TripBarometer 2017/18
Global Report
Introducing TripBarometer 2017/18
A unique global study uncovering global travel trends

Questionnaire flow

- Attitudes to travel
  - A picture of their recent trip
  - Destination choice
  - Travel spend
  - Researching, planning and booking

Key questions:
- What is important for travelers when planning their trip?
- How much do different types of traveler spend?
- What do travelers book first, and how?
- How influential is TripAdvisor throughout planning and booking the journey?
- How do different generations approach travel?

23,198 Participants
33 Markets worldwide
18 min Questionnaire
Half of users have been inspired to visit a new destination because of TripAdvisor.

Those in Asia are two to three times more likely than average to be prompted to take a trip inspired by something they saw on TripAdvisor.

Younger people are less fixed on a destination when they start thinking about a trip.

Travelers from Western nations that have experienced terror attacks recently tend to be less concerned about threats on holiday.

Asian travelers, particularly those from China, value hotel brands much more than Europeans.

Younger travelers are more cautious with their finances, with a budget of almost half what Baby Boomers typically spend. However, they are just as willing to pay more for luxury.
Contents

Setting the scene: what do we know?

How do travelers approach planning their trip?

What drives destination choice, and what is TripAdvisor’s role at this stage?

What influences accommodation choice?

How do travelers budget their trip?

What influences attraction choice?

Understanding different traveler types
Setting the scene: what do we know about TripAdvisor users?
Researching a destination and reading reviews on accommodation are entrenched behaviours.

86% of travelers will not book accommodation without reading reviews first.

89% usually do some research on a destination’s activities and restaurants before travel.

Q1. 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?
City breaks and beach holidays are the most common type of trip TripAdvisor travelers take

- Nearly one in three travelers take a city break – Millennials are 39% more likely to do so than others
- Fewer than one in ten travelers go on a cruise. Those that do are twice as likely to search for a great deal

<table>
<thead>
<tr>
<th>Trip Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>City break</td>
<td>30%</td>
</tr>
<tr>
<td>Beach</td>
<td>25%</td>
</tr>
<tr>
<td>Visiting family/friends</td>
<td>17%</td>
</tr>
<tr>
<td>Attended an event</td>
<td>10%</td>
</tr>
<tr>
<td>Group tour</td>
<td>7%</td>
</tr>
<tr>
<td>Spa holiday</td>
<td>6%</td>
</tr>
<tr>
<td>Extreme/adventure</td>
<td>6%</td>
</tr>
<tr>
<td>Cruise</td>
<td>5%</td>
</tr>
<tr>
<td>Safari</td>
<td>4%</td>
</tr>
<tr>
<td>Learning holiday</td>
<td>3%</td>
</tr>
<tr>
<td>Winter sports</td>
<td>2%</td>
</tr>
</tbody>
</table>

Millennials (Index: 139) are more likely to have City breaks. They also aim to find the right accommodation and flight combo to make this a more economical trip option.

Beachgoers* (Index: 125) are more likely than other travelers to consider all options before booking.

Travelers heading on a cruise (Index: 208) are most likely to search for a great deal before booking.

One in five (22%) travelers who go on a safari have been recommended by a friend.

*Beachgoers = those who went on a beach holiday
Popularity of the trip type differs from market to market

- Asian travelers form half, or more, of the top ranking nationalities for these trip types

Which of the following best describes your most recent trip? (Top 10 nationalities)

<table>
<thead>
<tr>
<th>City Break</th>
<th>Index</th>
<th>Beach Holiday</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain</td>
<td>56%</td>
<td>Thailand</td>
<td>39%</td>
</tr>
<tr>
<td>China</td>
<td>54%</td>
<td>Canada</td>
<td>38%</td>
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<tr>
<td>Argentina</td>
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<td>Mexico</td>
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<td>Singapore</td>
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<td>Caribbean</td>
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<td>Thailand</td>
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</tr>
<tr>
<td>Greece</td>
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<td>Brazil</td>
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<td>Japan</td>
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<td>UAE</td>
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<td>Mexico</td>
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<td>Indonesia</td>
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</table>

<table>
<thead>
<tr>
<th>Cruise</th>
<th>Index</th>
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</thead>
<tbody>
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<td>UAE</td>
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<tr>
<td>Thailand</td>
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</tr>
<tr>
<td>Argentina</td>
<td>5%</td>
</tr>
</tbody>
</table>

*Only showing countries with more than 100 completes

Q8. Which of the following best describes your most recent trip?
TripAdvisor has the biggest influence across the traveler’s journey

- Reviews on search engines are used for higher level information (inspiration and destination details) but fall in importance and influence for more specific information (accommodation and attractions)

Where did you research each of the following parts of your trip?  
Top 3 most frequently used information sources

<table>
<thead>
<tr>
<th>Percentage using each source for research of each part of trip</th>
<th>Inspiration (When deciding on destination)</th>
<th>Destination (Researching once selected destination)</th>
<th>Accommodation</th>
<th>Attractions (only asked most influential)</th>
</tr>
</thead>
<tbody>
<tr>
<td>65%</td>
<td>60%</td>
<td>55%</td>
<td>50%</td>
<td>45%</td>
</tr>
<tr>
<td>TripAdvisor</td>
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<td>43%</td>
<td>37%</td>
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</tr>
<tr>
<td>Reviews on search engine</td>
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<td>9%</td>
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<tr>
<td>OTA website</td>
<td>10%</td>
<td>12%</td>
<td>8%</td>
<td>9%</td>
</tr>
<tr>
<td>Attraction’s website</td>
<td>10%</td>
<td>12%</td>
<td>8%</td>
<td>9%</td>
</tr>
<tr>
<td>Content posted by travelers/holiday-goers</td>
<td>10%</td>
<td>12%</td>
<td>8%</td>
<td>9%</td>
</tr>
</tbody>
</table>

*Percentage in bubble and bubble size indicates the proportion of people selecting as most influential*
TripAdvisor is used to varying degrees across the markets

- Argentinians are particularly engaged with TripAdvisor, using the website the most of any nationality throughout the planning of the different components of their trip.

