



Worldwide Travel Path to Purchase 2017

Analysis Based on April - September 2017 Data Periods



Study Design



Included In Study

- Any comScore panel members with:
- **1+ travel searches** AND/OR **1+ travel site visits**
 - Anytime from April to September 2017



Segments Examined

- All travel-related behaviour tracked & segments broken out by:
- **TripAdvisor:** “TripAdvisor Visitors” vs. “Non-TA Visitors”
 - **Transactors:** “Only Researched” vs. “Made Online Purchase”



Time Alignment Applied

- All users’ time aligned so that Day 1 is first day of every research length
- Allows us to measure differences in average research and purchase length



Transactional Sites Included

Over 325+ transactional travel sites included, including most major sites for Hotels, Airlines, OTAs and Car Rental



Overview of Findings



Overview of Worldwide Findings

Summary of size and reach



Largest

TripAdvisor is the **largest travel property worldwide** with **324M users** accessing the site via any platform in July 2017



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**

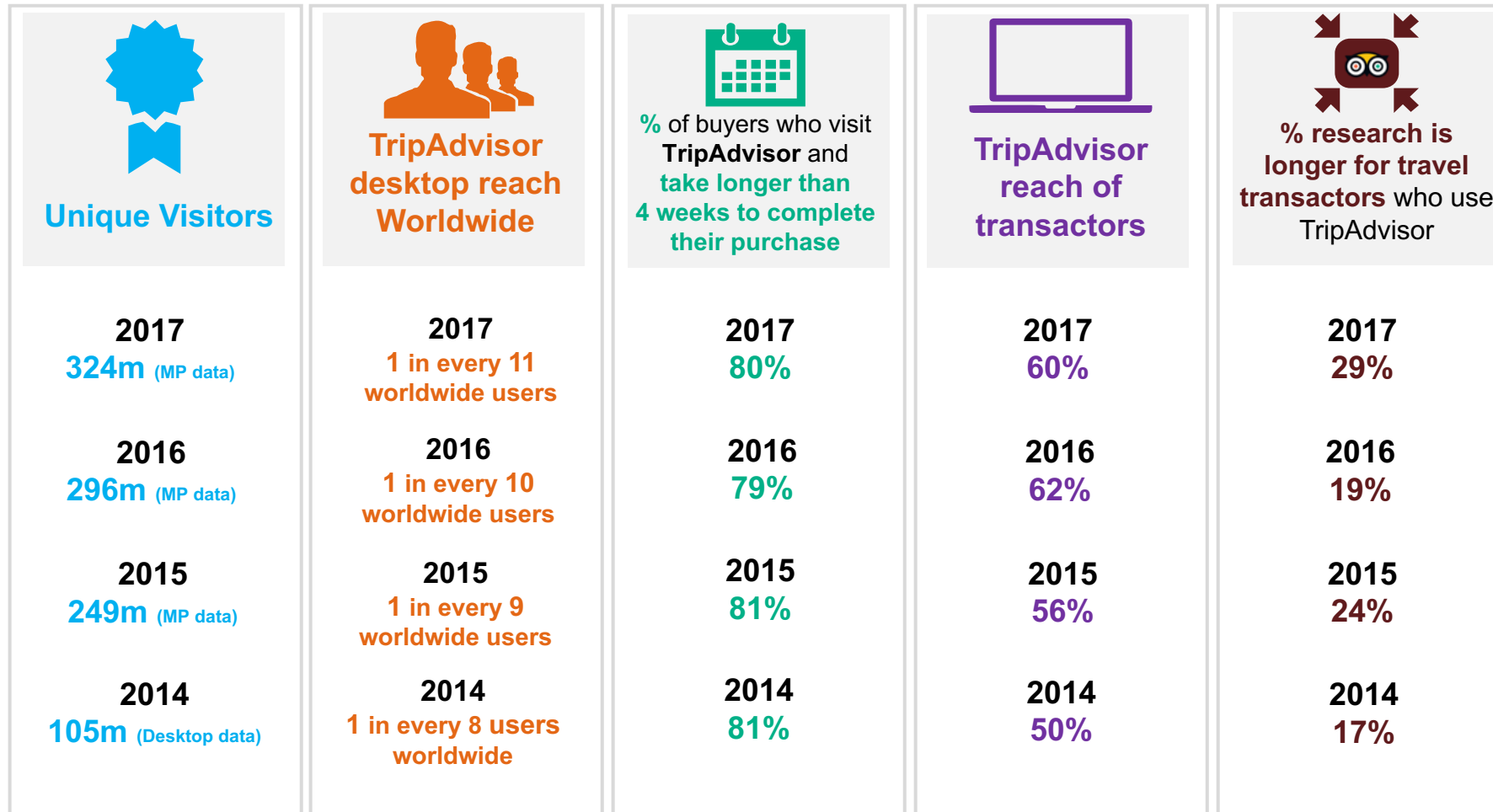


Engagement

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

Overview of Worldwide Findings

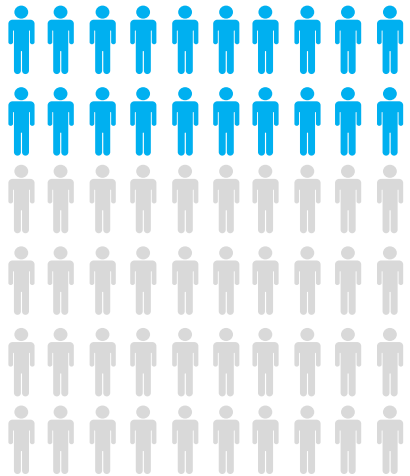
4 Year Comparison



TripAdvisor's Share of Travel Bookers

33%

of people worldwide visit travel sites



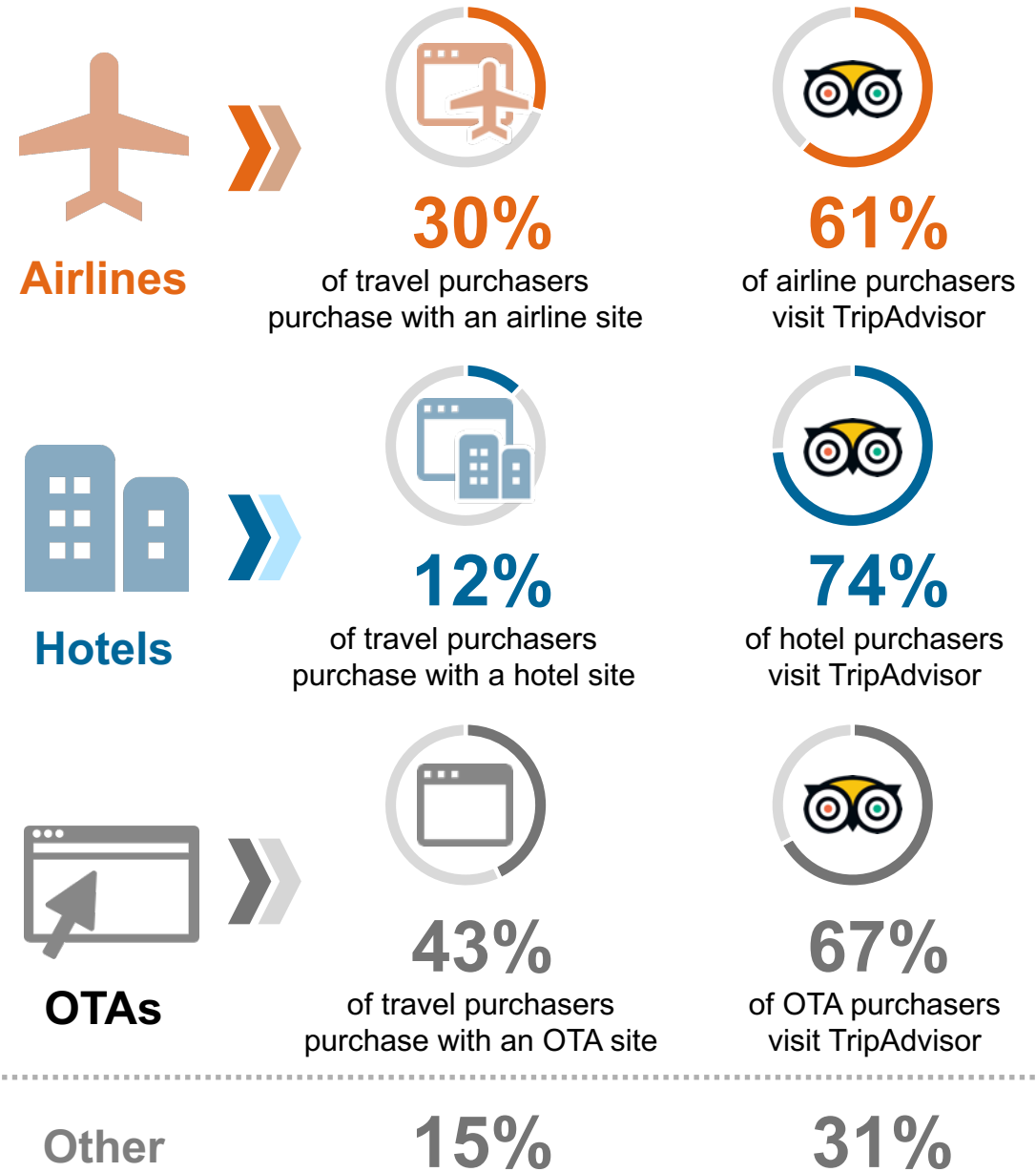
21%

of intenders end up purchasing



Source: comScore services

Worldwide Market



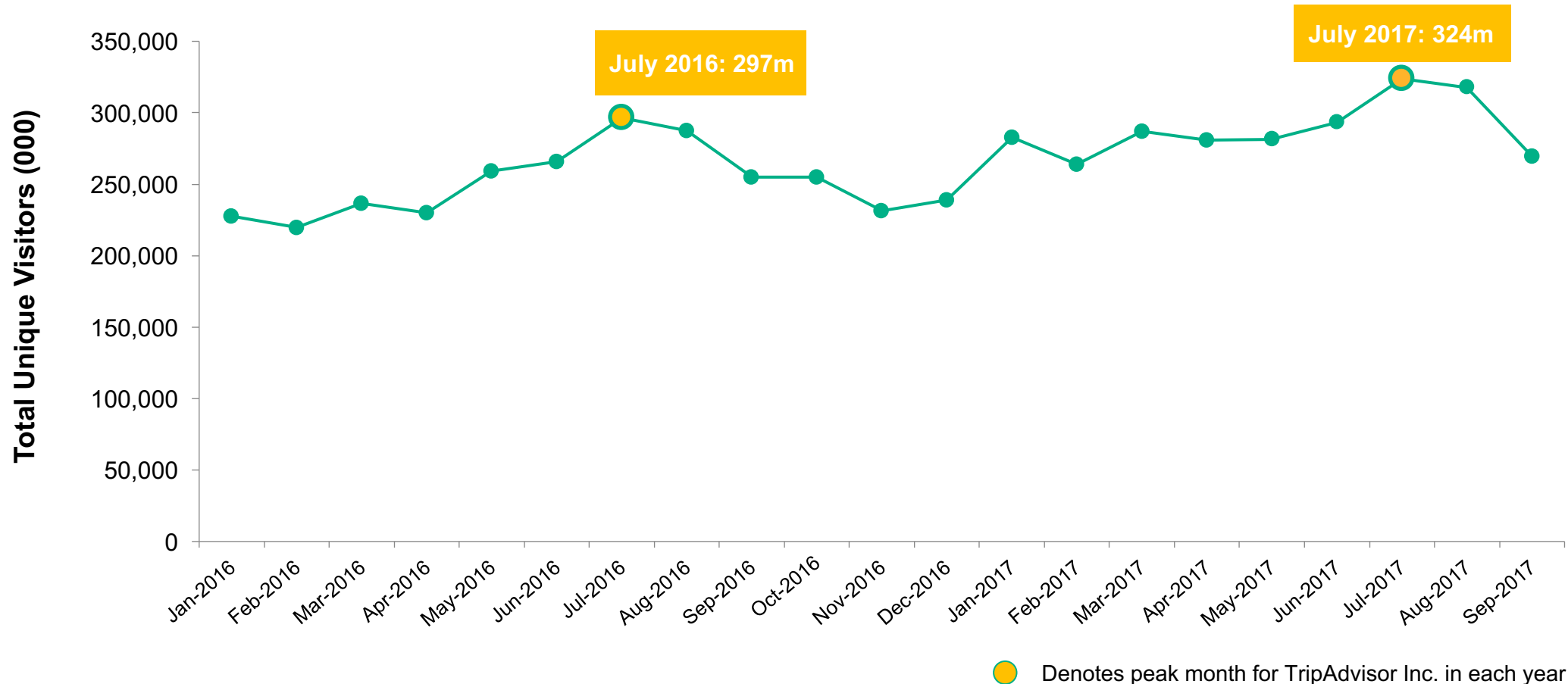


Setting the scene



TripAdvisor Overview - Worldwide

TripAdvisor's WW audience peaked in July 2017 at 324m





Summary of Research



Typical Research – OTA Purchase

Expedia.ca Purchase in 54 Days



VISITS

Tripadvisor.ca
Transat.com
Airtransat.com
Reviewpro.com
Cntraveler.com
Sirenishotels.com
Viator.com
Tripadvisor.ca

