Fish where the Fish Are!

Worldwide Findings

Summary of size and reach

Largest

TripAdvisor is the largest travel property worldwide with

Visit

An estimated 1 in every 11 users worldwide visited TripAdvisor in July 2017

Process

80% of buyers who visit TripAdvisor during the purchase process worldwide take longer than 4 weeks to complete their purchase

Purchase

TripAdvisor reached 60% of all worldwide users examined who started their decision process and subsequently booked travel online in Q2 & Q3 2017

Engagement

Travel transactors who use TripAdvisor engage with more sites. Their path to purchase research is 29% longer than non TripAdvisor users

Source: comScore Data Services
TripAdvisor – World’s Largest Travel Site

455M average unique monthly visitors **

49 Markets Worldwide

570M Reviews and Opinions

7.3M Accommodations, Restaurants and Attractions

*Source: TripAdvisor log files, average monthly unique visitors, Q3 2017
**Source: comScore Media Metrix for TripAdvisor Sites, worldwide, July 2017
About TripAdvisor

TripAdvisor is the world’s largest travel site*

270+ New contributions per minute
147,000 Destinations
137M Marketable Members
780,000 Vacation Rentals

*Source: TripAdvisor log files, average monthly unique visitors, Q3 2017
**Source: comScore Media Metrix for TripAdvisor Sites, worldwide, July 2017
TripAdvisor: Worldwide

TripAdvisor is the world’s largest travel site

Source: comScore October 2017
TripAdvisor: India

TripAdvisor is 3rd largest travel site in India

Source: comScore October 2017

Excluding Mobile Data

TripAdvisor | 13% of the Travel Market
Our Global Partnership – “4 Pillars”

MARKETING
Working with the destination to create a targeting campaign to engage travellers to discover the destination

CONTENT
Looking to help the destination grow their content to showcase their destination

EDUCATION
Supporting each destination with seminars to educate the travel industry on how to use TripAdvisor

ANALYTICS
Providing in-depth analysis on current trends relevant to the destination
TripAdvisor and VisitScotland deal 'could bring £150m tourism boost'
DEAL ALERT! The next three months are the best-value time to visit India, according to TripAdvisor hotel booking data. Click to discover the best times to visit other popular destinations: [http://bit.ly/2ntrzVs](http://bit.ly/2ntrzVs)
This was how it was!

How has it changed?

- Think back to your holiday?
- Searching through books, library
- Searching through libraries
- Slides shows from friends
Please remember to rewind!

WARNING! If this label is broken, you must purchase this video.
Let’s rewind to 1999
Digital Omnivores on the Move

26% of U.S. consumers are digital omnivores

80%
More than 80% of all consumers are multitasking while watching TV

50%
Nearly 50% are purchasing more online than they consume

93%
93% of all consumers say home internet access is their most valued household subscription

Deterior and mature are the new kid on the virtual block. Today 70% of boomers say the main value of social networking sites is that they allow interaction with more friends, more frequently.

#SocialTrending

Renting is the new owning

Over the next 12 months, more than twice as many consumers plan to rent rather than own video entertainment.

State of the Media Democracy: A multigenerational view of consumer technology, media and telecom trends can be found at www.deloitte.com/us/tmtrends

Deloitte
Mobile Travel

- Smartphones and tablets are here to stay.
- M-commerce is leading the way
- Think social–local–mobile.
- “digital omnivore” – users move seamlessly between phone, tablet, computer and television and use the devices in a complementary way.
Emerging Marketing Have Higher Proportion of Connected Travelers

If your guests tend to come from the following markets, you should consider investing more in mobile markets:

- Thailand – 65%
- China – 65%
- Brazil – 59%
- Indonesia – 59%
- Malaysia – 53%
- Italy – 49%
- USA – 48%
- India – 47%
- Australia – 47%
- Russia – 44%

Source: TripBarometer Connected Traveler Report, March 2015
DESTINATION MARKETING OR MANAGEMENT
One Size Doesn’t Fit All
DMO

- Europe & APAC mainly Government sub-vented
- North America is part funded
- Normally has a board made of Industry players
- Subject to Fiscal year behaviour
- Transparent reporting

**TOP 5 PUBLIC FUNDING SOURCES**

1. Hotel Room Tax
2. TID/Marketing District Assessment/ Voluntary Marketing Fee
3. Other County/City/State/Province Tax Fund Sources
4. Special Restaurant Tax
5. Other National Tax Funds
What is your role?

