



# TripBarometer 2017/18

Global Report



# Introducing TripBarometer 2017/18

A unique global study uncovering global travel trends



**23,198**

Participants



**33**

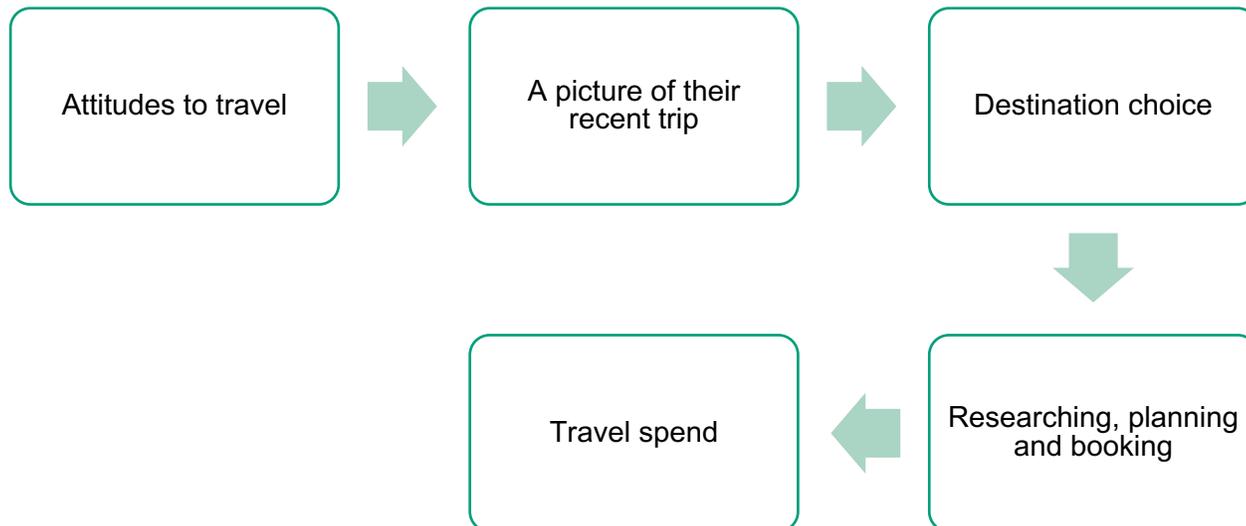
Markets worldwide



**18 min**

Questionnaire

## Questionnaire flow



## 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?

## Surprising facts

- 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**, particular 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**





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How do travelers approach planning their trip?

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

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What influences accommodation choice?

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How do travelers budget their trip?

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What influences attraction choice?

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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

## Online Reviews

**86%**

of travelers will not book accommodation without reading reviews first

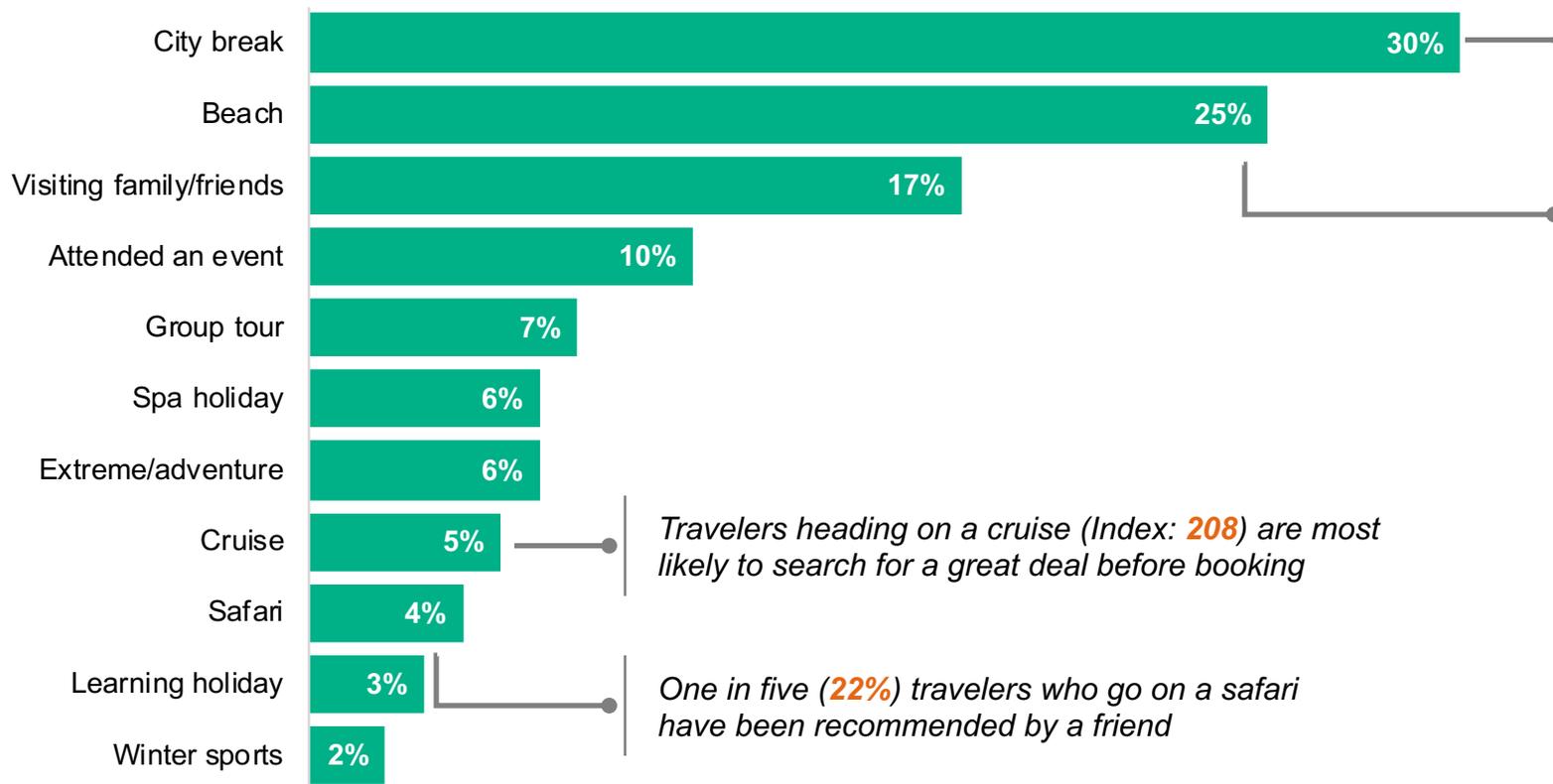
**89%**

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

# 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

## Which of the following best describes your most recent trip?



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

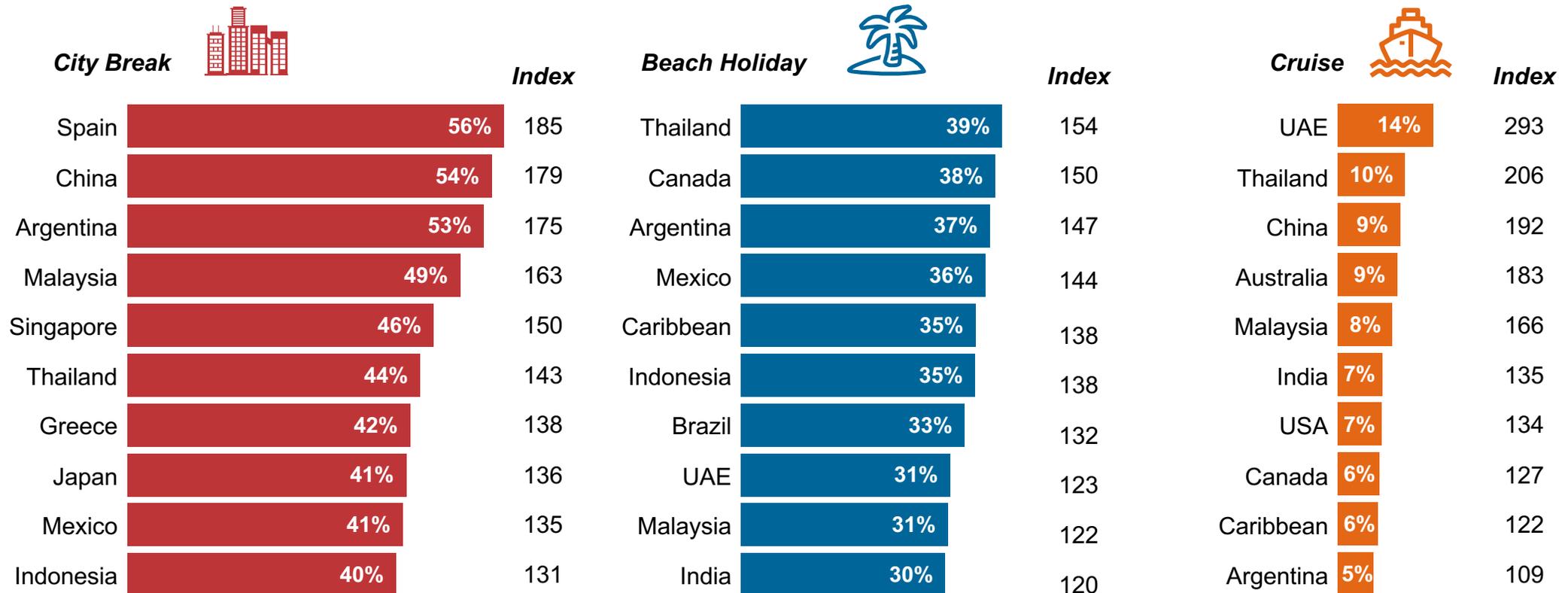
One in five (**22%**) travelers who go on a safari have been recommended by a friend

\*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)



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

\*Only showing countries with more than 100 completes

# 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**



Q14/Q16/Q21a Which of the following sources of information did you use for inspiration/destination research/accommodation research?  
 Q14b/Q16b/Q21b/Q28. And which was the most influential source when searching for inspiration/researching your destination/researching accommodation/researching attractions?

# 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)

Inspiration			Destination			Accommodation			Attractions*		
		<i>Index</i>			<i>Index</i>			<i>Index</i>			<i>Index</i>
Argentina	60%	129	Argentina	65%	118	Argentina	54%	123	Ireland	37%	136
Caribbean	52%	111	Canada	64%	116	Australia	52%	118	India	36%	131
Malaysia	51%	109	Australia	62%	112	Brazil	49%	112	Caribbean	32%	117
India	51%	109	US	58%	106	UK	49%	111	Brazil	31%	113
Spain	50%	107	Ireland	58%	106	Canada	49%	111	Australia	30%	111
Canada	49%	105	Brazil	57%	104	Spain	47%	108	US	29%	105
Mexico	49%	105	Spain	56%	103	Italy	45%	103	Argentina	29%	104
Portugal	47%	100	UK	56%	103	Ireland	45%	102	Canada	29%	104
Singapore	47%	100	Italy	55%	100	India	45%	102	UK	28%	103
Brazil	46%	99	India	55%	100	US	45%	102	Portugal	28%	101

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



## 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



## 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



## 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



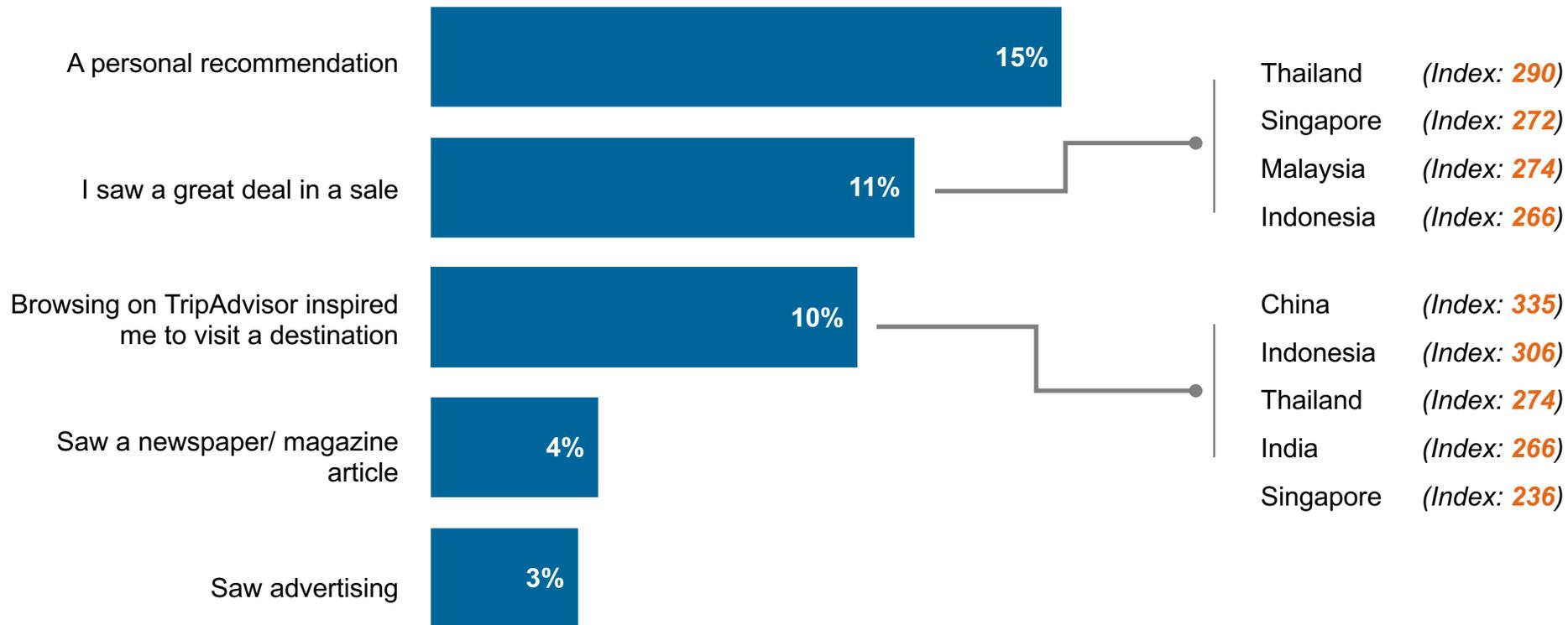
# How do travelers approach planning their trip?



# 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

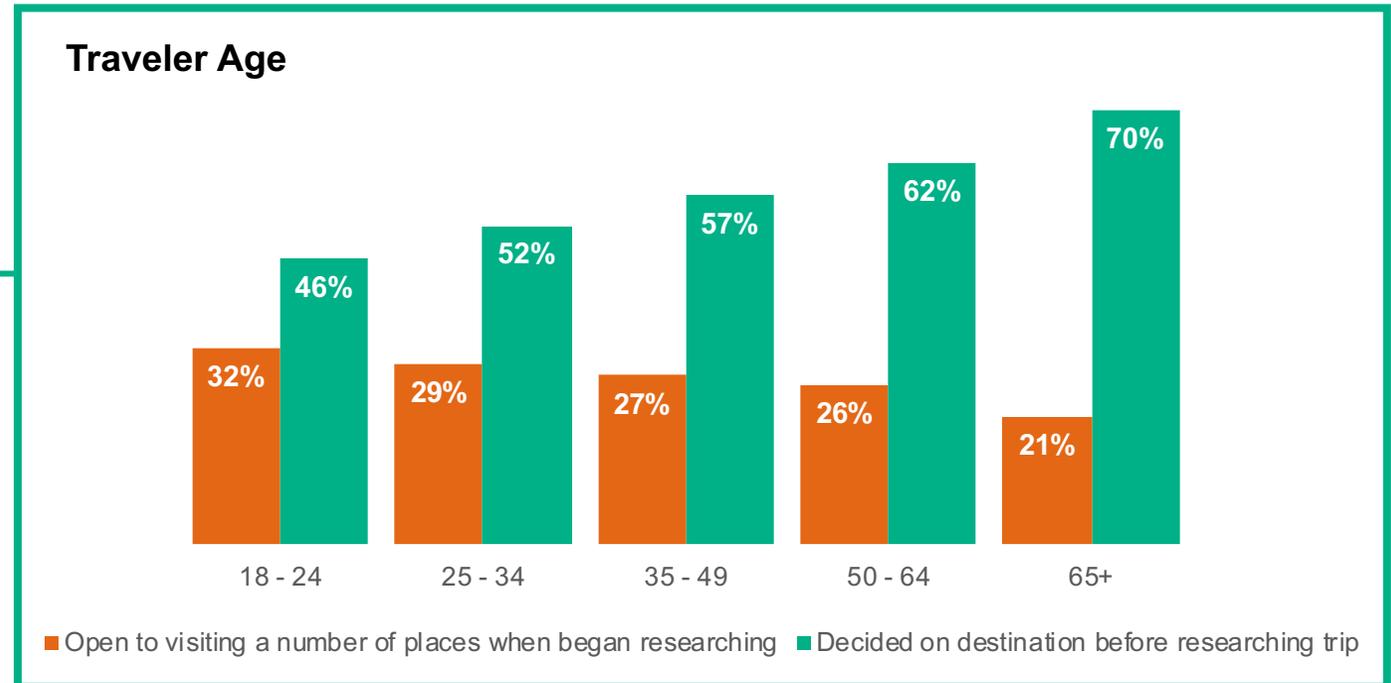
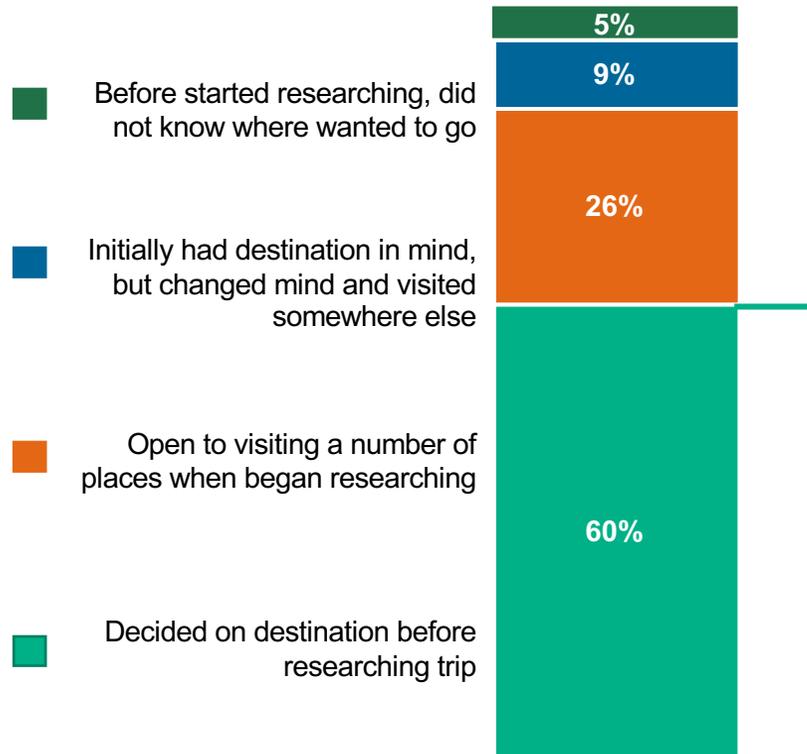
## What prompted you to start thinking about your most recent trip?



