421), Social Travelers (4,756), Independent Travelers (10,437), Researchers (13,133)

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Independent Travelers have had the widest range of experiences

o Independent Travelers are true explorers, possibly due to the fact that they usually travel alone
o On the other hand, Social Travelers are more reserved in their trip types as they have family considerations

	Overall	Value seekers	Luxury Travelers	Social Travelers	Independent Travelers	Researchers	Habitual Travelers
Beach holiday	57%	95	108	103	101	110	90
To explore the history of a city	56%	87	97	81	113	110	79
Visiting family/friends	52%	86	99	89	109	103	89
City break	52%	97	101	87	109	99	97
Solo/independent travel	34%	90	96	40	178	90	99
Group tour travel	30%	96	99	89	109	106	82
Adventure travel	28%	95	92	81	120	117	81
Attended a music event	28%	78	99	81	117	110	81

● 10% higher than overall score   ● 10% lower than overall score

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TripAdvisor is the main source of inspiration for all traveler types when researching accommodation

Researchers use a mix of sources when choosing accommodation, and almost two thirds rely on TripAdvisor as their main source

Sources of information used when deciding on accommodation
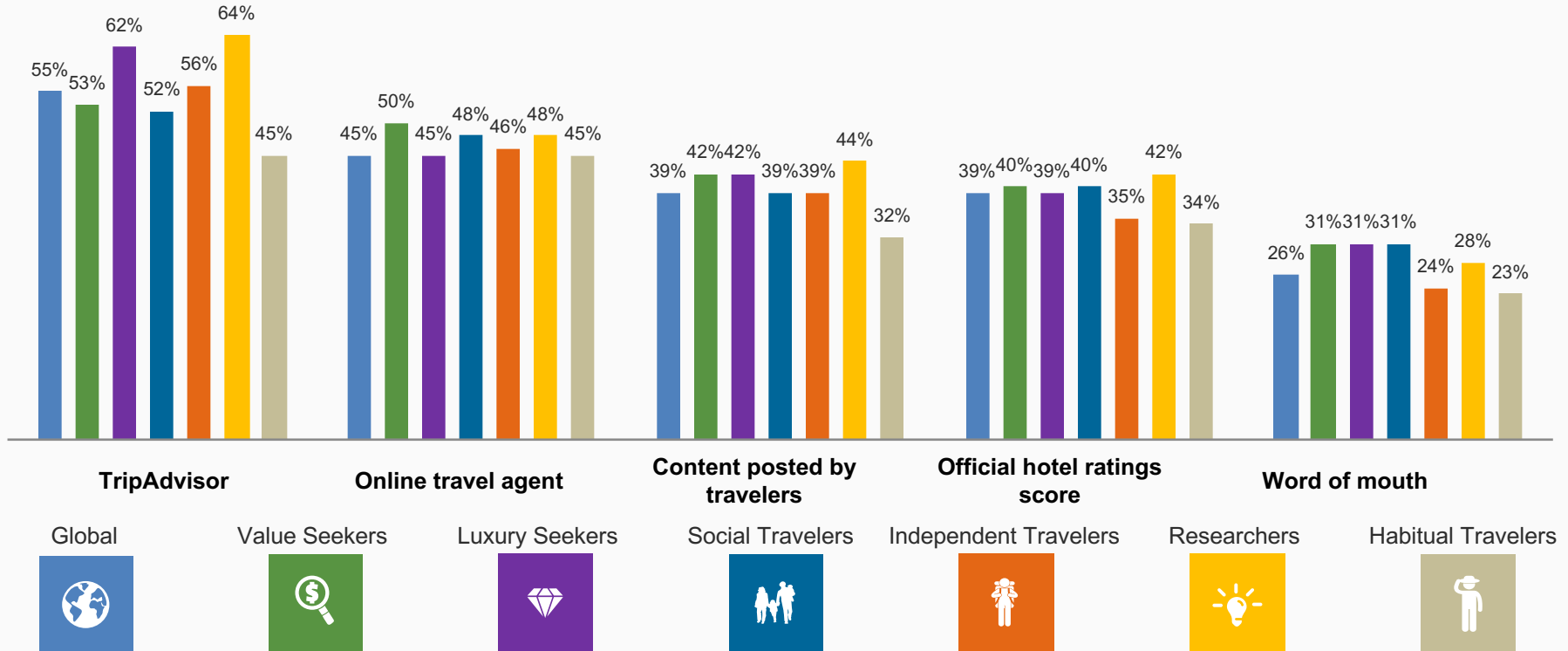
	TripAdvisor	Online travel agent	Content posted by travelers	Official hotel ratings score	Word of mouth
Global	55%	45%	39%	39%	26%
Value Seekers	53%	50%	42%	40%	31%
Luxury Seekers	62%	45%	42%	39%	31%
Social Travelers	52%	48%	39%	40%	31%
Independent Travelers	56%	46%	39%	35%	24%
Researchers	64%	48%	44%	42%	28%
Habitual Travelers	45%	45%	32%	34%	23%

Global · Value Seekers · Luxury Seekers · Social Travelers · Independent Travelers · Researchers · Habitual Travelers

CQ12. Which of the following sources of information, if any, did you use to plan your most recent trip? Base: All respondents (36,444), Value Seekers (4,465), Luxury Travelers (6,421), Social Travelers (4,756), Independent Travelers (10,437), Researchers (13,133)

