Ready to restart: The current state of the travel industry

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Travel recovery trends
The gap between last year’s travel intent and today remains healthy, exceeding +85% year on year

Even with the decrease in traffic due to expected seasonality trends, the number of users clicking to book hotels remains significantly higher versus this time last year.

**Weekly number of Hotel Clickers trending 2020 - 2021**

Global IPs and Destinations

- **COVID vaccinations begin to accelerate**
- **Expected decline due to seasonality**
- **+85% growth in Hotels Clickers YoY**
- **COVID vaccinations roll out, seasonality and travel optimism kick in**
With the exception of Japan, all key markets were significantly more optimistic about travel this October versus last October 2020. However, hotel clickers in Japan are less optimistic with October ~ 30% less than last year’s numbers.
The vast majority of November and December travel plans are domestic but travel for next year looks a little different, with all signs pointing to international stays.

**Domestic**: 65% of all consumers clicking to book stays in December are domestic destinations.

**International**: 72% of all consumers clicking to book stays for Sept 2022 are planning to travel internationally.

Data based on Hotels Traffic.
Booking flexibility remains a priority

The share of users interacting with the ‘Free Cancellation’ filter on site has increased since last month (Oct vs Sept 2021), while filters like ‘Beach’ property types have decreased a bit month over month.
Restaurants shoppers in Spain continue to climb, as traffic jumps more than +50% since last October

While hotel clickers in the United States are up quite a bit year on year, restaurant shoppers in the US haven’t changed much.
Similar to restaurants traffic, attractions pageviews have increased across all major European countries.

Attractions traffic in the US is slightly down year on year, but has begun to plateau which is a great sign of recovery for the upcoming year.

<table>
<thead>
<tr>
<th>Country</th>
<th>YoY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain</td>
<td>+57.6%</td>
</tr>
<tr>
<td>Italy</td>
<td>+45.8%</td>
</tr>
<tr>
<td>Mexico</td>
<td>+37.1%</td>
</tr>
<tr>
<td>Germany</td>
<td>+26.5%</td>
</tr>
<tr>
<td>France</td>
<td>+21.9%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>+21.1%</td>
</tr>
<tr>
<td>Canada</td>
<td>+16.4%</td>
</tr>
<tr>
<td>United States</td>
<td>-2.9%</td>
</tr>
<tr>
<td>Brazil</td>
<td>-24.8%</td>
</tr>
<tr>
<td>Singapore</td>
<td>-32.7%</td>
</tr>
<tr>
<td>Thailand</td>
<td>-50.6%</td>
</tr>
</tbody>
</table>

**Monthly Attractions Pageviews by Market trending 2020 - 2021**

Last year (2020) vs This year (2021)

Data based on Attractions Traffic
2022 Consumer Travel Plans
The opening of international borders will likely have a significant impact in future travel plans, particularly in APAC & EMEA.

<table>
<thead>
<tr>
<th>Region</th>
<th>Impact Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global</td>
<td>65%</td>
</tr>
<tr>
<td>EMEA</td>
<td>65%</td>
</tr>
<tr>
<td>APAC</td>
<td>67%</td>
</tr>
<tr>
<td>USA</td>
<td>57%</td>
</tr>
</tbody>
</table>

Q: What impact would the opening of international borders have on your future travel plans, if any? [Large/Moderate impact]

Source: 2021 Consumer Sentiment; n=3,200; United States, United Kingdom, Italy, Australia, Germany, India, Japan, Singapore; 08/12/21-08/26/21
Once borders reopen, consumers in EMEA and APAC will prefer a return to international travel, while those in the US favor domestic travel.

Q: Once most international borders are open again, would you generally prefer international travel for your leisure trips of more than 3 days?

Source: 2021 Consumer Sentiment; n=3,200; United States, United Kingdom, Italy, Australia, Germany, India, Japan, Singapore; 08/12/21-08/26/21
Consumers intending to travel are most excited to explore new places, not return to the familiar

Q: Looking ahead to your 2022 travel plans, do you plan on visiting old destinations you have visited before, new destinations, or a mix of both?
[answers excludes undecided travelers]

- Mostly/all new destinations: 28%
- Mostly/all old destinations: 55%
- Equal mix of old and new destinations: 17%

Source: 2021 Consumer Sentiment; n=3,200; United States, United Kingdom, Italy, Australia, Germany, India, Japan, Singapore; 08/12/21-08/26/21
Nearly half of those who spent more did so in pursuit of luxury

I wanted to treat myself to a more luxurious trip

I took a longer trip this year

I did nothing different, things were just more expensive than pre-pandemic

I was desperate for a vacation/holiday, regardless of the cost

Top 4 reasons cited for higher 2021 spending

43%
I wanted to treat myself to a more luxurious trip

36%
I took a longer trip this year

35%
I did nothing different, things were just more expensive than pre-pandemic

34%
I was desperate for a vacation/holiday, regardless of the cost

Source: “You said you spent more on your biggest trip this year (between June - August 2021) than you did pre-pandemic (June - August 2019). Why is that?”; 2021 Consumer Sentiment Survey; n=2,386; United States, United Kingdom, Italy, Australia, Japan, Singapore; 09/3/21-09/14/21.
The Covid–19 pandemic caused a drastic decline in cash usage due to the risk of contamination.

Q: Compared to trips that you took before the Coronavirus (COVID–19) pandemic, how important are the following factors when making travel destination decisions?

