tripadvisor®

TripBarometer

Travel Trends 2016

Executive Summary

In this edition of TripBarometer we measure global travel trends among TripAdvisor customers and business owners. Particular attention is paid to the needs and behaviors of three different generations – Millennials, Generation X and Baby Boomers when traveling for business and/or vacation.

One-third of travelers say they will increase their travel spend in 2016, and in South Africa and China this rises to half of participants. Among the key reason for travelers increasing their spend is to reward them/their families and to tick off a destination on their wish list. The chief spenders in 2016 are Australians, who have taken over from Switzerland in terms on how much they plan to spend on vacation. Despite two in five Millennials planning to increase spend, spending power resides with Baby Boomers whose budget is three times that of the average Millennial consumer.

Just 13% of participants say they will reduce their travel budget in 2016 and their reasons are predominantly financially driven. More than one-third state their financial situation has changed. 31% of Millennials have not saved enough money to travel and 30% expect to visit less expensive countries. This price-conscious approach is a trend we see for this generation across the report.

Two-thirds of travelers book their vacation via online platforms: 74% of Irish travelers do so – the highest score globally. One in five Baby Boomers book their accommodation offline and eight percent of Millennials use mobile apps to book accommodation. Price, habit and positive experiences guide travelers' booking behaviors.

73% of travelers voted TripAdvisor ahead of word-of-mouth, content and official hotel ratings as the most influential source of information for vacations – this is highest among Generation X (74%) and Australian (82%) travelers. Heading to a new destination is the key influencer for travelers when selecting where to go on vacation, especially in South America where four in five travelers are influenced by this.

The overall behaviors among the different generations show some interesting insights. Millennials are highly influenced by online and media content. They are also engaged and adventurous, heading to destinations for a range of options from adventure travel to spiritual escapes. Generation X travelers seek vacations of personal and financial value. They enjoy a mix of work and play and in some cases balancing family activities that influence their behavior. Baby Boomers enjoy the familiarity they have established with certain locations or hotels. Their vacations are more routine and could include cultural activities and reconnecting with their ancestry.

Business optimism remains high at 73% globally. In North America, four in five business owners are optimistic about 2016, retaining top spot among the regions covered in the study. When looking at the local level, 90% of Mexican hoteliers are optimistic heading into 2016, followed shortly by their Indonesian counterparts.

Two-thirds of businesses believe local events and congresses will positively impact profitability. Half of hoteliers feel tourist attractions and press coverage will also have positive effects. External factors such as flight fares and the global and national economy are expected to have the most negative impact on profitability according to hoteliers (53%, 38% and 35% respectively).

More than 90% of business representatives rated online traveler reviews, repeat business and increased direct bookings as the three most important factors to the future of their business. Nearly all (97%) of Indonesian and Mexican businesses feel enabling guests to book online and staff training are essential to the future of business.

Online reputation management is the chief investment priority for businesses and while just over one-quarter will be recruiting in 2016, more than half (56%) will invest in upskilling their existing staff members.

One-third of hoteliers say they will continue offering new services for free. Brazilian business owners top the list with 56% planning to offer new amenities for free. On the flip-side, 57% of Russian hoteliers will be charging for any new services offered in 2016.

TRIPBAROMETER TRAVELER RESPONDENTS

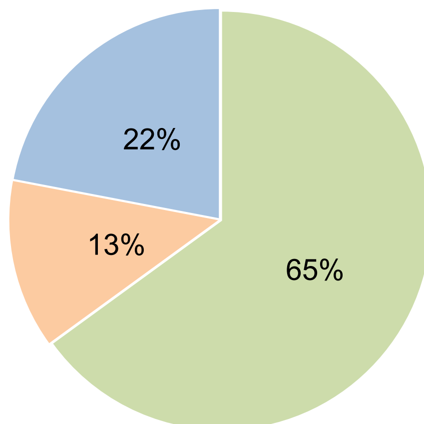
Demography

34,026 participants

Planning trips in 2016

90% Domestic leisure

85% International leisure



Millennials

37% male

63% female

Generation X

45% male

55% female

Baby Boomers

60% male

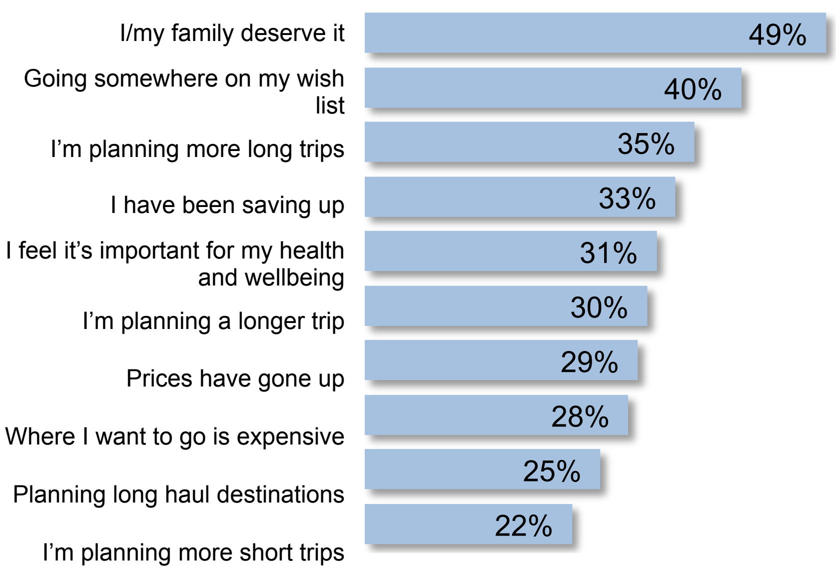
40% female

Base: All respondents (34,026), Millennials (7,552), Generation X (22,180), Baby Boomers (4,294)

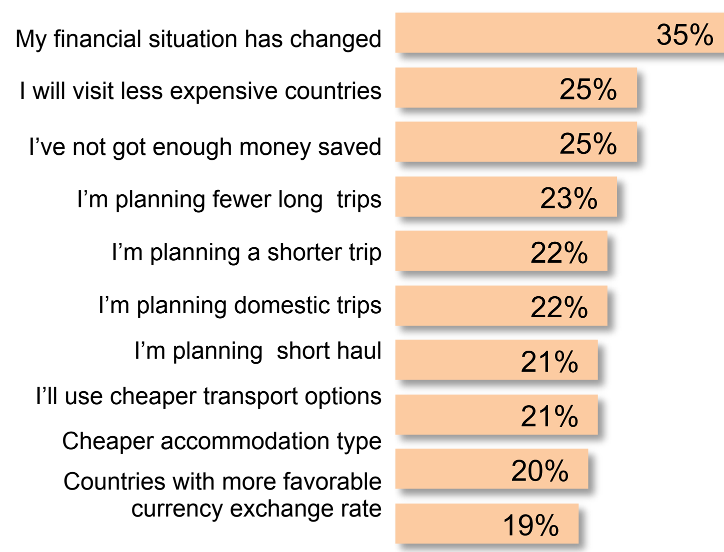
TRAVELER SPENDING PLANS

One-third of travelers will up travel spend in 2016

Reasons for spending more (top 10)



Reasons for spending less (top 10)



CQ15 How much do you intend to spend on your holidays/vacations in 2016? All respondents (34,026) Millennials (7,552), Generation X (22,180), Baby Boomers (4,294)
CQ17 Do you expect to spend more, less, or the same amount on holidays/vacations in the next 12 months as you did in the last 12 months? Base: All respondents (34,026), Millennials (7,552), Generation X (22,180), Baby Boomers (4,294)
CQ18. Why will you spend more on your holidays/vacations in the next 12 months than you did in the previous 12 months? Base: All spending more in 2016 (10,468)
CQ19. Why will you spend less on your holidays/vacations in the next 12 months than you did in the previous 12 months? Base: All spending less in 2016 (4,263)

Australians have overtaken the Swiss in terms of who is budgeting the most for their trips in 2016

$5,100

Avg. global spend

Market	Position		2015	Average 2016 budget ($)	Average 2016 budget (local currency)
Australia	1	↑	2	10,800	15,000
Switzerland	2	↓	1	10,100	9,700
United States	3	↑	4	8,400	8,400
United Kingdom	4	↑	5	8,200	5,300
New Zealand	5	↓	3	7,900	11,700
Canada	6	↑	7	6,400	8,500
Austria	7	↑	8	6,300	5,600
Germany	8	↓	6	6,200	5,500
France	9	↑	12	5,900	5,200
Argentina	10	↑	13	5,900	56,100
Ireland	11	↓	9	5,600	4,900
Japan	12	↑	11	5,500	665,900
Spain	13	↑	14	4,500	3,900
Mexico	14		n/a	4,100	68,800
Italy	15	↑	18	3,900	3,400
China	16	↓	10	3,500	22,800
Brazil	17		17	3,100	12,300
India	18	↓	16	3,100	202,200
Portugal	19		19	3,000	2,700
Turkey	20	↑	25	2,900	8,600
Russia	21		21	2,900	181,900
South Africa	22	↓	15	2,600	36,500
Greece	23	↓	20	2,500	2,200
Thailand	24		24	2,200	79,300
Malaysia	25	↓	23	2,100	9,000
Indonesia	26	↓	22	1,300	18,668,500

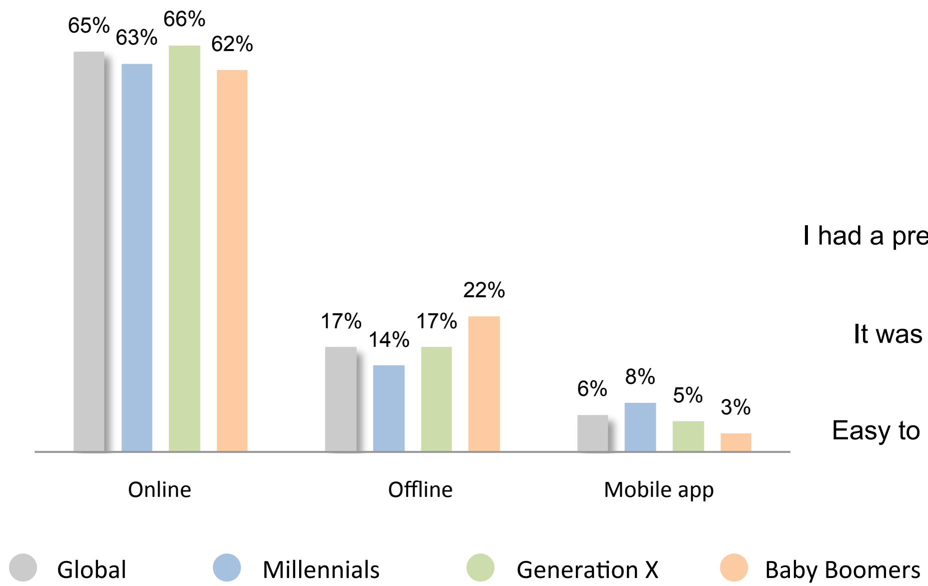
Base: All consumer respondents who gave an actual value for their 2016 budget. All bases are above 100.


BOOKING CHANNELS & TRAVEL PLANNING

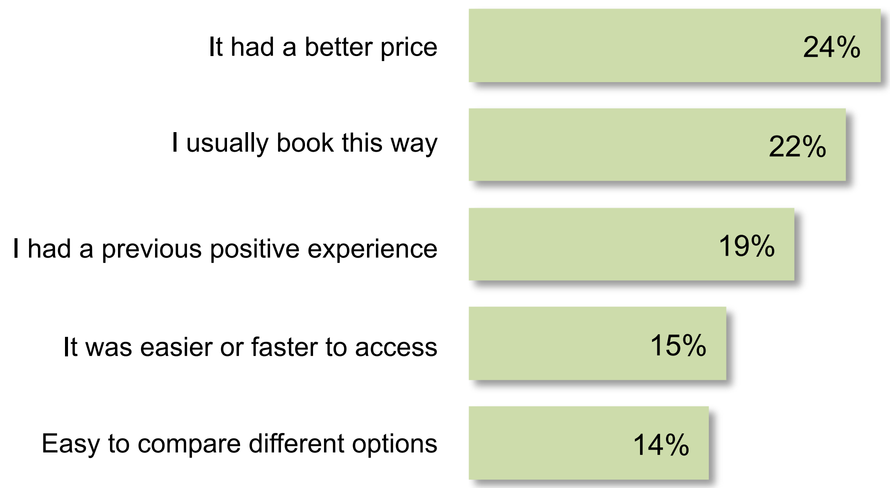
Two-thirds of travelers use online channels to make accommodation bookings

- One in five Baby Boomers use offline channels to make room reservations
- Price aside, travelers rely on habit, experience and ease of access when making bookings

Channel used to book accommodation



Main reason for booking this way

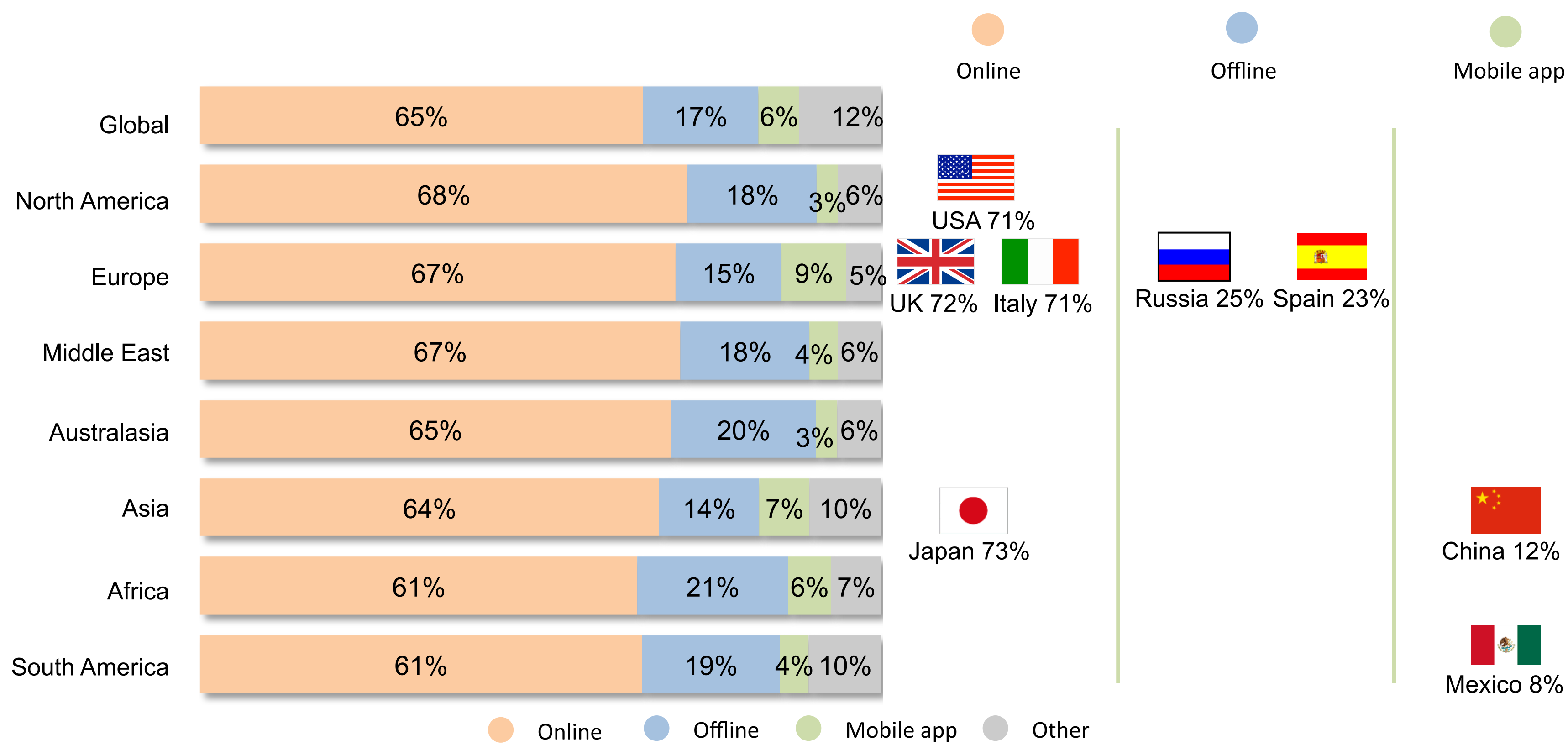


CQ6. Which of the following did you use to book the accommodation for your last holiday/vacation? Base: All respondents (34,026), Millennials (7,552), Generation X (22,180), Baby Boomers (4,294)
CQ7. What was the main reason you booked this way? Base: All who booked own accommodation (31,653)