Sirenishotels.com
Reviewpro.com
Tripadvisor.ca
Fodors.com
Tripadvisor.ca
Locogringo.com
Aeroplan.com
Airtransat.com
Transat.com

Tripping.com
Rci.com
Cntraveler.com
Booking.com
Bookingbuddy.eu
Airbnb.ca
Aeroplan.com
Rcitravel.com
Tripadvisor.ca
Tourismtofino.com
Cohoferry.com
Tripadvisor.ca
Cheapoair.ca
Bcferries.com
Hotwire.com
Tripadvisor.ca

Flighthub.com
Airbnb.ca
Tripadvisor.ca
Aeroplan.com
Sunwing.ca
Tripadvisor.ca
Hotwire.com
Trivago.com
Expedia.ca
Hotels.com
Tripadvisor.ca

Priceline.com
Tripadvisor.ca
Expedia.ca
Airbnb.ca
Hotelscombined.ca
Bookingbuddy.com
Tripadvisor.ca
Trivago.com
Hellobc.com
Hotwire.com

Hotels.com
Booking.com
Expedia.ca
Trivago.ca
Tripadvisor.ca
Airbnb.ca
Rci.com

Tripadvisor.ca
Selloffvacations.com
Expedia.ca
Tripadvisor.ca
Airbnb.ca
Bcferries.com
Revelstokemountainresort.com
Tripadvisor.ca
Aircanada.com
Worldweb.com
Turkey-visit.com
Albertaparks.ca
Quebecoriginal.com
Cheapoair.ca
Tripadvisor.ca
Wyndhamhotels.com



DAY -54

DAY -47

DAY -30

DAY -15

DAY -9

Booking Day

Post-Booking

**“Mountain biking
playa del carmen”
(Search)**
“Jungle bike tours playa del carmen, q.r., mexico”
“Tours riviera maya mexico”
“Grand sirenis”
“Mountain biking cozumel”

“Grand sirenis riviera maya”
“What to pack for mexico”
“Best cab drivers in riviera maya”
“Where to get pesos in mexico”
“Coba ruins admission price”

“Airbnb”
“Bc ferry”
“Where to stay around horseshoe bay terminal”
“Can you take a ferry from vancouver to seattle”
“Cheapoair”

“Flighthub”
“Things to do around court”
“Best hotels in red deer”
“Red deer hotels”
“Days inn - red deer deer, ab”

“Airbnb”
“Lethbridge cinema”

“Vancouver Airbnb”
“Trivago”
“Trivago Canada”

“Airbnb”
“Sutton place hotel revelstoke mountain resort”
“Vancouver island map”
“Where are the fireworks in revelstoke”
“Mx/cancun”
“Us/nevada/cancun-resort-las-vegas-by-diamond-resorts”
“Air canada flight status”
“Alberta parks”
“Millbrook Ontario”
“Lethbridge to toronto flights”



SEARCHES

Typical Research – Airlines Purchase

Easyjet.com Purchase in 53 Days



VISITS

Kuoni.co.uk
Firstchoice.co.uk
Travelzoo.com
Lonelyplanet.com
Tripadvisor.co.uk
Onthebeach.co.uk
Tripadvisor.co.uk
Ryanair.com
Easyjet.com
Haven.com

Blueseaholidays.co.uk
Lonelyplanet.com
Travelzoo.com
Secretescapes.com
Skyscanner.net
Lastminute.com
Easyjet.com
Trivago.co.uk
Expedia.co.uk

Lonelyplanet.com
Ryanair.com
Ferryto.eu
Tripadvisor.co.uk
Stenaline.co.uk
Booking.com
Portmarnock.com
Tripadvisor.co.uk
Priceline.com

Directline-flights.co.uk
Cheapflights.co.uk
Tripadvisor.co.uk
Easyjet.com
Travelzoo.com
Tripadvisor.co.uk
Hotels.com
Trivago.co.uk
Booking.com
Britishairways.com
Bookit.com
Secretescapes.com
Expedia.co.uk
Thomascook.com
Sykescottages.co.uk
Tripadvisor.co.uk
Holidaycottages.co.uk

Expedia.co.uk
Travelzoo.com
Booking.com
Hotels.com
Tripadvisor.co.uk
Skyscanner.net
Cheapflights.co.uk
Tripadvisor.co.uk
Travelsupermarket.com
Momondo.com
Liligo.co.uk
Trivago.co.uk
Tripadvisor.co.uk
Hotelscombined.co.uk
Lonelyplanet.com
Agoda.com
Tripadvisor.co.uk

Booking.com
Tripadvisor.co.uk
Lonelyplanet.com
Booking.com
Cheapflights.co.uk
Easyjet.com
Tripadvisor.co.uk
Expedia.co.uk
Edreams.co.uk
Hotelscombined.co.uk
Flybe.com
Skyscanner.net

Priceline.com
Booking.com
Easyjet.com
Tripadvisor.co.uk
Lonelyplanet.com
Travelzoo.com
Rome2Rio.com
Firstchoice.co.uk
Laterooms.com
Tripadvisor.co.uk
Hotelscombined.co.uk
Bookingbuddy.com
Expedia.co.uk
Trivago.co.uk
Lastminute.com
Secretescapes.com
Skyscanner.net



DAY -53

DAY -36

DAY -23

DAY -15

DAY -6

Booking Day

Post-Booking

“Flights from Edinburgh” (Search)
“Easyjet”

“Last Minute”
“Blackhorse Road Tf”
“Easyjet”
“Harrow on the Hill station”

“London Underground”
“Booking”
“Stranraer To Belfast Ferry”
“Portmarnock Links Hotel”
“Where Is New Grange In Ireland”
“Ferry To Ireland”

“Cancun Mexico”
“Ibiza Hotels”
“Secret Escapes”
“Castle Lodge Bed & Breakfast Malahide Dublin”
“Caravan Holidays In Scotland”
“Tripadvisor UK”
“Airbnb UK”
“Family Holidays Cumbria”
“Wemyss Bay Caravan Park”
“Self Catering Cumbria Lake District”

