



Northern Ireland Hotels Federation March 2022

Tripadvisor Traveler Insights



Justin Reid, Director of Destinations,
Hotels and travel, Europe, Middle East
and Africa

Tripadvisor is the world's largest travel guidance platform



Global reach + recognition

Align with **20+** years of trust that brings **463 million** loyal and active users to Tripadvisor monthly across 190 countries.



Driven by data

Translate powerful proprietary first-party insights to connect with your passionate consumer.



Trusted content

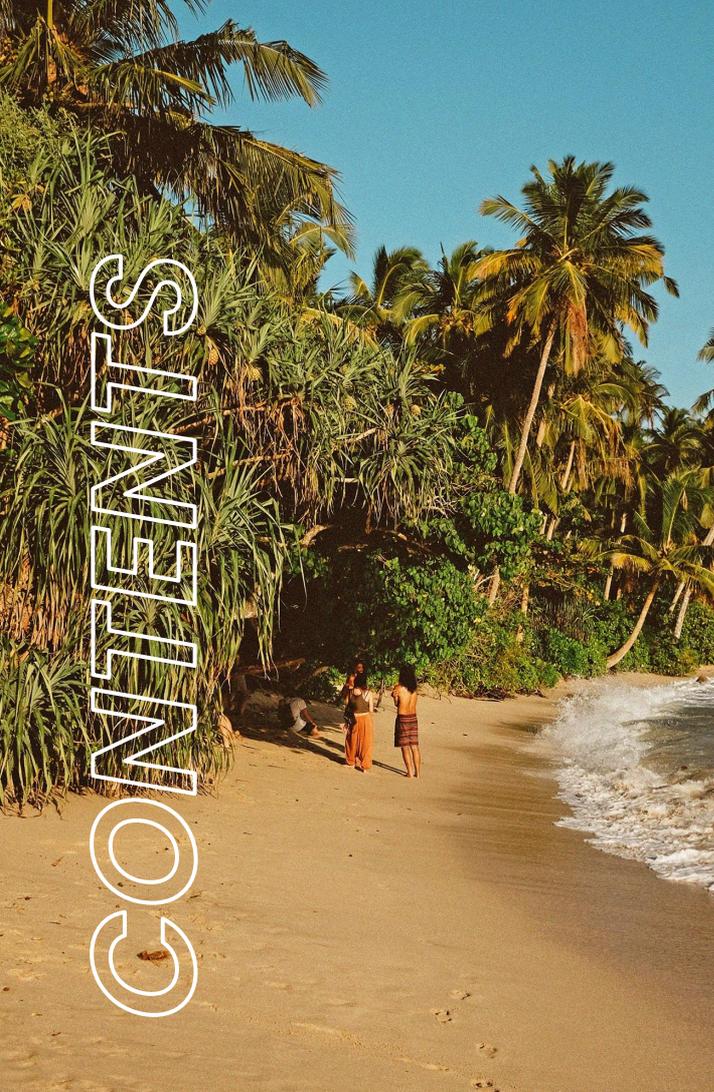
Tap into people-powered planning and the expertise of our world-class editorial team in a brand safe environment.



Proven success

Leverage our best-in-class measurement products to prove success.





CONTENTS

1. High level summary

Overview of insights and takeaways

2. Who is traveling

Understanding seasonality trends
Hotels, Restaurant, and Attractions trends

3. Where are they going

Popular destinations across the globe

4. When are they going

Travel intent by check in month
Average duration and booking value



Quick hits from the deck



While we saw traffic decrease in February, today's travel optimism tells a little bit of a different story - hotels clickers have increased month over month, as countries reopen once again

Hotels clickers in all regions increased in the last 6 weeks, although European travel intent really stands out this month; European travelers are eager to travel more, for a longer period of time, and at a higher cost.