### Which of the following sources of information did you use for research? – TripAdvisor (Top 10 markets)

<table>
<thead>
<tr>
<th>Inspiration</th>
<th>Index</th>
<th>Destination</th>
<th>Index</th>
<th>Accommodation</th>
<th>Index</th>
<th>Attractions*</th>
<th>Index</th>
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</thead>
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<td>Argentina</td>
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<td>India</td>
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<td>US</td>
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<td>Brazil</td>
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<td>Ireland</td>
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<td>Canada</td>
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<td>Ireland</td>
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<td>Singapore</td>
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<td>India</td>
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<td>India</td>
<td>55%</td>
<td>US</td>
<td>45%</td>
<td>Portugal</td>
<td>28%</td>
</tr>
</tbody>
</table>

Q14/Q16/Q21a Which of the following sources of information did you use for inspiration/destination research/accommodation research?

*Q28 which was the most influential source when researching attractions? (Usage of attraction information sources not asked in survey)
Introducing three customer segments

• There are three key attitudinal groups of travelers which together form around 50% of TripAdvisor users
• These groups have been defined according to pairs of attitudinal statements which are highly correlated

1. **TripAdvisor Superfans**
   - 13%
   - Regularly browse TripAdvisor without a destination in mind and have been inspired by TripAdvisor to visit somewhere new*
   - Over-indexes for those from Argentina, Brazil, India and Spain
   - Average age = 49

2. **Cautious Travelers**
   - 22%
   - Destination choice may be affected by concerns over terrorism and political climate*
   - Over-indexes for those from Germany, Spain and Japan
   - Average age = 52

3. **Budget Conscious**
   - 12%
   - Have a set budget for entire trip and will use money saved on one part of a trip towards upgrading another part of the trip*
   - Over-indexes for those from Brazil, Mexico and India
   - Average age = 46

* Segment contains individuals who strongly agree with both statements
** Index calculated on those who strongly agree or tend to agree with each statement
How do travelers approach planning their trip?
TripAdvisor is a key prompt to make travelers start thinking about a trip

- Asian travelers are two to three times more likely than other travelers to be prompted by TripAdvisor
- Additionally, travelers from Asia are also more inclined to seek a great deal, which initiates their planning

**What prompted you to start thinking about your most recent trip?**

- A personal recommendation: 15%
  - Thailand (Index: 290)
  - Singapore (Index: 272)
  - Malaysia (Index: 274)
  - Indonesia (Index: 266)
- I saw a great deal in a sale: 11%
  - China (Index: 335)
  - Indonesia (Index: 266)
  - Thailand (Index: 274)
  - India (Index: 266)
  - Singapore (Index: 236)
- Browsing on TripAdvisor inspired me to visit a destination: 10%
  - Indonesia (Index: 266)
- Saw a newspaper/magazine article: 4%
- Saw advertising: 3%
Younger travelers are more open to influence on destination

- Younger travelers are more likely to begin research with a number of places in mind
- In comparison, two in three travelers +50 years old decide on a destination before researching their trip

Q12. Which of the following best describes how you started planning your trip?

- 5% Before started researching, did not know where wanted to go
- 9% Initially had destination in mind, but changed mind and visited somewhere else
- 26% Open to visiting a number of places when began researching
- 60% Decided on destination before researching trip

Traveler Age

- Open to visiting a number of places when began researching: 32% (18-24), 29% (25-34), 27% (35-49), 26% (50-64), 21% (65+)
- Decided on destination before researching trip: 46% (18-24), 52% (25-34), 57% (35-49), 62% (50-64), 70% (65+)

Younger travelers are more likely to begin research with a number of places in mind, while two in three travelers aged 50+ years old decide on a destination before researching their trip.
TripAdvisor’s influence on inspiration for destination choice is clear

- Word of mouth recommendations are one of the more influential sources of information despite being used by a relatively small proportion of travelers.

Q14. Which of the following sources of information did you use for inspiration when you were considering which destination to visit?

Q14b. And which was the most influential source when searching for inspiration?
Many travelers regularly engage with TripAdvisor even when they’re not planning a specific trip

- Argentinian travelers are the most likely to regularly browse without a specific trip in mind, while Asian travelers are the least likely
- 73% of those in the “Budget Conscious” segment browse with no trip in mind

### What is important for you when traveling? (% agree)

<table>
<thead>
<tr>
<th>Nationality (top 10)</th>
<th>Index</th>
<th>Nationality (bottom 10)</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Argentina</td>
<td>77%</td>
<td>Switzerland</td>
<td>60%</td>
</tr>
<tr>
<td>Spain</td>
<td>76%</td>
<td>China</td>
<td>58%</td>
</tr>
<tr>
<td>Caribbean</td>
<td>75%</td>
<td>USA</td>
<td>57%</td>
</tr>
<tr>
<td>Brazil</td>
<td>73%</td>
<td>Thailand</td>
<td>57%</td>
</tr>
<tr>
<td>Japan</td>
<td>72%</td>
<td>Austria</td>
<td>56%</td>
</tr>
<tr>
<td>Portugal</td>
<td>71%</td>
<td>Singapore</td>
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<td>Ireland</td>
<td>69%</td>
<td>UAE</td>
<td>48%</td>
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<td>Italy</td>
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</tr>
<tr>
<td>Mexico</td>
<td>68%</td>
<td>Malaysia</td>
<td>44%</td>
</tr>
<tr>
<td>India</td>
<td>66%</td>
<td>Indonesia</td>
<td>35%</td>
</tr>
</tbody>
</table>

Q1. 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?
Thinking about the order in which you booked your last trip, which of the following best applies to you?

- Arranging transport to destination was the first thing I did (29%)
  - Solo travelers* (Index: 140) are more likely to arrange transport first

- Carefully compared all options to find the best option overall (27%)
  - Budget Conscious travelers (Index: 151)

- Researched and booked accommodation first (22%)

- Saw a great deal and booked it quickly (11%)
  - Cruisers** (Index: 208) and Group travelers*** (Index: 190) are the most likely to book a great deal
  - One in five Superfans (Index: 181) are also keen to find deals

- Not involved in making bookings for my trip (11%)

Q17. Thinking about the order in which you booked your last trip, which of the following best applies to you?