“Southernness”
“Caravan Parks St Andrews”
“Craigtoun Meadows Holiday Park, St Andrews”
“Seton Sands”
“Cairnsmill Caravan Park St Andrews”
“Family Caravan Parks West Coast Scotland”
“Haggerston Castle”
“Haven Holidays”

“Easyjet UK”
“Flybe”
“Dog Friendly Hotels In Loch Lomond Area”
“Belfast International Airport”

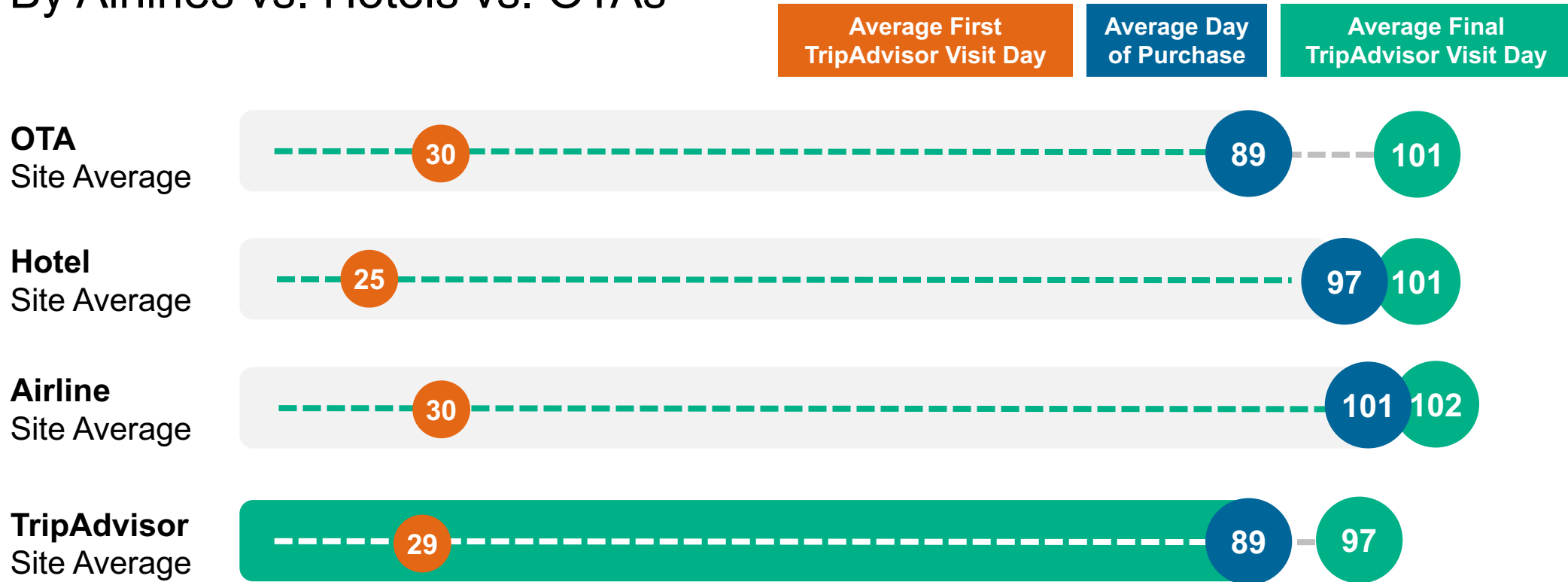
“Kings Cross To Aberdeen”
“Ibiza Flight And Hotel”
“Secret Escapes”
“Amsterdam, Netherlands”
“Lastminute”
“Edinburgh Airport”
“Hotel Du Vin Glasgow”
“Troon To Campbeltown Ferry”
“Cally Palace Hotel”
“Thomas Cook Holidays”
“Gran Tacande Hotel”
“Winter Weather Destinations In Europe”



SEARCHES

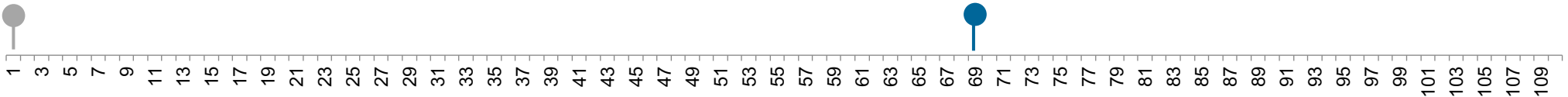
Research Summary

By Airlines vs. Hotels vs. OTAs



Day 1 User makes 1st travel website visit

Day 69 Non-TripAdvisor User Average Booking



Aggregated Worldwide Travel Paths

Travel buyers who use TripAdvisor are considerably more active during the path to purchase versus buyers who don't use TripAdvisor