Asian travelers least likely to use offline methods to book accommodation

- US, UK and Italian travelers stand out as online booking channel users, whereas the Chinese are most likely to make bookings via mobile apps

Channel used to book accommodation

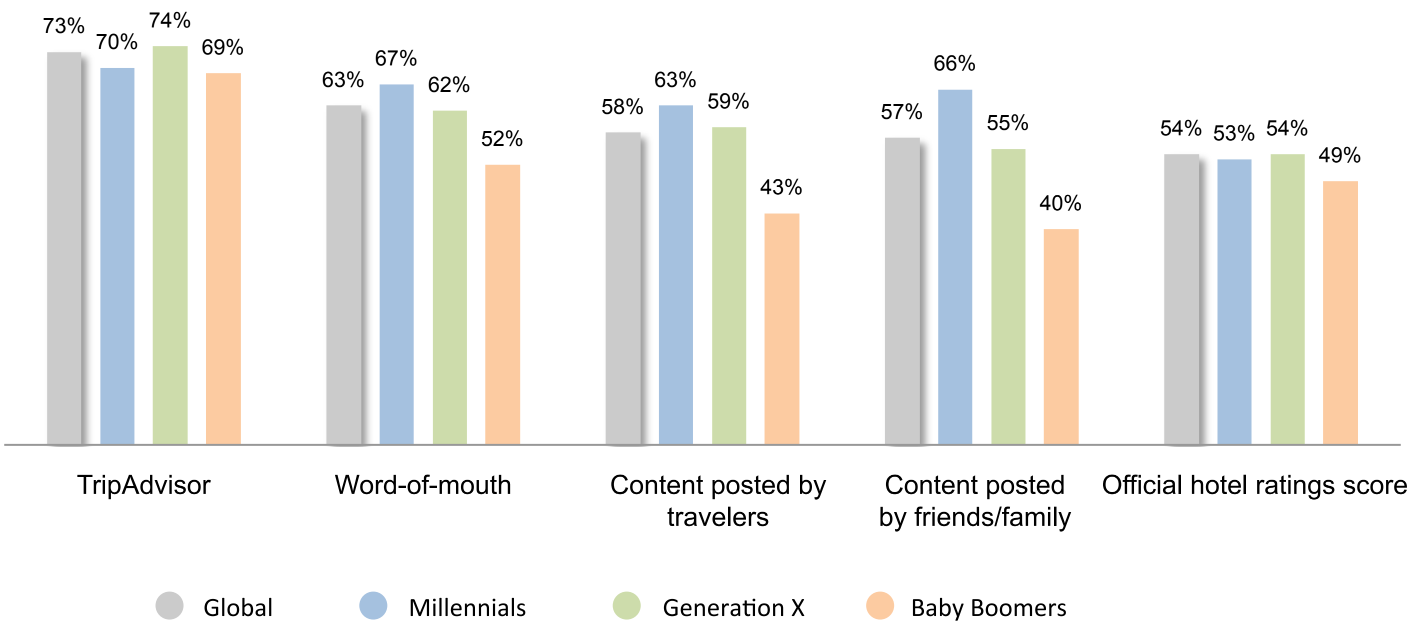


CQ6. Which of the following did you use to book the accommodation for your last holiday/vacation? Base: All respondents (34,026), Africa (747), Asia (4,708), Australasia (1,548), Europe (16,080), Middle East (387), North America (5,844), South America (4,712)

TripAdvisor is the leading source of information for travelers across all generations

- 73% of travelers cite TripAdvisor as an important source of influence when making their travel plans. This is especially true for Generation X travelers.
- Millennials are highly influenced by the power of recommendations.

Influence of sources when gathering ideas (top 5)



CQ10. To what extent do each of the following sources of information influence you when you are gathering ideas and inspiration for your holidays/vacations? Base: All respondents (34,026), Millennials (7,552), Generation X (22,180), Baby Boomers (4,294)

DESTINATION INFLUENCES ACROSS TRAVELER GENERATIONS

‘Going somewhere new’ influences three-quarters of travelers’ vacation plans

- Travelers are seeking new experiences: ‘learning something new’ and ‘trying something new’ are cited among the top five influencers when making travel plans
- Flight and accommodation prices are key drivers in traveler decisions

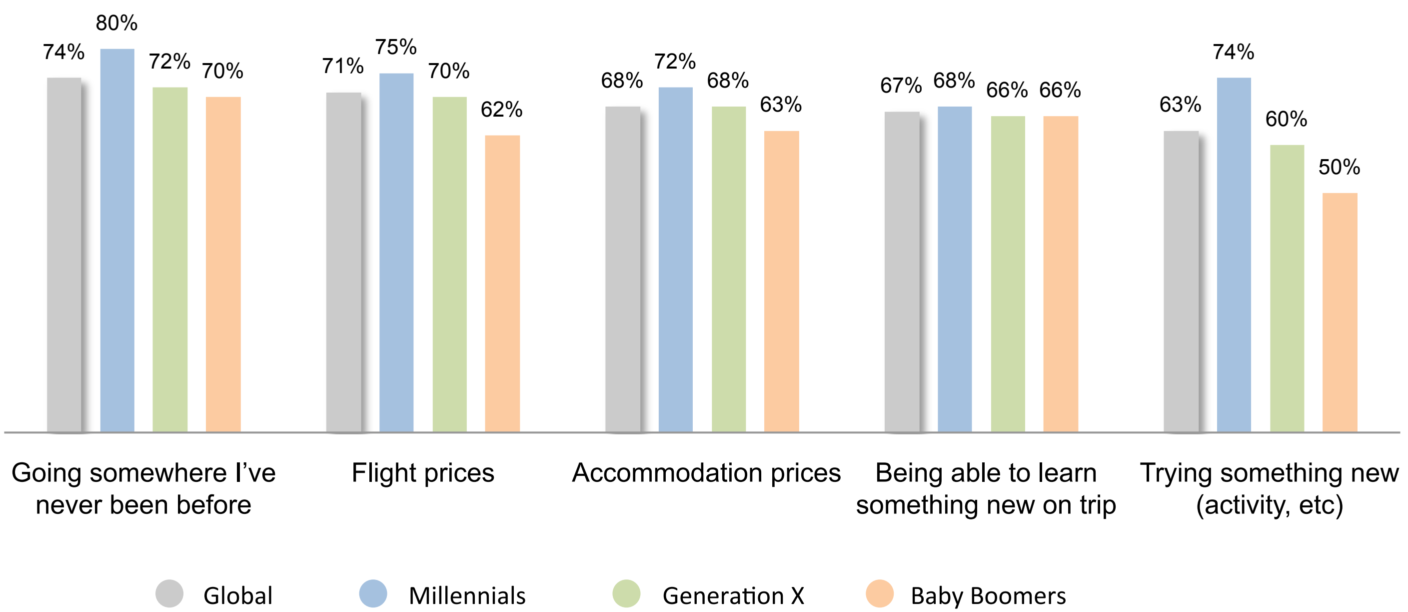
Influences when making travel plans (top 10)

CQ11. Thinking again about your last holiday/vacation to what extent did the following have an influence when making your travel plans? Base: All respondents (34,026)

Millennials are seeking excitement and new experiences, but remain price conscious

- Millennials are engaged, adventurous and open to new ideas, and therefore are more highly influenced by a variety of factors than other generations

Influence when making travel plans (top 5)

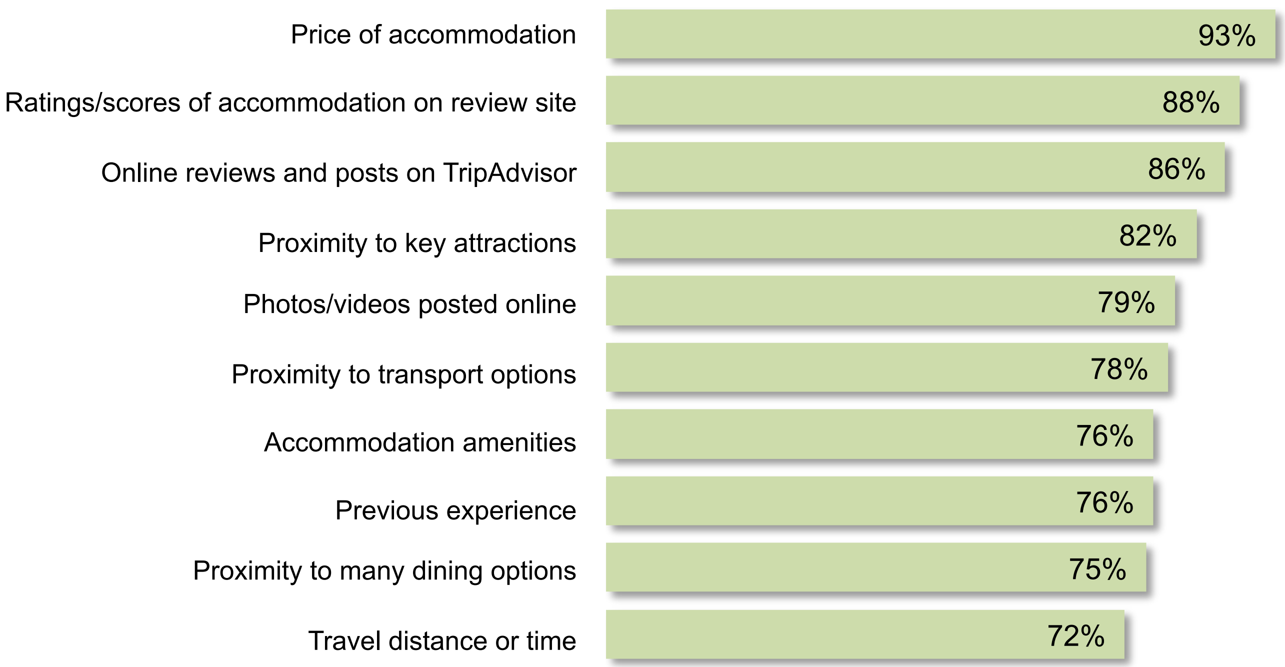


CQ11. Thinking again about your last holiday/vacation to what extent did the following have an influence when making your travel plans? Base: Global (34,026), Millennials (7,552), Generation X (22,180), Baby Boomers (4,294)

Price and reviews are most important decision-making factors when booking accommodation

- Price is important for all travelers – they aim to also balance online ratings and reviews with their own previous experience to decide on their accommodation

Importance to booking accommodation (top 10)

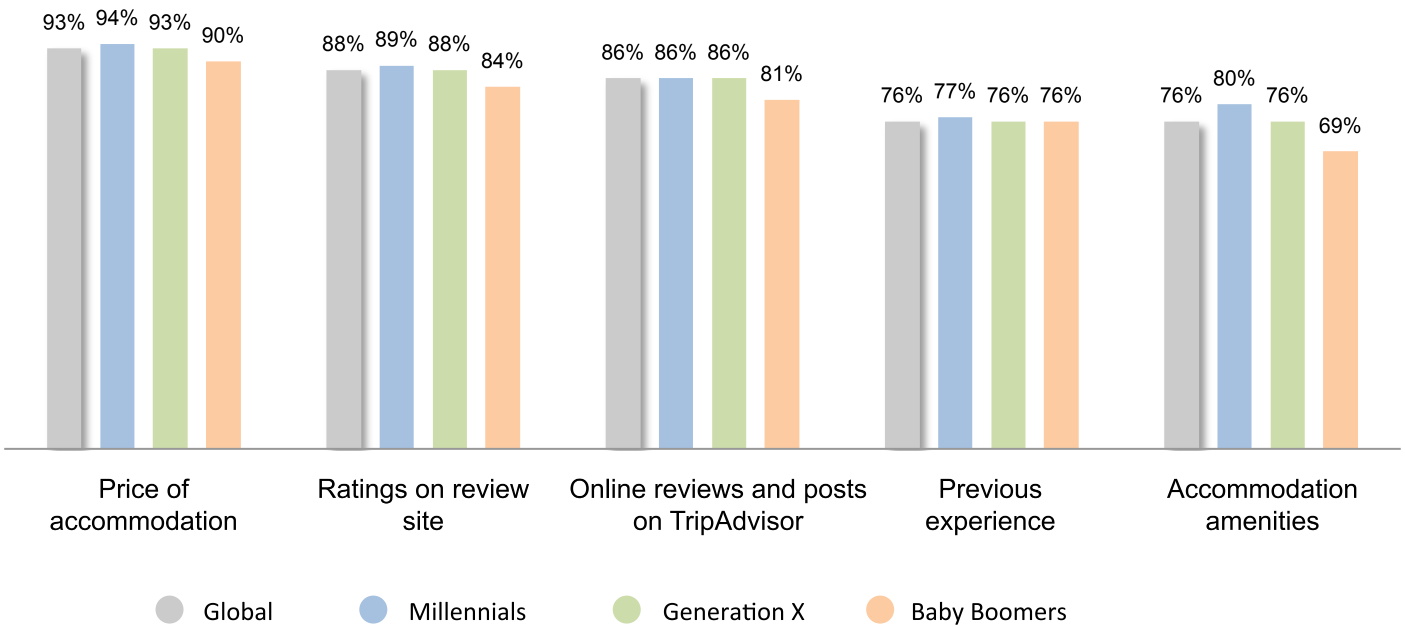


CQ12. Staying with your last holiday/vacation, how important were each of the following in your final decision to book your accommodation? Base: All respondents (34.026)

Three in four travelers value past experience and amenities

- Aside from price, experience and reviews, accommodation amenities also play a key role for Millennials and Generation X.

Importance in booking accommodation

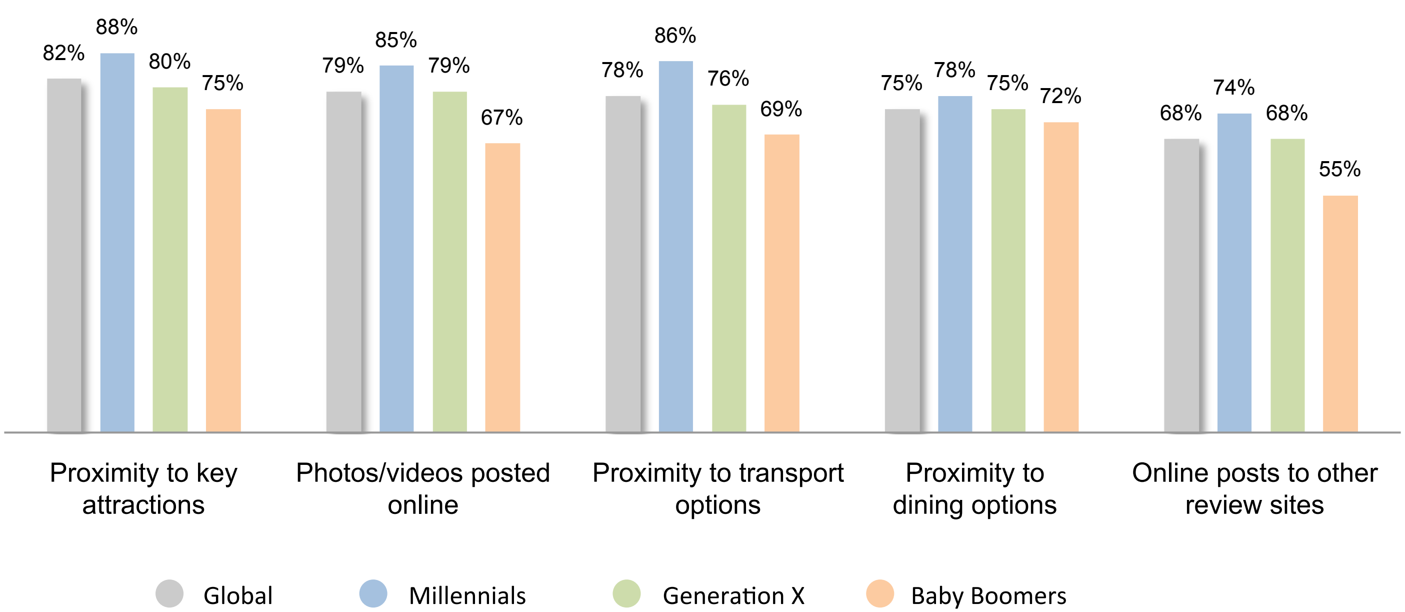


CQ12. Staying with your last holiday/vacation, how important were each of the following in your final decision to book your accommodation?
Base: All respondents (34,026), Millennials (7,552), Generation X (22,180), Baby Boomers (4,294)

Location location location

- Millennials want to be close to dining options, key attractions and transport options and are also more likely to pay attention to online media and site reviews than Generation X and Baby Boomers.