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Traveler types display different reasons for selecting destinations

Value Seekers and Social Travelers are quite price and family conscious, while Independent Travelers and Researchers seek cultural experiences
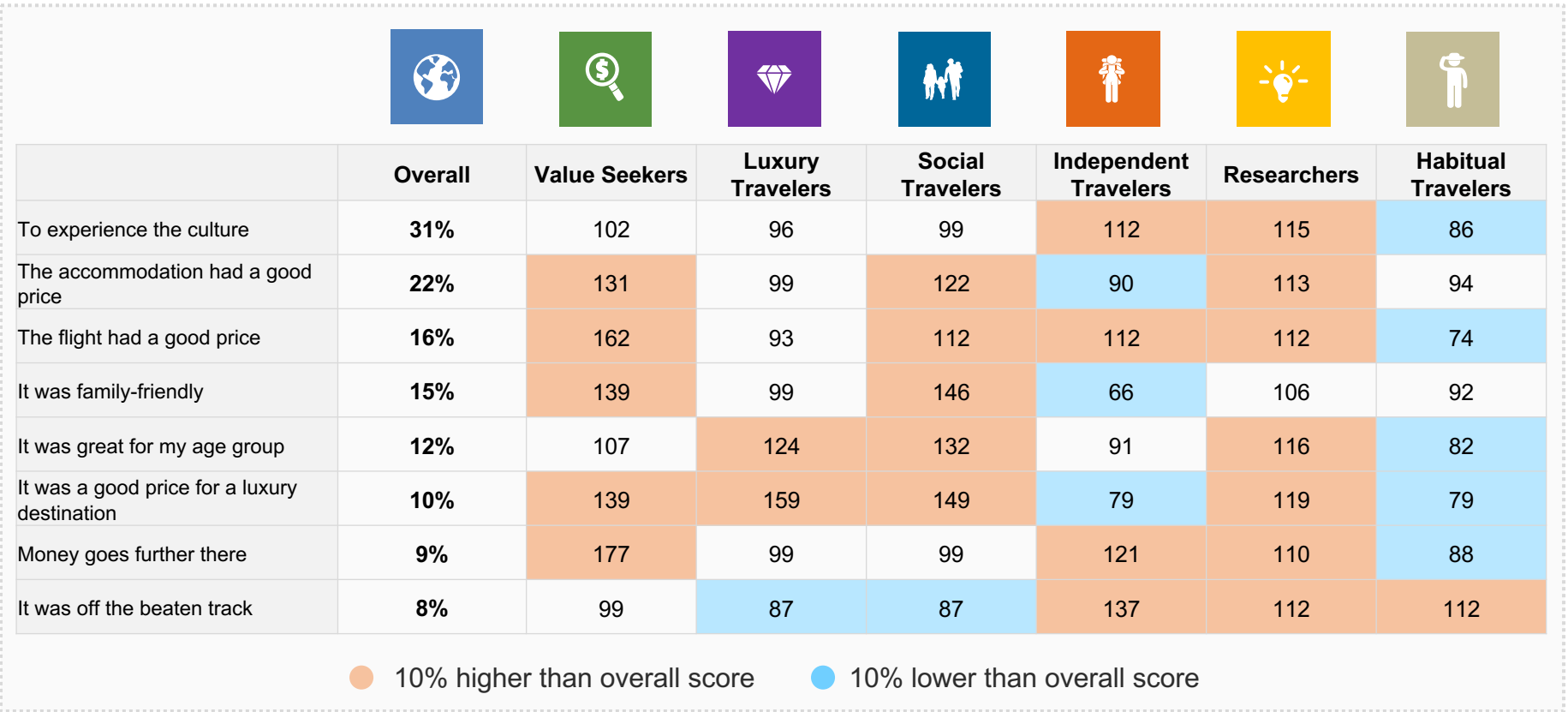
	Overall	Value Seekers	Luxury Travelers	Social Travelers	Independent Travelers	Researchers	Habitual Travelers
To experience the culture	**31%**	102	96	99	112	115	86
The accommodation had a good price	**22%**	131	99	122	90	113	94
The flight had a good price	**16%**	162	93	112	112	112	74
It was family-friendly	**15%**	139	99	146	66	106	92
It was great for my age group	**12%**	107	124	132	91	116	82
It was a good price for a luxury destination	**10%**	139	159	149	79	119	79
Money goes further there	**9%**	177	99	99	121	110	88
It was off the beaten track	**8%**	99	87	87	137	112	112

● 10% higher than overall score   ● 10% lower than overall score

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⊙⊙ tripadvisor®

Transportation booking channels and platforms differ by traveler type and mode of transport

Flights on smartphone	Overall	Value Seekers	Luxury Travelers	Social Travelers	Independent Travelers	Researchers	Habitual Travelers
Travel provider's website(s)	8%	174	149	112	87	112	112
Online travel agent/tour operator website	10%	169	129	139	69	89	59
Booking directly on Google	17%	181	152	181	99	111	81

Trains via ota	Overall	Value Seekers	Luxury Travelers	Social Travelers	Independent Travelers	Researchers
Mobile/smartphone	25%	175	47	107	107	55
Laptop/PC	75%	84	106	96	91	115

