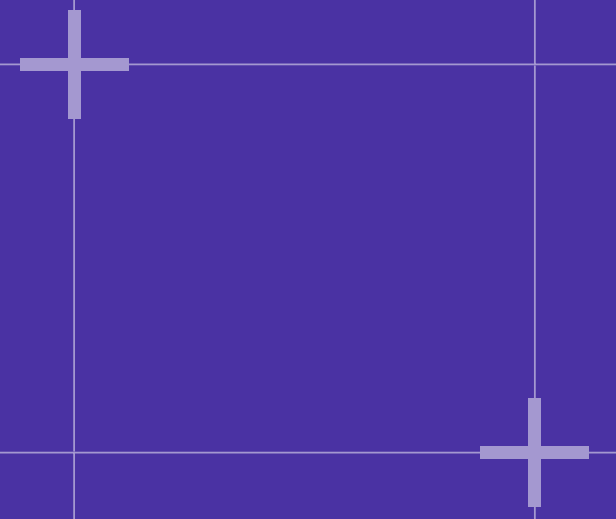




2019 Report

trivago Industry Insights: Traveler Profile

Discover key findings about traveler hotel search behavior on metasearch



About the report

Metasearch is a critical component in the online hotel marketing and distribution landscape, with more than 94% of online travelers ¹ choosing metasearch when booking accommodation online. This translates into millions of searches that give leading metasearch platforms, such as trivago, an enormous amount of data about traveler behavior.

This report gives a profile of travelers in Europe, North America, Latin America, and Oceania based on data for travel in 2018. The report reveals:

- **Where travelers are going to and coming from**
- **How the main types of travelers are identified**
- **Which factors narrow down a traveler's hotel search options**
- **What prices travelers pay and how much they are prepared to pay**
- **When travelers book, when they travel, and how long they stay**
- **How to access data on a hotel's specific audience of travelers**

Data Notes: Data is based on searches on trivago in 2017 and 2018 for travel during 2018. Data relating to filters (price, star category, guest rating, and top amenities) is based on interaction with these filters during a search. Other data in the report is based on relevant information from click-outs. A click-out is where a traveler clicks on a hotel rate on trivago and is taken to the booking site to complete their reservation. Data for seasonal averages was compiled from data from 2016 to 2018.

Data is for travel to the following markets: Europe (Austria, Belgium, France, Germany, Greece, Ireland, Italy, Netherlands, Spain, Switzerland, and the UK), Latin America (Argentina, Brazil, Chile, Colombia, and Mexico), North America (Canada and the USA), and Oceania (Australia and New Zealand)

Please note percentages may not add to 100% due to rounding.

¹ EyeforTravel, The State of Hospitality Distribution: Metasearch, 2018

Key findings & insights



Where are travelers going to?

Most popular destinations per region



Europe

1. London, United Kingdom
2. Paris, France
3. Amsterdam, Netherlands
4. Rome, Italy
5. Barcelona, Spain
6. Berlin, Germany
7. Madrid, Spain
8. Hamburg, Germany
9. Milan, Italy
10. Venice, Italy



Latin America

1. Cancun, Mexico
2. Rio de Janeiro, Brazil
3. São Paulo, Brazil
4. Buenos Aires, Argentina
5. Playa del Carmen, Mexico
6. Puerto Vallarta, Mexico
7. Acapulco, Mexico
8. Mazatlán, Mexico
9. Gramado, Brazil
10. Florianópolis, Brazil



North America

1. New York, USA
2. Las Vegas, USA
3. Orlando, USA
4. Miami Beach, USA
5. San Francisco, USA
6. Honolulu, USA
7. Toronto, Canada
8. Chicago, USA
9. Myrtle Beach, USA
10. Niagara Falls, Canada



Oceania

1. Sydney, Australia
2. Melbourne, Australia
3. Auckland, New Zealand
4. Brisbane, Australia
5. Surfers Paradise, Australia
6. Perth, Australia
7. Adelaide, Australia
8. Canberra, Australia
9. Queenstown, New Zealand
10. Wellington, New Zealand

Did you know?