Page Views
+225%

182 Pages
per TripAdvisor Users
37 of these on TripAdvisor



56 Pages
per Non-TripAdvisor Users



Total Visits
+240%

34 Visits
per TripAdvisor Users
3.2 of these on TripAdvisor



10 Visits
per Non-TripAdvisor Users



Total Minutes
+257%

164 min
per TripAdvisor Users
42 of these on TripAdvisor



46 min
per Non-TripAdvisor Users



Searches
+186%

40
per TripAdvisor Users



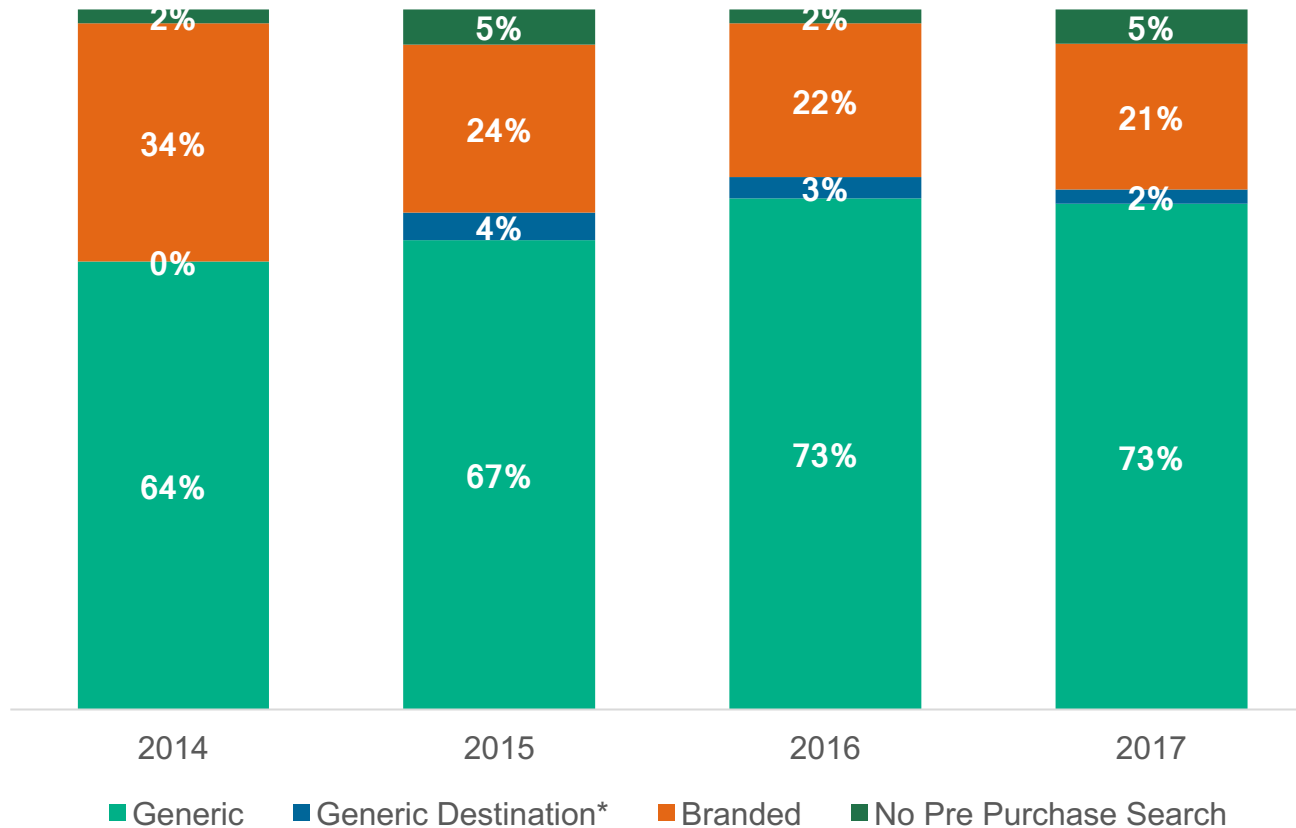
14
per Non-TripAdvisor Users

TripAdvisor Research – Worldwide

Distribution of Research Length for TripAdvisor Interactors by Week



First Search Analysis Shows Brand Opportunity



Keyword Examples used by travel searchers:

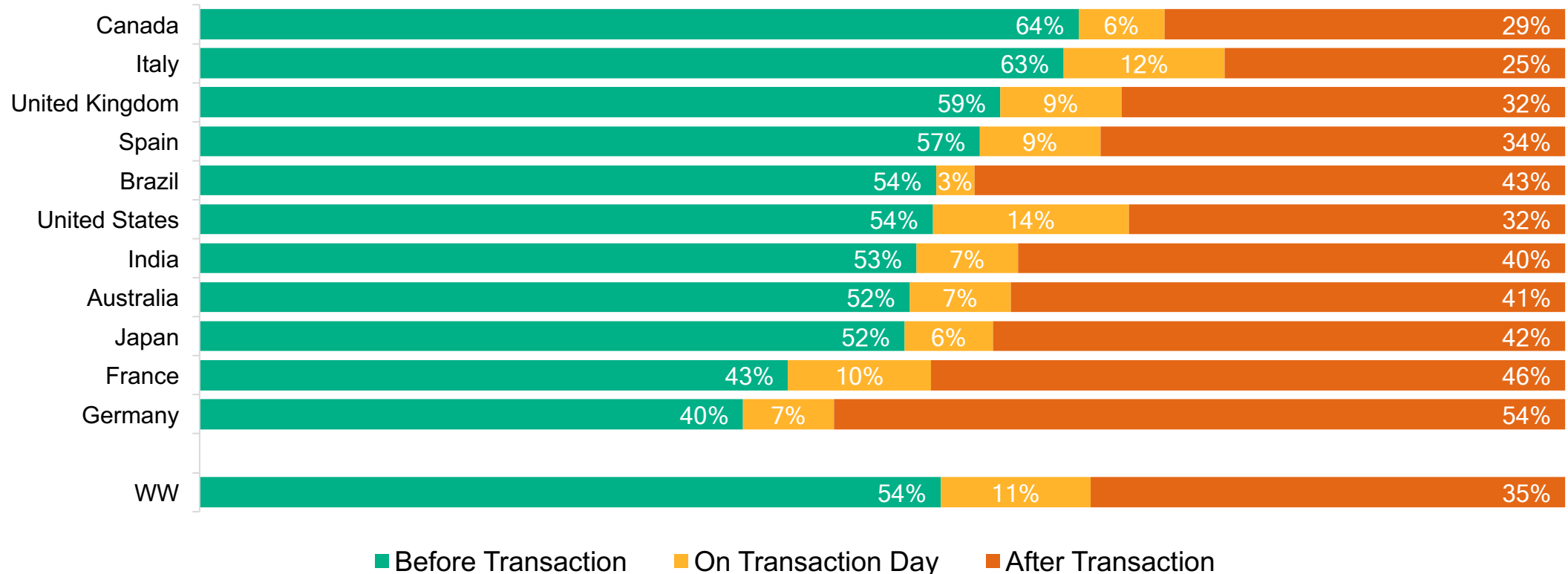
- Generic: **“Vacation Packages”**, **“Cheap Holidays 2017”**
- Generic destination: **“New Zealand Adventure Tours”**, **“4 day breaks to Iceland”**

73% of all first searches worldwide in 2017 are generic with 2% adding a destination

Airline Transactors: When do they visit TripAdvisor?