*Solo travelers = those who went on their trip alone
**Cruisers = those who went on a cruise
***Group travelers = those who described their trip type as a “group travel tour”
Travelers who consider all options are primarily from emerging markets

- Chinese, Brazilian, and Malaysian travelers are keen to find the best options for their trip
- Argentine and Swiss travelers are much more likely than the others to arrange transportation first

Thinking about the order in which you booked your last trip, which of the following best applies to you?

<table>
<thead>
<tr>
<th>Country</th>
<th>Arranging transport to destination was first thing done</th>
<th>Carefully compared all transport / accommodation options</th>
<th>Research and booked accommodation first</th>
<th>Saw a great deal and booked it quickly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Argentina</td>
<td>41%</td>
<td>45%</td>
<td>32%</td>
<td>17%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>40%</td>
<td>41%</td>
<td>30%</td>
<td>16%</td>
</tr>
<tr>
<td>Ireland</td>
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<td>Japan</td>
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<tr>
<td>UK</td>
<td>27%</td>
<td>30%</td>
<td>21%</td>
<td>12%</td>
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<tr>
<td>Spain</td>
<td>27%</td>
<td>29%</td>
<td>20%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Q17. Thinking about the order in which you booked your last trip, which of the following best applies to you?
What drives destination choice?
Travelers are keen to visit new destinations and are more likely to seek new cultures and experiences as opposed to great weather

- Behaviour reflects these claims, over a third choose their destination to experience the culture/society/people, compared to one fifth of travelers who are looking for good weather

What is important for you when traveling? (% agree)

- **89%**
  - “Love to travel to see new places and cultures never experienced before”

- **57%**
  - “I care more about local history and culture than weather when traveling”

- **31%**
  - “The perfect trip is spending it on a warm, sunny beach”

Q1. 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?
Travelers prefer visiting multiple locations but also have a need for relaxation and calm during their vacation

- Seeking adventure does not necessarily mean traveling independently away from tourist attractions, just 13% chose a destination because it was off the beaten track

What is important for you when traveling? (% agree)

- 52% “A trip seeing multiple destinations is better than staying in one place”
- 39% “My vacations are usually more about excitement and fun than relaxation and calm”

Q1. 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?
Younger travelers are more likely to want excitement and fun when traveling

- Older travelers are much more inclined to have a relaxing trip

What is important for you when traveling? – My vacations are usually more about excitement and fun than relaxation and calm

Q1. 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?

“My vacations are usually more about excitement and fun than relaxation and calm”

- 18 - 24: 59%
- 25 - 34: 55%
- 35 - 49: 42%
- 50 - 64: 33%
- 65+: 29%

Overall agreement (39%)
Asian travelers prefer to visit multiple locations and prefer excitement and fun over relaxation and calm

- European and North American travelers do not feature in the top 10 for any of these statements, though Spaniards and Italians are some of the most likely to prefer local history and culture over weather

What is important for you when traveling?
(% agreeing with each statement) Top 10 nationalities

<table>
<thead>
<tr>
<th>Index</th>
<th>&quot;I care more about local &quot;history and culture than weather when traveling&quot;</th>
<th>&quot;A trip seeing multiple destinations is better than staying in one place&quot;</th>
<th>&quot;My vacations are usually more about excitement and fun than relaxation and calm&quot;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain</td>
<td>68%</td>
<td>85%</td>
<td>64%</td>
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<td>Brazil</td>
<td>64%</td>
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<td>Australia</td>
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<td>70%</td>
<td>60%</td>
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<td>Italy</td>
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<td>Thailand</td>
<td>61%</td>
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<td>44%</td>
</tr>
</tbody>
</table>

Q1. 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? *Only showing countries with more than 100 completes*
Travelers from cooler climates such as Northern Europe are the most likely to seek good weather

- Travelers to the Caribbean and Mexico are twice as likely to visit for the weather

What were the main reasons for choosing where you went on your last trip? – “For the weather”

<table>
<thead>
<tr>
<th>Nationality</th>
<th>Index</th>
<th>Destination</th>
<th>Index</th>
</tr>
</thead>
<tbody>
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<td>Canada</td>
<td>30%</td>
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<td>Thailand</td>
<td>21%</td>
<td>Spain</td>
<td>34%</td>
</tr>
<tr>
<td>Brazil</td>
<td>20%</td>
<td>Maldives</td>
<td>30%</td>
</tr>
<tr>
<td>Japan</td>
<td>20%</td>
<td>Portugal</td>
<td>25%</td>
</tr>
<tr>
<td>Argentina</td>
<td>19%</td>
<td>Thailand</td>
<td>25%</td>
</tr>
</tbody>
</table>

Q15. What were the main reasons for choosing where you went on your last trip? – All who selected “the weather” – the left hand chart shows results according to traveler’s nationality while the right hand chart shows results according to the traveler’s destination.
Culture is a key factor for travelers on a variety of trips

- Travelers on learning holidays and group tours are the most likely to be lured to a destination for the culture
- Culture also draws in 2 in 5 travelers on cruises, city breaks and safari tours

What were the main reasons for choosing where you went on your last trip? – “To experience the culture” (trip type)
Concerns about terrorism remain high among all age groups, while concerns about the political climate rise sharply with age

- Terrorism is more of a concern among younger travelers but for those aged 50+ the political climate of the destination has near equal importance

What is important for you when traveling?

**% agreeing with each statement (All Travelers)**

- “Concerns about terrorism may affect my choice of destination”: 73%
- “The political climate of my preferred destination may influence my travel plans”: 68%

**% agreeing with each statement (Age group)**

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Terrorism</th>
<th>Political Climate</th>
</tr>
</thead>
<tbody>
<tr>
<td>18 - 24</td>
<td>67%</td>
<td>54%</td>
</tr>
<tr>
<td>25 - 34</td>
<td>68%</td>
<td>57%</td>
</tr>
<tr>
<td>35 - 49</td>
<td>74%</td>
<td>66%</td>
</tr>
<tr>
<td>50 - 64</td>
<td>75%</td>
<td>73%</td>
</tr>
<tr>
<td>65+</td>
<td>72%</td>
<td>71%</td>
</tr>
</tbody>
</table>

Q1. 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?
Q1. 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? *Only showing countries with more than 100 completes*