A majority of travelers to Europe chose destinations outside the top 100

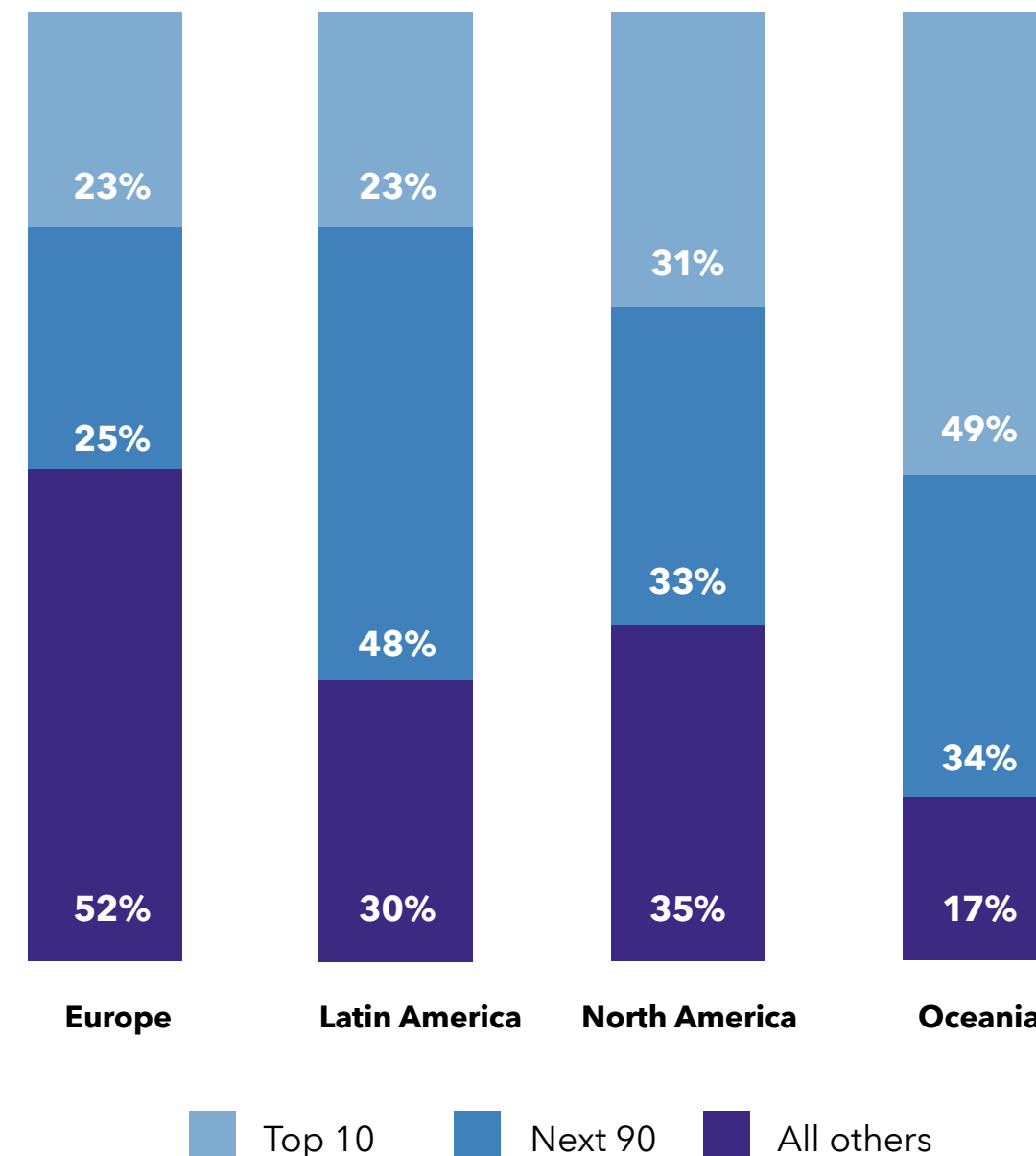


What is the share of travel to top destinations?

While there can be a lot of focus on the top destinations, less typical destinations also attract a significant number of travelers.

