

# Tripadvisor Market Insights Europe



COMMENTS



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## Travel Trends End of Year 2021

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New Tripadvisor Research





# 1. Travel trends: End of Year 2021

Global and Europe

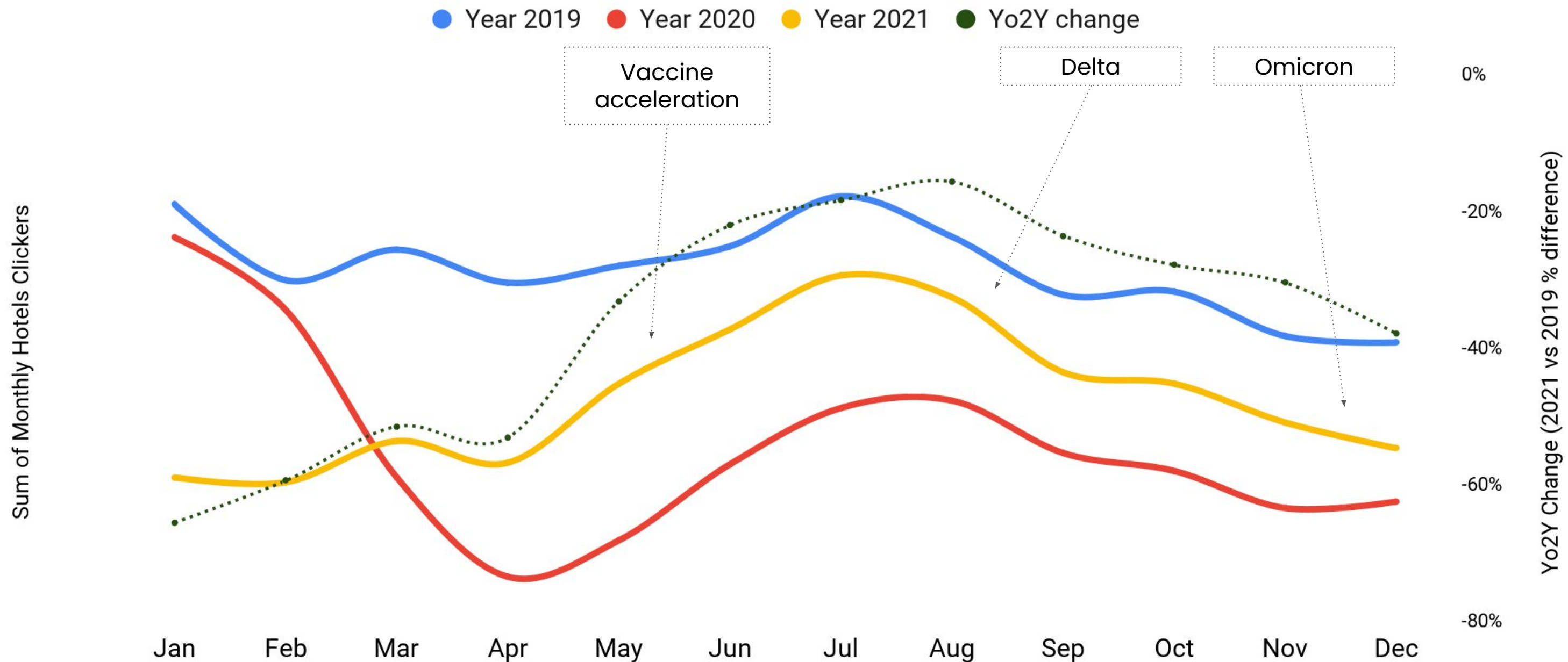


# Looking back at 2021

Starting in April/May, travel intent jumped as vaccine distribution accelerated around the globe - hotel clickers grew at a faster rate than seasonal expectations

However, travel began to subside in August, with the explosion of Delta, which brought hotel clickers to drop at a faster rate than expected based on pre-pandemic, seasonal trends

Daily Hotel Clickers Trending over time | Global | 2019 - 2021

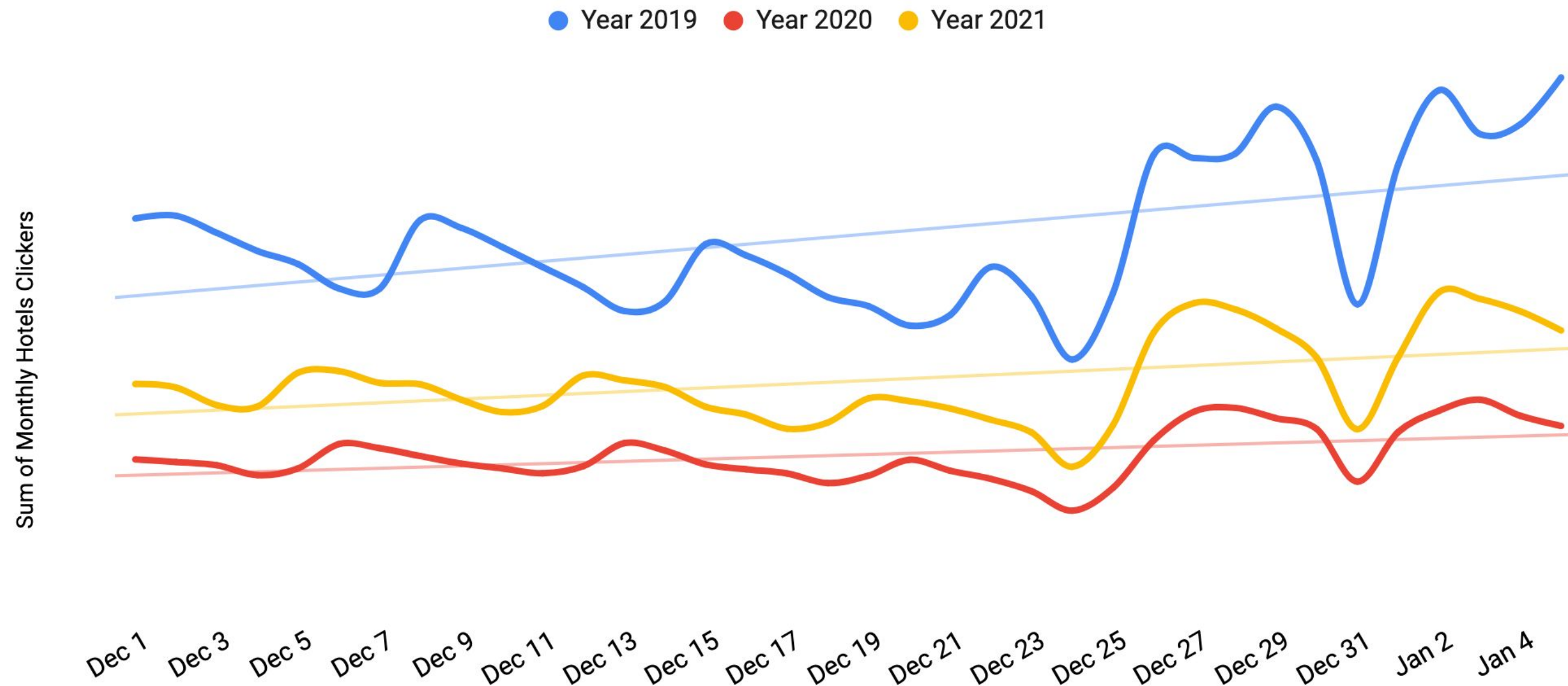


Data based on Hotels Clickers

# Entering the New Year 2022

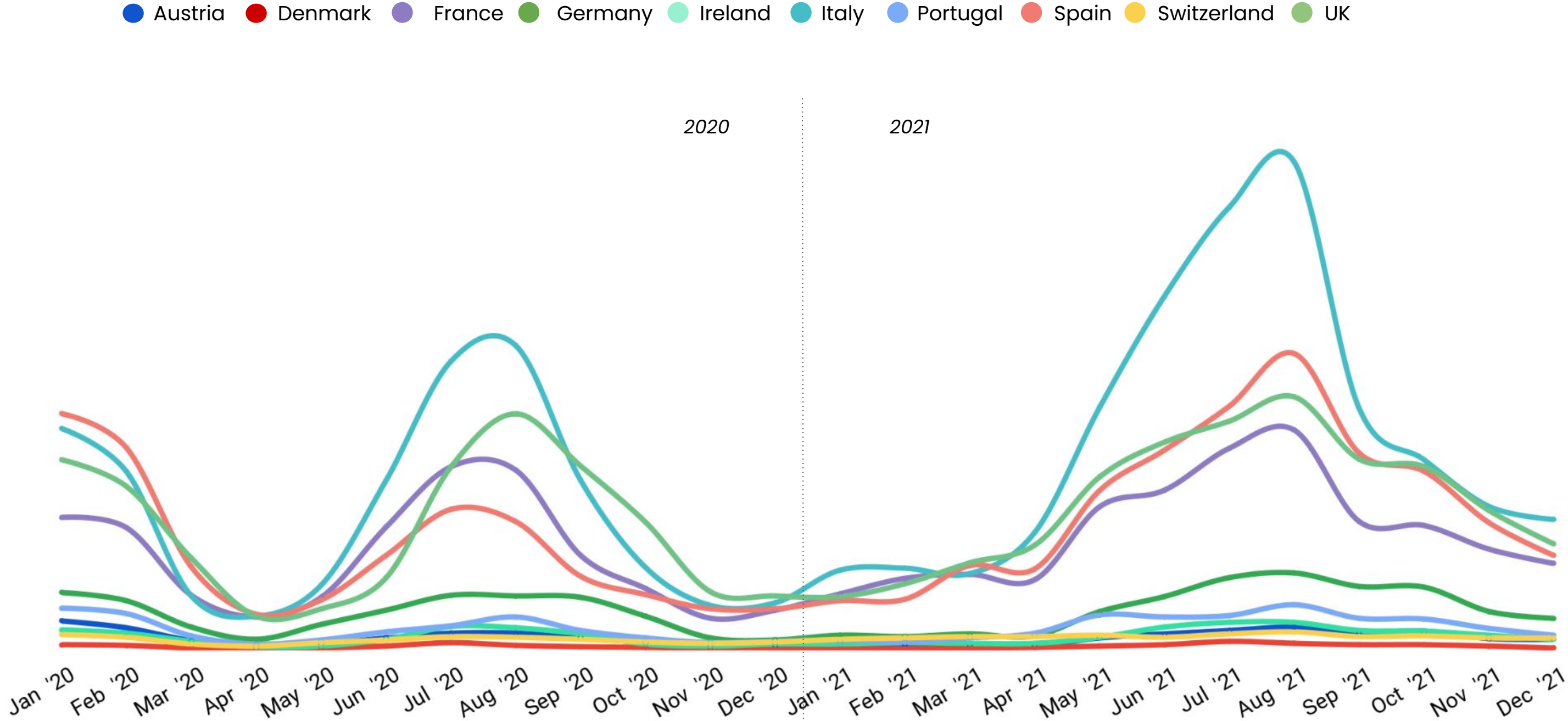
Per seasonal expectations, global travel intent has already begun to show signs of growth – hotel clickers are up +23% MoM.