Importance in booking accommodation



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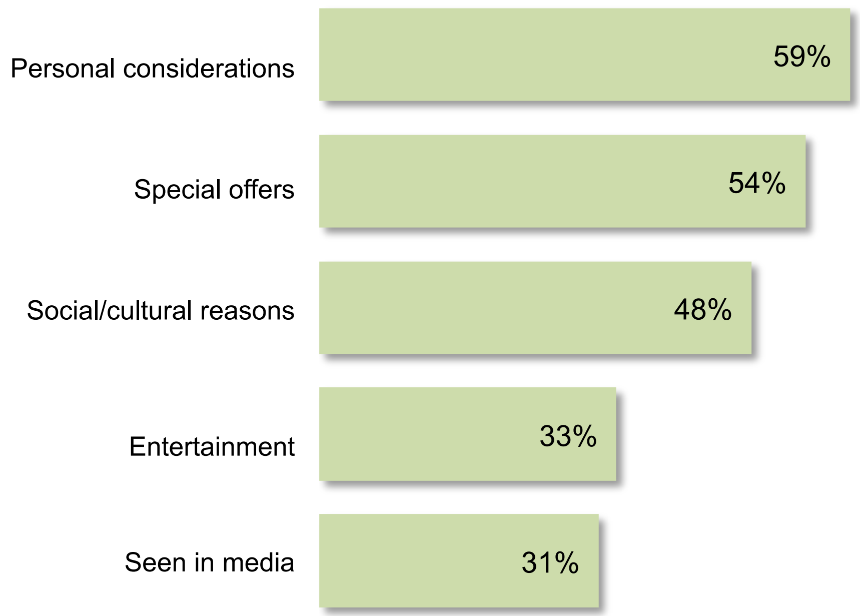
Base: All respondents (34,026), Millennials (7,552), Generation X (22,180), Baby Boomers (4,294)

Personal considerations influence travelers' destination choices

- More than half of travelers select destinations because of personal considerations or special offers, whilst social and cultural reasons are also key drivers when selecting a destination

Visited a destination because of the following (nets)

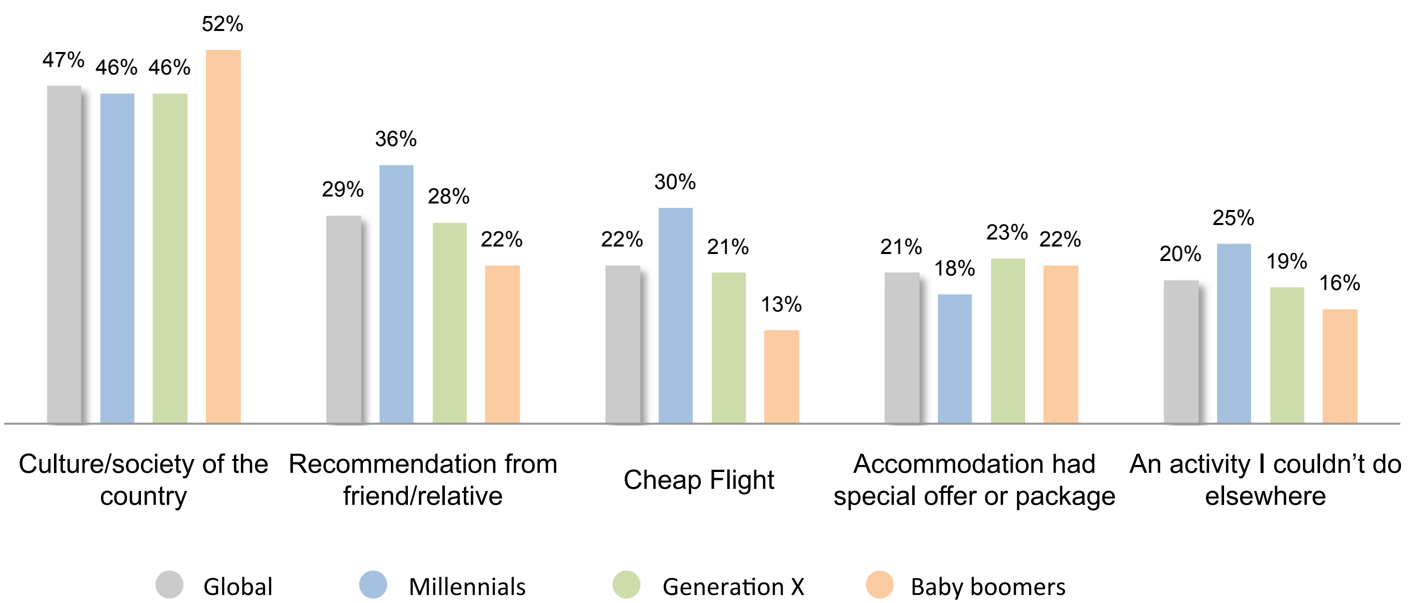


CQ9. Thinking more generally about travelling, have you ever visited a destination because of any of the following reasons ? Base: All respondents (34,026), Millennials (7,552), Generation X (22,180), Baby Boomers (4,294)

Culture is the big lure for any destination

- Half of Baby Boomers seek cultural vacations when traveling
- However, for Millennials, positive feedback and a well priced flight tip the choice
- For older groups, recommendations and a hotel special offer are almost equally important.

Visited a destination because of the following (top 5)

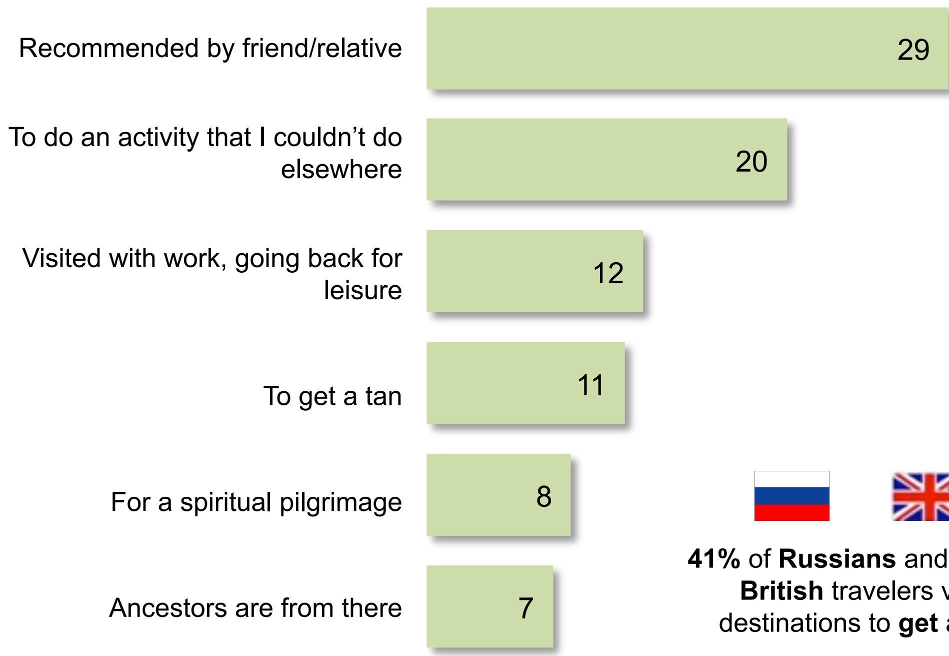


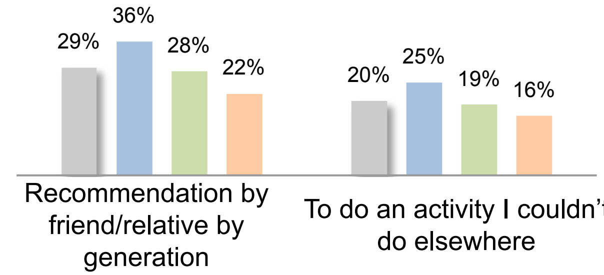
CQ9. Thinking more generally about travelling, have you ever visited a destination because of any of the following reasons ? Base: All respondents (34,026), Millennials (7,552), Generation X (22,180), Baby Boomers (4,294)

Personal considerations vary among travelers

- Dominant personal considerations included recommendations from friends and relatives, and doing activities that individuals could not do elsewhere.

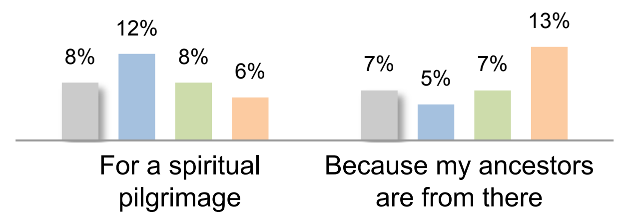
Visited a destination because of…





Millennials listen to the recommendations from family and friends and travel somewhere for a unique activity

41% of **Russians** and **23%** of **British** travelers visit destinations to **get a tan**



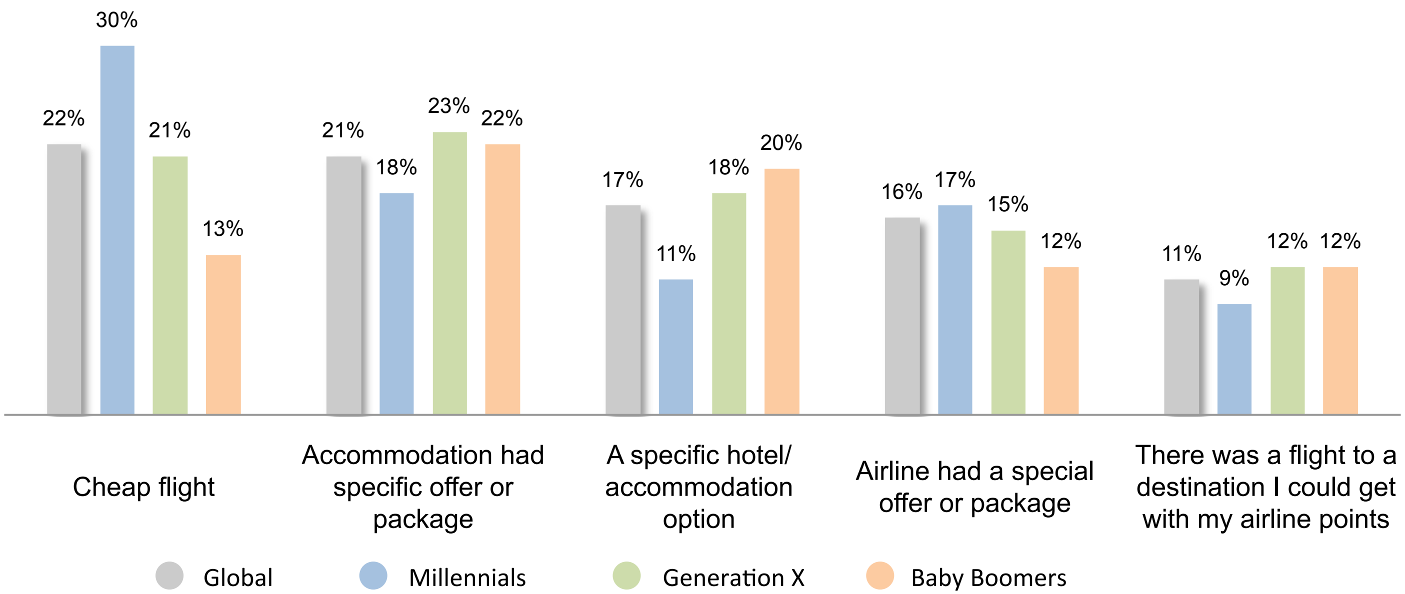
Global Millennials Generation X Baby Boomers

CQ9. Thinking more generally about traveling, have you ever visited a destination because of any of the following reasons ? Base: All respondents (34,026), Millennials (7,552), Generation X (22,180), Baby Boomers (4,294)

Different offers for different generations

- Price drives decisions about destination choice, but different generations are attracted to different offers.
- Cheap flights attract Millennials, whilst offers on accommodation are more likely to attract older generations.

Visited a destination because of the following (top 5)



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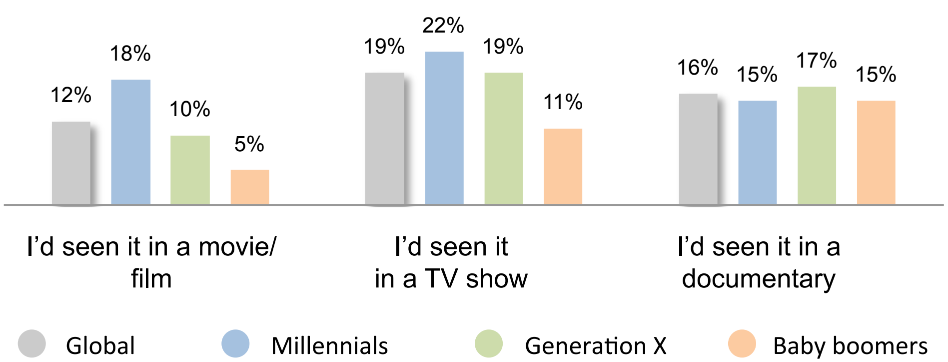
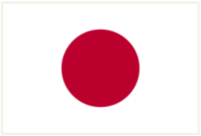
One in five travelers have visited a destination they saw in a TV show

- There are substantial differences in the role media plays across generations and nationalities.
- Millennials are more likely to be influenced by movies and TV shows, whereas Baby Boomers are more likely to be influenced by documentaries.

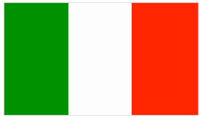
Importance of media on choice of destination by generation



20% of **Chinese travelers** are influenced by a **movie/film**



TV shows influence **33%** of holiday makers from **Japan**



Almost **one-quarter** (24%) of **Italians** decide on their destination based on a **documentary**

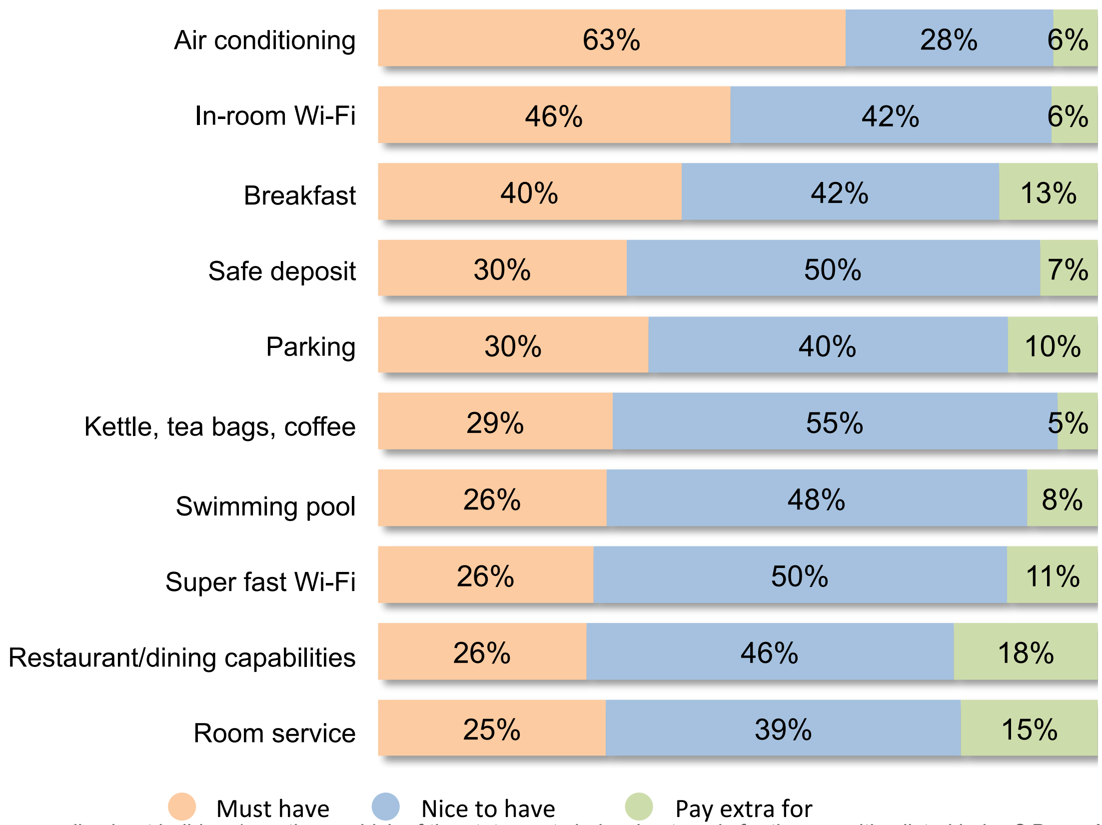
CQ9. Thinking more generally about travelling, have you ever visited a destination because of any of the following reasons ? Base: All respondents (34,026), Millennials (7,552), Generation X (22,180), Baby Boomers (4,294)

DECISION-MAKING FACTORS ACROSS TRAVELER GENERATIONS

Global travelers want to keep cool and connected

- Nearly two in three travelers 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.