- Destination Awareness
- Development and Improvement of Tourism Products
- Impacting Economic and Sustainable growth in the region
- Supporting Industry Stakeholders
Missions, Goals and Tools

MISSIONS:
- Bringing Travelers to their Destination
- Developing Tourism Products
- Supporting Industry/Stakeholders
- Impacting Economic Growth

METRIC GOALS:
- Economic Results
- Awareness
- Arrivals

TOOLS
- Structural Re-organisation
- Shift focus to current trends/technology
- Utilize insights/data to achieve audience awareness
KNOWING THE SPACE YOU ARE PLAYING IN
Search-Shop-Buy-Share

Online penetration

Figure 4: Search-Shop-Buy-Share Online Penetration

Question: Which of the following, if any, have you done online (via desktop or laptop computer, tablet or smartphone) for your leisure travel in the past 12 months. Select all that apply.
Base: Leisure Travelers: U.S.: (N=1,003); U.K.: (N=1,008); AUS: (N=1,011); FRA: (N=1,007); GER: (N=1,007); RUS: (N=995); CHN: (N=1,014); BRA: (N=1,000)
Note: Totals may not add to 100% due to rounding.
Source: Phocuswright's Search, Shop, Buy: The New Digital Funnel
From Dreaming to Sharing

<table>
<thead>
<tr>
<th>Stage</th>
<th>Customer Needs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dream</td>
<td>Destinations that fit his/her lifestyle, travel history, family circumstance, budget, social needs</td>
</tr>
<tr>
<td>Search</td>
<td>Choice, price transparency and flexibility to mix and match, social media recommendations. Search requires both web search and deep links into apps that contain relevant data</td>
</tr>
<tr>
<td>Shop</td>
<td>Tools that aggregate contextualized content, provide accurate price comparisons and minimize the hours it takes today to shop for travel</td>
</tr>
<tr>
<td>Buy</td>
<td>Accept multiple forms of currency, change/cancellation/refund rules, travel insurance, medical emergency repatriation and in destination activity bookings</td>
</tr>
<tr>
<td>Experience</td>
<td>Parking, gate and security line information, airport merchant offers. In destination information, transportation, Uber, things to do and see, in destination booking, places to eat and party.</td>
</tr>
<tr>
<td>Share</td>
<td>Dialogs and postings on social media</td>
</tr>
</tbody>
</table>

Phocusright
Travelers Journey

Information  Impact  Attainment
Most Trips are Destination-led

How did you start planning this trip?

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Began comparing destinations</td>
<td>30%</td>
</tr>
<tr>
<td>Decided on a specific destination</td>
<td>45%</td>
</tr>
<tr>
<td>Researched flights or transportation</td>
<td>7%</td>
</tr>
<tr>
<td>Researched hotel or accommodation</td>
<td>5%</td>
</tr>
<tr>
<td>Booked flight or transportation</td>
<td>4%</td>
</tr>
<tr>
<td>Booked hotel or accommodation</td>
<td>3%</td>
</tr>
</tbody>
</table>
Of those who didn’t start with a destination

42% Start by booking flights

42%
Start by looking at or booking flights

30%
Start by looking at or booking accommodation

12%
Just travelled to their destination
Destination is a popular starting point, but a sizeable number of travelers start their path to purchase journey elsewhere.

