Tripadvisor

TRAVEL IN 2022
A LOOK AHEAD

In partnership with Ipsos MORI

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Introduction

For millions, the COVID-19 pandemic has brought to light just how important the simple act of traveling is and how much enrichment it brings to life. The world continues to feel the effects of COVID-19 with new variants, but people across the globe are still finding ways to safely get back out there and explore the world.

But for many, the way we do that might just have evolved forever.

In a wide-ranging survey of over 10,000 18-75 year olds across the United States, United Kingdom, Australia, Singapore and Japan carried out in November 2021, Ipsos MORI (in research conducted for Tripadvisor) looked to the year ahead for travelers and discovered some interesting patterns. Respondents were asked about their sentiments regarding their future travel inclinations, when they plan to travel, and what they're looking for in a trip when they do.

Additionally, travelers (who traveled in 2019 or are likely to travel in 2022) were asked about changes in their behavior with regard to "how" they intend to travel and ways they anticipate deriving more value out of future travel – especially looking into the rise of travel subscription services and the adoption of experiential travel spreading in popularity beyond millennial adopters to audiences of all ages.

There's no question, some traveler habits will change in 2022. And the industry would be wise to be mindful of these behavioral shifts.

For one: many travelers continue to find it difficult to stay in a hotel that doesn't have cleanliness policies that align to their expectations. Also, for many, the old way of travel planning may not be good enough anymore. We at Tripadvisor believe travelers want more value for their dollar, something more meaningful out of their trip.

A need for enlightenment and greater fulfillment is coming in the form of something more experiential. Like a chef named Oscar Carrizosa from Oaxaca, Mexico, who will teach you to cook like a local using the seasonings he inherited from his grandmother. Or maybe you want to visit the Sistine Chapel before it opens with a skip-the-line Vatican tour. These are just a few examples of how travel is getting personal — and it's great to see.

And although they want to experience something truly new, travelers aren't necessarily looking to plan every last bit of travel themselves. Instead, some are seeking guided cultural experiences and subscription services that help them plan their getaway and get more value out of their booking along the way.

While the news headlines about COVID variants might just be our new normal for a little while longer, one thing is for sure: people are learning how to live with it despite the ups and downs — and finding ways to satisfy their hunger to see the world.

Read on for an in-depth picture of the travel landscape in 2022.

A Bright 2022

Given last year's news about new variants and booster shots, COVID-19 cases rising and declining, the loosening and the re-tightening of restrictions for daily life in many countries...one might feel conflicted about what is to come in the world of travel in 2022. However, sentiment data — gathered in partnership with Ipsos MORI from more than 10,000 adults aged 18-75 in five countries — shows that the majority of respondents are indeed planning to get out to see the big wide world next year — whether within their own country, or overseas.

Across the five markets surveyed, the majority of respondents said they were either very likely or fairly likely to travel for leisure, to travel to visit friends or family, or to travel for business purposes in 2022. And, in what is further great news for the tourism industry, results showed that intent to travel in all five markets surveyed was higher than the travel respondents reported to have actually taken in 2019.

Respondents in Singapore were the most likely to say they will travel in 2022 at 89%, followed by respondents in the UK at 85%. Australia and the United States fell in the middle of the five markets surveyed, with 79% and 78%, respectively, saying that they are likely to travel for those reasons in 2022.

Japanese respondents were the least likely to say they will travel in 2022, with 58% saying that they are likely to do so — still a healthy proportion of people despite being the lowest of the five markets surveyed.

Q. Now thinking about your plans for 2022, how likely or unlikely are you to travel for the following reasons in 2022?

Likely to travel in 2022*

*Percentage of those very or fairly likely to travel abroad or within their country for one or more of six reasons for leisure, business or to visit friends or relatives

Base: All Adults aged 18-75 in the UK (2,199), the US (2,191), Australia (2,000), Japan (2,000), Singapore (2,000)

DOMESTIC TRAVEL

> Choosing domestic destinations over international destinations next year seems to have a basis in how the world is handling traveling in the shadow of COVID-19

The Allure of Domestic Travel

It’s perhaps hard to imagine a world in which travel returns to pre-pandemic levels, but the sentiment data gathered in partnership with Ipsos MORI shows prospects are high for a strong rebound within the hospitality industry. Furthermore, recent travel and hospitality industry earnings announcements have reported increased consumer demand, in some cases returning to 2019 levels, with some Wall Street pundits predicting a return to growth in the years ahead.

When looking at all five markets surveyed, comparing their reported travel in 2019 versus how likely or unlikely they are to travel in 2022, on average, intent for leisure travel overseas in 2022 (those likely to travel) range from -13 percentage points (pp) (in Singapore), to +6pp (in the US), compared to international leisure travel in 2019, while 2022 domestic leisure travel intent ranges from +6pp (Japan) to +10pp (Australia) against reported domestic leisure travel in 2019[1].

When inspecting the survey results from each of the five markets individually, for some, the potential rebound appears even stronger. In the United States for example, intent for leisure travel abroad is up 6pp compared to 2019, while domestic leisure travel plans for 2022 are up 8pp against 2019. In the UK, leisure travel intent is up 5pp for 2022 compared to 2019 for destinations abroad and up 8pp for domestic leisure travel.

Australian travelers' likelihood of traveling in 2022 versus what they reported to have done in 2019 is up 3pp for international leisure travel and 10pp when looking at domestic leisure travel.

