

Tripadvisor Market Insights Austria

COMMENTS



01

Travel Trends
January - April 2022
Global and Austria

02

Traveler Sentiment
Snapshots:
Sustainability & Travel
Inflation's Effect on Travel
New Tripadvisor Research



01. Travel trends: January - April 2022

Global and Austria

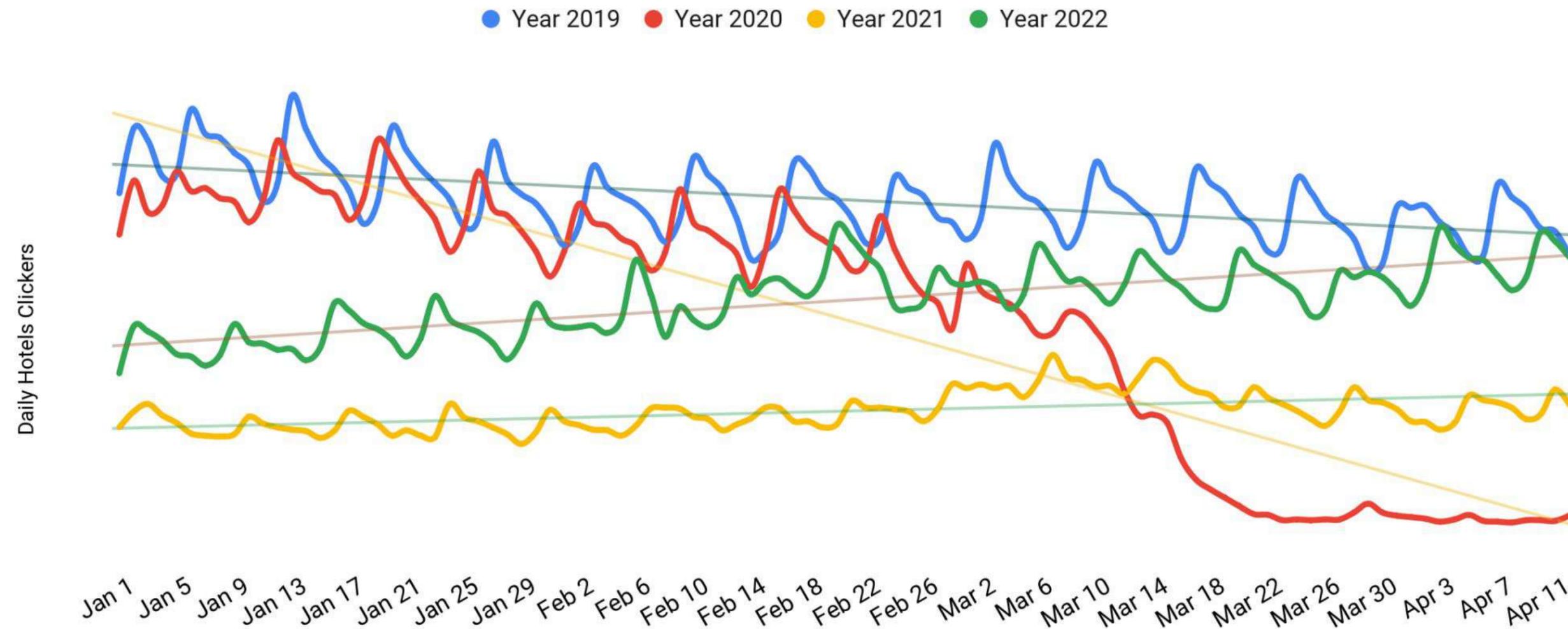


Travel intent has nearly reached 2019 levels

Today's travel optimism continues: hotels clickers have increased month over month since January, as countries reopen once again.

In 2019 (pre-pandemic), clickers decreased by **18%** from January to April. In 2022, hotels clickers have increased **+42%** between the first week of January and April.