# 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

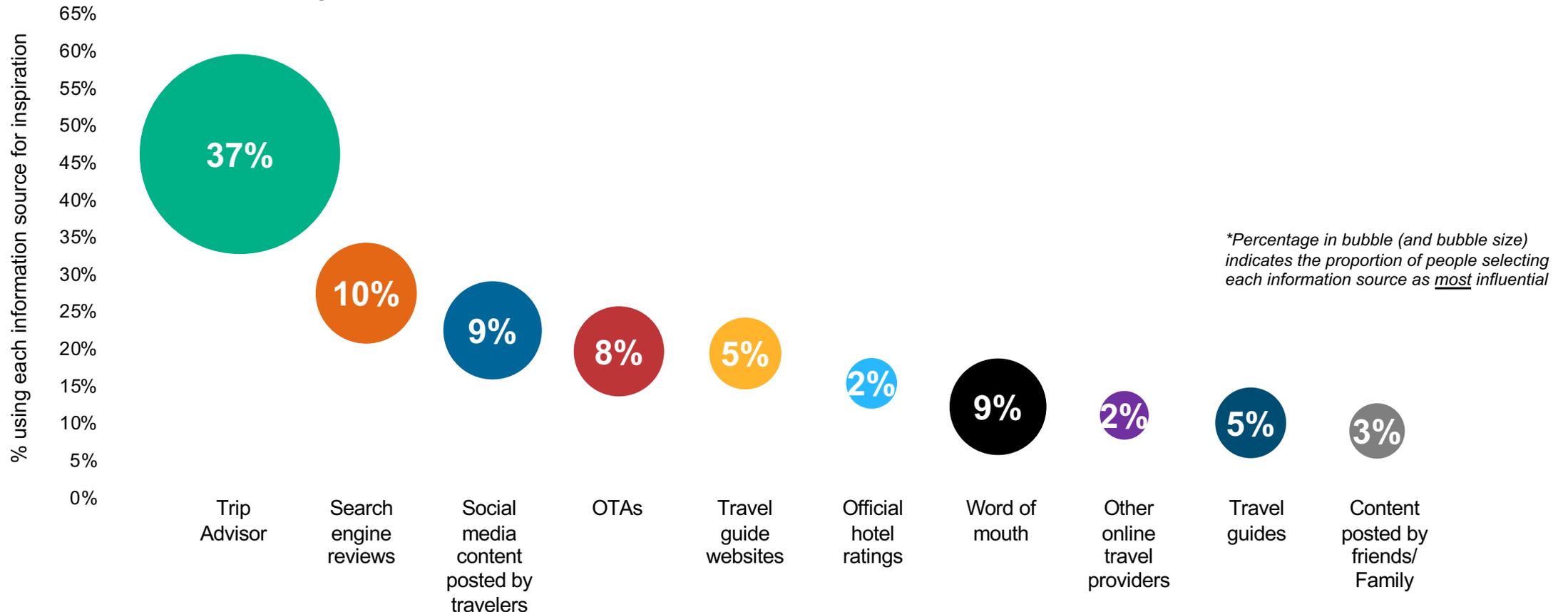
Which of the following best describes how you started planning your trip?



# 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

## Where did you look for inspiration when considering which destination to visit? – Top 10 most used sources



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)



“I regularly browse TripAdvisor with no particular trip in mind”

What is important for you when traveling? – “I regularly browse TripAdvisor with no particular trip in mind”

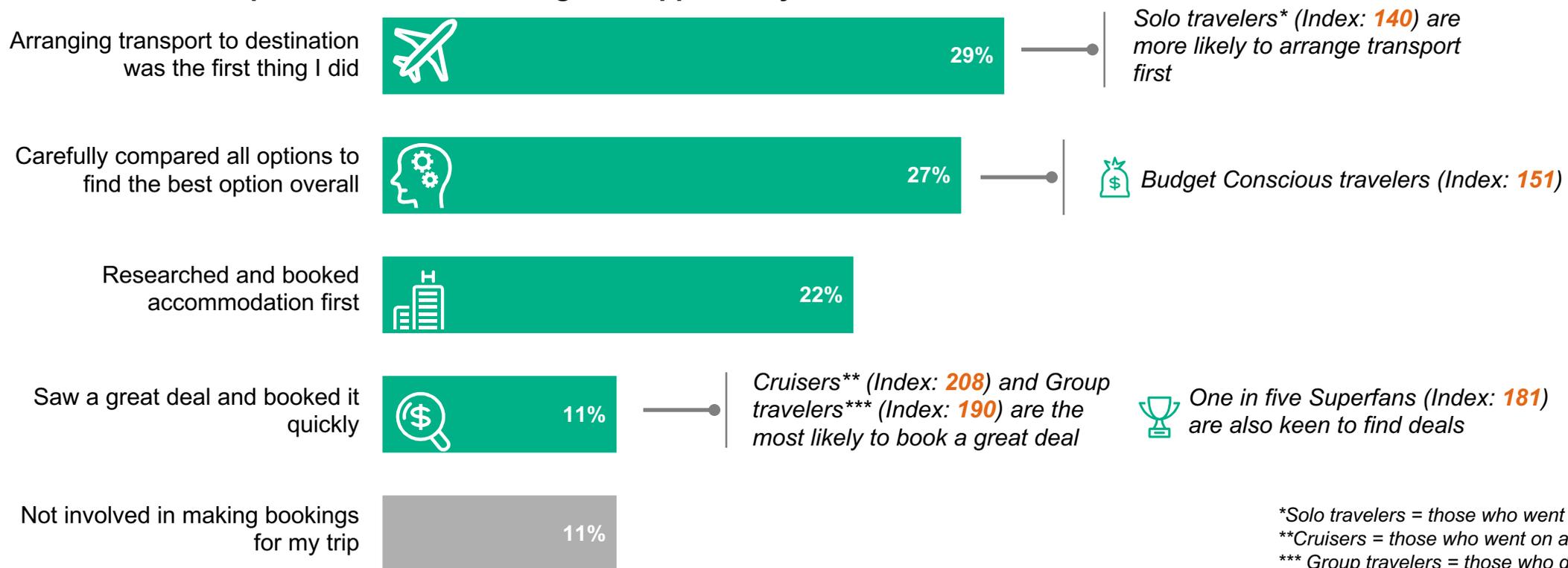
Nationality (top 10)			Index	Nationality (bottom 10)			Index
Argentina	77%	123		Switzerland	60%	95	
Spain	76%	121		China	58%	92	
Caribbean	75%	120		USA	57%	91	
Brazil	73%	117		Thailand	57%	90	
Japan	72%	115		Austria	56%	89	
Portugal	71%	113		Singapore	53%	84	
Ireland	69%	110		UAE	48%	76	
Italy	69%	110		Germany	47%	74	
Mexico	68%	109		Malaysia	44%	69	
India	66%	105		Indonesia	35%	55	

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?

# The path to booking varies – a similar proportion of travelers book transport first before comparing all options

- Solo travelers ensure that their transportation is sorted before booking other elements of their trip
- Over one in four travelers weigh up their options before booking, especially Budget Conscious travelers

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

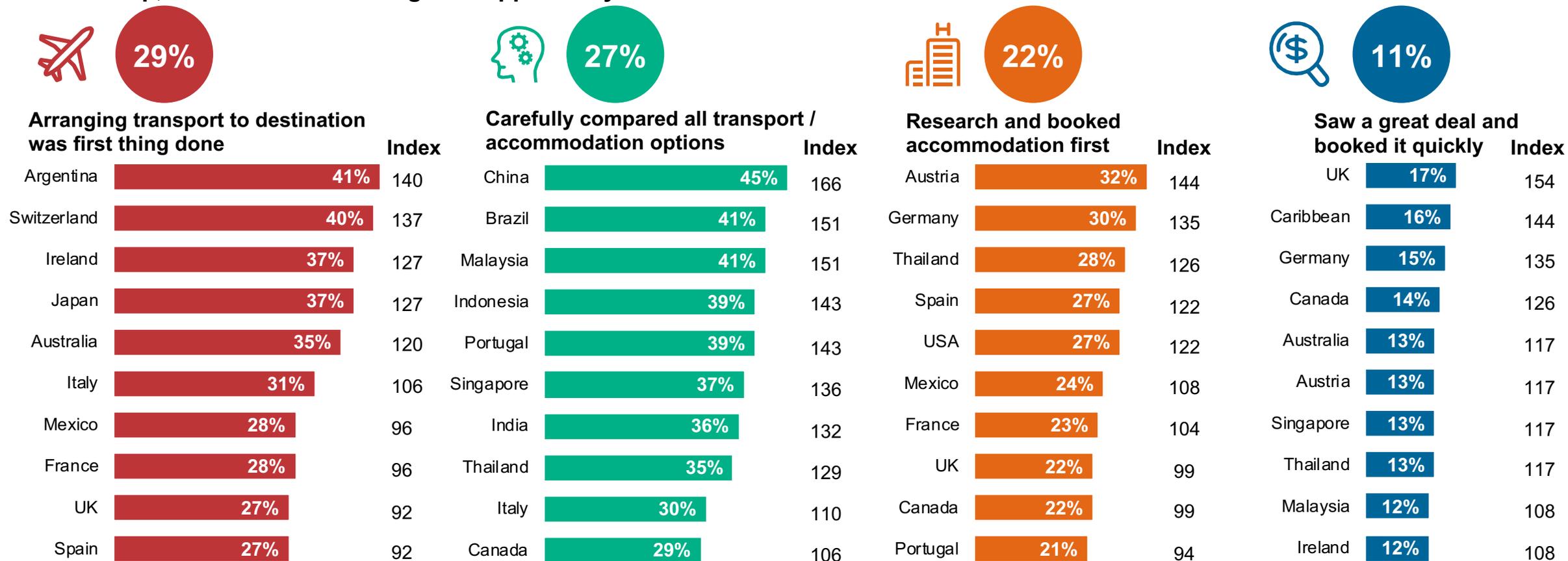


\*Solo travelers = those who went on their trip alone  
\*\*Cruisers = those who went on a cruise  
\*\*\* Group travelers = those who described their trip type as a “group travel tour”

# 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?



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)



“Love to travel to see new places and cultures never experienced before”



“I care more about local history and culture than weather when traveling”



“The perfect trip is spending it on a warm, sunny beach”

# 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)



“A trip seeing multiple destinations is better than staying in one place”



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

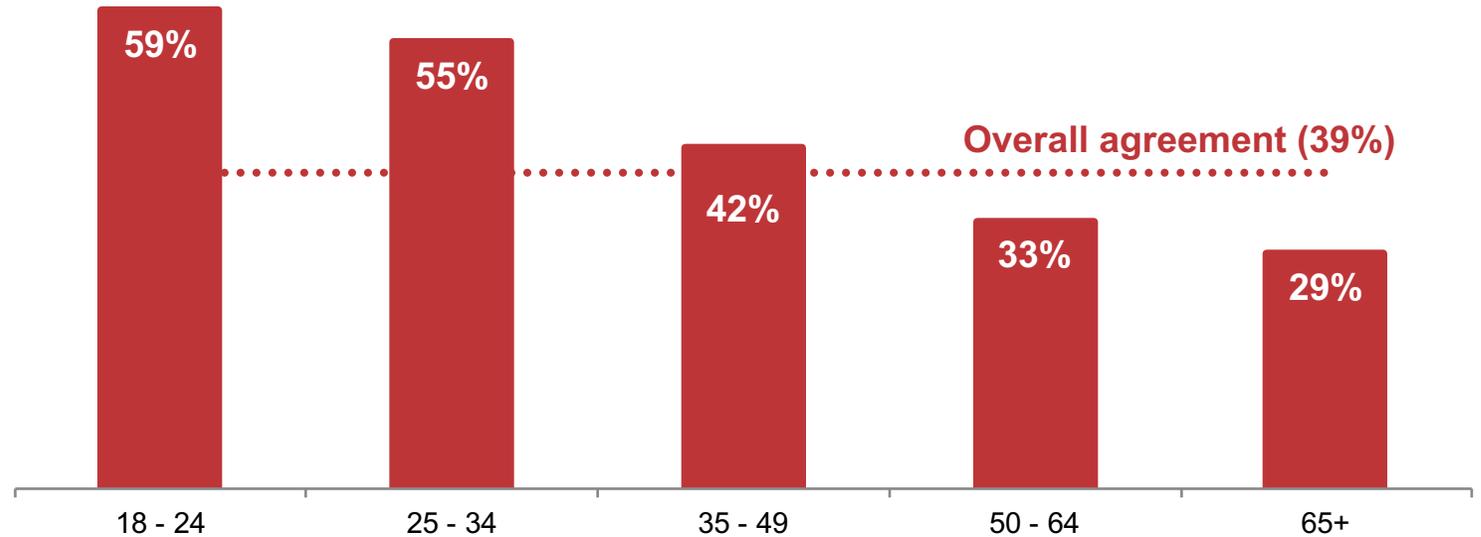
# Younger travelers are more likely to want excitement and fun when traveling