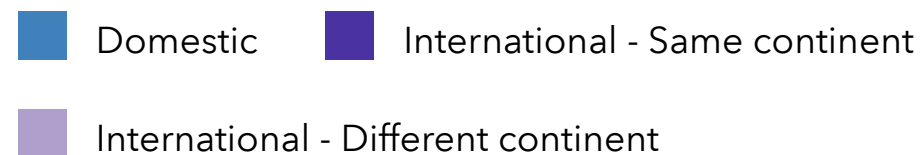
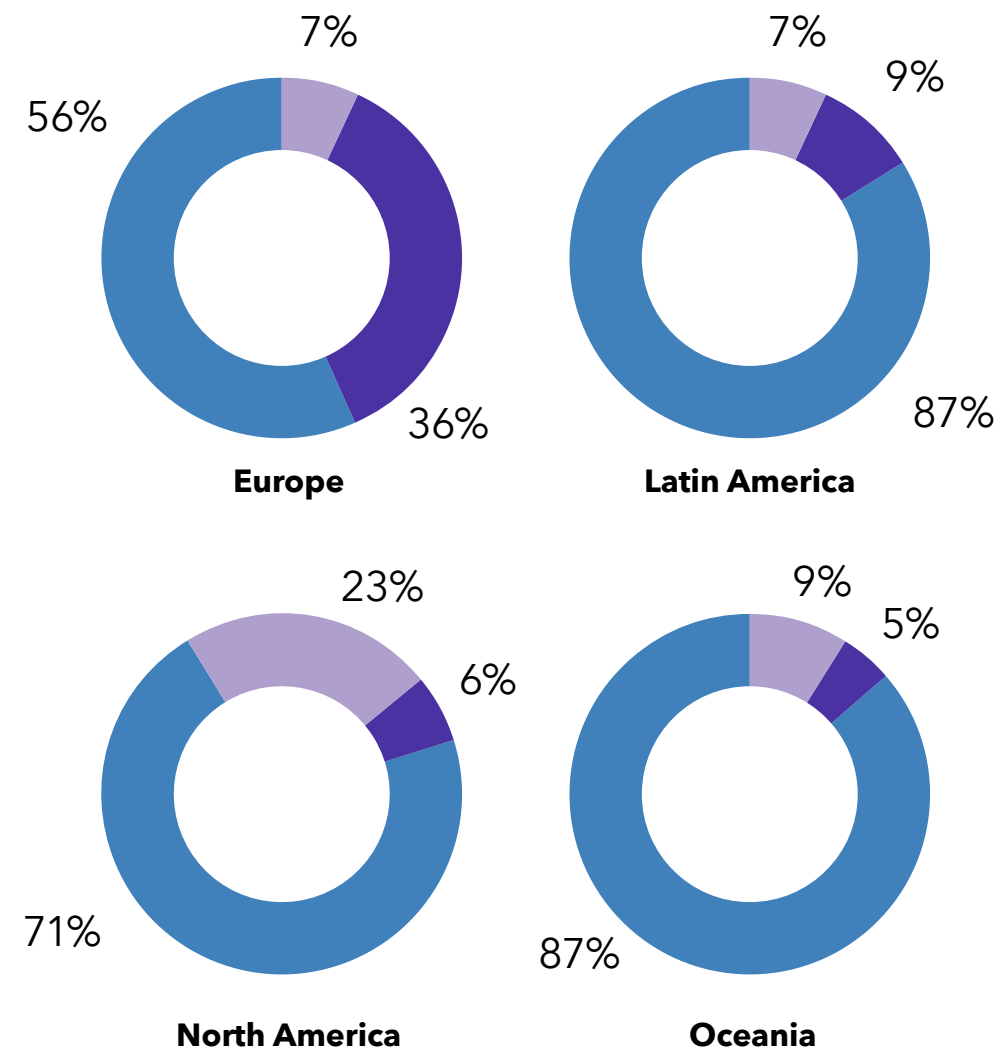
While in Oceania the top 10 destinations account for 49% of searches for the continent from trivago, in Europe and Latin America they make up only 23%.

Travel to the top 100 destinations make up a significant majority in all regions except travel to Europe, where a majority (52%) goes to destinations outside the top 100. This shows the popularity of less typical destinations in Europe compared to other regions.



Where are travelers coming from?

Domestic and international travel breakdown



The source of the majority of travelers to all regions is domestic. In particular in Latin America and Oceania domestic travelers are the dominant travel source.