Daily Hotel Clickers Trending over time | 2020 - 2022

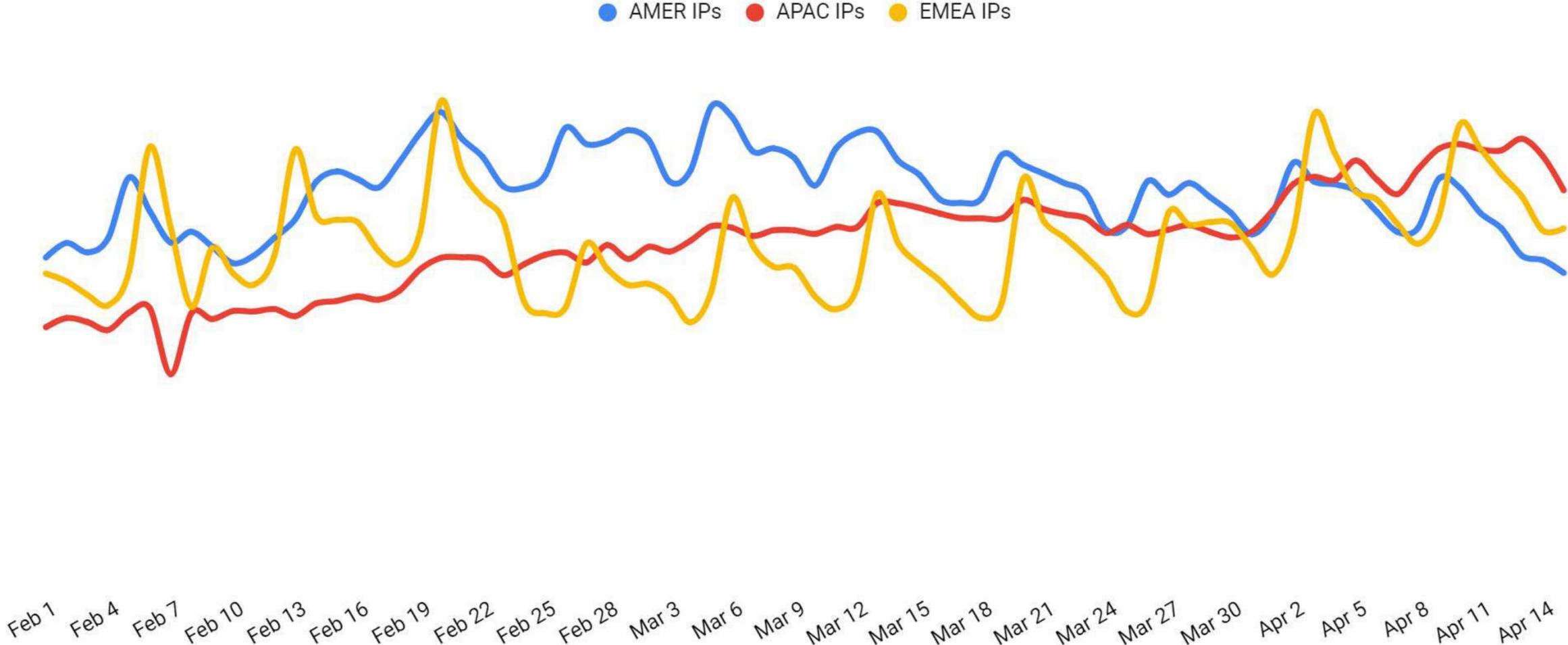


EMEA travel intent has shown consistent growth in hotels clickers in 2022

While hotels clickers in all regions increased since February 1st, the number of users clicking to book stays from APAC IPs is up by 65% since the first week of February

