TripBarometer 2014

Psychology of Travel Global Report

Contents

Introduction

Objective:

TripBarometer aims to understand emerging travel trends globally, regionally and locally from a multi-dimensional angle and convey businesses' and travelers' perspectives.

Specifically, this report aims to understand the 'Psychology of Travel':
◎ What motivates people to travel?
◎ What are the emotions at various stages of a vacation?
◎ How vacations change travelers?
◎ How well do hoteliers meet travelers' motivations and emotions?

Fieldwork: 17th July - 5th August 2014

Consumer survey sample size:

39,721 Interviews completed

37,024 Via a pop-up on TripAdvisor website

2,697 From the Ipsos panel

Business survey sample size:

14,083 Interviews completed

53,804 interviews in total, with the data weighted to represent the markets

Methodology

TripBarometer was introduced by TripAdvisor in 2012, with the aim of measuring and tracking global travel industry trends amongst both businesses and consumers. This is the fourth wave of TripBarometer; wave 1 and 2 of this study were conducted in 2012 and 2013 respectively, and wave 3 was conducted by Ipsos MORI earlier in 2014.

All interviewing was conducted with online methodology, as follows:

◎ The **consumer** research was conducted in 32 markets, predominantly via a pop-up link on TripAdvisor's local websites. In TripAdvisor's priority markets, Ipsos' online panels were deployed where necessary to ensure a minimum of 500 completes were achieved in each (please refer to the Appendix for detail on sample size breakdown by markets).

◎ An email invitation was sent to accommodation **businesses** who use TripAdvisor free services. A minimum of 150 completes were achieved in each priority market (with the exception of China, where 80 responses were collected)

To keep in line with previous waves of TripBarometer, survey data was weighted to represent the global online population. In addition, weighting is also applied at the country level.

◎ Consumer weighting: The data is weighted to represent the online population within each country and also to represent the country's profile in terms of age, region and gender.

◎ Business weighting: Every country has been given an equal weight. Where the base size is too small, then countries within the same region have been grouped together and given the same weight as an individual country.

In this report, no data with base sizes below 100 is reported apart from business results for China, where 80 responses were collected. Due to variances by property type/size, data by market for the business survey has also not been widely reported.

Throughout this report, travelers are defined as those who have researched or planned vacations online in the last 12 months. Business respondents were in one of the following positions/roles:

◉ Owner, manager, director, general manager, vice president, president

◉ Day-to-day management of the business, marketing, sales, commercial

The difference in sample composition across the different waves is detailed in the appendix.

How to read this report

⊙ We have used icons to indicate where the page refers to the business or consumer questionnaire:
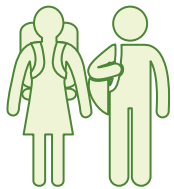
Business

Consumer

⊙ We have also used icons to identify differences between traveler life stages:

Millennials

Families

No children

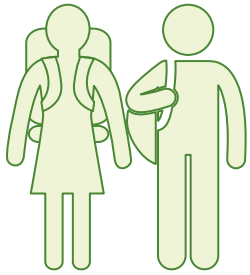**Retirees**

Travelers from different life stages

Millennials

- They are 18-34 years of age without children. Just over half are female (55%).
- Almost half of the millennial respondents reside in Asia (45%).
- They typically choose city and cultural vacations and are the most likely to take short breaks (48% cite their typical vacation length is under a week).
- Throughout the journey, millennials are the most likely to feel energized, passionate and challenged.
- Post-vacation, they are the most likely to become more open-minded and appreciate their own cities more.
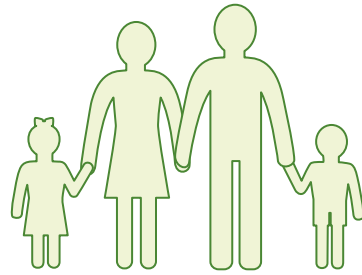
Families

- They are aged between 25-54, married with children under the age of 18.
- They are more likely to choose sun and beach vacations and are the most likely to be motivated by a desire to build relationships and have a sense of harmony on vacations.
- Families are also more likely to feel closer to their loved ones at all stages of the vacation.
- They are also more likely to focus more on their relationships with friends and family after their trips.
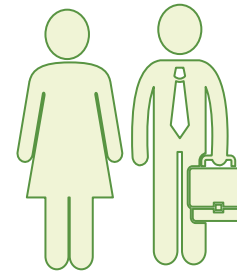
No children

- They are aged between 35-54 and have no children.
- They tend to reside in Europe and North America.
- They prefer city and cultural trips, and are more likely than other life stages to be motivated by feelings of luxury during vacations.
- They are the most likely to feel fulfilled towards the end of a vacation.
- Following a vacation, those with no children are more likely to make changes to their life as a result of their trips than retirees, but less likely to do so than millennials.
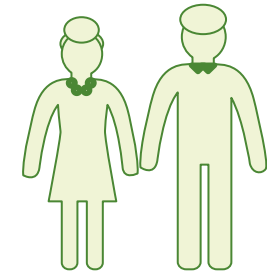
Retirees

- They are 55+, with two-thirds being male (66%).
- Retiree respondents tend to reside in developed countries (US, UK, Canada, France).
- Retirees are the most likely to want to immerse themselves in local culture, and prefer city and cultural trips.
- They are the most likely to feel confident, knowledgeable and in control throughout the trip.
- Post-vacation, retirees are the least likely to make changes to their life, but of those who do, they are the most likely to introduce new foods into their diet.

Base: All consumer respondents (39721), Millennials (8211), Families (9326), No children (9908), Retirees (8311)
NB. These life stage demographics are characteristic of respondents from this survey only. Not all respondents fall into one of these categories.

Ipsos

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The Psychology of Travel in a Snapshot

Travelers want to enhance their perspectives

- ◎ Motivations to travel are measured through a tested framework from Ipsos

- ◎ Eight motivation categories are derived based on two dimensions – 'personal' and 'social'

- ◎ Travelers are most motivated to 'enhance their perspectives' and feel 'liberated' on vacation

- ◎ However, hoteliers' main aim is to offer a sense of 'harmony' to guests

Framework to understand vacation motivations

Proven approach on understanding human motivations

Based on Ipsos' extensive research in various sectors, we understand consumers have different psychological needs across different settings and scenarios. For example, travelers who tend to go on city breaks with a group of friends are looking to fulfil a different motivation than those who tend to travel as a couple on sun and beach/sea vacations.

To understand the psychology of travel for this wave of TripBarometer, Ipsos' framework has been adopted. This framework can be visualized as a compass with two dimensions, forming eight motivational categories. The compass has been tailored specifically in the context of taking vacations.

Two travel attributes comprise each of the travel motivations around the wheel, so that we can best place where respondents sit on the motivation framework.

1. Vertical dimension – Personal

This is the dimension that shows how travelers want to feel internally. The top of the wheel (liberation) accounts for travelers who approach a vacation with an open mind and want to let go and feel carefree. On the opposite end of the spectrum (order), we have travelers who like to feel more in control and act in a more restrained manner.

2. Horizontal dimension – Social

This is the dimension that shows how travelers want to be perceived by others, where the left side (luxury) accounts for those who would like a vacation to help them stand out from the crowd as an individual and show their affluence. On the right side (relationships) are those who want a vacation to allow them to spend time with their loved ones and build relationships.
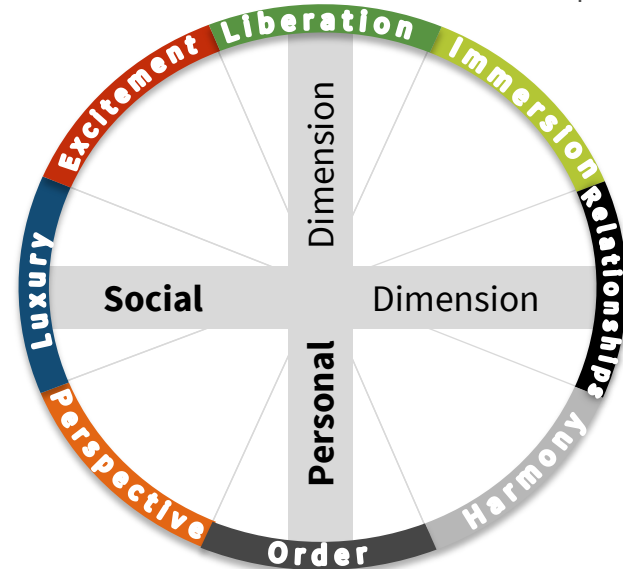
Definitions of each vacation motivation

- Two motivation attributes, relating to travel make up overall travel motivation
- Travelers chose which best applied to how they want to feel on vacation
- Hoteliers were also asked how they want their guests to feel

Travel Attributes	Overall Travel Motivation
Help me to enjoy life to the fullest Allow me to let go and feel completely carefree	**Liberation**
Allow me to immerse myself in the local life and culture Help me to meet new people and create memories	**Immersion**
Allow me to enjoy special moments together with my loved ones Allow me to strengthen relationships with those close to me	**Relationships**
Restore my sense of harmony and balance Allow me to feel looked after and taken care of	**Harmony**
Give me time out to think and regain control of my life Allow me to feel organized and avoid surprises	**Order**
Provide me with unique and interesting experiences Broaden my knowledge & enrich my understanding of the world	**Enhancing perspective**
Provide me with enviable experiences Allow me to feel special and spoil myself	**Luxury**
Give me a sense of exhilaration Challenge me to try something new	**Excitement**
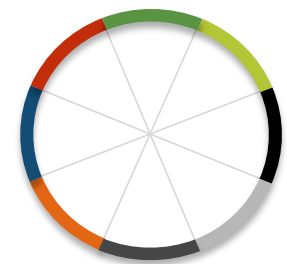
Summary

Travelers want to enhance their perspectives

Travelers want to have unique and interesting experiences on vacation. Alongside this, broadening their knowledge and enriching their understanding of the world is also crucial. Together these form the top overall vacation motivation: 'Enhancing perspectives'. Seven in 10 travelers across the globe say this is their primary travel motivation. This is supported by vacation type, as two in three travelers say they typically take city and cultural trips.

The second highest vacation motivation is 'Liberation', which is driven by a need to enjoy life to the fullest and to a lesser extent, being able to let go and feel completely carefree. Nearly half of travelers say that their vacation motivation is 'Immersion', the third most popular motivation globally. This motivation is about feeling immersed in local culture, meeting new people and creating memories.

Closely following 'Immersion' is the motivation around 'Relationships' which includes wanting to enjoy special moments with loved ones (the fourth most selected attribute) and strengthening relationships with those close to them.

Although 'Enhancing perspectives' is the priority for travelers globally, there are some slight differences between travelers from different countries. Most notably, Thai travelers are more likely to feel 'Liberation' than other countries, whilst the Turkish and Japanese crave 'Excitement' from a vacation. Russians want a feeling of 'Luxury' on vacation, whilst Italians would rather feel a sense of 'Harmony'.

Hoteliers are only focused on the basics

Whilst travelers are looking to 'Enhance their perspectives' when they take a trip, the majority of hoteliers aim to offer guests a sense of 'Harmony'. Hoteliers' top motivation is to ensure guests feel looked after and taken care of. Conversely, travelers place this as their last priority. Hoteliers are currently focusing on delivering the hygiene factors, rather than being able to cater to the more complex travel needs.

However, all is not lost: The second most popular attribute for hoteliers is to help guests have unique and interesting experiences - the top attribute for travelers. Although 'Enhancing their perspectives' sits fourth in hotelier motivation priorities, nearly half say they want to provide this feeling.

'Liberation' and 'Immersion' make up the next top hotelier motivations and are not too misaligned with travelers. Looking at specific motivations by traveler groups will help hoteliers focus on their target audience.

Similar to traveler groups, there are country nuances among hoteliers apart from the overall sense of 'Harmony'. Consistent with Thai travelers, Thai hotels aim to offer a sense of 'Liberation', along with Portugal, Brazil and Austria. Chinese and Moroccan hotels cater to 'Excitement'. Indian and Caribbean hotels aim to engender 'Relationships', whilst hotels in Japan and New Zealand are arguably getting it the most 'right' by tending towards 'Enhancing perspectives'.

How travelers want to feel

◉ Above all travelers want to have unique and interesting experiences, enjoy life and broaden their knowledge and understanding of the world.

Travel Attributes (%)

Attribute	%
Provide me with unique and interesting experiences	55
Broaden my knowledge & enrich my understanding of the world	44
Help me to enjoy life to the fullest	45
Allow me to let go and feel completely carefree	33
Allow me to immerse myself in the local life and culture	36
Help me to meet new people and create memories	21
Allow me to enjoy special moments together with my loved ones	42
Allow me to strengthen relationships with those close to me	19
Give me a sense of exhilaration	18
Challenge me to try something new	16
Restore my sense of harmony and balance	17
Allow me to feel looked after and taken care of	6
Provide me with enviable experiences	14
Allow me to feel special and spoil myself	10
Give me time out to think and regain control of my life	12
Allow me to feel organized and avoid surprises	10

Overall Travel Motivation

- Enhancing perspective
- Liberation
- Immersion
- Relationships
- Excitement
- Harmony
- Luxury
- Order

CQ29a/b. When you go on holiday/vacation, which of the following statements best apply to how you want to feel?
Base: All consumer respondents answering (39,721)

Ipsos

Travelers' overall vacation motivations

⊙ The majority of travelers want to 'Enhance their perspectives' whilst on vacation and enjoy a feeling of 'Liberation'. Fewer are looking for 'Harmony' and 'Order'.

(%)   **Travelers**

Motivation	Value
Enhancing perspective	71
Liberation	62
Immersion	47
Relationships	47
Excitement	31
Luxury	22
Harmony	21
Order	21

CQ29a/b. When you go on holiday/vacation, which of the following statements best apply to how you want to feel?
Base: All consumer respondents answering (39,721)

12
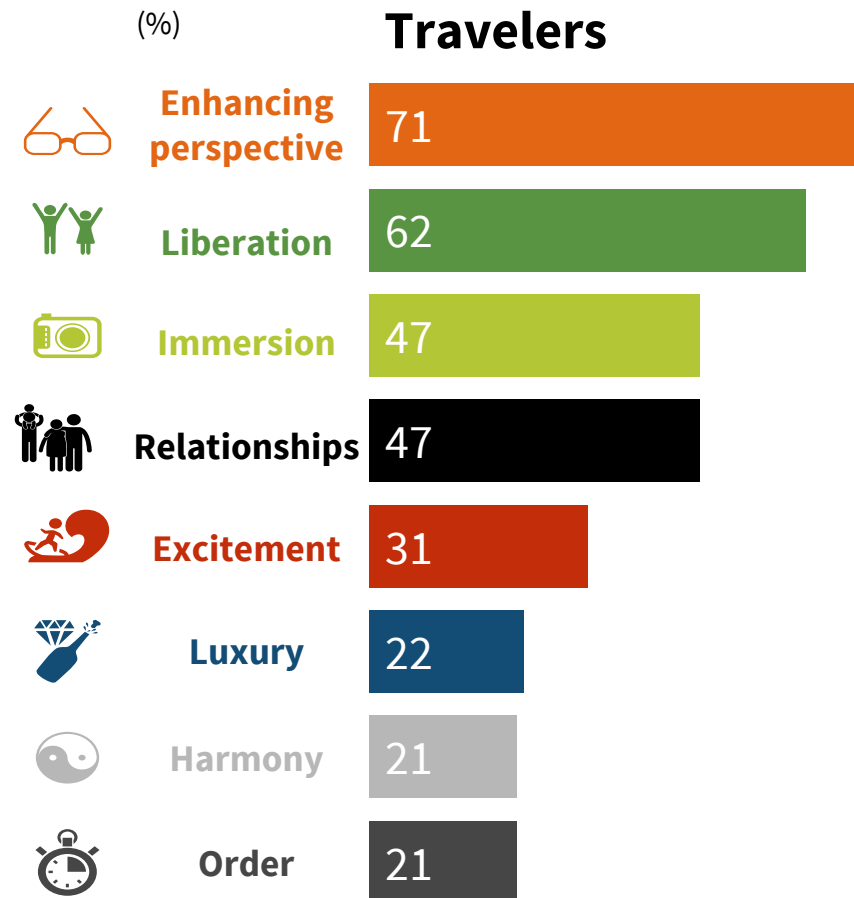
How hoteliers want their guests to feel

- Feeling 'looked after and taken care of' is the least mentioned motivation for travelers. In contrast, this is the number one feeling hoteliers try to elicit.