<table>
<thead>
<tr>
<th>Index</th>
<th>Portugal</th>
<th>Singapore</th>
<th>Malaysia</th>
<th>Japan</th>
<th>China</th>
<th>Brazil</th>
<th>Switzerland</th>
<th>Spain</th>
<th>Caribbean</th>
<th>India</th>
<th>UAE</th>
<th>Thailand</th>
<th>France</th>
<th>Canada</th>
<th>USA</th>
<th>Ireland</th>
<th>Australia</th>
<th>UK</th>
<th>Germany</th>
<th>Mexico</th>
<th>Argentina</th>
<th>Italy</th>
<th>Indonesia</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>117</td>
<td>114</td>
<td>114</td>
<td>113</td>
<td>111</td>
<td>110</td>
<td>109</td>
<td>109</td>
<td>107</td>
<td>103</td>
<td>99</td>
<td>96</td>
<td>96</td>
<td>96</td>
<td>95</td>
<td>94</td>
<td>92</td>
<td>94</td>
<td>92</td>
<td>69</td>
<td>68</td>
<td>86</td>
<td>60%</td>
</tr>
</tbody>
</table>

*Travelers are almost equally concerned about terrorism*

- Indonesians are the least likely to have terrorism concerns about their destination
Nationalities concerned about terrorism also tend to have concerns about the political climate of their destination

- Japanese, Portuguese, and German travelers express greater concern over the political climate at destinations than other travelers

What is important for you when traveling? – “The political climate of my preferred destination may influence my travel plans”

Q1. 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? *Only showing countries with more than 100 completes
TripAdvisor is the main source of information once travelers select their destination

- TripAdvisor is especially well used by those visiting Greece (65%), Singapore (65%) and Mexico (64%)

Q16. Once you had decided on your destination, which of the following sources of information did you use to research your destination?

Q16b. And which was the most influential source of information when researching your destination?

Superfans (Index: 123) used TripAdvisor and it was most influential for 61% of these travelers
Destination choice and the role of TripAdvisor
One in every two TripAdvisor users have been inspired to visit a new destination by TripAdvisor.

49% Of travelers say TripAdvisor has inspired them to visit a destination they had not previously thought of.
One in ten travelers originally had a destination in mind but changed their mind

- Inspiration from TripAdvisor is among the key reasons for travelers to change their destination

Which of the following best describes you?

- **Decided destination before starting research**: 60%
- **Open to several destinations when starting research**: 26%
- **Had a destination in mind, but changed mind during research**: 9%
- **Before starting research had no destination in mind**: 5%

Why did you change your destination after starting research?

- **I found a better deal**: 35%
- **Availability of accommodation or transport**: 29%
- **Something I saw on TripAdvisor**: 21%
- **Something I saw on other travel websites**: 16%
- **Weather**: 14%
- **My budget changed**: 14%
- **The political situation**: 8%
- **Something else I saw in the news**: 9%
TripAdvisor is an inspiration to travelers who can spend more and also travelers looking for cheaper alternatives

- TripAdvisor inspires three in five travelers who are likely to change their destination due to a cheaper flight and also the same proportion of travelers who prefer staying at a trusted hotel.
- Just over half of travelers who are prepared to pay more for luxury are inspired by TripAdvisor to visit a destination they hadn’t thought of.

What is important for you when traveling? (% agree)

- “I’m likely to choose a different destination than originally planned if I find a cheaper flight” – 60% agree
- “It’s important I stay with known and trusted hotels brands” – 57% agree
- “I’m prepared to pay a little more to ensure a luxury trip” – 53% agree

Q1. 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?

“TripAdvisor has inspired me to visit a destination I had not previously thought of” – 49% agree
What influences accommodation choice?
Hotel usage is high in Asia – the top 3 destinations are found there

- Where hotel use is low, resorts – the next most frequent accommodation option – are popular

Q9. Which of the following best describes your accommodation type?

- Hotel: 53%
- Resort: 10%
- Holiday rental or apartment: 8%
- Accom. arranged through home-sharing website or app: 7%
- Bed & Breakfast: 5%
- Motel: 3%
- Hostel: 2%
- Inn: 2%
- Campsite: 2%

UAE (Index: 135), Taiwan (Index: 133) and China (Index: 127) had the highest proportion of visitors staying in hotels.

Resorts in Mexico and the Caribbean (both Index: 399) have higher proportions of travelers than Hotels do.
TripAdvisor is the most influential source of information when researching accommodation

- Online travel agent, search engine reviews and official hotel ratings are also influential to travelers when researching accommodation

Which sources did you use to research your accommodation, and which was most influential?

- **TripAdvisor**: Used by 44%, Most Influential by 37%
- **Online travel agent / tour operator websites**: Used by 26%, Most Influential by 19%
- **Reviews on a search engine**: Used by 9%, Most Influential by 21%
- **Content posted by travelers**: Used by 13%, Most Influential by 4%
- **Private accommodation / house swap listing**: Used by 11%, Most Influential by 3%
- **Official hotel ratings score**: Used by 11%, Most Influential by 7%

Q16. Once you had decided on your destination, which of the following sources of information did you use to research your destination?
Q16b. And which was the most influential source of information when researching your destination?
Travelers staying in resorts are particularly reliant on TripAdvisor when researching accommodation

- TripAdvisor is most influential among UK and Irish travelers when researching accommodation, but less influential in Asian markets

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>TripAdvisor was most influential</th>
<th>Another information source was most influential*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resort</td>
<td>12%</td>
<td>43%</td>
</tr>
<tr>
<td>Hotel</td>
<td>22%</td>
<td>42%</td>
</tr>
<tr>
<td>B&amp;B</td>
<td>17%</td>
<td>37%</td>
</tr>
<tr>
<td>Motel</td>
<td>17%</td>
<td>35%</td>
</tr>
<tr>
<td>Hostel</td>
<td>17%</td>
<td>34%</td>
</tr>
<tr>
<td>Inn</td>
<td>17%</td>
<td>32%</td>
</tr>
<tr>
<td>Holiday rental or apartment</td>
<td>24%</td>
<td>27%</td>
</tr>
<tr>
<td>Campsite/caravan park</td>
<td>17%</td>
<td>27%</td>
</tr>
<tr>
<td>Home-sharing website or app</td>
<td>14%</td>
<td>59%</td>
</tr>
</tbody>
</table>

* Other than TripAdvisor, OTAs are the most influential source of accommodation research for travelers. The exceptions are for those staying at:
  - Campsite: Where reviews on a search engine are the second most frequently used
  - Home-sharing: Where Airbnb, Flipkey, Homeaway etc are the most influential source
TripAdvisor is the most influential source when researching accommodations for beach holidays, city breaks and cruises

- OTAs were the next most influential source, particularly among city break travelers

What was the most influential source when researching accommodation?