- Worldwide, 54% of airline transactors visit TripAdvisor before the airline purchase
- Canada has the highest proportion of airline transactors who visit before the purchase day
- In Germany, 54% of TripAdvisor visitors visit after their airline transaction

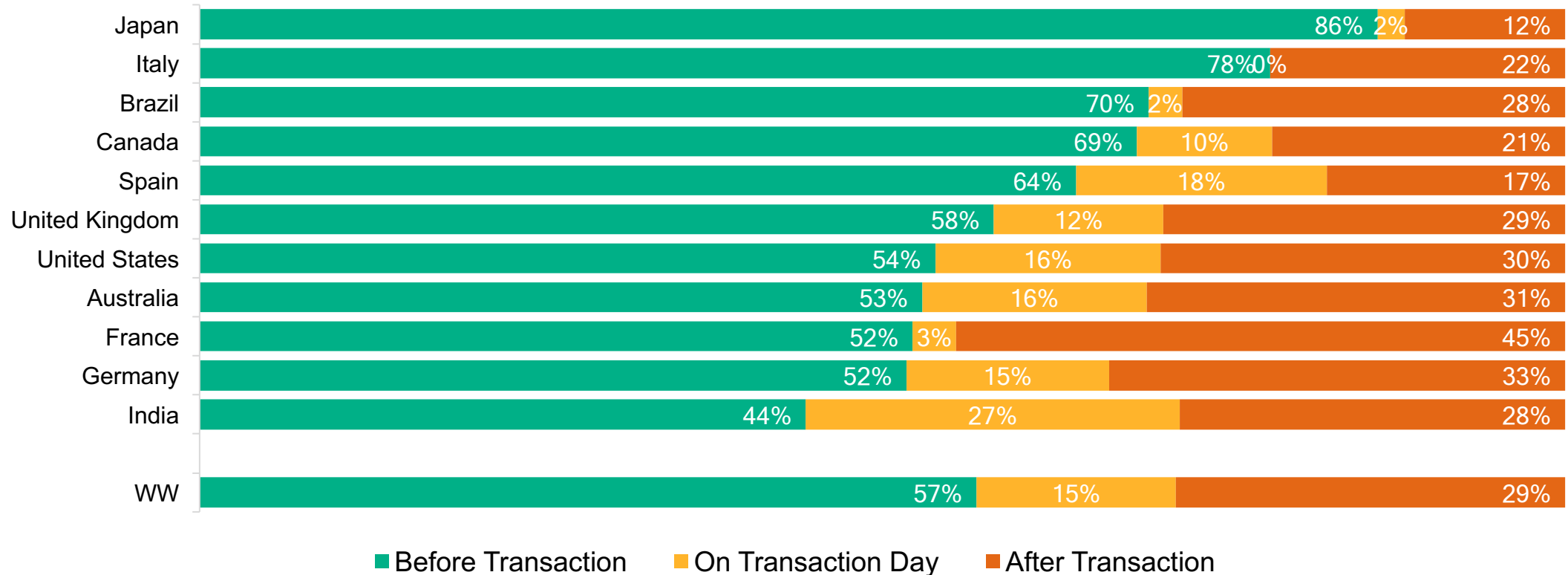
First TripAdvisor Visit



Hotel Transactors: When do they visit TripAdvisor?

- Worldwide, 57% of hotel transactors visit TripAdvisor before their purchase
- Over ¼ of India transactors make their 1st visit TripAdvisor on the day they make a purchase
- 45% of transactors in France first visit TripAdvisor after they have made a purchase

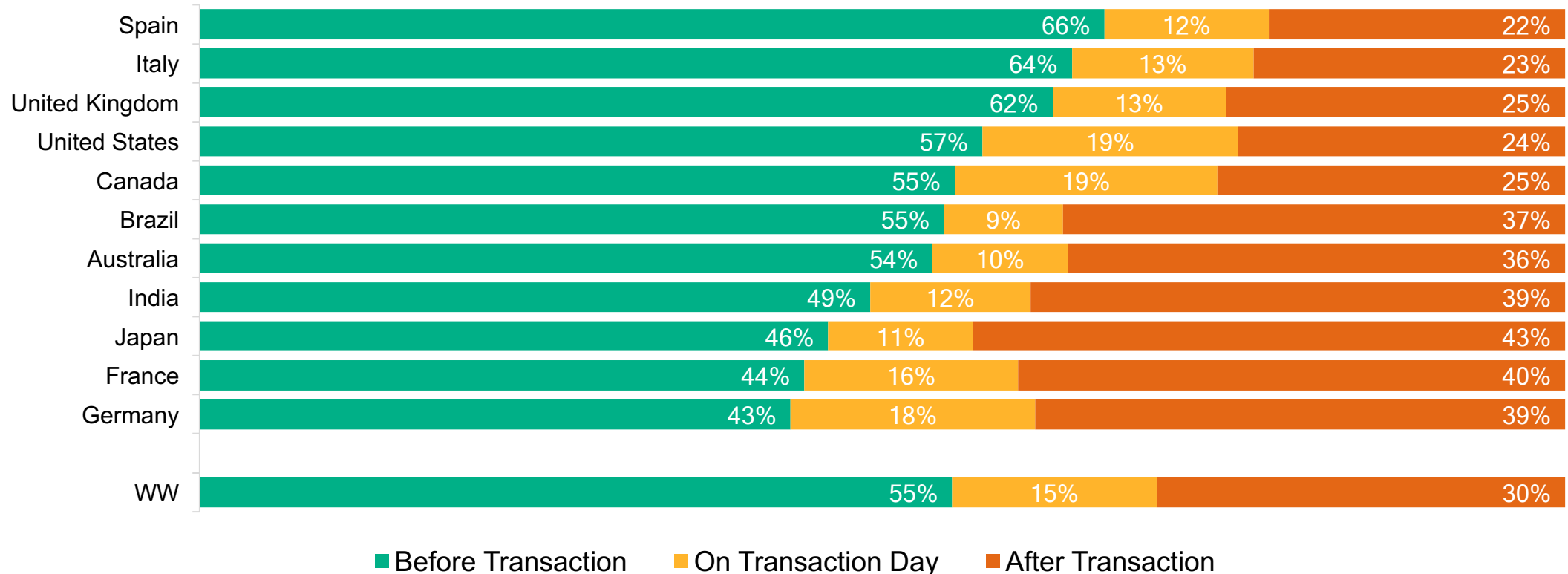
First TripAdvisor Visit



OTA Transactors: When do they visit TripAdvisor?