Daily Hotel Clickers Trending over time | Global | 2019 - 2021



# In the summer 2021, European search accommodation volumes increased as border restrictions were lifted

Monthly Accommodations Pageviews by Market trending 2020 - 2021



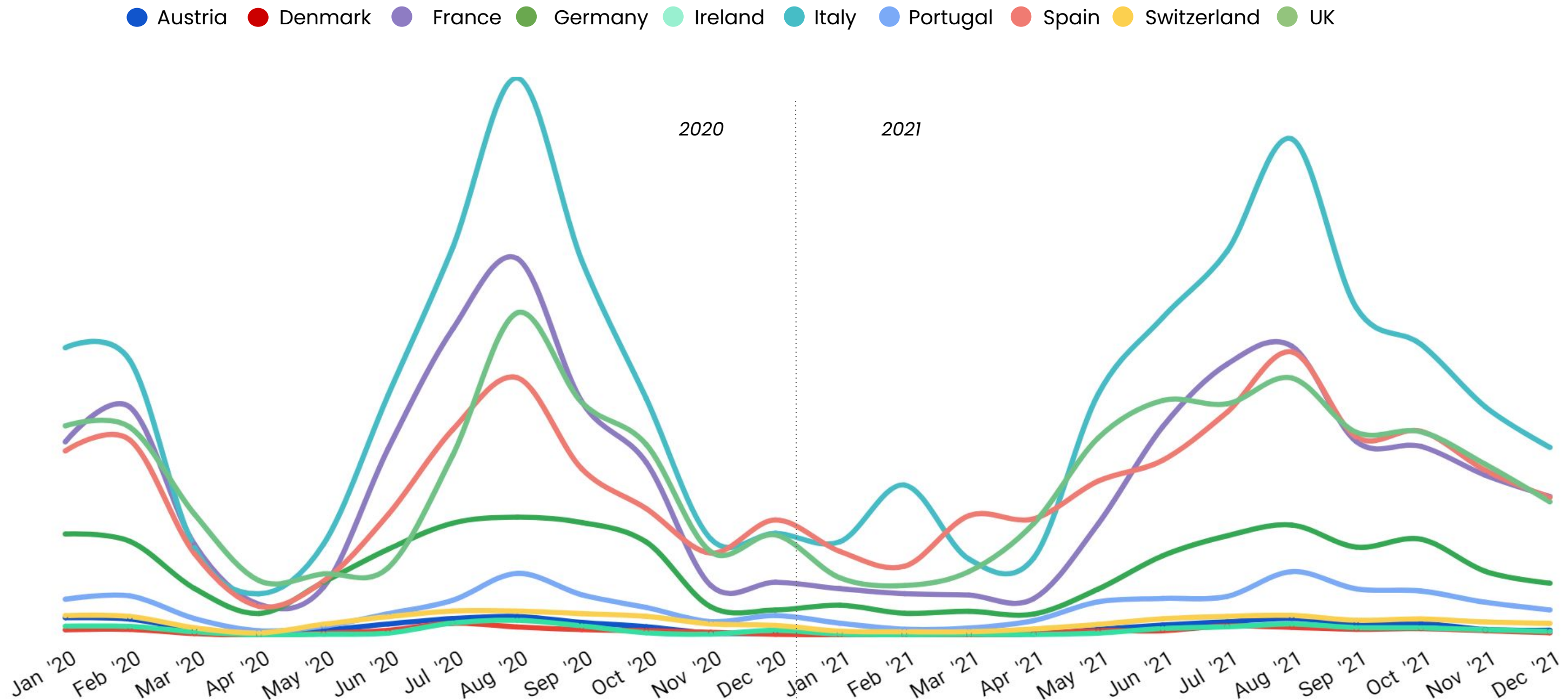
Source: Tripadvisor User Data based on Accommodation Traffic, January 2020 to December 2021



# In spite of growing concerns over new variants, restaurant traffic on Tripadvisor grew in winter

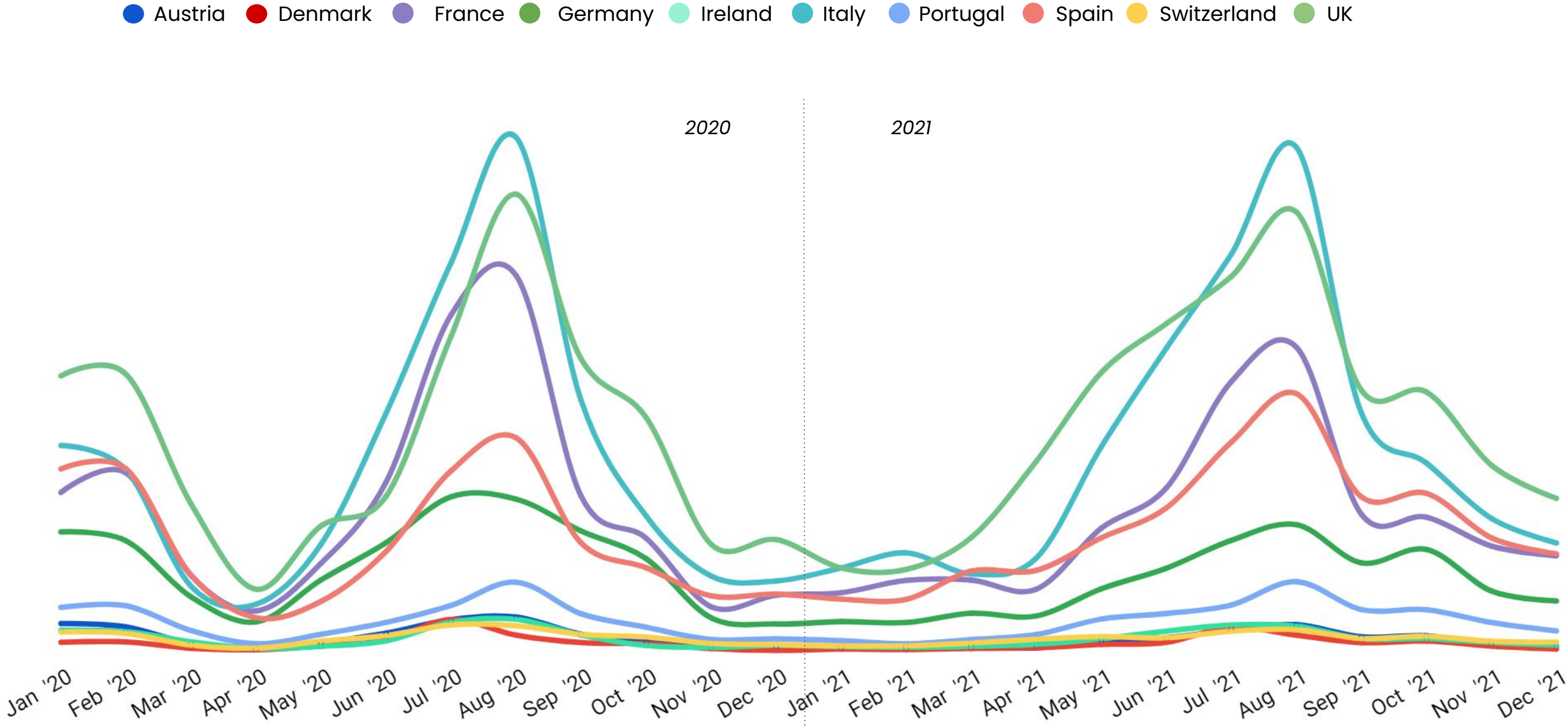
For instance, restaurant traffic in Spain jumped more than +19% since December 2020

