Six New Needs-based Traveller Typologies

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Global Director of Industry Relations
MISSION
HELP TRAVELERS
PLAN AND BOOK
THE BEST TRIP
Understanding the motivation to share

The drive to share positive experiences far outweighs that of negative or average experiences

<table>
<thead>
<tr>
<th>Service</th>
<th>😊 (%)</th>
<th>😐 (%)</th>
<th>😞 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restaurants</td>
<td>93</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Local attractions and destination activities</td>
<td>91</td>
<td>5</td>
<td>4</td>
</tr>
<tr>
<td>Hotels</td>
<td>84</td>
<td>7</td>
<td>9</td>
</tr>
<tr>
<td>Airlines</td>
<td>84</td>
<td>9</td>
<td>7</td>
</tr>
<tr>
<td>Home or apartment rentals</td>
<td>80</td>
<td>16</td>
<td>4</td>
</tr>
<tr>
<td>Car Rental Companies</td>
<td>72</td>
<td>15</td>
<td>13</td>
</tr>
</tbody>
</table>

Source: Phocuswright’s U.S. traveller Technology Survey 2015
Review Sites and Social Media are the Most Influencial Channels on Travel Decisions

- Online travel reviews found on websites like TripAdvisor: 59%
- Vacation pictures and videos friends posted on social networks: 54%
- Videos on YouTube: 31%
- Ads or posts by travel companies on social networks: 16%
- Travel blogs: 11%

Source: Phocuswright’s U.S. traveller Technology Survey 2015
China in TripAdvisor reviews (out of five)

Excellent average review rating Jan 2014 – Sept 2016

Accommodations 4.1

Restaurants 4.1

Attractions 4.3
NEEDS-BASED TRAVELLER TYPOLOGIES
Study background

33 countries
36,444 participants
21/6 – 8/7 2016

Age Groups

18-34
- 45% male
- 55% female

35-54
- 56% male
- 44% female

55+
- 69% male
- 31% female

Base: All respondents (36,444); Age groups: 18-34 (7,173), 35-54 (16,540), 55+ (12,731)
Introducing the traveler 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

Base: All respondents (36,444)
Introducing the traveller typologies

Independent Travellers 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 Travellers 7%
“Help minimise time researching with peace of mind”
Age: 35-64
Household Income: Low
Traveling with: Solo

Base: All respondents (36,444)
Value Seekers particularly value TripAdvisor to help them find deals.

CQ14. Which of the following would you agree... “TripAdvisor”? CQ12. Which of the following sources of information, if any, did you use to plan your most recent trip? Base: All Respondents (36,444), Value Seekers (4,465)

**Where do Value Seekers differ?**

**Babysitting service**
One in five (22%) of Value Seekers choose accommodation that provides babysitting services – just one in ten (10%) average travelers say the same.

**Kids Club**
25% of Value Seekers select their accommodation because there is entertainment for kids (compared to 13% average).

**Importance to final decision to book accommodation**
- Accommodation price: 97%
- Ratings on review site: 90%
- Amenities: 89%

**Top holiday types**
- Beach holiday: 55%
- City break: 51%
- Exploring city culture: 49%

I’m likely to rent with peer to peer sites in the future (45%)

(28%)
Deciding on accommodation
More than six in ten (62%) look at their accommodation options on TripAdvisor.

The perfect trip is spending it on a warm sunny beach

Top holiday types
- Beach holiday: 62%
- City break: 55%
- Exploring city culture: 53%

More likely to...
- Spa: 26%
- Cruise: 24%
- Ski/Snowboard: 20%

CQ14. Which of the following would you agree..."TripAdvisor"? CQ12. Which of the following sources of information, if any, did you use to plan your most recent trip? Base: All Respondents (36,444), Luxury Travelers (6,421)
Social Travelers

Social Travelers look to find hidden treasures through TripAdvisor and are more likely to require child care services when on a trip.

Sources of Information

Word of Mouth
An important source of information across all stages of planning. 43% choose destination based on word of mouth, compared to 38% overall.

Content posted by family and friends
Content posted online is more influential than for other groups. Three in ten (30%) use content posted by family and friends to research entertainment/attractions.

Heavy Social Media Sharers

- Review 42%
- Pictures 65%
- Check-in 39%
- Pictures 38%
- Videos 20%

Where do Social Travelers differ?

Babysitting service
One in five (21%) of Social Travelers choose accommodation that provides babysitting services – just one in ten (10%) average travelers say the same.

Kids Club
25% of Social Travelers select their accommodation because there is entertainment for kids (compared to 13% average).

Concerns about terrorism affect my destination choice
77% (66%)

Prepared to pay extra for luxury
63% (52%)

CQ14. Which of the following would you agree...“TripAdvisor”? CQ12. Which of the following sources of information, if any, did you use to plan your most recent trip? Base: All Respondents (36,444), Social Travelers (4,756)
Use the following channels when gathering inspiration and booking accommodation:

**Research:**
- Device & Channel
  - 76% (69%) Travel Guide on laptop

**Accommodation Booking:**
- Device & Channel
  - 24% (19%) Directly on Google on smartphone

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**Where do Independent Travelers differ?**

58% (53%)
Care more about history and culture than the weather

**Independent Travelers use social media like others, but more of them share a TripAdvisor review**

- Review: 50% (44%)
- Pictures: 43% (43%)
- Photos: 25% (22%)

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CQ14. Which of the following would you agree...“TripAdvisor”? CQ12. Which of the following sources of information, if any, did you use to plan your most recent trip? Base: All Respondents (36,444), Independent Travelers (10,437)
Researchers are the most engaged TripAdvisor users, for planning and sharing.