Must-have amenities (top 10)

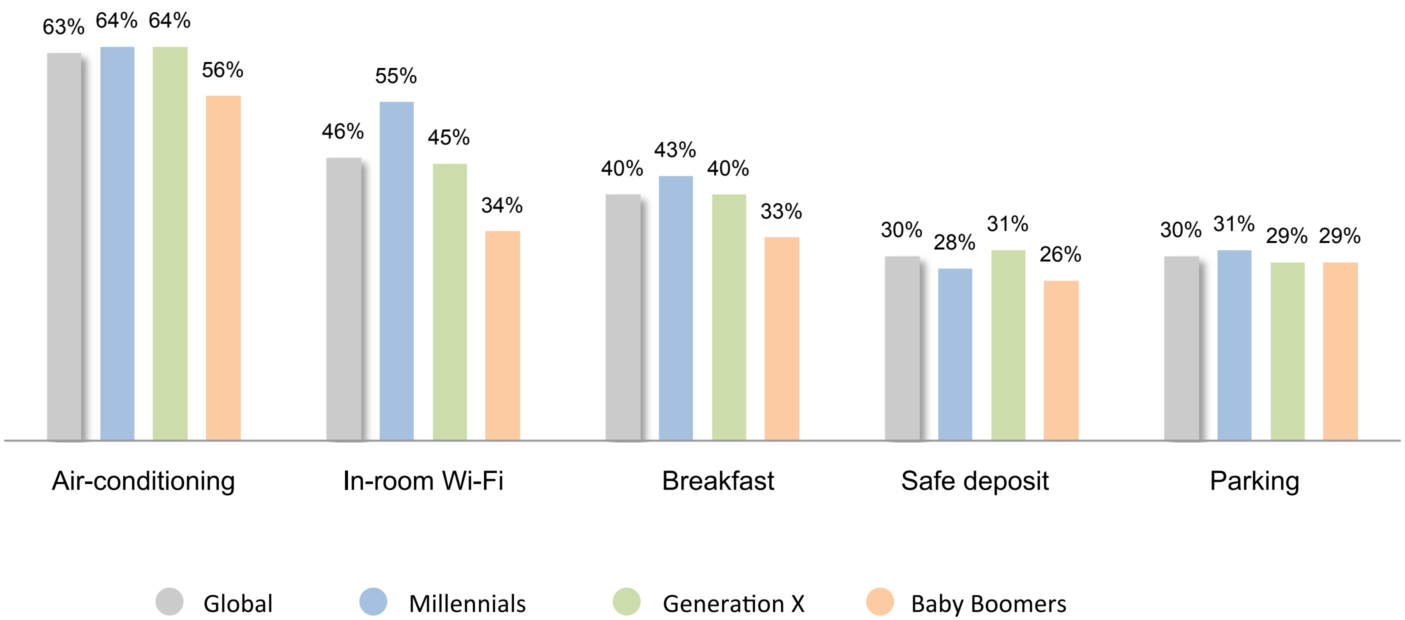


CQ13. Now thinking more generally about holidays/vacations, which of the statements below best apply for the amenities listed below? Base: All respondents (34,026)

Need for Wi-Fi strongest among Millennials

- While air-conditioning is seen as essential for all travelers, Millennials are more likely to consider the inclusion of in-room Wi-Fi and breakfast in the accommodation price as deal-breakers

Must have when booking accommodation: differences between generations (top 5)



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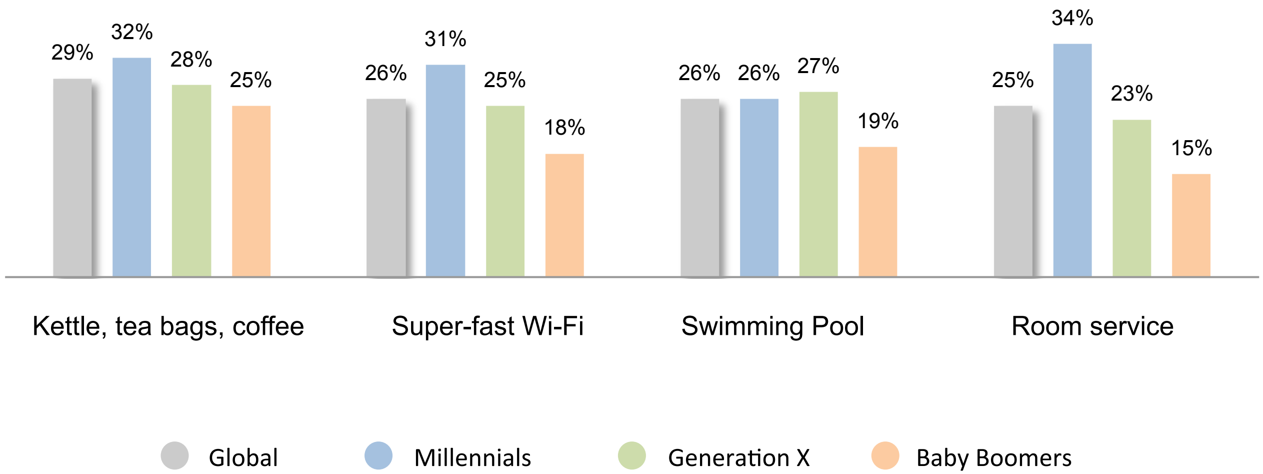
One-quarter of travelers will consider alternative accommodation if swimming pools are not on offer

- Millennials want it all, from kettles and super-fast Wi-Fi, to room service

Importance in booking accommodation: differences between generations



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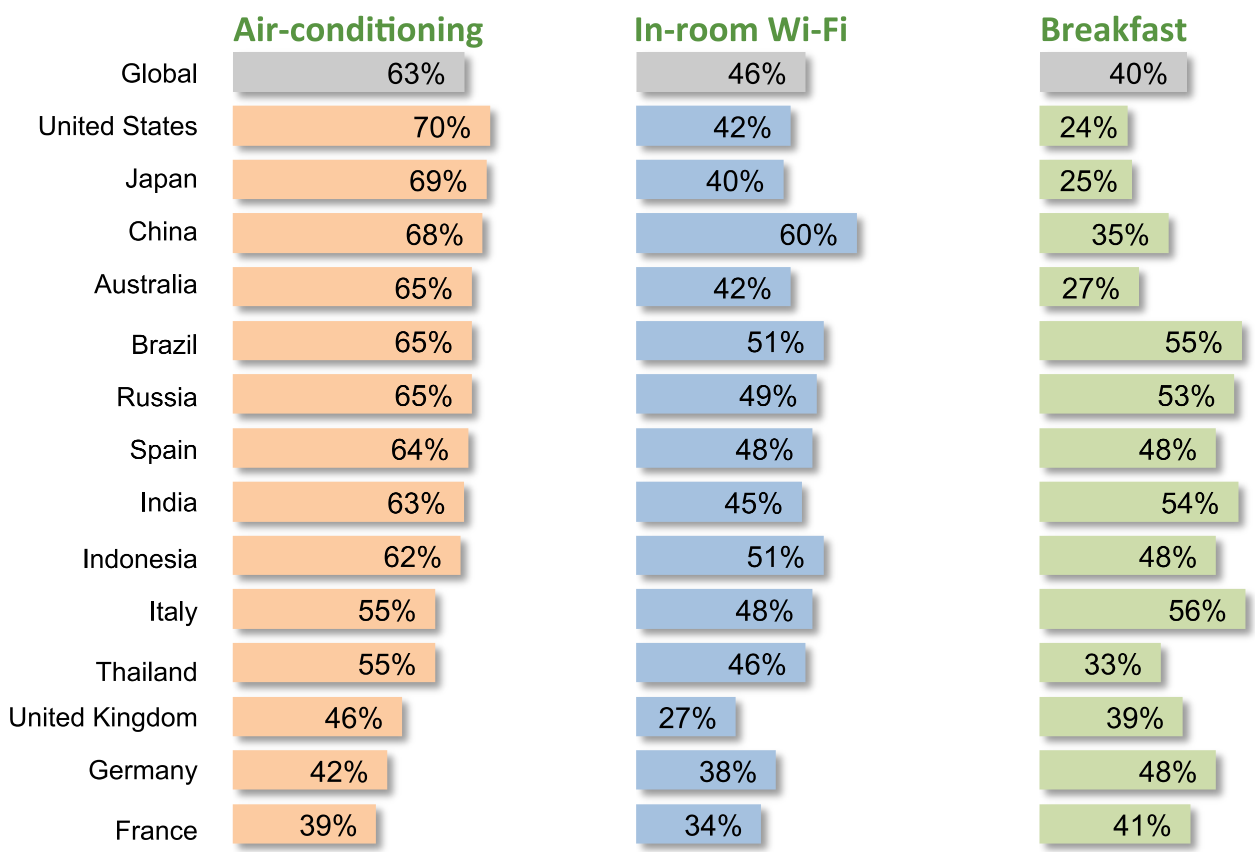
‘Must-have’ amenities vary by nationality

- US travelers are most likely to see air-conditioning as essential, while three in five Chinese will not book an accommodation that does not offer free in-room Wi-Fi.

Must-have amenities (top 3)



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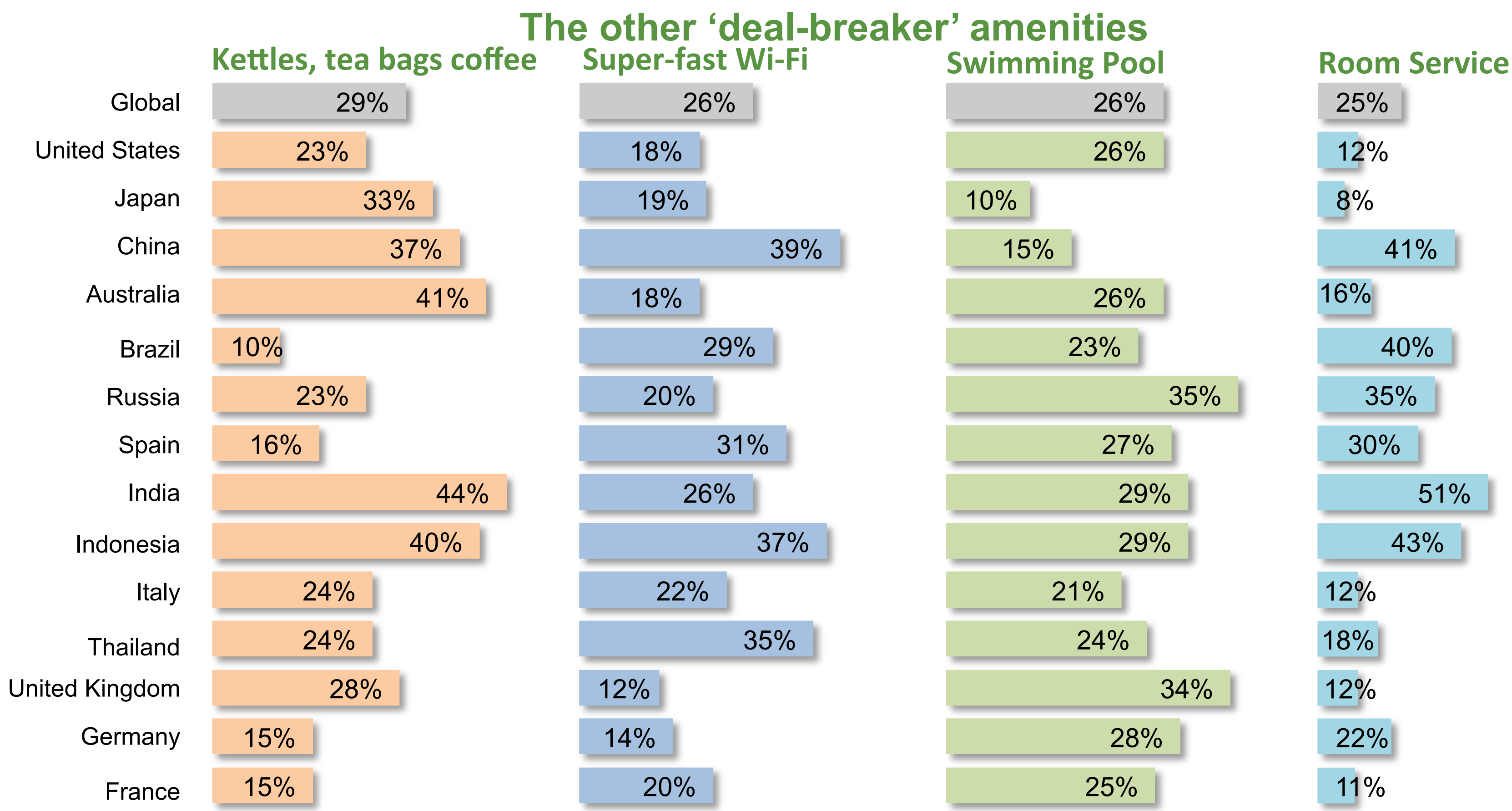
Don’t underestimate the importance of the kettle

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



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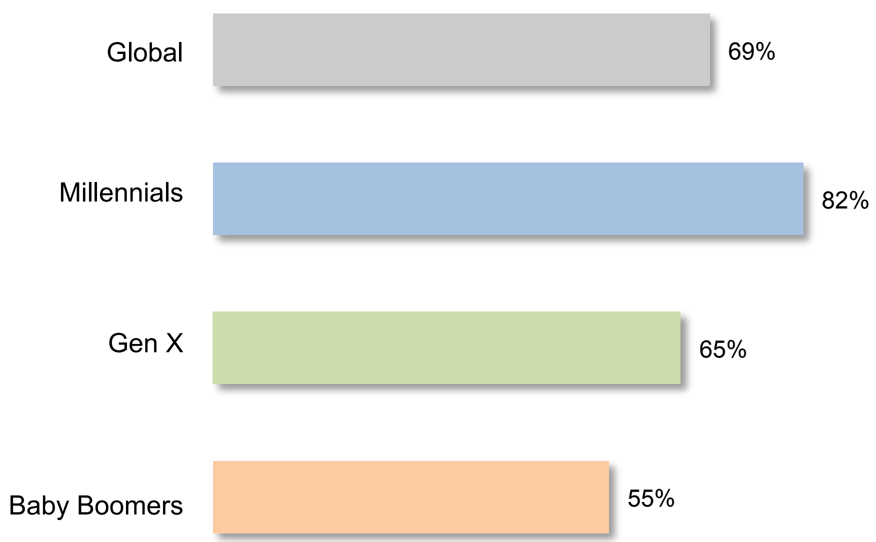
WHAT’S NEW IN TRAVEL FOR 2016

Adventure favors the young

- Seven in 10 travelers want to try something new in 2016, with cruises popular amongst all generations.
- Millennials are the most likely to want new experiences: 28% are planning adventure holidays next year.