- Worldwide, 55% of OTA transactors visit TripAdvisor before their purchase
- Spain has the highest proportion of OTA transactors who visit before the purchase day
- In Japan, 43% of TripAdvisor visitors visit after their OTA transaction

First TripAdvisor Visit



Average Path to Purchase

Users are more engaged at the start and end of their research with a slight lull in the middle. Hotel transactors spend the highest amount of time researching, peaking towards the end of their research

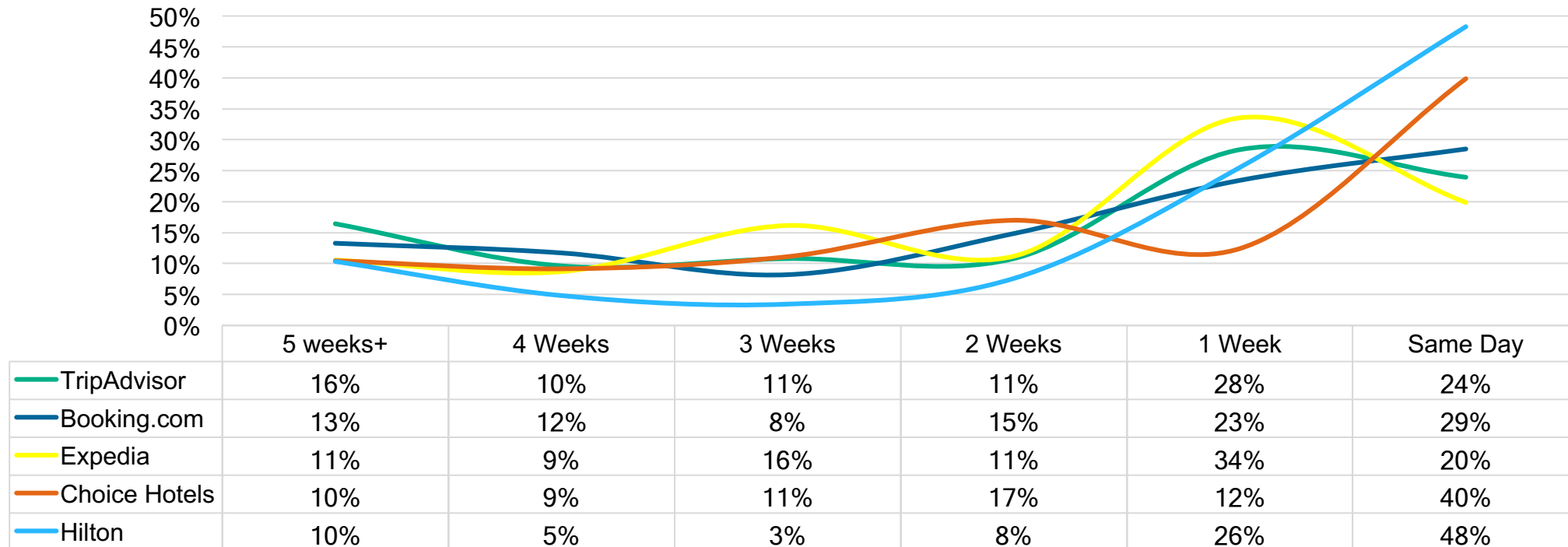
Average Minutes

	Start	Middle	End	Total
Airlines	50.8	49.7	59.3	159.7
Hotels	58.7	57.9	74.8	191.4
OTAs	50.3	44.9	56.1	151.3
TripAdvisor Users	54.1	48.6	61.3	164.0

Most popular sites visited prior to a Hotel transaction

- The week before a hotel transaction is generally when the most popular sites in the purchase process are most visited
- Nearly half of Hilton visits occur on the same day as a transaction

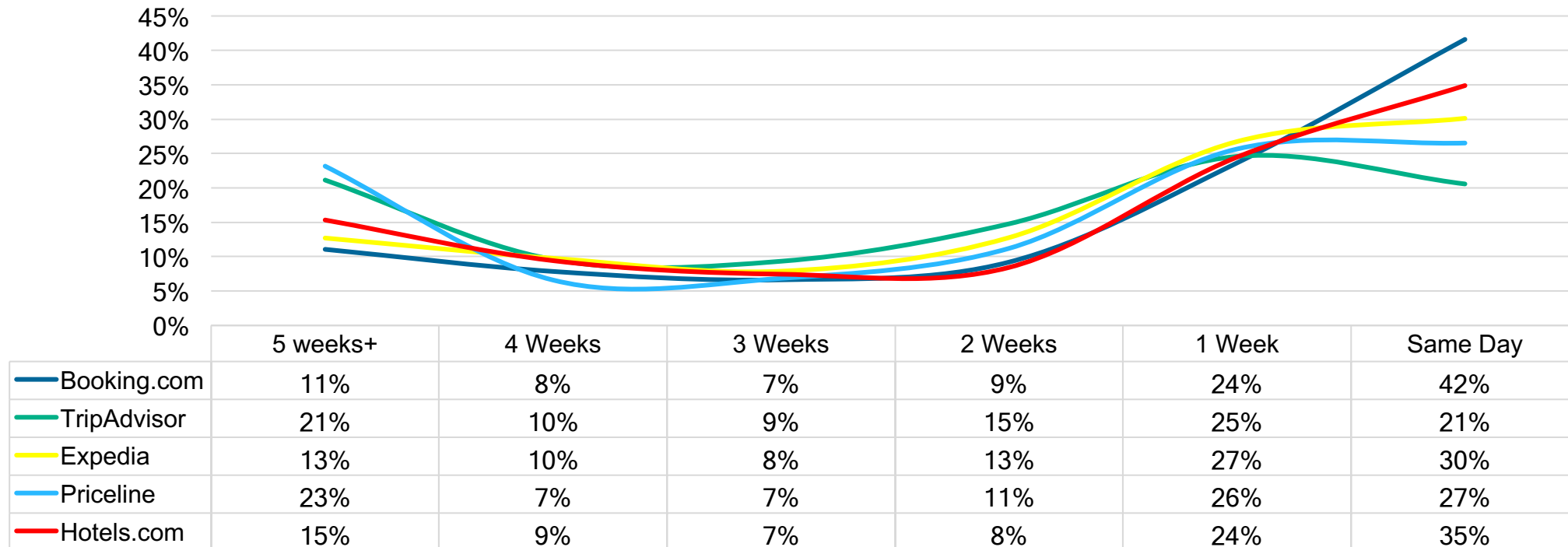
Share of visits to most popular sites prior to Hotel transactions



Most popular sites visited prior to a OTA transaction

- There appears to be a similar pattern amongst users of the most visited sites with activity dropping after the initial research before building up closer to booking time
- There is a lot of activity in the week leading up to the transaction with nearly half of Booking.com visits occurring on the day of booking

Share of visits to most popular sites prior to OTA transactions





Appendix – Supporting material



comScore Methodology

- comScore measures the **online activity** of a panel in **excess of 2 million people**
- The comScore panel is a representative cross section of **worldwide regions and countries**, with a consistently defined universe of users
- comScore’s approach continuously and passively tracks all **online behaviour** of panel members in more than **200 countries**
- Once the comScore meter is downloaded and installed on a panelist’s machine, comScore **sees everything they do online**



