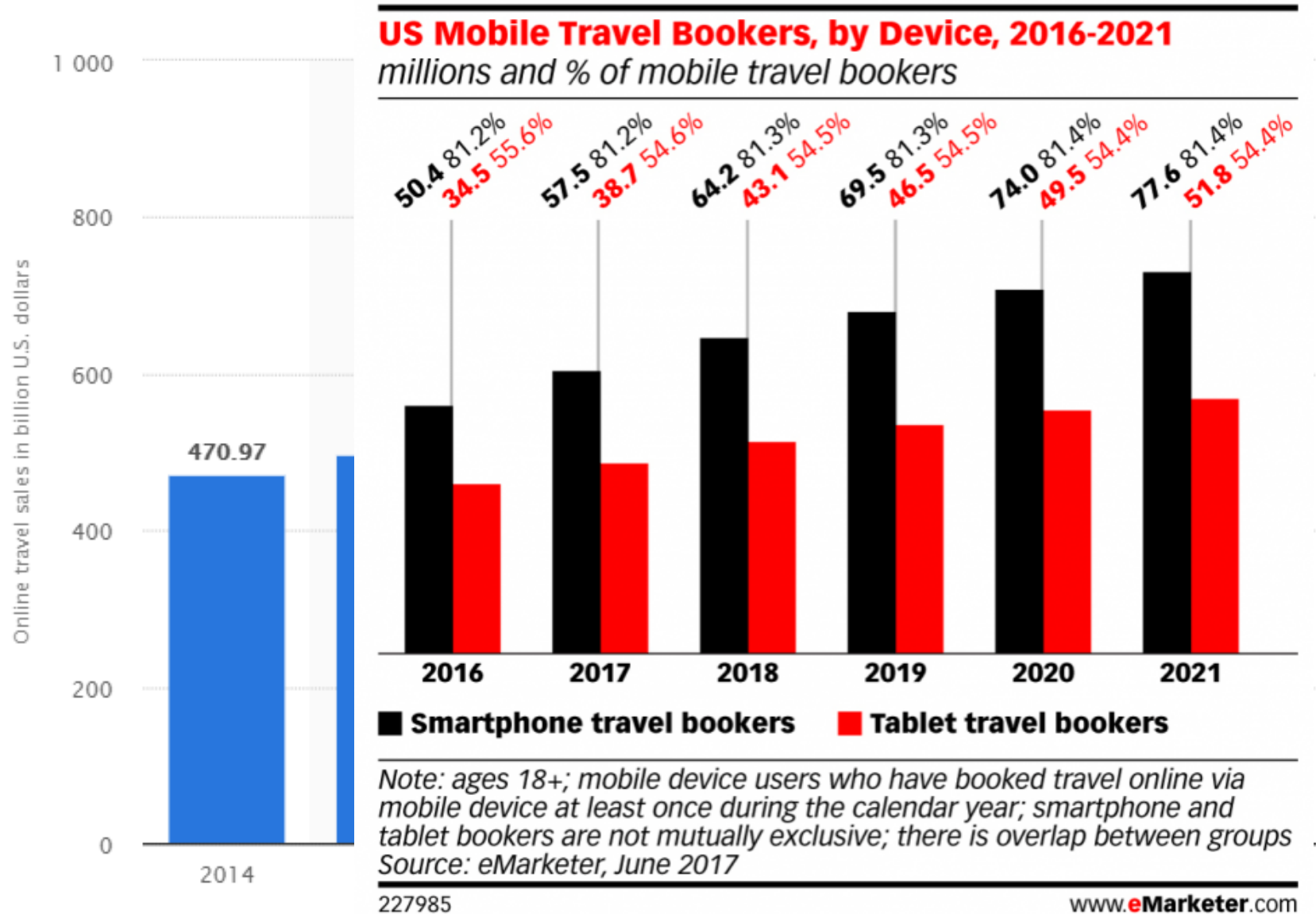




TripAdvisor

2018

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

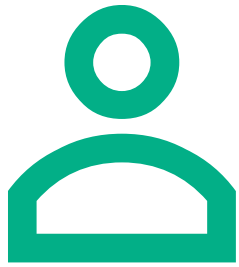
TripAdvisor **reached 60% of all worldwide users** examined who started their decision process and **subsequently booked travel online in Q2 & Q3 2017**



Engagement

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

TripAdvisor – World's Largest Travel Site



455M

average unique
monthly visitors **



49

Markets
Worldwide



570M

Reviews and
Opinions



7.3M

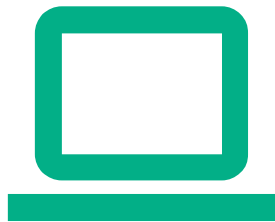
Accommodations,
Restaurants and Attractions