Top Holiday Types:
- Beach Holiday: 63% (57%)
- Friends/Family: 62% (56%)
- Exploring City Culture: 54% (52%)

Heavy Social Media Sharers:
- Review: 52% (44%)
- Pictures: 49% (43%)
- Check-in: 34% (29%)
- Review: 26% (22%)

Importance to final decision to book accommodation:
- Price: 95% (93%)
- Ratings on Review Site: 91% (86%)
- Proximity to Attractions: 86% (80%)

Gender:
- Women: 53% (47%)
- Men: 47% (53%)

Travel Needs:
- 71% (66%) Concerns about terrorism affect my destination choice
- 59% (52%) Prepared to pay extra for luxury

Use the following channels when gathering inspiration and booking accommodation:
- Research: Device & Channel: 60% (53%)
  - Content by friends & family on laptop
- Accommodation Booking: Device & Channel: 80% (71%)
  - Directly on Google on laptop

CQ9. What were the main reasons for choosing where you went on your last trip? CQ12. Which of the following sources of information, if any, did you use to plan your most recent trip? CQ19. Staying with your most recent trip, how important were each of the following in your final decision to book your accommodation? CQ26. Did you share any information about your most recent trip in any of the following ways? Base: All Respondents (36,444), Researchers (13,133)
Habitual Travelers

Habitual Travelers are less likely to enjoy finding the best possible option when planning, but use TripAdvisor when researching accommodation.

Top Reason for Choosing a Destination

- 27% Experience the Culture

Researching accommodation

- 45% TripAdvisor
- 45% Online Travel Agent

Top holiday types

- Beach holiday: 52% (90)
- City break: 51% (97)
- Friends/Family: 47% (89)

Travel needs

- Enjoy trying to find the best possible option when planning my trip: 67% (76%)
- Prepared to pay extra for luxury: 52% (61)

Gender

- Female: 37% (78)
- Male: 63% (118)
Traveler types display different reasons for selecting destinations

Value Seekers and Social Travelers are quite price and family conscious, while Independent Travelers and Researchers seek cultural experiences.

<table>
<thead>
<tr>
<th>Reason</th>
<th>Overall</th>
<th>Value Seekers</th>
<th>Luxury Travelers</th>
<th>Social Travelers</th>
<th>Independent Travelers</th>
<th>Researchers</th>
<th>Habitant Travelers</th>
</tr>
</thead>
<tbody>
<tr>
<td>To experience the culture</td>
<td>31%</td>
<td>102</td>
<td>96</td>
<td>99</td>
<td>112</td>
<td>115</td>
<td>86</td>
</tr>
<tr>
<td>The accommodation had a good price</td>
<td>22%</td>
<td>131</td>
<td>99</td>
<td>122</td>
<td>90</td>
<td>113</td>
<td>94</td>
</tr>
<tr>
<td>The flight had a good price</td>
<td>16%</td>
<td>162</td>
<td>93</td>
<td>112</td>
<td>112</td>
<td>112</td>
<td>74</td>
</tr>
<tr>
<td>It was family-friendly</td>
<td>15%</td>
<td>139</td>
<td>99</td>
<td>146</td>
<td>66</td>
<td>106</td>
<td>92</td>
</tr>
<tr>
<td>It was great for my age group</td>
<td>12%</td>
<td>107</td>
<td>124</td>
<td>132</td>
<td>91</td>
<td>116</td>
<td>82</td>
</tr>
<tr>
<td>It was a good price for a luxury destination</td>
<td>10%</td>
<td>139</td>
<td>159</td>
<td>149</td>
<td>79</td>
<td>119</td>
<td>79</td>
</tr>
<tr>
<td>Money goes further there</td>
<td>9%</td>
<td>177</td>
<td>99</td>
<td>99</td>
<td>121</td>
<td>110</td>
<td>88</td>
</tr>
<tr>
<td>It was off the beaten track</td>
<td>8%</td>
<td>99</td>
<td>87</td>
<td>87</td>
<td>137</td>
<td>112</td>
<td>112</td>
</tr>
</tbody>
</table>

CQ9. What were the main reasons for choosing where you went on your last trip? Base: All respondents (36,444, Value Seekers (4,465), Luxury Travelers (6,421), Social Travelers (4,756), Independent Travelers (10,437), Researchers (13,133).
Younger, low-income groups use trains more often than older, wealthier groups

Older travelers more likely to share reviews on TripAdvisor

Recommendations are more important amongst younger travellers, whilst older generations are more habitual

Younger generations use more social channels to select their destination

Over half of female travelers share on Facebook

Beach holidays more popular with women and high-income