Daily Hotel Clickers trending by Region

APAC sits on a secondary axis due to volume difference

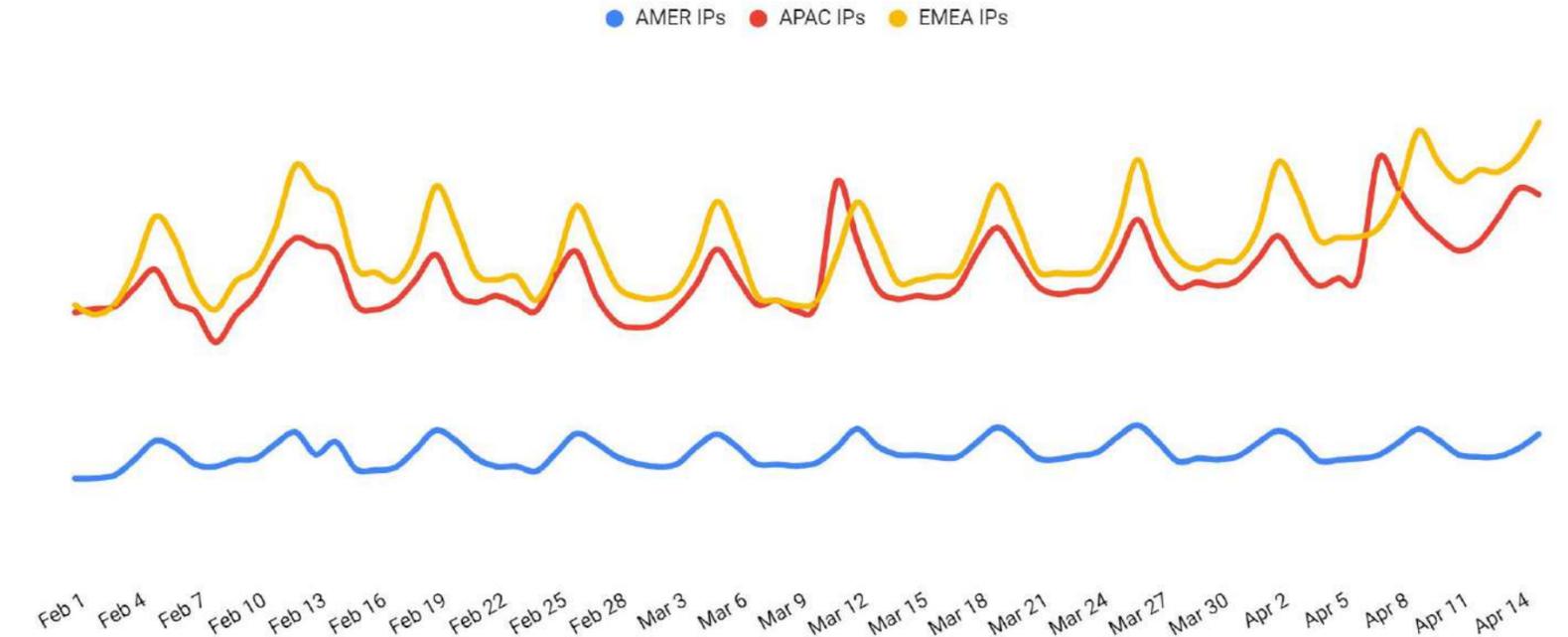


Restaurant and attractions pageviews have increased for all 3 regions, particularly for EMEA

EMEA, APAC, and Americas IPs show consistent increases in restaurants and attractions pageviews since the first week of February 1st. EMEA increases are highest at +66% for attractions, and +40% for restaurants