Travel Attributes (%)

Attribute	Value
Feel looked after and taken care of	58
Restore their sense of harmony and balance	34
Have unique and interesting experiences	42
Broaden knowledge & enrich their understanding of the world	7
Meet new people and create memories	32
Allow them to immerse themselves in the local life and culture	30
Let go and feel completely carefree	30
Enjoy life to the fullest	29
Enjoy special moments with their loved ones	28
Strengthen relationships with those close to them	13
Feel special and spoiled	22
Have enviable experiences	15
Take time out to think and regain control of their lives	17
Feel organized and avoid surprises	12
Feel a sense of exhilaration	8
Feel challenged to try something new	7

Overall Travel Motivation

- Harmony
- Enhancing perspective
- Immersion
- Liberation
- Relationships
- Luxury
- Order
- Excitement

Mismatch of vacation motivations

⊙ In terms of their offer, hoteliers underestimate travelers' desire to 'Enhance their perspective' and overestimate travelers' need for 'Harmony'.

	Hoteliers	(%)		Travelers
	45		**Enhancing perspective**	71
	49		**Liberation**	62
	50		**Immersion**	47
	34		**Relationships**	47
	14		**Excitement**	31
	33		**Luxury**	22
	73		**Harmony**	21
	27		**Order**	21

14
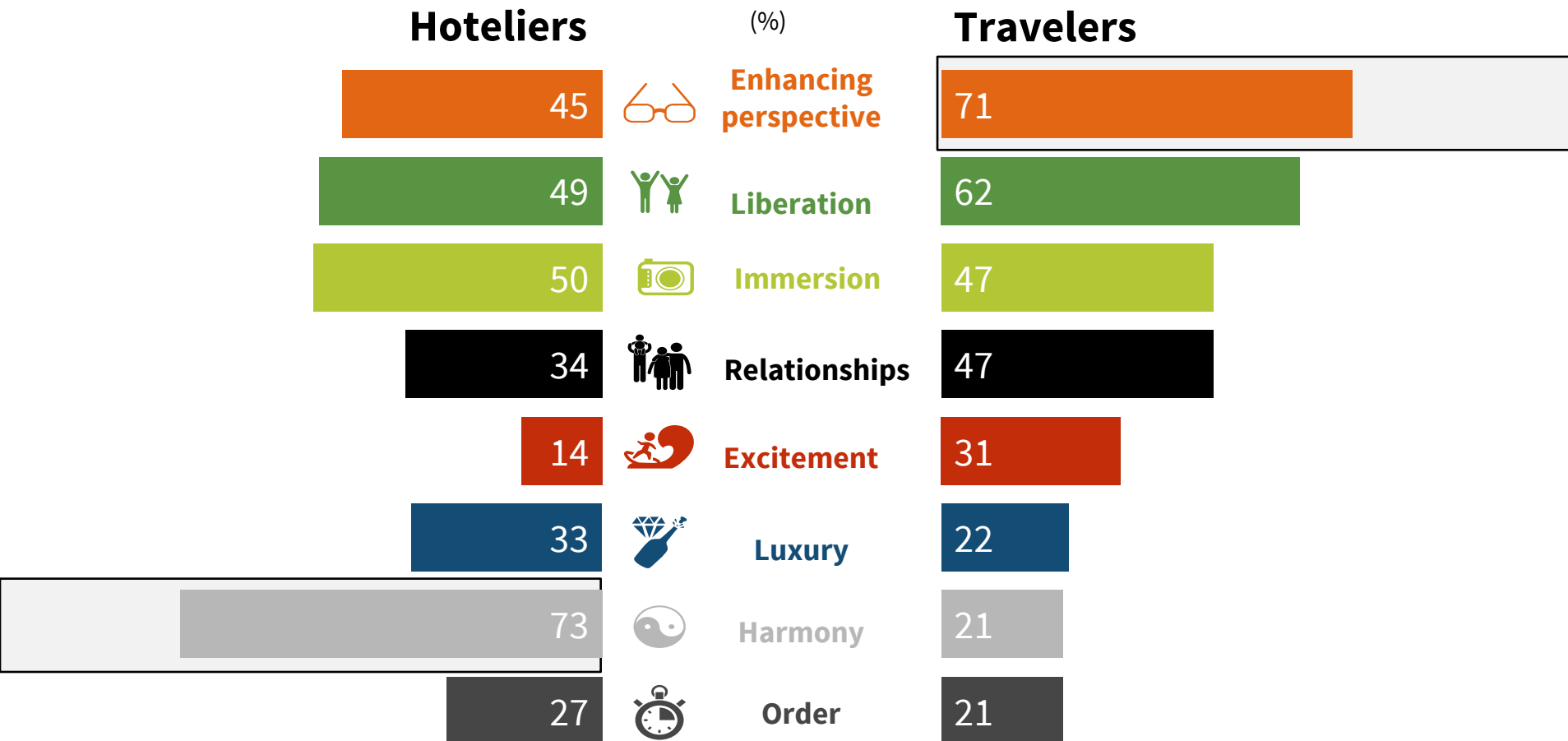
How travelers want to feel – by countries

⊙ 'Enhancing Perspectives' is the priority globally, but zooming in closer reveals nuances in data between countries.

Malaysians equally crave **enhancing perspective** & **liberation**, hence sitting somewhere in between the two

CQ29a/b. When you go on holiday/vacation, which of the following statements best apply to how you want to feel?
Base: All consumer respondents answering (39,721)

15
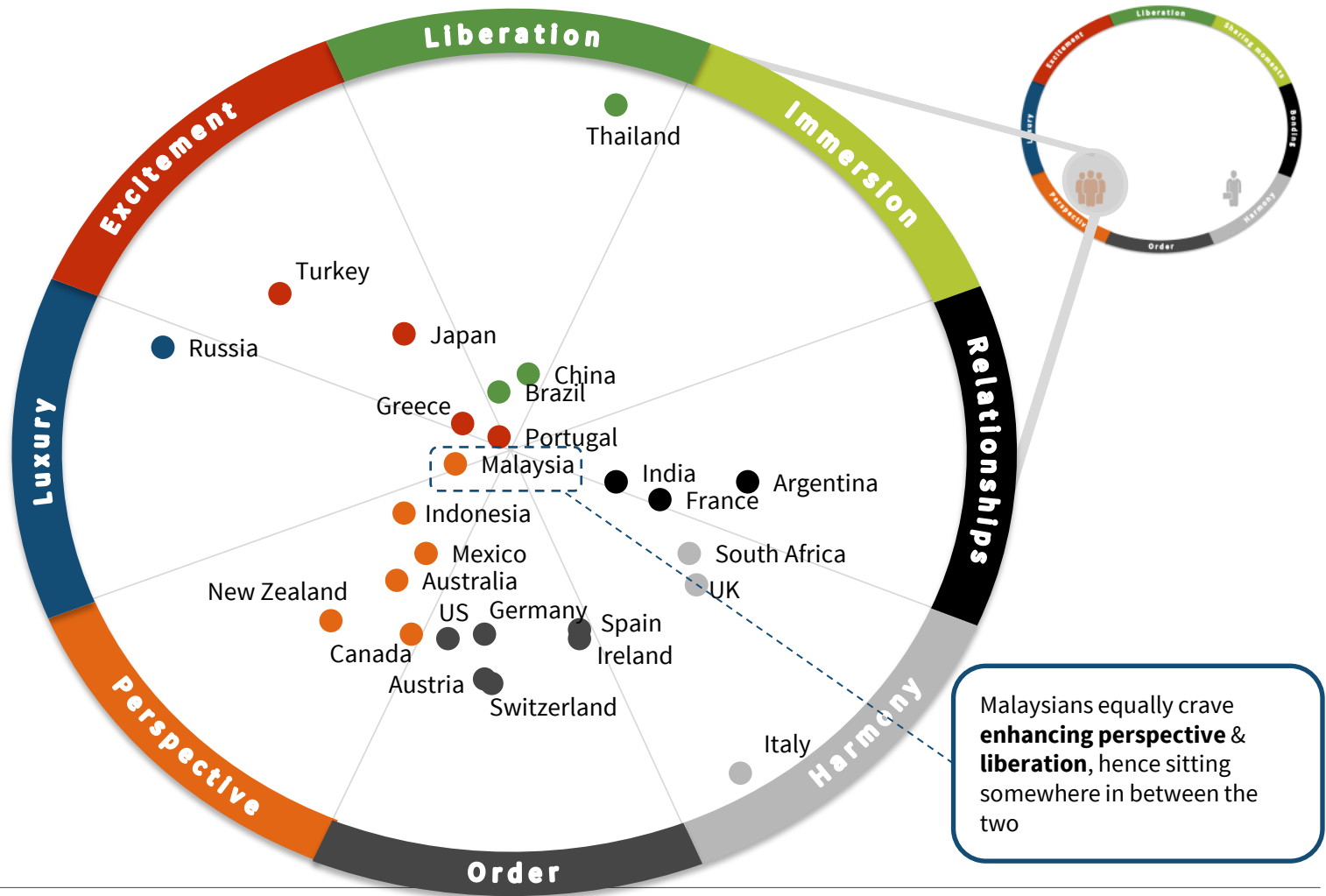
How hotels want their guests to feel – by country

⊙ 'Harmony' is the priority globally for hoteliers, but zooming in closer reveals nuances in countries' differences.

The UK scores the highest for offering a sense of **harmony**, and is also more likely than the majority of countries to promote **luxury**, hence sitting somewhere in between the two

BQ34ab. Which of the following do you want your guests to feel as a result of their overall stay in your hotel/property?
Base: All business respondents answering (14,083)

16
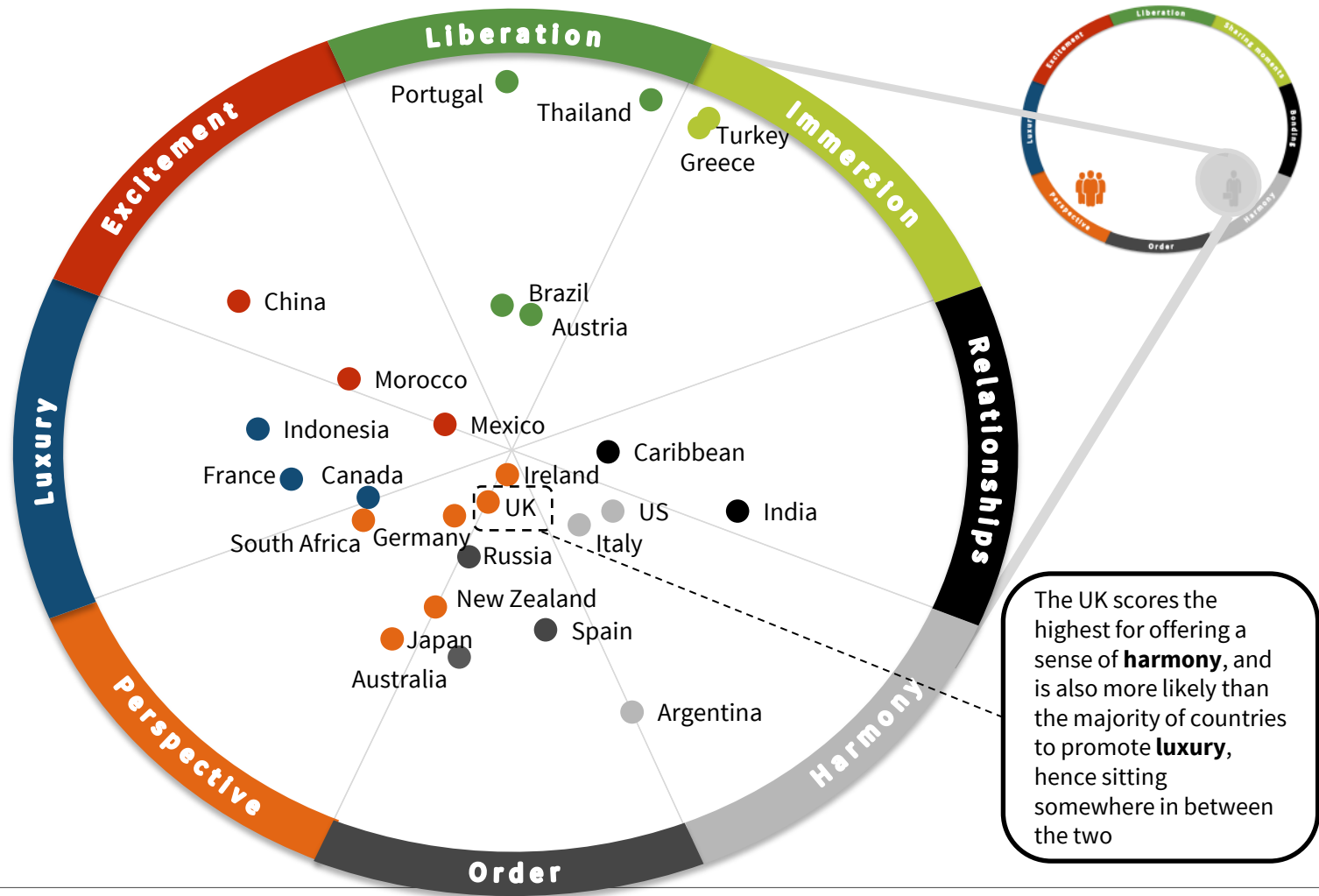
Ups and Downs of Travel

Excited on pre-arrival, fulfilled upon departure

◎ Excitement, relaxation and fulfilment are the key emotions that travelers experience whilst taking a vacation

◎ Throughout the journey, hoteliers tend to focus primarily on delivering hygiene factors such as smooth & efficient booking process

Summary

Excitement peaks before vacation

For the average traveler, excitement is the predominant emotion felt during the build up to a vacation. The Japanese and Australians are the two nations where travelers get most excited during lead-up to vacations.

Being able to arrive at the destination is sufficient to make travelers feel energized, particularly among millennials and those who tend to travel with friends.

Excitement ebbs during vacation and leads to relaxation

The feeling of being relaxed is most pronounced amongst travelers from the European nations of UK, Ireland, Germany and Austria. Travelers who tend to go on sun, beach/sea holidays are also more likely to feel relaxed during this stage of the journey.

Travel ends with a sense of fulfilment

The feeling of fulfilment builds up during stay and crescendos upon departure. Brazilian travelers are the most likely to feel fulfilled upon conclusion of a vacation. Travelers also feel more secure once back home, particularly those who tend to travel solo.