<table>
<thead>
<tr>
<th>Source</th>
<th>Beach holiday</th>
<th>City break</th>
<th>Cruise</th>
</tr>
</thead>
<tbody>
<tr>
<td>TripAdvisor</td>
<td>41%</td>
<td>36%</td>
<td>35%</td>
</tr>
<tr>
<td>Online travel agent</td>
<td>18%</td>
<td>26%</td>
<td>15%</td>
</tr>
<tr>
<td>Reviews on a search engine</td>
<td>7%</td>
<td>8%</td>
<td>11%</td>
</tr>
<tr>
<td>Private accommodation</td>
<td>7%</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>Content posted by travelers</td>
<td>5%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Travel agent</td>
<td>4%</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Word of mouth</td>
<td>3%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Official hotel ratings score</td>
<td>3%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Content posted by businesses</td>
<td>2%</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Travel guide websites</td>
<td>2%</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Online advertisements</td>
<td>2%</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Official hotel ratings score</td>
<td>3%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Content posted by businesses</td>
<td>2%</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Travel agent</td>
<td>2%</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Online advertisements</td>
<td>2%</td>
<td>2%</td>
<td></td>
</tr>
</tbody>
</table>

Q21b. Which source was most influential when researching accommodation?
Families are more likely to prefer a hotel with a brand they trust

- People traveling as a group with other families are particularly likely to value hotel brands - half say that they are important to them

What is important for you when traveling? – “It's important that I stay in hotels with a brand name I know and trust”

Q1. 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?
Asian travelers, especially those from China, value hotel brands much more than Europeans

- British travelers pay the least importance to hotel brands

![Bar chart showing the importance of hotel brands among travelers from various countries.](chart.png)

Q1. 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?

- “It’s important that I stay in hotels with a brand name I know and trust”

According to the survey, 39% of travelers find this statement important.
OTAs remain the most popular place to book accommodation

- One in ten ‘Superfans’ book their accommodation through TripAdvisor

Which of the following did you use to book your accommodation for your most recent trip?

- OTA: 26%
- Accommodation’s own website: 14%
- TripAdvisor’s website: 7%
- Home sharing website or app: 7%
- Directly on an online search engine: 7%
- Travel agent’s shop/branch: 4%
- Called accommodation/travel provider: 4%
- Mobile app of the accommodation: 2%
- Mobile app of other travel websites: 2%
- Other online travel providers: 2%
- TripAdvisor mobile app: 1%
- Booked accommodation upon arrival: 1%
- Telephone call to travel agencies: 1%

TripAdvisor Superfans = Index: 184
How do travelers budget their trip?
The vast majority of travelers try to find the best deal possible and three in five have a set budget

- However, only a third would change destination if they found a cheaper flight

What is important for you when traveling? (% agree)

- 87%: “Enjoy trying to find the best possible deal when planning trip”
- 62%: “When going on holiday, I have a set budget for the entirety of my trip”
- 32%: “I’m likely to choose a different destination than originally planned if I find a cheaper flight”

Q1. 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?
Travelers from emerging markets are among the most likely to have a set budget

- Brazilians are most likely to have a fixed budget and are particularly keen to find good deals

Top 10 markets for each statement (percentage agree)

Q1. 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?
Sociocultural and emotional factors dominate the top reasons why travelers selected their destination

- Cost also influenced the destination of 6 in 10 travelers overall, while the price of accommodation was the third most frequently cited reason for choosing a destination

What were the main reasons for choosing where you went on your last trip? (Top 10)

- To experience the culture/society/people there: 34%
- It was recommended by a friend/relative: 13%
- I have family ties or a family home there: 11%
- For the weather: 20%
- It was family-friendly: 16%
- It was off the beaten track: 13%
- I/we go there every year: 11%
- It was great for my age group: 11%
- The hotel/accommodation had a good price: 19%
- It was a cheap holiday/vacation option: 10%

Main reasons for choosing destination (net)

- Social/cultural reasons (NET): 65%
- Emotional reasons (NET): 62%
- Financial reasons (NET): 60%

Q15. What were the main reasons for choosing where you went on your last trip?
Younger travelers are more cautious with their finances, but just as willing to pay for luxury as other age groups

- By contrast, Baby Boomers are least likely to have a set budget or to pay close attention to the exchange rate

What is important for you when traveling? (% agree with each statement, by generation)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Overall</th>
<th>Millennials</th>
<th>Gen X</th>
<th>Baby Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;I pay close attention to the local exchange rate when deciding where to travel&quot;</td>
<td>37%</td>
<td>46%</td>
<td>37%</td>
<td>34%</td>
</tr>
<tr>
<td>&quot;I'm prepared to pay a little more to ensure I have a luxury trip&quot;</td>
<td>56%</td>
<td>54%</td>
<td>57%</td>
<td>56%</td>
</tr>
<tr>
<td>&quot;When going on holiday, I have a set budget for the entirety of my trip&quot;</td>
<td>62%</td>
<td>70%</td>
<td>66%</td>
<td>55%</td>
</tr>
</tbody>
</table>

Q1. 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?
Younger travelers are more likely to be prompted by a great deal

- The 25-34 age group is more likely to be attracted to a great deal – however, this declines with age

Q11. What prompted you to start thinking about your most recent trip?