- 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**



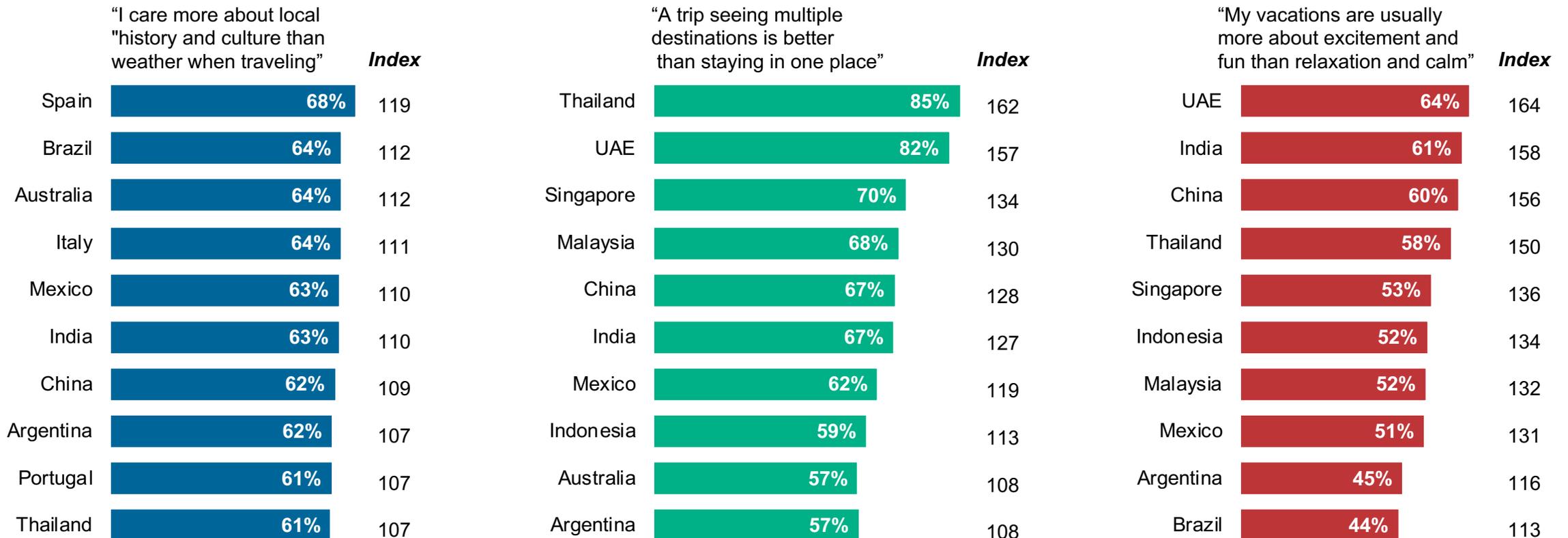
“My vacations are usually more about excitement and fun than relaxation and calm”



# 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

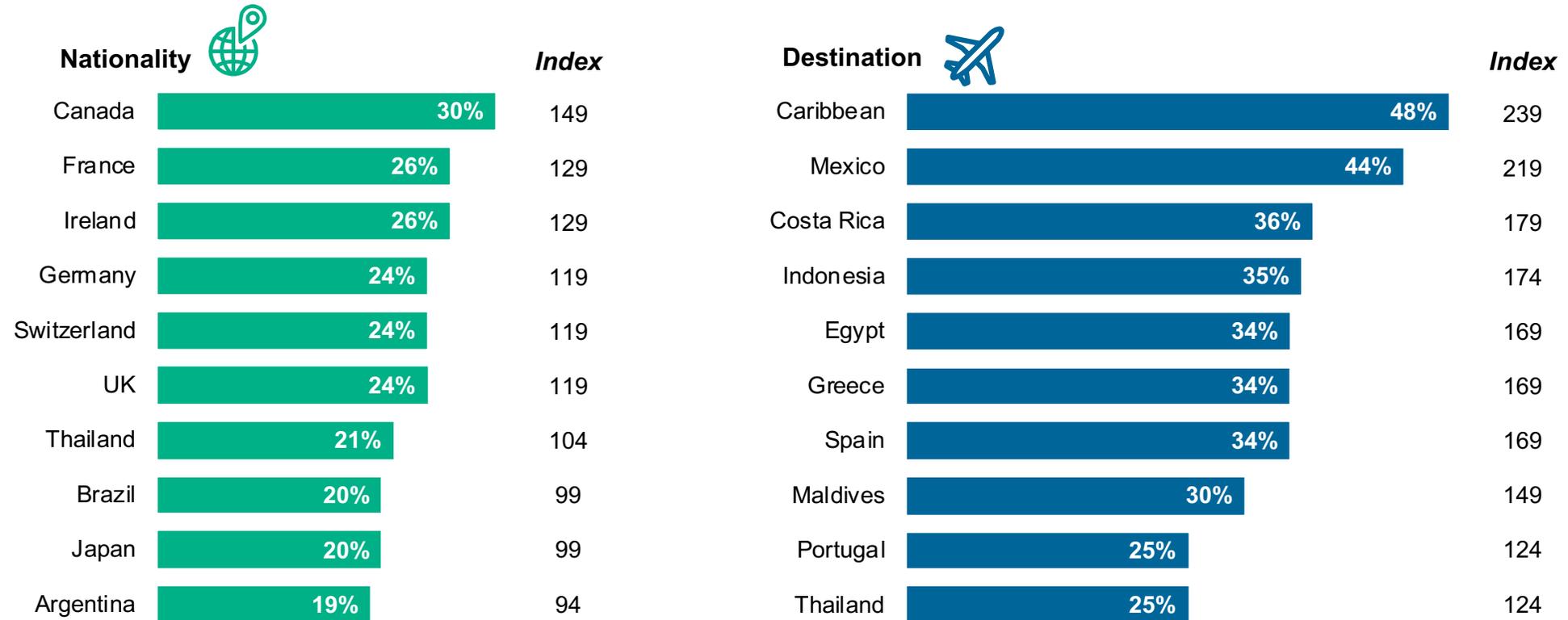


Q1. Below are a series of statements that people have made about their choices when booking a trip. To what extent do you agree, or disagree, with these statements? *Only showing countries with more than 100 completes*

# 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”

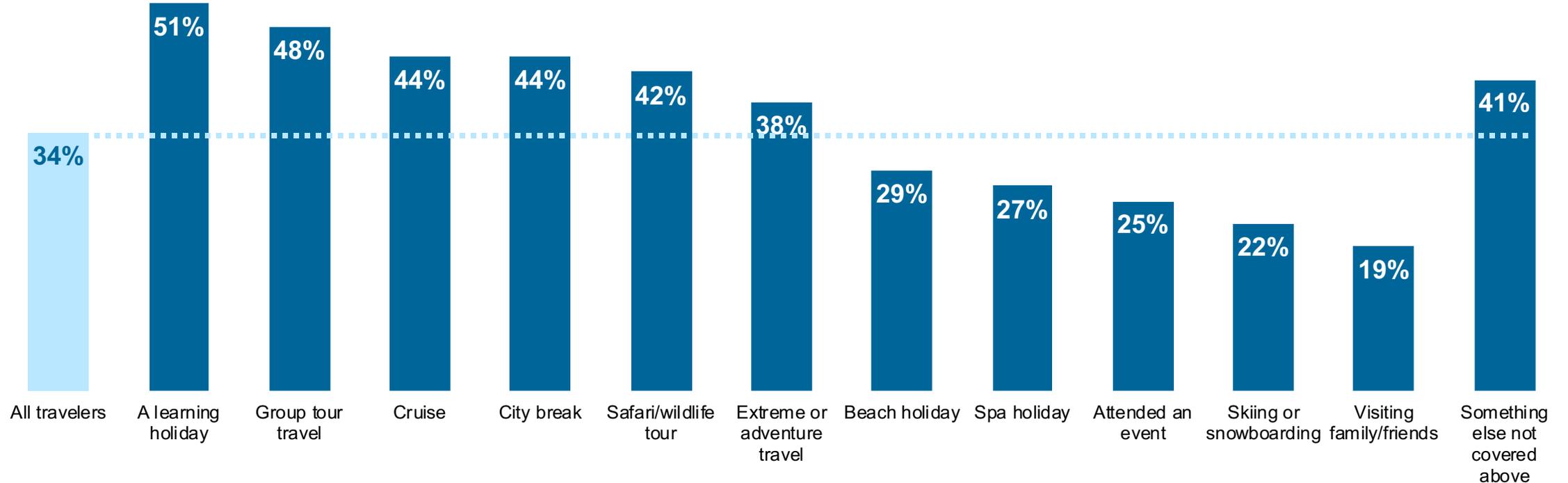


Q15. What were the main reasons for choosing where you went on your last trip? – All who selected “the weather” – the left hand chart shows results according to traveler’s nationality while the right hand chart shows results according to the traveler’s destination

# 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)

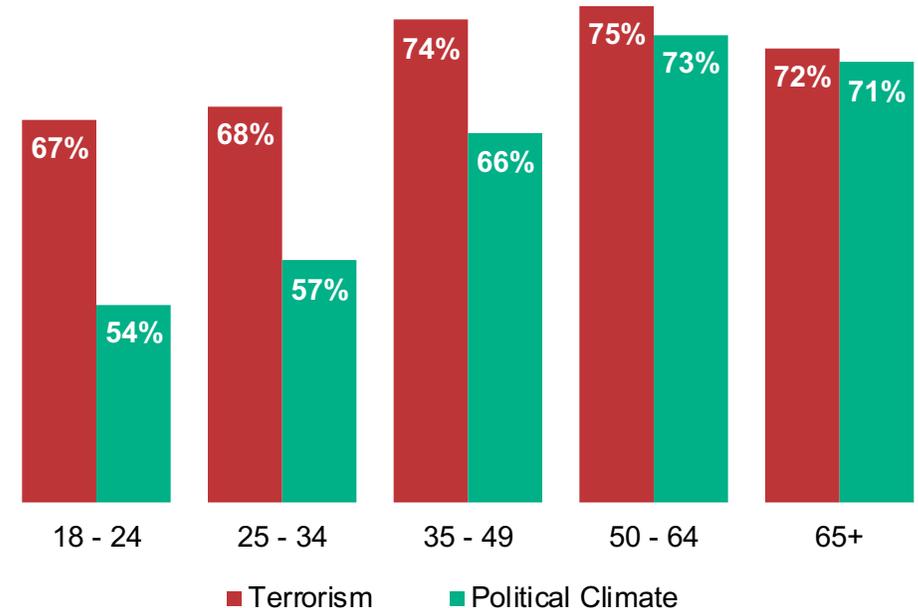


“Concerns about terrorism may affect my choice of destination”



“The political climate of my preferred destination may influence my travel plans”

% agreeing with each statement (Age group)

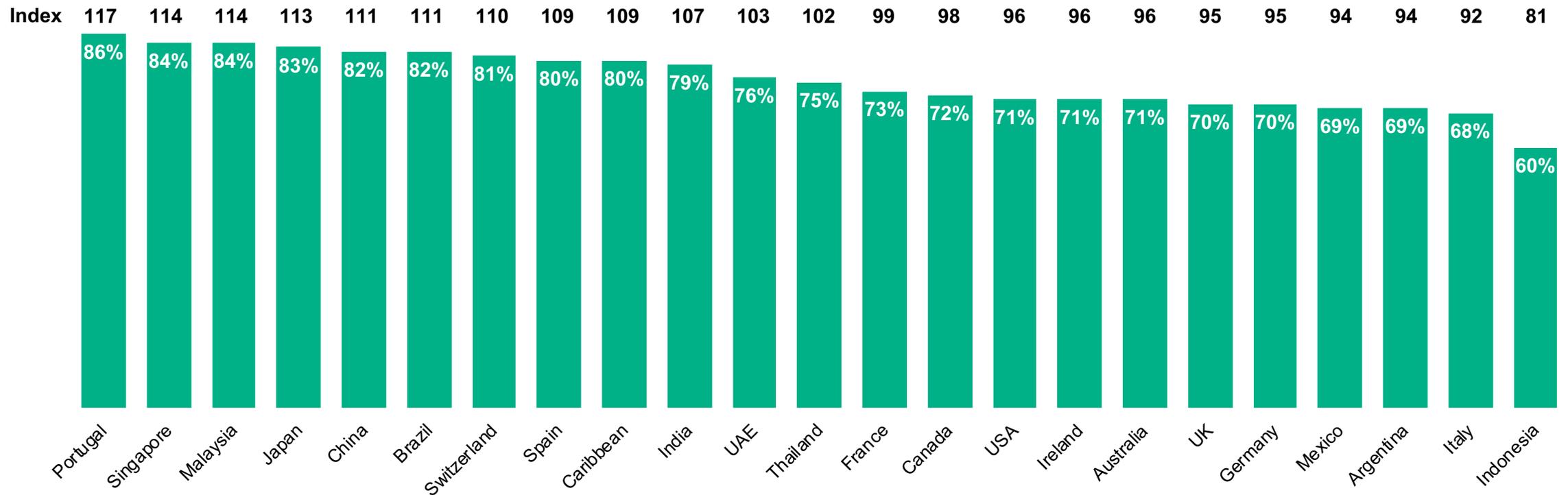


Q1. Below are a series of statements that people have made about their choices when booking a trip. To what extent do you agree, or disagree, with these statements?

# Travelers are almost equally concerned about terrorism

- Indonesians are the least likely to have terrorism concerns about their destination

What is important for you when traveling? – “Concerns about terrorism may affect my choice of destination”

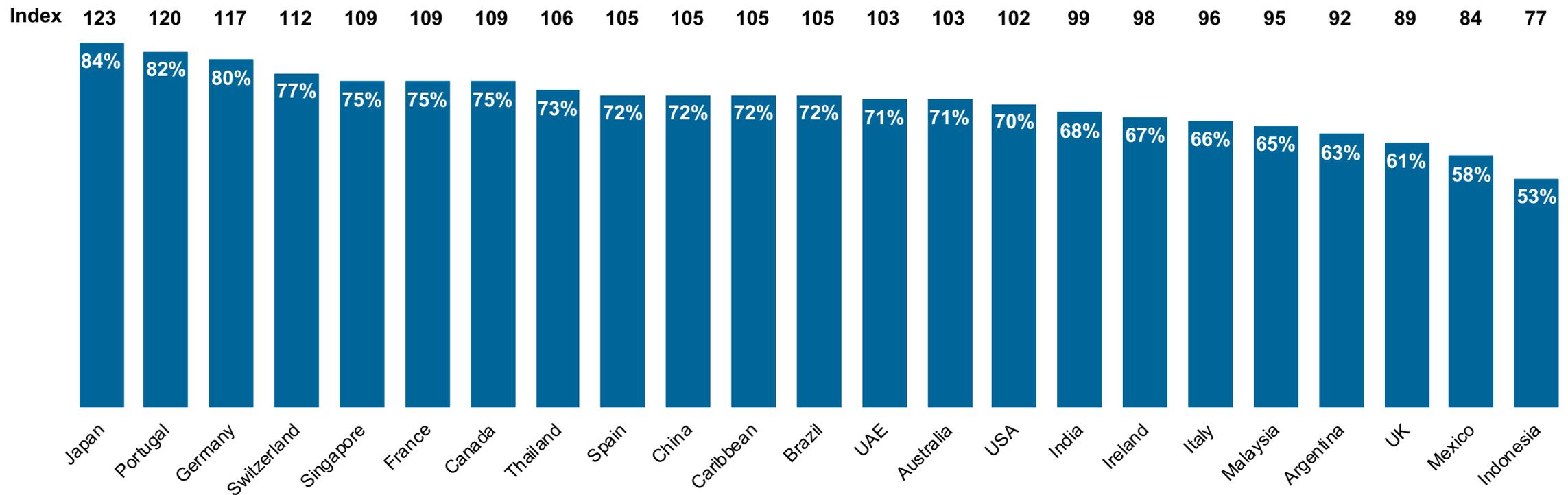


Q1. Below are a series of statements that people have made about their choices when booking a trip. To what extent do you agree, or disagree, with these statements? *Only showing countries with more than 100 completes*

# 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

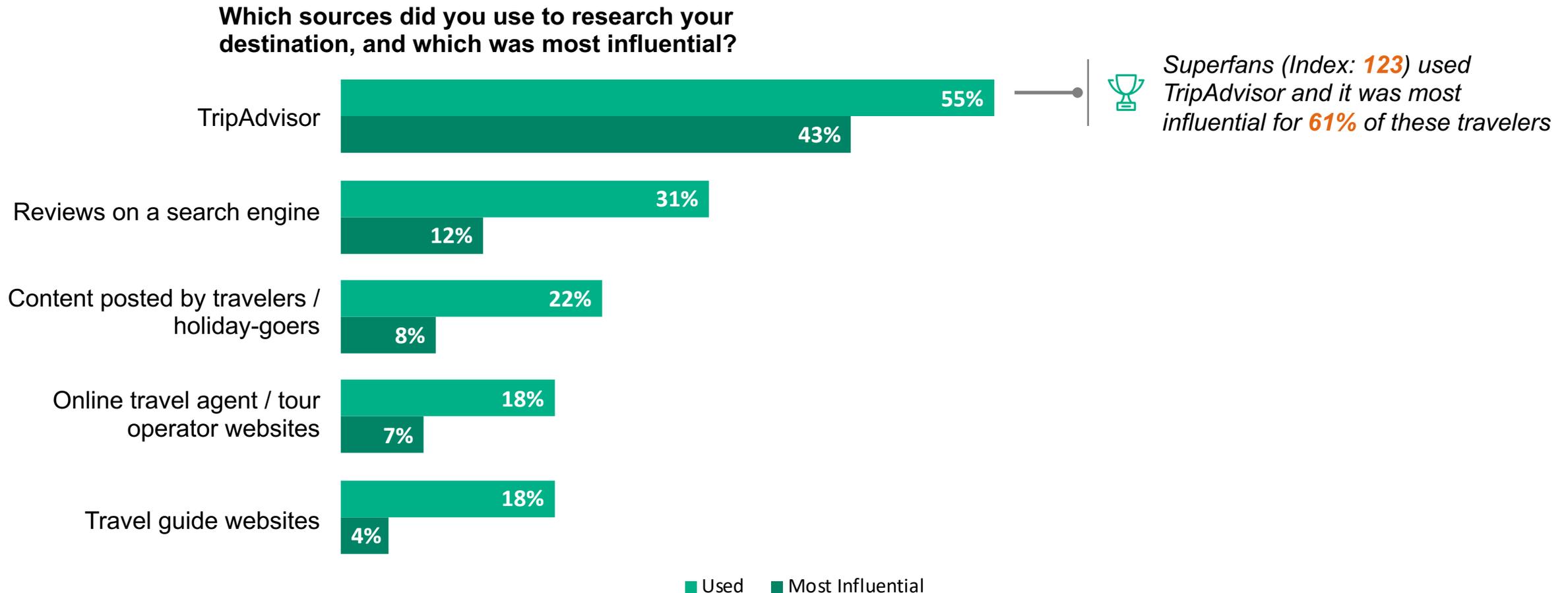
What is important for you when traveling?– “The political climate of my preferred destination may influence my travel plans”



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?