Age is not the only differentiation among life stages

Millennials and retirees sit somewhat on two spectrums. In addition to a higher sense of excitement and energy, millennials feel more passionate about the vacation, whereas retirees are more focused on having a sense of control.

Those who travel as a couple and as a family consistently report a greater feeling of being closer to loved ones.

And possibly some gender stereotypes emerge

Women are more likely than men to feel excited, energized, fulfilled and closer to their loved ones on vacations. On the other hand, men tend to feel more in control, confident, secure, knowledgeable and productive.

Different vacation, different emotions

In addition to the prevailing emotions, those who tend to go on city and cultural vacations are more likely to feel knowledgeable at various vacation stages than the average traveler. Travelers who usually go on activity and adventure trip tend to feel more energized, while those who usually take health and wellbeing trips feel more liberated, affluent and secure. Solo travelers are also more likely to feel liberated, while those who travel with people they do not know often return feeling more open-minded.

Hoteliers could do more to build up excitement for guests

Hoteliers currently prioritize the basics – minimizing stress and ensuring a smooth and efficient process during the lead-up to travel. Only a minority of hoteliers are already making guests feel as though their vacation has begun from the booking stage, and those who do tend to see a higher rate of return guests. Similarly, those who actively contact guests to build excitement during lead-up constitute a small proportion of hoteliers, but those who do tend to receive more return guests. Currently, resorts and luxury hotels are more likely to focus on these objectives.

A focus on exceptional customer experience could reap return

As relaxation takes over during the vacation itself, we see that the primary objective of hoteliers is delivering outstanding customer service and continuing to build a rapport with guests. This is instrumental in capturing an above average number of return guests.

The emotional rollercoaster of travel

⊙ Travelers experience strong feelings of excitement during the early phases of a trip, then relax during the trip itself. They are left with a sense of fulfilment upon departure.

Booking	Arrival at destination	During the stay	Departing from destination	Back at home

Excited (red): 54, 55, 31, 11, 9
Relaxed (grey): 11, 24, 45, 32, 36
Fulfilled (green): 12, 19, 26, 47, 45

Excited   **Relaxed**   **Fulfilled**
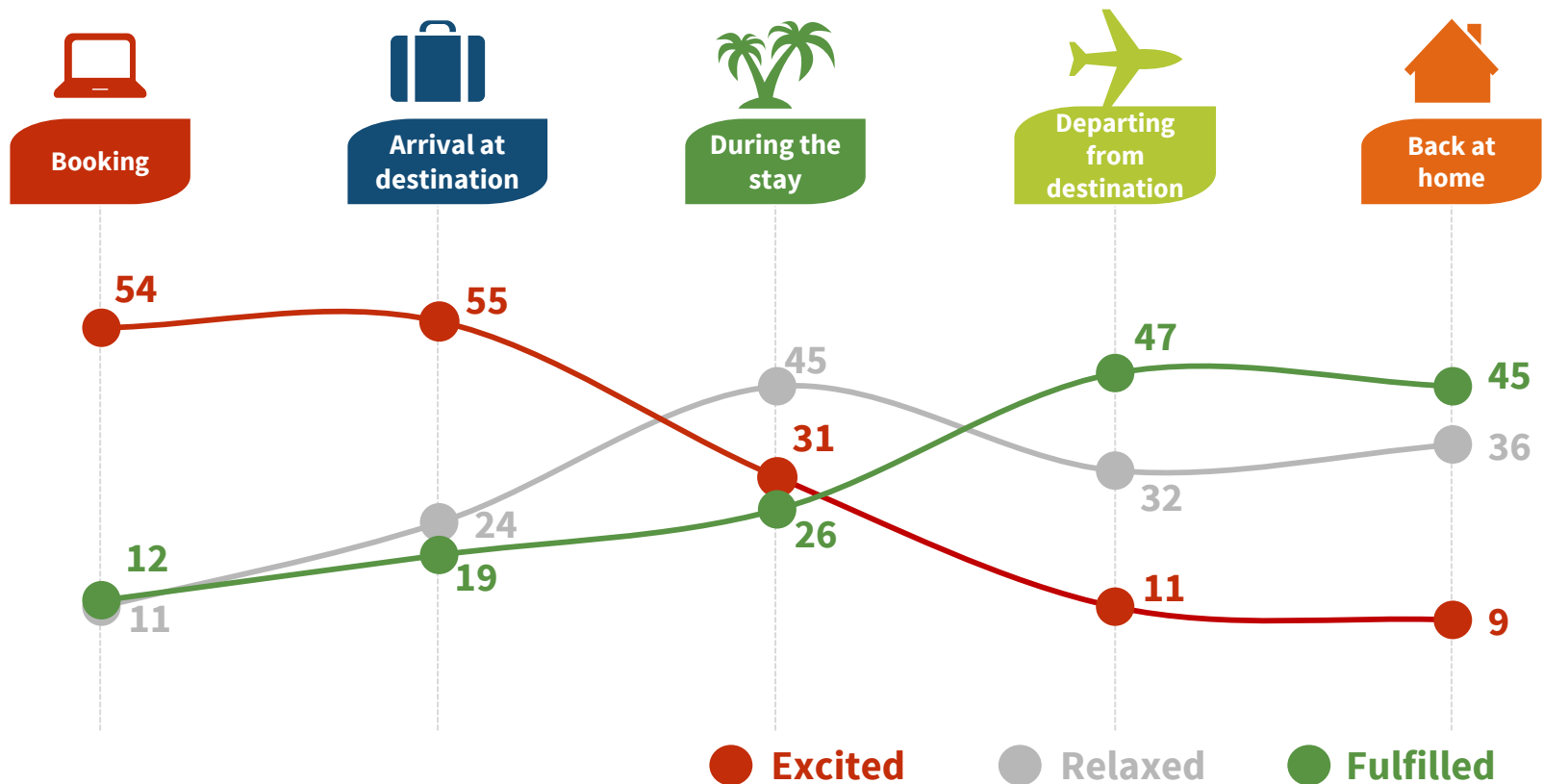
(%, showing top 3 emotions only out of 15)

CQ34. Thinking about your typical holiday/vacation, how do you feel at each stage of your trip?
Base: All consumer respondents answering excluding DK's (c37,000)

Ipsos

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The emotional rollercoaster of travel

⊙ Travelers are most energized the moment they arrive at the destination, whereas feeling knowledgeable dips during their stay. Being back home elicits the strongest feelings of being secure.

| Booking | Arrival at destination | During the stay | Departing from destination | Back at home |

Energized ● **Knowledgeable** ● **Secure** ● **Closer to loved ones** ● **Liberated**
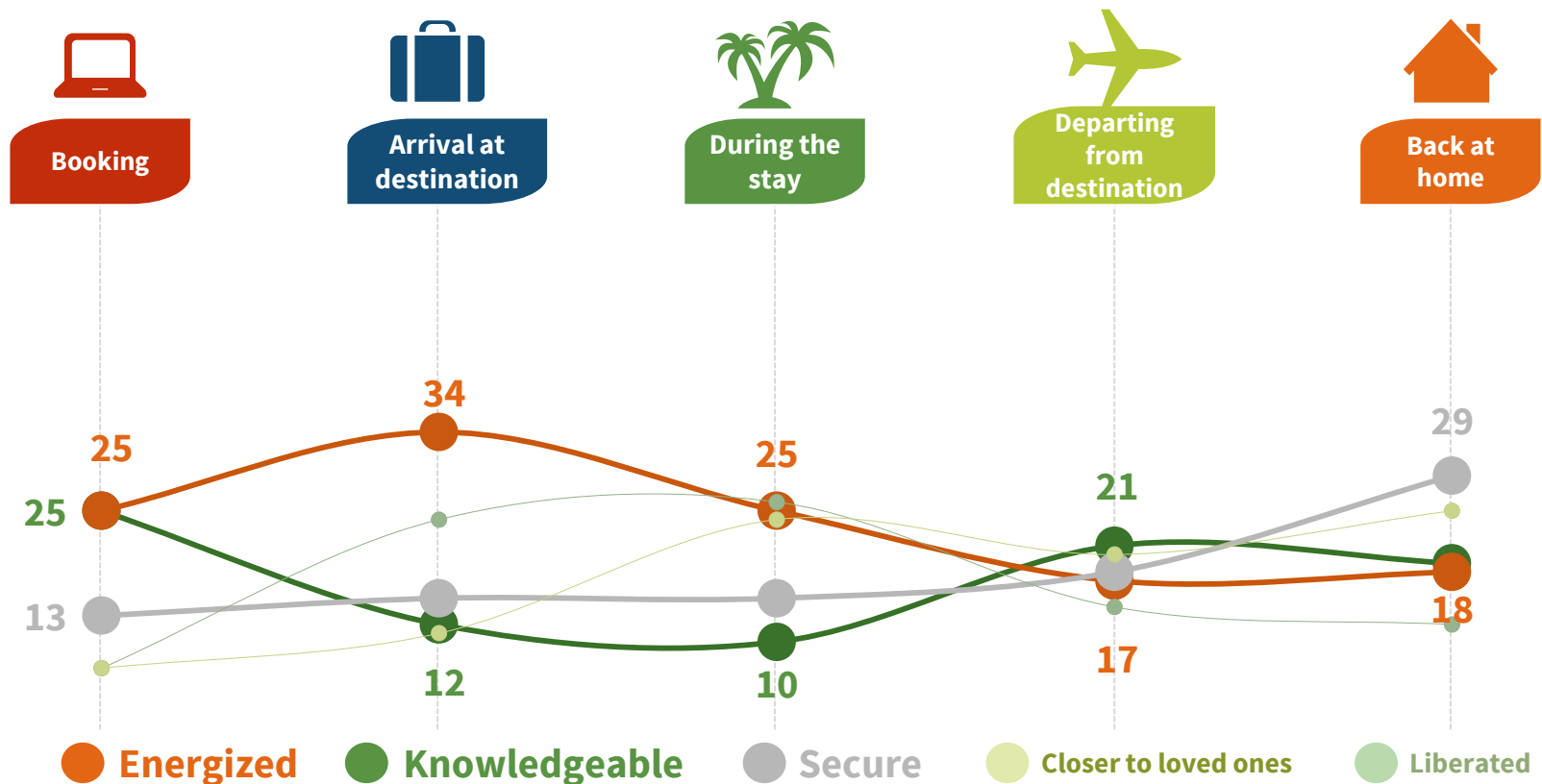
(%, showing 4th to 8th emotions out of 15)

CQ34. **Thinking about your typical holiday/vacation, how do you feel at each stage of your trip?**
Base: All consumer respondents answering excluding DK's (c37,000)

20

Hoteliers' objectives for pre-arrival

⊙ Minimizing stress and ensuring a smooth and efficient process are key hotelier objectives during vacation build-up, but only a minority of hoteliers are trying to build excitement at this stage.

Booking — **54%** Excited

Arrival at destination — **55%** Excited

Hotels' principal objectives…
Top 5

Booking

Arrival at destination

(%)

52	46	31	27	16		36	35	31	30	26
Smooth & efficient process	Re-assured about booking	Introduce guests to the hotel	Additional travel sugges-tions	Make guests feel as though vacation has begun		Minimize any potential stress	Additional travel sugges-tions	Introduce guests to the hotel	Provide local info	Begin building a relation-ship

CQ34. Thinking about your typical holiday/vacation, how do you feel at each stage of your trip?
BQ36. At each stage, what is your hotel/properties principle aim?
Base: All consumer respondents answering excluding DK's (c37,000), All business respondents answering (14,083)

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Hoteliers' objectives for post-arrival

⊙ Hoteliers' principal focus is on delivering exceptional customer service during stay, however a third encourage and offer local experiences.

During the stay	45% Relaxed	Departing from destination	47% Fulfilled	Back at home	45% Fulfilled

Hotels' principal objectives…
Top 5 (%)

During the stay

50	42	32	27	22
Go 'above & beyond' to offer exceptional customer service	Continue to build rapport with guests	Encourage and offer local experiences to guests	Additional travel suggestions	Ensure guests feel safe and secure

After guests leave

57	44	39	28	7
Encourage guests to write an online review	Build a lasting relationship with the guest	Thank guests for their stay	Encourage guests to come back for another visit	Help guests feel they are still connected to their vacation

Feeling knowledgeable during stay

⊙ Travelers' lowered sense of feeling knowledgeable during the stay, together with their main vacation motivation of 'enhancing perspective' gives hotels opportunities to address these psychological travel needs.

Travelers feeling knowledgeable...

Booking	Arrival at destination	During the stay	Departing from destination	Back at home
25%	12%	10%	21%	19%

Hotels' principal objectives...
(%)

50	42	32	27	22	13	11
Go 'above and beyond' to offer exceptional customer service	Continue to build a rapport with guests	Encourage and offer local experiences to guests	Provide additional travel suggestions	Ensure guests feel safe and secure	Provide local information on destination	Introduce guests to the hotel

Ipsos

Emotions during booking – detailed finding

⊙ Travelers are most excited when booking a vacation. Having a sense of control, being knowledgeable and energized are secondary.

Booking	Arrival at destination	During the stay	Departing from destination	Back at home

(%)

Excited	In control	Knowledg-eable	Energized	Challenged	Confident	Open minded	Productive	Passionate	Secure	Fulfilled	Relaxed	Liberated	Closer to loved ones	Affluent
54	29	25	25	22	21	21	18	15	13	12	11	7	7	7
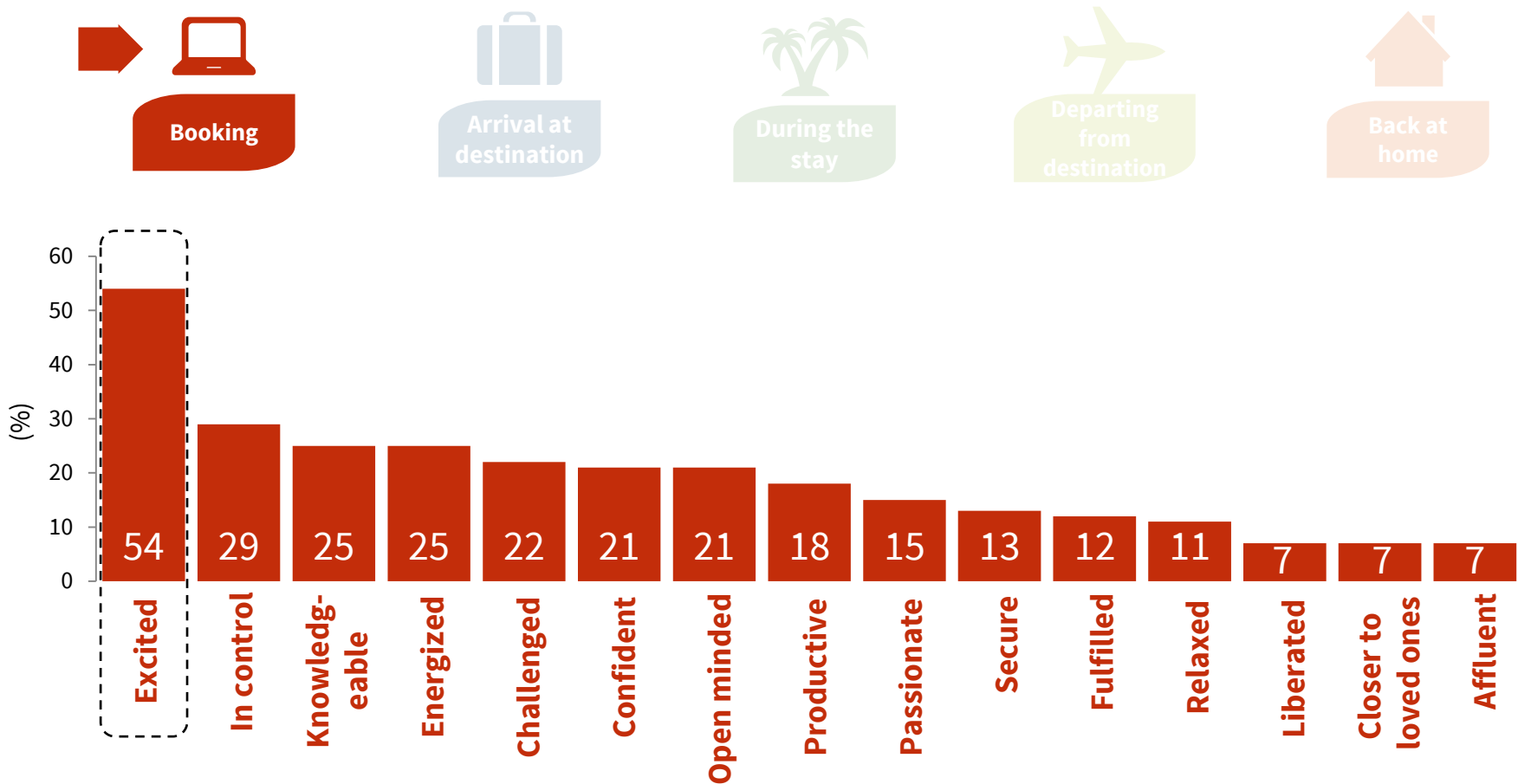
Emotions during booking – by life stage

⊙ Millennials and retirees have more emotional peaks and lows during the traveler journey – noticeably on levels of excitement, passion and confidence.