Overall interest in international travel has grown YoY, but not yet at pre-pandemic levels

Zeroing in on the United States specifically - the majority of travel intent remains domestic, although Americans are eager to travel to sunny destinations like Mexico, DR, and PR ... and even Italy has made the top 5 list of destinations during this month



The vast majority of travel being booked for this month is to domestic destinations, while international stays are planned further in advance

With that, 25% of travel planned in the last week is for last minute trips, within the next 2 weeks





Who is traveling

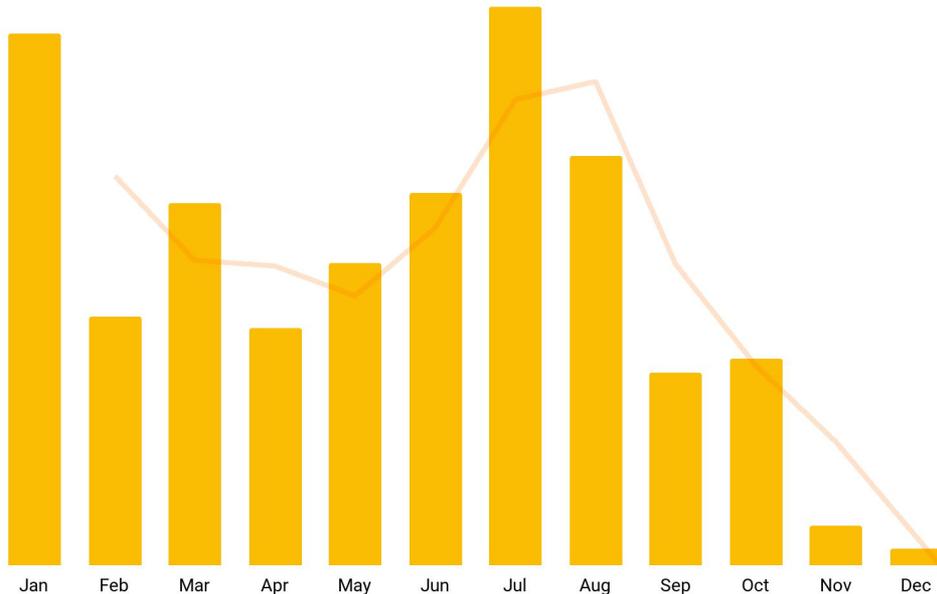


Setting Expectations with Seasonality

Understanding traffic trends based on seasonality is essential - we can't always be expecting an increase in traffic, rather we need to set expectations based on trends established by existing data

Understanding Seasonality and Setting Expectations with 2019 Hotel Clickers Data

Data is based on global IPs and sum of hotel clickers within the top 30 GEO destinations per country



*Summer: June, July, August

- January and July are the busiest months for users booking travel
- Things begin to wind down in early Q4, when number of hotel clickers begins to drop through the end of the year
- The Summer* months are continuously healthy with travellers booking stays consistently between mid-May towards the very end of August