Planning to try something new in 2016



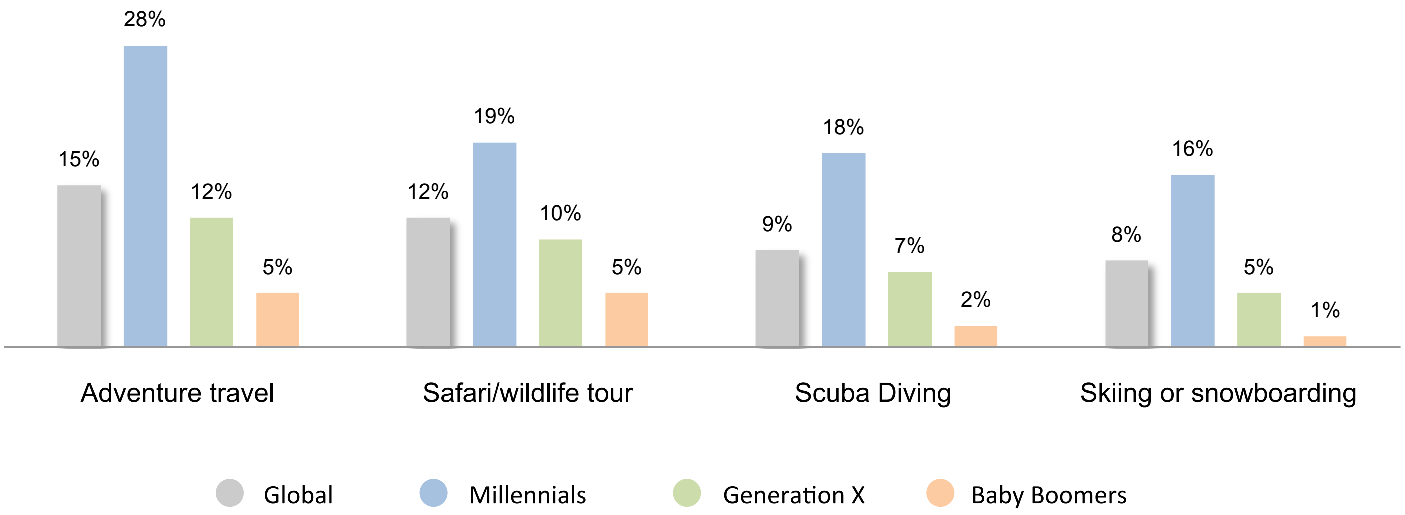
1st	2nd	3rd
Cruise 19%	Solo travel 17%	Adventure 15%
Adventure 28%	Solo travel 25%	Cruise 23%
Cruise 17%	Solo travel 14%	Adventure 12%
Cruise 15%	Group travel 11%	Solo travel 10%

Global   Millennials   Generation X   Baby Boomers

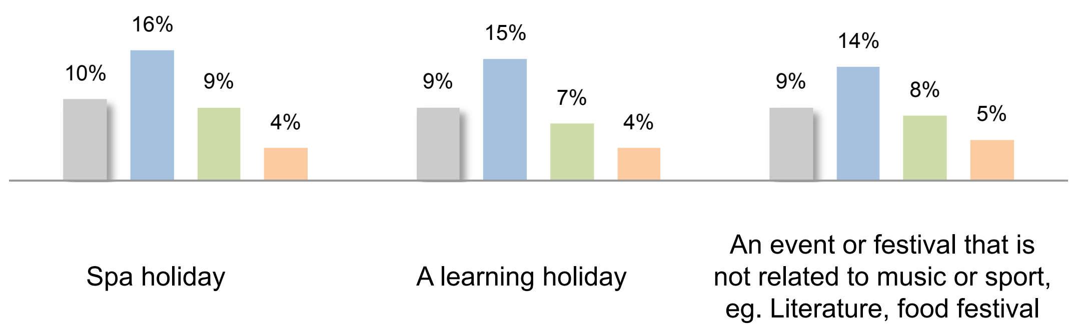
CQ20. Travel often allows us to try something new. Are you planning to try any of the following for the first time on holiday/vacation in 2016? Base: All respondents (34,026), Millennials (7,552), Generation X (22,180), Baby Boomers (4,294)

Millennials want new experiences

Millennials plan to be more adventurous…



…But adventure is not the only experience Millennials plan.



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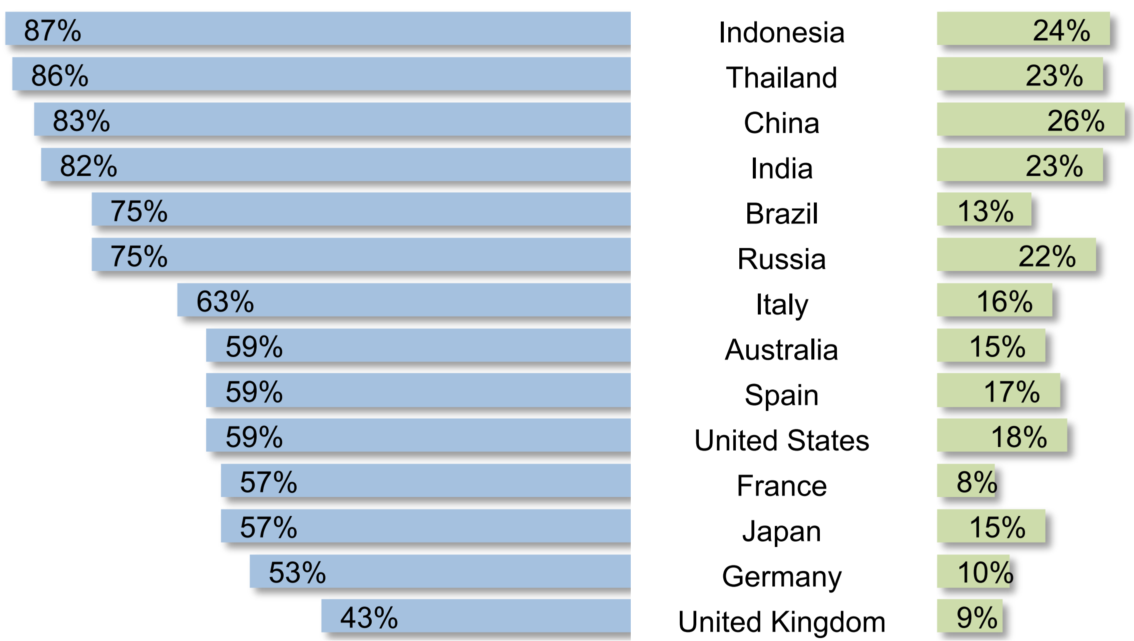
Base: All respondents (34,026), Millennials (7,552), Generation X (22,180), Baby Boomers (4,294)

Emerging markets lead the way in trying something new in 2016

- 87% of Indonesian and 86% Thai travelers want to try something new – with Chinese and Indian travelers slightly behind them (83% and 82% respectively).
- Globally, nearly one in five travelers (19%) plan to go on a cruise for the first time.

Planning to try something new **Planning to try a cruise**



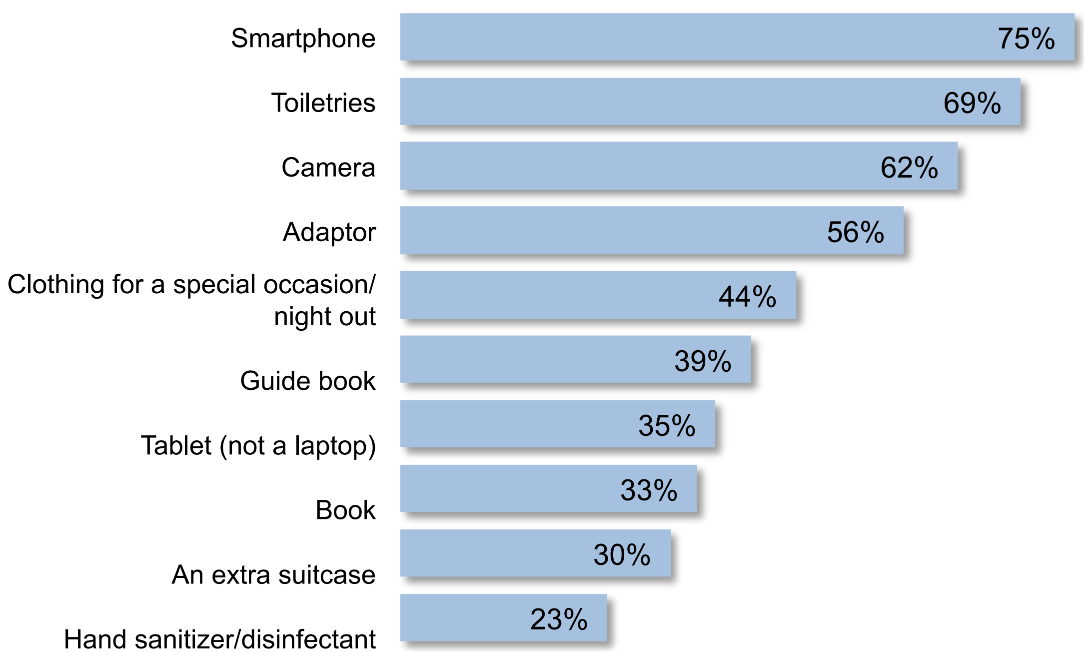
CQ20. Travel often allows us to try something new. Are you planning to try any of the following for the first time on holiday/vacation in 2016?
Base: All respondents (34,026)


TRAVEL ESSENTIALS

More travelers won't leave home without their smartphones than their toiletries

- Millennials are more likely to pack their smartphone than toiletries when they travel
- Baby Boomers are most likely to bring their camera and a guide book

Essential personal items when traveling (top 10)



	Millennials	Gen X	Baby Boomer
Smartphone	87%	73%	55%
Toiletries	67%	68%	75%
Camera	61%	61%	71%
Adaptor	53%	57%	63%
Clothing for a special occasion/ night out	49%	42%	45%
Guide book	34%	40%	45%
Tablet (not a laptop)	27%	37%	42%
Book	29%	33%	45%
An extra suitcase	33%	30%	22%
Hand sanitizer/disinfectant	24%	22%	29%

Significantly higher   Significantly lower

CQ14. Are there things you have to have with you when you travel? What are the essentials that you won't leave home without? Base: All respondents (34,026), Millennials (7,552), Generation X (22,180), Baby Boomers (4,294)

One-third of Millennials will take their own towel when traveling

- Millennials consider bringing their own towel essential, while Baby Boomers are the most likely to pack their e-reader.

Essential personal items when traveling

		Millennials	Gen X	Baby Boomer
Laptop	21%	21%	21%	22%
My own towel	19%	33%	14%	8%
E-book/E-reader	18%	15%	19%	28%
Notebook/journal	17%	19%	16%	21%
Dictionary/language books	12%	11%	11%	16%
Dietary/speciality foods	9%	9%	8%	8%
Wearable technology device	6%	10%	5%	4%
My own pillow	6%	6%	6%	7%

Significantly higher   Significantly lower

CQ14. Are there things you have to have with you when you travel? What are the essentials that you won't leave home without? Base: All respondents (34,026), Millennials (7,552), Generation X (22,180), Baby Boomers (4,294)

Top 5 nationalities most likely to be…

Snap-happy

Most likely to take a camera

1.	Russia	77%
2.	Canada	75%
3.	France	75%
4.	Argentina	74%
5.	Austria	74%

Best-dressed on holiday

Most likely to pack clothing for special occasions

1.	South Africa	68%
2.	Canada	65%
3.	Ireland	65%
4.	New Zealand	64%
5.	India	63%

Travel shoppers

Extra suitcase an essential travel item

1.	Indonesia	44%
2.	Argentina	42%
3.	China	41%
4.	Malaysia	41%
5.	Mexico	41%

"Germophobic"

Consider hand sanitizer an essential travel item

1.	India	43%
2.	Australia	42%
3.	Canada	39%
4.	South Africa	37%
5.	United States	37%

Bibliophiles

Most likely to take a book

1.	Ireland	51%
2.	Switzerland	50%
3.	Germany	48%
4.	Turkey	48%
5.	France	47%

CQ14. Are there things you have to have with you when you travel? What are the essentials that you won't leave home without? Base: All respondents (34,026), Millennials (7,552), Generation X (22,180), Baby Boomers (4,294)

Travel Trends 2016: **Business**

Optimism among business owners is high for 2016 – North America leads the way with eight in 10 businesses stating they are optimistic. Two-thirds of all businesses plan to introduce new services for guests in 2016.

More than 90 percent feel online reviews are important to the future of their business and online reputation management remains the top area for investment in 2016.

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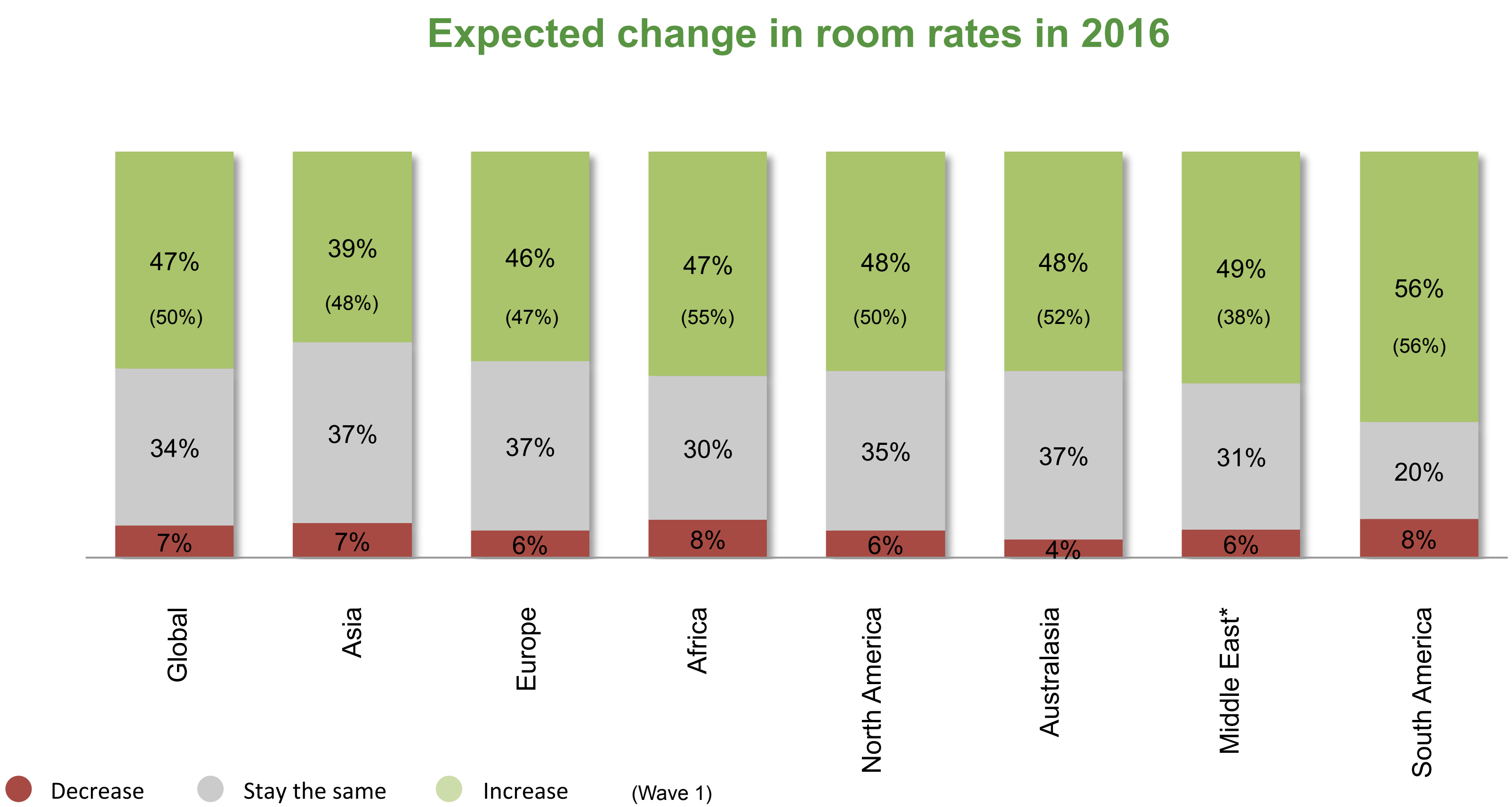
ECONOMY AND PROFITABILITY

The majority of hoteliers globally are planning to increase room rates in 2016

- Hoteliers in South America are the most likely to increase room rates in 2016

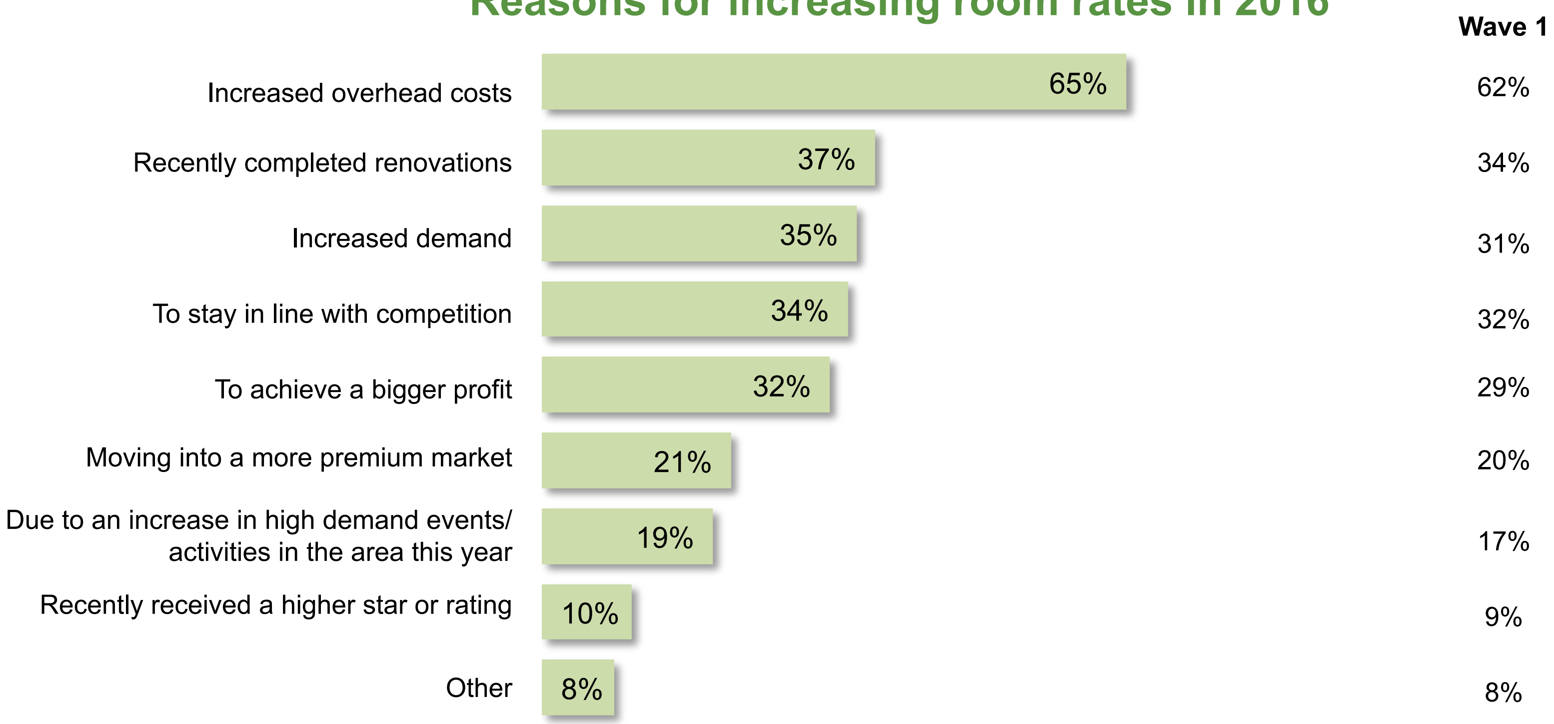


BQ18. Are you planning to increase, maintain or decrease room rates in 2016? The room rates will… Base: Global (10,756), Africa (620), Asia (1,309), Australasia (522), Europe (5,705), Middle East (88), N. America (1,173), S. America (1,521)