For Japan and Singapore, the picture seems less positive when it comes to international leisure travel, as the results of the survey show intent is down 2pp and 13pp respectively. However, it's important to note that even though for Singaporeans international travel intent is down compared with reported travel in 2019, at 53%, Singapore still has the highest proportion of respondents likely to travel abroad in 2022 of any of the countries surveyed.

Business travel for all five markets surveyed tells a similar story. In the UK, Australia and the US, the proportion of those likely to take an international business trip in 2022 is up 1pp, 3pp and 4pp, respectively, compared to the same type of travel in 2019. In Japan, international business travel intent is on par with reported travel in 2019, while Singapore is down 2pp. Looking at domestic business travel, the proportion of those likely to take this type of trip in 2022 is higher than the same type of travel compared with 2019 and range from +2pp (UK, US and Japan) to +5pp (Singapore).

Choosing domestic destinations over international destinations next year seems to have a basis in how the world is handling traveling in the shadow of COVID-19, some of which is impacted by the discovery of new variants. The survey results show that in every country, having the ability to travel to another destination without needing to self-isolate both upon arriving at their destination and after returning home is considered important by the majority of respondents when making decisions about their next travel destinations.

But while travel precautions and restrictions are factors many travelers want to avoid, personal safety concerns post-pandemic remain alive and well. Approximately 7 in 10 respondents in each of the markets said that destinations that have a low number of COVID-19 cases are important when making a decision on where to travel next. Netting out, travelers largely still choose the simpler and easier path when choosing domestic or near regional travel over international.

[1] See appendix for breakdown of data associated with this section.

ACTIVITIES & INTERESTS

> When thinking about their future travel plans, the 'new' is important for the majority of respondents

More Time to Enjoy New Activities

Regardless of why travelers head out for their next excursion, what is clear from the findings of this Ipsos MORI survey, is that when thinking about their future travel plans, the 'new' is important for the majority of respondents. The pandemic also had an impact on what people consider to be more important to them when planning trips in 2022 or beyond, compared to pre-pandemic trips.

A whopping 75% of Americans say it's **important** they "see new places" when thinking about their future travel plans, nearly matching the 74% of Australians, 73% of Singaporeans and 70% of Britons who said the same.

- More than a third to nearly half of all travelers surveyed by Ipsos MORI in the United States (41%), UK (38%), Australia (46%), Japan (34%) and Singapore (49%) said that traveling to a destination they've never been to before would be **more important** to them now, compared to trips they took in 2019, when choosing where to travel.
- About a third of respondents in each market (and more than 4 in 10 in Singapore) also said they are now more open to exploring new travel destinations than before the pandemic.

This appetite for the "new" provides the perfect opportunity for businesses to capture a new customer, so they should bear this in mind when planning marketing strategies for the year ahead.

Second, the top three most important considerations in future travel plans to visit a destination was to get immersive by:

- Seeing new places
- Having new experiences
- Learning about history and culture

The majority of respondents said it's important to them that they learn about the culture and history of their destination when they consider their future travel plans.

When planning future trips, 34% of American travelers said that it's **more important** now than before the pandemic that they choose a destination where they can immerse themselves in "authentic local experiences," matching those in the UK who said the same.

Singaporean travelers were the most likely to immerse themselves in authentic local experiences, with 44% of travelers saying it was **more important** now in their travel plan decision making than in trips they took in 2019, before the pandemic.

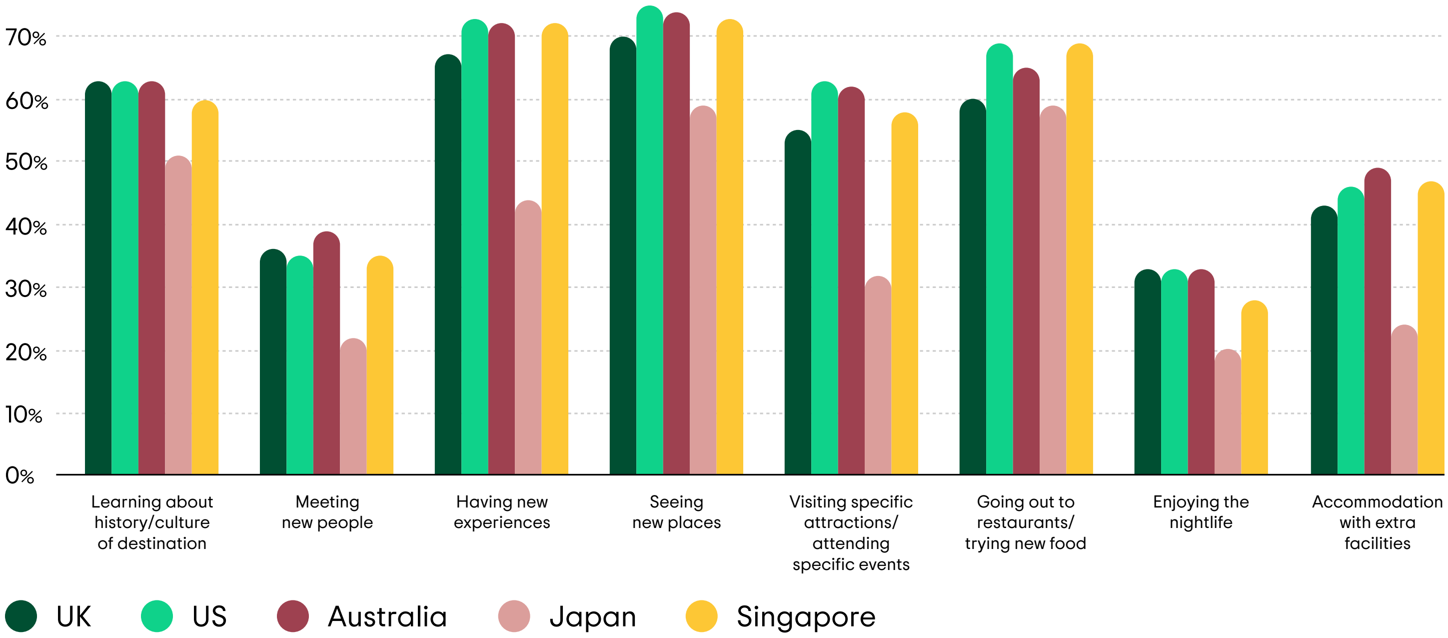
And it seems the volume of activities planned on a vacation or holiday matter.