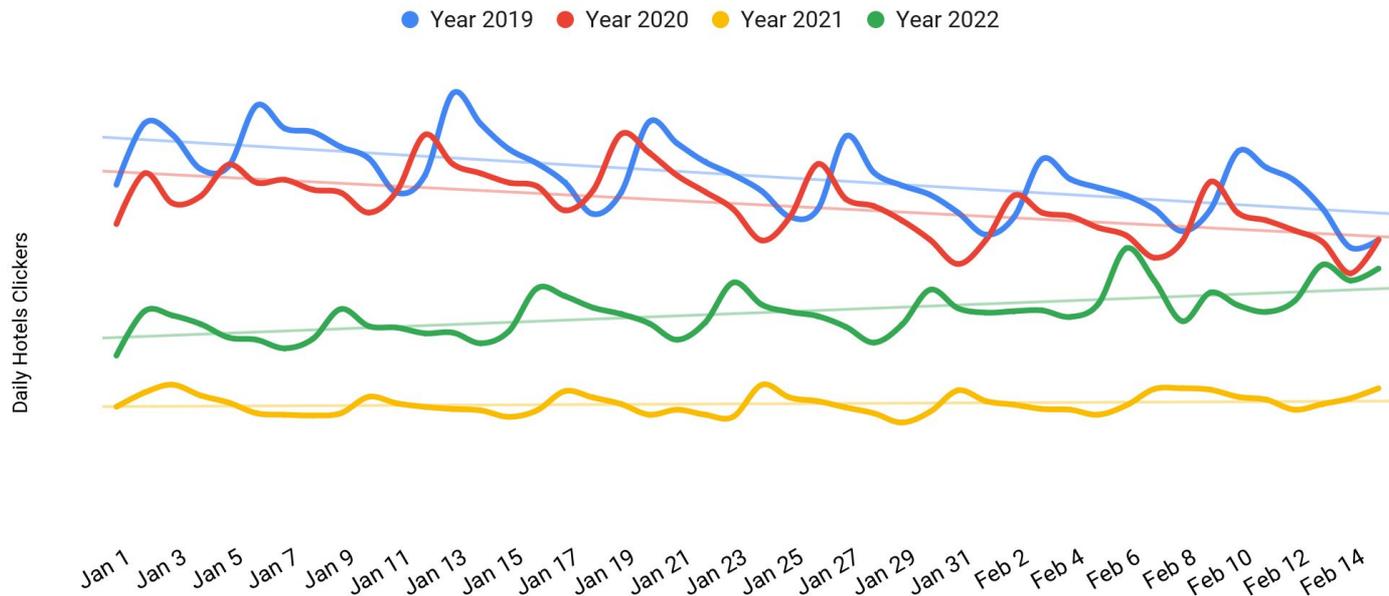


Travel intent has nearly reached 2019 levels

While we expect traffic to decrease in February, today's travel optimism tells a little bit of a different story - hotels clickers have increased month over month, as countries reopen once again

Before the pandemic, clickers decreased ~13% in the first 6 weeks of the year. In 2022 (today), hotels clickers have increased more than +22% since the first week of Jan.