Booking

Arrival at destination

During the stay

Departing from destination

Back at home

29% 27% 27% 18%

Millennials
Families
No children
Retirees

(%)

60
50
40
30
20
10
0

Excited | In control | Knowledg-eable | Energized | Challenged | Confident | Open minded | Productive | Passionate | Secure | Fulfilled | Relaxed | Liberated | Closer to loved ones | Affluent

CQ34. Thinking about your typical holiday/vacation, how do you feel at whilst booking?
Base: All consumer respondents answering excluding DK's (37,266)

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Hoteliers' principal objective during booking – detailed finding

⊙ Efficiency and reassurance are the primary objectives for hoteliers at the point of booking, with resort and luxury hotels being more likely to tap into travelers' excited mind set.

Booking

Lead up to stay

During the stay

After guests leave

(%)

Resort = 58%

52
Make the process as smooth and efficient as possible

46
Make guests feel reassured about their booking

Hostel = 40%

31
Introduce guests to the hotel

27
Provide additional travel suggestions

Resort = 24%
Luxury = 20%

16
Make guests feel as though the vacation has already begun

14
Provide local information on the destination

12
Promote add on services to guests

BQ36a. At the time of booking, my hotel/property's principal objectives are to…
Base: All business respondents answering (14,083)

Emotions upon arrival – detailed finding

⦿ Excitement is sustained when travelers arrive at their destination. This is also the moment they feel most energized, relaxed and liberated.

Booking → **Arrival at destination** During the stay Departing from destination Back at home

Emotion	%
Excited	55
In control	15
Knowledgeable	12
Energized	34
Challenged	13
Confident	17
Open minded	23
Productive	6
Passionate	13
Secure	15
Fulfilled	19
Relaxed	24
Liberated	24
Closer to loved ones	11
Affluent	6

Ipsos
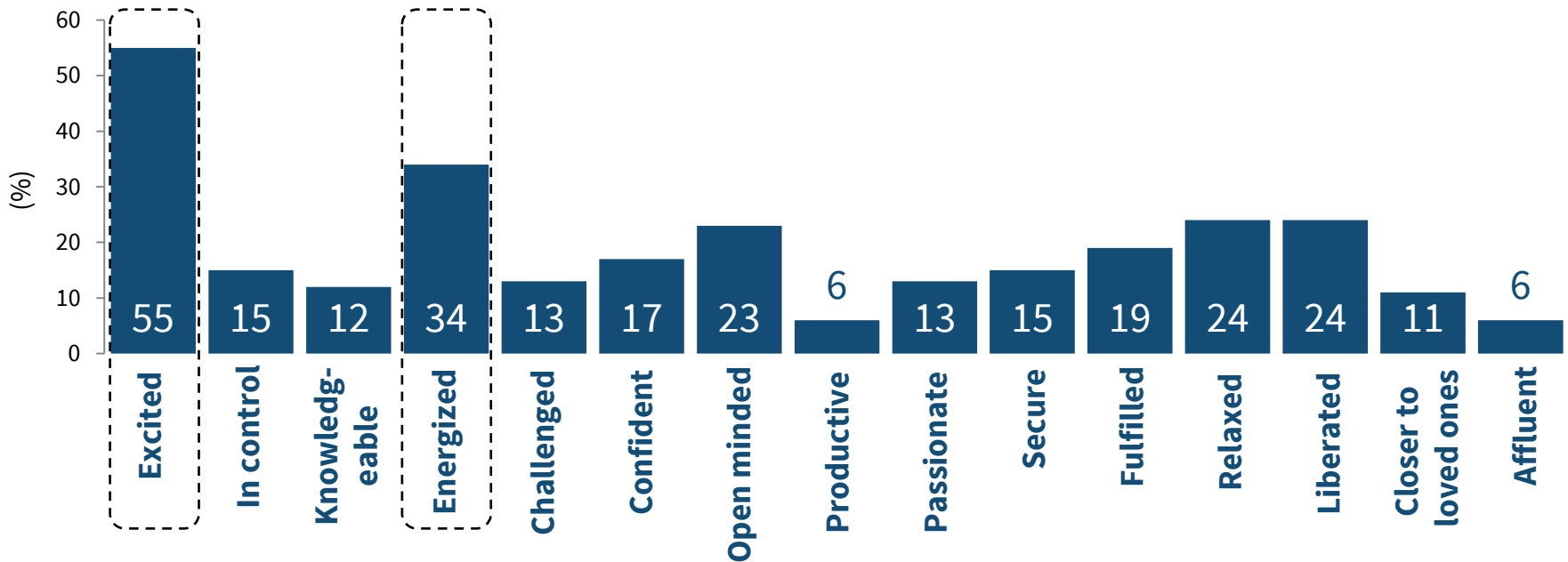
Emotions upon arrival – by life stage

⊙ Millennials maintain their feelings of passion and energy upon arrival at the destination, whilst retirees are feeling more open-minded and relaxed.

Booking

Arrival at destination

During the stay

Departing from destination

Back at home

Legend:
- Millennials
- Families
- No children
- Retirees

39% (Energized)
28% (Open minded)
17% (Passionate)
30% (Relaxed)

(%) axis: 0, 10, 20, 30, 40, 50, 60

Categories: Excited, In control, Knowledg-eable, Energized, Challenged, Confident, Open minded, Productive, Passionate, Secure, Fulfilled, Relaxed, Liberated, Closer to loved ones, Affluent

CQ34. Thinking about your typical holiday/vacation, how do you feel at upon arrival at your destination?
Base: All consumer respondents answering excluding DK's (37,147)

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Ipsos

Hoteliers' objectives leading up to the stay

⊙ Reducing stress and providing travel suggestions are hoteliers main priorities leading up to stay. A minority actively contact guests to build excitement.

Booking

Lead up to stay

During the stay

After guests leave

(%)

36
Minimize any potential stress (e.g. reconfirm booking, offer free transfers)

35
Provide additional travel suggestions (e.g. restaurant choices, attractions, itineraries)

Hotel = 36%

31
Introduce guests to the hotel (e.g. its location and facilities)

30
Provide local information on the destination (e.g. weather, history of the area)

Resort = 31%

26
Begin building a relationship with guests (e.g. introduce hotel/front desk staff)

Resort = 25%

18
Promote add on services to guests (e.g. transfers)

13
Actively contact guests to build excitement about their upcoming vacation

BQ36b. After a guest has booked with you, my hotel/property's principal objectives are to…
Base: All business respondents answering (14,083)

Emotions during the stay – detailed finding

- Travelers' excitement ebbs and instead a sense of relaxation emerges during the vacation. There is also a growing sense of being closer to loved ones.

Booking

Arrival at destination

During the stay

Departing from destination

Back at home

(%)	Excited	In control	Knowledg-eable	Energized	Challenged	Confident	Open minded	Productive	Passionate	Secure	Fulfilled	Relaxed	Liberated	Closer to loved ones	Affluent
	31	12	10	25	10	11	22	10	15	15	26	45	26	24	9

CQ34. Thinking about your typical holiday/vacation, how do you feel during the stay?
Base: All consumer respondents answering excluding DK's (37,273)

30

Emotions during the stay – by life stage

⊙ The sense of being closer to loved ones is mainly driven by families, more so than all other life stages.

Booking

Arrival at destination

During the stay

Departing from destination

Back at home

Legend:
- Millennials
- Families
- No children
- Retirees

Callouts: 15%, 24%, 23%

Y-axis: (%) — 0, 10, 20, 30, 40, 50, 60

X-axis emotions: Excited, In control, Knowledg-eable, Energized, Challenged, Confident, Open minded, Productive, Passionate, Secure, Fulfilled, Relaxed, Liberated, Closer to loved ones, Affluent

Ipsos
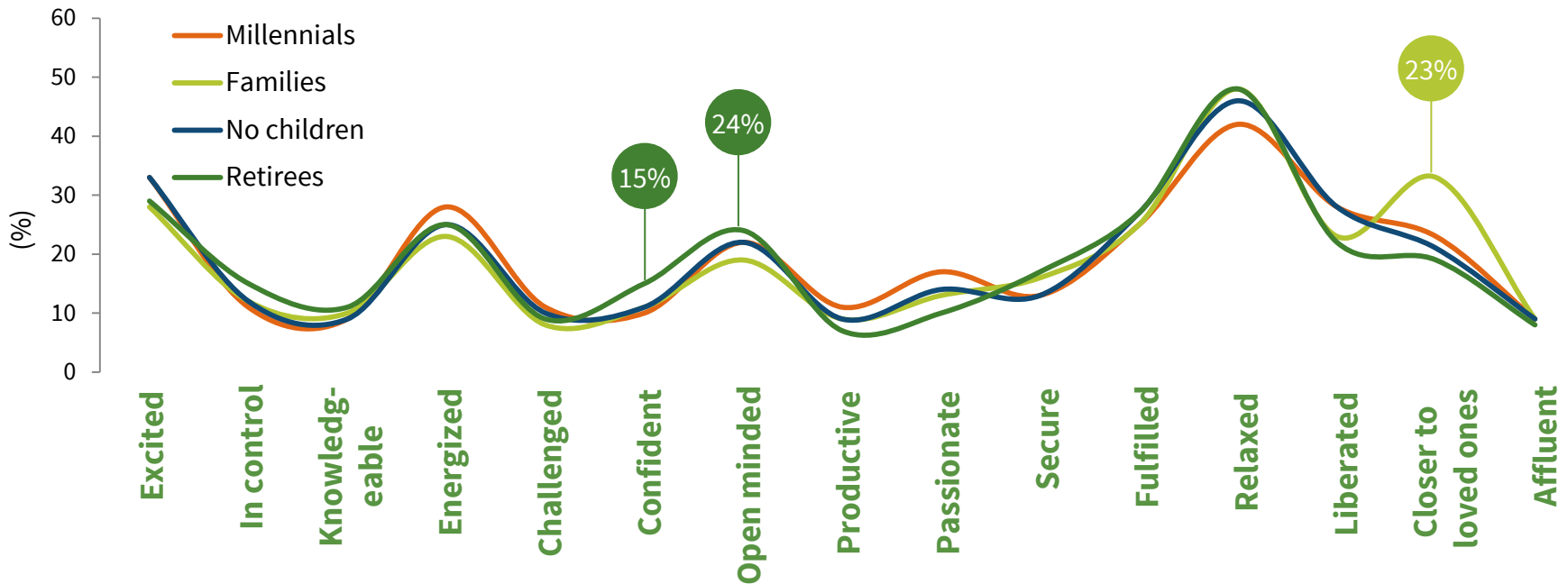
Hoteliers' principal objectives during the stay

⊙ Hoteliers' principal focus is on delivering exceptional customer service during the stay, particularly noticeable amongst luxury and boutique hotels.

Booking

Lead up to stay

During the stay

After guests leave

(%)

Luxury = 65%
Boutique = 63%
Resort = 59%

Inn/B&B = 35%

Hostel = 16%

50
Go 'above and beyond' to offer an exceptional customer service experience to all guests

42
Continue to build a rapport with guests (e.g. through hotel/front desk staff)

32
Encourage and offer local experiences to guests (e.g. local excursions and tours, local restaurants)

27
Provide additional travel suggestions (e.g. restaurant choices, attractions)

22
Ensure guests feel safe and secure (e.g. provide 24/7 security service)

13
Provide local information on destination (e.g. weather)

11
Introduce guests to the hotel (e.g. its location and facilities)

BQ36c. During a guests stay, my hotel/property's principal objectives are to…
Base: All business respondents answering (14,083)

32

Emotions during departure – detailed finding

⊙ Fulfilment peaks at the conclusion of vacation, alongside feeling relaxed. Excitement dissipates but there is an increased sense of regaining control and feeling knowledgeable.

Booking | Arrival at destination | During the stay | Departing from destination | Back at home

Emotion	Value
Excited	11
In control	20
Knowledgeable	21
Energized	17
Challenged	9
Confident	16
Open minded	12
Productive	10
Passionate	7
Secure	18
Fulfilled	47
Relaxed	32
Liberated	14
Closer to loved ones	20
Affluent	11

(%)

CQ34. Thinking about your typical holiday/vacation, how do you feel when departing from your destination?
Base: All consumer respondents answering excluding DK's (36,145)

33

Emotions during departure – by life stage

⊙ Retirees feel more in control and knowledgeable when departing from their destination. The feeling of being energized plummets for millennials.

Booking | Arrival at destination | During the stay | Departing from destination | Back at home

Legend:
- Millennials
- Families
- No children
- Retirees

Callouts: 26%, 25%, 24%

Y-axis: (%) 0, 10, 20, 30, 40, 50, 60

X-axis categories: Excited, In control, Knowledg-eable, Energized, Challenged, Confident, Open minded, Productive, Passionate, Secure, Fulfilled, Relaxed, Liberated, Closer to loved ones, Affluent

CQ34. Thinking about your typical holiday/vacation, how do you feel when departing from your destination?
Base: All consumer respondents answering excluding DK's (36,145)

34

Emotions when back at home – detailed finding

⊙ Upon arrival back home, a feeling of security builds, alongside a lingering sense of fulfilment and relaxation.

| Booking | Arrival at destination | During the stay | Departing from destination | Back at home |

Chart (%):

Emotion	Value
Excited	9
In control	14
Knowledgeable	19
Energized	18
Challenged	6
Confident	13
Open minded	11
Productive	14
Passionate	6
Secure	29
Fulfilled	45
Relaxed	36
Liberated	12
Closer to loved ones	25
Affluent	10

CQ34. Thinking about your typical holiday/vacation, how do you feel when you are back at home?
Base: All consumer respondents answering excluding DK's (36,244)

Ipsos

35

Emotions when back at home – by life stage

⊙ Back at home, families feel the closest to their loved ones and the most energized, whilst retirees are the most likely to feel fulfilled.