In Australia, for example, 30% of travelers say it's **more important** now that they "pack as many activities" into their holiday travel as possible. The same holds true in the United States and UK, where 30% and 28% of travelers, respectively, say it's more important for them to plan an action-packed travel experience in 2022 or beyond.

This appetite for the "new" provides the perfect opportunity for businesses to capture a new customer

Q. When thinking about your future travel plans, to what extent do you consider each of the following to be important, or not, to you personally?

Very / Fairly Important



Base: All Adults aged 18-75 in the UK (2,199), the US (2,191), Australia (2,000), Japan (2,000), Singapore (2,000)

So, once those travelers pack their trips with something new and exciting, how will their spending on experiences trend?

In travelers' quest to level up their plans for 2022 or beyond, some are willing to spend more to get what they want.

- In the United States, roughly 3 in 10 Americans who traveled for leisure in 2019 say it's **more important** now than before the pandemic to splurge on a big trip.
- Twenty-eight percent of Singaporean and Australian travelers and 25% of UK travelers said the same.

Over a quarter of travelers in each of the five markets surveyed say it is **more important** now than before the pandemic to splurge on a big trip, but the question is: does a destination have the bookable tours and activities at the ready for them to spend that cash on?

Indeed, the destinations that can help consumers quickly find unique and interesting experiences — and experience providers who enable travelers to book their tour or gain access to their attraction with ease — could find that a slew of happy customers are ready and willing to book.

Hello, Guided Tours

According to our survey, in addition to spending time in nature and relaxing and dining out, one of the main areas where travelers seem to have an interest in 2022 is in self-guided cultural activities. On the other side of the coin, looking at guided cultural activities — those activities and tours, where subject matter experts and professional guides allow for travelers to sit back, learn, relax, and see all that an area has to offer — about 2 in 10 travelers in each of the markets surveyed said they will do more of this when planning trips in 2022 or beyond than before the pandemic (except in Japan where this proportion was 14%.).

In the UK, 20% of travelers said they plan to do more "guided cultural activities (e.g. organized tours of museums, historical landmarks, etc.)" when planning future trips in 2022 or beyond than they did before the COVID-19 pandemic, compared to 25% of travelers who said they plan to do more self-guided cultural activities (e.g. museums, galleries, etc.).

It's a similar story in the United States, where 22% of travelers said that they plan to experience more guided cultural activities than they had pre-pandemic. And 3 in 10 American travelers said that they would do more self-guided cultural activities than they did in previous years.

In Australia and Singapore, 22% and 24% of travelers, respectively, said that they would plan to do more guided cultural travel in 2022 than they did pre-pandemic.

Wine, Wellness, and Shopping

Many in our survey are also showing an interest in doing a variety of activities that may help them relax after a chaotic couple of years.

- Thirty-seven percent of American travelers in 2022 will take to the beach, compared to 33% of Australian travelers and 34% of British travelers.
- Interestingly, 38% of Singaporean travelers plan to go on shopping trips next year, compared to the least likely being 13% of Americans, 14% of Australians and 16% of Britons, respectively.
- S'mores anyone? 18% of American travelers and 17% of Australian travelers plan to go on camping or glamping trips in 2022.
- And if it's wine travelers are after, they'll be in good company: 18% each of Japanese and Singaporean travelers are planning a foodie or wine tasting trip next year, along with 14% of Australians and 12% of American travelers[2].

Not surprisingly, given how the pandemic has affected so many people across the globe, wellness trips are also a type of trip that some travelers are planning in 2022.

- Eight-percent of Australians are planning wellness retreats or spa trips, but Singaporeans are leading the way: 14% of travelers from Singapore are seeking out relaxation on a wellness retreat or spa trip next year.
- Seven-percent of travelers in the UK and Japan are heading out for a spa trip and wellness retreat next year, compared to 6% of American travelers.

[2] See appendix for full list of answers associated with this survey question.

COVID CHANGES

“COVID-19 has impacted a number of aspects of travel plans for travelers in ways that may persist for some time to come

COVID-Related Behavioral Changes

If anything is clear from the Ipsos MORI survey, it's that COVID-19 has impacted a number of aspects of travel plans for travelers in ways that may persist for some time to come.