Sites Studied for Transactions

4travel.jp	aircanada.com	ana.co.jp	britishairways.com	cruisedeals.co.uk	enterprise.com	firstchoice.co.uk	holidaycheck.de
aa.com	airchina.com.cn	applevacations.com	budget.com	csair.com	enterprise.de	flightcentre.com.au	holidaygems.co.uk
ab-in-den-urlaub.de	aireuropa.es	asiatravel.com	buget.com	ctrip.com	enterprise.es	flighthub.com	holidayinn.com
accorhotels.com	airfrance.ca	atrapalo.com	carnival.com	cvc.com.br	enterprise.uk	fluege.de	homeaway.co.uk
aerlingus.com	airfrance.co.uk	austrian.com	cathaypacific.ca	daysinn.com	escapadarural.com	flybe.com	homeaway.com
aeroflot.ru	airfrance.com	avianca.com	cathaypacific.co.jp	decolar.com	eurostar.co.uk	flyfrontier.com	homelidays.com
aerolineas.com.ar	airfrance.com.br	avianca.com.br	cathaypacific.com	delta.com	eurostar.com	fourseasons.com	homelidays.es
agoda.com	airfrance.fr	avis.com	ceair.com	disney.go.com	euowings.com	germanwings.com	homelidays.it
airasia.com	airfrance.us	bahia-principe.com	celebritycruises.co.uk	disneyland.disney.go.com	expedia.ca	goibibo.com	hooroo.com
airasiago.com	airindia.in	bahn.de	cheapcaribbean.com	disneyworld.disney.go.com	expedia.co.in	goindigo.in	hostelworld.com
airberlin.com	airnewzealand.co.nz	barcelo.com	cheapoair.ca	dollar.com	expedia.co.jp	greyhound.com	hoteis.com
airbnb.ca	airtran.com	bestwestern.co.uk	cheapoair.com	easyjet.com	expedia.co.uk	h10hotels.com	hotel.de
airbnb.co.in	airtransat.ca	bestwestern.com	cheaptickets.com	ebookers.com	expedia.com	happyhotel.jp	hotel.qantas.com.au
airbnb.co.uk	airtransat.com	bestwestern.de	choicehotels.ca	ebookers.fr	expedia.com.au	haven.com	hotelclub.com
airbnb.com	alamo.com	bestwestern.fr	choicehotels.com	edreams.co.uk	expedia.com.br	hawaiianair.com	hoteles.com
airbnb.com.br	alaskaair.com	bestwestern.it	cleartrip.com	edreams.es	expedia.de	helloworld.com.au	hotelindigo.com
airbnb.de	alaskaair.net	book.goindigo.in	cncn.com	edreams.fr	expedia.es	hertz.ca	hotels.com
airbnb.es	alaskaairlines.com	booking.com	copaair.com	edreams.it	expedia.fr	hertz.com	hotels.de
airbnb.fr	alitalia.com	bookit.com	costacrociere.it	elong.com	expedia.it	hertz.com.br	
airbnb.it	americanexpress-travel.com	bookryanair.com	courtyard hotels	emirates.com	fairmont.com	hilton.com	
airbnb.jp	amtrak.com	breakfree.com.au	crowneplaza.com	enterprise.ca	fewo-direkt.de	his-j.com	

Sites Studied for Transactions

hotels.fr	jetstar.com	malaysiaairlines.com	onthebeach.co.uk	riu.com	super8.com	travelrepublic.co.uk	virgintrainseastcoast.com
hotels.it	jreast.co.jp	mandarinoriental.com	opodo.co.uk	royalcaribbean.co.uk	swiss.com	travelyaari.com	voeazul.com.br
hotelsclick.com	jtb.co.jp	mangocity.com	opodo.de	royalcaribbean.com	tajhotels.com	tui.com	voegol.com.br
hoteltravel.com	justfly.com	mantra.com.au	opodo.fr	rumbo.es	tam.com.br	tui.fr	volagratis.com
hotelurbano.com	klm.com	marriott.co.uk	opodo.it	rurubu.com	tamviagens.com.br	tuniu.com	volaris.com
hotwire.com	knt.co.jp	marriott.com	orbitz.com	rurubu.travel	thetrainline.com	turkishairlines.com	volotea.com
hrs.com	koreanair.com	marriott.de	ownersdirect.co.uk	ryanair.com	thomascook.com	uhaul.com	voyages-sncf.com
hrs.de	kuoni.co.uk	melia.com	oyorooms.com	sawasdee.com	thomascook.de	unidas.com.br	vrbo.com
hyatt.com	lan.com	mercure.com	pegipegi.com	seureshoppingbasket.com	thomascook.fr	united.com	vueling.com
iberia.com	lastminute.com.au	meridiana.it	premierinn.com	shangri-la.com	thomson.co.uk	universalorlando.com	webjet.com.au
iberostar.com	latam.com	mgmresorts.com	priceline.com	singaporeair.com	thrifty.com	universalstudioshollywood.com	westjet.com
ibis.com	laterooms.com	monarch.co.uk	princehotels.co.jp	skyticket.jp	tieyou.com	usairways.com	wimdu.de
ihg.com	localiza.com	movida.com.br	promovacances.com	smiles.com.br	tigerair.com	vegas.com	wimdu.es
ikyu.com	loewshotels.com	nationalcar.ca	pullmanhotels.com	sofitel.com	tiket.com	venere.com	wizzair.com
irctc.co.in	logitravel.com	nationalcar.com	qantas.com.au	southwest.com	toyoko-inn.com	viajanet.com.br	wotif.com
jal.co.jp	loveholidays.com	nationalexpress.com	qatarairways.com	spicejet.com	travel.americanexpress.com	vikingrivercruises.com	wyndham.com
Jalan.net	lq.com	nh-hoteles.es	qunar.com	spirit.com	travel.rakuten.co.jp	virginamerica.com	wyndhamhotels.com
jet2.com	lufthansa.com	norwegian.com	rakuten.co.jp	starwoodhotels.com	travelbag.co.uk	virgin-atlantic.com	yatra.com
jet2holidays.com	lv mama.com	novotel.com	rakuten.com	starwoodhotels.com/Sheraton	travelocity.ca	virginaustralia.com	
jetairways.com	ly.com	nta.co.jp	ramada.com	starwoodhotels.com/westin	travelocity.com	virginholidays.co.uk	
jetblue.com	makemytrip.com	omnihotels.com	redroof.com	starwoodhotels.com/whotels	travelodge.co.uk	virgintrains.co.uk	



know better  book better  go better