Three in ten travelers start their booking pattern by comparing destinations, whilst almost half (45%) already have a destination in mind when they start booking.
Culture, cost and climate are key draws when choosing a destination

- 31% of travelers select a destination for its culture
- Almost half (47%) of travelers choose a destination because of price
- One in five travelers state that weather was an important factor in choosing their destination

Top ten reasons for choosing a destination

- Experience the culture/society/people: 31%
- Accommodation had a good price: 22%
- For the weather: 20%
- Recommended by a friend/relative: 16%
- Flight had a good price: 16%
- Family-friendly: 15%
- Cheap holiday/vacation option: 14%
- Great for my age group: 12%
- Family ties: 11%
- A good price for a luxury destination: 10%
Traveller typologies

**Value Seekers**
- **17%**
- “Help us make the most of our vacation”
- **Age:** 25-34
- **Household Income:** Medium
- Traveling with: Children

**Luxury Travelers**
- **19%**
- “Show me how to enjoy and spend my money”
- **Age:** 25-49
- **Household Income:** High
- Traveling with: Spouse/partner

**Social Travelers**
- **16%**
- “Let us share and engage with others”
- **Age:** 25-49
- **Household Income:** Medium - high
- Traveling with: Children
Traveller typologies

**Independent Travelers**
31%

“Help me find my own way”

*Age: 25-49*

*Household Income: Low / high*

*Traveling with: Solo*

**Researchers**
35%

“Help me plan the perfect trip”

*Age: 25-49*

*Household Income: High*

*Traveling with: Spouse/partner*

**Habitual Travelers**
7%

“Help minimise time researching, but provide me with peace of mind”

*Age: 35-64*

*Household Income: Low*

*Traveling with: Solo*
18 – 34 Year’s Old Behaviour

38% Digital word of mouth are particularly influential for younger travellers

22% Travelers in the 18-34 age group are more likely to choose a destination based on recommendations

35% Began comparing destinations during the research phase

TripBarometer 2016.
Air-Con!

Nearly two in three travellers consider air-conditioning in hotels a ‘must-have’ and nearly half will look elsewhere if in-room Wi-Fi isn’t included in the accommodation price.
Connected Traveller

• Millennials are more likely to consider the inclusion of in-room Wi-Fi and breakfast in the accommodation price as deal-breakers

• One-quarter of travellers will consider alternative accommodation if swimming pools are not on offer

• Three in five Chinese will not book an accommodation that does not offer free in-room Wi-Fi.
Tea Time

Nearly one-third of travellers will look elsewhere if accommodation doesn’t have a kettle, with Indians, Australians and Indonesians the most likely to consider it a deal-breaker.
Snap Happy

Most likely to take a camera
• Russia
• Canada
• France
• Argentina
• Austria
Retail Therapy

- Indonesia
- Argentina
- China
- Malaysia
- Mexico
Best Dressed

• South Africa
• Canada
• Ireland
• New Zealand
• India
Germophobic

Consider hand sanitizer an essential travel item
1. India
2. Australia
3. Canada
4. South Africa
5. United States
RESEARCH AND PLANNING ARE KEY
Power of Insights

Information  Planning  Development
JOURNEY STEPS

DEFINING THE DESTINATION

RESEARCHING + BOOKING KEY ELEMENTS

PRE-TRIP PLANNING

ON-TRIP

DREAMING OF THE NEXT TRIP
Already thinking about next trip!

**Awareness**
- Not planning... but open to inspiration

**Consideration**
- Starting the process

**Comparison**
- Short list of hotels

**Booking**
- Flight -> Hotel

**Experience**
- Actively on vacation

**Advocate**
- Reviews, Facebook, WoM

**Week -20+**
- "Not Yet Ready"

**Week -16:**
- 5 Destinations
- 0 Hotels

**Week -12:**
- 3 Destinations
- 6 Hotels

**Week -4:**
- 1 Destination
- 15 Hotels

**Week 0**
- Booked

Book Additional Activities
- Restaurants
- Attractions
- Tours, etc.
Looking at 2016 August and 2017 same period there has been a 30% increase in travellers consuming Asia Pacific Content
Top Asia Pacific Destinations

Top Ten Destinations
• Japan
• India
• Thailand
• Australia
• Indonesia
• China
• Philippines
• Malaysia
• Vietnam
• Taiwan