Booking

Arrival at destination

During the stay

Departing from destination

Back at home

- Millennials
- Families
- No children
- Retirees

(%)

18%

22%

30%

Excited | In control | Knowledg-eable | Energized | Challenged | Confident | Open minded | Productive | Passionate | Secure | Fulfilled | Relaxed | Liberated | Closer to loved ones | Affluent

CQ34. Thinking about your typical holiday/vacation, how do you feel when you are back at home?
Base: All consumer respondents answering excluding DK's (36,244)

Ipsos

36

Emotions of vacation – by countries

⊙ Japanese travelers tend to be the most excited leading up to the vacation, whilst Brazilians report feeling the most fulfilled following their trip.

	Booking	Arrival at destination	During the stay	Departing from destination	Back at home
Top emotion	Excited 54%	Excited 55%	Relaxed 45%	Fulfilled 47%	Fulfilled 45%
Top Countries	Japan 77%	Japan 74%	UK & Ireland 60%	Brazil 61%	Brazil 61%
	Brazil 68%	Australia 72%	Germany 57%	Argentina & Greece 57%	United States (US) 51%
	Australia 66%	United States (US) 69%	Austria 55%	Indonesia & Portugal 56%	Italy 50%
Bottom Countries	Indonesia 32%	Germany & France 34%	Brazil 39%	Turkey 35%	China 36%
	Thailand 31%	Austria 33%	Japan & Portugal 37%	Thailand 31%	Thailand 31%
	Russia 26%	Russia 32%	Turkey 35%	France 29%	Turkey 27%

CQ34. Thinking about your typical holiday/vacation, how do you feel at each stage of your trip?
Base: All consumer respondents answering excluding DK's (c37,000)

37

Emotions of vacation – by gender

⊙ Women tend to feel more excited and energized across the journey, and men report more feelings of confidence and control.

Significantly higher % among…

	♀ Females		♂ Males	
Booking	Excited	60%	Knowledgeable	27%
	Energized	27%	Confident	23%
Arrival	Excited	60%	Relaxed	26%
	Energized	37%	Confident	19%
During the stay	Excited	34%	Secure	16%
	Energized	28%	In control	14%
Departing	Fulfilled	48%	In control	22%
	Closer to loved ones	22%	Secure	20%
Back at home	Fulfilled	46%	In control	15%
	Closer to loved ones	27%	Confident	15%

CQ34. Thinking about your typical holiday/vacation, how do you feel at each stage of your trip?
Base: All consumer respondents answering excluding DK's (c37,000)

38

Ipsos

Emotions of vacation – by vacation type

⊙ Those who tend to go on city and cultural trips are more likely to feel knowledgeable throughout the vacation journey.

Significantly more likely than average to feel…	Sun, beach/sea		City and cultural		Activity and adventure		Back to nature		Health and wellbeing	
Booking	Confident	**23%**	Knowledge-able	**27%**	Open minded	**25%**	Secure	**16%**	Fulfilled	**23%**
Arrival at destination	Excited*	**53%**	Excited	**59%**	Energized	**38%**	Excited*	**50%**	Liberated	**35%**
During the stay	Relaxed	**55%**	Excited	**36%**	Energized	**30%**	Relaxed*	**45%**	Liberated	**35%**
Departing from destination	Relaxed	**34%**	Fulfilled	**49%**	Fulfilled*	**47%**	Productive	**13%**	Affluent	**16%**
Back at home	Energized	**23%**	Fulfilled	**48%**	Fulfilled*	**45%**	Affluent	**14%**	Secure	**41%**

*NB. Where no emotion is significantly higher than average, highest scoring emotion is presented

CQ34. Thinking about your typical holiday/vacation, how do you feel at each stage of your trip?
Base: All consumer respondents answering excluding DK's (c37,000)

39

Hoteliers' principal objective – by proportion of returning guests

⊙ Hotels that have more returning guests are more likely to cater to the excited feeling at the booking stage.

Proportion of guests that return to a hotel...

76-100% : 8

51-75% : 17

26-50% : 35

0-25% : 38

Mean: 37% return guests
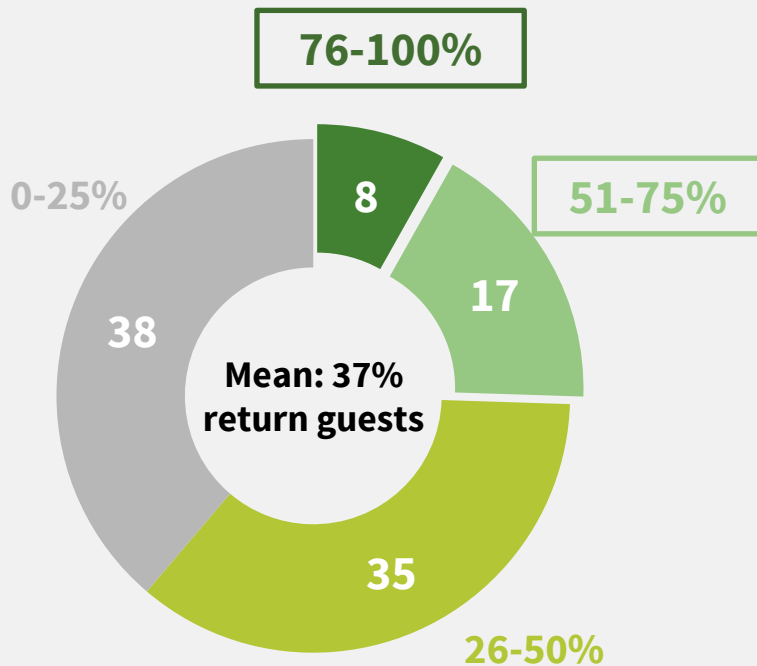
Hoteliers are more likely to…	51-75% return guests		76-100% return guests	
Booking			Make guests feel the vacation has already begun	20%
Lead up to stay	Introduce guests to the hotel	33%	Actively contact guests to build excitement	17%
			Begin building a relationship	34%
During the stay	Go 'above and beyond' to offer an exceptional customer service experience	54%		
After guests leave	Build a lasting relationship	51%		

BQ38. What proportion of your guests have returned to your hotel/property for another stay?
Base: All business respondents answering (14,083)

40

Post Travel Syndrome

Travel leads to more travel and changes to daily life

◎ Two in three travelers say they have planned more vacations as a result of a vacation

◎ Vacations are most likely to elicit lifestyle changes amongst millennials

◎ The focus for hoteliers once guests have left is on encouraging reviews and recommendations

Summary

Travelers catch the travel bug even if they feel fulfilled upon returning home

The travel bug is the main lasting post-vacation impact, as two in three travelers say that they have been prompted to plan a vacation on returning home from a trip. This is most evident amongst travelers from Brazil, UK and Australia and slightly less noticeable for Asian countries. Those on city and cultural trips are more likely than average to plan more vacations.

Local foods and delicacies come home with travelers

Around four in 10 travelers say that they have introduced new foods/recipes that they first tried on a vacation into their regular diet as a result of a trip. This is particularly evident amongst those on city and cultural trips and more pronounced amongst Western travelers, females, retirees and those with no children, who perhaps have more disposable income. Despite the lasting impact of food on travelers, few hotels take the extra step in offering a local staple gift, such as a bottle of wine from the local area, to guests as they leave.

Enhance perspectives post vacation

Being more open minded and tolerant of others and learning something new also tops the list as a post-vacation change. This is most prominent among travelers from emerging markets (Thailand, Indonesia, Malaysia, Brazil and Mexico), travelers who tend to go on activity and adventure trips, and solo travelers.

Vacations leave more of a lasting impact on millennials

Millennials make the most lifestyle changes post vacation, but that declines towards later life stages. The post-travel impact shows that millennials tend to be more aspirational and perhaps idealistic, as

nearly half say that a vacation has made them more open minded and tolerant of others. Post travel they are also more likely to appreciate and explore cities in their own country, to be inspired to learn something new, or to start a new relationship than other life stages.

Families unsurprisingly see a more notable impact on relationship building as a result of a vacation, whilst retirees are more adventurous in the kitchen.

Online reviews remain key for hoteliers

After guests leave, hoteliers' main objective is to encourage online reviews and recommendations to family and friends. This coincides with travelers' urge to plan more vacations, making it ever more important as a tool to attract new guests.

Some hoteliers are taking further steps to help travelers create more lasting memories of the vacation – two in five thank guests for their stay, but a far smaller minority help guests feel they are still connected to their vacation. The ability to do so will not only help shape better online reviews and word-of-mouth recommendation, but also aid the hotels to stand out in the plethora of choices.

Build a lasting relationship for more return guests

Hoteliers who are more likely to see an above average proportion of return guests tend make building relationships with guests a main objective. Other activities that could see an improvement in this return rate tend to have a lower priority at the moment, such as encouraging guests to come back for another visit, and tailoring future offers based on the customer's personal information.

Hoteliers' principal objectives post departure
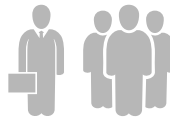
⊙ Online reviews are important for holiday planning*; more could be done to tap into post-holiday planning.

Post holiday

66% (#1) — **Planned more vacations**

38% (#3) — **Introduce foods/recipes**

18% (#9) — **Taken up activity tried on vacation**

Hotels' principal objectives…
(%)

After guests leave

57	44	28	7	6	3
Encourage online review & recommend to family & friends	Build a lasting relationship	Encourage guests to come back	Tailor future offers based on personal information	Leave a gift the night before check-out	Introduce guests to sister hotels

Globally, hoteliers report that **37%** Of guests are return guests

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43

Hoteliers' principal objective after guests leave

⊙ The majority of hoteliers focus on encouraging guests to write online reviews, particularly hostels. Resorts are more likely to encourage return visits.

After guests leave

(%)

57
Hostels = 62%
Inn/B&B = 59%

Encourage guests to write an online review & recommend to family & friends

44
Build a lasting relationship with the guest

39
Thank guests for their stay

28
Resorts = 33%
Hotels = 32%

Encourage guests to come back for another visit

7
Help guests to feel they are still connected to their vacation/ the destination

7
Hotels = 10%
Resorts = 8%

Tailor future offers based on customer's personal information

6
Leave a gift the night before check-out

3
Introduce guests to sister hotels

BQ36d After the guests have left, my hotel/property's principal objectives are to…
Base: All business respondents answering (14,083)

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Post-vacation lifestyle changes – detailed finding

⊙ Although travelers feel fulfilled after a trip, the majority plan more vacations

⊙ Nearly half say they become more open-minded and tolerant of others

Back at home ➜ (%)

Fulfilled 45%

Other mentions

Started a new relationship	8%
Donated to charity	7%
Changed my career	6%
Moved abroad	6%
Got married/engaged	5%
Moved to another part of country	4%
Started a family	4%
Got divorced or separated	1%

66 ● **Planned more vacations**

Became more open-minded and tolerant of others

45 **Introduced foods/recipes first ate on vacation into my diet**

Learnt something new e.g. a language/new skill

Appreciated and explored my own cities more

38 **37** **Became more environmentally friendly**

34

31 **24** **23**

Pampered and treated myself more

Focused more on my relationships with friends & family e.g. prioritising over work

18

Took up an activity that I first tried on holiday/vacation

13

Became more spiritually/religiously connected

CQ35. Thinking about all the holidays/vacations you have been on in your lifetime, have any of them prompted you to do any of the following?
Base: All consumer respondents (39,721)

45

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Post-vacation lifestyle changes – by countries

⊙ Asian countries are more likely than others to become more open-minded and tolerant of others, and learn something new.

Planned more vacations	More open minded & tolerant of others	Introduced foods/ recipes into diet	Learnt something new	Appreciated & explored my own cities more	Become more environ-mentally friendly	Started a new relationship	Changed my career	Moved abroad	Got married/ engaged	Started a family

Top countries

Brazil 85	Indonesia 61	UK 61	Thailand 49	Mexico 50	Mexico, India 49	Thailand 18	Mexico 17	N. Zealand 13	Ireland 12	Malaysia 12
Australia 84	Malaysia 60	Ireland 57	Indonesia, Malaysia 48	Ireland 46	Thailand 44	S. Africa 16	N. Zealand 13	Ireland, Mexico 12	UK 10	Thailand 11

(%)

Bottom countries

Italy 51	France 36	Thailand, Indonesia 22	India, Turkey, France 29	Turkey, Japan 24	Germany 16	France 4	Japan, Italy, Russia 2	Italy, Russia 2	Russia, France, Japan 3	Japan 1
Thailand 50	Japan 23	Turkey 18	N. Zealand, Greece 25	France 17	Austria 14	Japan 3	Austria 1	Brazil 1		

CQ35. Thinking about all the holidays/vacations you have been on in your lifetime, have any of them prompted you to do any of the following?
Base: All consumer respondents (39,721)

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Post-vacation lifestyle changes – by life stage

⊙ Millennials tend to see a more aspirational vacation impact than other life stages, whereas retirees and those with no children are more likely to introduce new food into their diets.

Millennials

48% More open-minded & tolerant of others

42% Learn something new

38% Appreciate & explore own cities more

10% Start a new relationship
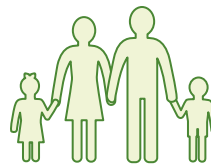
Families

31% Focus more on my relationships with friends & family e.g. prioritising over work

No Children

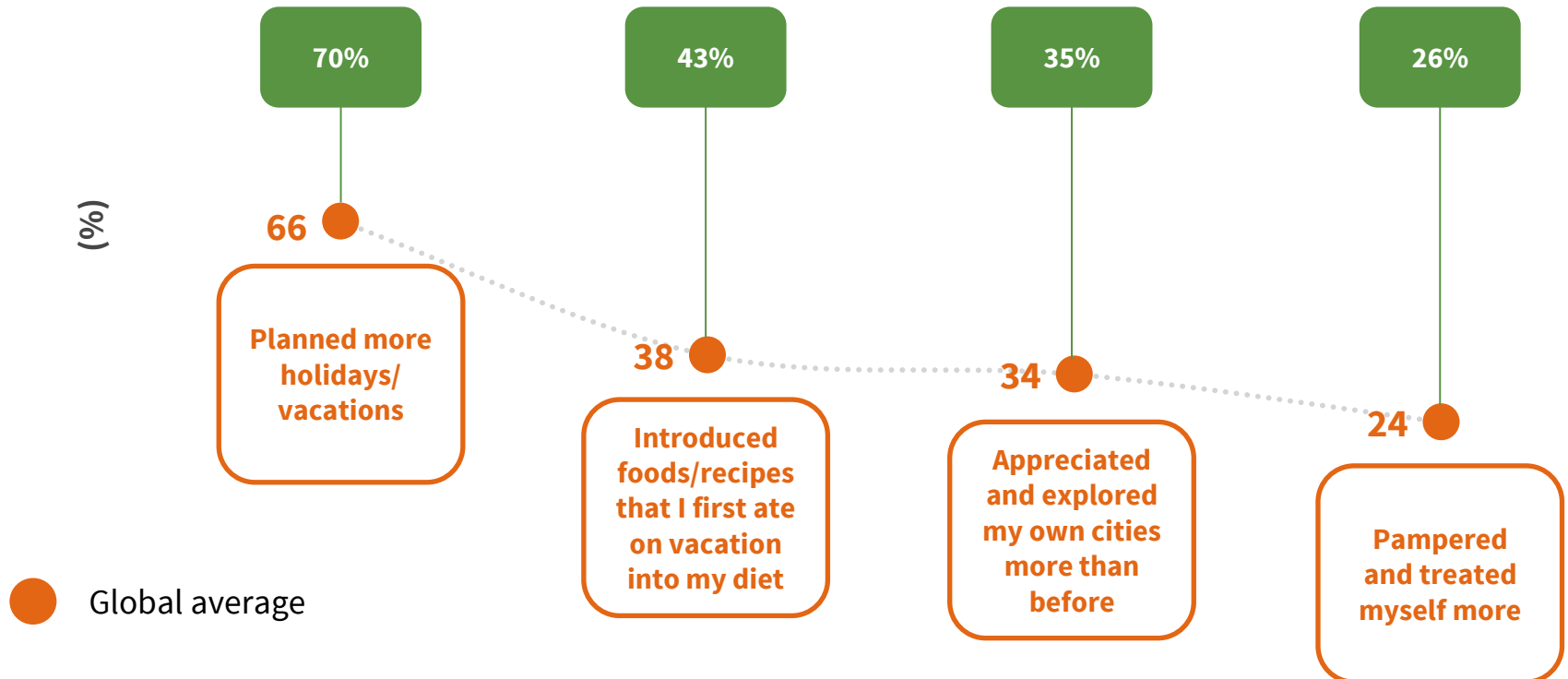**43%** Introduce foods/recipes first ate on vacation into diet

Retirees

43% Introduce foods/recipes first ate on vacation into my diet

9% Donate money to charity

CQ35. Thinking about all the holidays/vacations you have been on in your lifetime, have any of them prompted you to do any of the following?
Base: All consumer respondents (39,721)

Ipsos

Post-vacation lifestyle changes – by gender

⊙ Women are more likely than men to plan more vacations and introduce foods first tried on vacation into their regular diet.