Monthly Restaurant Pageviews by Market trending 2020 - 2021



# Similar to restaurant trends, in winter 2021 attractions shoppers grew sharply in comparison to winter 2020

Monthly Attractions Pageviews by Market trending 2020 - 2021



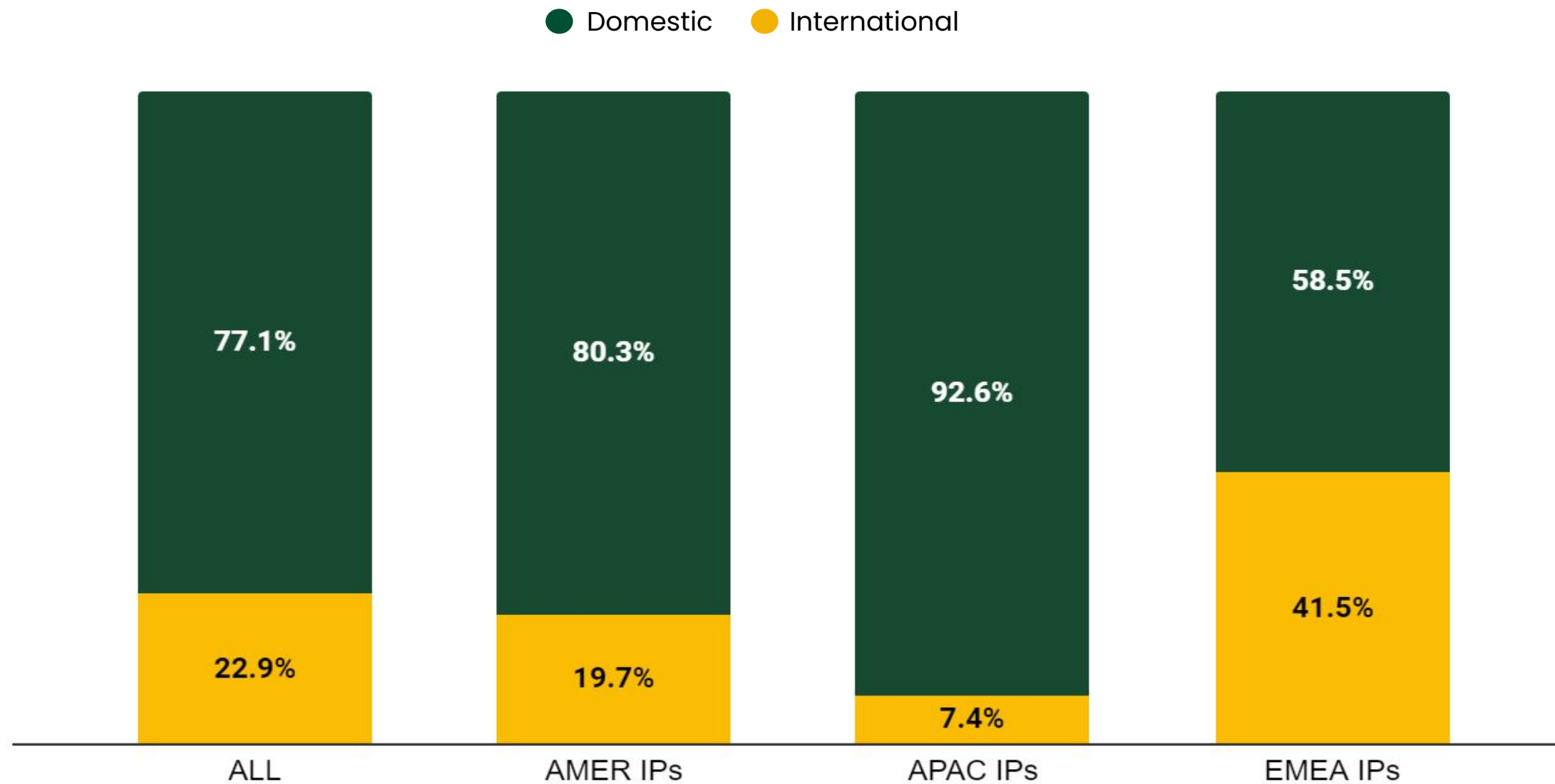
Source: Tripadvisor User Data based on Attractions Traffic, January 2020 to December 2021



# Domestic travel continues to capture the majority share of booking intent in Europe

However, Europe is the continent with the largest share of international travel intent

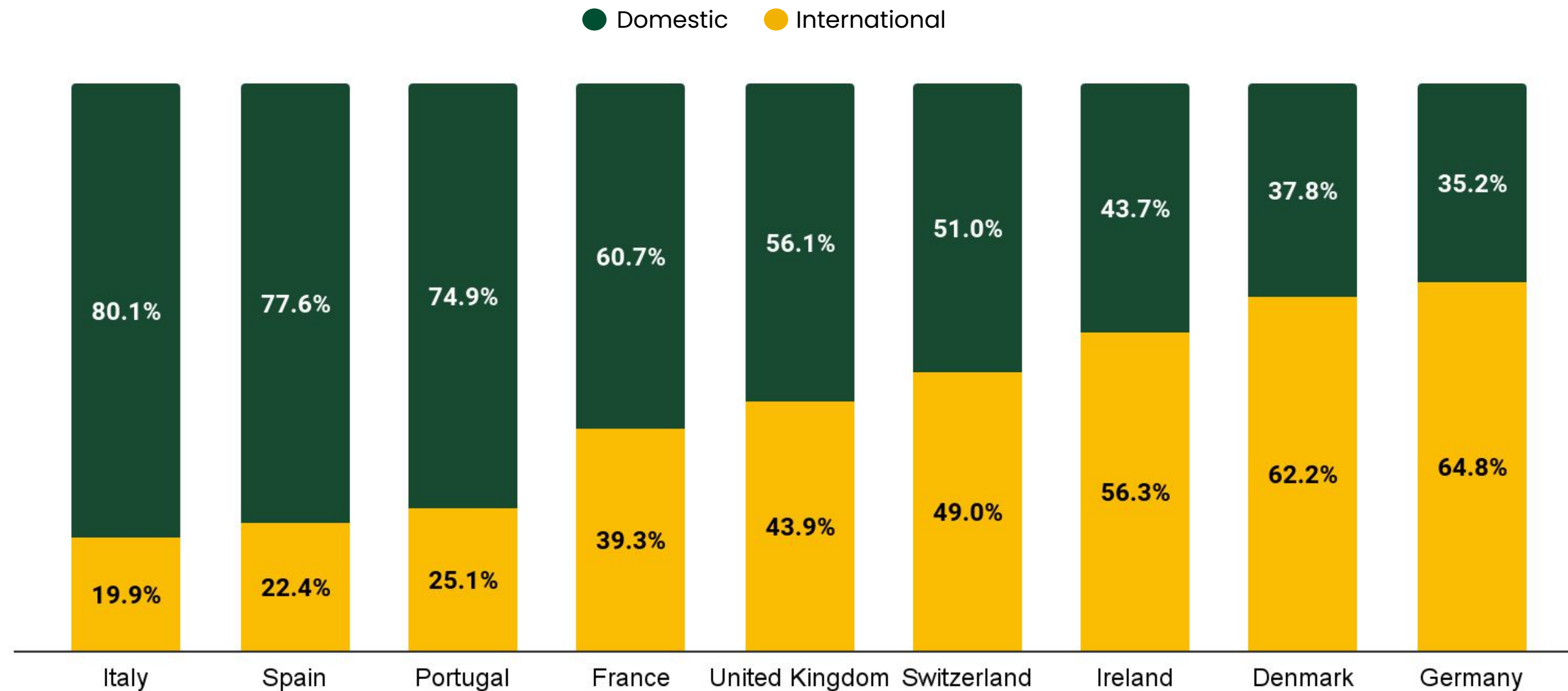
Share Distribution of Travel Intent | December 2021



# The majority of European users are still planning trips to domestic destinations in the first part of 2022

From very domestic-heavy Italians to Germans, with 65% of them currently booking stays abroad

Share Distribution of Travel Intent | EMEA IPs | December 2021





# POPULAR DESTINATIONS



MOST POPULAR	LARGEST MOMENTUM YoY
Dubai, UAE	Cologne, DE
Paris, FR	Antwerp, BE
London, UK	Hamburg, DE
Istanbul, TR	Düsseldorf, DE
Rome, IT	Naples, IT
Madrid, ES	Milan, ES
Barcelona, ES	Madonna Di Campiglio, IT
Amsterdam, NL	Florence, ES
Berlin, DE	Bologna, IT
Costa Adeje, ES	Cordoba, ES
Venice, ES	Magny-le-Hongre, FR
Milan, ES	Verona, IT
Florence, IT	Berlin, DE
Antalya, TR	Frankfurt, DE
Edinburgh, UK	Granada, ES

Considering Destinations in Europe, Middle East and Africa, GEOs across Germany populate the very top of the list of destinations growing fastest in travel intent YoY, with Cologne taking the lead as the GEO with the strongest travel intent growth since December 2020.



# POPULAR FILTERS



Popular Filters
Hotels & Motels – Lodging Type
4 Bubbles and Up
5 Star
Free Breakfast
Pool
All Inclusive – Parent
Free Cancellation
4 Star
Free Wifi
Luxury

**'Hotel & Motels'** is the most popular filter used on Tripadvisor when choosing a property in Europe, followed by **'4 Bubbles and Up'** and **'5 star'**.

As safety and security continue to be a greatest concern when planning a trip, the share of users interacting with the **'Free Cancellation'** filter on site remains on the top 10 most used filters.





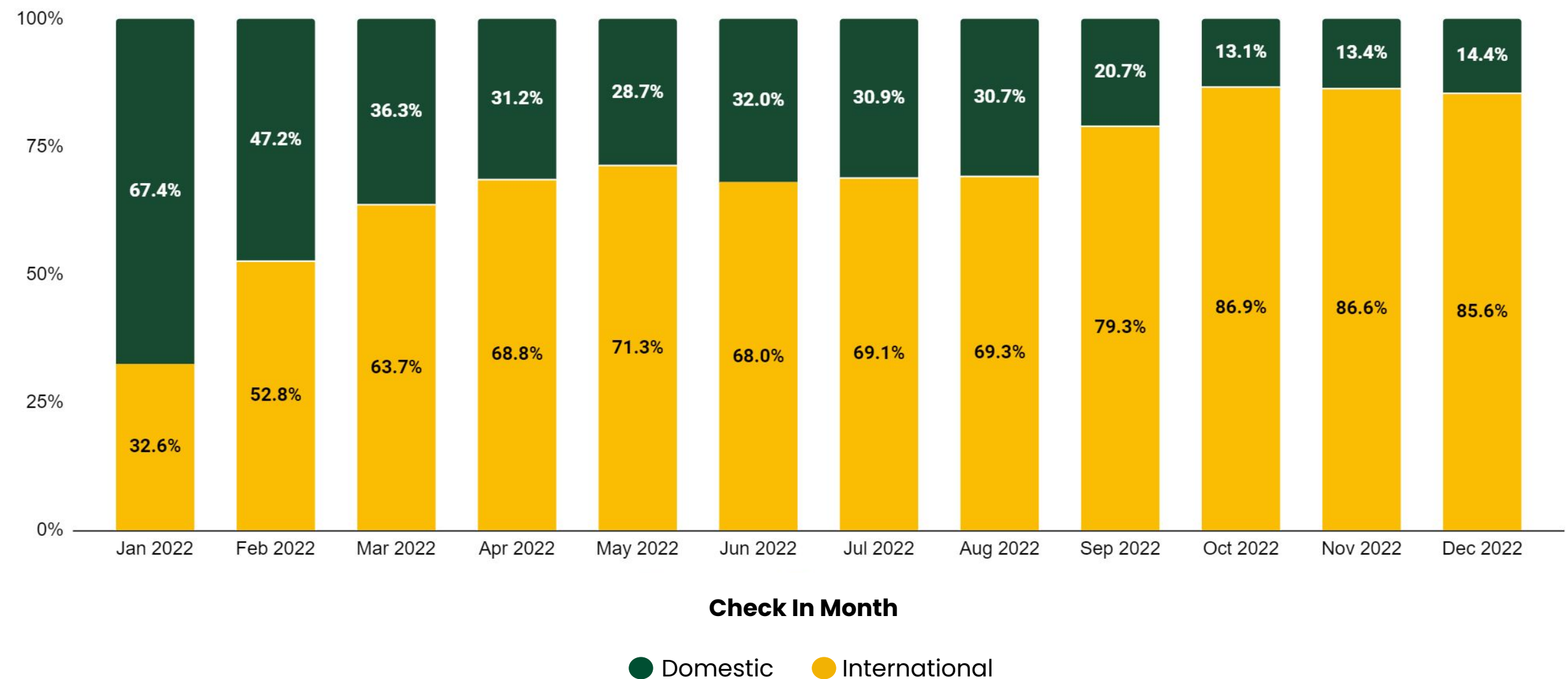
# After a start of the year in which domestic trips will be preferred options for European travellers, international destinations will dominate the rest of 2022