*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*



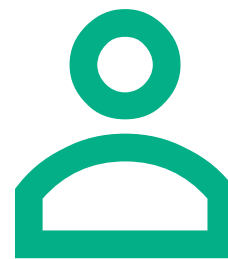
270+

New contributions per minute



147,000

Destinations



137M

Marketable Members



780,000

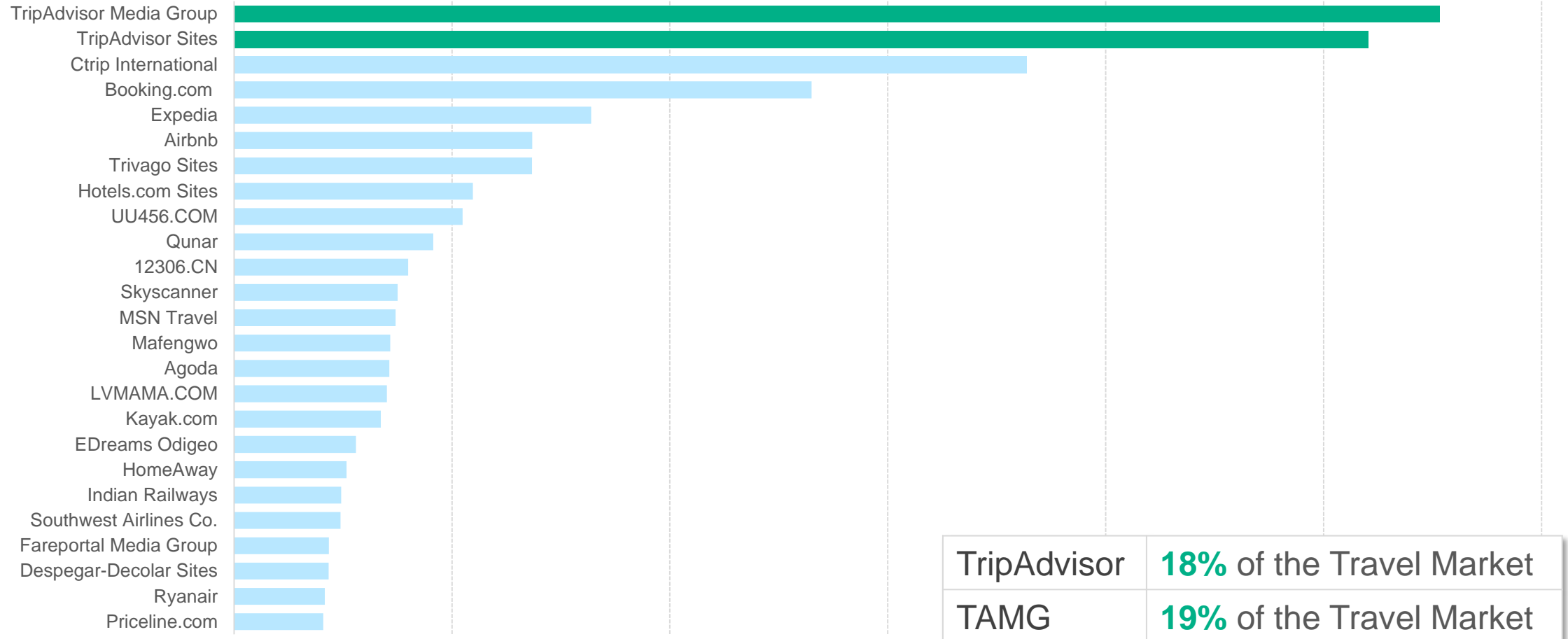
Vacation Rentals

*Source: TripAdvisor log files, average monthly unique visitors, Q3 2017

**Source: comScore Media Metrix for TripAdvisor Sites, worldwide, July 2017

TripAdvisor: Worldwide

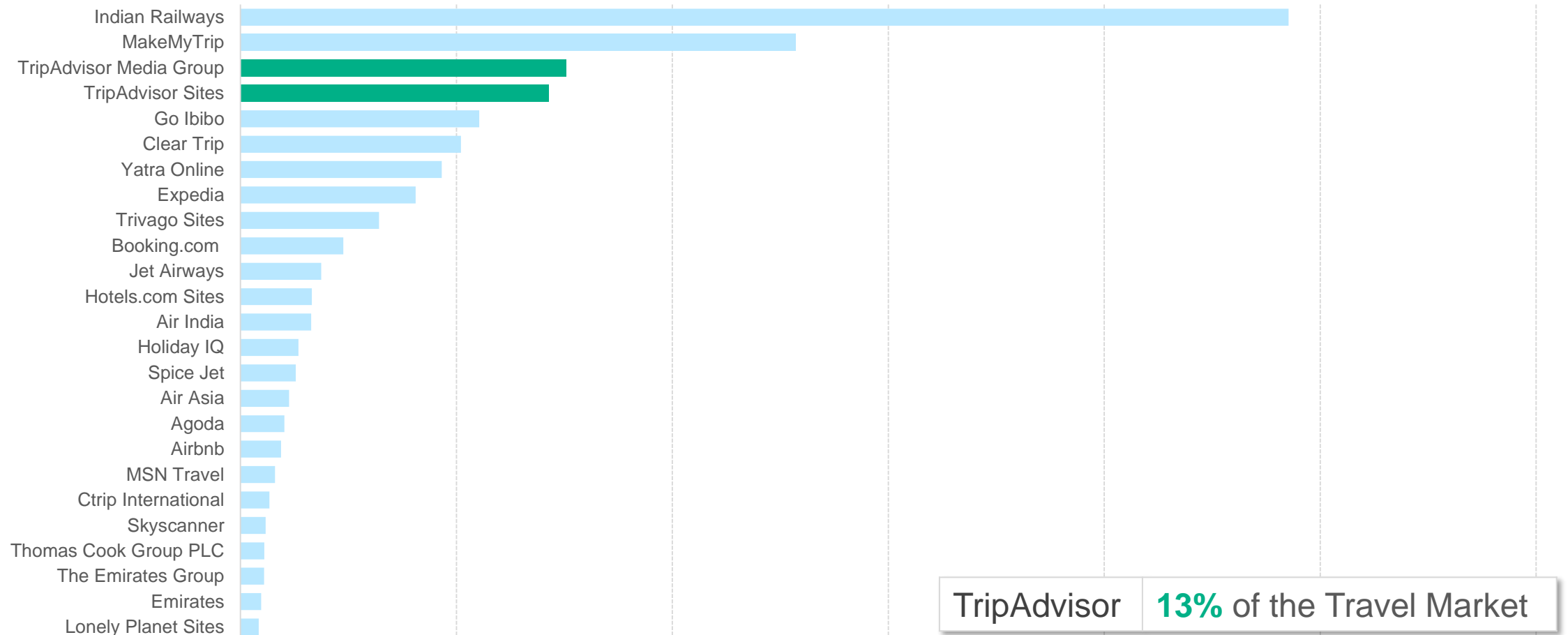
TripAdvisor is the world's largest travel site



TripAdvisor: India

Excluding Mobile Data

TripAdvisor is 3rd largest travel site in India



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 education the travel industry on how to use TripAdvisor

ANALYTICS

Providing in-depth analysis on current trends relevant to the destination

NEWS

[Home](#) | [Video](#) | [World](#) | [US & Canada](#) | [UK](#) | [Business](#) | [Tech](#) | [Science](#) | [Magazine](#) | [Entertainment & Arts](#) | [Health](#) | [More -](#)[Scotland](#) | [Edinburgh, Fife & East](#) | [Glasgow & West](#) | [Highlands & Islands](#) | [NE, Orkney & Shetland](#) | [South](#) | [More -](#)

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ICELANDAIR

TripAdvisor and VisitScotland deal 'could bring £150m tourism boost'

8 April 2017 | Scotland

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GETTY IMAGES

Edinburgh Castle is among Scotland's most popular attractions

Top Stories

US strike 'took out 20% of Syria planes'

The US warns Syria not to use chemical weapons again, as G7 holds key talks in Italy.

2 hours ago

Alabama 'Luv Guv' quits over relationship

1 hour ago

Man forcibly dragged off US flight

3 hours ago

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See lowest prices
from 200+ sites

tripadvisor

NEMU HOTEL &
RESORT HOTEL NEMU

Shima

~~\$208~~ -28%
From **\$153**



TripAdvisor

15 hrs ·

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>



80 12 comments 5 shares



About Thailand World Holiday Rentals Restaurants Things to do Flights

View Thailand



NEW TO THAILAND AND NOT SURE IF YOUR TASTE BUDS CAN HANDLE THE SPICE?

In partnership with the Tourism Authority of Thailand, here's TripAdvisor's guide to some of Thailand's most iconic and can't-miss foods, all on a handy spice-meter.







TELLING STORIES NOW



DON'T GET LEFT OUT IN THE COLD!



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





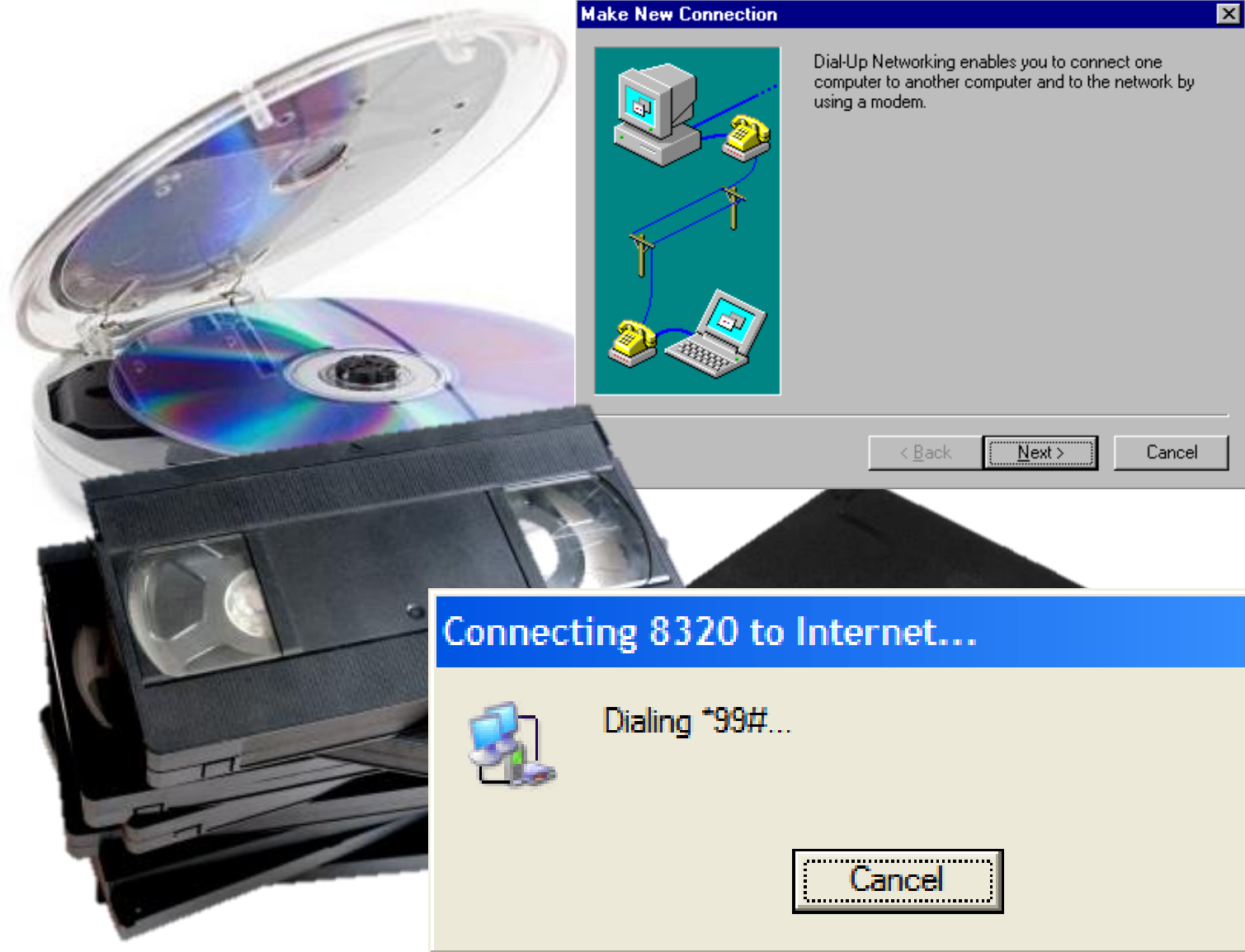
Please remember to rewind!

WARNING! If this label is broken, you must purchase this video.



©1997 Blockbuster Entertainment Inc.

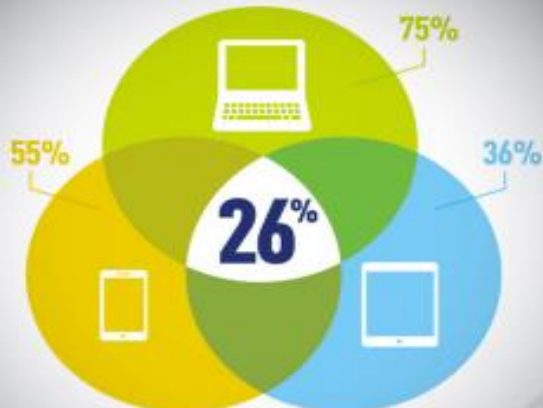
Let's rewind to 1999



Digital Omnivores on the Move



Propelled by the explosion of tablet and smartphone ownership, the ranks of digital omnivores — those who own a laptop, smartphone, and tablet — have swelled by 160 percent. Today, 26 percent of U.S. consumers are digital omnivores. At the same time, the growing popularity of digital devices is changing media consumption habits. Here's a closer look at what we found.



26% of U.S. consumers are digital omnivores



DIGITAL DISTRACTION

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



Nearly
50%
are purchasing
more e-books than
they consume

HOME UN-BOUND



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



RISE OF ALTERNATIVE PLATFORMS

Only 46% of Leading Millennials — often establishing new households — are buying pay TV. Even fewer (only 30%) are buying landline service.