Increased overhead costs are the main driver for increasing room rates

- For most markets, newly completed renovations and increased demand are also key drivers for increasing room rates next year

Reasons for increasing room rates in 2016

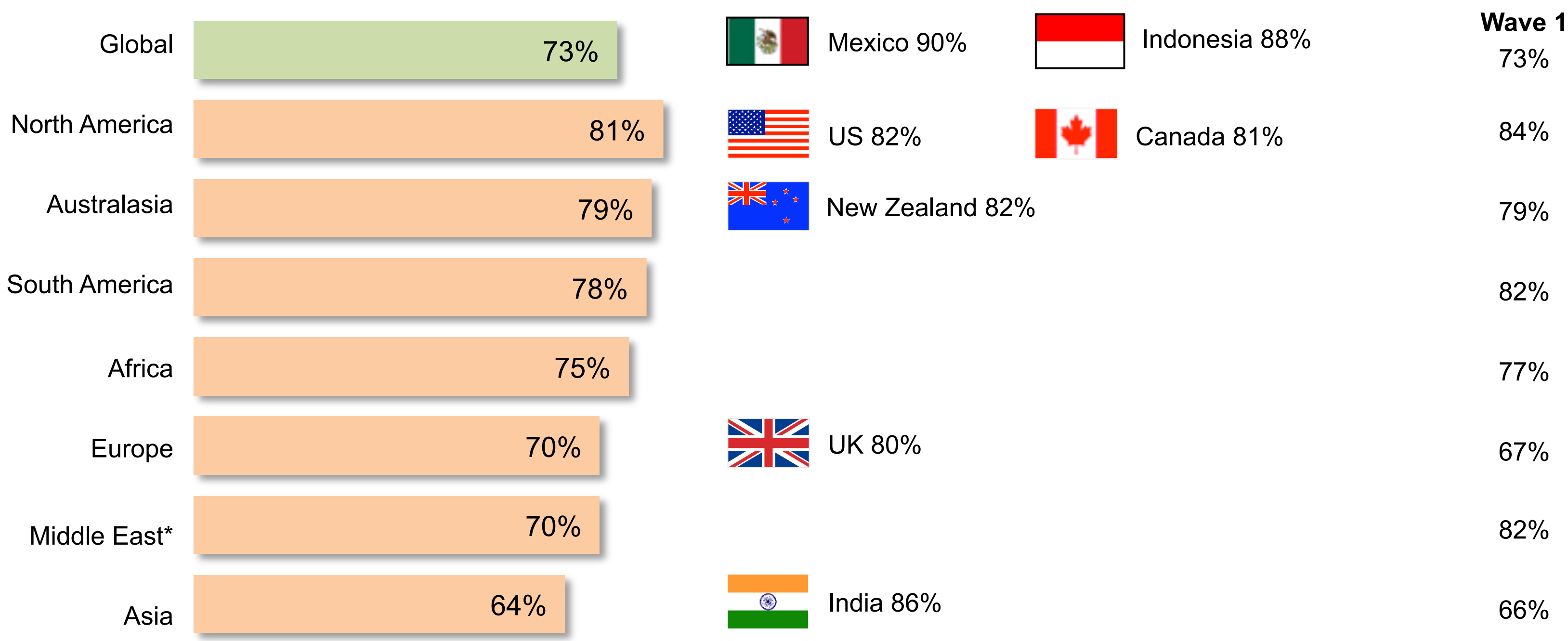


BQ19. Why are you planning to increase the room rates in 2016? Base: Business owners planning to increase room rates (4,851)

Three-quarters of business owners are optimistic about 2016

- Although percentages have decreased slightly since the previous wave of TripBarometer, business owners remain very optimistic about 2016
- Hoteliers in Europe are more optimistic now than they were at the start of the year

Optimism about business profitability

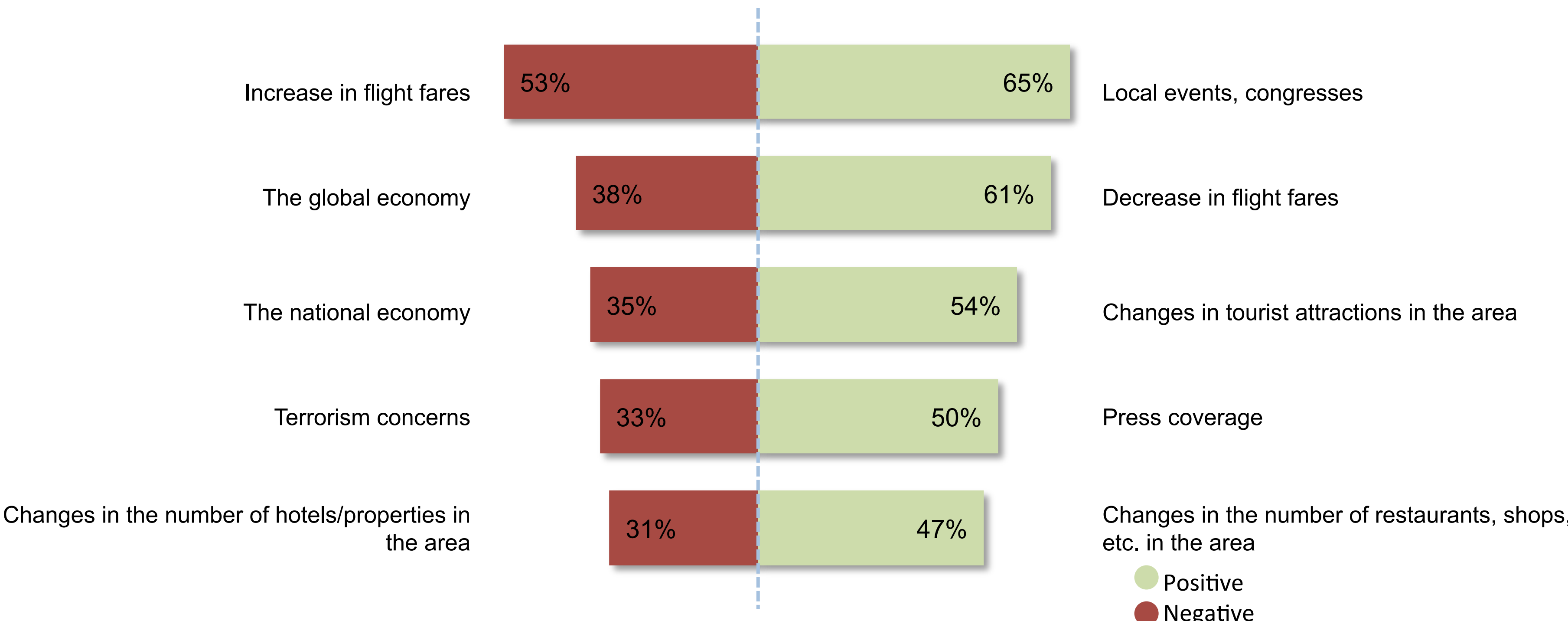


BQ20. How optimistic or pessimistic are you about your business profitability in 2016? Base: Global (10,756), Africa (620), Asia (1,309), Australasia (522), Europe (5,705), Middle East (88), N. America (1,173), S. America (1,521)

Local events and congresses will positively impact business profitability in 2016

- Flight fares are an important factor for business owners, who hope for price decreases
- Local elements, including events and changes in tourist attractions, are seen as having a positive impact on business profitability
- The economy, both global and national, are causes for concern amongst business owners

Positive vs. negative impact on business profitability



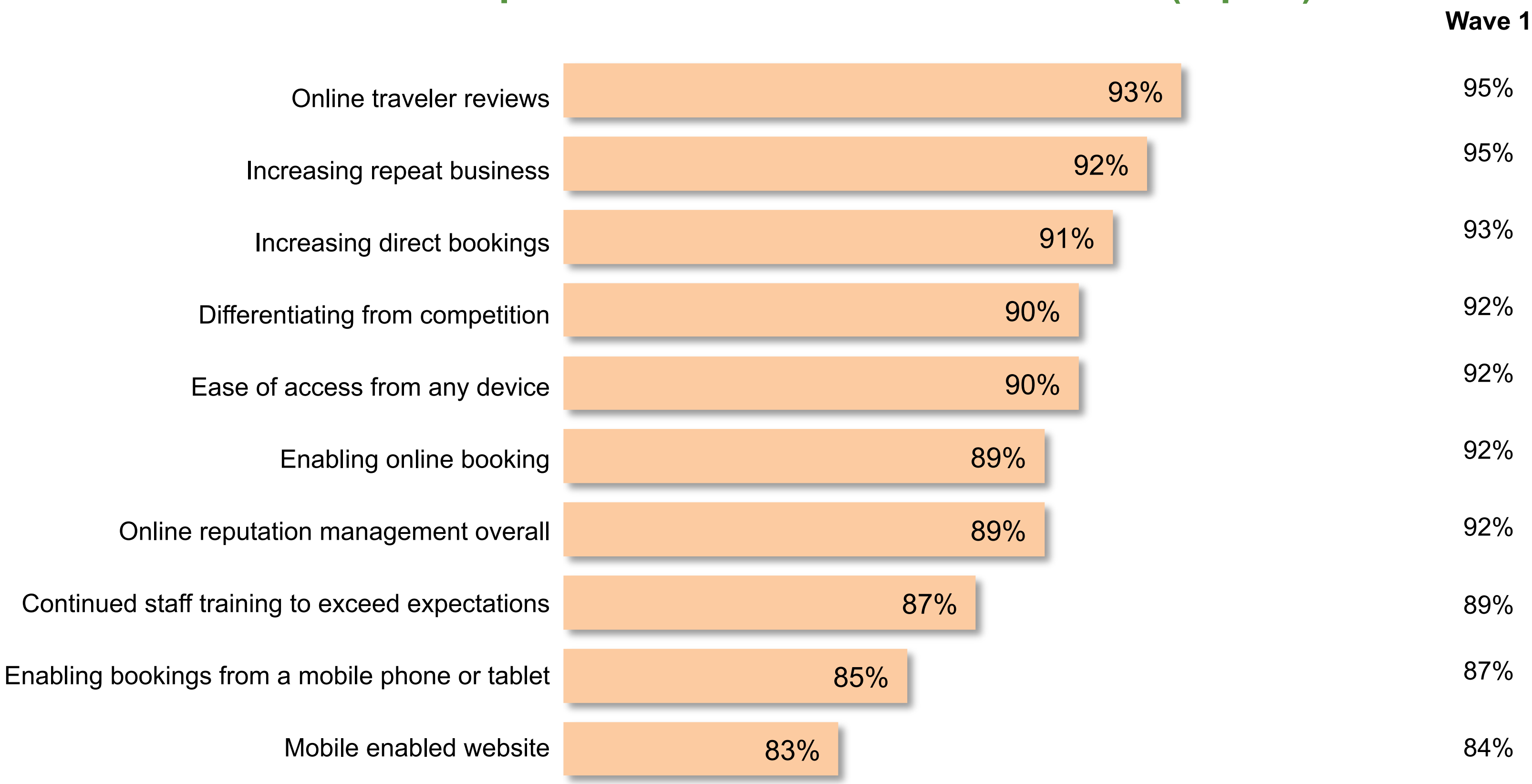
BQ21. Thinking about 2016, do you think any of the following will have a positive or negative impact on your business profitability? Base: All respondents (10,756)

LOOKING FORWARD: INVESTMENT

Online reviews and retaining customers are key for business owners

- The order of factors that hoteliers consider as important for the future of their business remains consistent with the last wave of TripBarometer

Importance to the future of business (top 10)

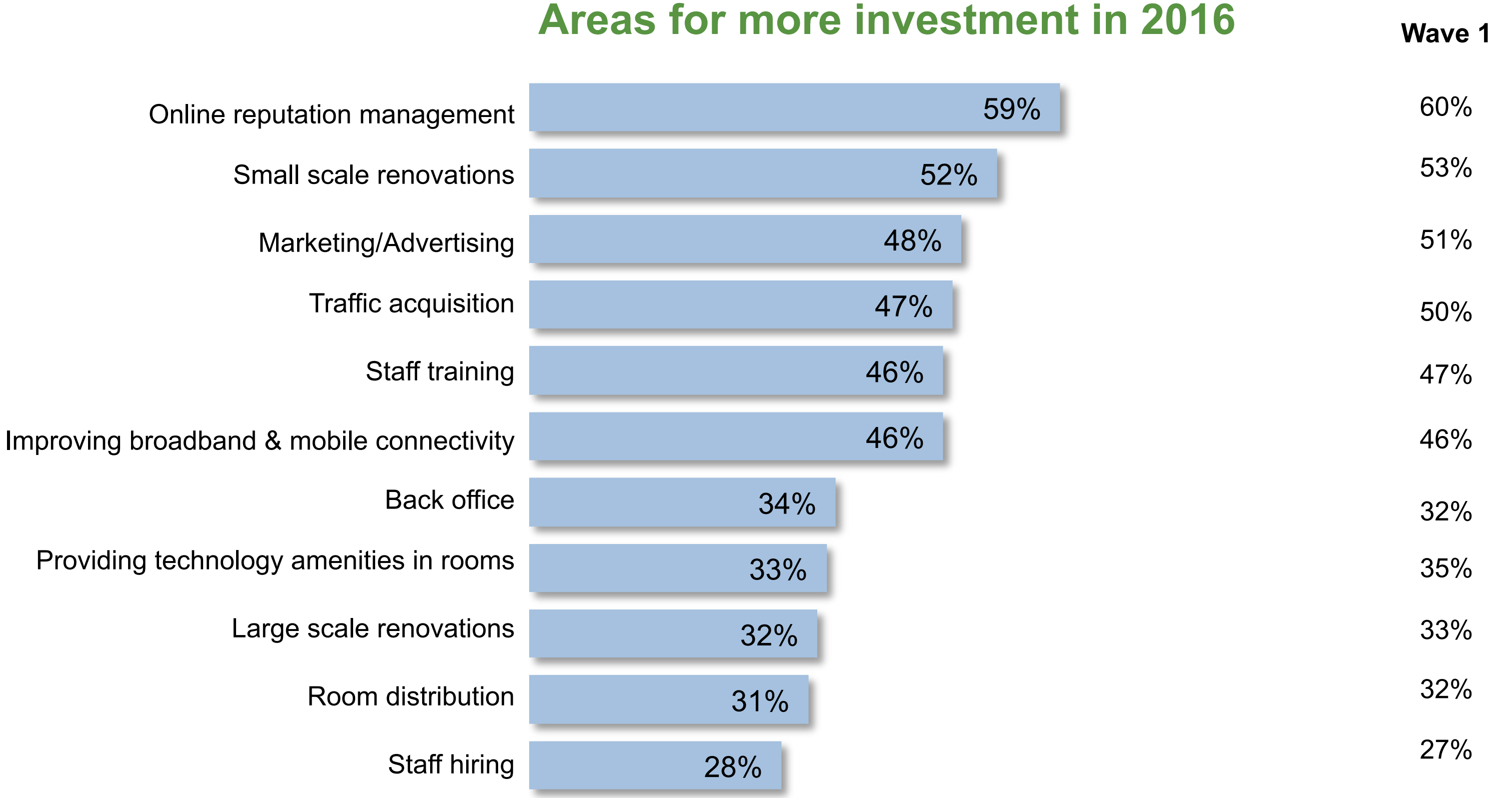


BQ16. How important do you think each of the following is for the future of your business? Base: All respondents (10,756)