Females are significantly more likely to…

(%)

| 70% | 43% | 35% | 26% |

66
Planned more holidays/ vacations

38
Introduced foods/recipes that I first ate on vacation into my diet

34
Appreciated and explored my own cities more than before

24
Pampered and treated myself more
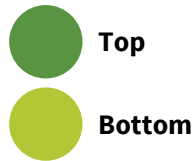
● Global average

Ipsos

Post-vacation lifestyle changes – by vacation type

⊙ Travelers who tend to go on health and wellbeing trips are the least likely to make any lifestyle changes after vacations.

● **Top**

● **Bottom**

	Global average	Sun, beach/sea	City and cultural	Activity and adventure	Back to nature	Health and wellbeing
Planned more vacations	66%	67%	68%	65%	60%	52%
Open-minded and tolerant of others	45%	42%	47%	49%	44%	29%
Introduced foods/recipes that I first ate on vacation into my diet	38%	37%	42%	37%	33%	31%
Learnt something new	37%	32%	42%	42%	33%	29%
Appreciated and explored my own cities more	34%	29%	38%	36%	31%	24%
More environmentally friendly	31%	29%	27%	34%	42%	26%
Pampered/treated myself more	24%	29%	21%	24%	21%	26%
Focus more on my relationships	23%	26%	20%	25%	26%	23%
Taken up an activity that I first tried on vacation	18%	19%	15%	24%	18%	16%
More spiritually/religiously connected	13%	11%	12%	14%	16%	14%

Post-vacation lifestyle changes – by travel companion

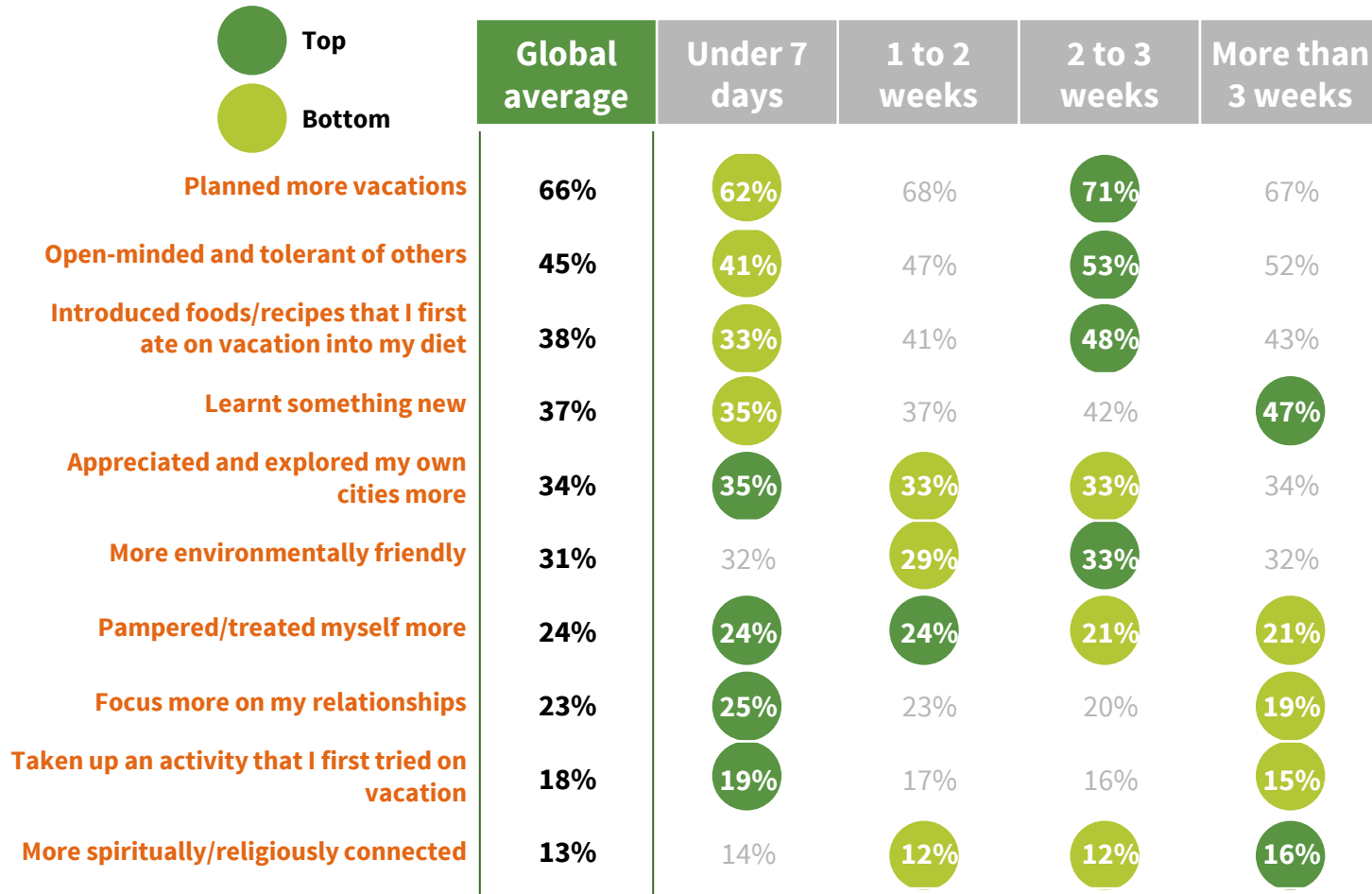⊙ Those who tend to travel as a couple are the most likely to plan more vacations as a result of a vacation.

	Global average	As a couple	As a family	Extended family	Friends	People I don't know	On my own
Planned more vacations	66%	70%	62%	64%	65%	57%	64%
Open-minded and tolerant of others	45%	46%	41%	51%	49%	47%	47%
Introduced foods/recipes that I first ate on vacation into my diet	38%	43%	37%	36%	33%	30%	35%
Learnt something new	37%	34%	34%	42%	43%	40%	46%
Appreciated and explored my own cities more	34%	34%	30%	37%	37%	28%	35%
More environmentally friendly	31%	29%	30%	40%	35%	38%	27%
Pampered/treated myself more	24%	24%	23%	28%	26%	18%	22%
Focus more on my relationships	23%	21%	28%	35%	21%	10%	13%
Taken up an activity that I first tried on vacation	18%	17%	18%	26%	19%	14%	17%
More spiritually/religiously connected	13%	11%	13%	18%	14%	21%	16%

● Top ● Bottom

CQ35. Thinking about all the holidays/vacations you have been on in your lifetime, have any of them prompted you to do any of the following?
Base: All consumer respondents (39,721)

50

Post-vacation lifestyle changes – by length of vacation

⊙ Those who take shorter breaks are more likely to appreciate their own cities more, pamper and treat themselves and focus more on their relationships.

	Global average	Under 7 days	1 to 2 weeks	2 to 3 weeks	More than 3 weeks
Top / Bottom					
Planned more vacations	66%	62%	68%	71%	67%
Open-minded and tolerant of others	45%	41%	47%	53%	52%
Introduced foods/recipes that I first ate on vacation into my diet	38%	33%	41%	48%	43%
Learnt something new	37%	35%	37%	42%	47%
Appreciated and explored my own cities more	34%	35%	33%	33%	34%
More environmentally friendly	31%	32%	29%	33%	32%
Pampered/treated myself more	24%	24%	24%	21%	21%
Focus more on my relationships	23%	25%	23%	20%	19%
Taken up an activity that I first tried on vacation	18%	19%	17%	16%	15%
More spiritually/religiously connected	13%	14%	12%	12%	16%

CQ35. Thinking about all the holidays/vacations you have been on in your lifetime, have any of them prompted you to do any of the following?
Base: All consumer respondents (39,721)

51

Appendix

Travelers & hoteliers profile

Consumer survey – sample size

		W2 2014			W1 2014		
		Total	Pop-up	Panel	Total	Pop-up	Panel
	Total	39721	37024	2697	50637	48352	2285
Africa	Morocco	19	19		23	23	0
	South Africa	702	201	501	561	61	500
	Other Africa	97	97		116	116	0
Asia	China	549	329	220	1017	1017	0
	India	704	604	100	618	518	100
	Indonesia	521	156	365	524	169	355
	Japan	1963	1963		2052	2052	0
	Malaysia	540	170	370	519	289	230
	Thailand	515	125	390	522	222	300
	Other Asia	345	345		405	405	0
Austral-asia	Australia	1841	1841		2114	2114	0
	New Zealand	673	423	250	694	444	250
Europe	Austria	263	263		227	227	0
	France	2852	2852		3042	3042	0
	Germany	945	945		1265	1265	0
	Greece	838	738	100	603	503	100
	Ireland	619	619		468	468	0
	Italy	4053	4053		4966	4966	0
	Portugal	310	310		304	304	0
	Russia	2999	2929	70	2233	2133	100
	Spain	1504	1504		1864	1864	0
	Switzerland	494	494		627	627	0
	Turkey	679	428	251	558	308	250
	United Kingdom (UK)	2606	2606		4327	4327	0
	Other West Europe	817	817		1215	1215	0
	Other East Europe	665	665		749	749	0

		W2 2014			W1 2014		
		Total	Pop-up	Panel	Total	Pop-up	Panel
	Total	39721	37024	2697	50637	48352	2285
Middle East	Egypt	21	21		23	23	0
	Israel	92	92		180	180	0
	Jordan	2	2		9	9	0
	United Arab Emirates (UAE)	69	69		89	89	0
	Other Middle East	92	92		111	111	0
North America	Canada	1819	1819		3209	3209	0
	Caribbean	42	42		86	86	0
	United States (US)	4665	4665		9595	9595	0
LATAM	Argentina	1198	1118	80	1692	1592	100
	Brazil	2651	2651		2956	2956	0
	Mexico	520	520		459	459	0
	Other South America	437	437		615	615	0

		W2 2014			W1 2014		
Region	Africa	818	317	501	700	200	500
	Asia	5137	3692	1445	5657	4672	985
	Australasia	2514	2264	250	2808	2558	250
	Europe	19644	19223	421	22448	21998	450
	Middle East	276	276	0	412	412	0
	North America	6526	6526	0	12890	12890	0
	LATAM	4806	4726	80	5722	5622	100

Business survey – sample size

		W2 2014	W1 2014
	Total	**14083**	**10370**
Africa	Morocco	160	111
	South Africa	385	288
	Other Africa	344	180
Asia	China	80	101
	India	496	272
	Indonesia	166	97
	Japan	158	194
	Malaysia	42	28
	Thailand	250	155
	Other Asia	490	295
Austral-asia	Australia	510	411
	New Zealand	264	221
Europe	Austria	127	116
	France	1062	916
	Germany	212	240
	Greece	494	334
	Ireland	142	90
	Italy	2241	1499
	Portugal	157	102
	Russia	259	110
	Spain	653	524
	Switzerland	94	109
	Turkey	211	152
	United Kingdom (UK)	842	888
	Other West Europe	294	177
	Other East Europe	380	238

		W2 2014	W1 2014
Middle East	Egypt	27	16
	Israel	20	12
	Jordan	6	6
	United Arab Emirates (UAE)	21	7
	Other Middle East	34	26
North America	Canada	447	317
	Caribbean	220	117
	United States (US)	1282	989
LATAM	Argentina	257	205
	Brazil	429	248
	Mexico	235	164
	Other South America	592	415

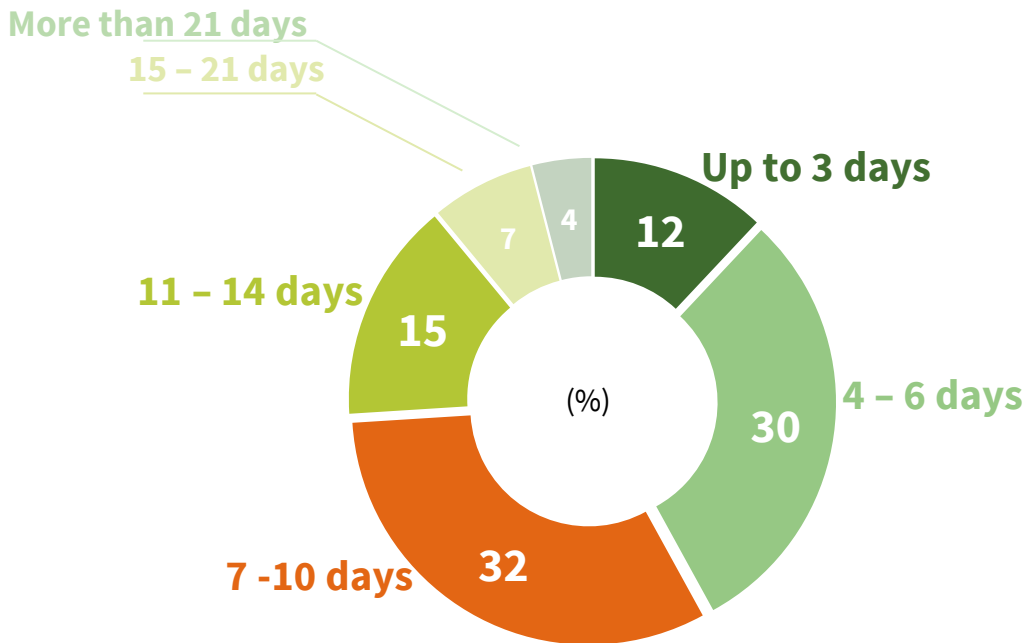|		W2 2014	W1 2014
Region	Africa	889	579
	Asia	1682	1142
	Australasia	774	632
	Europe	7169	5495
	Middle East	108	67
	North America	1949	1423
	LATAM	1513	1032

Who do travelers go on vacation with?