However, within Europe there is a significant amount of travel between European countries (36%). In North America there is a greater amount of travel coming from other continents, mainly Europe.

Europe has the most internal travel, while North America has the most visitors from other regions

How are the main types of travelers identified?

Short stay and long stay breakdown

Travelers can be identified by when they travel and how long they stay, with three clear categories of travelers emerging. Those who travel for longer periods, of six days or more, can be categorized as long-stay travelers. For shorter stays two separate groups emerge: weekend travelers being those that stay over the weekend, and weekday travelers that have a majority of their trip during the working week.

Overall short stays make up the majority of travel, with the weekends the most popular time. However, a significant amount of travelers also stay during the week.

Long-stay travel represents a smaller but highly valuable share of travelers.

43%
Weekend travelers
Those who search for travel dates on the weekend.

15%
Long-stay travelers
Those who search for stays of at least six days or longer.



43%
Weekday travelers
Those who look for short stays with the majority of their trip during the working week.

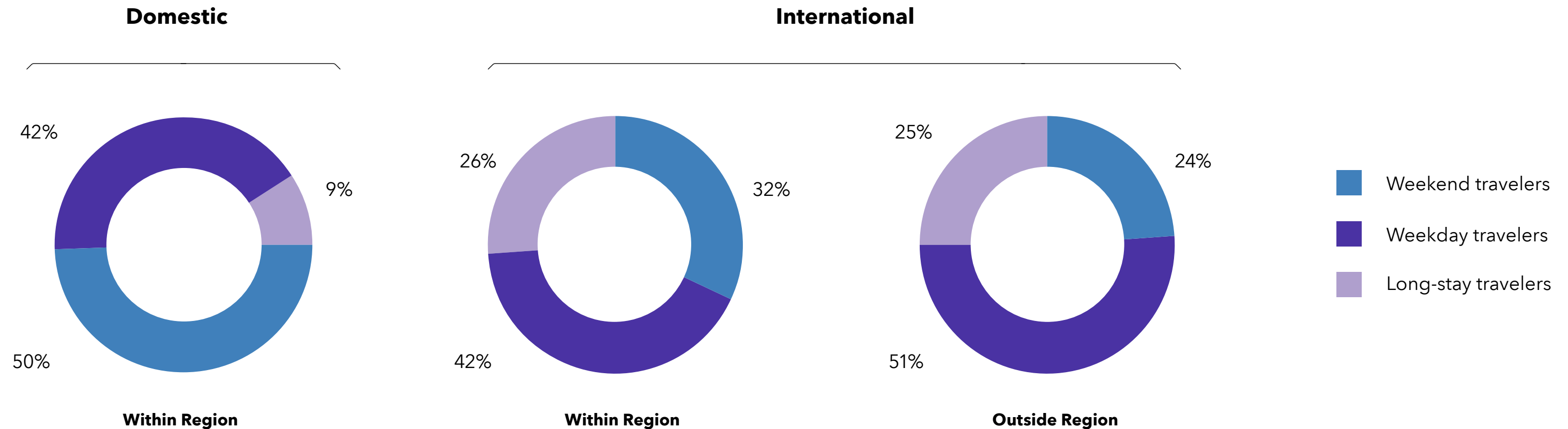
Did you know?

Half of domestic travelers are taking weekend trips



How do the different traveler types vary?

Traveler types by traveler origin



The types of travelers are also strongly related to where the traveler is coming from. Domestic travelers are more likely to make short weekend trips, while those coming from international destinations make more weekday and long-stay trips.

Travelers from outside the region are more likely to stay during the week or for long trips

What is most important for travelers?

Top filters used on trivago



54%
Price



29%
Star category



21%
User rating



15%
Top amenities

The most used filters on trivago give an insight into the most important factors for travelers when looking for a hotel.

The top filters were price, star rating, guest rating and top amenities, indicating that price, hotel quality (according to the hotel and users reviews), and amenities provided were the most important factors in deciding on the ideal hotel.

The use of the different filters was consistent across the different regions.

The price filter is the most commonly used filter on trivago

What prices are travelers paying and what are they prepared to pay?