● 10% higher than overall score   ● 10% lower than overall score

Habitual Travelers not included. Base size too low

CQ23 You said you used these online methods to book flights for your most recent trip. Did you do this from your mobile/smartphone, tablet or laptop/PC? Respondents who used an online method to book accommodation (9,070), Value Seekers (1,080), Luxury Travelers (1,636), Social Travelers (1,028), Independent Travelers (3,079), Researchers (3,584), Habitual Travelers (226); CQ23B You said you used these online methods to book the train for your most recent trip. Did you do this from your mobile/smartphone, tablet or laptop/PC? Respondents who used an online method to book accommodation (2,233), Value Seekers (281), Luxury Travelers (355), Social Travelers (232), Independent Travelers (781), Researchers (915), Habitual Travelers (18)

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Researchers and Social Travelers particularly enjoy sharing their experiences on social networks

o Two thirds of Social Travelers share pictures on Facebook and two in five on Instagram

o One quarter of Social, Independent Travelers and Researchers share pictures on TripAdvisor while half of Independent Travelers and Researchers write a review

	Overall	Value Seekers	Luxury Travelers	Social Travelers	Independent Travelers	Researchers	Habitual Travelers
Shared pictures on TripAdvisor	22%	99	99	108	113	117	76
Shared a review on TripAdvisor	44%	83	104	94	113	117	90
Shared pictures on Facebook	43%	106	99	150	99	113	76
Posted a status about my holiday on Facebook	29%	106	106	151	106	116	78
Checked in at locations on Facebook	24%	124	107	162	103	120	78
Shared pictures on Instagram	24%	132	112	157	95	120	66

● 10% higher than overall score   ● 10% lower than overall score

CQ26. Did you share information about your trip in any of the following ways? Base: All respondents (36,444, Value Seekers (4,465), Luxury Travelers (6,421), Social Travelers (4,756), Independent Travelers (10,437), Researchers (13,133), Habitual Travelers (2,604)

52

tripadvisor®

What do Value Seekers think of ⚇tripadvisor® ?

	Value Seekers	Overall	Diff
Is the voice of consumer/traveler	56%	66%	-10
Is trustworthy	54%	58%	-4
Helps you find hidden treasures	44%	47%	-3
Introduces you to something you did not think of before	42%	42%	0
Inspires you to try something new	40%	40%	0
Is authentic	34%	35%	-1
Provides the best deals	33%	24%	+9
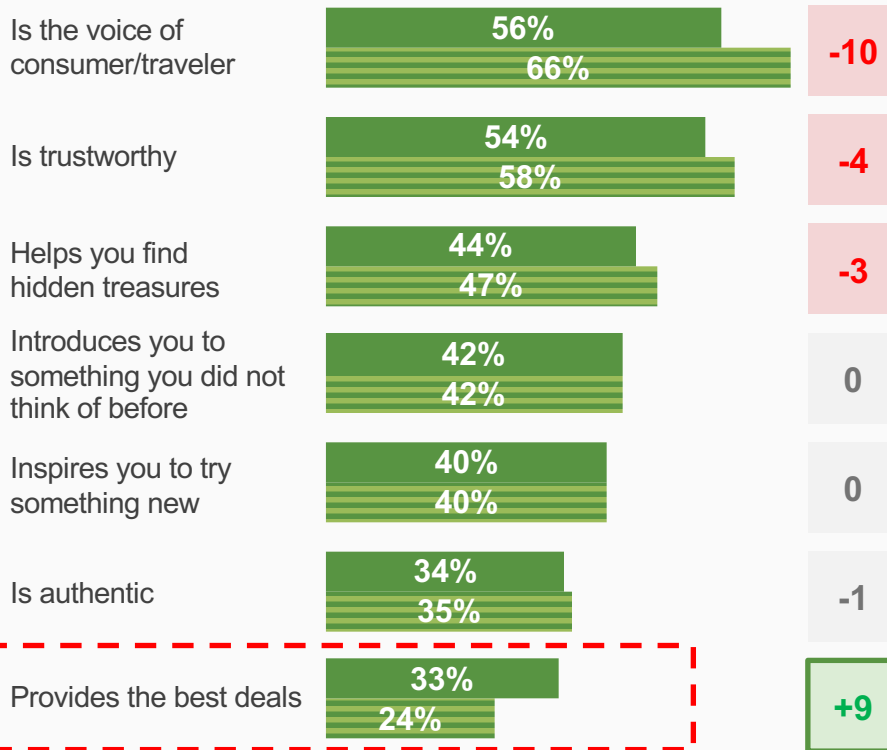
⬤ Overall   ⬤ Value Seekers

Compared to the global picture, Value Seekers see TripAdvisor as providing the best deals: only one quarter (24%) of all respondents think TripAdvisor provides the best deals

Where do Value Seekers differ?