Americans, more than people surveyed in other countries, tend to be concerned about the cost of their travel next year being too expensive. But COVID-19 restrictions and issues are also weighing into why they are not likely to travel next year.

One-third of the Americans who aren't traveling next year said they've decided against it because of uncertainty surrounding possible travel restrictions. One-quarter of respondents said they are concerned about getting COVID-19 or exposing one of their travel partners to the disease, and 20% of those who aren't traveling next year say travel restrictions could ultimately make their possible trip less enjoyable due to social distancing and hygiene (e.g. masks, hand sanitizer, etc.).

But the pandemic hasn't been all bad for the travelers in our survey. Thirty-one percent of Australian respondents said that they're now more open to exploring new travel destinations than they were prior to the pandemic. Moreover, 26% of Australian respondents said they plan to take more trips annually than they did prior to the pandemic.

In Singapore, more than 7 in 10 respondents said that when thinking about future travel plans, it's important to see new places or have new experiences. Six in ten Singaporean respondents said it's important for them to learn about their destination's culture and history — a bit more than the 51% of Japanese travelers who said the same.

7 in 10 Singaporean respondents said that when thinking about future travel plans, it's important to see new places or have new experiences

Dining & Hospitality Focus on Cleanliness

Another COVID-era behavior that may stay with travelers, especially as new variants are found, includes determining where to stay and dine based on the health and safety protocols a business or destination has in place.

And make no mistake, cleanliness can equate to traveler safety and public health.

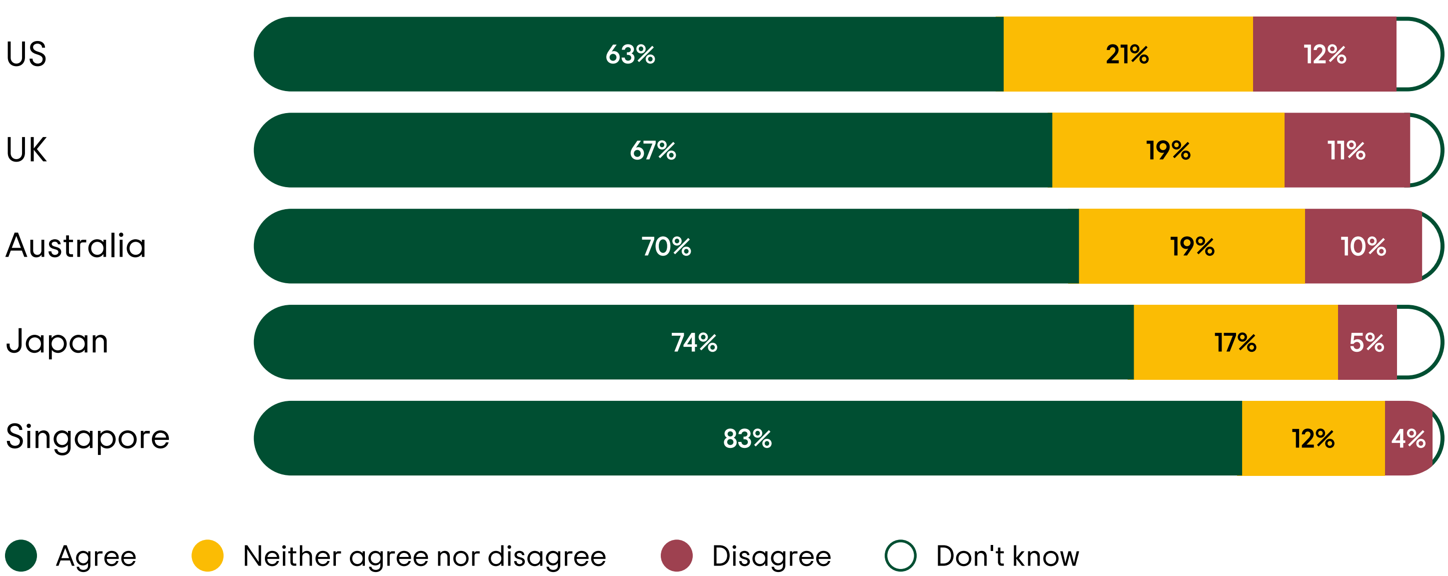
- In 2022, nearly three-quarters (73%) of Japanese travelers and 85% of Singaporean travelers agree cleanliness measures of a hospitality business will be an important factor in their travel decision making next year, even after COVID-19 cases have dropped worldwide.
- Seventy-percent of Americans who responded to Ipsos MORI's survey agree that an establishment's cleanliness will be an important factor in their travel decision making, nearly topping the 72% of British travelers who said the same.

What's more, most travelers, in the five countries surveyed, don't want to see hotels and restaurants go back to pre-pandemic health and safety policies after outbreaks are behind us.

- Sixty-three percent of Americans surveyed agree that they would like to see safety measures (e.g. hand sanitizer, perspex sneeze screens, track and trace, etc.) in place at hospitality businesses, even after COVID-19 cases have dropped worldwide.
- In Australia, 70% of respondents said they would like to see safety measures stay in place at hospitality businesses, even after COVID-19 cases have dropped worldwide, topping the 67% of Britons who had the same belief.
- Singaporeans were the most interested surveyed group in seeing safety measures stay in place, with 83% of respondents there saying safety measures should remain at hospitality businesses, even after COVID-19 cases have dropped worldwide (in Japan the proportion was 74%).