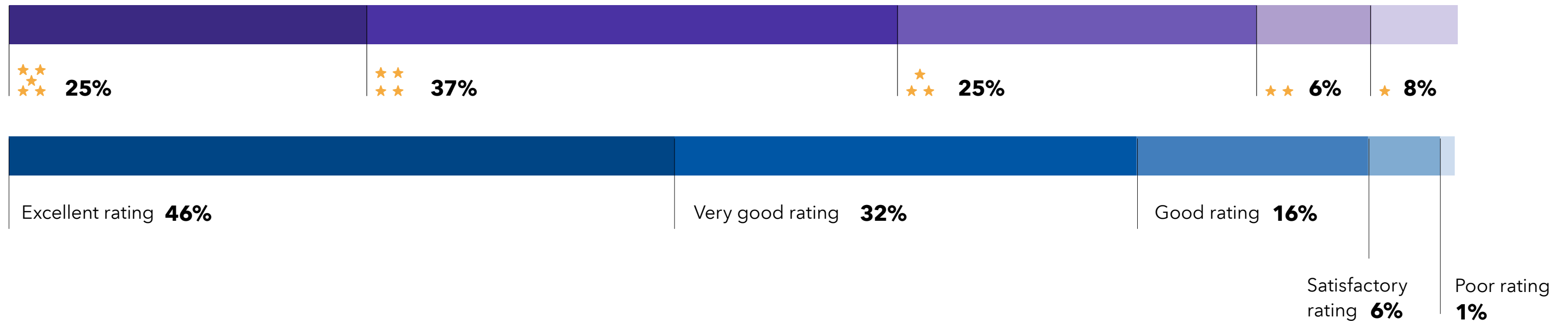
North America had the highest average clicked prices, while Latin America had the lowest

It is clear that price is a determining factor in selecting a hotel. However, the average price that travelers select using the price filter is generally higher than the average price they end up selecting.

Latin America was the only region where the price filter was close to the average click-out price.

On a destination level cities with high average prices tended to see the filter used to find below average prices, while in cheaper destinations the price filter was well above average prices.

Which ratings are important to travelers?



78% of travelers who filtered by guest rating chose "Excellent" or "Very good"

When travelers looked at hotel quality, those who used the filters tended to focus on higher quality accommodations.

The most popular choice for star rating was for four stars or above with 37%.

Overall 87% of those using the filter selected one of the options for 3 stars or higher.

For guest ratings, travelers were even more discerning, with 46% selecting to filter only to those hotels with an "Excellent" rating, and 78% either "Very good" or "Excellent."

Did you know?