Babysitting service
One in five (22%) of Value Seekers choose accommodations that provide babysitting services – just one in ten (10%) average travelers say the same

Kids Club
25% of Value Seekers select their accommodation because there is entertainment for kids (compared to 13% average)

★★★★★

45% *(28%)*

I'm likely to rent with peer to peer sites in the future

Value Seekers
Value Seekers particularly value TripAdvisor to help them find deals

⚇tripadvisor®

More likely to use smartphones for the following channels when gathering inspiration and booking accommodation

38% *(33%)*
Official hotel ratings on smartphone

34% *(27%)*
Other transport providers on smartphone

Accommodation Booking: Device & Channel

29% *(15%)*
Other travel review websites on smartphone

18% *(8%)*
Private accommodation providers on smartphone

Financial considerations drive destination choice

29% *(22%)*
Accommodation has a good price

26% *(16%)*
Flight had a good price

17% *(9%)*
It was a cheap flight

Top holiday types

Beach holiday
55%
(57%)

City break
51%
(52%)

Exploring city culture
49%
(56%)

Importance to final decision to book accommodation

97%
Accommodation price

90%
Ratings on review site

89%
Amenities

CQ9. What were the main reasons for choosing where you went on your last trip?; CQ12. Which of the following sources of information, if any, did you use to plan your most recent trip?; CQ19. Staying with your most recent trip, how important were each of the following in your final decision to book your accommodation?; CQ26 Did you share any information about your most recent trip in any of the following ways?; CQ28A. Which, if any, of the following have you ever done while on holiday/vacation? Base: All Respondents (36,444), Value Seekers (4,465)

Value Seekers
More evidence that mobiles are heavily adopted by Value Seekers

tripadvisor®

What do Luxury Travelers think of 👓 tripadvisor® ?

Statement	Value	Difference
Is the voice of consumer/traveler	67% / 66%	+1
Is trustworthy	60% / 58%	+2
Helps you find hidden treasures	49% / 47%	+2
Introduces you to something you did not think of before	44% / 42%	+2
Inspires you to try something new	42% / 40%	+2
Is authentic	41% / 35%	+6
Provides the best deals	29% / 24%	+5

● Overall   ● Luxury Travelers
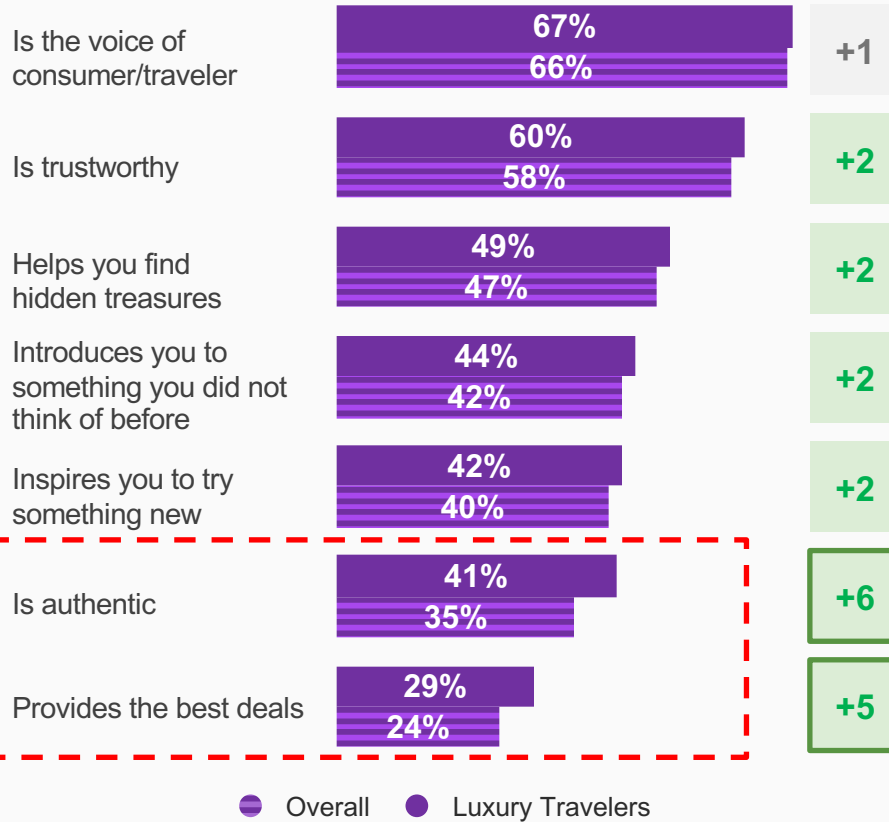
Compared to the global picture, Luxury Travelers believe TripAdvisor is authentic. Four in ten Luxury Travelers think TripAdvisor is authentic, compared to 35% overall.

Where do Luxury Travelers differ?
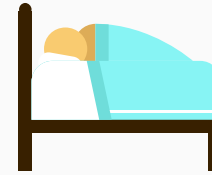
Deciding on accommodation

More than six in ten **(62%)** look at their accommodation options on TripAdvisor.

46%
(32%)

The perfect trip is spending it on a **warm sunny beach**
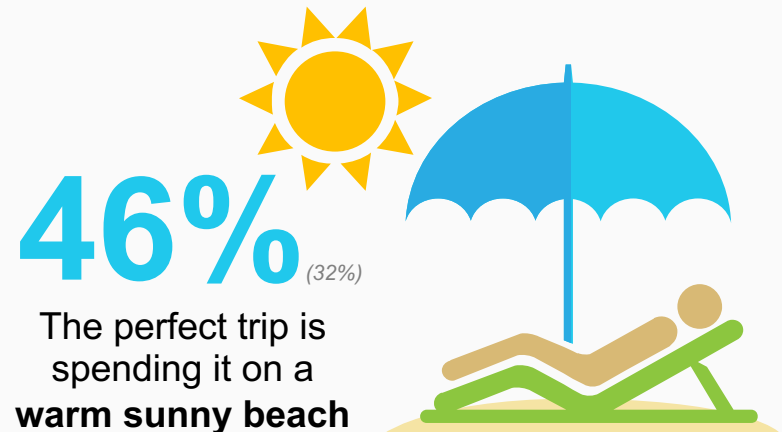
Luxury Travelers
TripAdvisor positioned strongly among Luxury Travelers