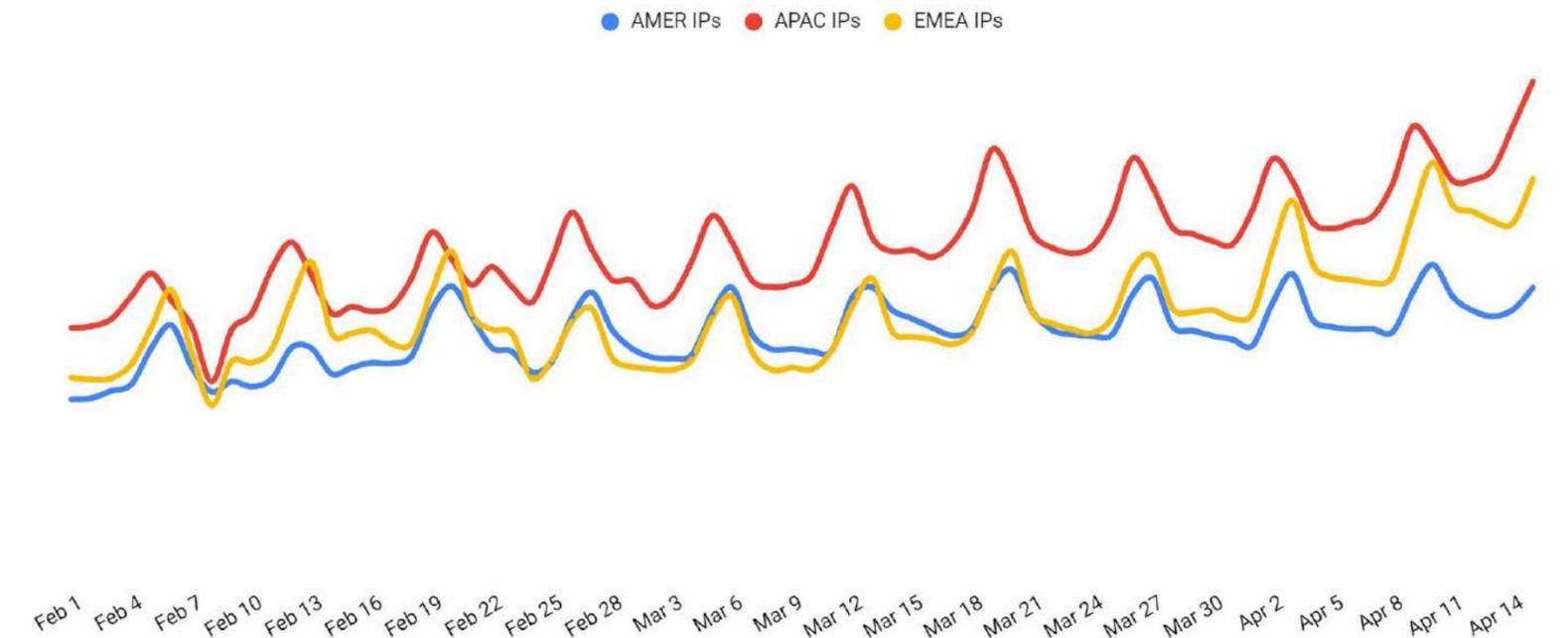
Daily Restaurant Pageviews trending by Region

APAC sits on a secondary axis due to volume difference