Daily Hotel Clickers Trending over time | 2020 - 2022

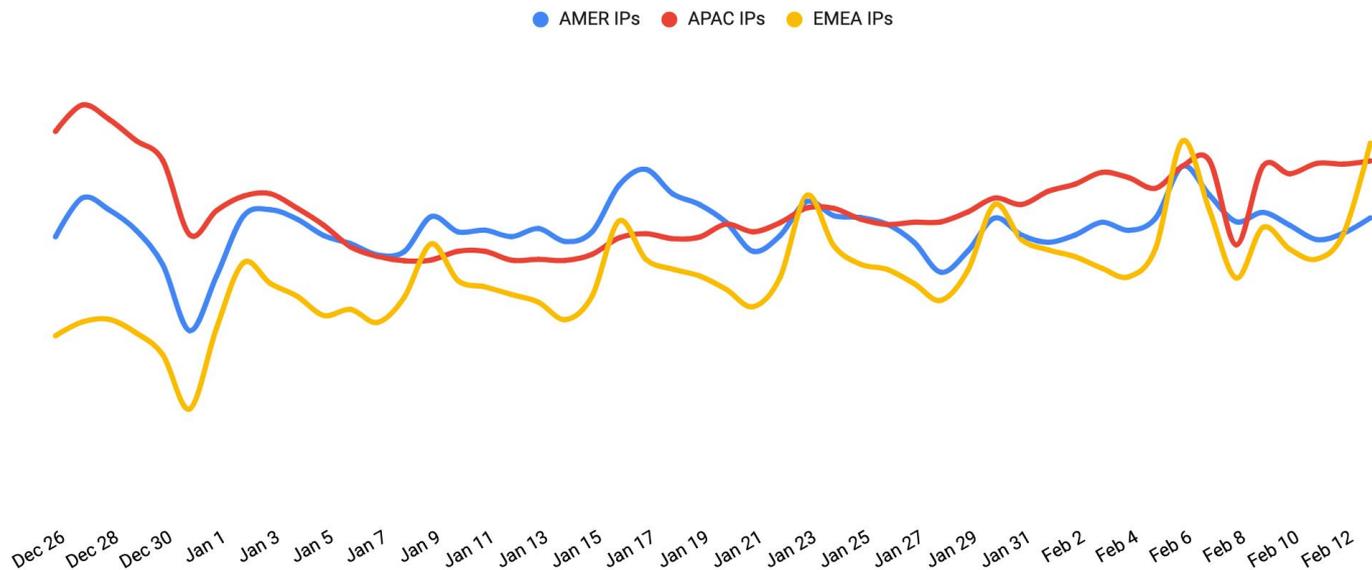


European travel intent has shown the strongest increase in hotels clickers since the beginning of the year

While hotels clickers in all regions increased in the last 6 weeks, the number of users clicking to book stays from European IPs have nearly doubled since the first week of January

Daily Hotel Clickers trending by Region

APAC sits on a secondary axis due to volume difference

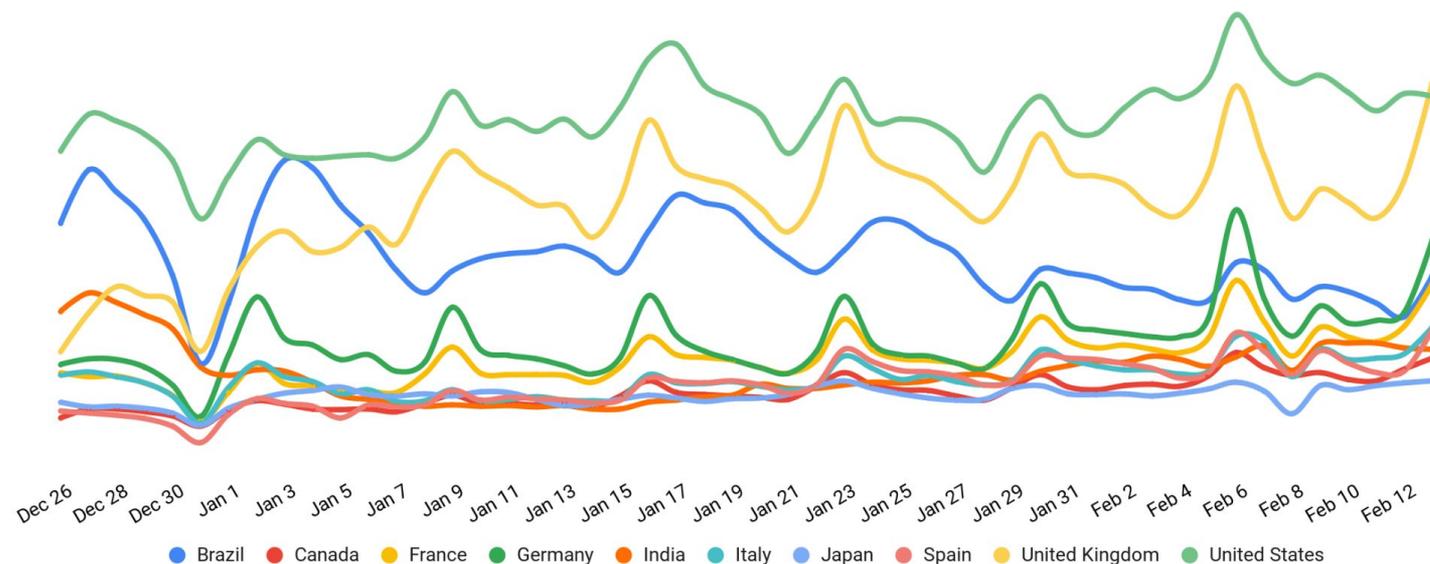


Travellers in the UK are showing promising signs of travel recovery as hotel clickers increase 3X

Weekly hotel clickers in UK IPs have increased 3.2X since the first week of January. With that, travellers across other major European markets are showing similar trends of optimism – hotels clickers in Germany, Italy, and Spain have all increased at least 3X since the beginning of the year.