👓 tripadvisor®

Luxury Travelers interact with TripAdvisor as they plan each part of their trip

Research:
Device & Channel

26% *(19%)*

OTA on Mobile App

Accommodation Booking:
Device & Channel

12% *(4%)*

Directly on Google on mobile app

10% *(8%)*

Accommodation website on smartphone

Reasons for Choosing a Destination

19% *(16%)*

Recommendation

16% *(10%)*

Good price for luxury

Top holiday types

Beach holiday

62%

(57%)

City break

55%

(56%)

Exploring city culture

53%

(52%)

More likely to…

Spa

26%

(19%)

Cruise

24%

(20%)

Ski/Snowboard

20%

(17%)

Importance to final decision to book accommodation

90%
Ratings on a review site

88%
Amenities

73%
View from accommodation

CQ9. What were the main reasons for choosing where you went on your last trip?; CQ12. Which of the following sources of information, if any, did you use to plan your most recent trip?; CQ19. Staying with your most recent trip, how important were each of the following in your final decision to book your accommodation?; CQ26 Did you share any information about your most recent trip in any of the following ways?; CQ28A. Which, if any, of the following have you ever done while on holiday/vacation? Base: All Respondents (36,444), Luxury Travelers (6,421)

Luxury Travelers

Luxury Travelers base destination choice on recommendation and price and tend to use apps more than other travelers

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What do Social Travelers think of tripadvisor ?

	Overall / Social Travelers	Difference
Is the voice of consumer/traveler	59% / 66%	-7
Is trustworthy	58% / 58%	0
Helps you find hidden treasures	58% / 47%	+11
Introduces you to something you did not think of before	40% / 42%	-2
Inspires you to try something new	41% / 40%	+1
Is authentic	37% / 35%	+2
Provides the best deals	32% / 24%	+8

● Overall ● Social Travelers
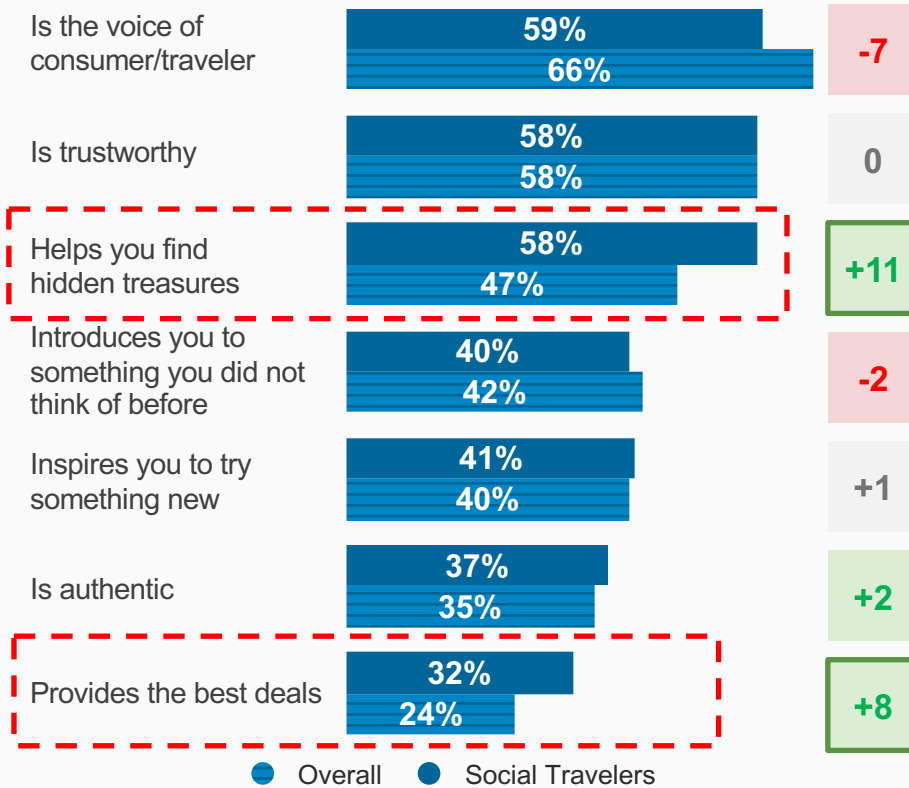
Almost six in ten Social Travelers think that TripAdvisor helps them find hidden treasures. Compared to other travelers, they're also more likely to say that TripAdvisor provides the best deals

Where do Social Travelers differ?