Daily Attractions Pageviews trending by Region

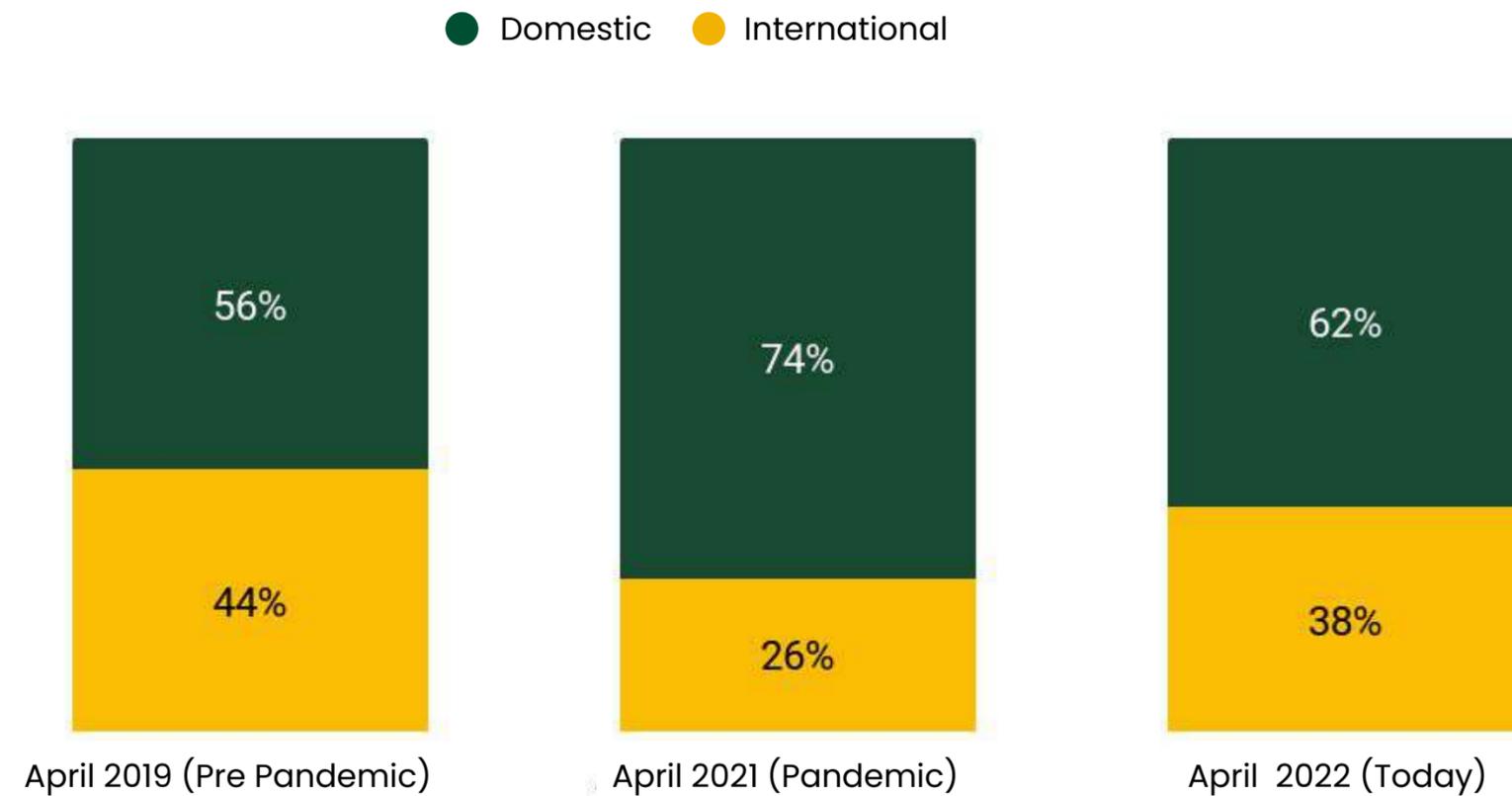
APAC sits on a secondary axis due to volume difference