# Destination choice and the role of TripAdvisor



# One in every two TripAdvisor users have been inspired to visit a new destination by TripAdvisor

**49%**

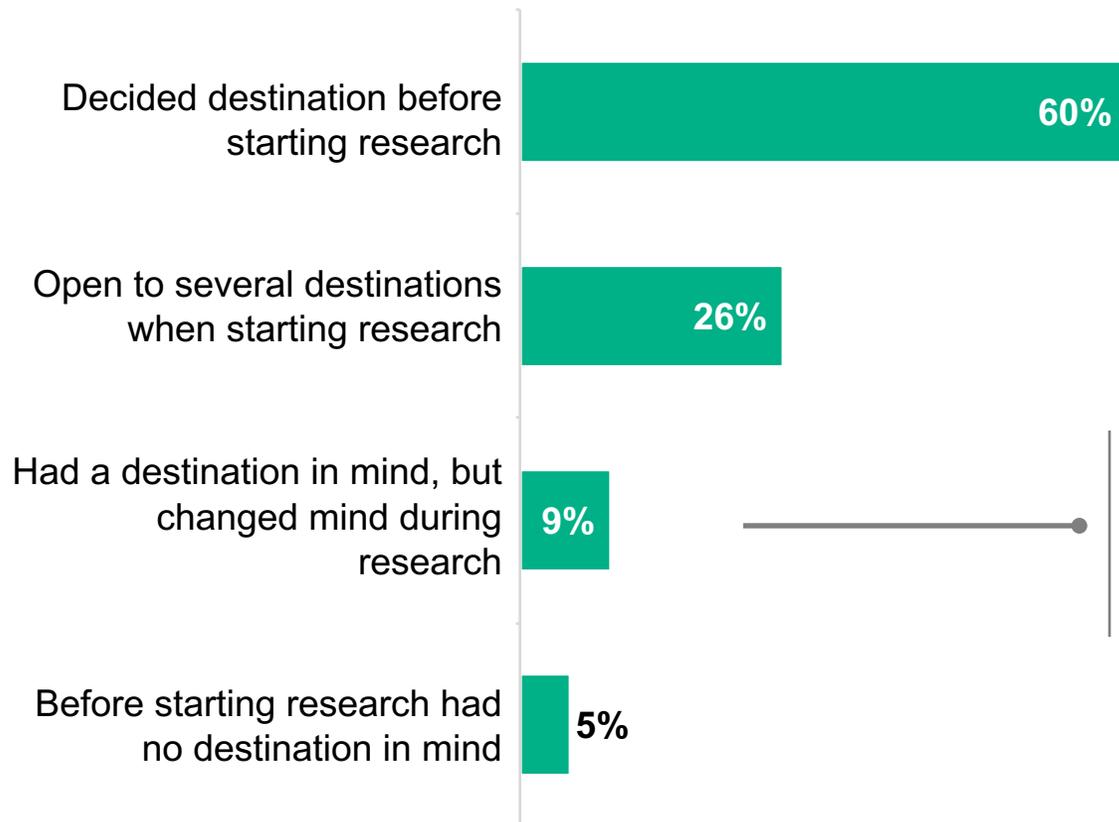
**Of travelers say TripAdvisor has inspired them to visit a destination they had not previously thought of**

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?

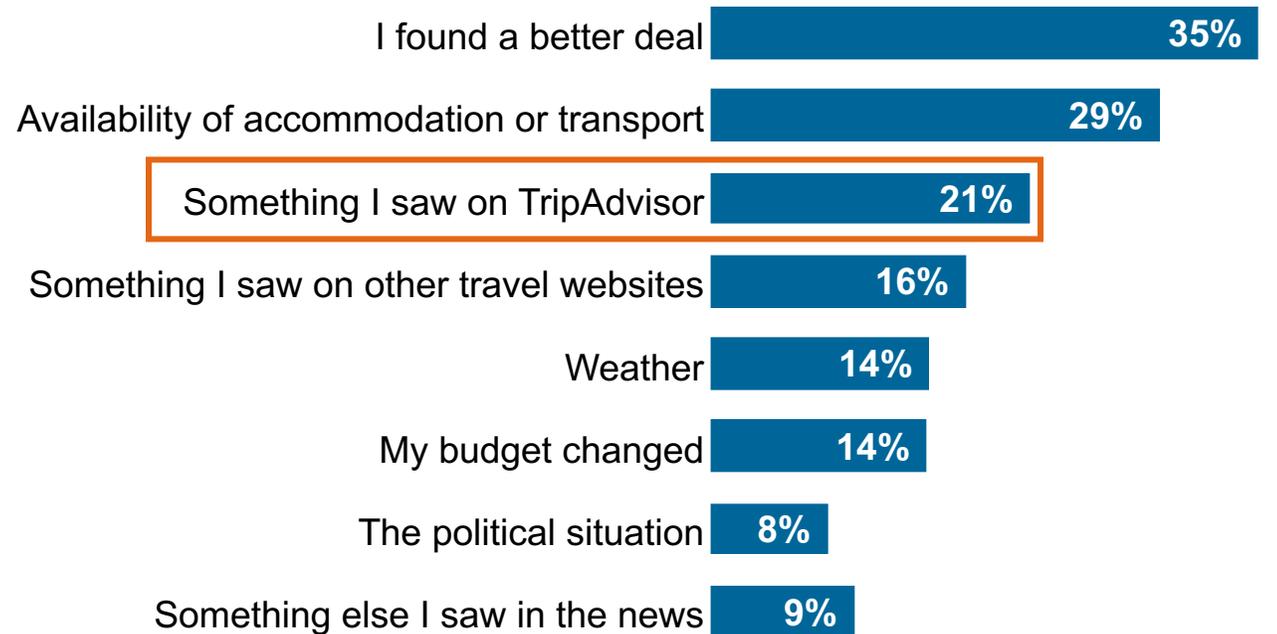
# One in ten travelers originally had a destination in mind but changed their mind

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

Which of the following best describes you?



Why did you change your destination after starting research?



# TripAdvisor is an inspiration to travelers who can spend more and also travelers looking for cheaper alternatives

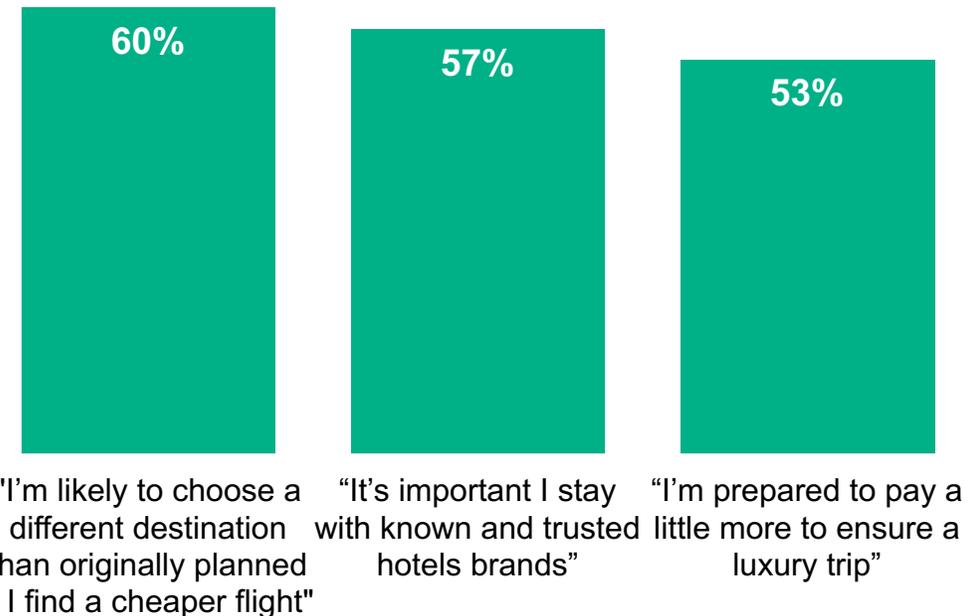
- TripAdvisor inspires three in five travelers who are likely to change their destination due to a cheaper flight and also the same proportion of travelers who prefer staying at a trusted hotel
- Just over half of travelers who are prepared to pay more for luxury are inspired by TripAdvisor to visit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

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



“TripAdvisor has inspired me to visit a destination I had not previously thought of”

What is important for you when traveling? – “TripAdvisor has inspired me to visit a destination I had not previously thought of”



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?

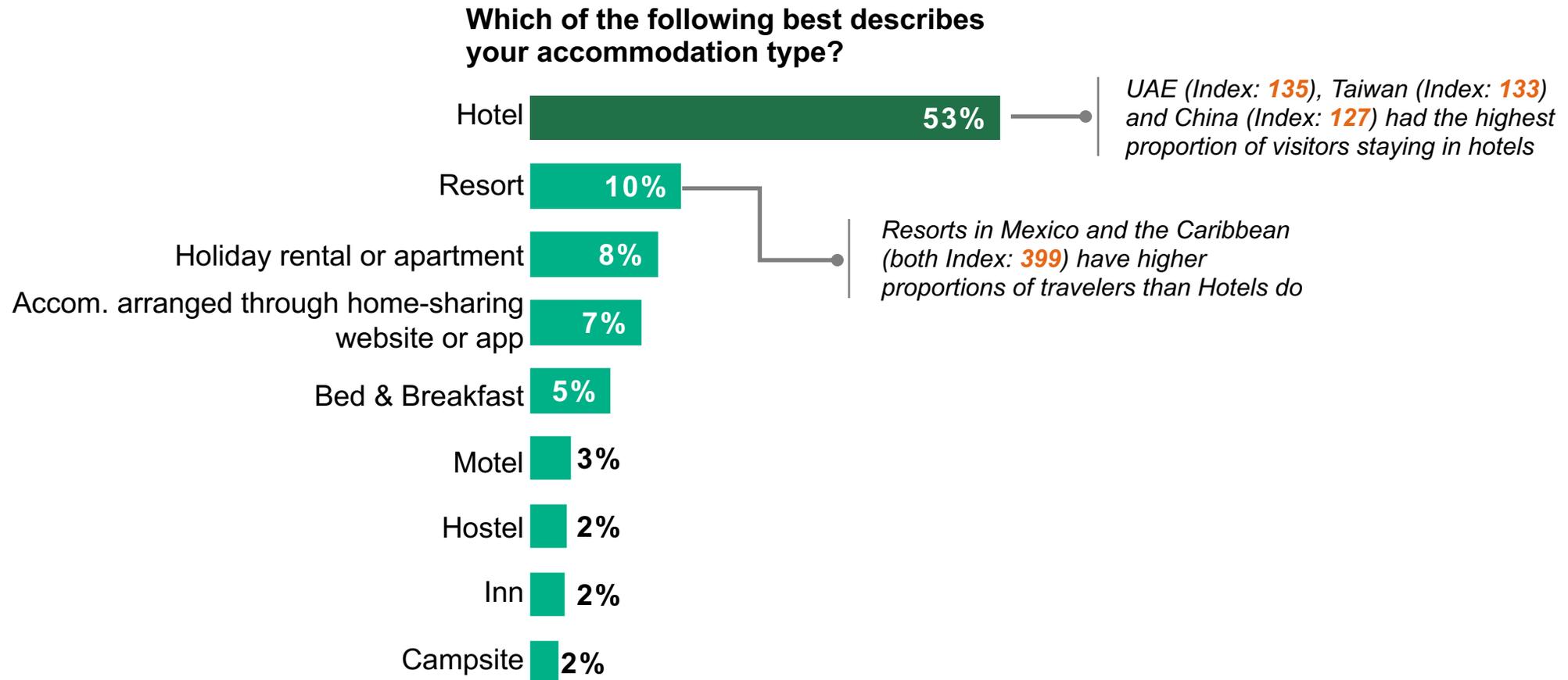


# What influences accommodation choice?



# Hotel usage is high in Asia – the top 3 destinations are found there

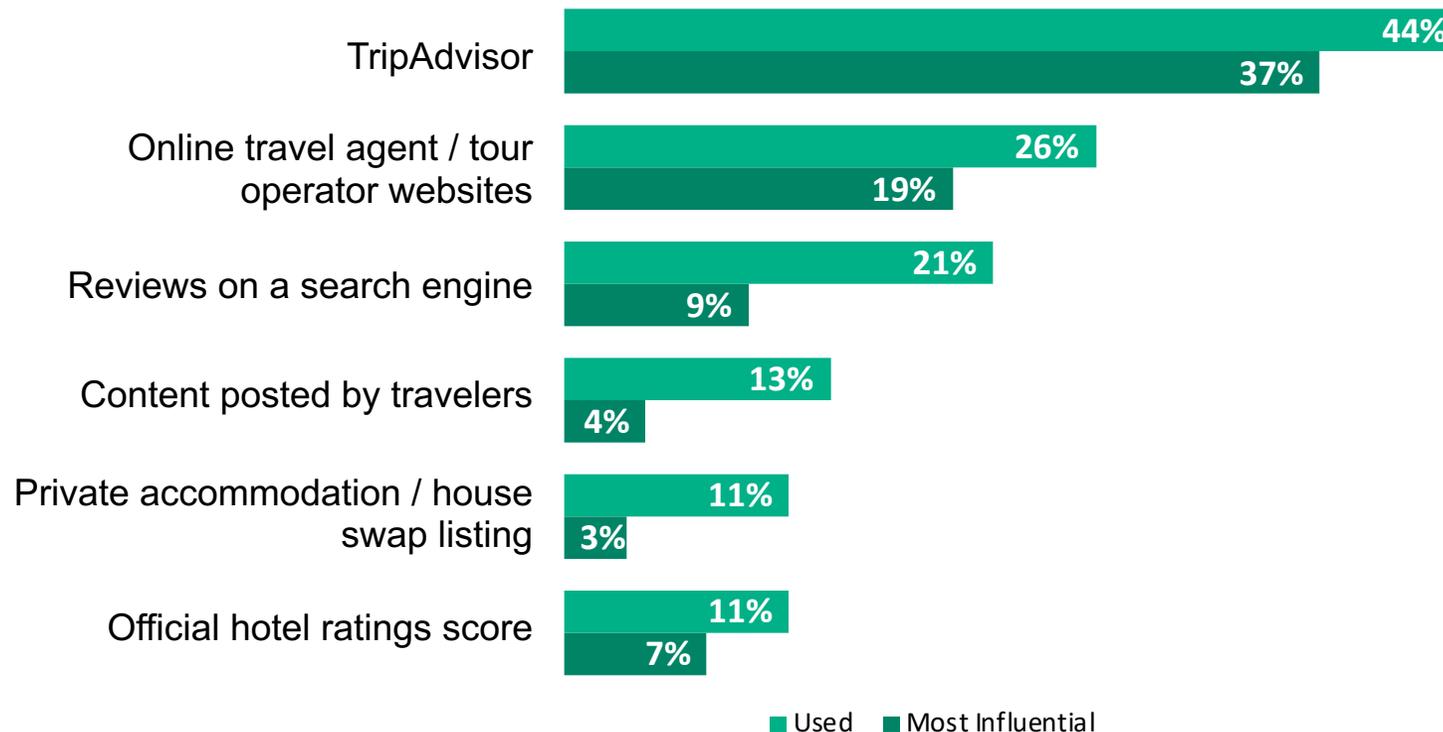
- Where hotel use is low, resorts – the next most frequent accommodation option – are popular