Contactless payments are widely accepted

Of the consumers responded that is more important than it was before the coronavirus pandemic.

61%

Source: 2021 Consumer Sentiment; n=XXX; United States, United Kingdom, Italy, Australia, Germany, India, Japan, Singapore; XXX
Most travellers are eager to return to city/urban travel in 2022

Q: Looking ahead to your 2022 plans, which of the following best describes where you plan to visit?

- 40% Urban/City Destinations
- 23% Not Sure Yet
- 22% Both Urban & Rural Destinations
- 16% Rural Destinations

Source: 2021 Consumer Sentiment; n=3,200; United States, United Kingdom, Italy, Australia, Germany, India, Japan, Singapore; 08/12/21-08/26/21
How Tripadvisor is supporting the recovery of the industry
TRIPADVISOR SOLUTIONS

Tripadvisor Plus
Get member-only savings on hotels, experiences, and perks from Tripadvisor for $99/year.

Travel Safe
A program dedicated to putting travelers’ minds at ease while prioritizing their safety

Recovery Packages
A wide range of discounted products to help businesses stay afloat & recapture traveler demand

Review Guidelines Updated
During these unprecedented times, we are taking extra steps to ensure our platform is used responsibly

Introducing Tripadvisor Plus, a new way to up your travel
Get member-only savings on hotels, experiences, and perks from Tripadvisor for $99/year.

At Tripadvisor, we believe travel is a force for good — it lifts businesses, strengthens communities, and compels us to share our experiences with others. That’s why we’ve created Travel Safe: a new set of tools powered by real travelers, designed to give you peace of mind for when you’re ready to start planning again. Learn more about it, below.

We’re offering our hotel partners exclusive recovery packages worth over $500M in total savings to help recapture traveler demand.

We’re here to help
The COVID-19 pandemic is impacting the travel and hospitality sector in immediate and far-reaching ways. We know many business owners are trying to decide how best to navigate these unprecedented challenges, and we share your concerns.

Please read more about the resources we are introducing for everyone here.
2021 Tripadvisor Transparency Report

The 2021 Tripadvisor Review Transparency Report is an in-depth report which reveals all details about how Tripadvisor assesses and moderates reviews.

The 2021 Report includes statistical analysis of review submissions in 2020, including the volume of fake reviews targeted at the platform.

It also details a number of commitments Tripadvisor is making to protect the integrity of reviews on its platform.

2019

First Tripadvisor Review Transparency Report, focused on 2018 content submission

2021

Second Tripadvisor Review Transparency Report, focused on 2020 content submission
26m+
Reviews submitted to the site

4.30
Out of 5 is the average rating submitted by user

2m+
Review submissions were rejected or removed by Tripadvisor

Source: 2021 Review Transparency Report, click here to read the full report
By the numbers

54.1% were for locations in Europe; 23.5% for those in North America

26M+ reviews submitted globally

82.1% had ratings of 4 or 5 bubbles; just 7.2% had a 1-bubble rating

Source: 2021 Review Transparency Report, click here to read the full report
In 2020, Tripadvisor received **59 million reviews and opinions** from its members around the world. This includes a number of different forms of **user-generated content** (UGC), such as reviews, management responses, and forum posts.

Of these, more than **26 million were reviews**.
How Covid-19 Changed Review Moderation at Tripadvisor

We remove:

1. Any content that encourages people to ignore government guidelines or promotes misinformation
2. Any review criticizing an individual business for closing in response to COVID-19 lockdown measures
3. Racially insensitive content on the COVID-19 virus

Source: 2021 Review Transparency Report, click here to read the full report
As a result of these changes, our team manually moderated an additional 257,022 reviews.

Source: 2021 Review Transparency Report, click here to read the full report.
Review rating

The average review rating in 2020 was **4.30** out of 5.0, up from **4.22** out of 5.0 in 2018.

Even with all of the challenges the hospitality industry faces today, the majority of travelers submitting reviews on Tripadvisor do so to share their **positive** experiences and reward businesses that make their experience special.

Source: 2021 Review Transparency Report, click [here](#) to read the full report
Tripadvisor

By the numbers

That includes over 1.3MM review submissions that were rejected before ever being posted

8.6% of all review submissions were rejected or removed

3.5% of review submissions were removed as a result of after-posting moderation

Source: 2021 Review Transparency Report, click here to read the full report
How the content moderation process works

Reviews submitted must comply with our community standards:

Example of a Review

"I enjoyed a fantastic meal here last week. The food is delicious. The chef clearly puts an emphasis on fresh, local ingredients and as a vegan, I had plenty of options to choose from. The servers were very friendly and welcoming and although the service was a little slow at times, that was understandable given how busy it was. Loved the ambience and décor too (the restaurant is recently redecorated). I will definitely return!"

Date of visit: Oct 2021
Helpful? ✅

Source: 2021 Review Transparency Report, click here to read the full report
What happens when a review is submitted

Our layered approach to moderation

01STEP

Tripadvisor member submits a review

02STEP

Review is assessed by our review system

Source: 2021 Review Transparency Report, click here to read the full report
Analysis determines that review does not comply with posting guidelines.

Analysis does not identify any issues.

Analysis identifies something potentially suspicious.

Analysis determines that review does not comply with posting guidelines.

Review requires further investigation.

Human moderator determines whether review meets guidelines.

Review Posted or Review Rejected.

Source: 2021 Review Transparency Report, click here to read the full report.