TABLETS: TOO LEGIT TO QUIT

Over the past year, tablet ownership jumped by
177%



NEED FOR SPEED

More than half are willing to pay for a faster internet connection.



#SOCIALTRENDING

Boomers and matures are the new kids 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.



U.S. consumers identify desktop computers, laptops, smartphones, flat panel TVs (3D/non-3D), and tablets as the top five most valued products.



RENTING IS THE NEW OWNING

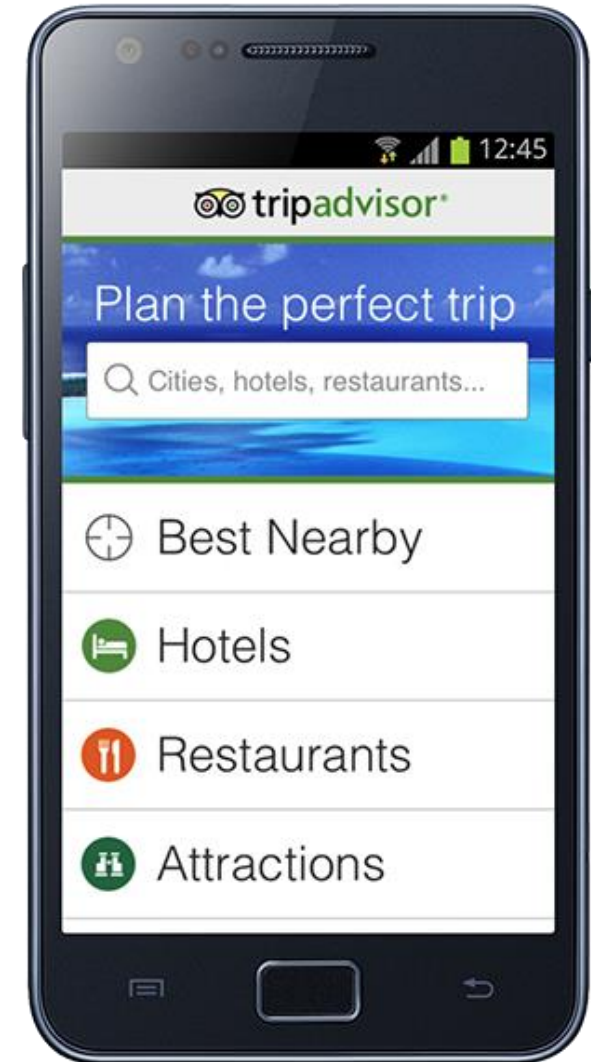
Over the next 12 months, more than twice as many consumers plan to rent rather than own video entertainment.

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

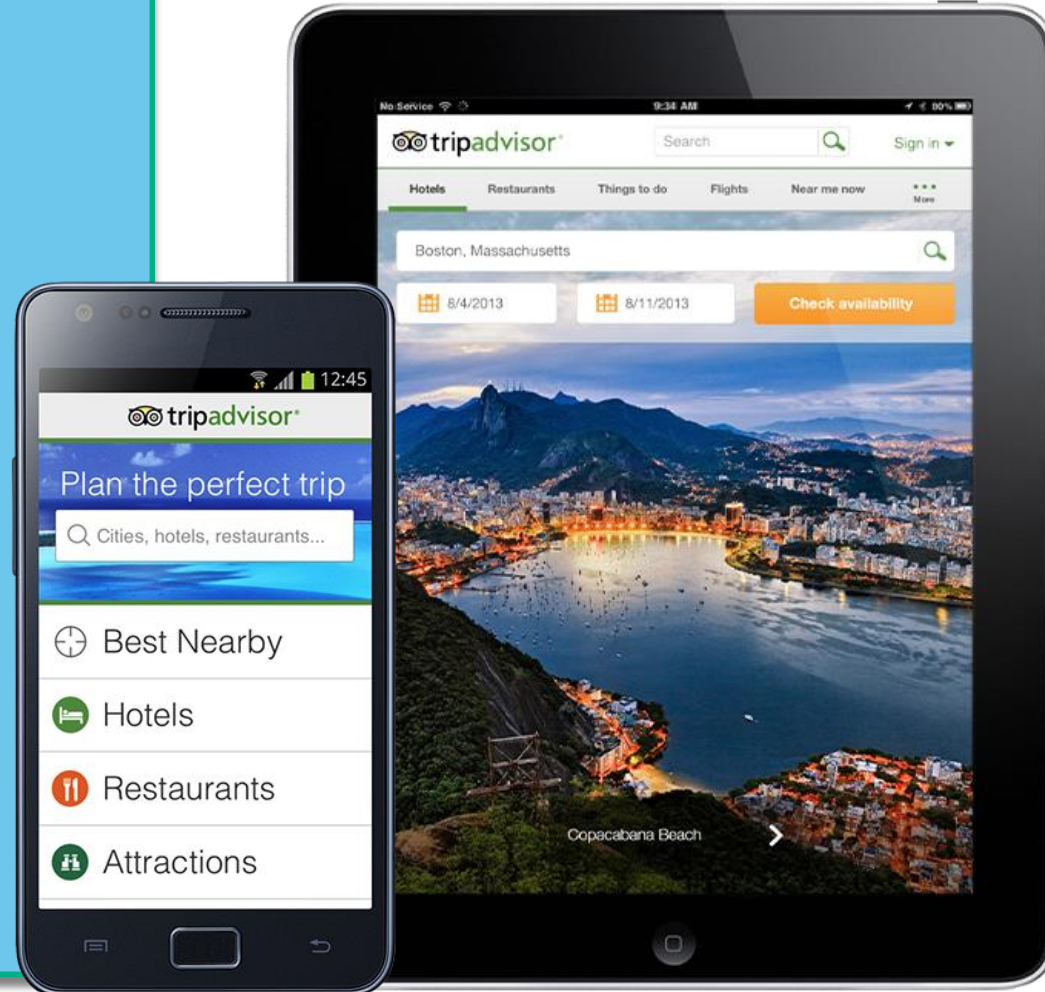
- Smartphones and tablets are here to stay.
- M-commerce is leading the way
- Think social–local–mobile.
- “digital omnivore” – users move seamlessly between phone, tablet, computer and television and use the devices in a complementary way.



Emerging Markets 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%





DESTINATION MARKETING OR MANAGEMENT

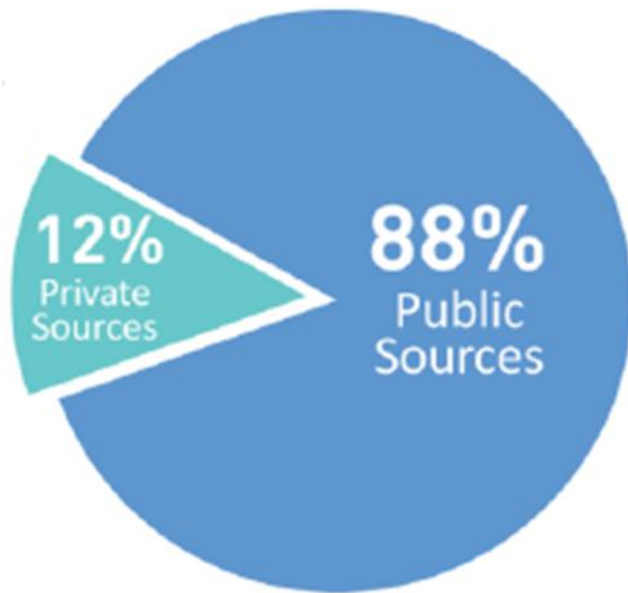


One Size Doesn't Fit All



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?