Q. To what extent do you agree, or disagree, with the following statement about the next 12 months?

I would like to see safety measures in place at hospitality businesses, even after COVID-19 cases have dropped worldwide



Base: All Adults aged 18-75 in the UK (2,199), the US (2,191), Australia (2,000), Japan (2,000), Singapore (2,000)

PLANNING & SPENDING

> Even if travelers consider spending less time away, they’re spending more as they make their plans

An Eye on Stays — and Spending

Switching gears now to look at trends we are seeing based on Tripadvisor site behavioral data, as travelers continue to adapt their opinions and preferences about the way they want to travel, they're also shifting how long they're staying in their preferred destinations.

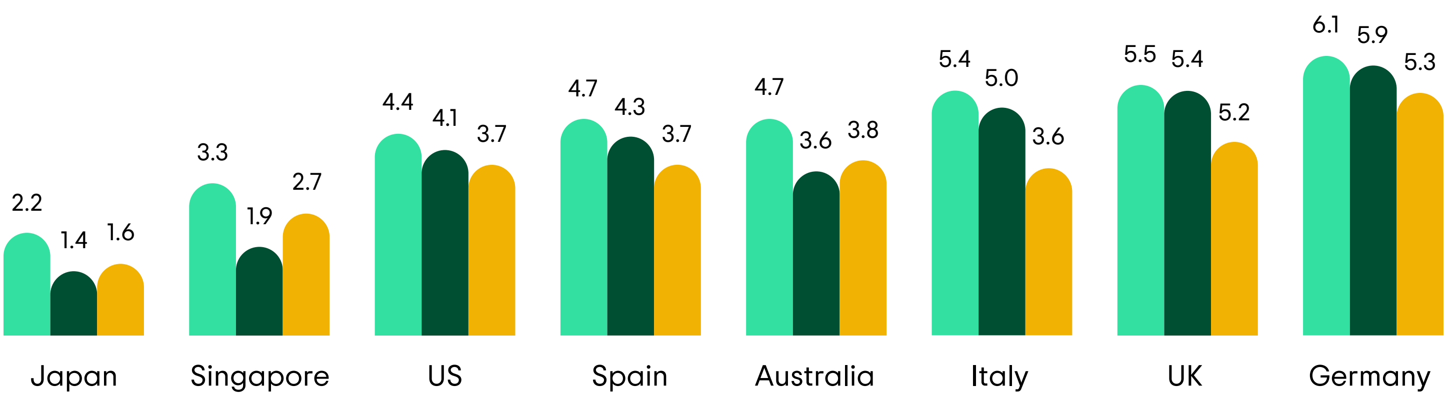
Looking ahead to next year, hotel search data on Tripadvisor shows Australians, Singaporeans and Japanese travelers are planning to stay in their desired destinations for a longer period than they had in 2020. Australians stayed in their destinations for about 3.6 days in 2020 but they plan to increase the number of days they stay away to 3.8 days next year. Singaporean travelers are opting for 2.7 days in 2022 vs 1.9 days in 2020 and while still short, Japanese travelers are upping their 2022 trip length to 1.6 days from 1.4 in 2020.

When comparing 2022 plans to pre-pandemic, across all key markets, travelers who stayed for longer periods of time in 2019 are now rethinking those lengths-of-stay in 2022. In Germany for instance, hotel searches show travelers spent an average of 6.1 days on holiday in 2019, but plan to dial it back to 5.3 days next year. Spanish travelers who spent 4.7 days away in 2019 are now saying they plan to spend 3.7 days traveling next year. In the United States, where the average American spent 4.4 days on vacation in 2019, their time away is expected to drop to 3.7 days in 2022.

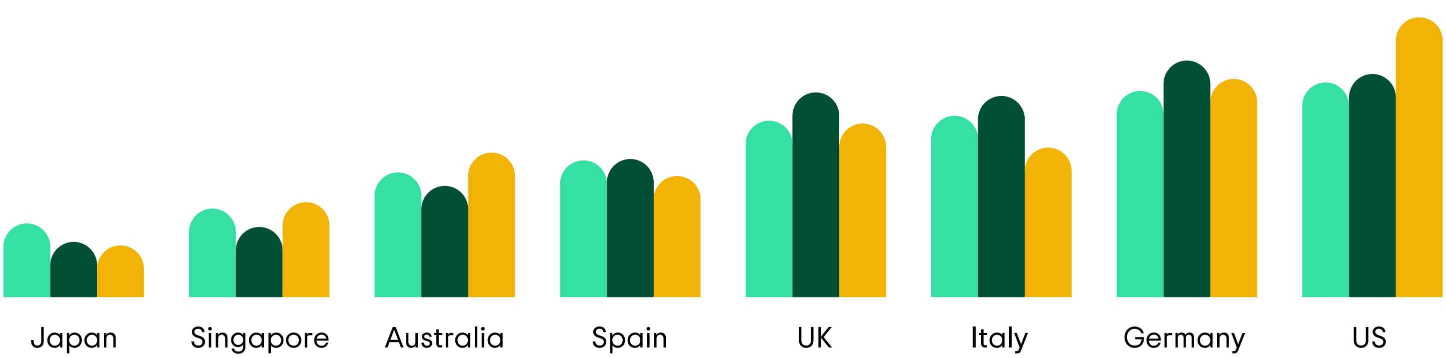
The most stark difference can be seen in the UK and Italy where Brits have gone from 5.5 days in 2019 to 4.3 days in 2022 and Italian travelers are looking at spending 3.6 days on a trip in 2022 compared with 5.4 in 2019.