⊙ Most travelers tend to travel as a couple or as a family.
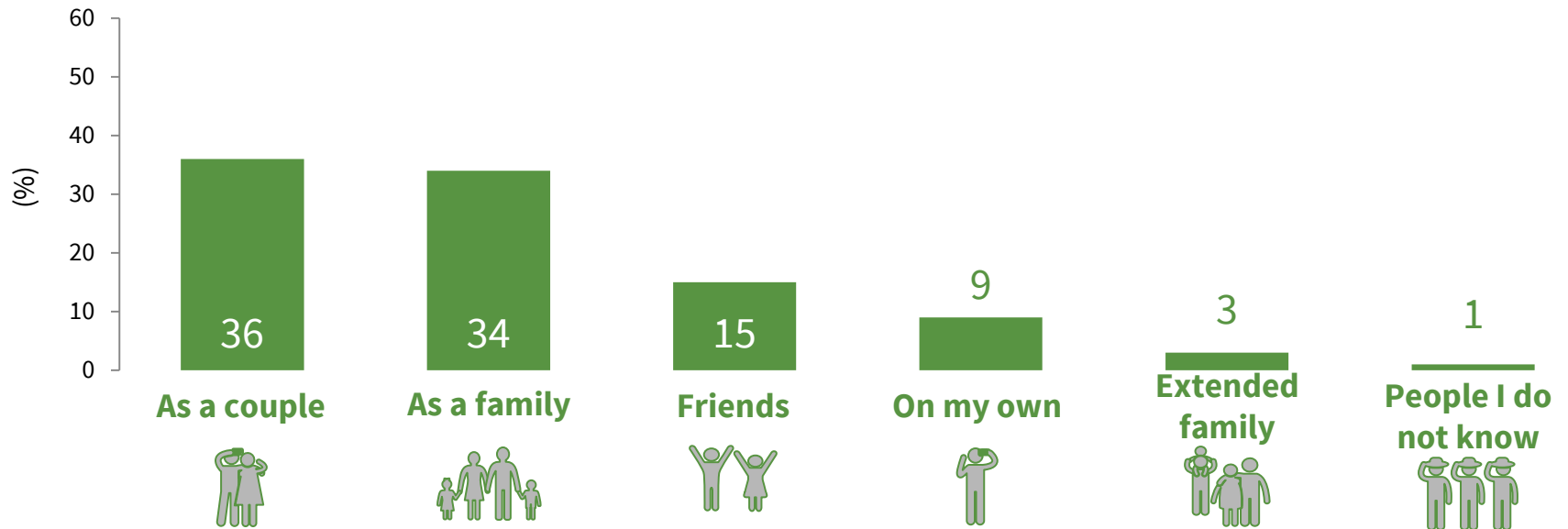
Typical vacation duration

⊙ The typical vacation length is between 4 to 10 days. Millennials tend to take shorter breaks.

More than 21 days
15 – 21 days

Up to 3 days
12

4 – 6 days
30

7 -10 days
32

11 – 14 days
15

7
4

(%)

(%)	Millennials	Families	No children	Retirees
Up to 3 days	14	12	9	5
4 – 6 days	**34**	32	26	18
7 – 10 days	31	**33**	**34**	**32**
11 – 14 days	12	15	18	21
15 – 21 days	5	6	9	14
More than 21 days	4	2	4	10

Less than 7 days	42%
7-14 days	**47%**
Over 2 weeks	12%

Typical vacation types

⊙ City and cultural trips are the most popular type of trips, followed by sun, beach/sea.

Other
Health and wellbeing
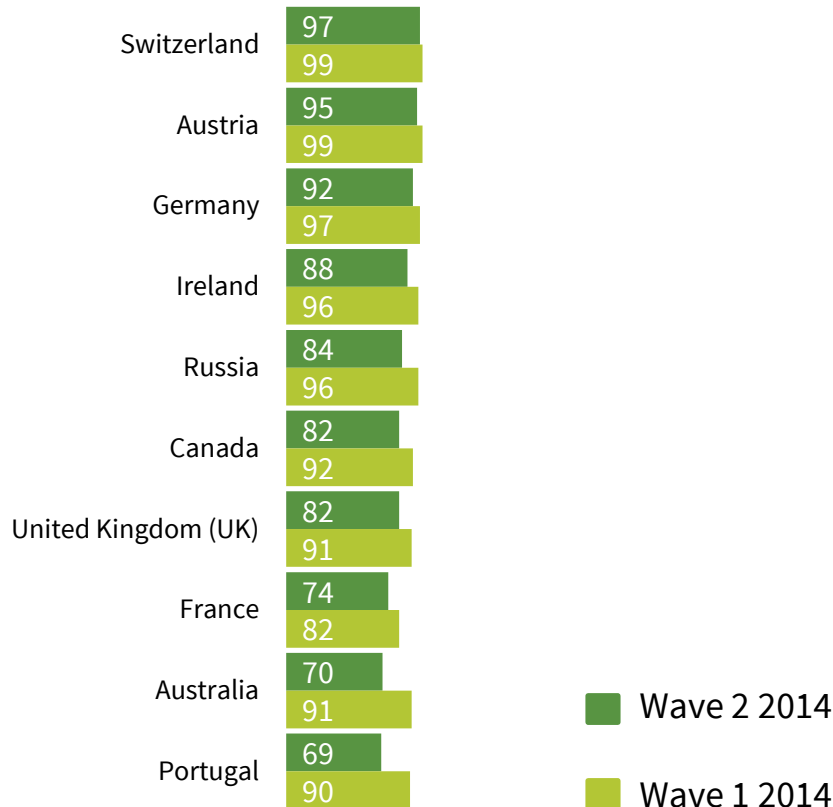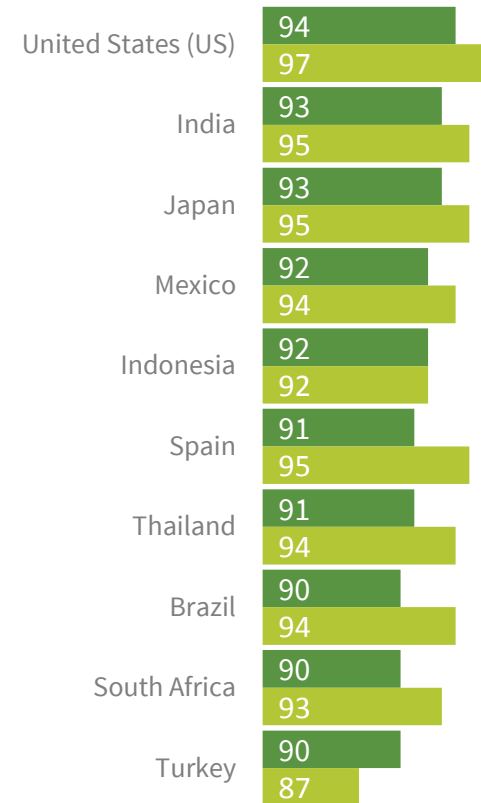**Back to nature**

City and culture 35
Sun, beach/sea 28
Activity and adventure 15
14
4
4

(%)

	Top	Bottom
City and culture	51% Portugal	18% China
Sun, beach/sea	43% Thailand	14% Japan
Activity and adventure	21% India	5% China
Back to nature	36% China	5% Russia

Ipsos
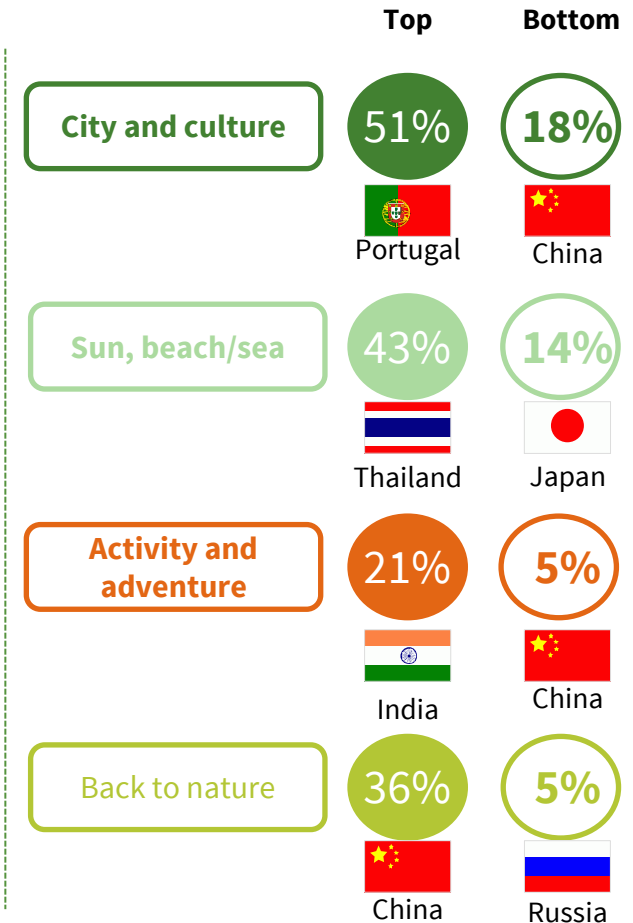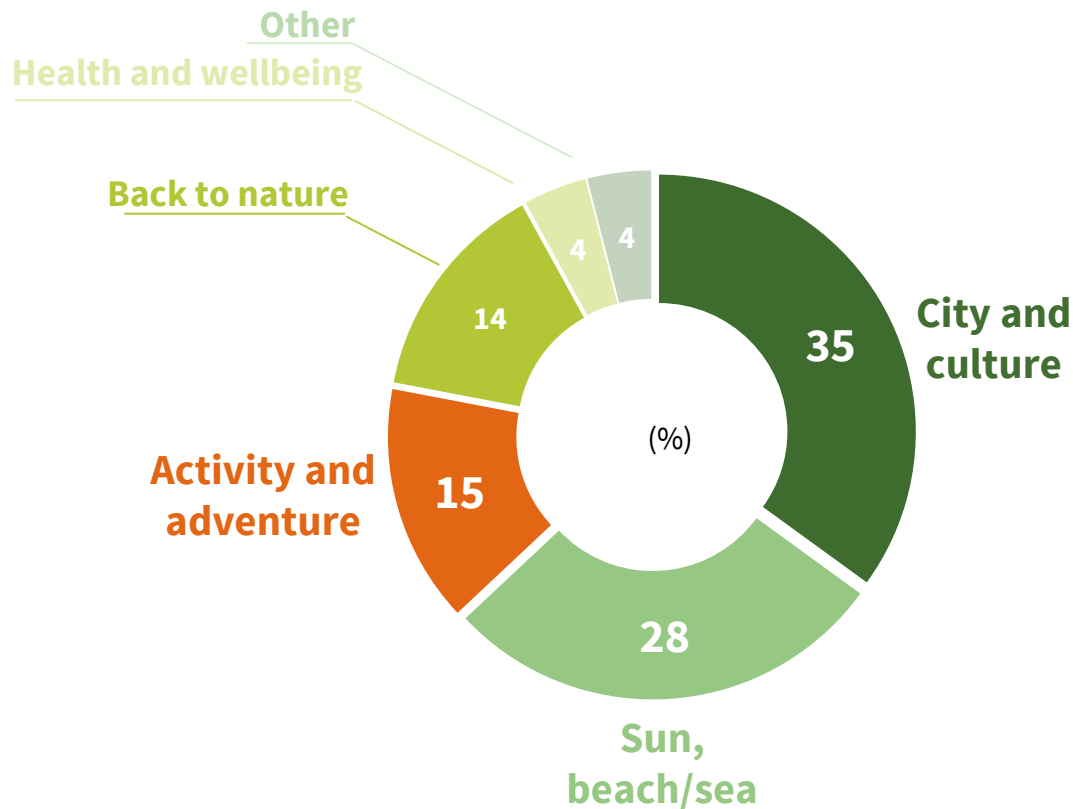
Traveler type – by countries

⊙ European travelers top the list for international trips in the past 12 months.
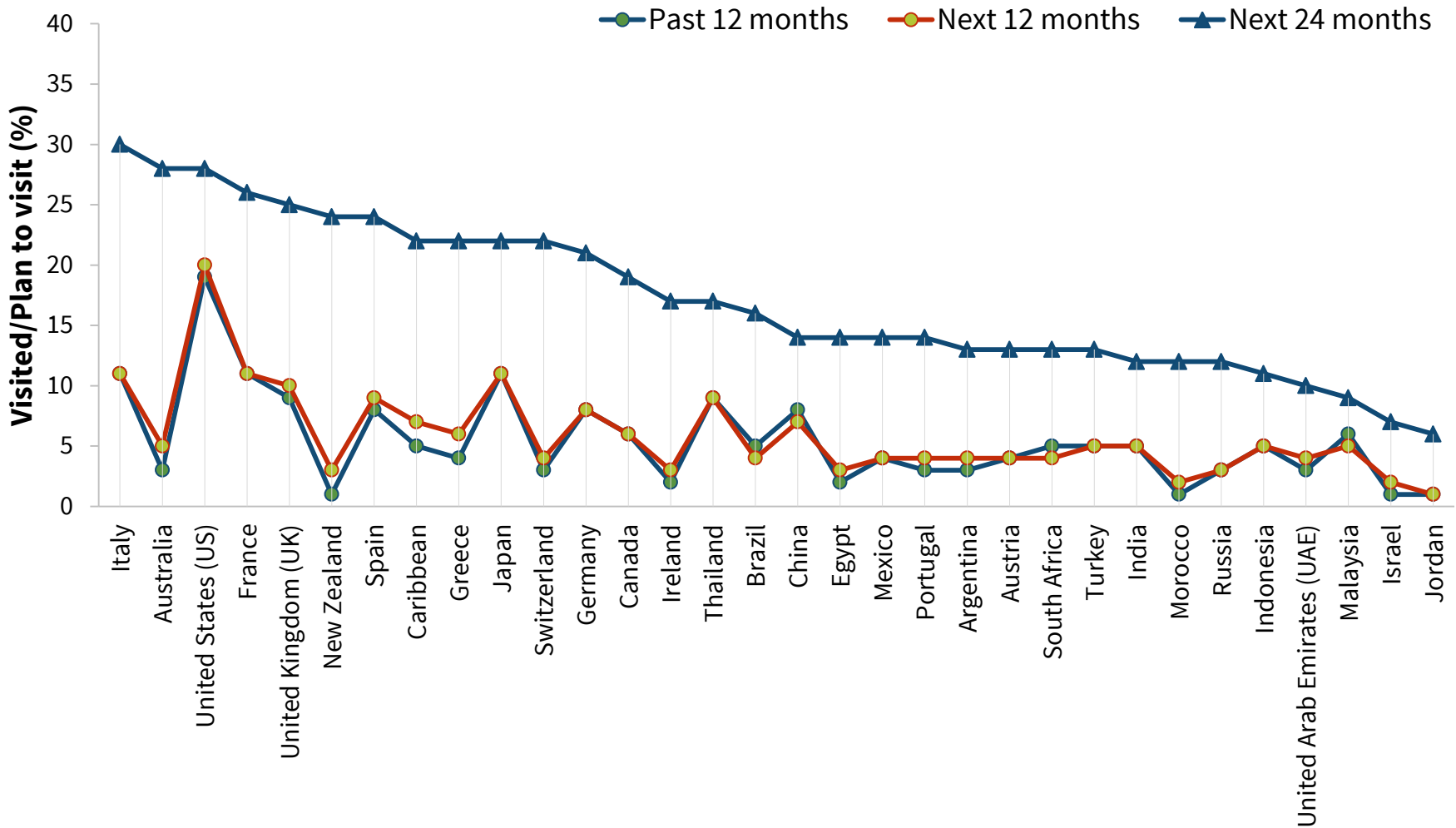
International Leisure % *(Top 10)*

Country	Wave 2 2014	Wave 1 2014
Switzerland	97	99
Austria	95	99
Germany	92	97
Ireland	88	96
Russia	84	96
Canada	82	92
United Kingdom (UK)	82	91
France	74	82
Australia	70	91
Portugal	69	90

Domestic Leisure % *(Top 10)*

Country	Wave 2 2014	Wave 1 2014
United States (US)	94	97
India	93	95
Japan	93	95
Mexico	92	94
Indonesia	92	92
Spain	91	95
Thailand	91	94
Brazil	90	94
South Africa	90	93
Turkey	90	87

■ Wave 2 2014

■ Wave 1 2014

CQ5. How many trips where you have stayed away for one night or more have you taken in the last 12 months?
Base: All consumer respondents answering (39,721)

Ipsos

58

Top destinations for international travelers

⊙ Italy, Australia and US are the top dream destinations.