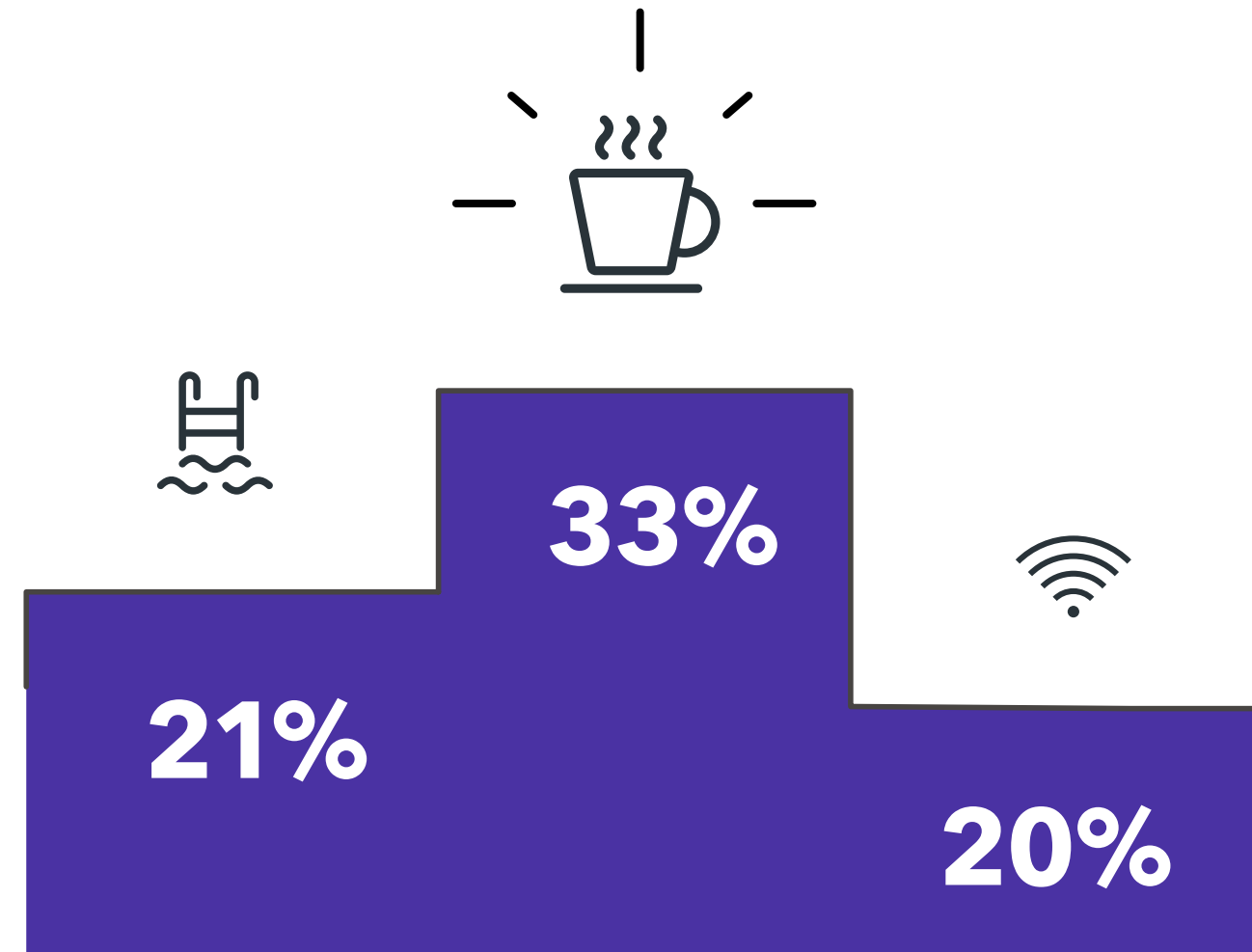
Included breakfast is the most popular amenity filter for travelers on trivago



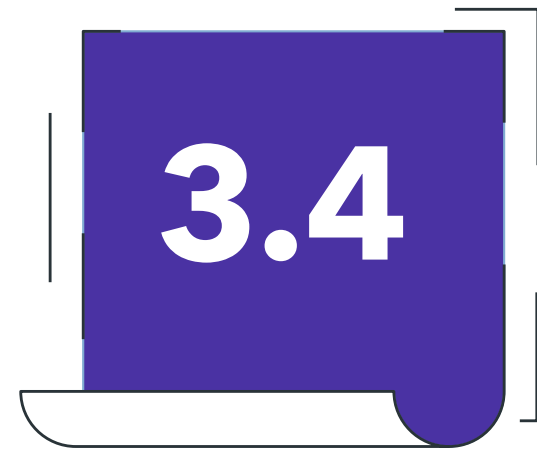
What amenities are most important to travelers?

When looking at the top amenities that travelers looked for, the most popular was an included breakfast with 33% of those who used the top amenities filter selecting it.

A hotel pool and free WiFi were the second and third most popular amenities.



How long do travelers stay?