What prompted you to start thinking about your most recent trip? – “I saw a great deal in a sale”
Accommodation takes up the biggest part of travelers’ budgets but those from emerging markets spend less on this

- Australians spend nine times more than Thais

How much did you spend on accommodation? (USD)

Q25. Please give us your best estimate of how much you think you spent on the different elements of your trip. How much did you spend on…

Only showing countries with more than 100 completes
Price aside, decisions on flights were due to logistic convenience

- Younger travelers are more likely than others to select price as the key reason to flight decision

**Staying with your most recent trip, what were the main reasons you choose your flights?**

- It had a good price: 24%
- The airline fly from the airport I wanted to depart from: 12%
- The airline fly to the airport I wanted to fly to: 12%
- It was the best route available: 11%
- The time of departure was suitable: 11%
- I wanted to fly with my preferred airline: 9%
- There was a special offer: 8%
- I had air miles to use: 5%
- I wanted to earn air miles: 2%
- The airline was recommended to me: 2%
- I saw positive reviews of the airline: 2%
- I wanted to try the airline: 2%

**Percentage selecting ‘It had a good price’ by age**

- 18 - 24: 32%
- 25 - 34: 32%
- 35 - 49: 27%
- 50 - 64: 21%
- 65+: 16%

Q20. Staying with your most recent trip, what were the main reasons you choose your flights?
Millennials have the smallest budgets and spend less than half of what Baby Boomers spend on accommodation

- Travelers with close family and children under 18 spend ~60% more than other travelers on attractions ($271) and 30% more on shopping ($311)

How much did you spend on the different elements of your trip? (USD)

<table>
<thead>
<tr>
<th>Total population</th>
<th>Accommodation</th>
<th>Transport to get there</th>
<th>Restaurants</th>
<th>Transport while there</th>
<th>Attractions</th>
<th>Shopping</th>
</tr>
</thead>
<tbody>
<tr>
<td>$925</td>
<td>$587</td>
<td>$330</td>
<td>$185</td>
<td>$168</td>
<td>$242</td>
<td></td>
</tr>
<tr>
<td>$1,642</td>
<td>$498</td>
<td>$365</td>
<td>$224</td>
<td>$176</td>
<td>$170</td>
<td>$209</td>
</tr>
<tr>
<td>$2,387</td>
<td>$867</td>
<td>$592</td>
<td>$324</td>
<td>$158</td>
<td>$170</td>
<td>$276</td>
</tr>
<tr>
<td>$2,783</td>
<td>$1,136</td>
<td>$668</td>
<td>$375</td>
<td>$210</td>
<td>$167</td>
<td>$227</td>
</tr>
</tbody>
</table>

Q25. Please give us your best estimate of how much you think you spent on the different elements of your trip. How much did you spend on…
Travelers spend the most on cruises, but less on city breaks

- Those on a beach holiday spent the most on accommodation of any trip type (excluding cruises)
- Travelers on a winter sports trip spent the most on shopping at their destination

How much did you spend on the different elements of your trip? (USD)

<table>
<thead>
<tr>
<th>Element</th>
<th>Cruise</th>
<th>Safari/wildlife tour</th>
<th>Learning holiday</th>
<th>Beach holiday</th>
<th>Winter sports</th>
<th>Extreme or adventure</th>
<th>Group travel tour</th>
<th>Spa holiday</th>
<th>Business only</th>
<th>Visiting family/friends</th>
<th>City break</th>
<th>Attended an event</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shopping</td>
<td>$3,985</td>
<td>$3,387</td>
<td>$3,337</td>
<td>$2,829</td>
<td>$2,687</td>
<td>$2,601</td>
<td>$2,361</td>
<td>$2,237</td>
<td>$2,209</td>
<td>$2,050</td>
<td>$2,023</td>
<td></td>
</tr>
<tr>
<td>Restaurants</td>
<td>$370</td>
<td>$301</td>
<td>$309</td>
<td>$243</td>
<td>$256</td>
<td>$262</td>
<td>$259</td>
<td>$241</td>
<td>$249</td>
<td>$256</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attractions</td>
<td>$307</td>
<td>$412</td>
<td>$477</td>
<td>$356</td>
<td>$349</td>
<td>$305</td>
<td>$273</td>
<td>$274</td>
<td>$341</td>
<td>$317</td>
<td>$313</td>
<td></td>
</tr>
<tr>
<td>Transport to destination</td>
<td>$324</td>
<td>$362</td>
<td>$305</td>
<td>$184</td>
<td>$248</td>
<td>$247</td>
<td>$177</td>
<td>$120</td>
<td>$145</td>
<td>$148</td>
<td>$214</td>
<td></td>
</tr>
<tr>
<td>Transport at destination</td>
<td>$381</td>
<td>$339</td>
<td>$529</td>
<td>$170</td>
<td>$245</td>
<td>$304</td>
<td>$256</td>
<td>$168</td>
<td>$215</td>
<td>$145</td>
<td>$163</td>
<td></td>
</tr>
<tr>
<td>Accommodation</td>
<td>$781</td>
<td>$910</td>
<td>$747</td>
<td>$620</td>
<td>$312</td>
<td>$231</td>
<td>$658</td>
<td>$432</td>
<td>$709</td>
<td>$624</td>
<td>$531</td>
<td>$466</td>
</tr>
<tr>
<td></td>
<td>$1,821</td>
<td>$1,064</td>
<td>$970</td>
<td>$1,257</td>
<td>$935</td>
<td>$932</td>
<td>$866</td>
<td>$931</td>
<td>$708</td>
<td>$644</td>
<td>$660</td>
<td>$611</td>
</tr>
</tbody>
</table>

Q25. Please give us your best estimate of how much you think you spent on the different elements of your trip. How much did you spend on…
What influences attraction choice?
Of those that pre-book attractions, only a minority of those do so before their trip

- Millennials are more likely to book attractions than older travelers

Q29. Did you pre-book any of the attractions that you researched?

- Can't remember: 29%
- No: 57%
- Yes, before I arrived at the destination: 29%
- Yes, while on the trip: 10%

Budget Conscious travelers are the most likely to pre-book attractions prior to travel (Index: 130)

Thais (Index: 233) and Chinese (Index: 220) are the most likely to pre-book attraction prior to travel. Germans (Index: 54) and Austrians (Index: 51) are less likely to book ahead

Percentage pre-booking attractions:

- Millennials: 49%
- Gen X: 40%
- Baby Boomers: 35%
TripAdvisor is the most influential source of research for attractions

- However, nearly a quarter do not do any research on attractions at all. This may provide an opportunity for TripAdvisor to emphasise the help it can provide travelers on this topic.