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

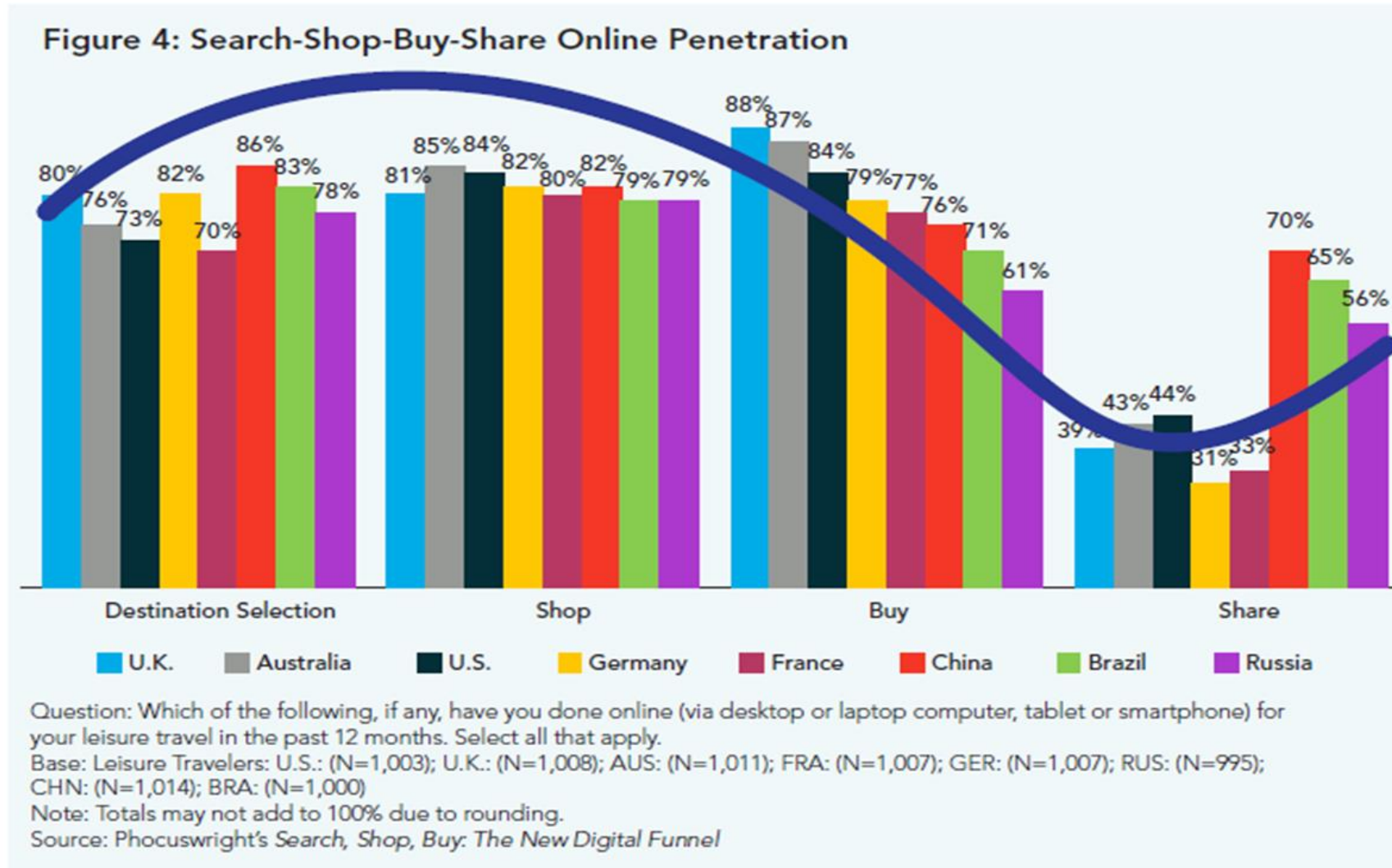


KNOWING THE SPACE YOU ARE PLAYING IN








Search-Shop-Buy-Share

Online penetration



From Dreaming to Sharing

Stage	Customer Needs
 Dream	Destinations that fit his/her lifestyle, travel history, family circumstance, budget, social needs
 Search	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
 Shop	Tools that aggregate contextualized content, provide accurate price comparisons and minimize the hours it takes today to shop for travel
 Buy	Accept multiple forms of currency, change/cancellation/refund rules, travel insurance, medical emergency repatriation and in destination activity bookings
 Experience	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.
 Share	Dialogs and postings on social media

Travelers Journey

Information

Impact

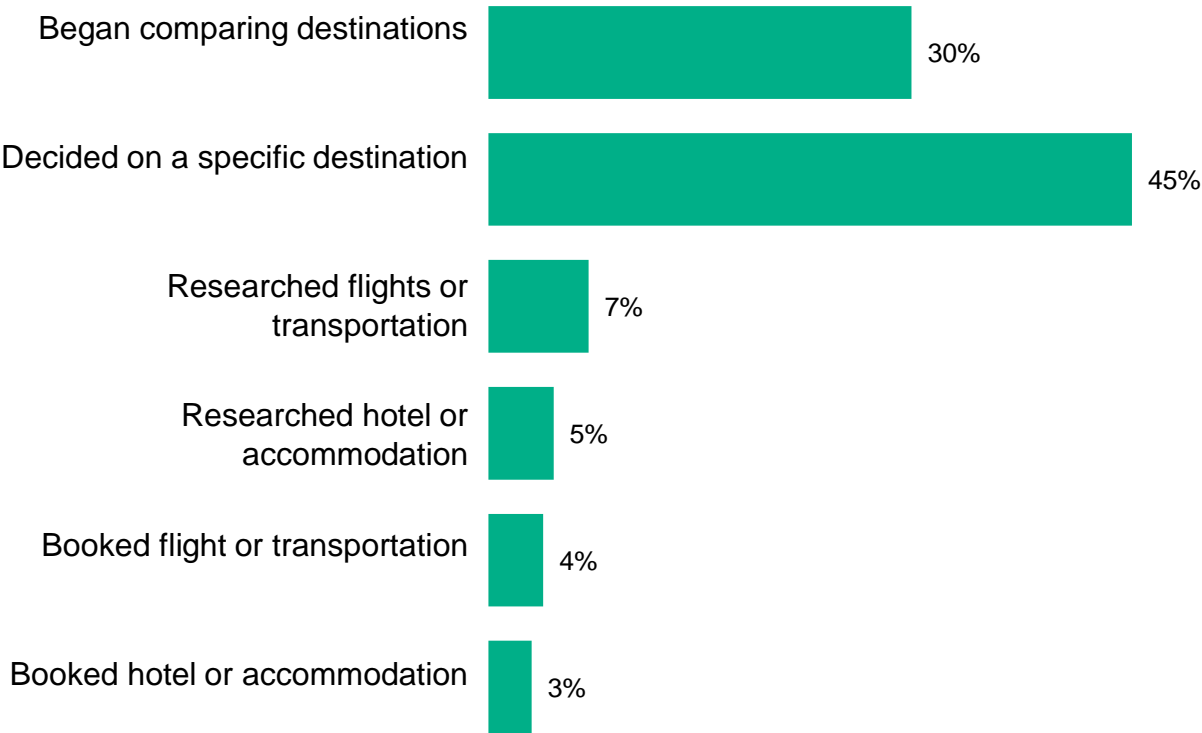
Attainment

Most Trips are Destination-led

How did you start planning this trip?

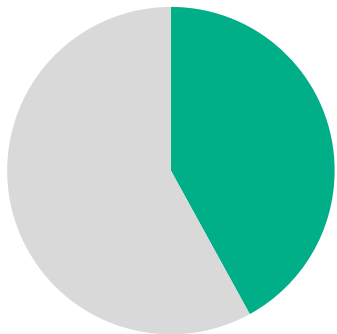


74% of travelers begin by researching and choosing their destination



Of those who didn't start with a destination

42% Start by booking flights



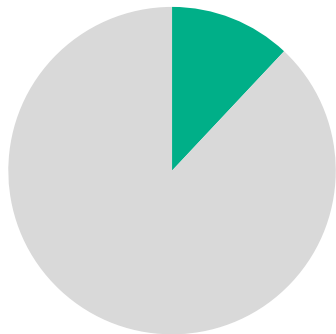
42%

Start by looking at
or booking flights



30%

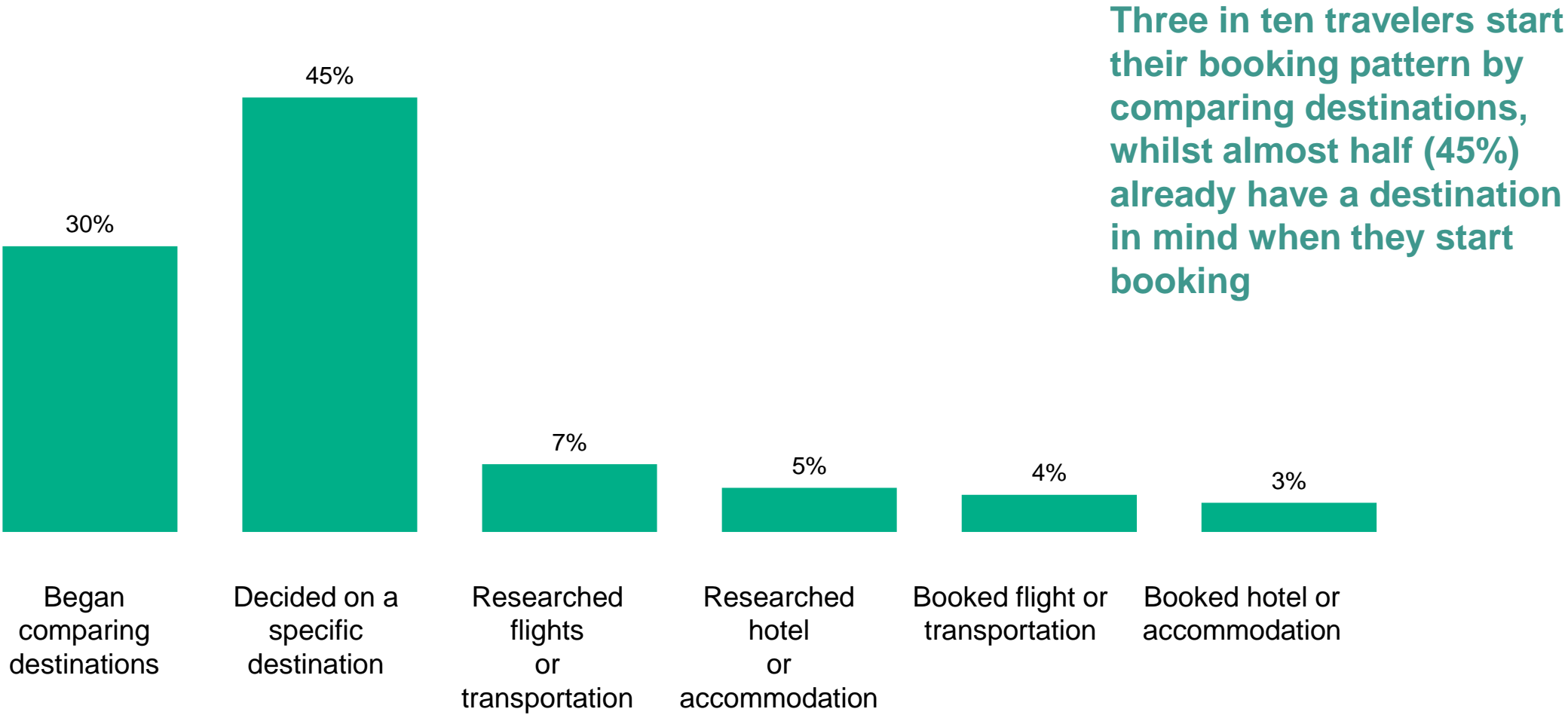
Start by looking at or
booking accommodation