# 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

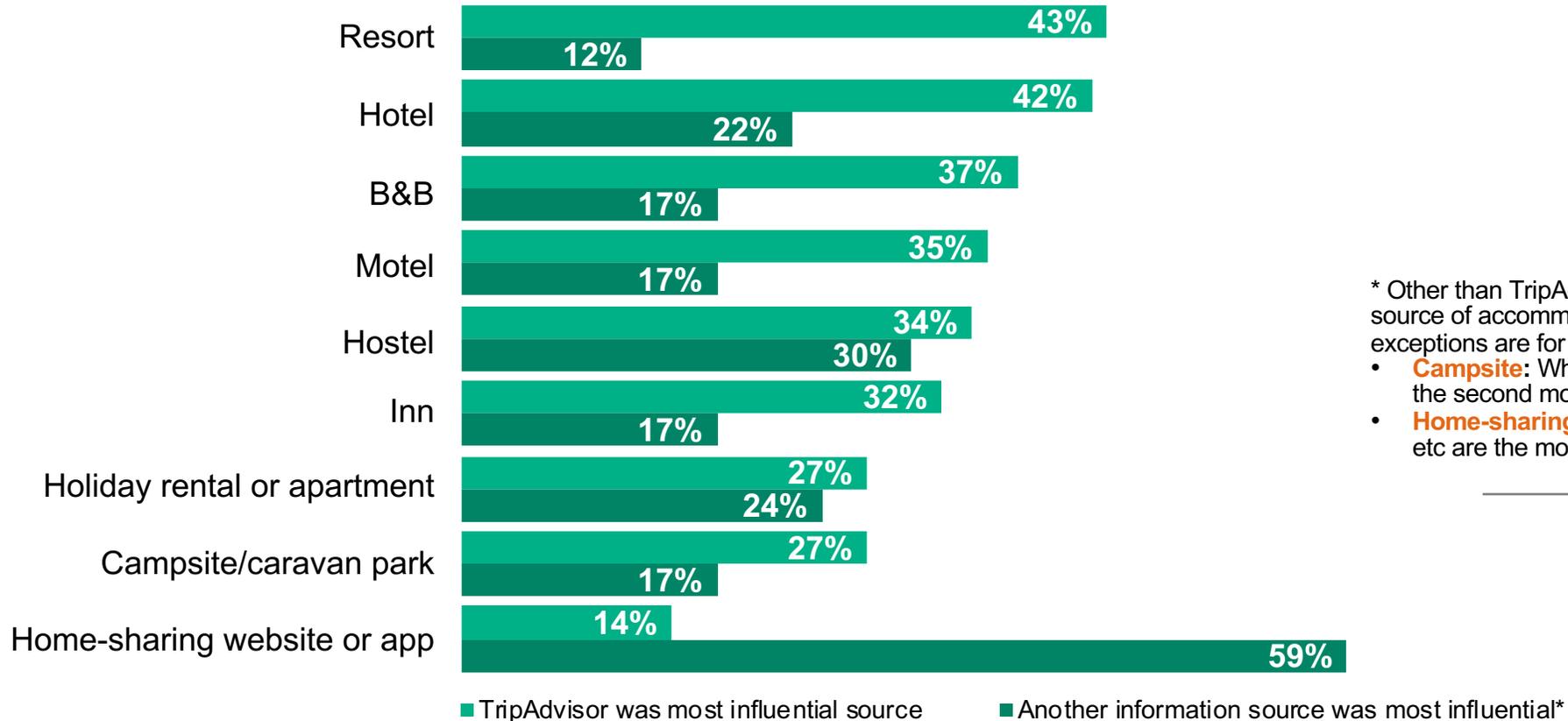
**Which sources did you use to research your accommodation, and which was most influential?**



# Travelers staying in resorts are particularly reliant on TripAdvisor when researching accommodation

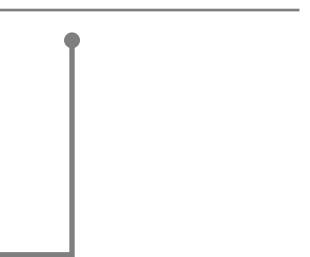
- TripAdvisor is most influential among UK and Irish travelers when researching accommodation, but less influential in Asian markets

Comparative influence of TripAdvisor and other most influential sources when researching accommodation, by accommodation type



\* Other than TripAdvisor, **OTAs** are the most influential source of accommodation research for travelers. The exceptions are for those staying at a:

- **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

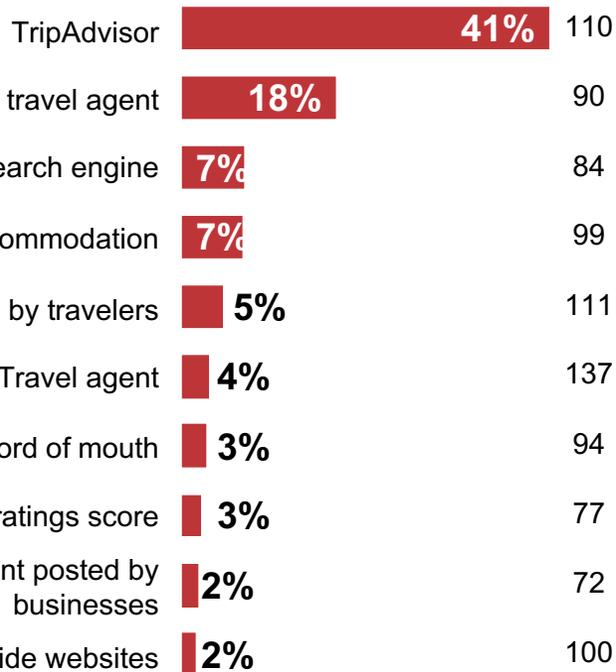
- OTAs were the next most influential source, particularly among city break travelers

## What was the most influential source when researching accommodation?



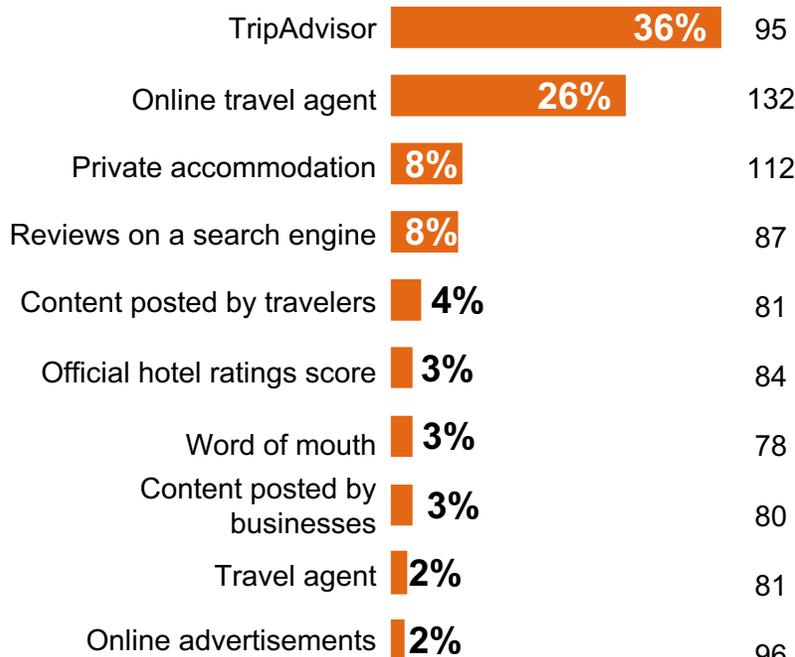
### Beach holiday

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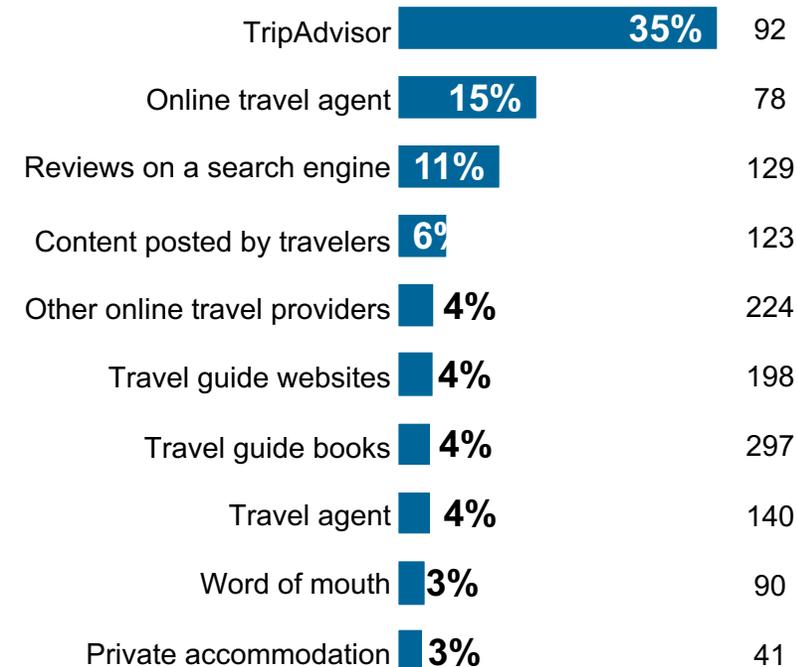
### City break

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### Cruise

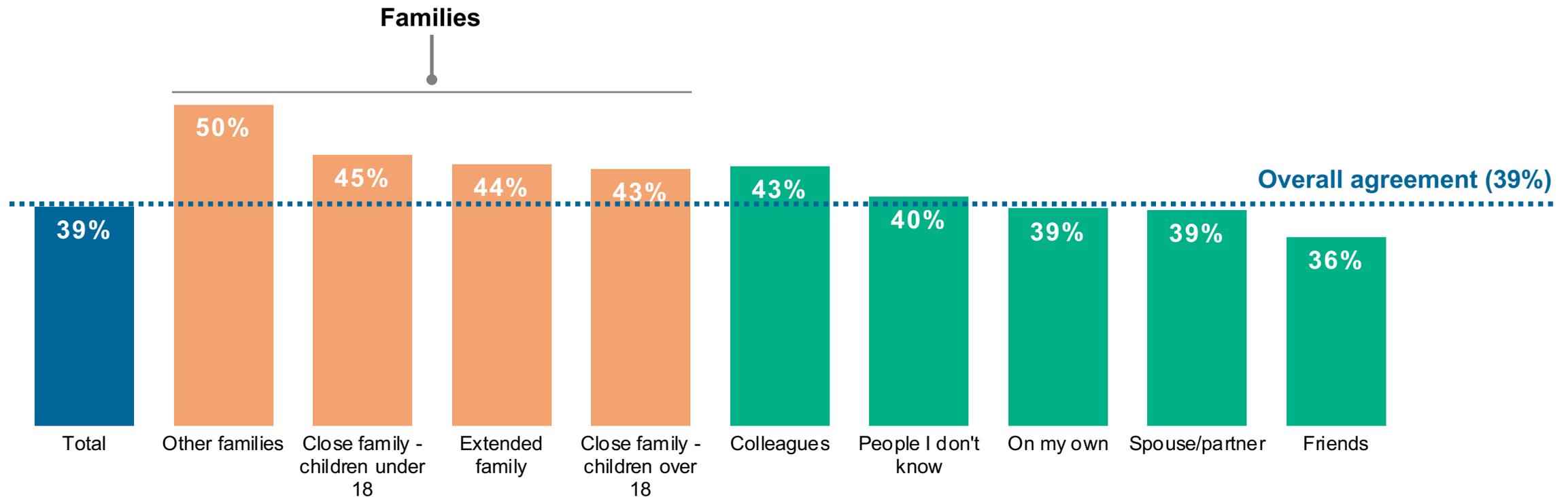
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# Families are more likely to prefer a hotel with a brand they trust

- 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”**

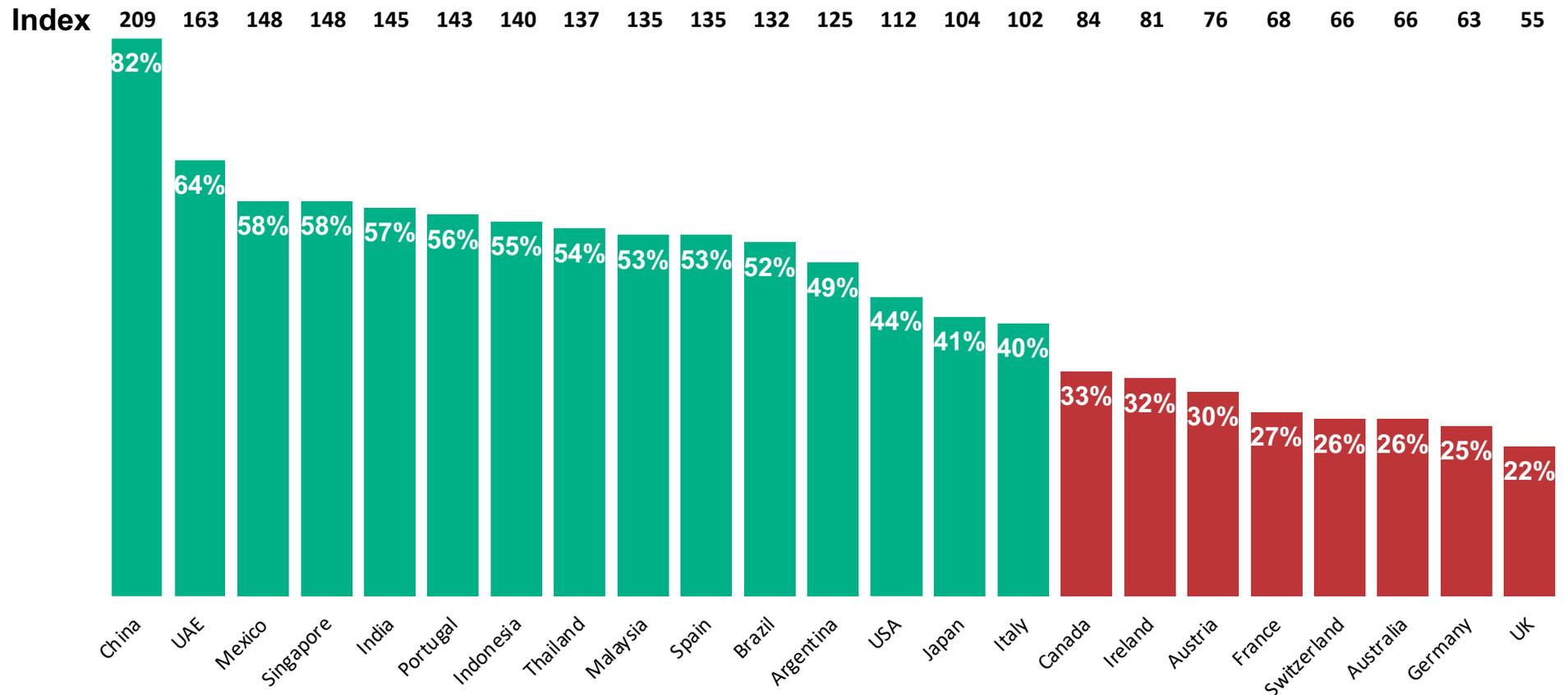


Q1. Below are a series of statements that people have made about their choices when booking a trip. To what extent do you agree, or disagree, with these statements?

# Asian travelers, especially those from China, value hotel brands much more than Europeans

- British travelers pay the least importance to hotel brands

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



What is important for you when traveling?



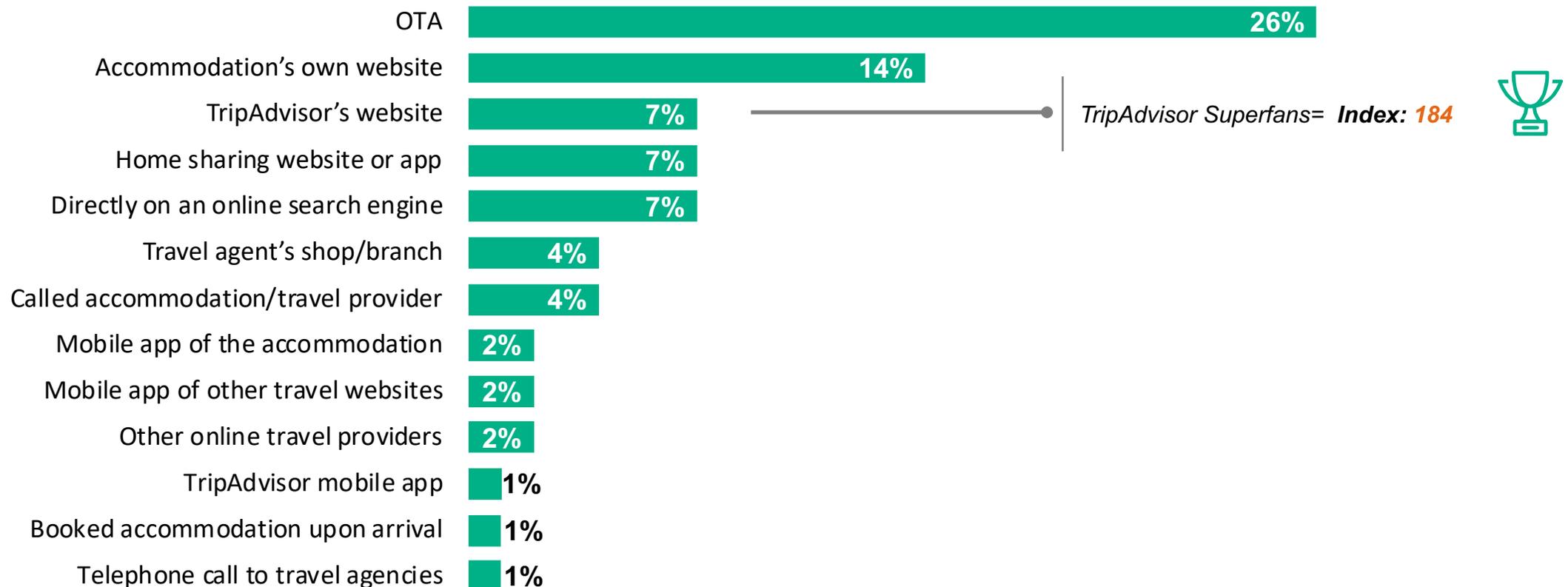
“It’s important that I stay in hotels with a brand name I know and trust”

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?