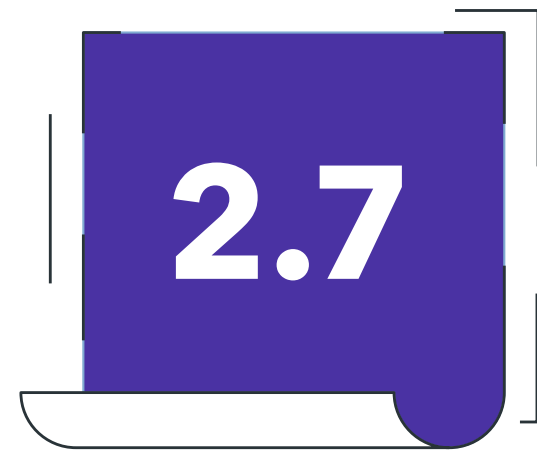
Europe



Latin America



North America



Oceania

Travelers to Latin America stayed on average the longest with 3.5 nights

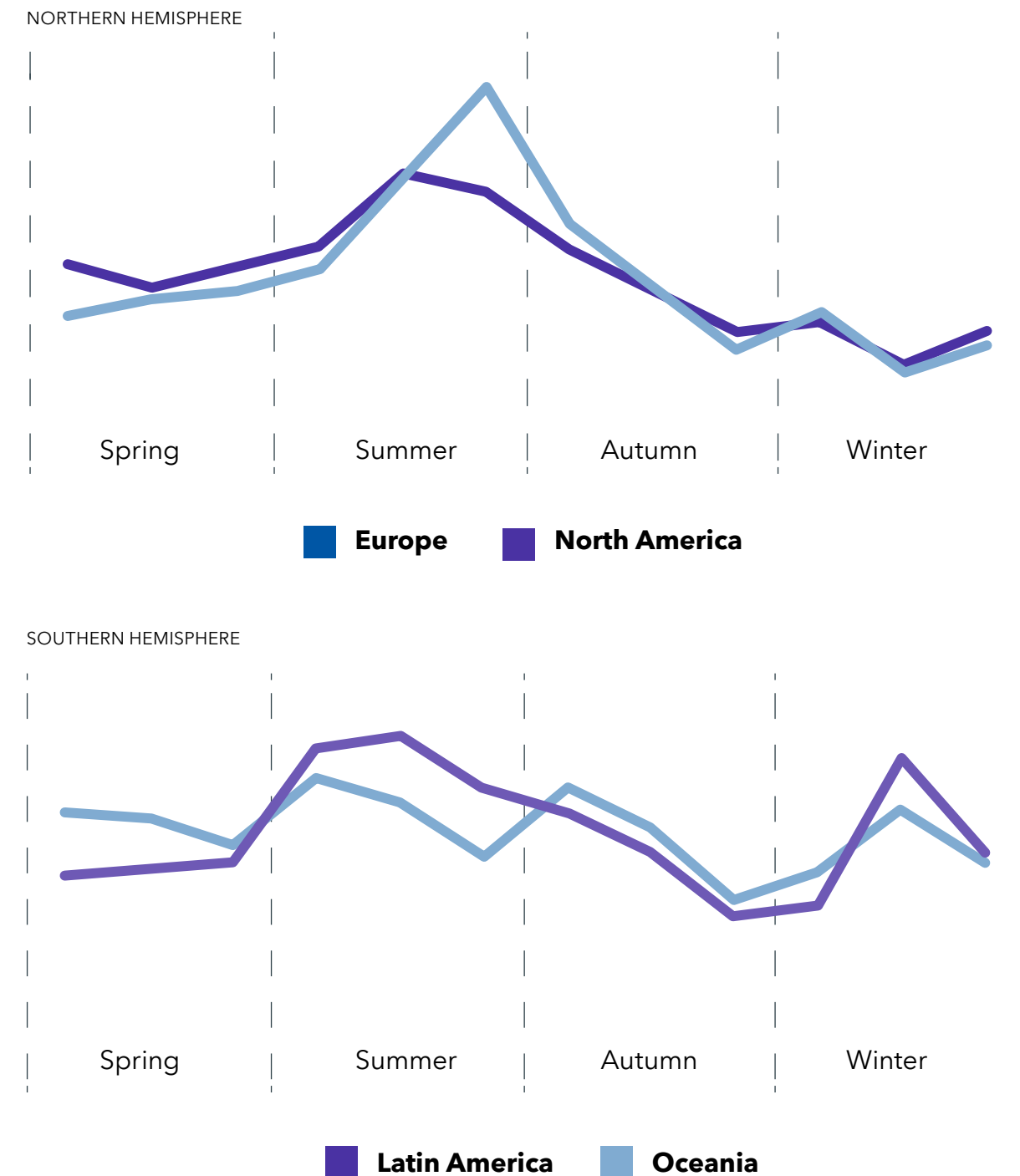
Travelers in all continents stayed on average around 3 nights, with those in Oceania slightly fewer at 2.7 nights, and those in Europe and Latin America slightly longer at 3.4 and 3.5 nights respectively.