Overall interest in international travel has grown by 46% YoY, getting closer to pre-pandemic levels

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

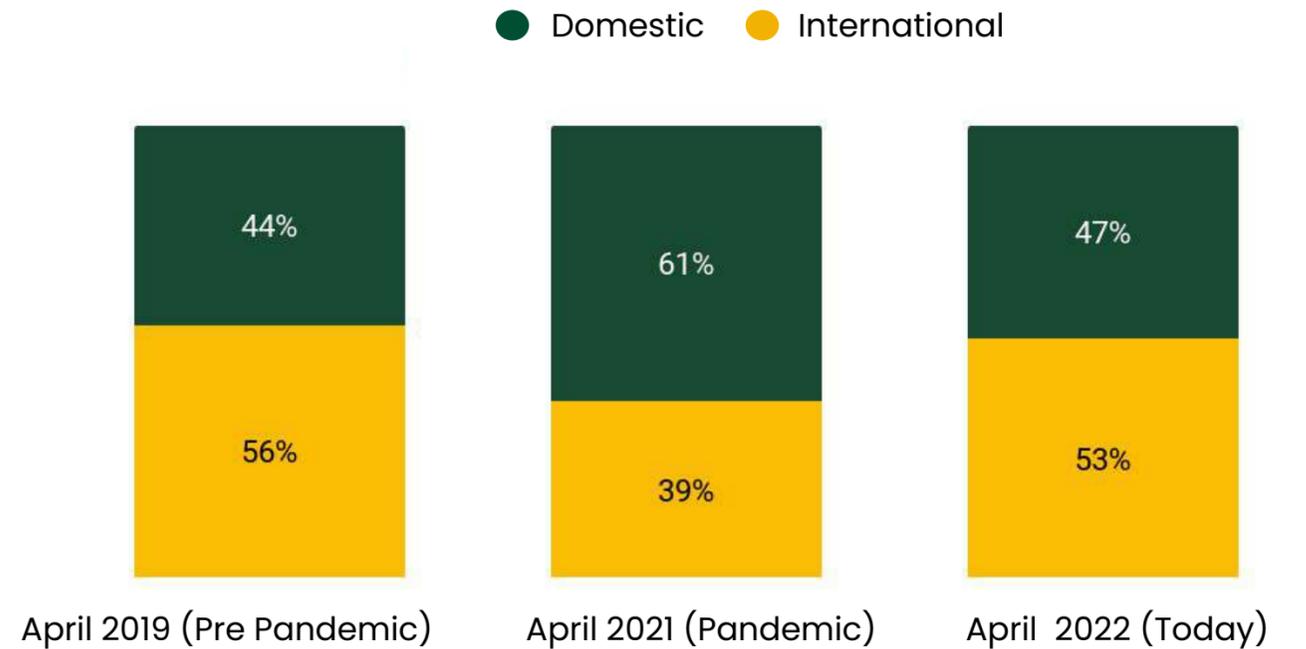


Distribution of domestic vs. international travel intent across EMEA

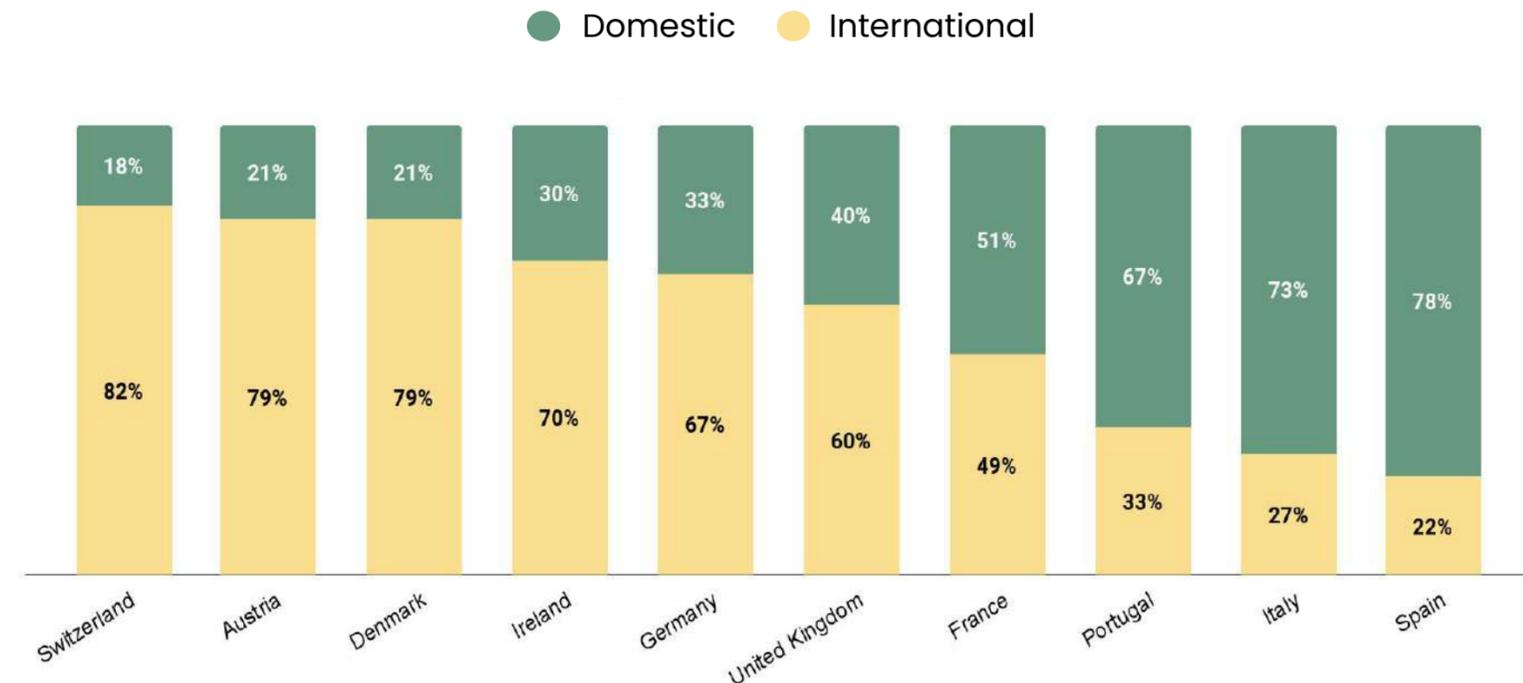
International travel intent for EMEA IPs is **recovering much faster than any other region** - more than half of today's travel is being planned to destinations abroad, and is almost back to 2019 (pre-pandemic) levels.