12%

Just travelled to
their destination

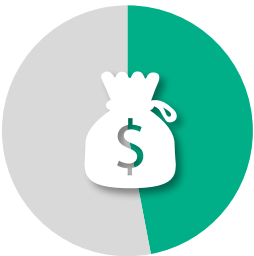
Destination is a popular starting point, but a sizeable number of travelers start their path to purchase journey elsewhere



Culture, cost and climate are key draws when choosing a destination



31% of travelers select a destination for its culture

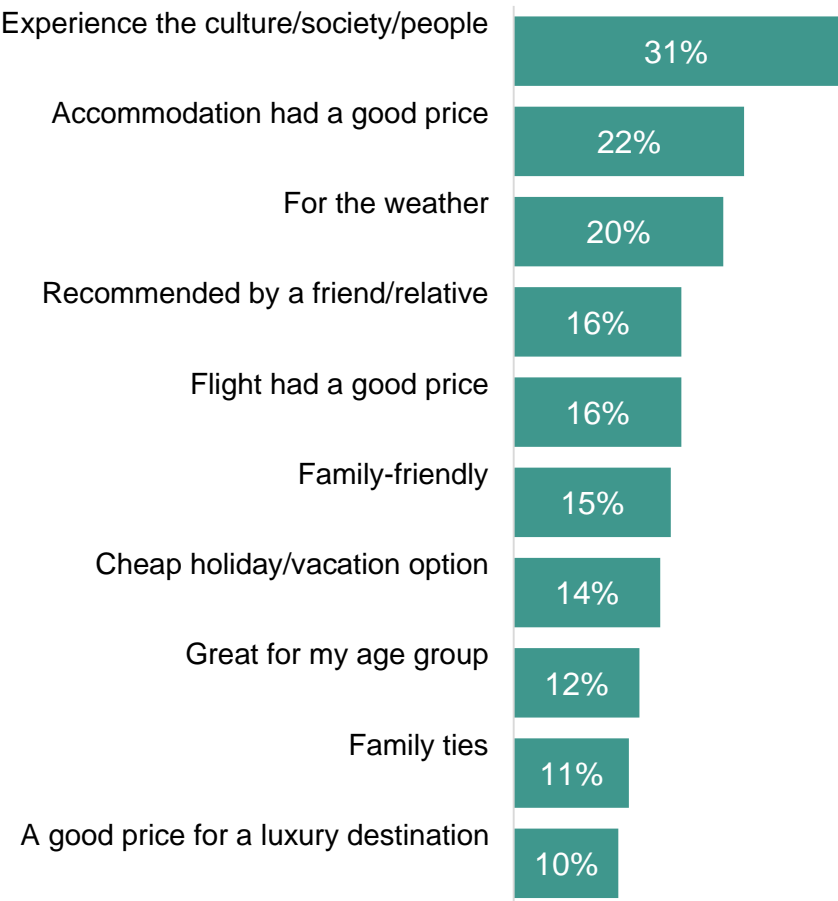


Almost half (47%) of travelers choose a destination because of price



One in five travelers state that weather was an important factor in choosing their destination

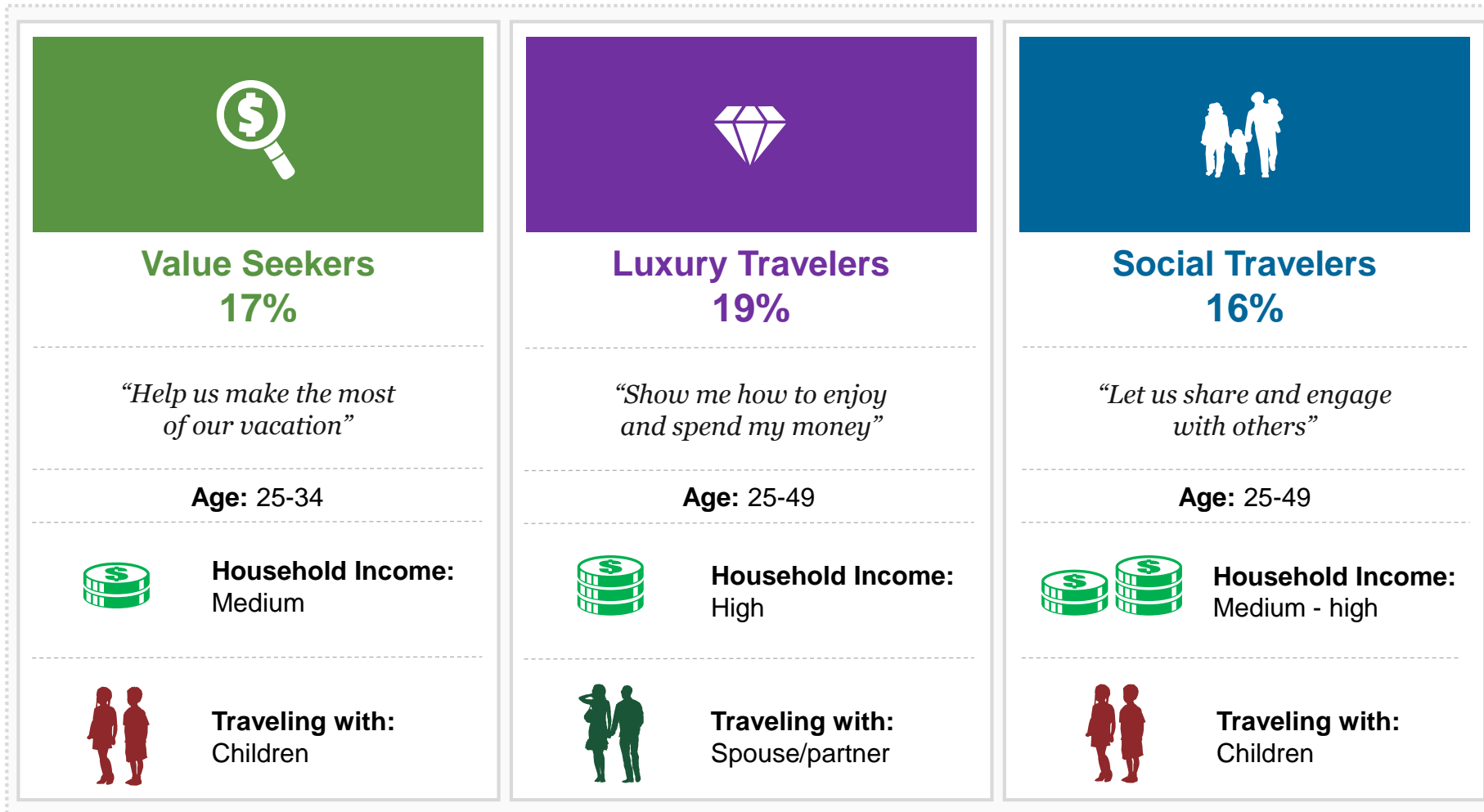
Top ten reasons for choosing a destination





WHO ARE WE?