How to read this chart:

**Domestic:** 68% of all consumers clicking to book stays this month (Jan 2022) are looking at domestic destinations

**International:** 71% of all consumers clicking to book stays for May 2022 are planning to travel internationally

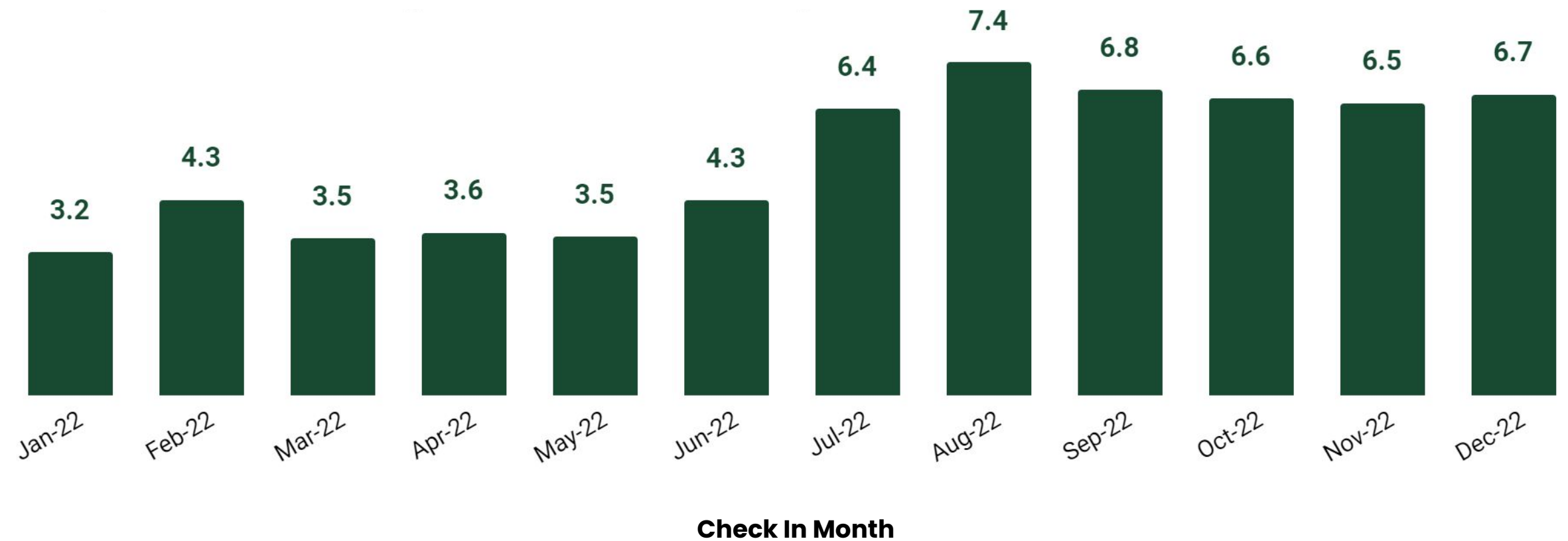
**Distribution of travel intent by check-in month: domestic vs international**  
Data based on European IPs, data based on users searching for hotels > Dec 1, 2021



# European users are most eager to book longer stays from July 2022

While shorter booking windows are still common in the early 2022, in the second part of the year, travellers are planning to book longer trips (6.7 days).

Countries IPs Searches from Dec 2021





# 2. Travel in 2022: A Look Ahead

Markets: Australia, Japan, Singapore, United Kingdom, United States

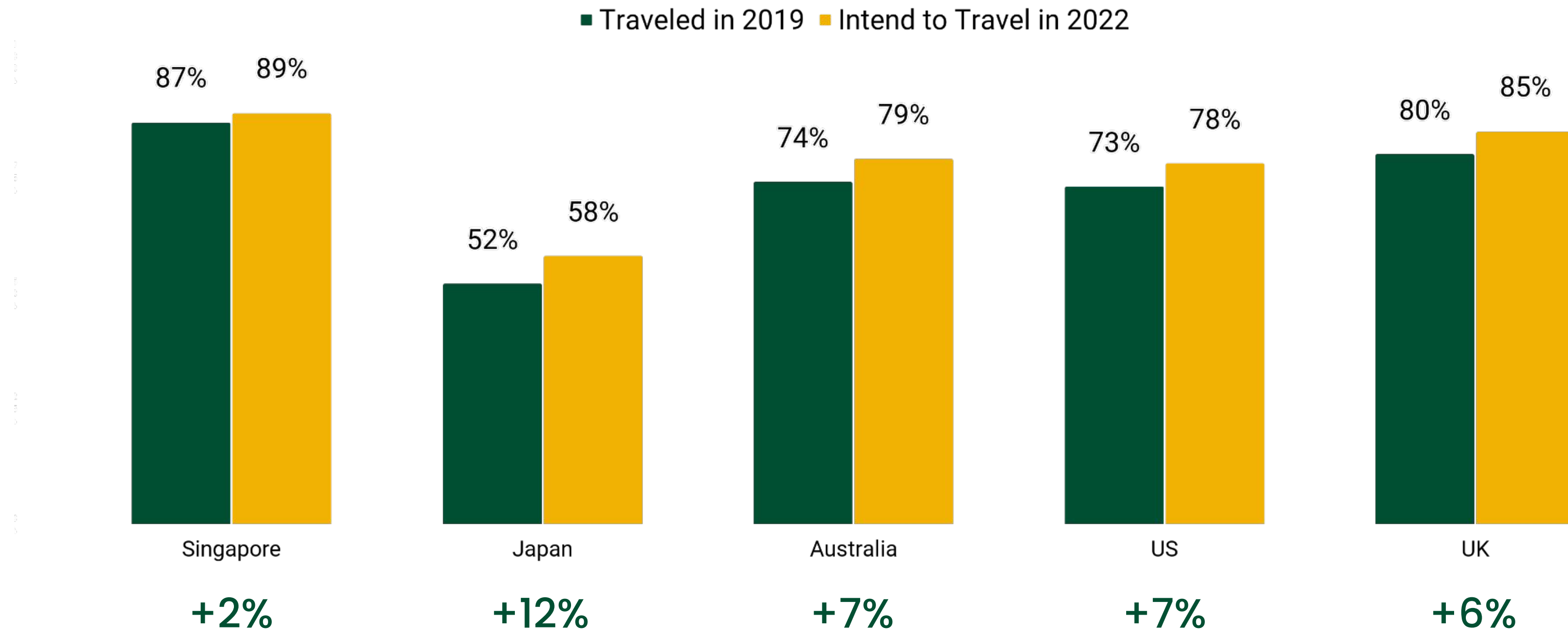




A Bright 2022



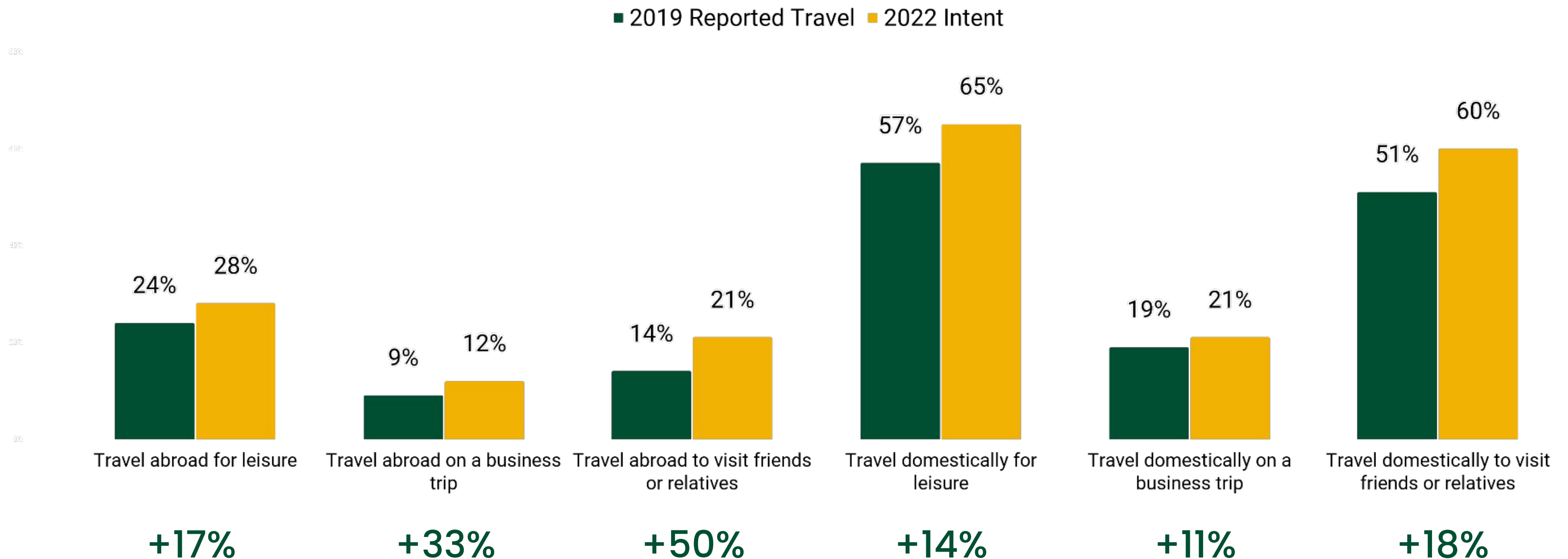
# 2022 travel intent is higher than 2019 travel in all 5 countries surveyed