Even if travelers consider spending less time away, they're spending more as they make their plans — partly because of market dynamics and inflationary costs and partly because they're seeking a more desirable travel experience.

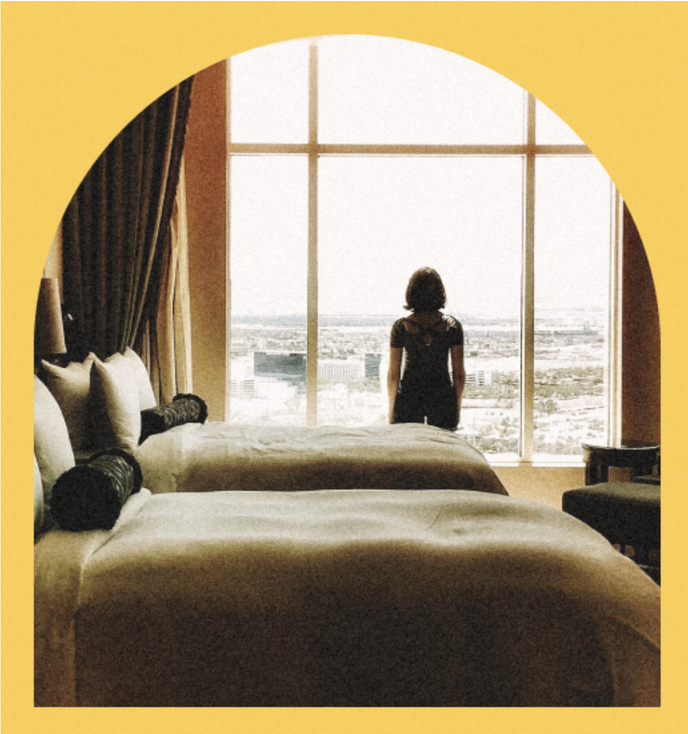
Average stay duration by market (in days)



Average booking value by market



2 years ago (Nov 2019 searches, looking at 2020 check in dates)
Last year (Nov 2020 searches, looking at 2021 check in dates)
This year (Nov 2021 searches, looking at 2022 check in dates)



According to Tripadvisor site behavioral data, in the United States, for example, American travelers are spending 29% more on their average booking in 2022 than they did in 2019. The same holds true in Australia, where average booking rates are up 16% in 2022 against 2019. German and Singaporean travelers are also finding their booking values increase by an average of 6% and 7% respectively.

As those travelers spend more, there are still others around the world who have found it easier to book less-costly travel. Nowhere is that more apparent than in Japan, where the average Japanese traveler is spending 30% less in 2022 compared with 2019. Next follows Italy — average booking spend there is down 19%.

Even in the UK, where travel is rebounding rapidly, Britons are planning to spend slightly less on 2022 travel than they did in 2019.[3]

Planning Matters

Spending time to find the right places to book matters. That was especially true in Singapore and Australia where 68% and 60% of travelers, respectively, said that taking time to research before booking is more important now when planning their trips for 2022 or beyond than before the COVID-19 pandemic.

- In Japan, nearly 4 in 10 travelers (39%) said it was more important now that they spend time researching their travel plans before booking next year or beyond, compared to pre-pandemic. Fifty-five percent of Britons and 52% of Americans said the same.

Operators should be mindful of their marketing to ensure they are reaching their target audiences, invest in turnkey booking and reservation management solutions with easy mobile-friendly payment options, especially for in-destination travelers. And focus on review collection and engagement with customers online as they manage their online information and reputation.

[3] Average spend per trip is based on actual click-throughs with intent as a proxy for spend.

SUBSCRIPTIONS

> “Travel industry subscription services help members quickly level up their travel experience

Travel Subscriptions, Cash Back Gaining Popularity

Another topic we explored in this study is the rising trend of paid subscription services across many sectors. We have Netflix for entertainment, Blue Apron for meal preparation, Spotify for music, and Amazon Prime for, well, everything. But how is this trend playing out in the travel industry?

Travel industry subscription services help members quickly level up their travel experience, get more value for their booking and save money along the way. As travelers think about the future, where they want to go, and what they want to experience, the Ipsos MORI survey looked into respondents' uptake and interest, or lack thereof, in such services.

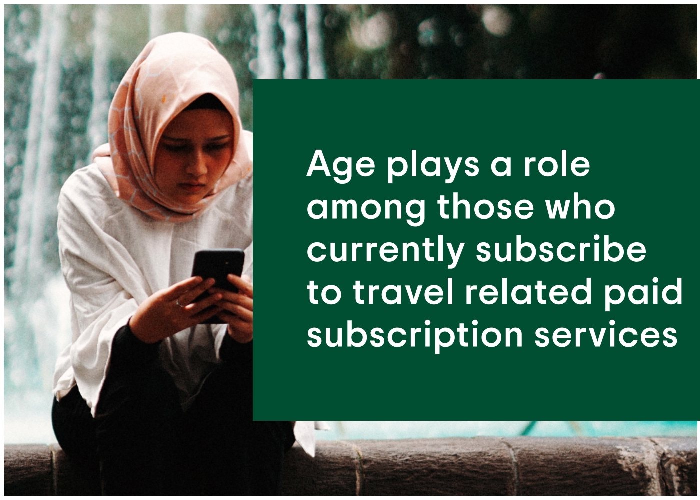
Indeed, as more companies like Tripadvisor have envisioned travel membership programs like Tripadvisor Plus that offers travelers cashback on hotel booking or experiences, extra perks, travel advice, and more for a reasonable annual fee, jetsetters around the globe seem more than willing to take advantage — and enjoy the benefits along the way.