![Bar chart showing the most influential source for research on attractions]

Q28. Which was the most influential source when searching attractions?

- TripAdvisor: 27%
- The attraction’s own website: 10%
- Content posted by travelers: 6%
- Travel guide books/brochures: 5%
- Travel guide websites: 4%
- None - I didn't research attractions: 24%

Superfans are more likely to have found TripAdvisor to be influential when researching attractions (Index: 158)
Business travelers
Business travelers are predominantly male and are older than leisure travelers

- Younger age groups contain a higher proportion of women

Thinking of your most recent trip of at least two nights, was it a business or leisure trip?

Q2. Thinking of your most recent trip of at least two nights, was it a business or leisure trip?
The majority of business travel is domestic, while leisure travel tends to be international

- 41% of business trips are solo compared with just 11% of leisure trips

**Was your most recent trip of at least two nights international or domestic?**

- **Business travelers**
  - 8% International trip
  - 52% Domestic trip

- **Leisure travelers**
  - 3% International trip
  - 97% Domestic trip

**Staying with your most recent trip, who did you go with?**

- **Alone** 41%
- **With colleagues** 35%
- **Spouse/partner** 15%
- **Spouse/partner** 57%
- **With friends** 16%
- **Close family** 16%
Business travelers are often able to choose accommodation

- Business travelers are more likely than leisure travelers to prioritise hotel brand

Which of the following elements did you personally choose for your last business trip?

- Accommodation: 53%
- Flights: 44%
- Destination: 27%
- Attractions: 20%
- None of the above: 20%

“It’s important that I stay in hotels with a brand name I know and trust” (% agreeing)

- Business: 47%, Index 120
- Leisure: 37%, Index 94

Q10. Which of the following elements did you personally choose for your last business trip?
Combining business and leisure travel
Those who are able to combine business and leisure are using the opportunity to visit family or friends, or attend events

- Business travelers who can combine some leisure activities are comparatively more likely to visit family/friends or attend an event, compared with leisure-only travelers

Q8. Which of the following best describes your most recent trip?

<table>
<thead>
<tr>
<th>Category</th>
<th>Leisure</th>
<th>Business &amp; Leisure</th>
</tr>
</thead>
<tbody>
<tr>
<td>City break</td>
<td>17%</td>
<td>30%</td>
</tr>
<tr>
<td>Visiting family/friends</td>
<td>9%</td>
<td>24%</td>
</tr>
<tr>
<td>Attended an event</td>
<td>9%</td>
<td>23%</td>
</tr>
<tr>
<td>Beach holiday</td>
<td>7%</td>
<td>19%</td>
</tr>
<tr>
<td>Group tour travel</td>
<td>2%</td>
<td>14%</td>
</tr>
<tr>
<td>A learning holiday</td>
<td>2%</td>
<td>9%</td>
</tr>
</tbody>
</table>

(Traveler type)
Travelers who combine a business and leisure trip on average visit more countries

- Leisure travelers are more likely to travel with spouse/partner

Average number of countries visited on last trip, by travel purpose

1.7 countries
Business & Leisure

1.3 countries
Leisure

1.3 countries
Business

Travel companions

- Spouse/partner
  - Leisure: 41%
  - Business & Leisure: 57%

- On my own
  - Leisure: 21%
  - Business & Leisure: 11%

- Friends
  - Leisure: 19%
  - Business & Leisure: 16%

- With colleagues
  - Leisure: 18%
  - Business & Leisure: 1%

- Close family (with children)
  - Leisure: 14%
  - Business & Leisure: 16%

Q4. Which country/countries did you visit for at least two nights during your most recent trip? Q6. Staying with your most recent trip, who did you go with?
Those combining business and leisure spend less on accommodation but more on transportation and shopping at their destination

- There is little difference in average dining spends

Average spend on trip elements (amounts in US$)

<table>
<thead>
<tr>
<th>Service</th>
<th>Leisure</th>
<th>Business &amp; Leisure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transport to destination</td>
<td>$582</td>
<td>$523</td>
</tr>
<tr>
<td>Accommodation</td>
<td>$709</td>
<td>$965</td>
</tr>
<tr>
<td>Restaurants &amp; dining</td>
<td>$337</td>
<td>$317</td>
</tr>
<tr>
<td>Shopping at destination</td>
<td>$233</td>
<td>$327</td>
</tr>
<tr>
<td>Transportation at destination</td>
<td>$174</td>
<td>$314</td>
</tr>
</tbody>
</table>

46% of business and leisure travelers purchased an upgrade during their trip, compared to 29% of leisure only travelers

Q25. Please give us your best estimate of how much you think you spent on the different elements of your trip. How much did you spend on…
Traveler types
Introduction to our 3 main Traveler Types

• City breaks and beach holidays were the two most common trip types among TripAdvisor users. Cruise is of particular interest to TripAdvisor and has been included in this section.

City Travelers

• 30% of TripAdvisor users take city breaks. While Millennials are more likely than other age-groups to take a city break, 62% of City Travelers are +35 years old.

• Just over half of City Travelers use TripAdvisor for inspiration when considering a destination. This proportion rises when it comes to researching their chosen destination.

• City Travelers are more likely than others to look for destinations where they can enjoy the history / culture and also have some excitement and fun too. On average they spend $660 on their accommodation and are more likely to carry cash for transportation when in location and visiting attractions.

Beachgoers

• One quarter of TripAdvisor users go on beach vacations. One third of these travelers are +35 years old.

• Similarly to City Travelers, half of Beachgoers consult TripAdvisor for inspiration when considering a destination and two-thirds use TripAdvisor to research their chosen destination. In fact, they are much more likely than other travelers to be influenced by TripAdvisor to visit a destination, and they tend to book holidays at the same time every year.

• Resorts and holiday rentals are their preferred accommodation, on which the average spend is $1,257.

Cruisers

• Only 5% of travelers go on a Cruise. Two thirds of these travelers are +50 years old.

• Cruisers are twice as likely to look for a great deal and book quickly than other travelers. They are also more likely than others to travel with their family and their spouse/partner.