Business owners continue to prioritise online reputation management in 2016

- Half of hoteliers' investments will go toward improving aspects of their accommodation as well as marketing activities next year
- Just over one-quarter of hoteliers will be hiring staff and nearly half plan to invest more in staff training

Areas for more investment in 2016



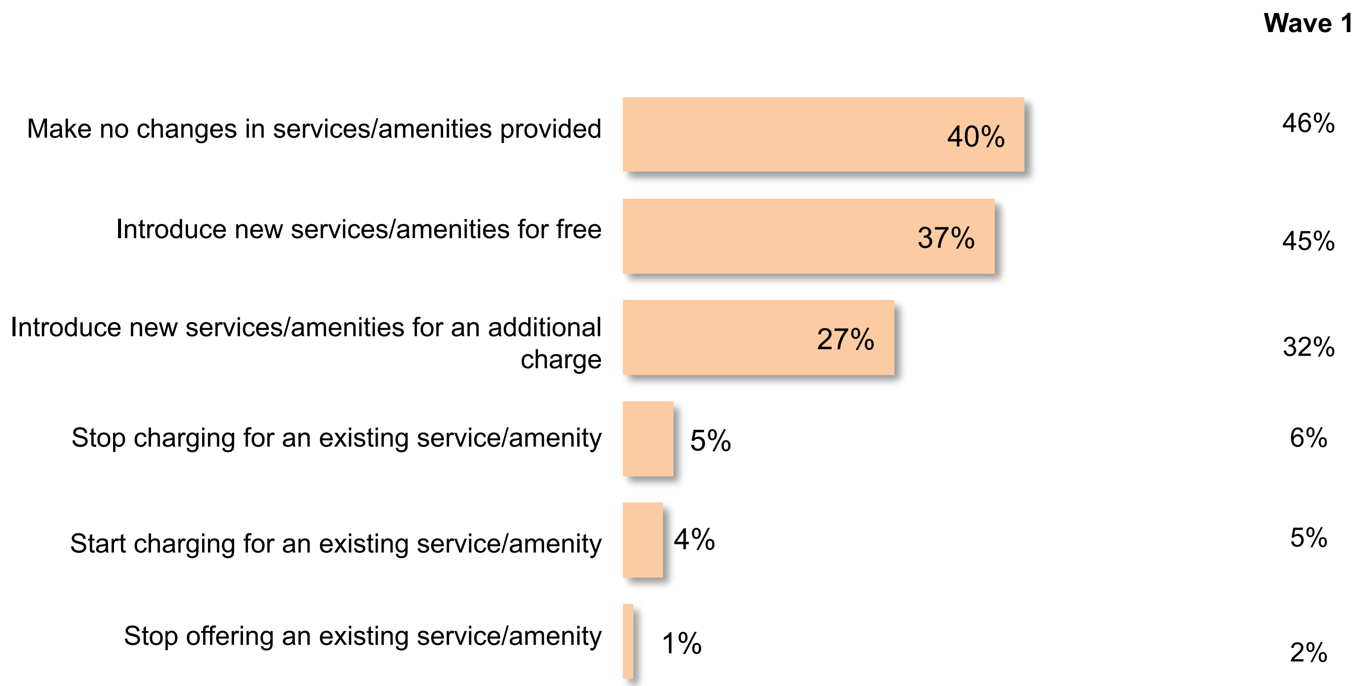
BQ17. Looking at 2016, are you planning to invest more, about the same or less in each of the following? Base: All respondents (10,756)

OFFERING AND AMENITIES

More than one-third of business owners will continue introducing new free services in 2016 (37%)

- Most business owners plan to make no changes to services and amenities provided
- A large number of hoteliers aim to introduce new amenities: over one-third will add for free and just over one-quarter will add for an additional charge

Accommodation plans in 2016



BQ10 Which of these statements best applies to your hotel(s)/accommodation in 2016? Base: All respondents (10,756)

Business owners plan to provide new services and amenities

- Business owners in many markets are differentiating themselves by offering new services and amenities
- Markets where these offerings are free are also likely to include new amenities for an additional cost

Top 10 adding new services for free

1.	**Brazil**	56%
2.	**Russia**	55%
3.	**India**	54%
4.	Thailand	47%
5.	**Portugal**	45%
6.	**Mexico**	44%
7.	**Indonesia**	44%
8.	Turkey	40%
9.	Italy	38%
10.	**Germany**	38%

Top 10 adding new services at an additional charge

1.	**Russia**	57%
2.	**Indonesia**	45%
3.	**India**	45%
4.	Switzerland	38%
5.	**Brazil**	38%
6.	**Portugal**	35%
7.	Morocco	33%
8.	**Germany**	32%
9.	Caribbean	32%
10.	**Mexico**	30%

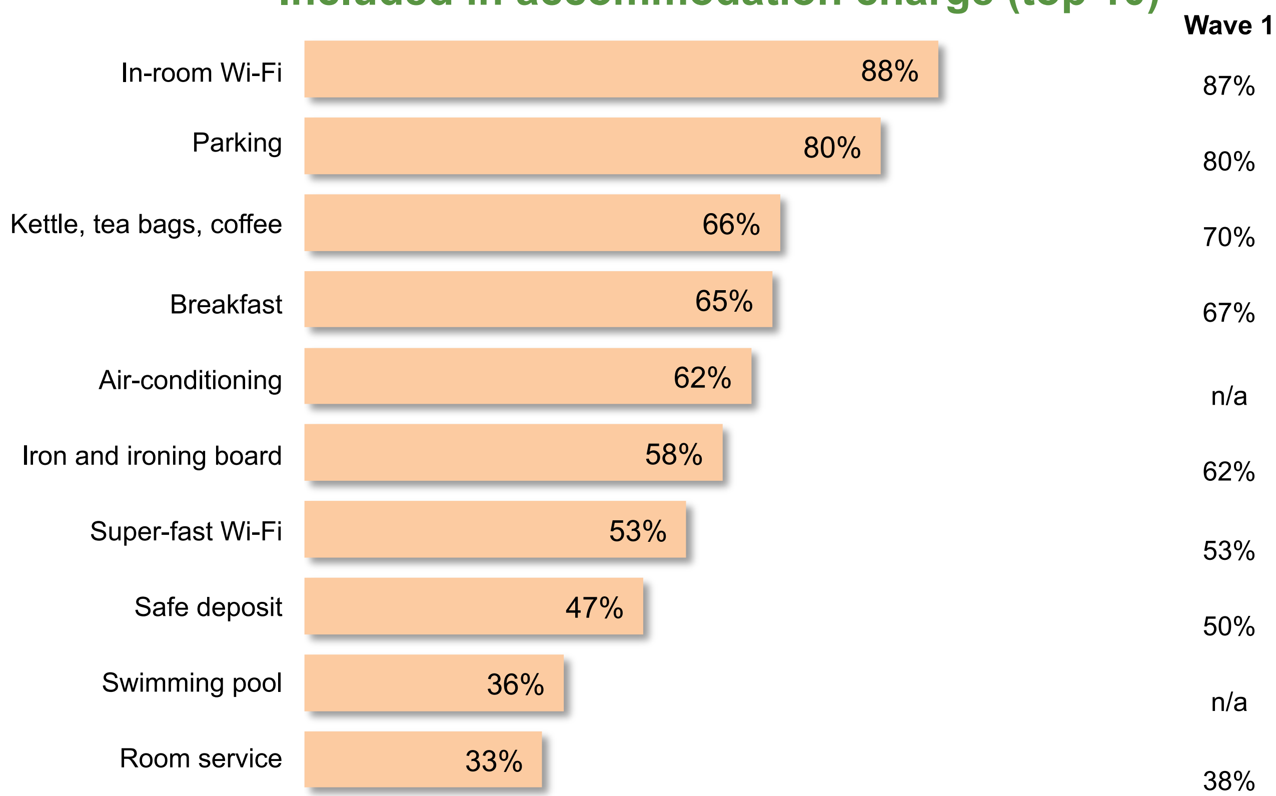
Markets in **bold** see hoteliers increasing their offering of free and paid-for amenities and services

BQ10 Which of these statements best applies to your hotel(s)/accommodation in 2016? Base: All respondents (10,756)

Almost nine in 10 business owners offer free in-room Wi-Fi

- Two-thirds of hotels globally offer guests an air-conditioned experience – however, whether or not a hotel has air-conditioning is the number one deal-breaker for travelers

Included in accommodation charge (top 10)

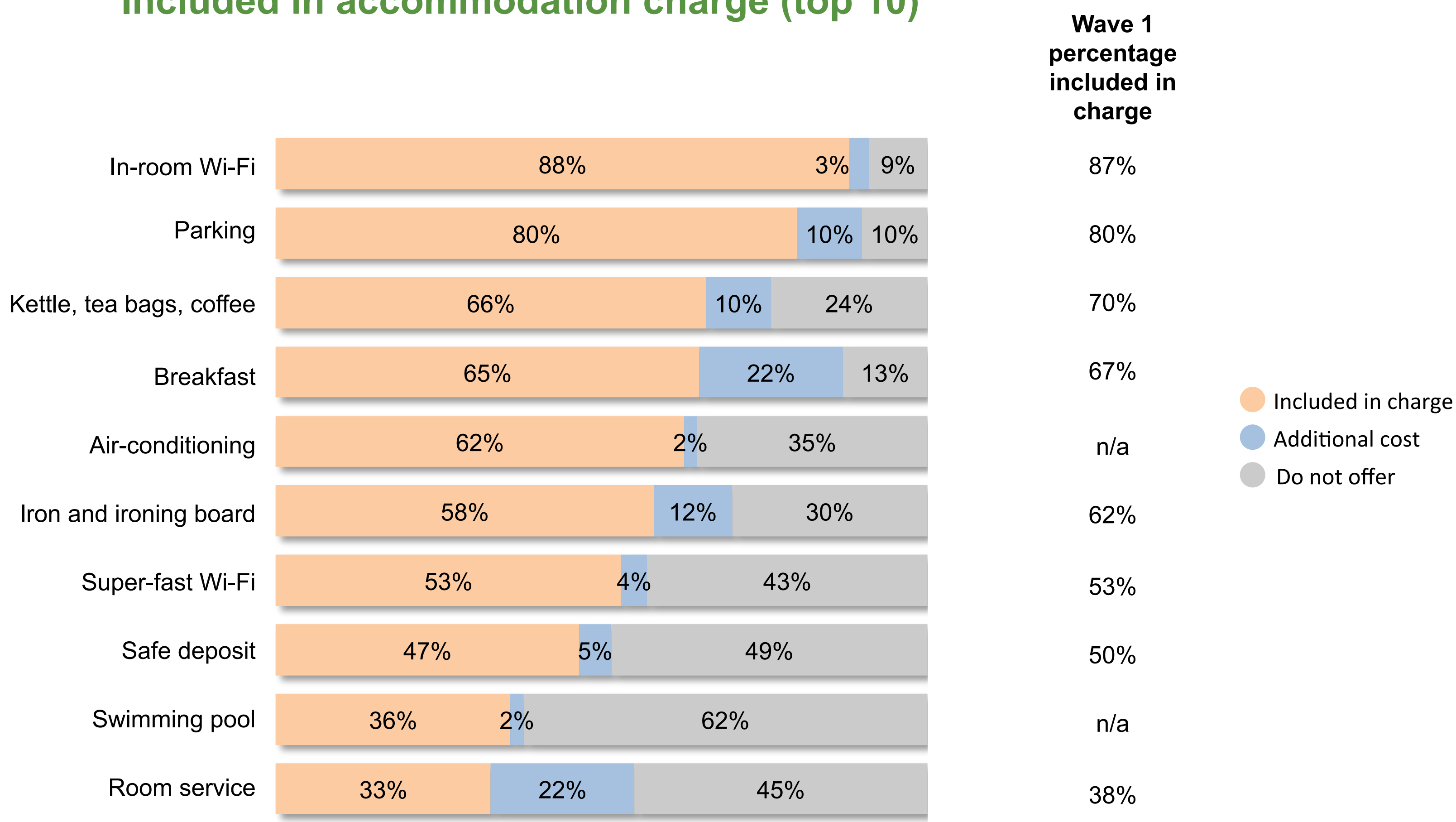


BQ7. Which of the following amenities or services are you currently offering as part of the room/accommodation charge, and which do you offer at an additional cost? Base: All respondents (10,756)

Hoteliers most likely to charge extra for dining services

- One-fifth of global hoteliers offer breakfast and room service at an additional cost

Included in accommodation charge (top 10)



BQ7. Which of the following amenities or services are you currently offering as part of the room/accommodation charge, and which do you offer at an additional cost? Base: All respondents (10,756)

Indonesian hoteliers are the most likely to include amenities in accommodation charge

- Indonesian hoteliers are also in the top 3 most likely to charge for additional amenities – this is no surprise as 45% said they will charge for new services added in 2016.
- Indian, Indonesian, Mexican, Thai and Turkish hoteliers could be seen as the most generous – all are in both top 10 lists to add new services for free and include amenities in price.

Top 10 most likely to include amenities in price

1. Indonesia
2. Turkey
3. South Africa
4. India
5. Thailand
6. United States
7. Mexico
8. Greece
9. Argentina
10. Caribbean

Top 10 most likely to charge for additional amenities

1. Morocco
2. Russia
3. Indonesia
4. Turkey
5. India
6. Thailand
7. Switzerland
8. Portugal
9. Germany
10. Caribbean

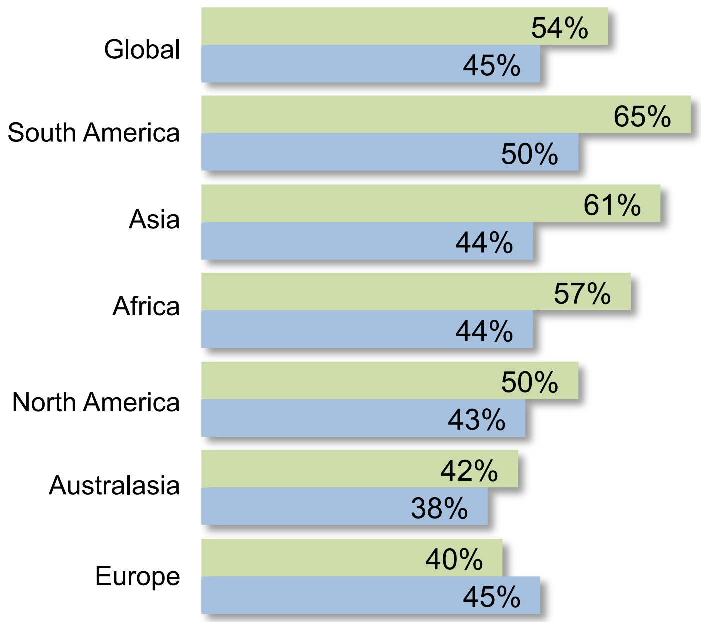
BQ7. Which of the following amenities or services are you currently offering as part of the room/accommodation charge, and which do you offer at an additional cost? Base: All respondents (10,756)

DEMAND VS. SUPPLY

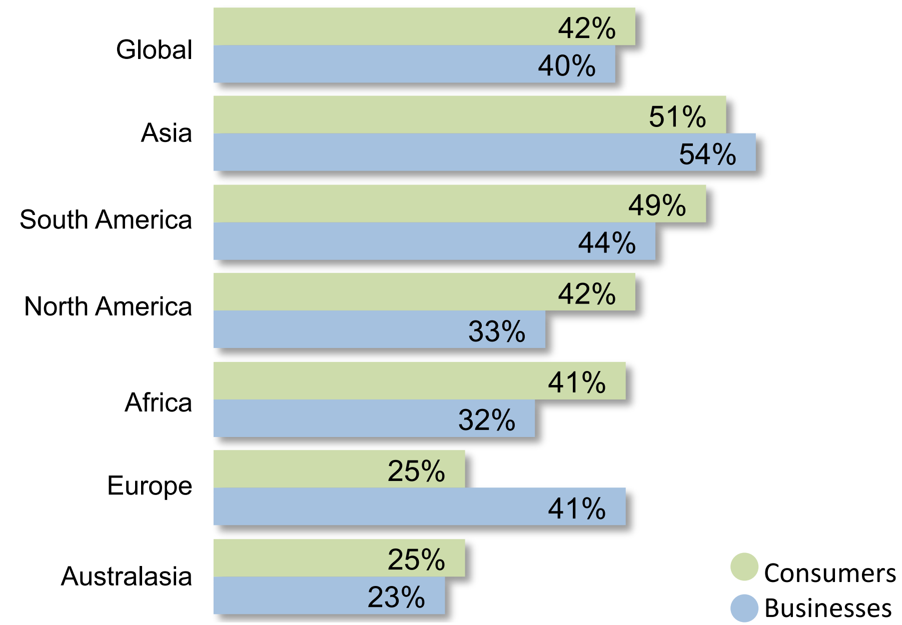
Business owners underestimate the importance of special offers and loyalty programs to guests

- Europe is the only region where business owners believe special offers are more important to guests than they actually are.
- 41% of European hoteliers believe loyalty programs are important to guests when deciding to book accommodation – only one-quarter of guests say loyalty programs are an important factor in their final decision.