# 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?





# 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)



“Enjoy trying to find the best possible deal when planning trip”



“When going on holiday, I have a set budget for the entirety of my trip”



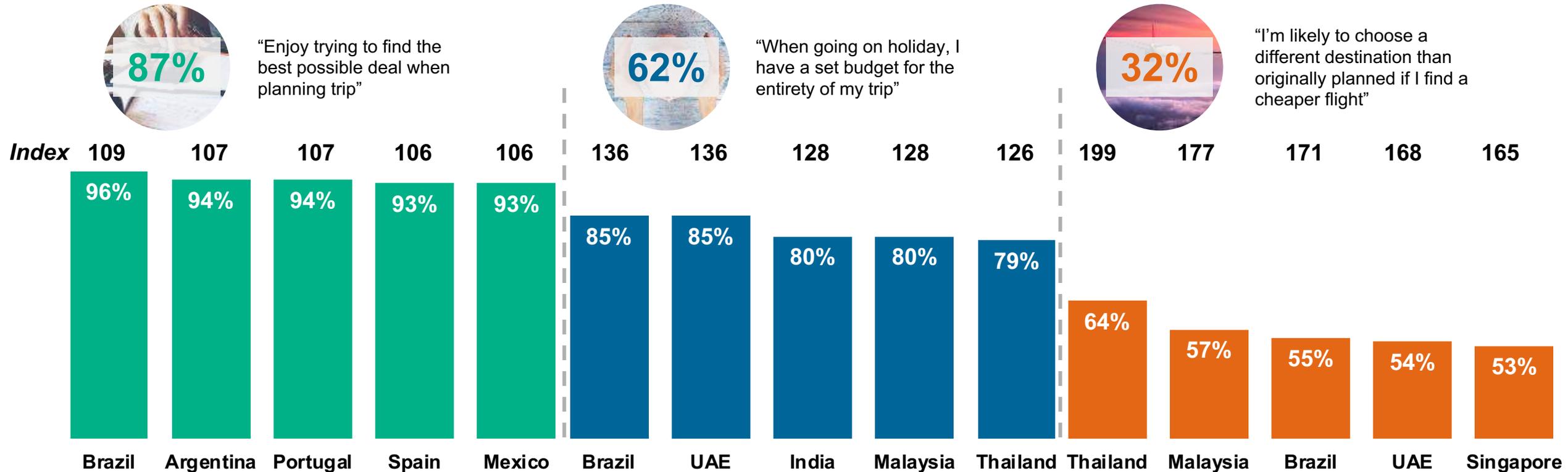
“I’m likely to choose a different destination than originally planned if I find a cheaper flight”

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)

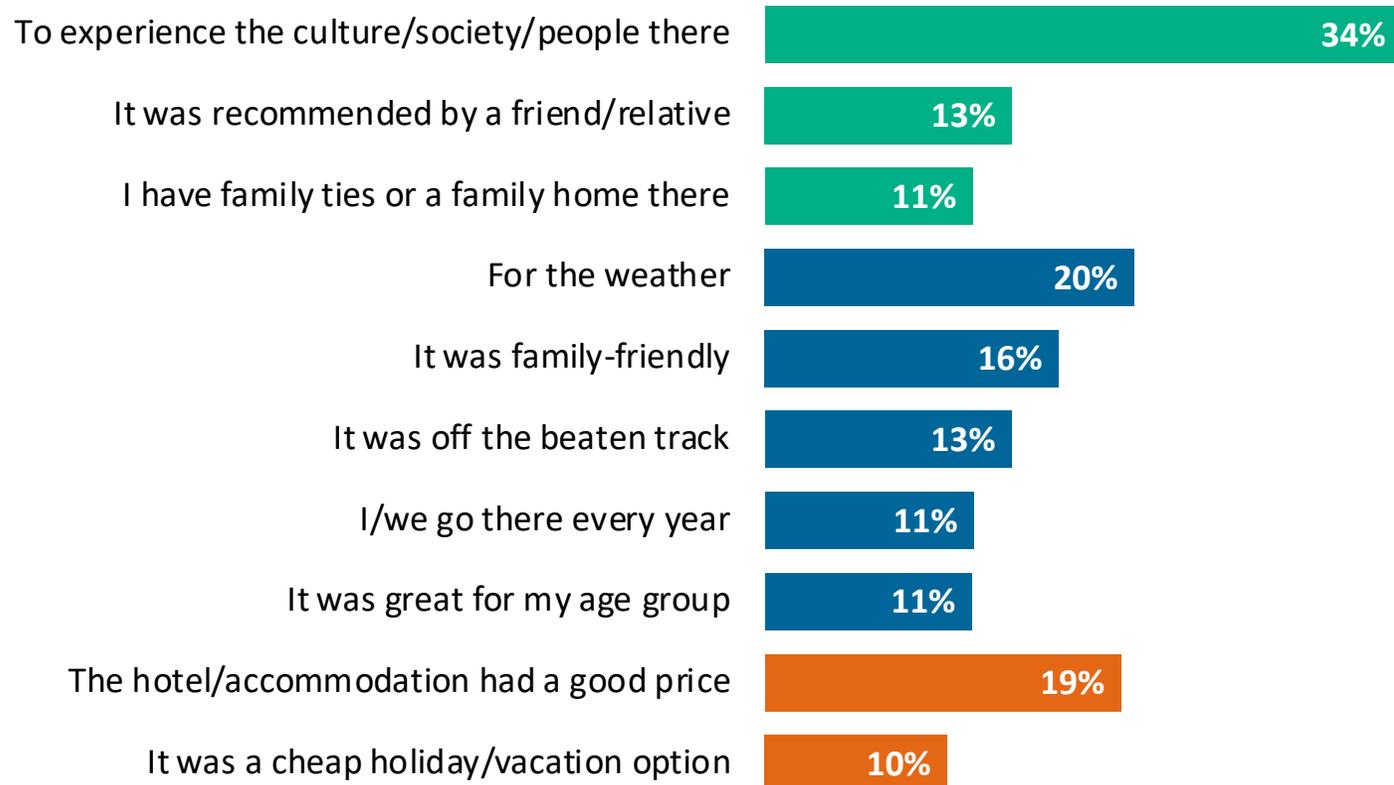


Q1. Below are a series of statements that people have made about their choices when booking a trip. To what extent do you agree, or disagree, with these statements?

# 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)



## Main reasons for choosing destination (net)

**65%**  
Social/cultural reasons (NET) 

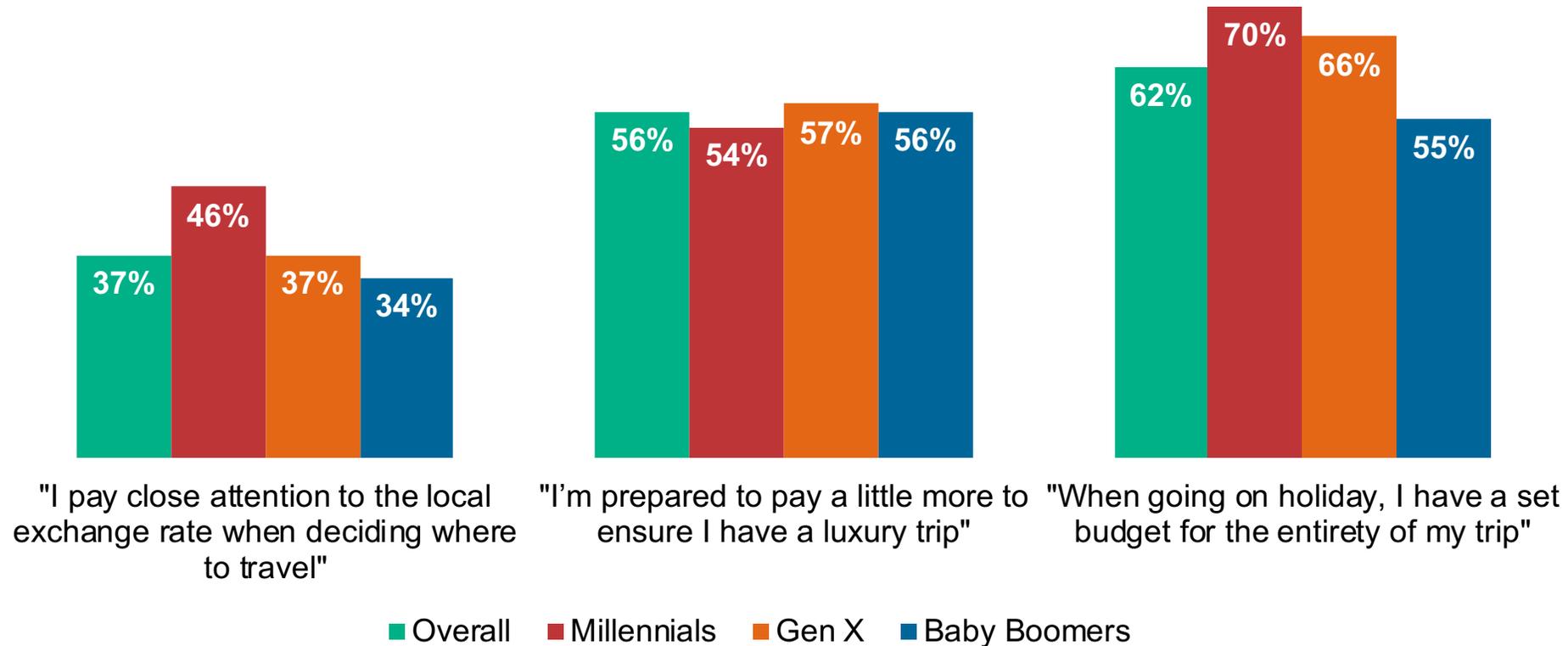
**62%**  
Emotional reasons (NET) 

**60%**  
Financial reasons (NET) 

# 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)

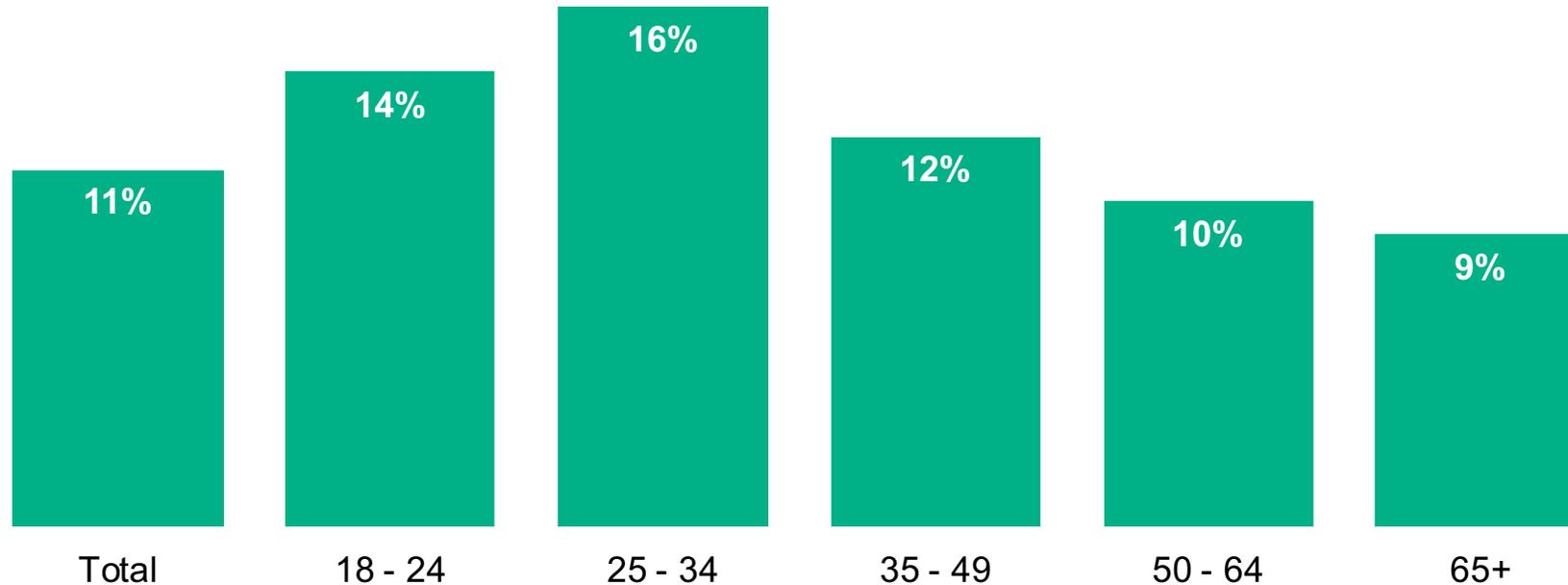


Q1. Below are a series of statements that people have made about their choices when booking a trip. To what extent do you agree, or disagree, with these statements?

# 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

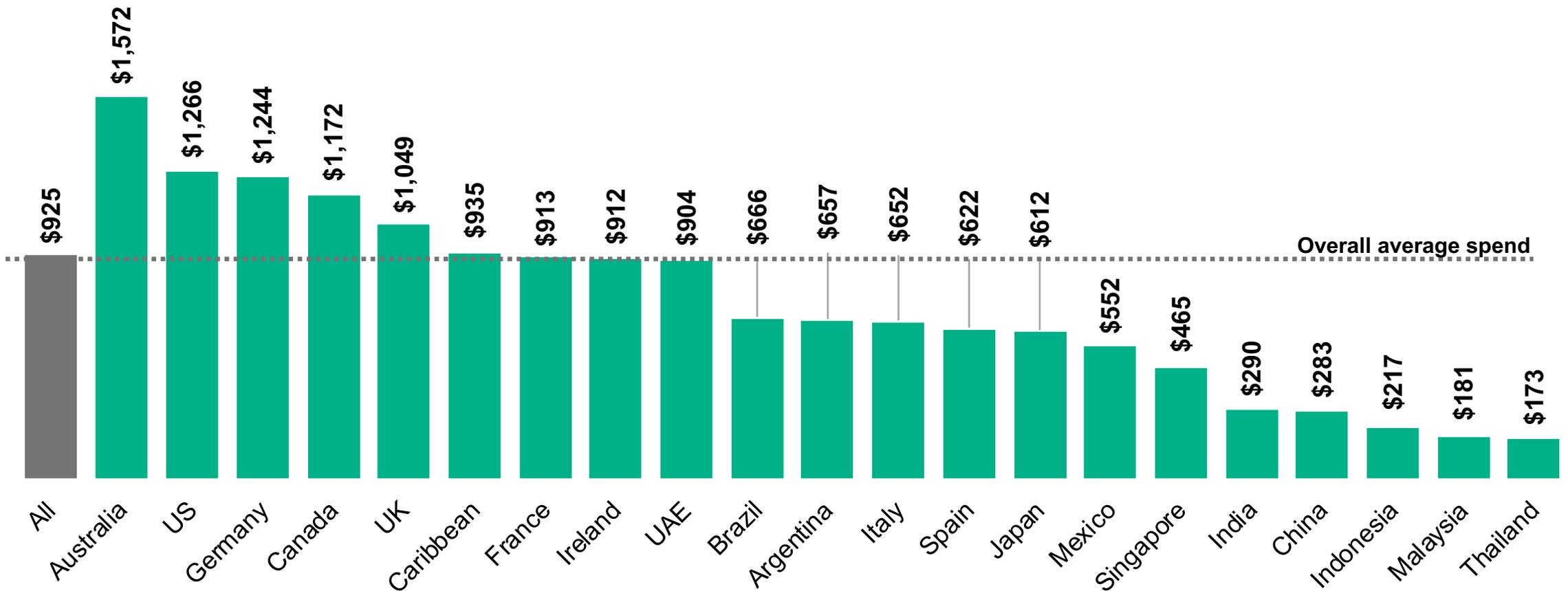
**What prompted you to start thinking about your most recent trip? – “I saw a great deal in a sale”**



# 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

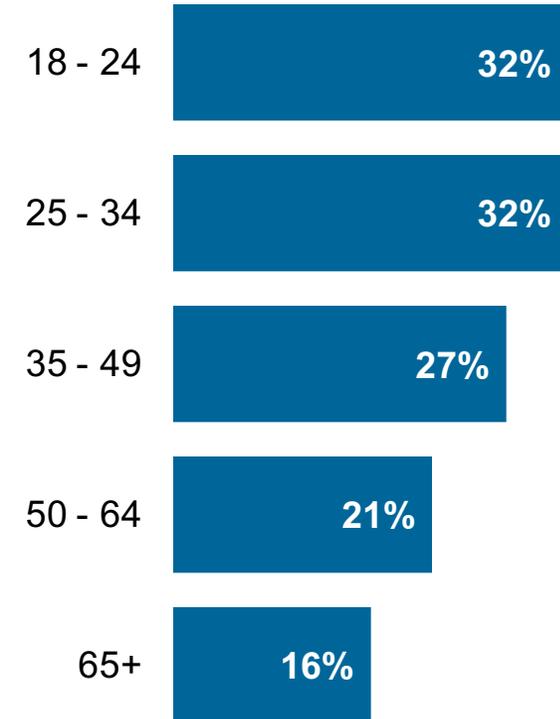
# Price aside, decisions on flights were due to logistic convenience

- 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?