In the United States, 17% of Americans surveyed currently subscribe to travel related paid subscription programs or services, and another 23% suggested that while they don't currently subscribe to such a service now, they would consider doing so in the future.

In the UK, more than a quarter of respondents (1 in 4) surveyed said they either currently subscribe or would consider subscribing to a travel related paid subscription service, compared to 29% of Australians. Thirty-one percent of Singaporeans would consider subscribing or currently subscribe to a travel related paid subscription service.

Survey data suggests there are also some interesting demographics at play in terms of those who currently subscribe to travel related paid subscription services. In the United States, 62% of paid travel related subscription members are male, compared to 38% of female subscribers. That's roughly consistent in other countries, including the UK, where 64% of travel related paid service subscribers are male, as well as Singapore, where 66% of travel related paid service subscribers are male. Japan has the largest proportion of female subscribers, where women make up 46% of paid travel related subscribers.

Additionally, age plays a role among those who currently subscribe to travel related paid subscription services. In the United States, just 11% of these travel subscribers are between the ages of 18 and 24, but 26% are between the ages of 25 and 34. The second-largest subscriber group in the United States, with a 25% share, is between the ages of 55 and 75, followed by people between the ages of 35 and 44 who make up 22% of the subscriber base.



Age plays a role among those who currently subscribe to travel related paid subscription services

Interestingly, the same age groups don't necessarily follow the same pattern in the UK, where 37% of paid travel related service subscribers are between the ages of 18 and 24 and 38% are between the ages of 25 and 34. The same is true in Australia, where 62% of Australian travel subscribers are between the ages of 18 and 34.

In Japan and Singapore, subscriptions to travel related paid subscription services appear to be more of a focus for older travelers. In Japan, for instance, just 6% of people between the ages of 18 and 24 subscribe to travel related paid subscription services, nearly matching the 9% of Singaporeans in the same age range who have signed up for a travel related paid subscription. In Japan, the largest proportion of subscribers at 45% are between the ages of 55 and 75. In Singapore, people between the ages of 45 and 75 make up 30% of total subscribers.

Simply having a travel related paid subscription, however, is just the tip of the iceberg for those at least considering having a travel related paid service subscription.

Regardless of where they live or how old they are, a sizable portion of respondents surveyed are willing to sign up for travel related paid subscriptions if they have the right motivation.

In the United States, 36% of respondents say that hotel or flight rate deals and special offers and discounts (e.g. automatic discounts of standard rates, etc.), would most motivate them to subscribe to a travel related paid subscription program. An equal proportion said they were most motivated by the opportunity to get cash back (e.g. get up to 15% of your hotel booking back in cash, etc.) when booking travel. Another 32% of Americans say that the benefits that would most motivate them are hotel perks and special offers (e.g. free breakfasts, guaranteed late check outs, etc.). About a quarter of American respondents said that they would be most motivated to subscribe to such subscription services when they offer travel insurance (e.g. cancel for any reason, refund for trip disruption, etc.) or free airline status upgrades (e.g. upgrade class of service such as economy to premium economy, etc.).

In the UK, more than 1 in 4 would be motivated to subscribe by hotel perks and special offers, cash back or travel insurance.

Singaporean respondents seemed to be most bullish in relation to considering signing up for a travel related paid subscription service, with higher proportions of them showing interest in a variety of perks. Forty-five percent of Singaporeans said they would be most motivated to sign up for a travel subscription service if it offers hotel or flight rate deals, special offers and discounts. Another 39% of Singaporeans are most motivated by cash back and 38% are most motivated by travel insurance. Thirty-six percent and 35% of Singaporeans would be most motivated to subscribe by the prospect of free airline status upgrades or hotel perks and special offers, respectively.

In Australia, travel related paid subscription services proved most appealing when they offered travel insurance or deals on hotels and flights, special offers and discounts. Japanese travelers were most motivated by hotel or flight deals, special offers and discounts or cash back offers.

TAKEAWAYS

> The memory of a global pandemic likely will factor into our travel decision-making for years or decades to come

Key Takeaways

It's increasingly clear that the way we once visited the world, booked hotels or tours, and dined at restaurants has changed — maybe forever and maybe for the better. The memory of a global pandemic likely will factor into our travel decision-making for years or decades to come.

In our survey of travelers, we've learned quite a bit about 2022 and the future of travel. And it's incumbent upon anyone in the hospitality industry to heed those changes and be ready to adapt to an ever-changing world.

Here's a look back at six key takeaways from Tripadvisor's outlook for 2022:

1. Prospects for a strong rebound within the hospitality industry are good, as survey responses show that in the five countries surveyed, 2022 travel intent is higher than 2019 reported travel, for both leisure and business purposes.
2. While the majority of respondents across the five countries surveyed still plan to travel in 2022, a large cohort of travelers in the countries surveyed plan to travel domestically rather than internationally.
3. The majority of travelers surveyed are seeking new and specific travel experiences in the new year.
4. If travel related paid subscription services can help them get cash back or save on flights and hotels, some travelers are willing to sign up.
5. Whilst the COVID-19 pandemic may weigh heavily on some travelers, the majority of them are choosing destinations based on case counts, safety protocols, quarantine restrictions, and cleanliness.
6. Many travelers say they don't want to see hospitality businesses end their safety measures after the pandemic wanes, suggesting mask wearing and other initiatives could be here to stay.