When is the most popular time to travel?

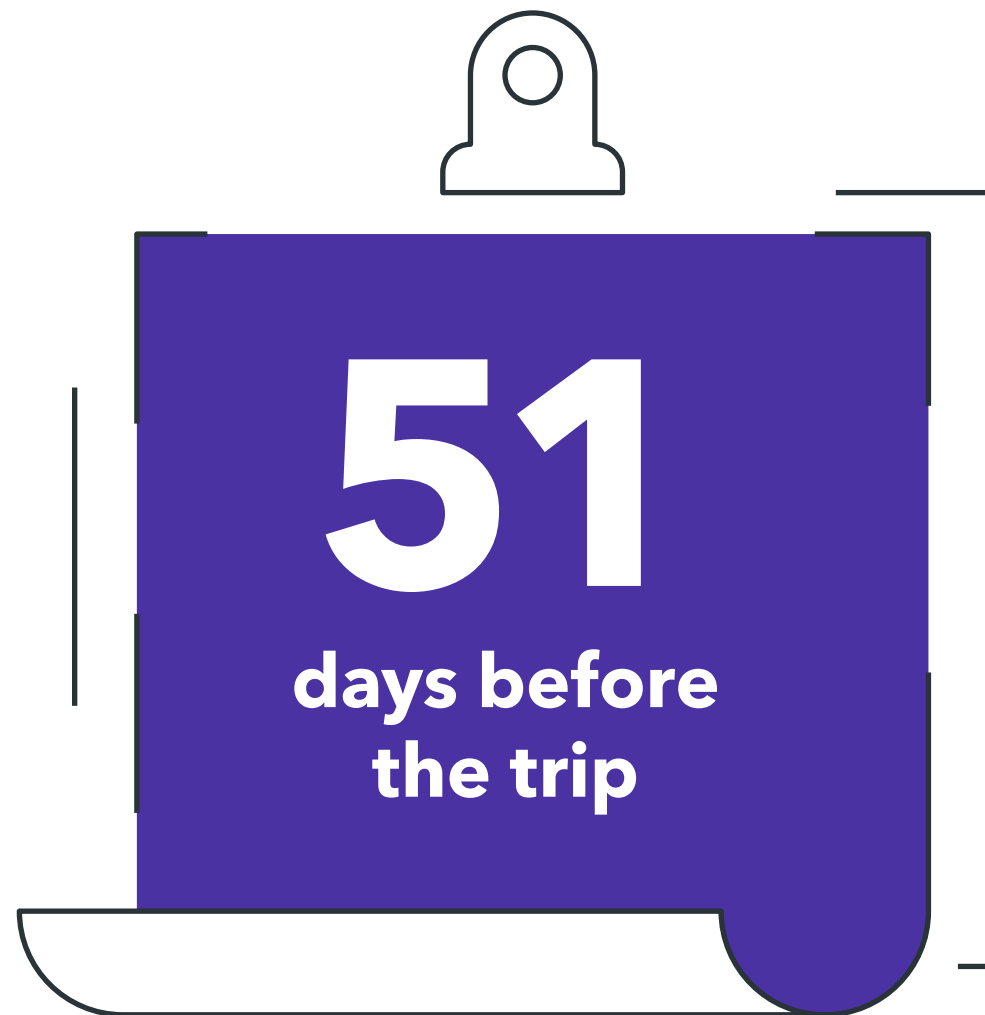
The top travel season in Europe and North America was in summer during July and August.

Latin America had two travel peaks, one in December and January, and the other in July. Oceania did not show a clear seasonality.

Europe has the most distinct seasonal travel trend, with a busy summer season



When are travelers booking?



Travelers tend to book December holidays further in advance

On average travelers booked 51 days in advance of their stay.

In all markets December travel was booked further in advance, with an average of 59 days. The busy summer period in Europe was also above average with travel booked on average 56 days in advance.

Want to know more?

Access data on your property's audience of travelers

Visitors' Profile & Rate Insights

With the Visitors' Profile feature properties can see the top 10 nationalities of potential guests, their traveler type, and how long they tend to book for.

Rate Insights reveals pricing data for hotel rates across multiple booking channels, enabling a property to benchmark its rates against competitors.