# Travel intent in 2022 is up by double digits from 2019 across all surveyed travel categories

Traveling domestically for leisure is the #1 reason consumers intend to travel in 2022

After a long two years of isolation, it's no surprise that traveling internationally to visit friends or relatives sees the highest intent increase, at +50%





# International and domestic business travel intent is up from 2019



**Business travel** is anticipated to be a **key travel priority** in the 5 markets surveyed in 2022

**33%** Intent for international business travel is up 33% for 2022 vs. 2019



**11%** Intent for domestic business travel is up 11% for 2022 vs. 2019





# A Taste for New Adventures



# The craving for these new experiences is higher than it was pre-pandemic

Markets: AU, JP, SG, UK, US

Respondents from the 5 markets surveyed want to venture out to the new

40%

consider going places they've never been before **MORE important than they did in 2019**

38%

consider going somewhere very different to where they currently live **MORE important than they did in 2019**

33%

consider immersing themselves in authentic local experiences **MORE important than they did in 2019**

Q: For the next question please compare the trips you took in 2019, before the COVID-19 pandemic, to those you plan to take in the future. When planning trips in 2022 or beyond, are each of the following more important to you now, less important to you now or is there no change? A: Net more important

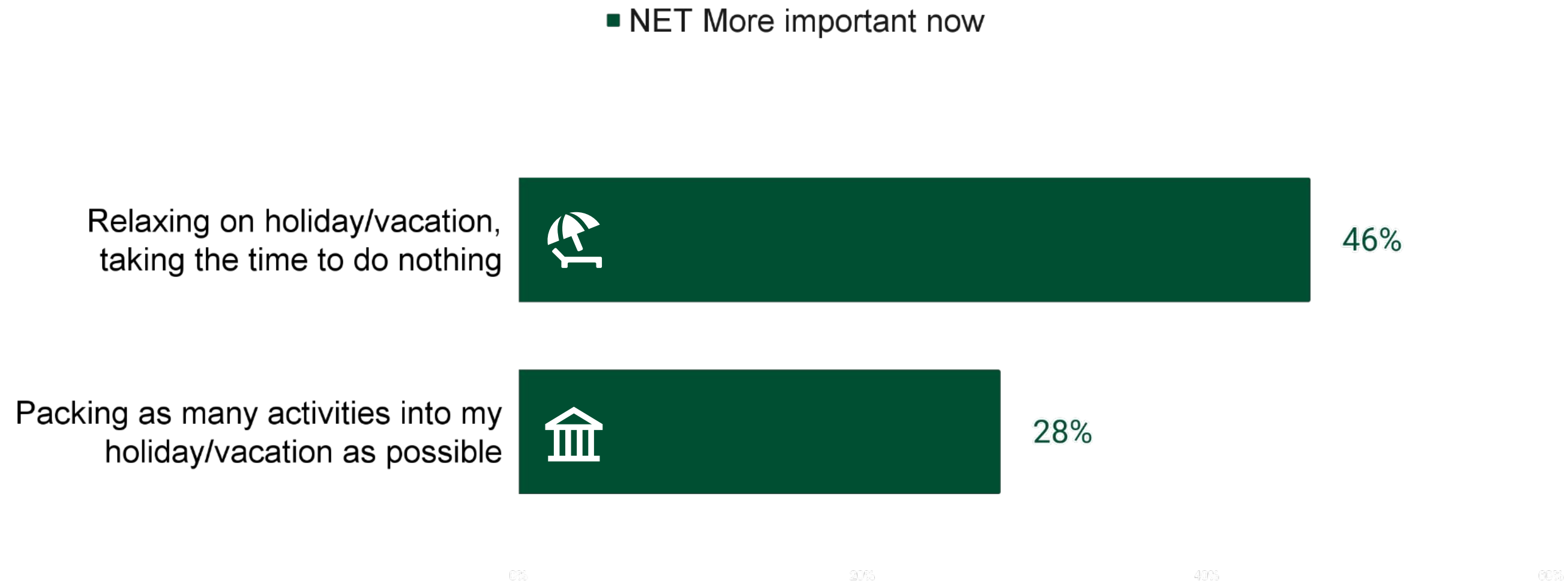




# Respondents crave relaxation more than they did pre-pandemic

Close to half of respondents think it's more important to relax and disconnect on vacation vs. packing as many activities in as possible

Q: For the next question please compare the trips you took in 2019, before the COVID-19 pandemic, to those you plan to take in the future. When planning trips in 2022 or beyond, are each of the following more important to you now, less important to you now or is there no change?



# Splurging on a big trip is more important than it was pre-pandemic



# 28%

of respondents think splurging on upcoming trips is **more important** than it was in 2019

Younger respondents, and men, in particular:

A full **44%** of respondents aged 18-24 think it's more important to splurge on a big trip than it was previously

**32%** of male respondents think it's more important to splurge on a big trip, compared to **24%** of female respondents (a **33%** difference)

Q: For the next question please compare the trips you took in 2019, before the COVID-19 pandemic, to those you plan to take in the future. When planning trips in 2022 or beyond, are each of the following more important to you now, less important to you now or is there no change? Splurging on a big trip



# Experiential Travel



# Respondents seek experiential and immersive travel

The majority of respondents surveyed want to experience a range of activities in their next vacation: instructional, cultural, culinary, and immersive

Q. Below is a list of activities that some people do when travelling for leisure.

Thinking about each activity, would you prefer to do it individually, as a group activity, as both an individual and group activity or would you not do it at all?

## Would do this activity



Exploring the food & drink offerings of a destination

80%

Visiting local landmarks or cultural attractions  
(e.g. museum tours, architecture tours, etc.)

76%

Attending traditional arts and culture events  
(e.g. traditional music and dance, etc.)

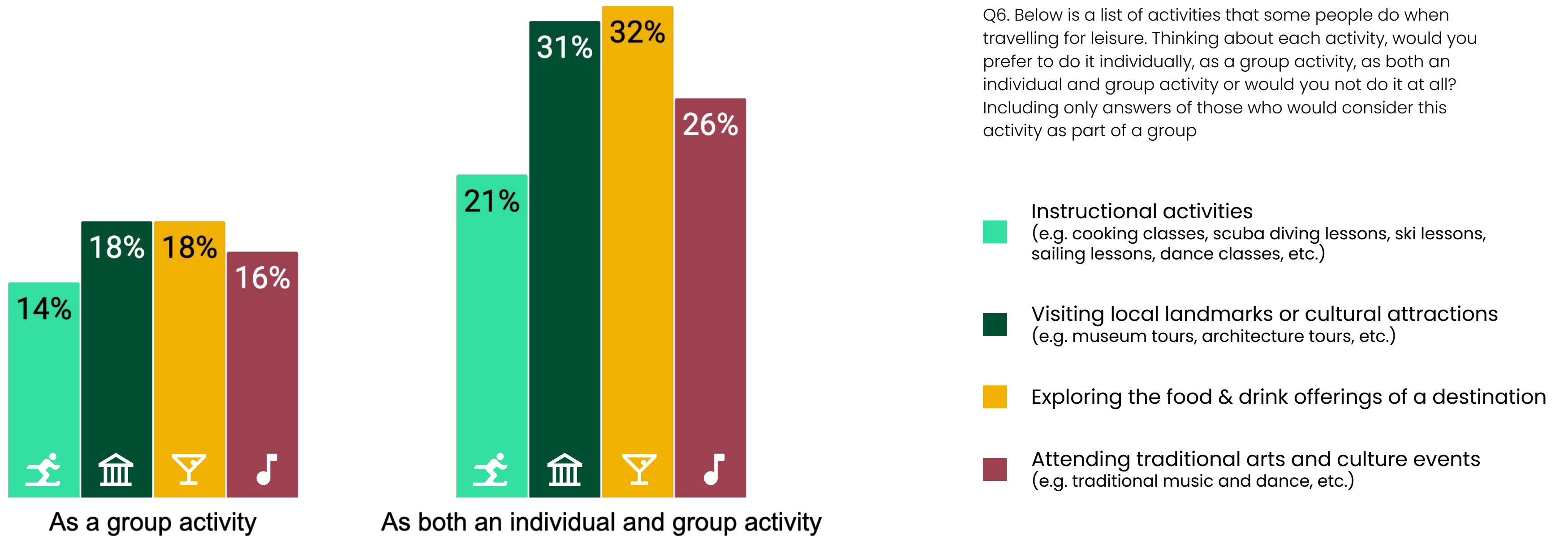
63%

Instructional activities  
(e.g. cooking classes, scuba diving lessons, ski lessons, sailing lessons, dance classes, etc.)