Traveller typologies



Traveller typologies



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

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**



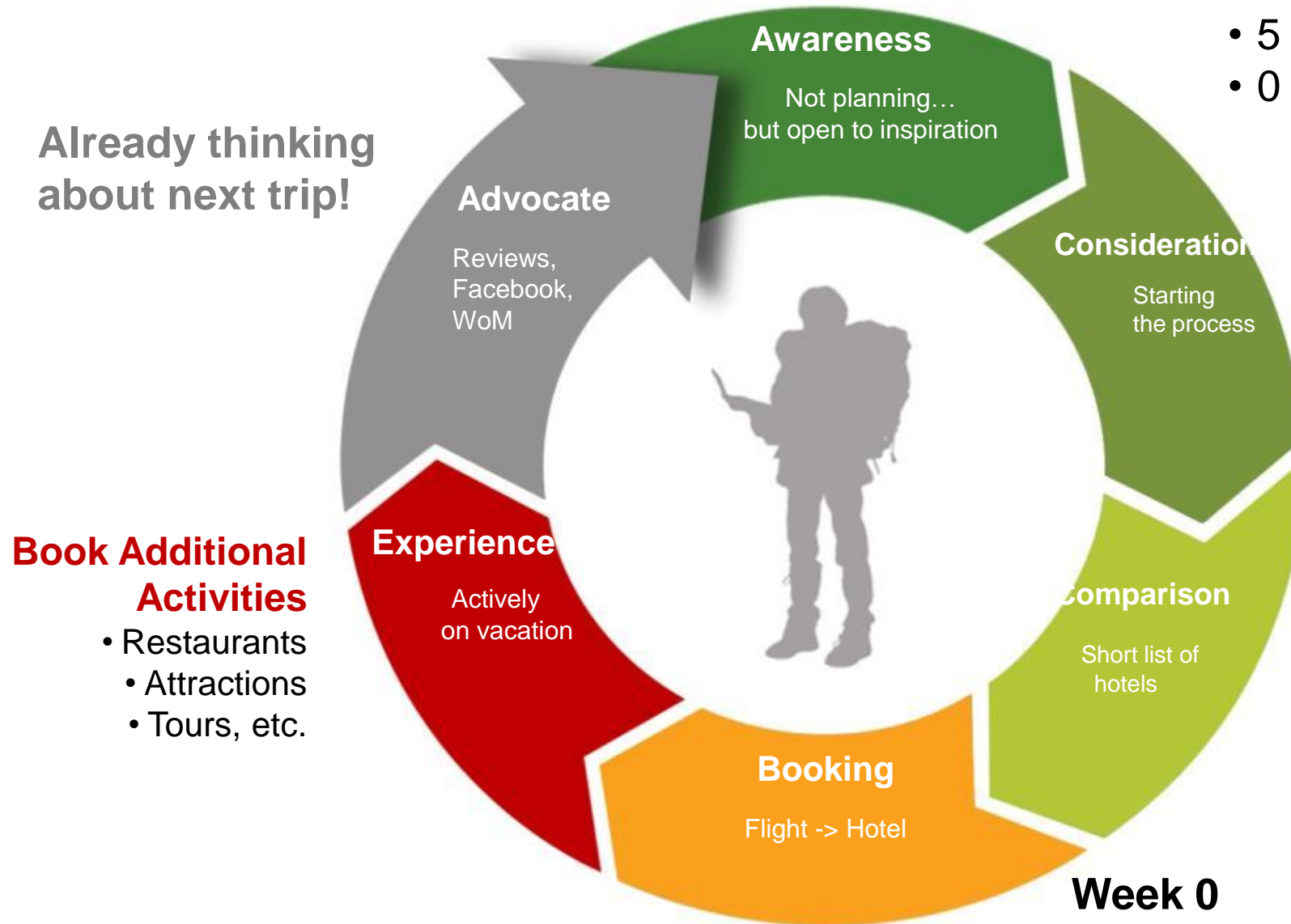
Week -20+
“Not Yet Ready”

Week -16:
• 5 Destinations
• 0 Hotels

Week -12:
• 3 Destinations
• 6 Hotels

Week -4:
• 1 Destination
• 15 Hotels

Week 0
• Booked

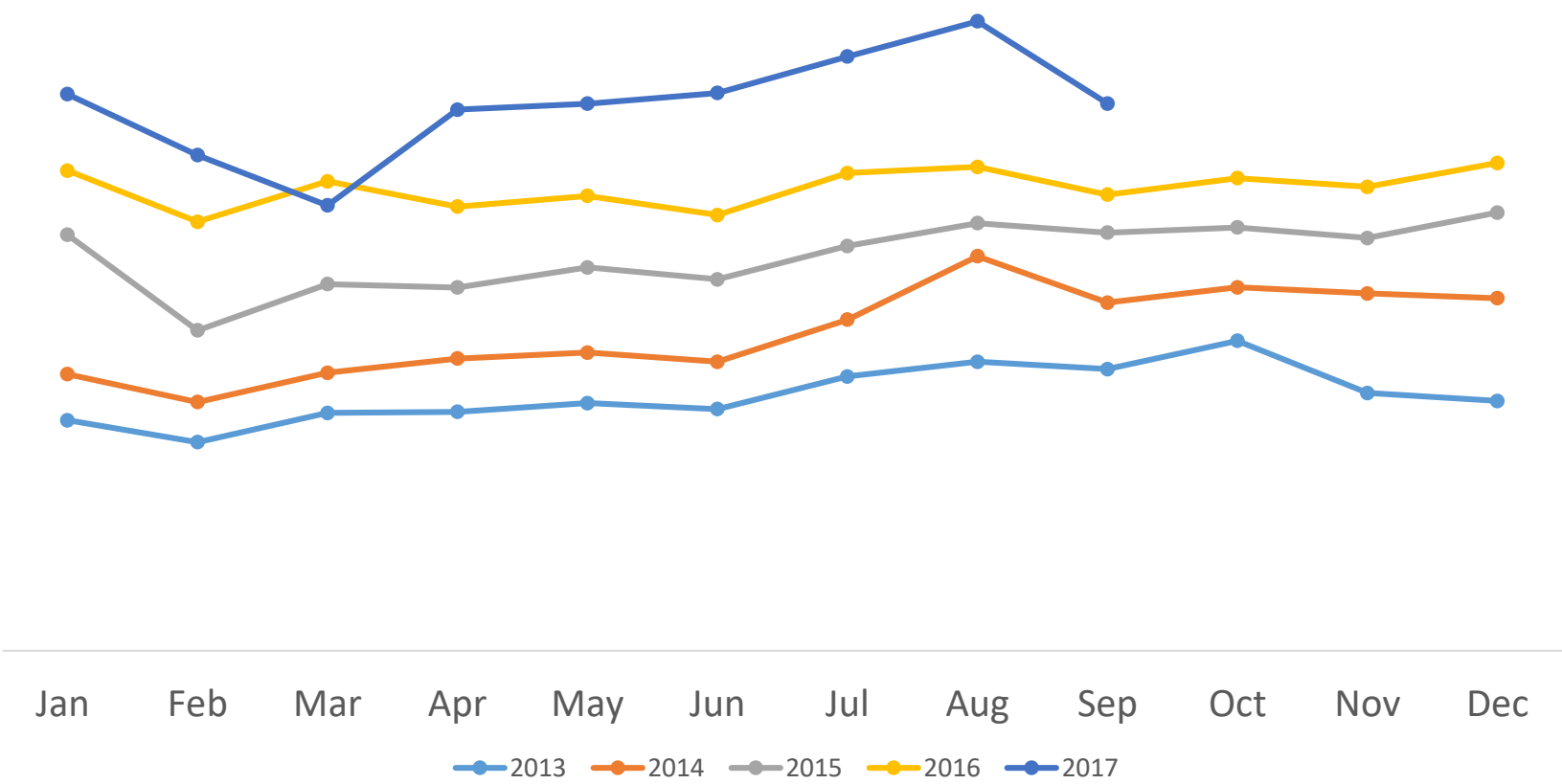


Book Additional Activities
• Restaurants
• Attractions
• Tours, etc.



Asia Pacific

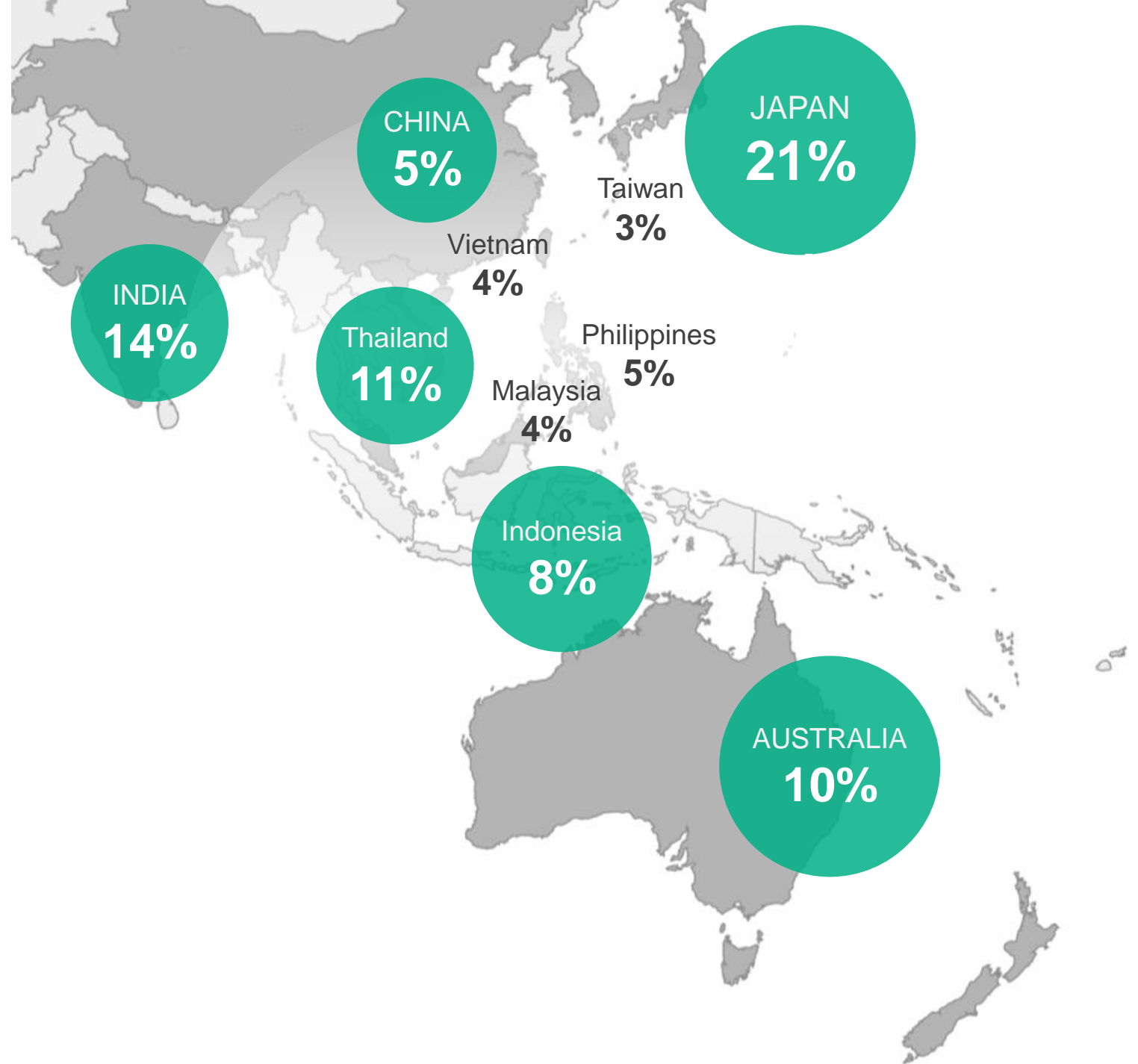
Looking at 2016 August and 2017 same period there has been a 30% increase in travellers consuming Asia Pacific Content