Babysitting service
One in five (21%) of Social Travelers choose accommodations that provide babysitting services – just one in ten (10%) average travelers say the same

Kids Club
25% of Social Travelers select their accommodation because there is entertainment for kids (compared to 13% average)

77% *(66%)*
Concerns about terrorism affect my destination choice

63% *(52%)*
Prepared to pay extra for luxury

Social Travelers
Social Travelers look at TripAdvisor to find hidden treasures and are more likely to require child care services when on a trip

tripadvisor®

Sources of Information

Word of Mouth
An important source of information across all stages of planning. 43% choose destination based on word of mouth, compared to 38% overall

Content posted by family and friends
Content posted online is more influential than for other groups. Three in ten (30%) use content posted by family and friends to research entertainment/attractions

Gender
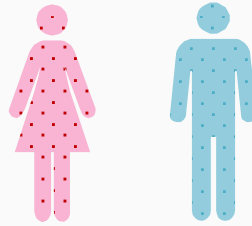
54% **46**%

Top Reasons for Choosing a Destination

23% *(16%)*

Good Price for Luxury

21% *(10%)*

Recommended by a Friend/Relative

Top holiday types

Beach holiday
59%
(57%)

Friends/ Family
47%
(52%)

Exploring city culture
46%
(56%)

Heavy Social Media Sharers

Review **42%** *(44%)*

Pictures **65%** *(43%)*

Check-in **39%** *(44%)*

Pictures **38%** *(24%)*

Videos **20%** *(11%)*

Importance to final decision to book accommodation

91%
Ratings on a review site

86%
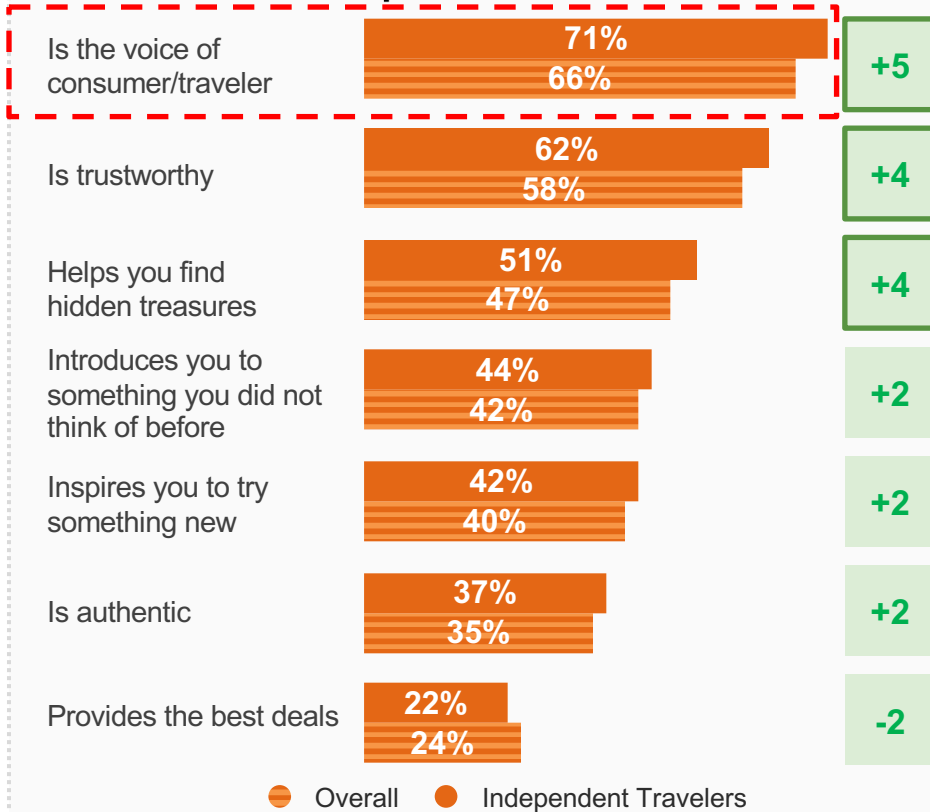Photos/ Video
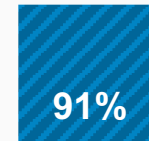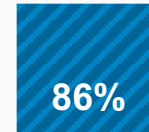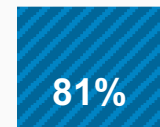
81%
Travel Distance/Time

CQ9. What were the main reasons for choosing where you went on your last trip? CQ12. Which of the following sources of information, if any, did you use to plan your most recent trip?; CQ19. Staying with your most recent trip, how important were each of the following in your final decision to book your accommodation?; CQ26 Did you share any information about your most recent trip in any of the following ways?; CQ28A. Which, if any, of the following have you ever done while on holiday/vacation? Base: All Respondents (36,444), Social Travelers (4,756)

Social Travelers
Social Travelers tend to place a high reliance on reviews and opinions from other travelers when researching and booking their trip

tripadvisor®

What do Independent Travelers think of tripadvisor® ?

Statement	Overall / Independent Travelers	Diff
Is the voice of consumer/traveler	71% / 66%	+5
Is trustworthy	62% / 58%	+4
Helps you find hidden treasures	51% / 47%	+4
Introduces you to something you did not think of before	44% / 42%	+2
Inspires you to try something new	42% / 40%	+2
Is authentic	37% / 35%	+2
Provides the best deals	22% / 24%	-2

● Overall ● Independent Travelers

71% of Independent Travelers believe that TripAdvisor is the voice of the consumer, compared to two-thirds overall. They're also more likely to find TripAdvisor trustworthy.

Where do Independent Travelers differ?