52%

# And many want to have those experiences with others

A high number of respondents want to explore a destination as part of a group as well as individually

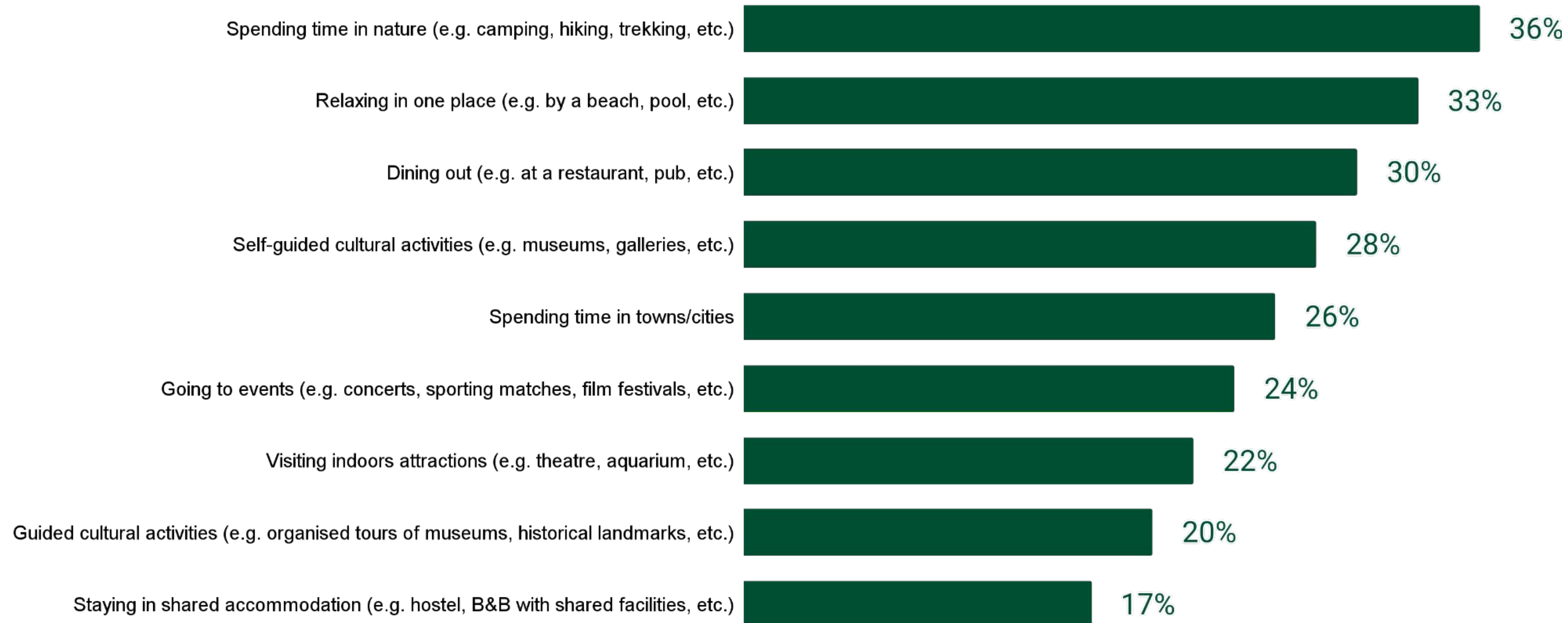


Q6. Below is a list of activities that some people do when travelling for leisure. Thinking about each activity, would you prefer to do it individually, as a group activity, as both an individual and group activity or would you not do it at all? Including only answers of those who would consider this activity as part of a group



# Travel intenders want to do more of a range of activities than they did pre-pandemic

Q: For the next question please still compare the trips you took in 2019, before the COVID-19 pandemic, to those you plan to take in the future. When planning trips in 2022 or beyond, **will you do more of the following, less of the following or will you do about the same amount?** **A: More**





# The Long Reach of COVID

# Closer escapes: Respondents consider domestic travel more important now than pre-pandemic

While we are seeing the biggest **increases** in international travel intent, domestic travel remains more popular

44%

Staying in my country rather than going abroad



22%

Going abroad instead of staying in my country

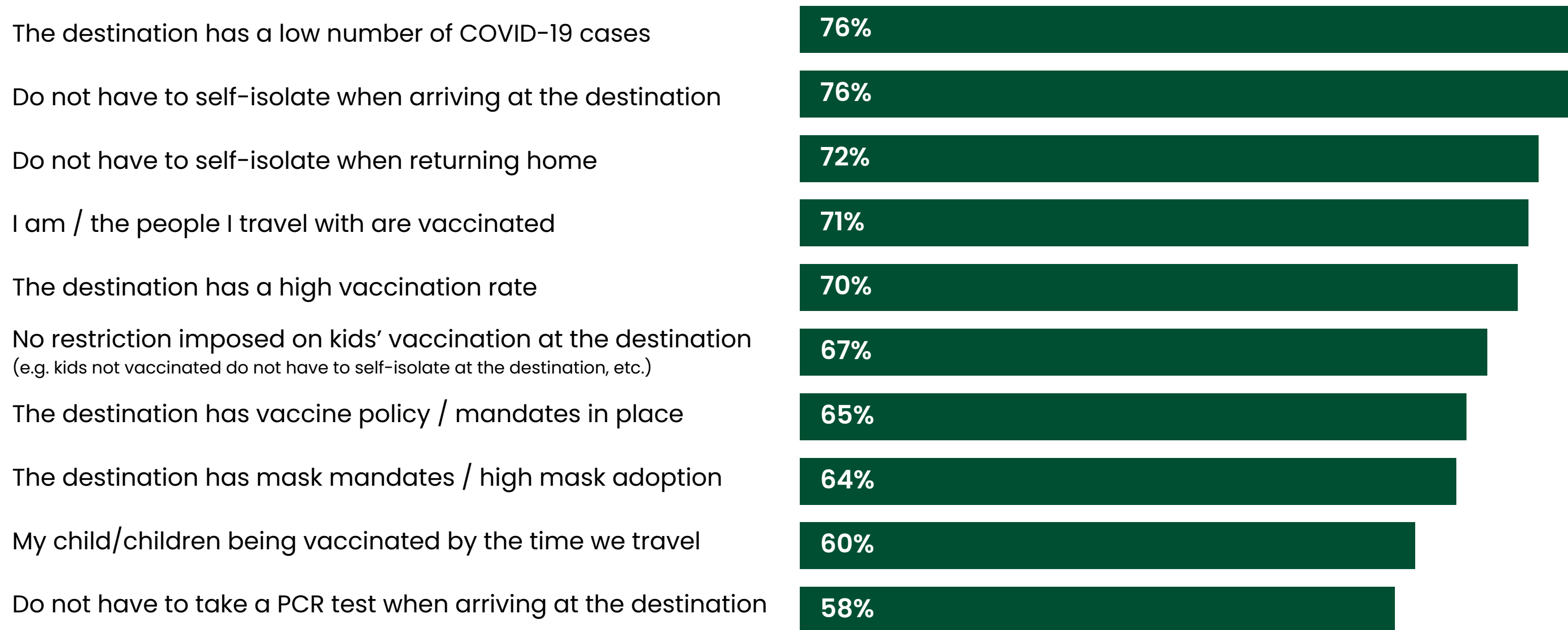


Q: For the next question please compare the trips you took in 2019, before the COVID-19 pandemic, to those you plan to take in the future. When planning trips in 2022 or beyond, are each of the following more important to you now, less important to you now or is there no change? - Summary

All adults who travelled for leisure in 2019



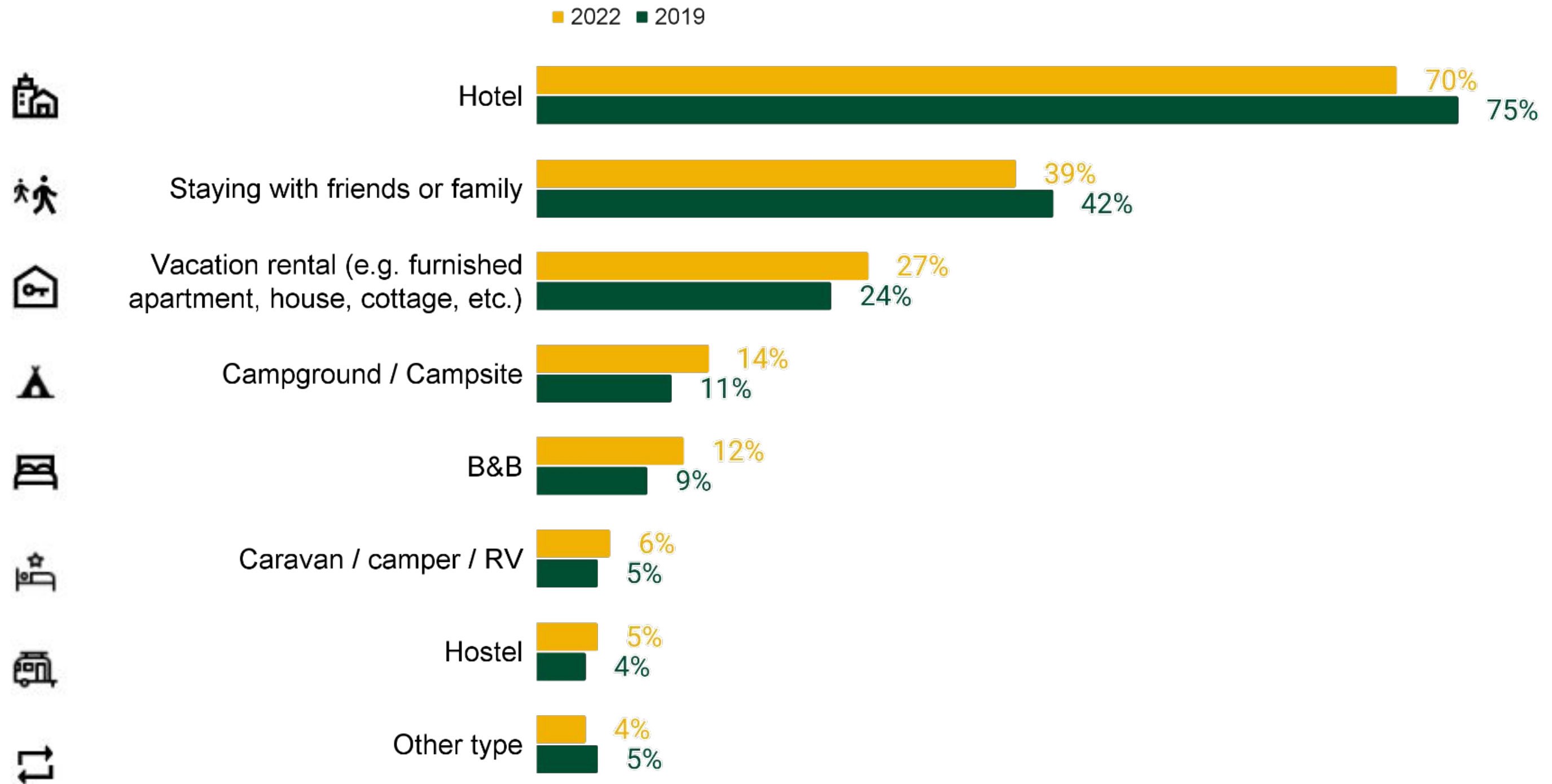
# Travelers consider a range of COVID-related factors important in their decision-making



Q: Please now think about any future travel plans you may have, in 2022 or beyond. How important, if at all, are the following factors when making decisions about your next travel destination? Top 2 Box responses

# Preferred accommodation intent shifts from 2019

Understandably, hotel stays as well as staying with friends and family are down from 2019. Conversely, rentals, campsites and B&Bs are up. In order for hotels to recapture share, they need to address people's ongoing safety concerns.