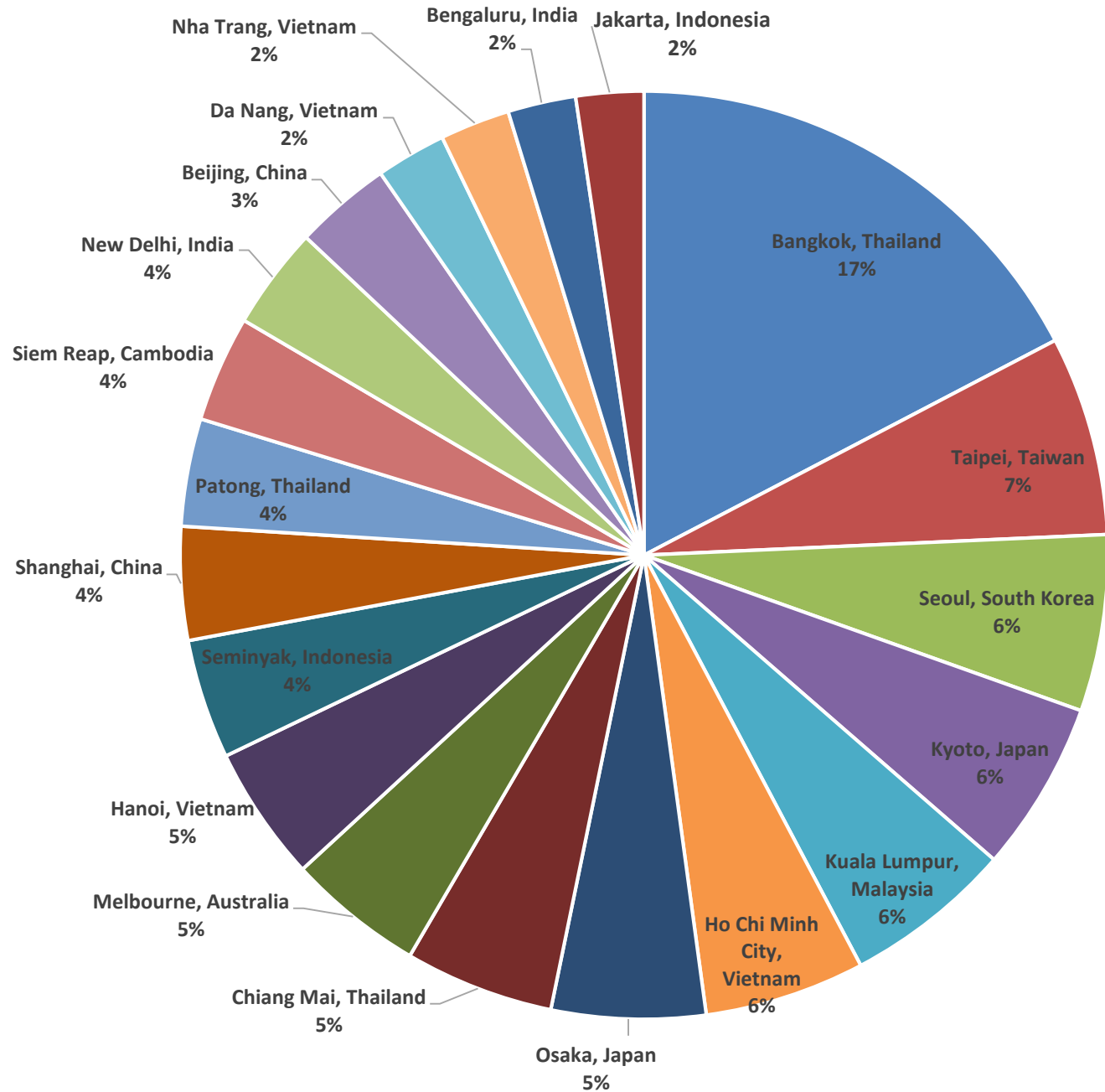
Top Asia Pacific Destinations

Top Ten Destinations

- Japan
- India
- Thailand
- Australia
- Indonesia
- China
- Philippines
- Malaysia
- Vietnam
- Taiwan



Top Cities in Asia Pacific



Interest?



What interests Chinese Travelers



Popular Destinations in China

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,
Fushimi Inari-taisha Shrine, Japan
Old Quarter, Vietnam
N Seoul Tower, South Korea
Sacred Monkey Forest Sanctuary, Indonesia
Dotonbori, Japan

#1 Hong Kong

#2 Beijing

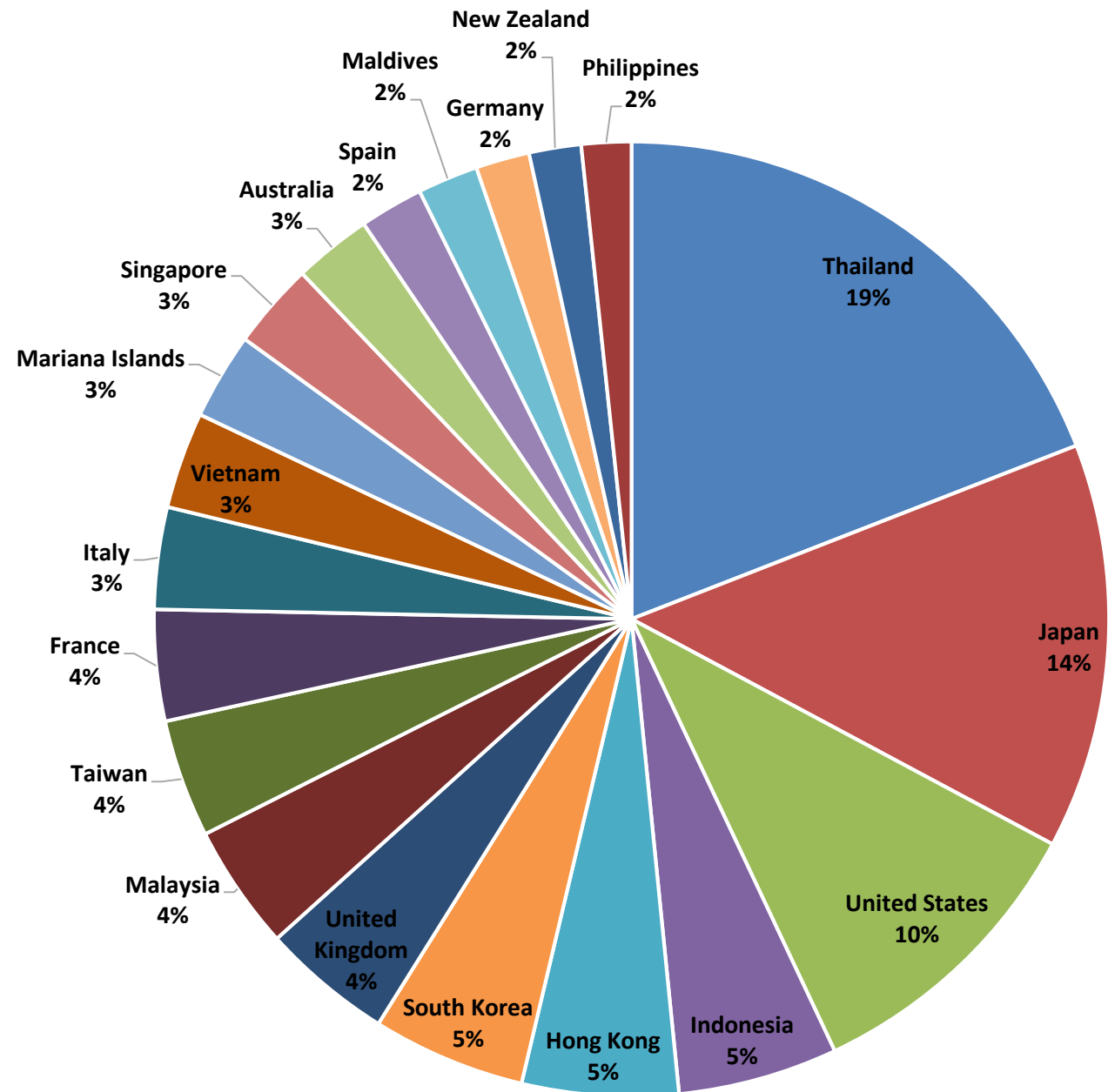
#3 Shanghai

#4 Lhasa

#5 Xi'an

#6 Jiuzhaigou County

Top Destinations Viewed by Chinese Travelers



Interest?