Daily Hotel Clickers trending by Country - Top 10 Markets

US sits on a secondary axis due to volume difference



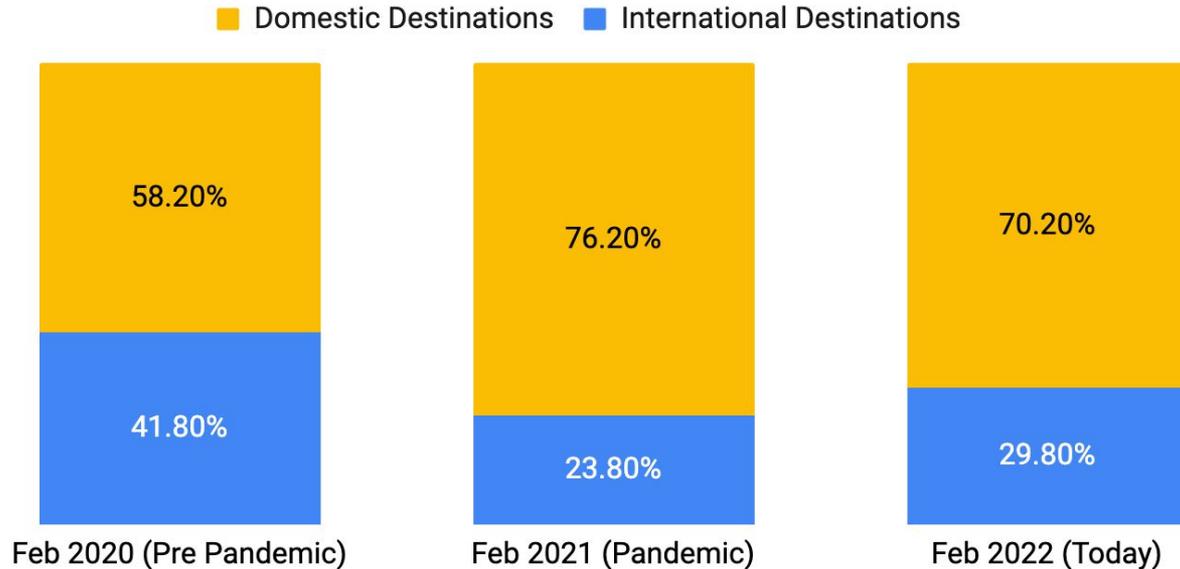


Where are they going

Overall interest in *international* travel has grown YoY, but not yet at pre-pandemic levels

Remember: traveler behavior continues to evolve in this 'new normal', so it's important to continue monitoring how destinations preferences evolve alongside our regular, seasonal trends and expectations

Share Distribution of Travel Intent over time

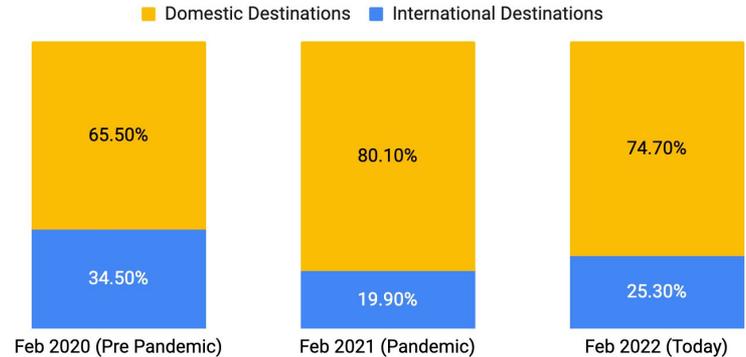


The distribution of domestic vs. international travel intent across IPs in the Americas