• The average spend on accommodation by Cruisers is $1,821 – higher than both averages for City Travelers and Beachgoers. This traveler type are also more likely to want to see multiple destinations.
City Travelers

62% of City Travelers are 35-64 years old

Half of City Travelers use TripAdvisor as inspiration on where to go. Nearly two in three planners also use the site to research their chosen destination.

Using cash for purchases on...

- In-destination transport: 61% (119)
- Attractions: 59% (116)
- In-destination shopping: 58% (106)
- Restaurants: 58% (112)

TripAdvisor is an inspiration when considering destinations: 54%
Use TripAdvisor to research chosen destination: 61%
Arranging transport to my destination was the first thing I did: 34%

Average Accommodation spend

- $660 (City Travelers)
- $925 (All Travelers)

Accommodation type

- 62% (116) Hotel
- 9% (128) Home sharing
- 9% (112) Holiday rental
- 6% (119) B&B

This traveler group is also more inclined than average traveler to use a home sharing website/app or a B&B.

Travel companions

- 56% (105) Spouse/partner
- 18% (112) Friends
- 11% (109) Family

Travel on City Breaks are more likely than others to travel with friends or family members over 18 years old.

Travel mentality

- 63% (110) History / culture
- 43% (109) Excitement & fun

Almost 2 in 3 travelers on City Breaks prefer history and culture while two in five look for excitement during their trip.

One third of travelers arrange transportation at their destination, and are more likely than others to do so.
Over half of Beachgoers use TripAdvisor as inspiration when considering a destination. 3 in 5 use TripAdvisor to research their chosen destination.

One third of travelers compare all transport and accommodation options before making any bookings.

Beachgoers are more inclined to stay at resorts and holiday rentals:

- 41% (78) Hotel
- 22% (230) Resort
- 12% (146) Holiday rental
- 8% (109) Home sharing

Beachgoers are much more likely than others to be families traveling with children, or extended family members:

- 60% (112) Spouse/partner
- 22% (148) Family (Children)
- 18% (112) Family
- 6% (135) Extended family

2 in 5 Beachgoers would change their destination if a cheaper flight was available. Half of this group also share on social media and are inspired by TripAdvisor to visit new destinations:

- 55% (112) Inspired to visit a new destination
- 53% (113) Enjoy sharing on social media
- 37% (116) change destination for cheaper flight

**Average Accommodation spend**
- $1,257 (Beachgoers)
- $925 (All Travelers)

**Initial prompt for the trip...**

- I book my trip the same time every year: 26% (157)
- Nothing in particular: 21% (85)
- A personal recommendation: 17% (115)
- Browsing on TripAdvisor inspired me to visit a destination: 16% (160)
- I saw a great deal in a sale: 15% (134)
**66% of Cruisers are +50 years old**

Half of Cruisers use TripAdvisor as inspiration when considering a destination. The same proportion then use it to research their chosen destination.

- **49%** used TripAdvisor as an inspiration
- **52%** used TripAdvisor to research
- **23%** booked quickly

Cruisers are twice as likely as other travelers to book a deal they have seen.

**Travel companions**

- **66%** (124) Spouse/partner
- **21%** (134) Friends
- **14%** (143) Family
- **6%** (150) Extended family

Cruisers are much more likely than others to travel with family.

**Travel mentality**

- **65%** (115) Prepared to pay extra for luxury
- **63%** (120) Seeing multiple destinations is better
- **42%** (112) Pay attention to exchange rates

Around two in three Cruisers are prepared to pay extra for luxury and like to visit multiple destinations.

**Average Accommodation spend**

- **$1,821** (Cruisers)
- **$925** (All Travelers)

**Using cash for purchases on...**

- **Transport to destination**
  - Cruisers: **$781**
  - All Travelers: **$587**
- **In-destination transport**
  - Cruisers: **$381**
  - All Travelers: **$185**
- **In-destination shopping**
  - Cruisers: **$370**
  - All Travelers: **$242**
- **Attractions**
  - Cruisers: **$324**
  - All Travelers: **$168**
- **Restaurants**
  - Cruisers: **$307**
  - All Travelers: **$331**
Tripadvisor®
know better • book better • go better
Introducing three customer segments

- There are three key attitude groupings among travelers which together form around 50% of TripAdvisor users. Each pair of attitude statements used to create the groupings had the strongest correlations out of all statements.

<table>
<thead>
<tr>
<th>TripAdvisor Superfans</th>
<th>13%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regularly browse TripAdvisor without a destination in mind and have been inspired by TripAdvisor to visit somewhere new*</td>
<td></td>
</tr>
<tr>
<td>The perfect trip is spending it on a warm, sunny beach</td>
<td></td>
</tr>
<tr>
<td>Likely to change destination if find cheaper flight</td>
<td></td>
</tr>
<tr>
<td>Important to stay in hotels with trusted brand name</td>
<td></td>
</tr>
<tr>
<td>Over-indexes for those from Argentina, Brazil, India and Spain</td>
<td></td>
</tr>
<tr>
<td>Average age = 49</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Cautious Travelers</th>
<th>22%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Destination choice may be affected by concerns over terrorism and political climate*</td>
<td></td>
</tr>
<tr>
<td>Important they speak my language at destination</td>
<td></td>
</tr>
<tr>
<td>Important to stay in hotels with trusted brand name</td>
<td></td>
</tr>
<tr>
<td>Pay close attention to local exchange rate</td>
<td></td>
</tr>
<tr>
<td>Over-indexes for those from Germany, Spain and Japan</td>
<td></td>
</tr>
<tr>
<td>Average age = 52</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Budget Conscious</th>
<th>12%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Have a set budget for entire trip and will use money saved on one part of a trip towards upgrading another part of the trip*</td>
<td></td>
</tr>
<tr>
<td>Pay close attention to local exchange rate</td>
<td></td>
</tr>
<tr>
<td>Likely to change destination if find cheaper flight</td>
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<tr>
<td>Important they speak my language at destination</td>
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</tr>
<tr>
<td>Over-indexes for those from Brazil, Mexico and India</td>
<td></td>
</tr>
<tr>
<td>Average age = 46</td>
<td></td>
</tr>
</tbody>
</table>

* Segment contains individuals who strongly agree with both statements
** Index calculated on those who strongly agree or tend to agree with each statement