TripAdvisor Internal Insights October 2017
Top Cities in Asia Pacific

- Bangkok, Thailand: 17%
- Taipei, Taiwan: 7%
- Seoul, South Korea: 6%
- Kyoto, Japan: 6%
- Kuala Lumpur, Malaysia: 6%
- Ho Chi Minh City, Vietnam: 6%
- Osaka, Japan: 5%
- Chiang Mai, Thailand: 5%
- Melbourne, Australia: 5%
- Hanoi, Vietnam: 5%
- Siem Reap, Cambodia: 4%
- Shanghai, China: 4%
- Patong, Thailand: 4%
- Seminyak, Indonesia: 4%
- New Delhi, India: 4%
- Da Nang, Vietnam: 2%
- Beijing, China: 3%
- Nha Trang, Vietnam: 2%
- Bengaluru, India: 2%
- Jakarta, Indonesia: 2%
- Da Nang, Vietnam: 2%
- Ho Chi Minh City, Vietnam: 6%
- Kuala Lumpur, Malaysia: 6%
- Osaka, Japan: 5%
What interests Chinese Travelers

- Angkor Wat, Cambodia
- Gardens by the Bay, Singapore
- Temple of the Reclining Buddha (Wat Pho), Thailand
- BTS Skytrain, Thailand
- The Grand Palace, Thailand
- Seoul Metro, South Korea
- Petronas Twin Towers, Malaysia
- Taipei 101, Taiwan
- National Palace Museum, Taiwan
- Myeongdong Shopping Street, South Korea
- War Remnants Museum, Vietnam
- Hoi An Ancient Town, Vietnam
- Fushimi Inari-taisha Shrine, Japan
- Old Quarter, Vietnam
- N Seoul Tower, South Korea
- Sacred Monkey Forest Sanctuary, Indonesia
- Dotonbori, Japan
Top Destinations Viewed by Chinese Travelers

Thailand 19%
Japan 14%
United States 10%
Indonesia 5%
Hong Kong 5%
South Korea 5%
Singapore 3%
Mariana Islands 3%
Vietnam 3%
Italy 3%
France 4%
Taiwan 4%
Malaysia 4%
United Kingdom 4%
New Zealand 2%
Philippines 2%
Maldives 2%
Spain 2%
Australia 2%
Germany 2%
Thailand 19%
Japan 14%
What interests Indian Travelers

- Gardens by the Bay, Singapore
- Universal Studios - Singapore
- Temple of the Reclining Buddha (Wat Pho), Thailand
- BTS Skytrain Thailand
- Singapore Flyer, Singapore
- Petronas Twin Towers, Malaysia
- Singapore Mass Rapid Transit (SMRT)
- Walking Street Pattaya, Thailand
- Victoria Peak (The Peak), Hong Kong
- Singapore Zoo, Singapore
- Night Safari, Singapore
- Jurong Bird Park, Singapore
- Hong Kong Disneyland, Hong Kong
- Safari World, Thailand
- MTR, Hong Kong
- Cloud Forest, Singapore
- Langkawi Cable Car, Malaysia
Top Destinations Searched by Indian Travelers

- United States: 17%
- Thailand: 14%
- United Arab Emirates: 9%
- Indonesia: 7%
- United Kingdom: 6%
- Singapore: 5%
- Malaysia: 4%
- Sri Lanka: 4%
- Spain: 4%
- Italy: 4%
- Maldives: 4%
- China: 3%
- Switzerland: 3%
- Greece: 2%
- Nepal: 2%
- Mauritius: 2%
- Germany: 2%
- Bhutan: 2%
- Nepal: 2%
- Thailand: 2%
- United States: 6%
- Indonesia: 5%
- United Kingdom: 4%
- Singapore: 3%
- Malaysia: 2%
- Sri Lanka: 2%
- Spain: 2%
- Italy: 2%
- Maldives: 2%
- China: 2%
- Switzerland: 2%
- Australia: 2%
- Nepal: 2%
- Mauritius: 2%
- Germany: 2%
Influence you can measure isn’t worth having

Influencers or Thought Leaders?
How do you measure Blogging success?
How are you working with Bloggers?
What expectations do you have?
How have your industry reacted?

http://www.gq-magazine.co.uk/article/influencer-marketing