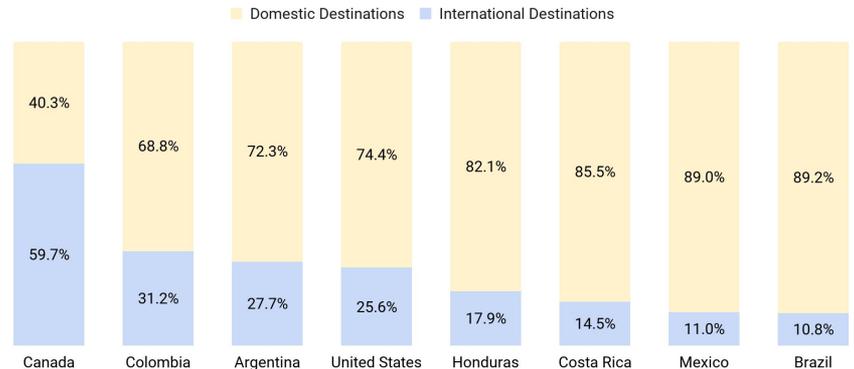
More than a quarter of American travellers are now planning international stays, which is a healthy increase in share from this time last year (Feb 2021)

Of the major markets across the Americas, **Canada is most eager to travel aboard**, with nearly 60% of travelers booking international stays this month

Share Distribution of Travel Intent over time | AMER



Share Distribution of Travel Intent Today | AMER IPs | Feb 1-16, 2022

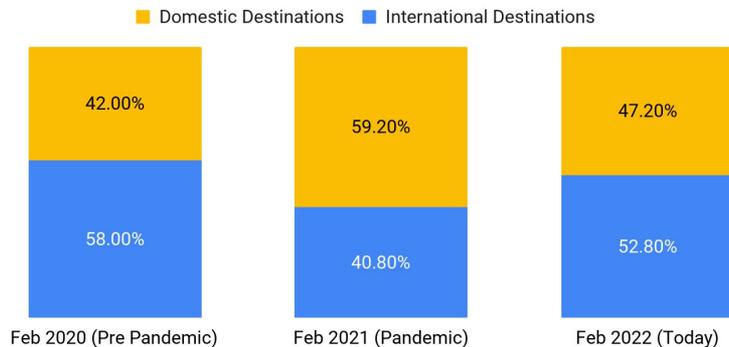


The distribution of domestic vs. international travel intent across IPs in Europe and Middle East

International travel intent for EMEA IPs is recovery much faster than any other region – **more than half of today’s travel is being planned to destinations abroad**

Of the major markets across Europe and the Middle East, users in **The Netherlands, Switzerland and Sweden are all more keen on traveling internationally** than anyone else, with an average of ~70% users clicking to book hotels outside of their home country today

Share Distribution of Travel Intent over time | EMEA



Share Distribution of Travel Intent Today | EMEA IPs | Feb 1-16, 2022

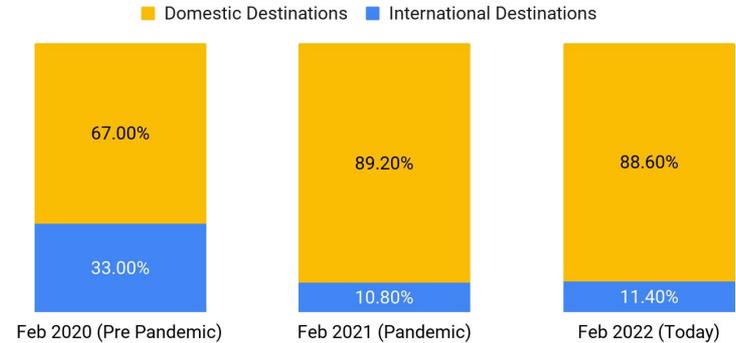


The distribution of domestic vs. international travel intent across APAC IPs

Consumers in APAC are more keen on staying domestic, even as cases continue to decrease across the region