What interests Indian Travelers



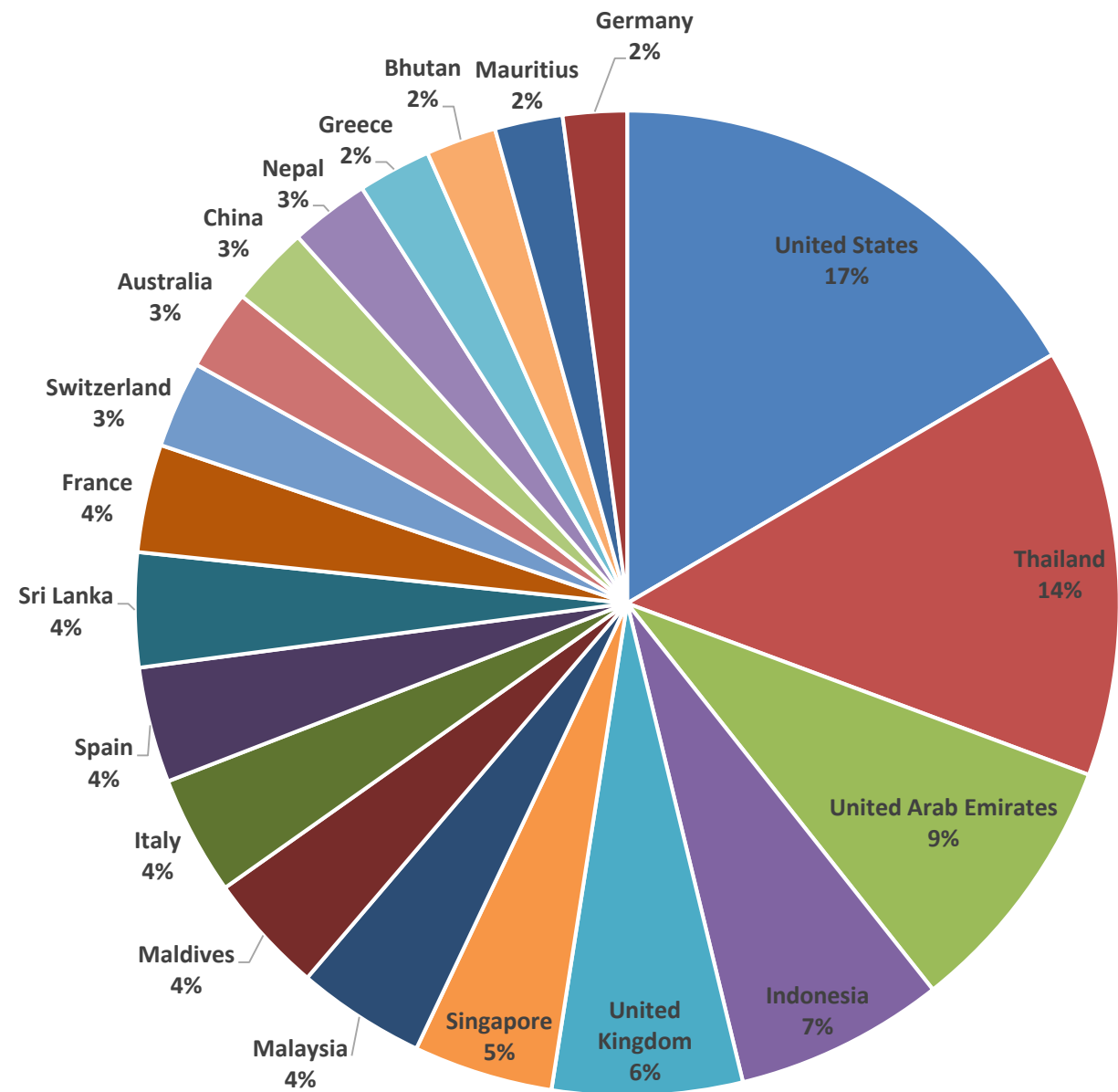
Overview Popular Destinations Location

Popular Destinations in India

- 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

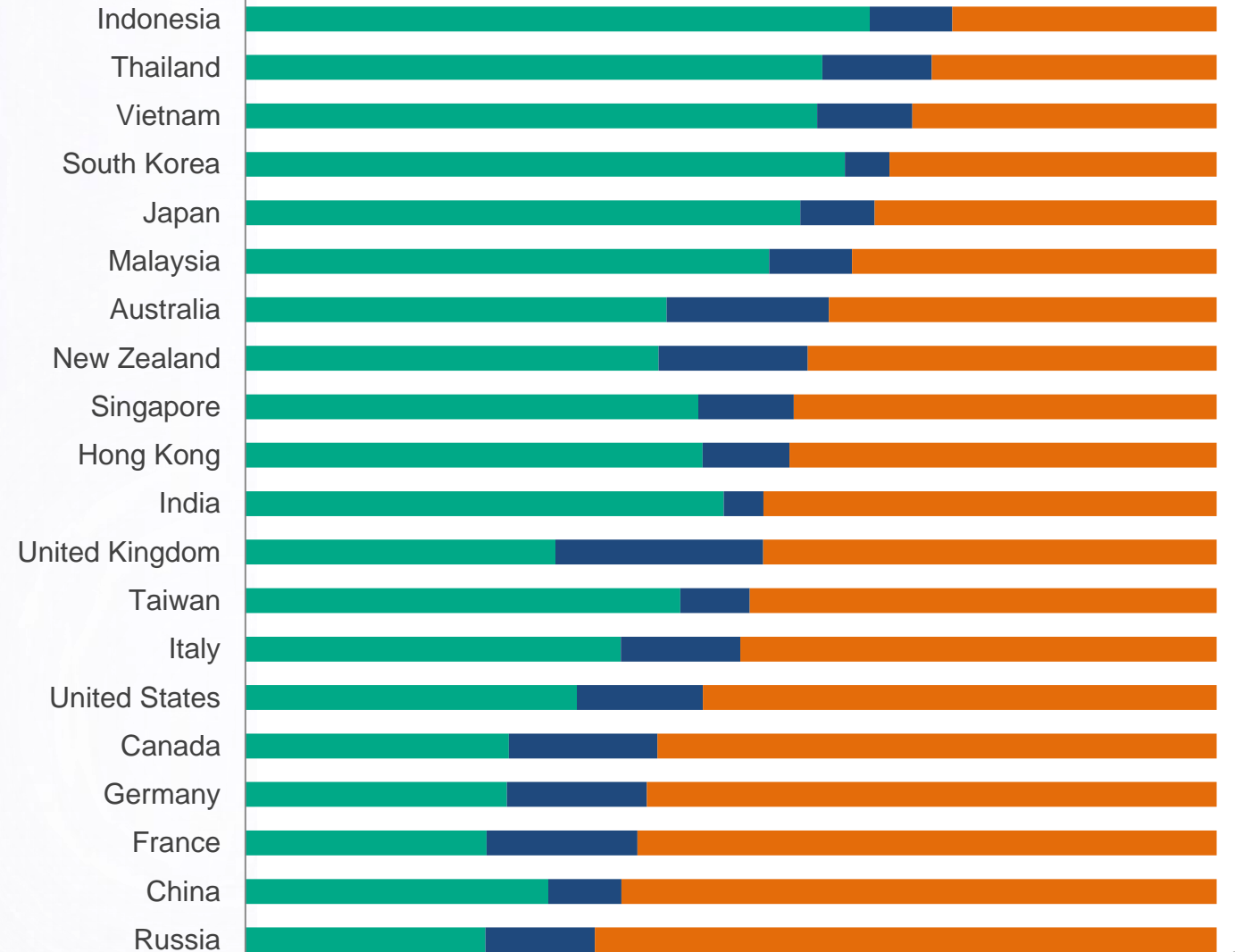
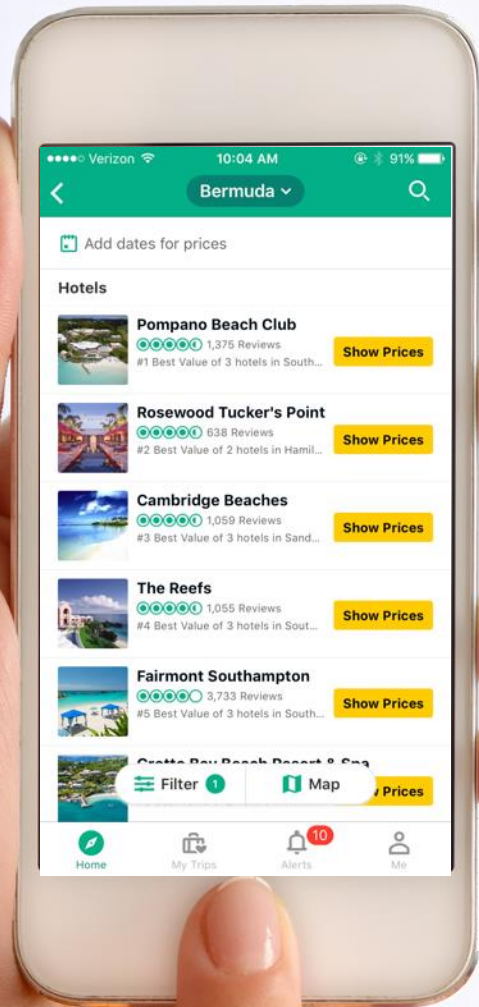
#5 Mumbai (Bombay) #6

Top Destinations Searched by Indian Travelers



Device Usage

■ Mobile ■ Tablet ■ Desktop



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?

<https://medium.com/21st-century-marketing/its-time-to-address-the-elephant-in-the-room-influencers-don-t-really-influence-anything-or-ee036b4abbb>
<http://www.gq-magazine.co.uk/article/influencer-marketing>



know better ● book better ● go better