58% *(53%)*

Care more about history and culture than the weather

Independent Travelers use social media like others, but more of them share a TripAdvisor review

Review	Pictures	Photos
50%	**43%**	**25%**
(44%)	*(43%)*	*(22%)*

Independent Travelers
Independent Travelers see TripAdvisor as an important resource to plan their trip and have positive thoughts about the brand

tripadvisor®

Use the following channels when gathering inspiration and booking accommodation:

Research:
Device & Channel

76% *(69%)*

Travel Guide on laptop

Accommodation Booking:
Device & Channel

24% *(19%)*

Directly on Google on smartphone

Reasons for choosing a destination

35% *(31%)*

Experience the Culture

11% *(8%)*

Off the beaten path

Top holiday types

Exploring city culture

64%
(56%)

Solo Travel

61%
(34%)

Beach holiday

58%
(57%)

More likely to…

Adventure

34%
(28%)

Extreme

19%
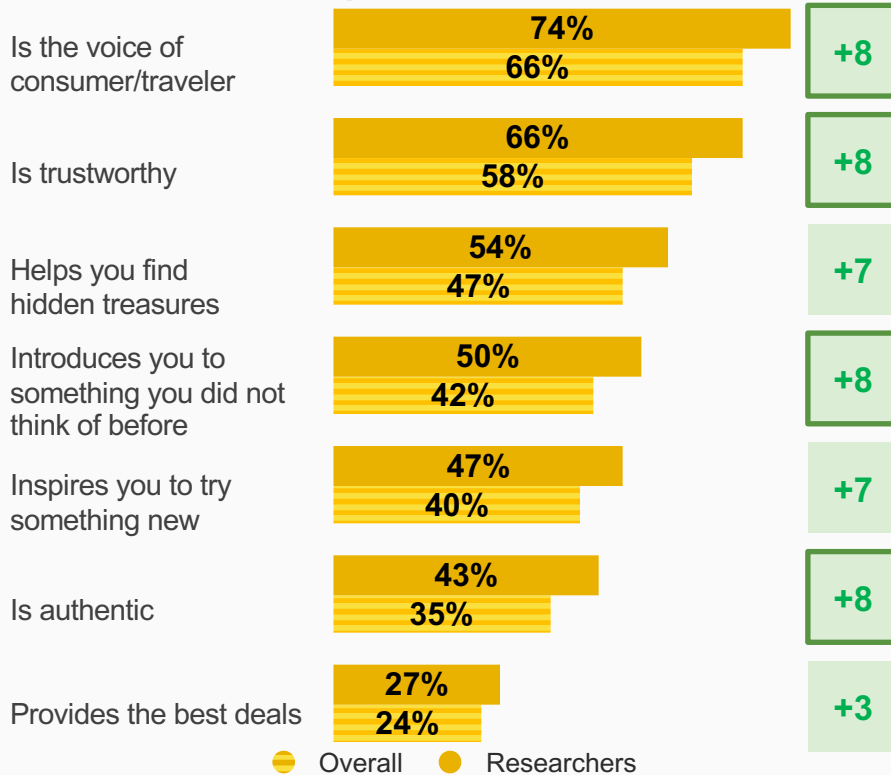*(15%)*

Learning

18%
(13%)

CQ9. What were the main reasons for choosing where you went on your last trip?; CQ12. Which of the following sources of information, if any, did you use to plan your most recent trip?; CQ19. Staying with your most recent trip, how important were each of the following in your final decision to book your accommodation?; CQ26 Did you share any information about your most recent trip in any of the following ways?; Which, if any, of the following have you ever done while on holiday/vacation? Base: All Respondents (36,444), Independent Travelers (10,437)

Independent Travelers
Independent Travelers want adventures and exploration and rely heavily on online content to help find it
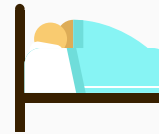
◎◎ tripadvisor®

What do Researchers think of 🔵🔵 trip**advisor** ?

Statement	Overall	Researchers	Difference
Is the voice of consumer/traveler	66%	74%	+8
Is trustworthy	58%	66%	+8
Helps you find hidden treasures	47%	54%	+7
Introduces you to something you did not think of before	42%	50%	+8
Inspires you to try something new	40%	47%	+7
Is authentic	35%	43%	+8
Provides the best deals	24%	27%	+3

🟡 Overall   🟠 Researchers

Researchers rate TripAdvisor more highly than other travelers, with consistently higher agreement across each of these ratings. Three quarters of Researchers believe that TripAdvisor is the voice of the consumer & two thirds think it is trustworthy.
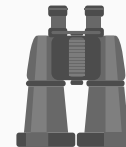
Where do Researchers differ?

Researching destination
Over half (54%) of researchers use TripAdvisor when comparing destination

Deciding on accommodation
TripAdvisor is most influential amongst Researchers when they are looking at accommodation options. 64% use it as this stage

Looking at entertainment/attractions
More than six in ten Researchers use TripAdvisor when researching entertainment/attractions at their destination

Researchers
Researchers trust TripAdvisor to provide the voice of the consumer when deciding on each stage of the journey

🔵🔵 trip**advisor**

Use the following channels when gathering inspiration and booking accommodation:

Research:
Device & Channel

60% (53%)
Content by friends & family on laptop

Accommodation booking:
Device & Channel

80% (71%)
Directly on Google on laptop

Travel needs

71% (66%)
Concerns about terrorism affect my destination choice

59% (52%)
Prepared to pay extra for luxury

Top Reason for Choosing a Destination

36% (31%)
Experience the Culture

Gender

53% (47%)   **47%** (53%)

Top holiday types

Beach holiday
63% (57%)

Friends/ Family
62% (56%)

Exploring city culture
54% (52%)