Of the major APAC markets though, **travellers in Singapore are more likely to travel abroad** than travellers from any other APAC country, with 43% already booking international stays

Share Distribution of Travel Intent over time | APAC



Share Distribution of Travel Intent Today | APAC IPs | Feb 1-16, 2022



Destinations in Europe, Middle East and Africa

Major inner city destinations like **London, Madrid, and Paris** have regained **popularity** as some of the most traveled to domestic destinations - travelers are increasingly becoming more comfortable with visiting populous cities

Dubai, UAE is the top international destination in EMEA gaining popularity from travelers abroad

Domestic GEOs	International GEOs
London, UK	Dubai, UAE
Madrid, ES	Paris, FR
Paris, FR	London, UK
Rome, IT	Istanbul, TR
Hamburg, DE	Rome, IT
Berlin, DE	Barcelona, ES
Liverpool, UK	Amsterdam, NL
Edinburgh, UK	Lisbon, PT
Seville, ES	Marrakech, MO
Benidorm, ES	Costa Adeje, ES

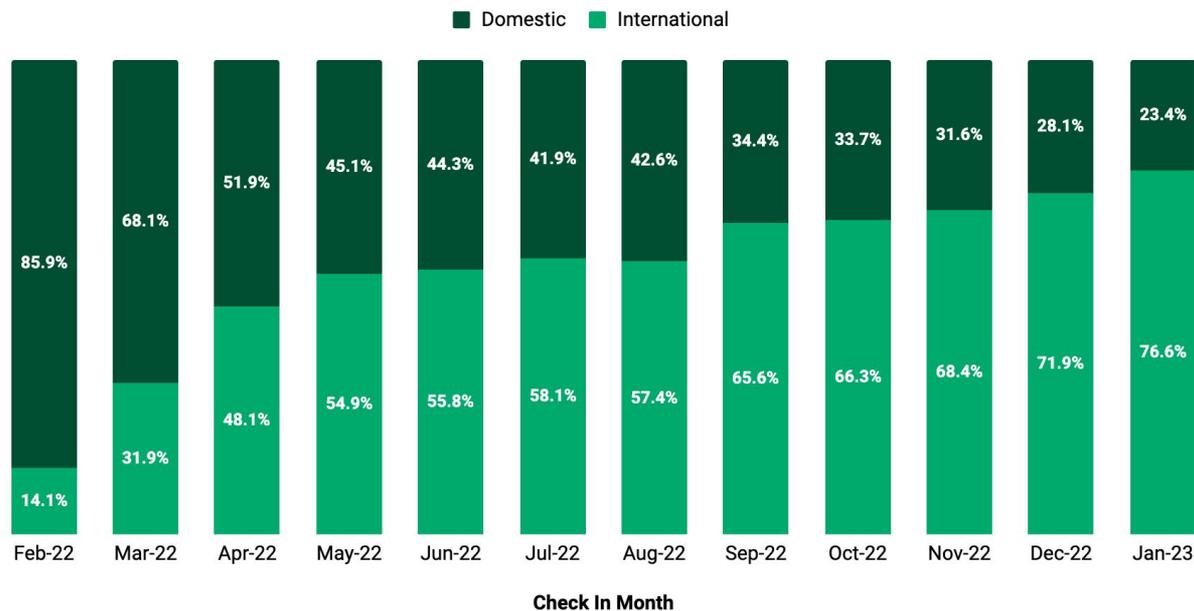


When are they going

The vast majority of travel being booked for this month is to domestic destinations, while international stays are planned further in advance