CQ7. Which countries have you visited in the last 12 months, are you planning to visit in the next 12 months and would love to visit in the next 24 months?
Base: All consumer respondents answering (39,721)

Regions people have visited in the last year

⊙ Europe and Asia top the list for most-visited destinations in the past 12 months.
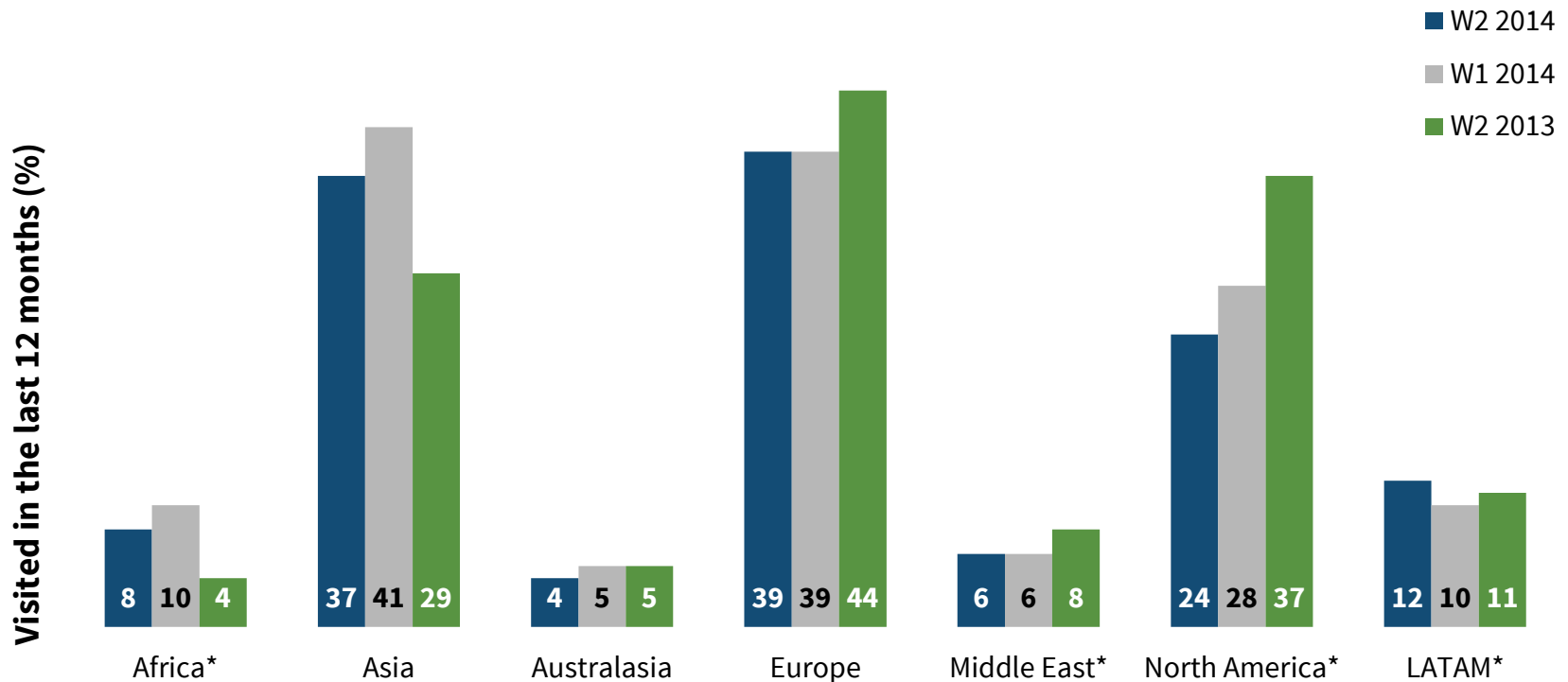
Visited in the last 12 months (%)

Legend:
- ■ W2 2014
- ■ W1 2014
- ■ W2 2013

	Africa*	Asia	Australasia	Europe	Middle East*	North America*	LATAM*
W2 2014	8	37	4	39	6	24	12
W1 2014	10	41	5	39	6	28	10
W2 2013	4	29	5	44	8	37	11

*Prior to W2 2014, Egypt was grouped into Africa, now grouped into the Middle East
*Prior to W2 2014, Mexico was included in North America, now grouped into LATAM

CQ7. Which countries have you visited in the last 12 months?
Base: All consumer respondents answering ; W2 2014 (39,721), W1 2014 (50,637), W2 2013 (19,687)
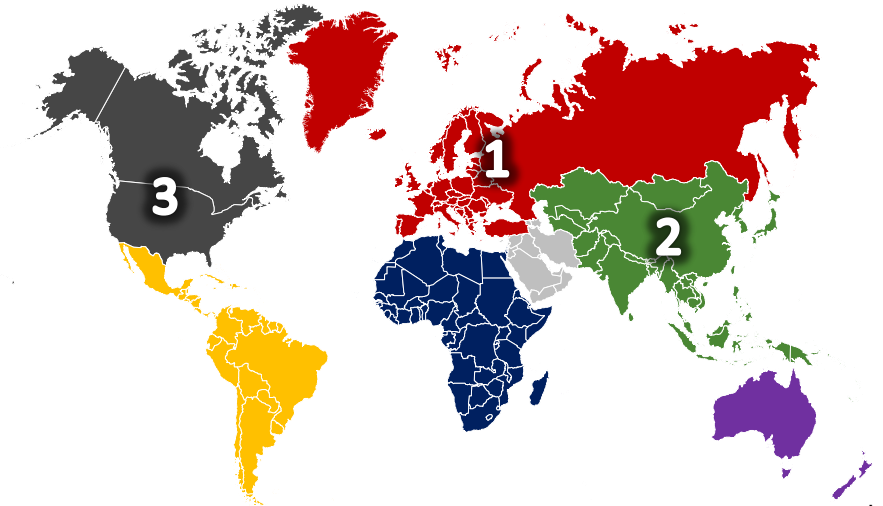
60

Where people are planning to visit

- In both the previous and current waves of TripBarometer, travelers plan to visit Europe, which is also the 'dream' destination. Asia and North America also remain popular destinations.

Next 12 months
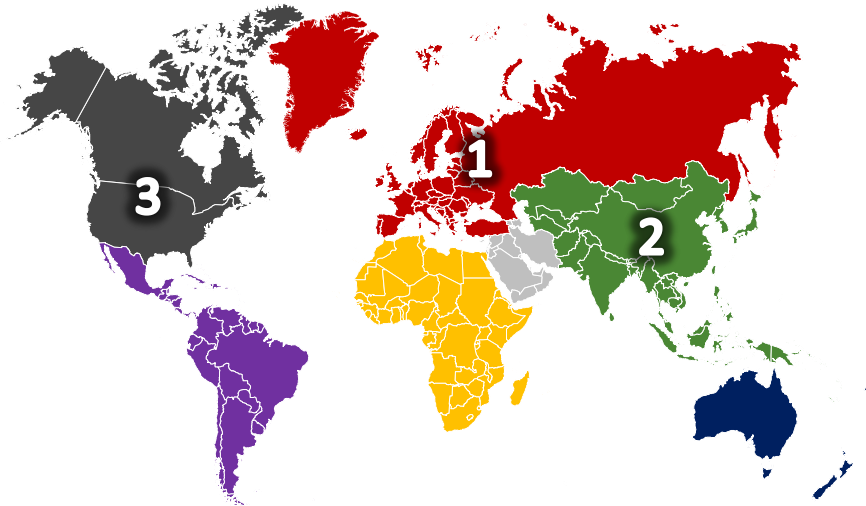
		W2 2014	W1 2014	W2 2013*
Europe	●	1	1	1
Asia	●	2	2	3
North America*	●	3	3	2
LATAM*	●	4	4	7
Africa*	●	5	5	4
Middle East*	●	**5**	**6**	**6**
Australasia	●	7	7	5

Next 24 months

		W2 2014	W1 2014	W2 2013*
Europe	●	1	1	1
Asia	●	2	2	2
North America*	●	3	3	3
Australasia	●	4	4	3
LATAM*	●	5	5	6
Middle East*	●	6	6	7
Africa*	●	7	7	5

*Prior to W2 2014, Egypt was grouped into Africa, now grouped into the Middle East
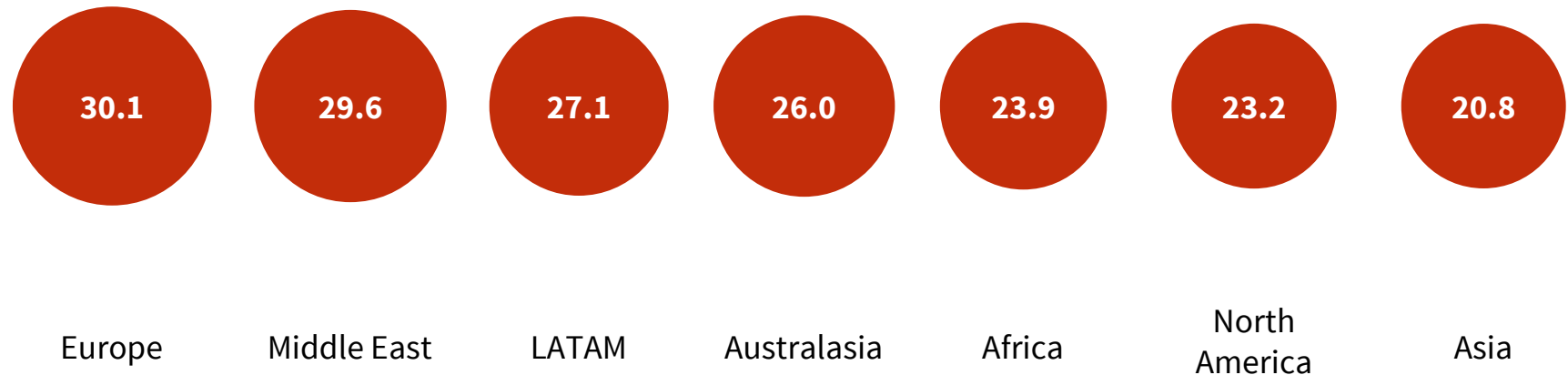*Prior to W2 2014, Mexico was included in North America, now grouped into LATAM

Number of days of annual leave

⊙ Europeans have the most annual leave overall, whilst Asians have the least.

Globally, travelers have an average of **24.6** days of annual leave

30.1	29.6	27.1	26.0	23.9	23.2	20.8
Europe	Middle East	LATAM	Australasia	Africa	North America	Asia

Proportion of return guests

⊙ Hotels, resorts and budget hotels see a higher rate of repeat guests.

On average, hotels see **37%** of guests returning to their property

Top 3 property types
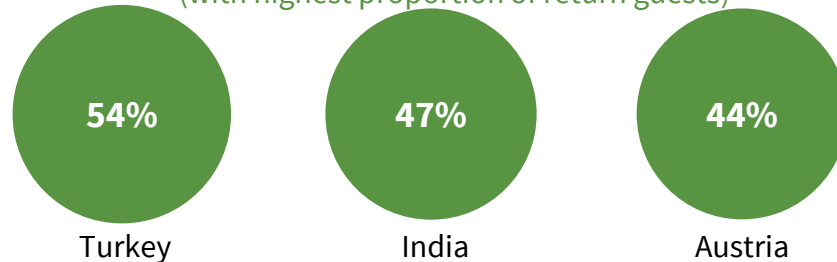(with highest proportion of return guests)

42%	**40%**	**40%**
Hotel	Resort	Economy/ budget
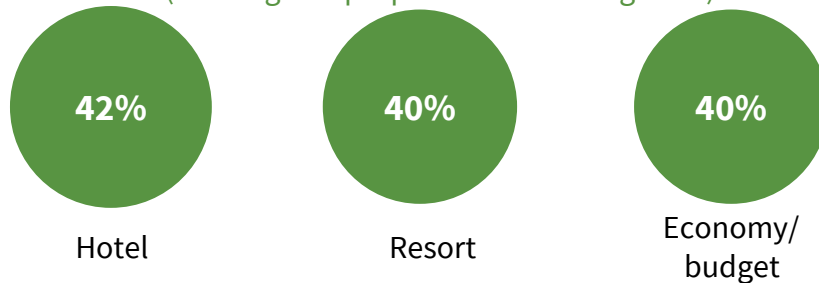
Bottom 3 property types
(with lowest proportion of return guests)

36%	**35%**	**34%**
Hostel	Boutique	Inn/B&B

Top 3 countries
(with highest proportion of return guests)

54%	**47%**	**44%**
Turkey	India	Austria

Bottom 3 countries
(with lowest proportion of return guests)

30%	**24%**	**24%**
Portugal	New Zealand	Morocco

BQ38. What proportion of your guests have returned to your hotel/property for another stay?
Base: All business respondents answering , excluding DK's (10,666)

63
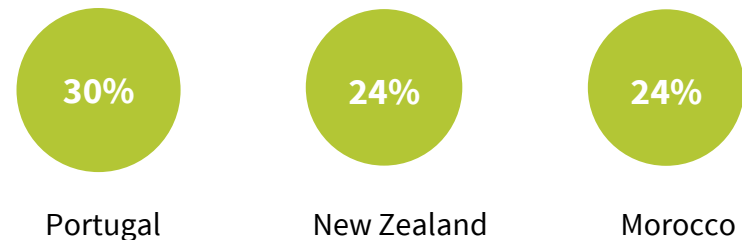
Profile of businesses

81% single-property businesses
49% in mid-range category

Type of property (5%+ shown)

Hotel	32
Bed & Breakfast	25
Inn	9
Resort	8
Holiday rentals	7
Serviced apartments	5
Hostel	5
Lodge	5

90% properties are independent/ owned

No of rooms in property (%)

1 to 5	6 to 10	11 to 25	26 to 50	51 to 100	101 to 250	251 to 500	500+
26	22	23	11	8	6	2	1

Owner	Manager (Marketing, Sales, PR, etc)	General Manager	Director	President
55	21	15	8	1

Functions of responsibility (%)

Day-to-day management	79
Marketing	73
Sales / Commercial	66
Public Relations	65
Administration	62
Social Media	60
Finance	53
HR / Personnel	50
Other	18

Base: All business respondents answering (14,083)

For more information

Please visit www.tripadvisor.com/tripbarometer

For any queries, please contact tripbarometer@ipsos.com