Heavy Social Media Sharers

Review **52%** (44%)

Pictures **49%** (43%)

Check-in **34%** (29%)

Review **26%** (22%)

Importance to final decision to book accommodation

95%
Price
(93%)

91%
Ratings on Review Site
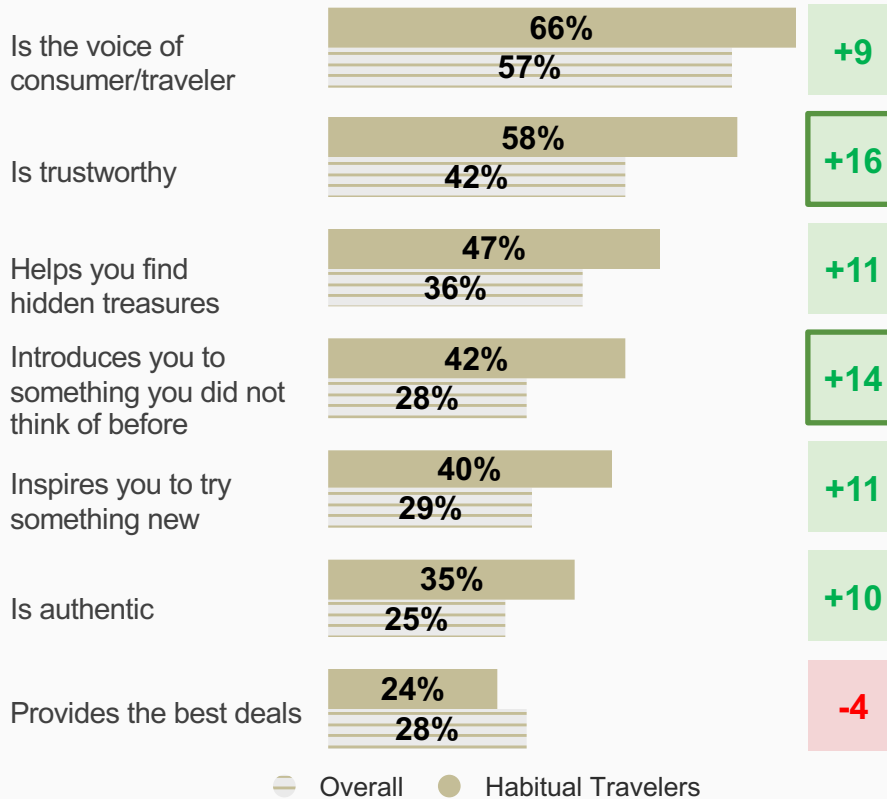(86%)

86%
Proximity to Attractions
(80%)

CQ9. What were the main reasons for choosing where you went on your last trip; CQ12. Which of the following sources of information, if any, did you use to plan your most recent trip?; CQ19. Staying with your most recent trip, how important were each of the following in your final decision to book your accommodation?; CQ26 Did you share any information about your most recent trip in any of the following ways?; CQ28A. Which, if any, of the following have you ever done while on holiday/vacation? Base: All Respondents (36,444), Researchers (13,133)

Researchers
Researchers are the most engaged TripAdvisor users, for planning and sharing

tripadvisor®

What do Habitual Travelers think of ⚆⚆ tripadvisor® ?

Attribute	Habitual Travelers	Overall	Difference
Is the voice of consumer/traveler	66%	57%	+9
Is trustworthy	58%	42%	+16
Helps you find hidden treasures	47%	36%	+11
Introduces you to something you did not think of before	42%	28%	+14
Inspires you to try something new	40%	29%	+11
Is authentic	35%	25%	+10
Provides the best deals	24%	28%	-4

⊜ Overall   ● Habitual Travelers

Habitual Travelers rate TripAdvisor highly for providing the best deals. For all other scores, they score below the average traveler.

Where do Habitual Travelers differ?

Researching destination
Habitual researchers know where they want to go. Half (52%) of Habitual Travelers start their journey by deciding on their destination, compared to 45% overall.

Path to Purchase journey
The research phase is shorter for Habitual Travelers than for others. One quarter do their research in one to two days, compared to 19% overall.

Channels used to research destination
Fewer channels are used by Habitual Travelers to research their destination, they under index on online and offline channels at this phase.

Habitual Travelers
Habitual Travelers spend less time researching and engage with fewer channels when planning their trip

⚆⚆ tripadvisor®

Researching accommodation

45% *(81)*
TripAdvisor

45% *(99)*
Online Travel Agent

Top Reason for Choosing a Destination

27% *(86)*
Experience the Culture

21% *(94)*
Hotel/accommodation had a good price

Top holiday types

Beach holiday
52% *(90)*

City break
51% *(97)*

Friends/Family
47% *(89)*

Travel needs

67% *(76%)*
Enjoy trying to find the best possible option when planning my trip

52% *(61)*
Prepared to pay extra for luxury

Gender

37% *(78)*

63% *(118)*

CQ9. What were the main reasons for choosing where you went on your last trip; CQ12. Which of the following sources of information, if any, did you use to plan your most recent trip?; CQ28A. Which, if any, of the following have you ever done while on holiday/vacation? CD1. Are you…? Base: All Respondents (36,444), Habitual Travelers (2,604)

Habitual Travelers

Habitual Travelers are less likely to enjoy finding the best possible option when planning, but use TripAdvisor when researching accommodation

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