Distribution of Travel Intent by Check In Month: Domestic vs International

Global IPs, data based on users searching for hotels >= Feb 17, 2022

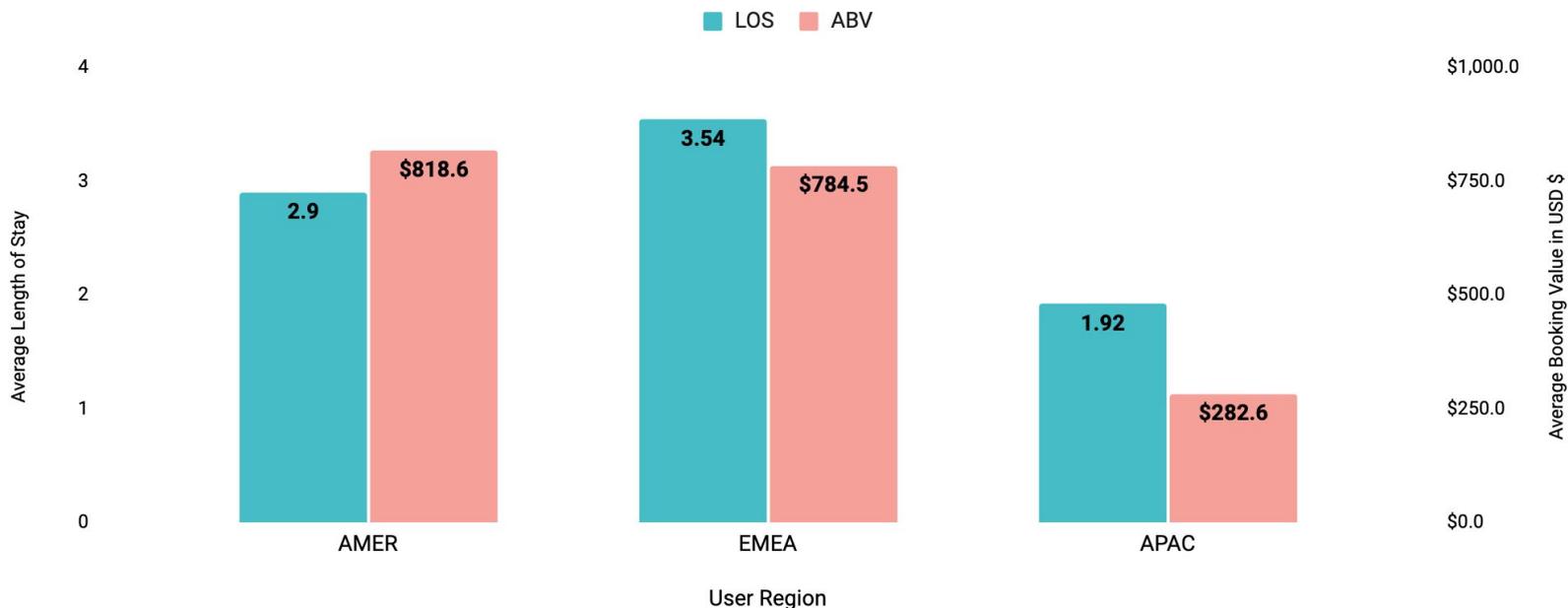


Travelers in EMEA are more eager to travel internationally, for a longer period of time, at a higher cost

It's important to note that average booking value is dependant on type of hotel chosen, rate plans (which are owned by the hotelier and can vary frequently), and the currency of the country

Length of Stay and Average Booking Value (in USD \$) by User Region

Data reflects user entered dates only, adults = 2, searches made after Feb 17, 2022 with check in dates between Feb 17 and May 31, 2022



And what of Northern Ireland?



And what of Northern Ireland?

Galgorm Spa & Golf Resort	21023
Europa Hotel - Belfast	16809
Slieve Donard Resort and Spa	16686
Templeton Hotel	15738
Grand Central Hotel	15125
Lough Erne Resort	14332
Titanic Hotel Belfast	13959
Finn Lough	13128
Maldron Hotel Belfast City	11684
Culloden Estate & Spa	11160
Jurys Inn Belfast	10715



THANK YOU