Methodology

The data cited in this report was gathered and analyzed from two key sources:

- A consumer sentiment survey carried out by Ipsos MORI on behalf of Tripadvisor.

  Ipsos MORI interviewed a representative quota sample of adults aged 18-75 (2,199 adults in the UK, 2,191 in the US and 2,000 in each of Australia, Japan and Singapore), using an online omnibus and ad hoc approach between November 1-16 2021.

  The sample obtained is representative of this audience of each country with quotas on age, gender, region and working status.

  The study was conducted prior to WHO designating the Omicron variant a concern.

  The data has been weighted to the known offline population proportions for age within gender, working status and region in each country in scope and for social grade in the UK and income bands in the US; to reflect the adult population of each country. Final total data has been weighted to the known offline target population proportions of those countries. The country weights have been used to ensure each country is representative of its own proportion and population in comparison with actual real proportions of the countries in scope.

  Other subsample groups reported on within this release are as follows:

  All adults aged 18-75 who traveled for leisure in 2019 (1,598 in the UK, 1,350 in the US, 1,291 in Australia, 909 in Japan and 1,625 in Singapore).

  All adults aged 18-75 who are likely to travel for leisure in 2022 (1,744 in the UK, 1,533 in the US, 1,440 in Australia, 1,008 in Japan and 1,654 in Singapore).

  All adults aged 18-75 who are unlikely to travel for leisure in 2022 (1,001 in the UK, 1,278 in the US, 1,095 in Australia, 1,457 in Japan and 854 in Singapore).

  All adults aged 18-75 who currently subscribe to any travel related paid subscription programs or services (196 in the UK, 382 in the US, 208 in Australia, 109 in Japan, 189 in Singapore).

- Site behavioral data sourced from first party traffic data on the Tripadvisor platform, gathered on 7 December, 2021, looking at eight key markets: Australia, Germany, Italy, Japan, Singapore, Spain, United Kingdom and United States.

This report is co-authored by Val Anthony, Don Reisinger, Hayley Coleman and Brian Hoyt.

Appendix

1. The Allure of Domestic Travel - This section references data based on the following survey questions and responses:
   a. **Q. Thinking back to the year before the COVID-19 pandemic started, did you travel between January and December 2019 for these reasons, or not?**
      i. Travelled abroad for leisure - 43% in the UK, 23% in the US, 35% in Australia, 12% in Japan, 66% in Singapore
      ii. Travelled within their country for leisure - 65% in the UK, 60% in the US, 58% in Australia, 44% in Japan, 67% in Singapore
      iii. Travelled abroad on a business trip - 10% in the UK, 10% in the US, 13% in Australia, 4% in Japan, 24% in Singapore
      iv. Travelled within their country on a business trip - 19% in the UK, 21% in the US, 21% in Australia, 12% in Japan, 28% in Singapore
   b. **Q. Now thinking about your plans for 2022, how likely or unlikely are you to travel for the following reasons in 2022?**
      i. Likely to travel abroad for leisure - 48% in the UK, 29% in the US, 38% in Australia, 10% in Japan, 53% in Singapore
      ii. Likely to travel within their country for leisure - 73% in the UK, 68% in the US, 68% in Australia, 50% in Japan, 74% in Singapore
      iii. Likely to travel abroad on a business trip - 11% in the UK, 14% in the US, 16% in Australia, 4% in Japan, 22% in Singapore
      iv. Likely to travel within their country on a business trip - 21% in the UK, 23% in the US, 24% in Australia, 14% in Japan, 33% in Singapore
2. Wine, Wellness and Shopping - This chart highlights the full list of answer options that were associated with the survey question referenced in this section:

Q. Still thinking about your plans to travel for leisure in 2022, what type of trip are you currently planning?

	UK	US	Australia	Japan	Singapore
Base	1744	1533	1440	1008	1654
Visiting friends / relatives	47%	55%	53%	37%	46%
Beach trip	34%	37%	33%	12%	21%
Road trip	13%	33%	32%	35%	19%
Cultural / sightseeing trip	29%	25%	26%	46%	35%
Event Travel	15%	16%	13%	15%	11%
Camping / Glamping trip	12%	18%	17%	9%	5%
Holiday Park or Village / resort trip	22%	13%	21%	11%	25%
Adventure travel	11%	18%	13%	7%	15%
Shopping trip	16%	13%	14%	18%	38%
Foodie or Wine Tasting trip	6%	12%	14%	18%	18%
Cruise	8%	11%	11%	2%	24%
Wellness Retreat / Spa trip	7%	6%	8%	7%	14%
Group tour	4%	6%	5%	4%	13%
Backpacking trip	4%	6%	4%	3%	7%
Wildlife / Safari trip	6%	5%	7%	2%	9%
Other type	4%	4%	3%	3%	1%
Don't know	6%	8%	5%	7%	6%

Base: All adults aged 18-75 who are likely to travel for leisure in 2022