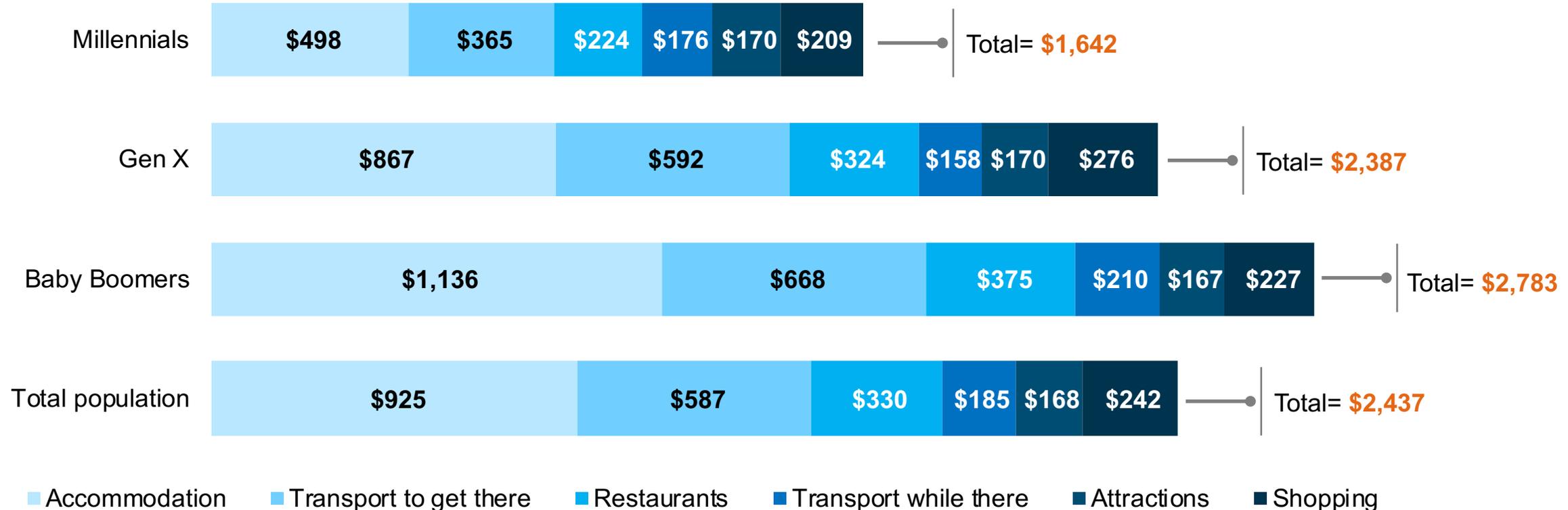
## Percentage selecting 'It had a good price' by age



# 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)

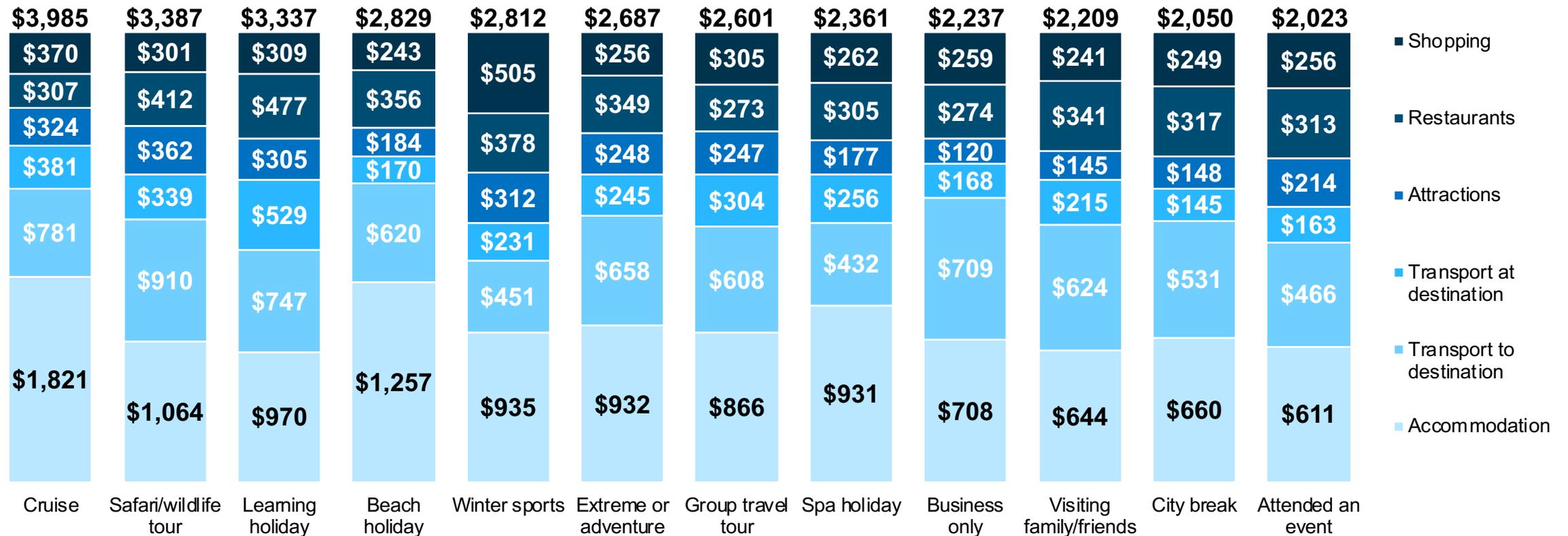
How much did you spend on the different elements of your trip? (USD)



# 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)



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

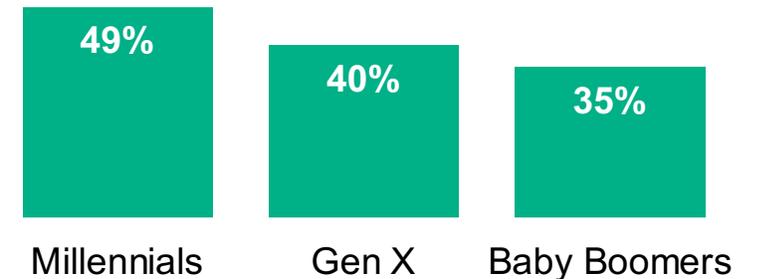
Did you pre-book any of the attractions that you researched?



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

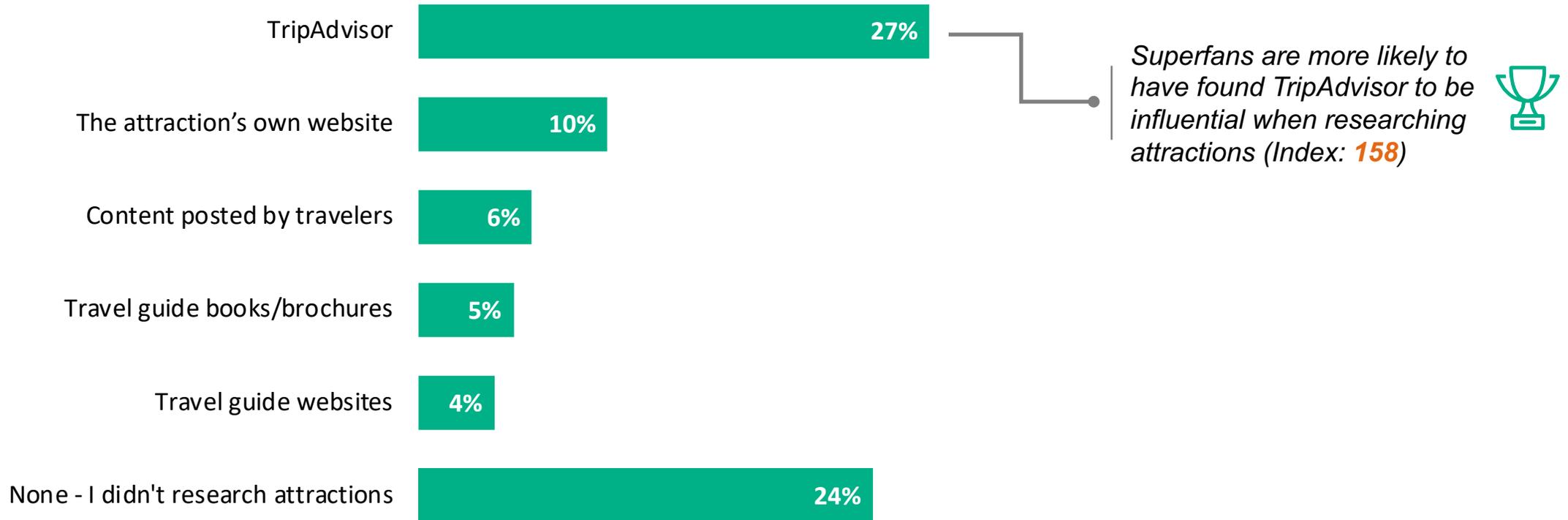
Percentage pre-booking attractions:



# 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

**Which was the most influential source when researching attractions?**





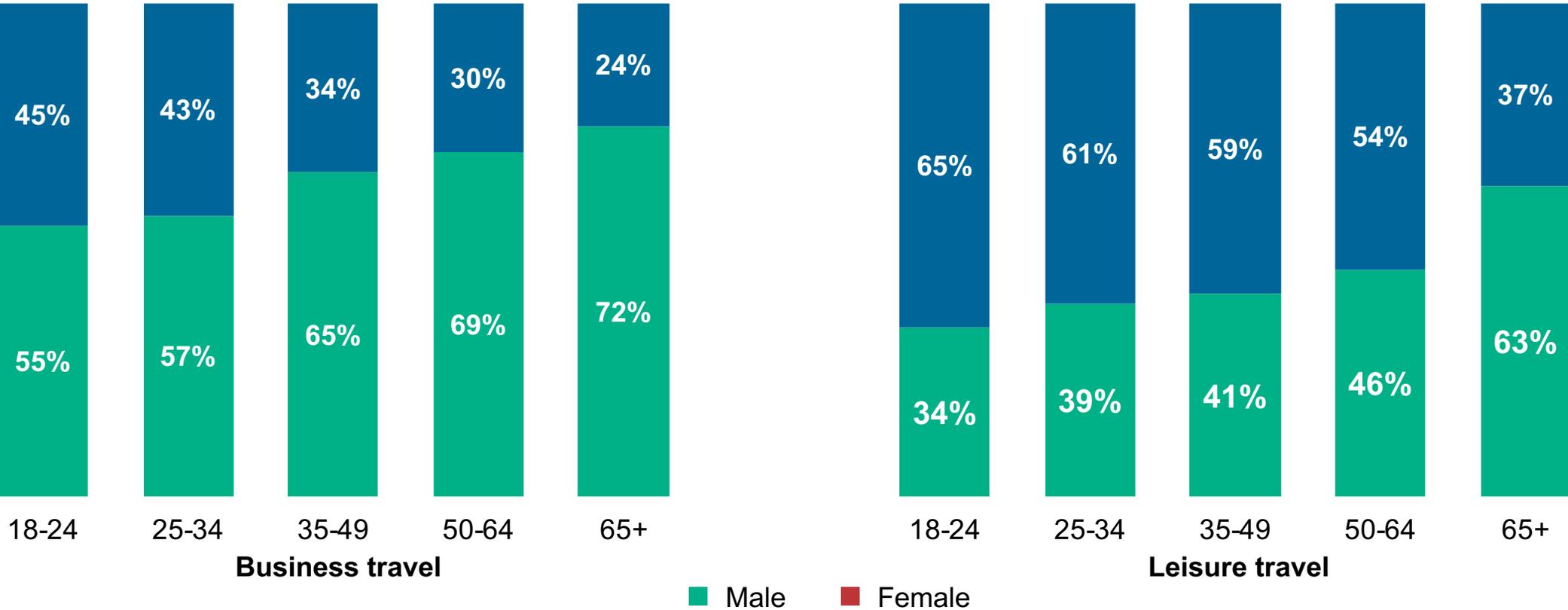
# Business travelers



# 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

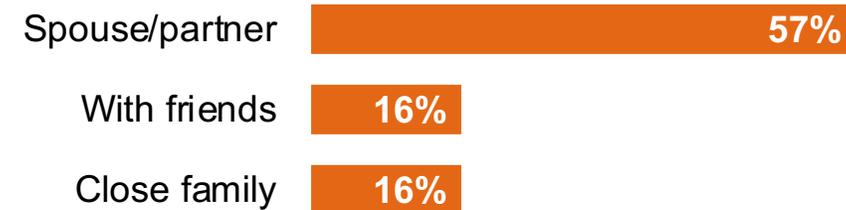
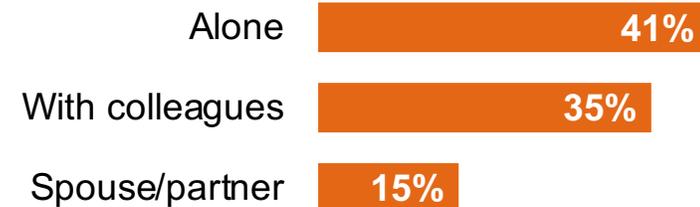
- 41% of business trips are solo compared with just 11% of leisure trips

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



■ International trip  
■ Domestic trip

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

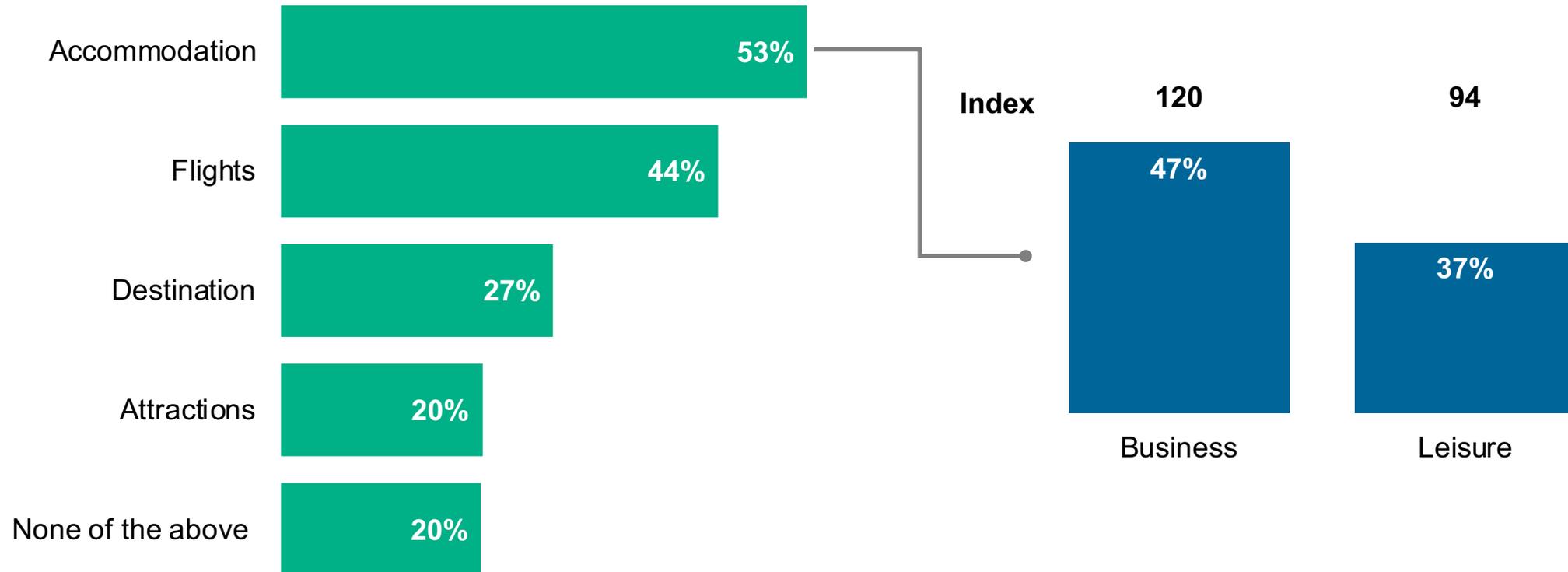


# Business travelers are often able to choose accommodation

- 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?