# Safety and cleanliness measures will continue to be important factors in travel, even once restrictions are lifted and cases drop worldwide



When travelling for leisure, I will continue to wear a mask even after COVID-19 restrictions are lifted

56%

I would like to see safety measures in place at hospitality businesses, even after COVID-19 cases have dropped worldwide (e.g. hand sanitizer, perspex sneeze screens, track & trace, etc.)

67%

Cleanliness measures of a hospitality business will be an important factor in my travel making decisions, even after COVID-19 cases have dropped worldwide

71%

Q10. To what extent do you agree, or disagree, with the following statements about the next 12 months?

All Adults aged 18-75 in UK, USA, Australia, Japan, Singapore

Source: Tripadvisor & Ipsos Mori Travel in 2022: A Look Ahead; N=10,390; Australia, Japan, Singapore, United Kingdom, United States; 11/01 - 11/06 2021



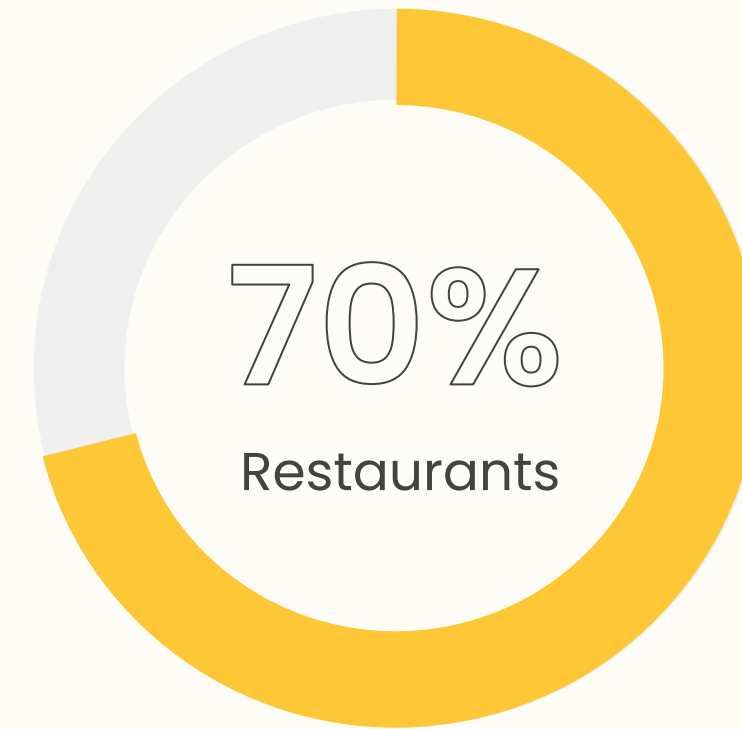
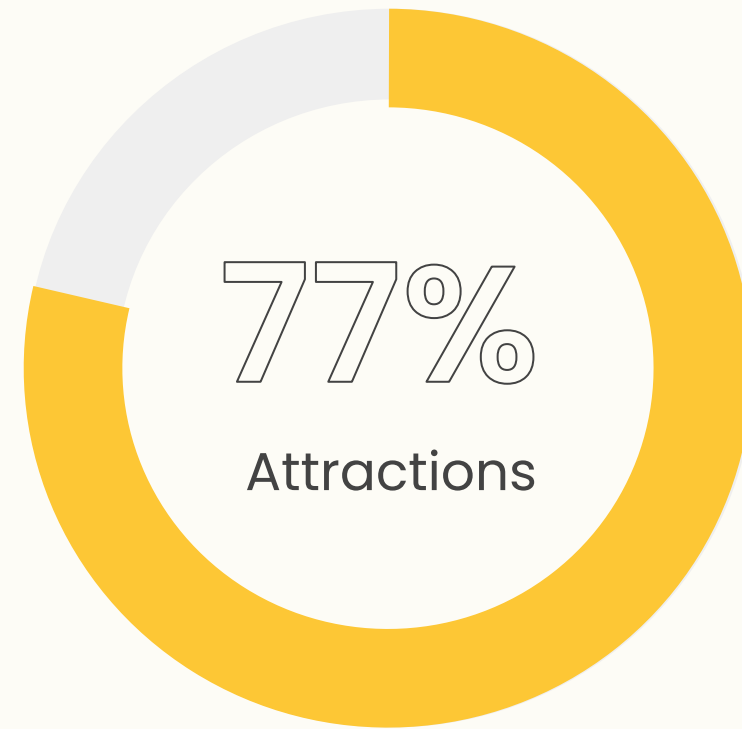
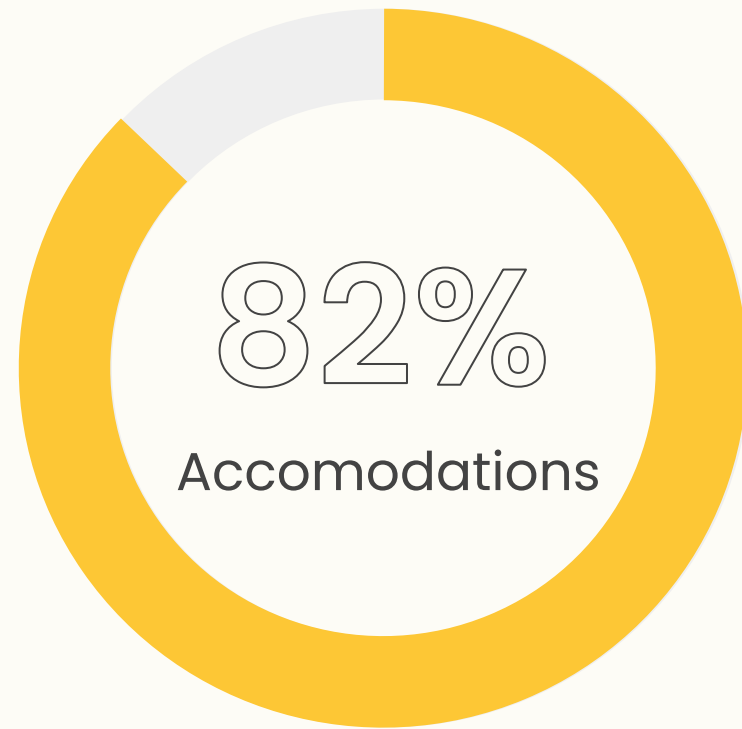
# 3. Power of Reviews:

How Tripadvisor reviews lead to bookings and better travel experiences



# Online reviews remain a key driver to planning and decision making

Extremely or very important



▲/ ▼ indicates statistically higher or lower than other 2 regions at 95% confidence

Q2.2 In general, how important are online reviews when you're looking for an accommodation to book? (N=3000)

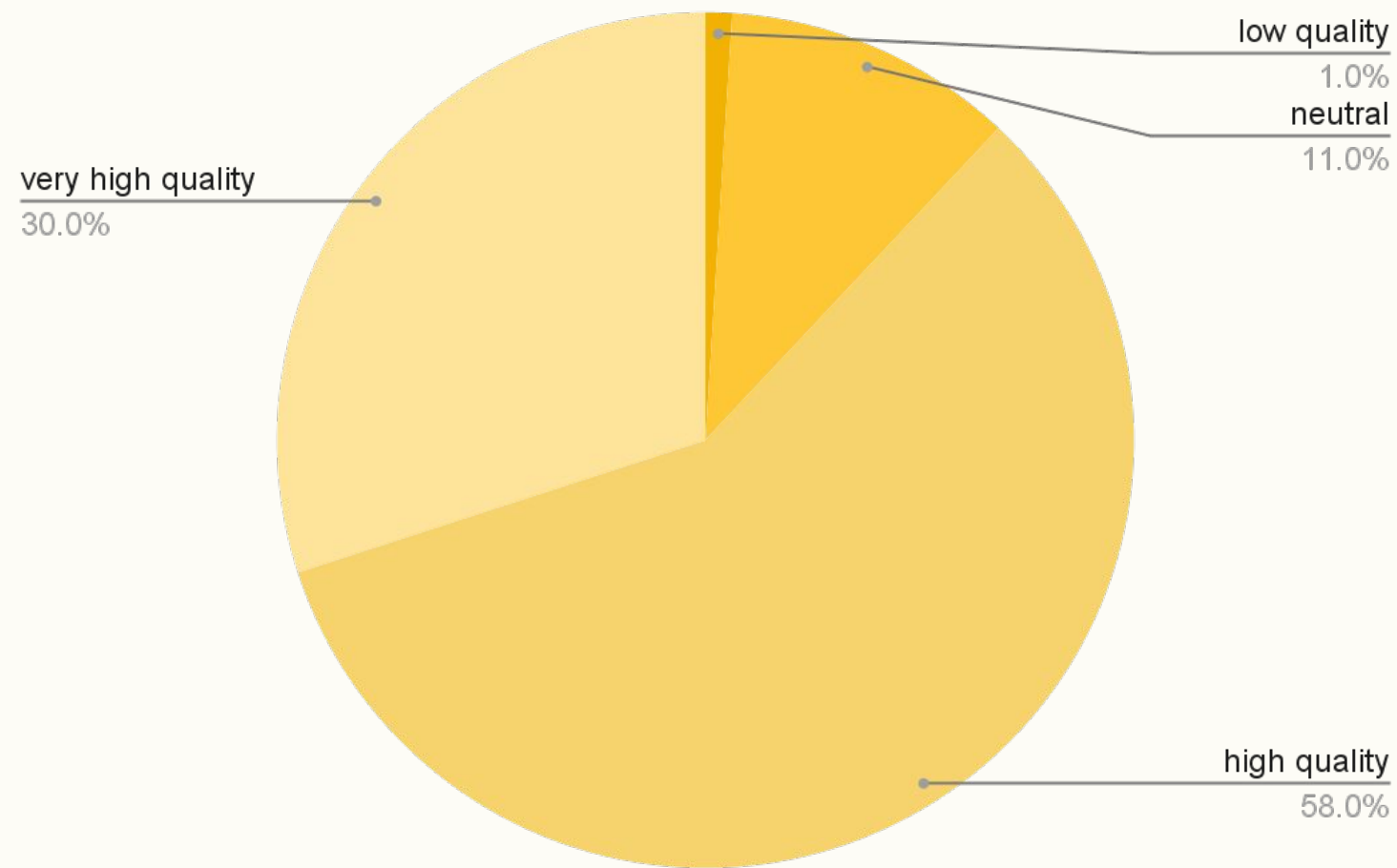
Q4.2 In general, how important are online reviews when you're looking for an attraction to book? (N=2999)