Special Offers



Loyalty Programs

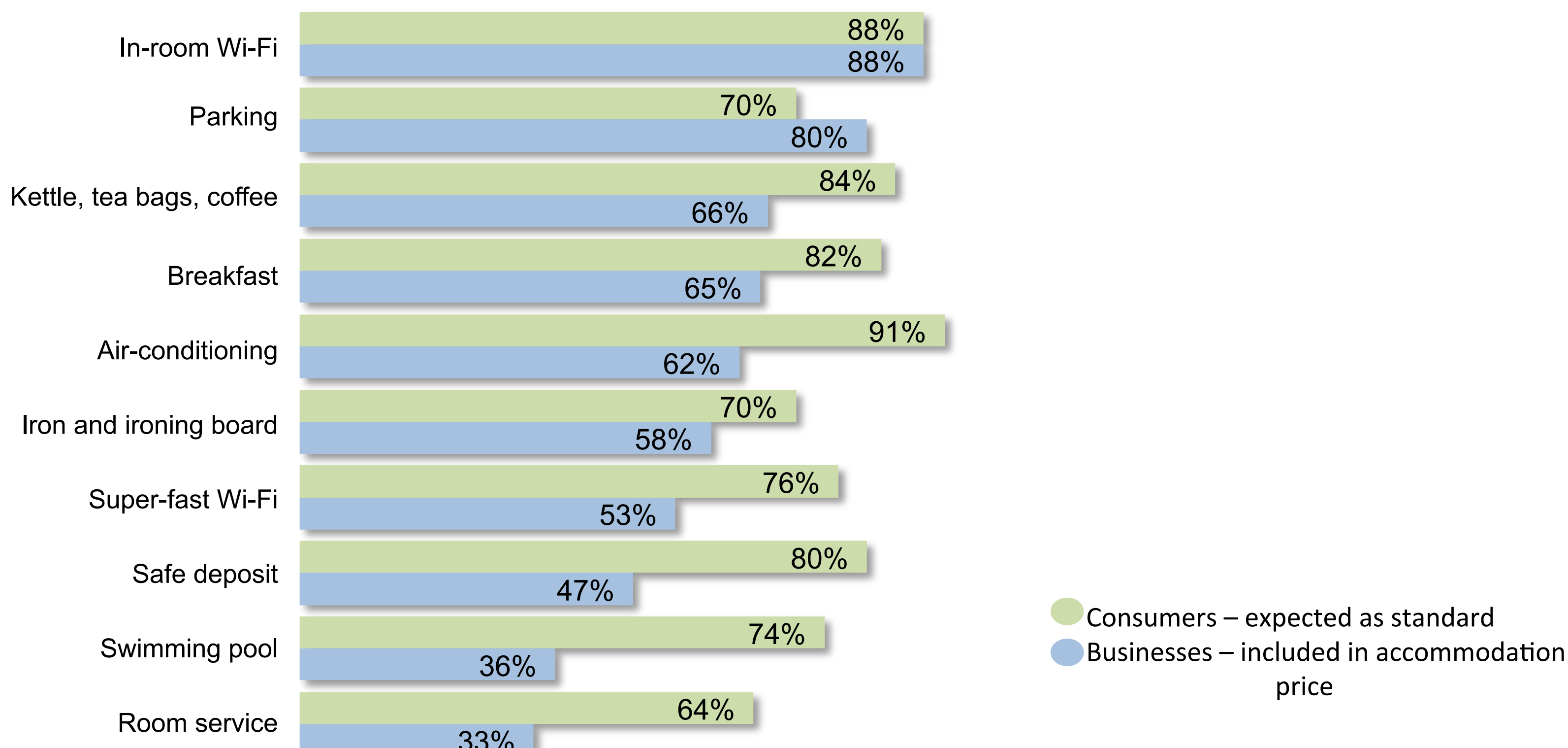


CQ12. Staying with your last holiday/vacation, how important were each of the following in your final decision to book your accommodation? Base: All consumer respondents (34.026); BQ12. How important do you think each of the following listed below are for guests when they're deciding to book your accommodation? Base: All business respondents (10,756)

Parking is the only area where consumers' expectations are exceeded by hoteliers' supply

- Travelers and hoteliers have the same score when looking at the provision of in-room Wi-Fi and the expectation that this will be included in the accommodation charge.
- Just over one-third of business owners include swimming facilities in accommodation charges whereas almost three-quarters of travelers expect this to be free

Included in accommodation charge vs. expected as standard



CQ13. Now thinking more generally about holidays/vacations, which of the statements below best apply for the amenities listed below? Base: all consumer respondents (34,026); BQ7. Which of the following amenities or services are you currently offering as part of the room/accommodation charge, and which do you offer at an additional cost? Base: all business respondents (10,756)

METHODOLOGY

TripBarometer was introduced by TripAdvisor in 2012, with the aim of measuring and tracking global travel industry trends amongst both business owners and consumers. Since 2014, Ipsos MORI has conducted this study, with this being Wave 6.

All interviews were conducted using the following online methodology:

- The **consumer** research was conducted in 32 markets via an online banner and pop-up link on TripAdvisor's local websites as well as an email invitation sent to TripAdvisor members. Ipsos' online panels were deployed to help boost sample sizes in some markets (please refer to the Appendix for details on sample size breakdown by markets).
- An email invitation was sent to accommodation **business owners** who use TripAdvisor's free services. A minimum of 150 completes were achieved in each priority market (with the exception of China, which achieved 71).

To keep in line with previous waves of TripBarometer, survey data was weighted to the known profile of the global online population. In addition, weighting was also applied at the country level.

- Consumer weighting: The data is weighted to represent the known online population within each country and also to represent the country's profile in terms of age, region and gender.
- Business weighting: Every country has been given an equal weight. Countries within the same region have been grouped together and given the same weight as an individual country.

Throughout this report, consumers are referred to as 'travelers' or 'consumers' and defined as those who chose to take part in our survey and have researched or planned vacations online in the last 12 months. 'Millennials' are participants who fall between the 18-34 age range; 'Generation X' are participants who fall between the 35-64 age range and 'Baby Boomers' are participants who are 65+ years old.

Businesses are referred to as ‘business owners’ or ‘hoteliers’ and are defined as those who chose to take part in our survey and were in one of the following positions/roles:

- Owner, manager, director, general manager, vice president, president
- Day-to-day management of the business, marketing, sales, commercial

In some places, we have referenced data from the previous wave of this survey, Wave 1 2015. Although we did conduct a consumer survey in January 2015, we are unable to provide comparisons against this work as we used a different mix of recruitment methods. This wave we invited participation using online pop-ups, banners on the TripAdvisor site and a banner on the TripAdvisor members’ email. Last wave we invited participation using pop-up invitations on the TripAdvisor site. Although both approaches are focused on TripAdvisor users, the introduction of the TripAdvisor members’ email provides access to a more highly engaged TripAdvisor user which could have an impact on answers. Therefore, although both sets of results are valid, we cannot draw robust comparisons between them.

Throughout the report we use some headlines or NET codes to group together responses from different answer codes that feed into similar themes. The net code totals will not reflect the sum of the various codes included within them, as a single respondent may have answered all of the codes within the theme but will only be counted once. This is because the codes are designed to reflect the impact of that particular theme on the travel population and we do not want to double count respondents as this would overplay the importance among the total population.

In this report, no data with a base size below 100 is reported unless specified.

Fieldwork was conducted between October 14th - 29th, 2015.

Consumer survey sample size: Total of 34,016 respondents

Total (34,026)	Country of Residence	Interviews
Africa (747)	Morocco	20
	South Africa	629
	Other Africa	98
Asia (4,708)	China	597
	India	564
	Indonesia	476
	Japan	1326
	Malaysia	512
	Thailand	403
	Other Asia	830
Europe (16,080)	Austria	242
	France	1674
	Germany	1005
	Greece	490
	Ireland	378
	Italy	3316
	Portugal	296
	Russia	1961
	Spain	1505
	Switzerland	319
	Turkey	431
	United Kingdom	3195
	Other Europe	1268

Region	Country of Residence	Interviews
Middle East (387)	Egypt	25
	Israel	144
	Jordan	7
	United Arab Emirates	95
	Other Middle East	116
N. America (5,844)	Canada	1341
	Caribbean	75
	United States	4428
S. America (4,712)	Argentina	1417
	Brazil	2107
	Mexico	471
	Other South America	717
Australasia (1,548)	Australia	1068
	New Zealand	480

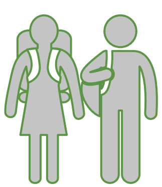
Consumer survey sample size by demographic

Demographic	Sub-groups	Interviews
Generation* (34,026)	Millennials	9,373
	Generation X	21,099
	Baby Boomer	3,554
Gender (34,026)	Male	15,048
	Female	18,897

Demographic	Sub-groups	Interviews
Age (34,026)	18-24	2,210
	25-34	7,163
	35-49	10,216
	50-64	10,883
	65+	3,554

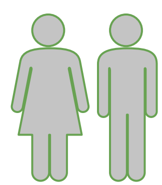
Generations definitions

***These definitions have been altered slightly since W1 2015**



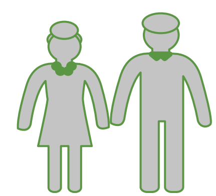
18-34 years of age

Millennials



35-64 years old

Generation X



65+ years of age

Baby Boomers

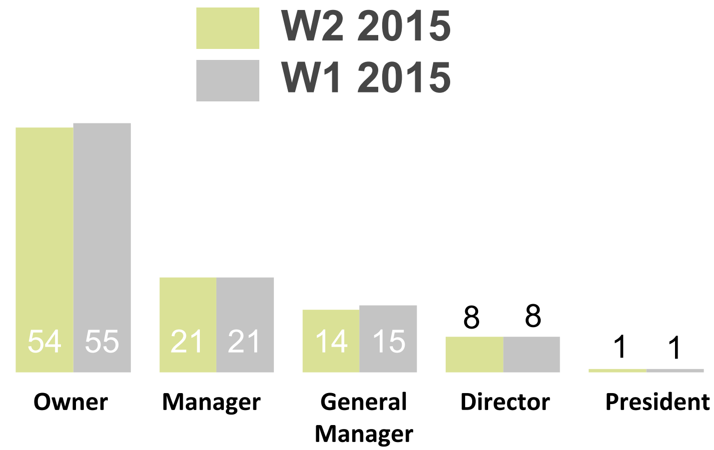
Business survey sample size: Total of 10,756 respondents

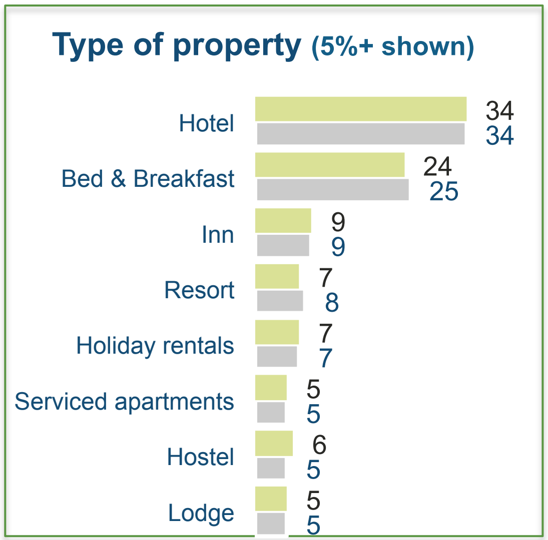
Total (10,756)	Country of Residence	Interviews
Africa (620)	Morocco	134
	South Africa	293
	Other Africa	202
Asia (1,309)	China	71
	India	337
	Indonesia	159
	Japan	175
	Malaysia	40
	Thailand	217
	Other Asia	376
Europe (5,705)	Austria	129
	France	1056
	Germany	266
	Greece	421
	Ireland	72
	Italy	1569
	Portugal	139
	Russia	249
	Spain	580
	Switzerland	100
	Turkey	176
	United Kingdom	533
	Other Europe	648

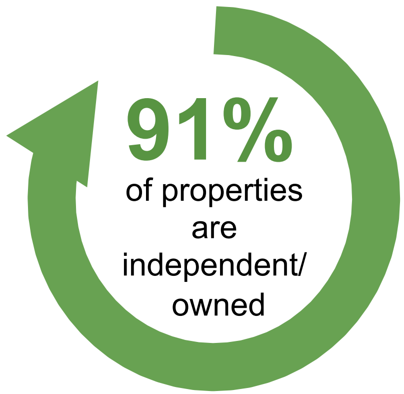
Region	Country of Residence	Interviews
Middle East (88)	Egypt	24
	Israel	21
	Jordan	10
	United Arab Emirates	18
	Other Middle East	30
N. America (1,173)	Canada	305
	Caribbean	141
	United States	749
S. America (1,521)	Argentina	280
	Brazil	404
	Mexico	242
	Other South America	623
Australasia (522)	Australia	343
	New Zealand	187

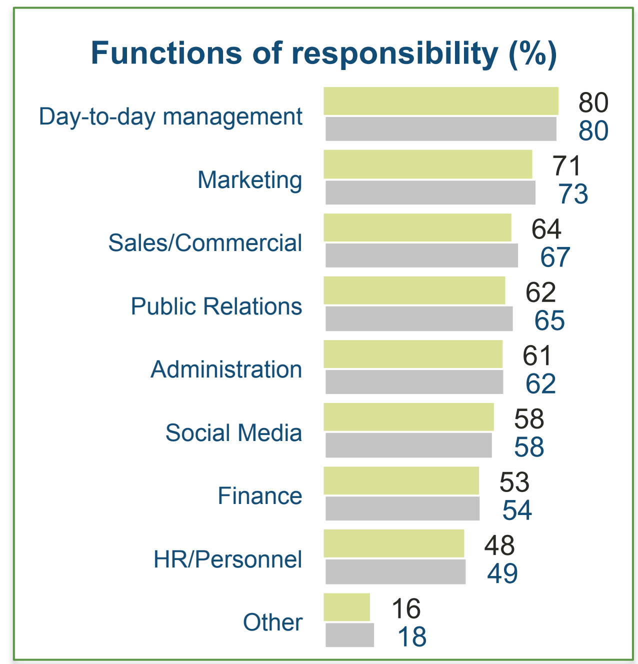
82% single property businesses (82% in Wave 1)

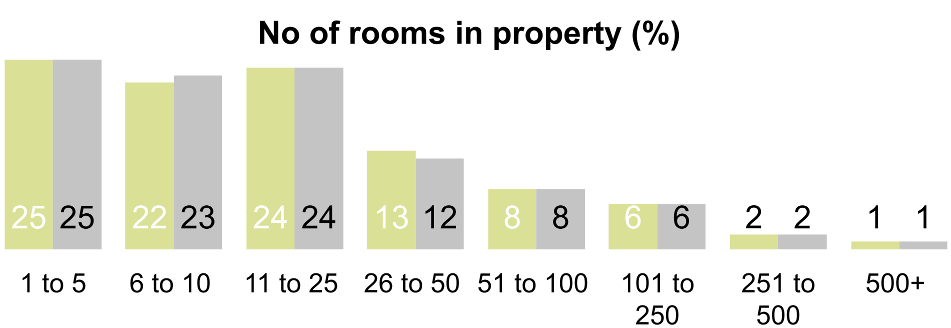
50% in mid-range category (50% in Wave 1)











Business survey sample size by property type, participant position

Property information	Sub-groups	Interviews
Number of properties (10,756)	Single Property	8,832
	Multiple Property	1,924
Property Type (10,756)	Inn/B&B	4,194
	Hotel	3,708
	Self catered accommodation	1,751
	Resort	758
	Hostel	599
	Motel	331
	Camping	217
	Cruise ship	5

Respondent information	Sub-groups	Interviews
Position (10,756)	Owner	6,004
	Manager	2,293
	General Manager	1,472
	Director	813
	President	146
	Vice President	28

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