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



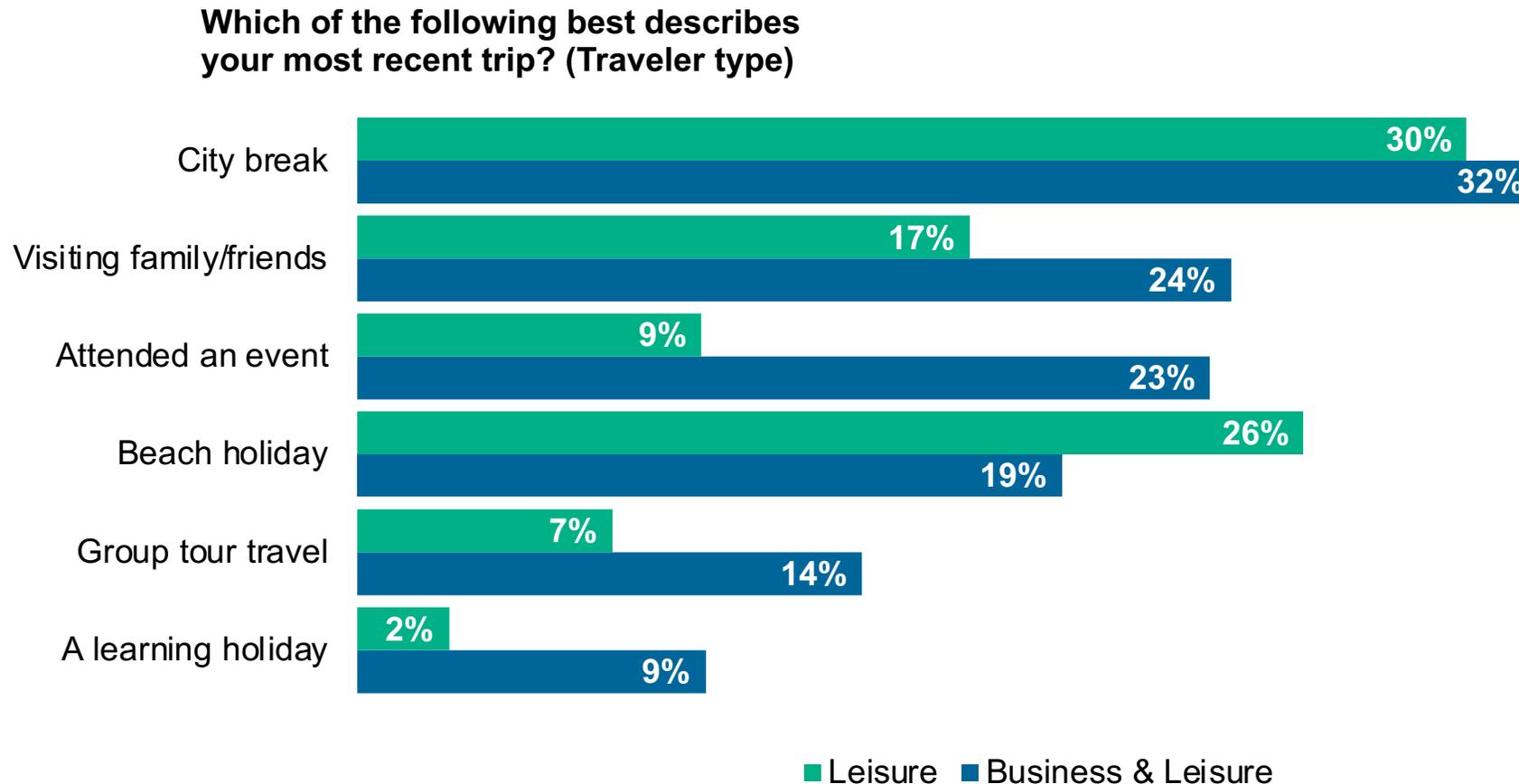


# Combining business and leisure travel



## 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



# 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

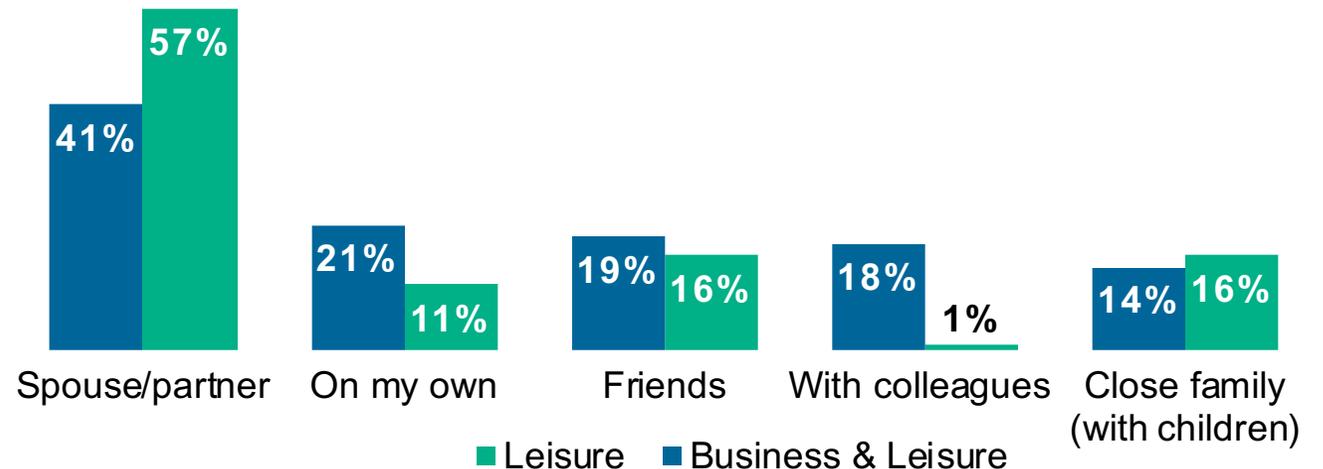
**1.3 countries**

Leisure

**1.3 countries**

Business

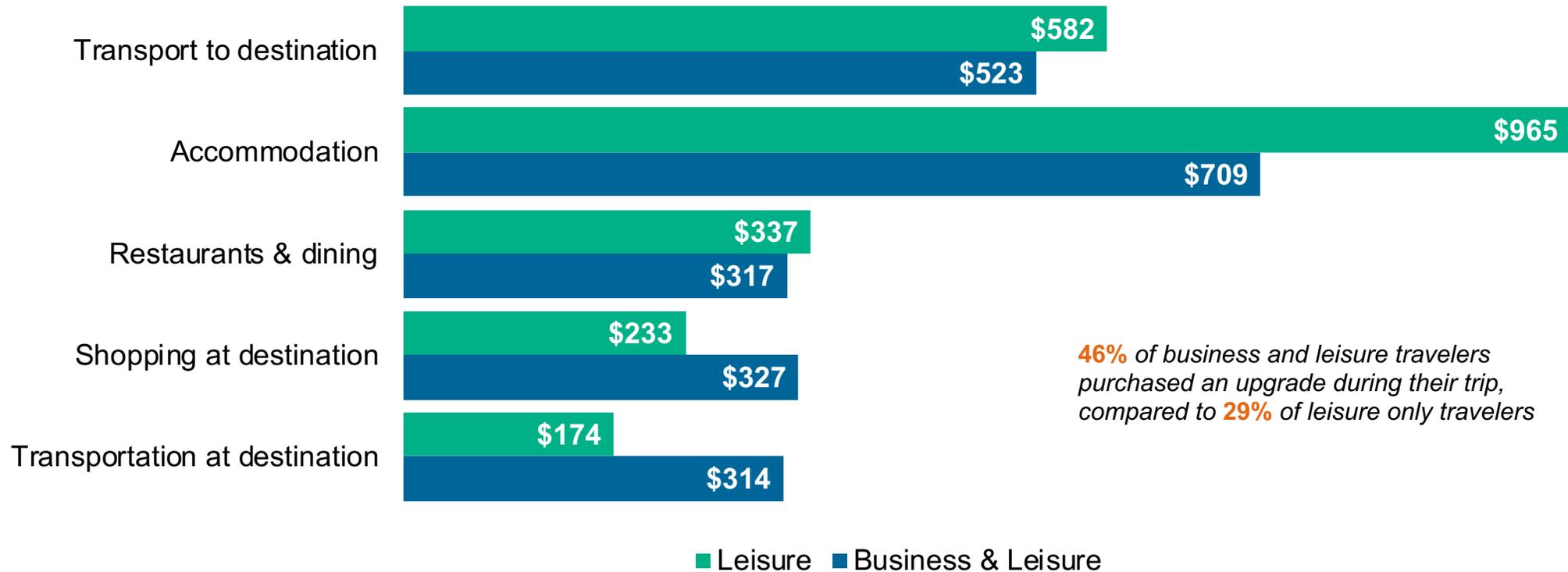
Travel companions



# 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\$)



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



# 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

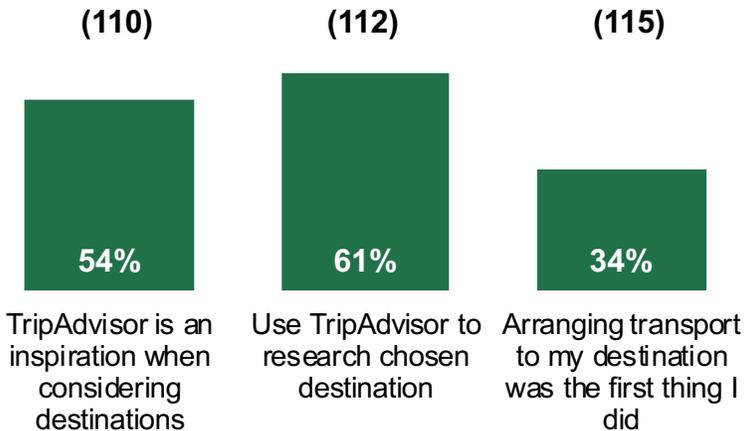
- Only **5%** of travelers go on a Cruise. **Two thirds** of these travelers are +50 years old.
- Cruisers are **twice as likely** to look for a great deal and book quickly than other travelers. They are also more likely than others to travel with their family and their spouse/partner.
- The average 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



One third of travelers arrange transportation at their destination, and are more likely than others to do so

## Accommodation type

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



## Travel companions

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



## Travel mentality

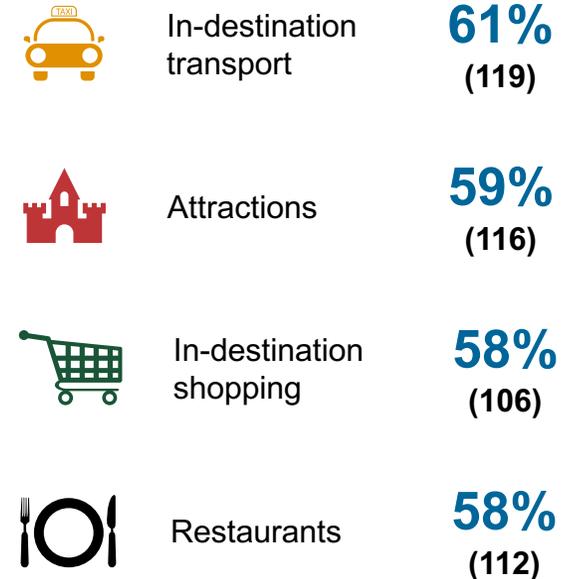
Almost 2 in 3 travelers on City Breaks prefer history and culture while two in five look for excitement during their trip



## Average Accommodation spend



## Using cash for purchases on...



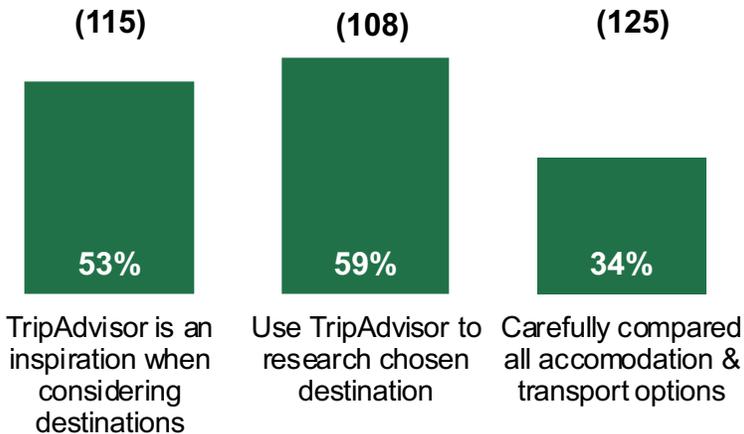
# Beachgoers



# 65%

of Beachgoers are 35-64 years old

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

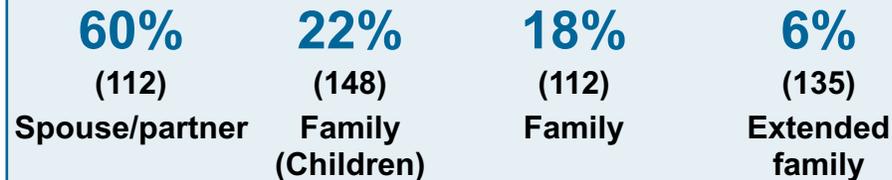
## Accommodation type

Beachgoers are more inclined to stay at resorts and holiday rentals



## Travel companions

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



## Travel mentality

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



## Average Accommodation spend



## Initial prompt for the trip...



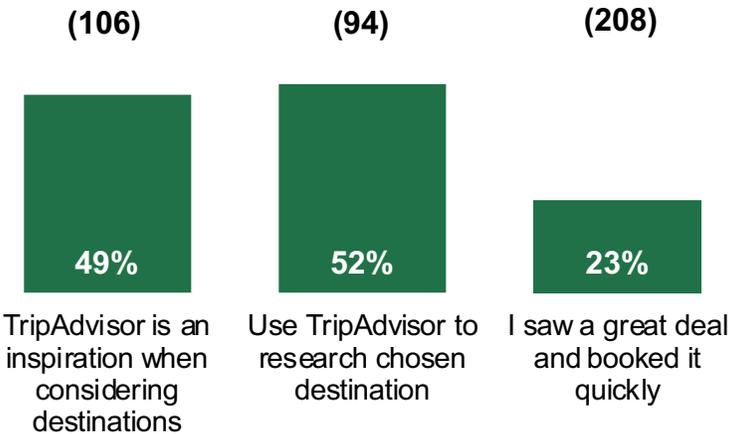
# Cruisers



# 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.



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

## Travel companions



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



## Travel mentality



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



## Average Accommodation spend



## Using cash for purchases on...





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



### TripAdvisor Superfans

## 13%

*Regularly browse TripAdvisor without a destination in mind **and** have been inspired by TripAdvisor to visit somewhere new\**

	Overall	Index**
The perfect trip is spending it on a warm, sunny beach	<b>31%</b>	<b>141</b>
Likely to change destination if find cheaper flight	<b>32%</b>	<b>137</b>
Important to stay in hotels with trusted brand name	<b>39%</b>	<b>135</b>

*Over-indexes for those from Argentina, Brazil, India and Spain  
Average age = 49*



### Cautious Travelers

## 22%

*Destination choice may be affected by concerns over terrorism **and** political climate\**

	Overall	Index**
Important they speak my language at destination	<b>39%</b>	<b>138</b>
Important to stay in hotels with trusted brand name	<b>39%</b>	<b>127</b>
Pay close attention to local exchange rate	<b>37%</b>	<b>123</b>

*Over-indexes for those from Germany, Spain and Japan  
Average age = 52*



### 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\**

	Overall	Index**
Pay close attention to local exchange rate	<b>37%</b>	<b>156</b>
Likely to change destination if find cheaper flight	<b>32%</b>	<b>155</b>
Important they speak my language at destination	<b>28%</b>	<b>145</b>

*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