Q6.2 In general, how important are online reviews when you're looking for a restaurant to book? (N=3001)

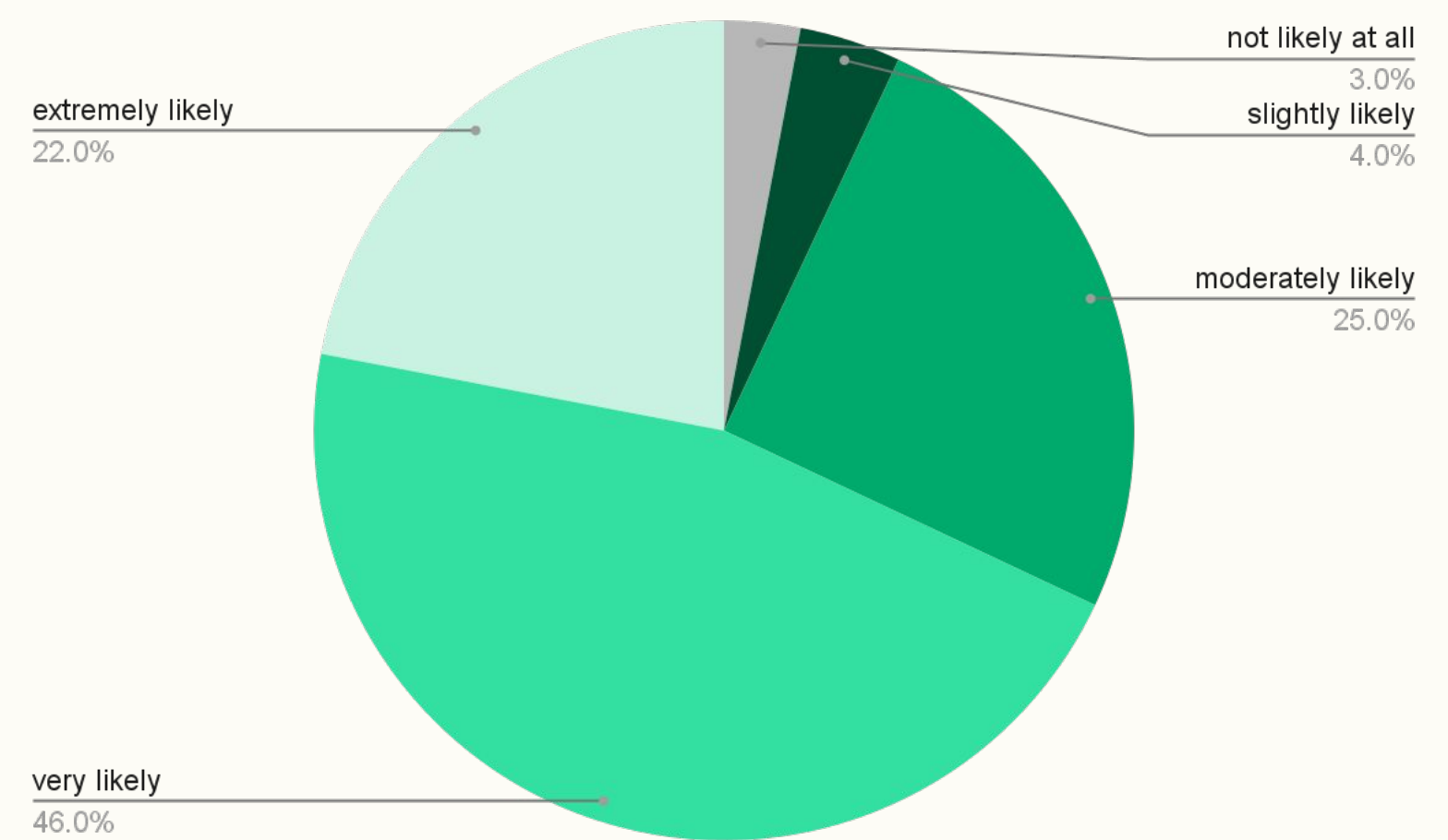


# Long form reviews influence the planning and decision making stages the most - in comparison to ratings or snippets - and long form reviews lead to bookings

Quality of review



Likely to Book Accommodation



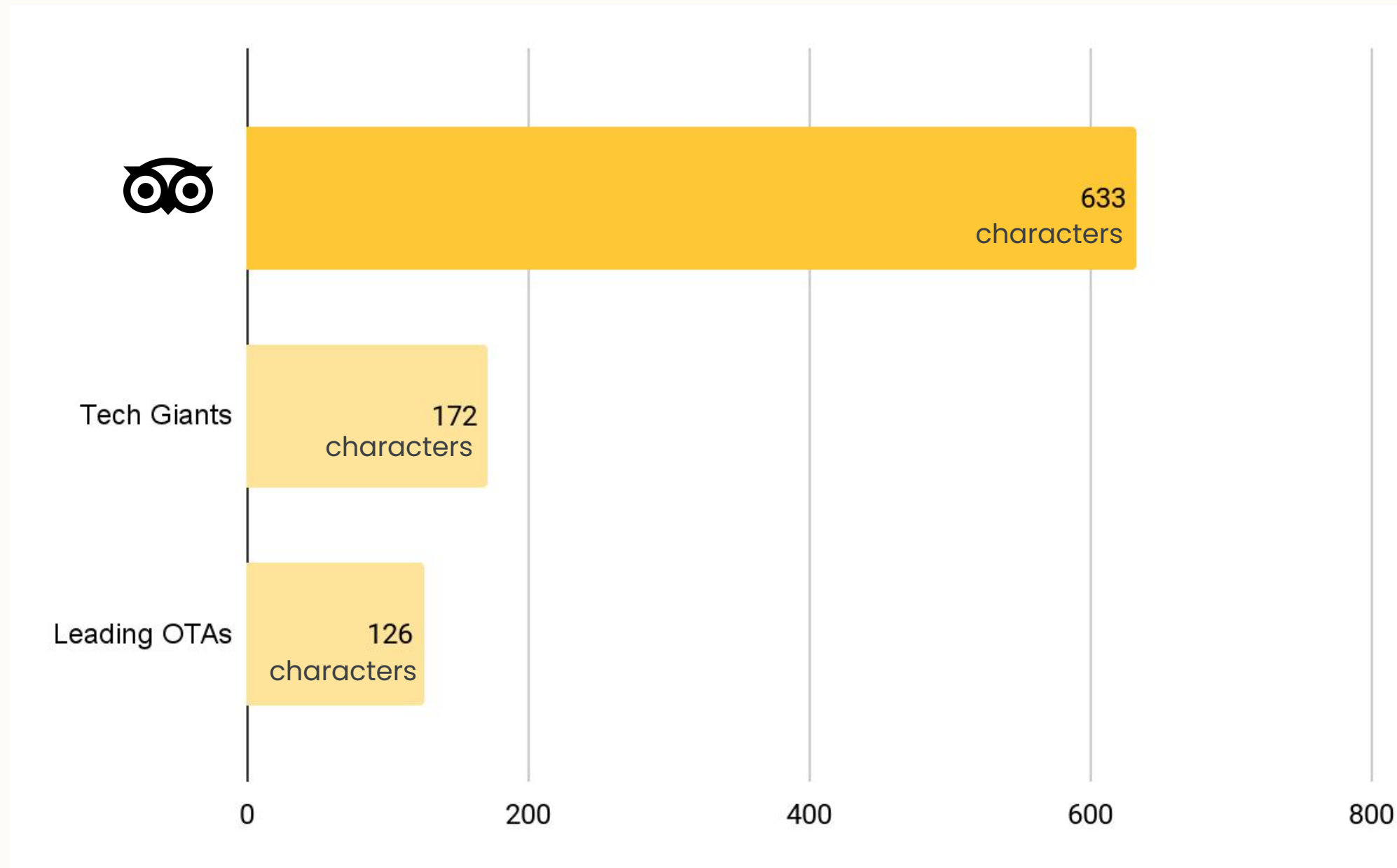
88% of respondents rated long form reviews as of high or very quality.

68% would be very or extremely likely to book the accommodation after seeing a long review.





# Tripadvisor's review are 3 times longer than competitors



Tripadvisor is winning the category of longer user generated content for accommodations:

- Tripadvisor users generate 633 characters per review (about 90-160 words; or 4-11 sentences)
- Competitors generate less than 175 characters per review (about 20-40 words; or 1-3 sentences)
- Benchmark: Average Amazon review is about 582 characters



# Most reliable

In a 2021 Owners survey, hospitality business owners identified Tripadvisor as the most reliable platform when talking about long and detailed reviews

Q: Rank the following review platforms according to how many detailed customer reviews of your business can be found on each



Booking.com

Google

Facebook

Yelp

Expedia

TheFork

OpenTable





THANK  
YOU