Of the major markets across EMEA, **users in Switzerland, Austria, Denmark and Ireland are all more keen on travelling internationally** than anyone else, with 70% or more users clicking to book international stays.

Share Distribution of Travel Intent over time | EMEA

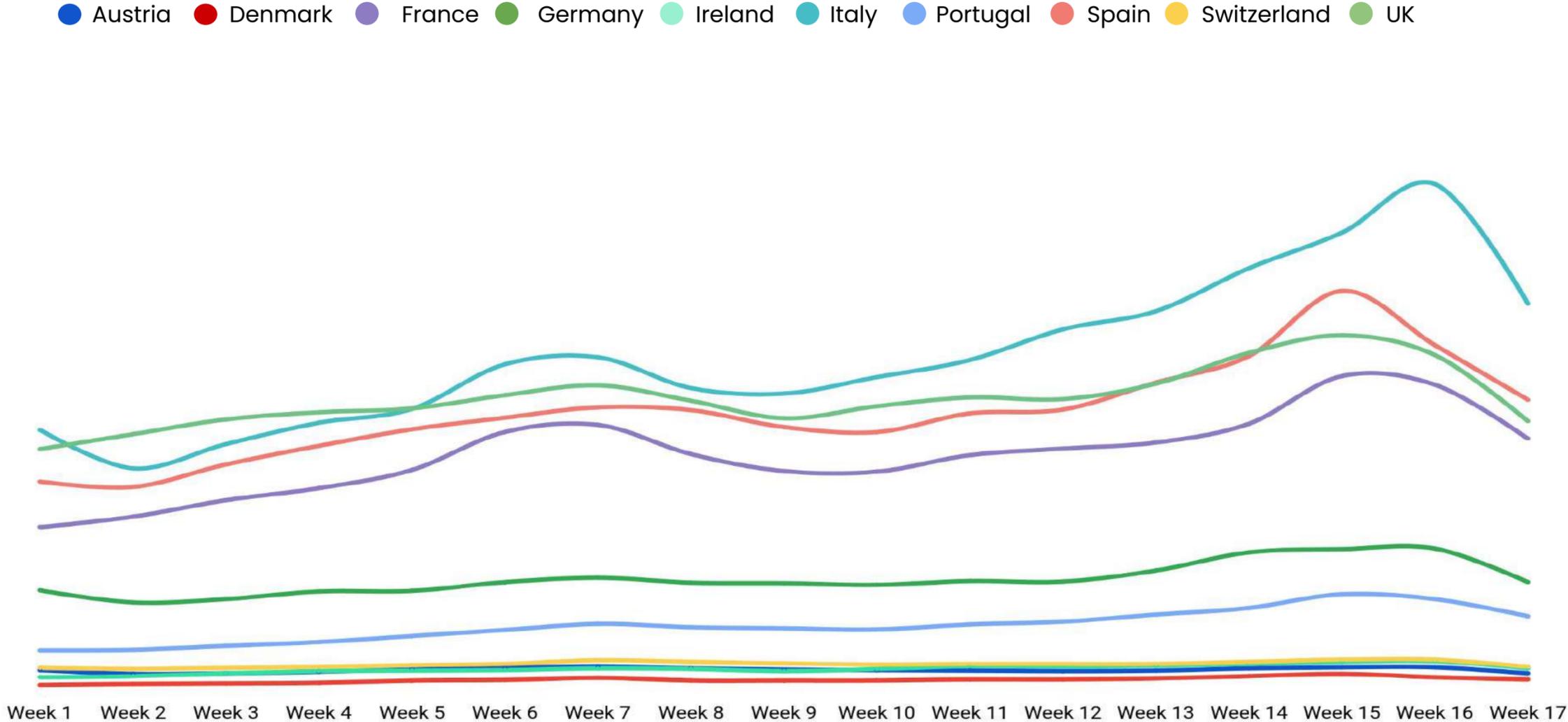


Share Distribution of Travel Intent over time | EMEA IPs | April 2022



Hotel pageviews in Austria registered an increase of +7% this April vs March 2022

Monthly Accommodations Pageviews by Market trending 2022

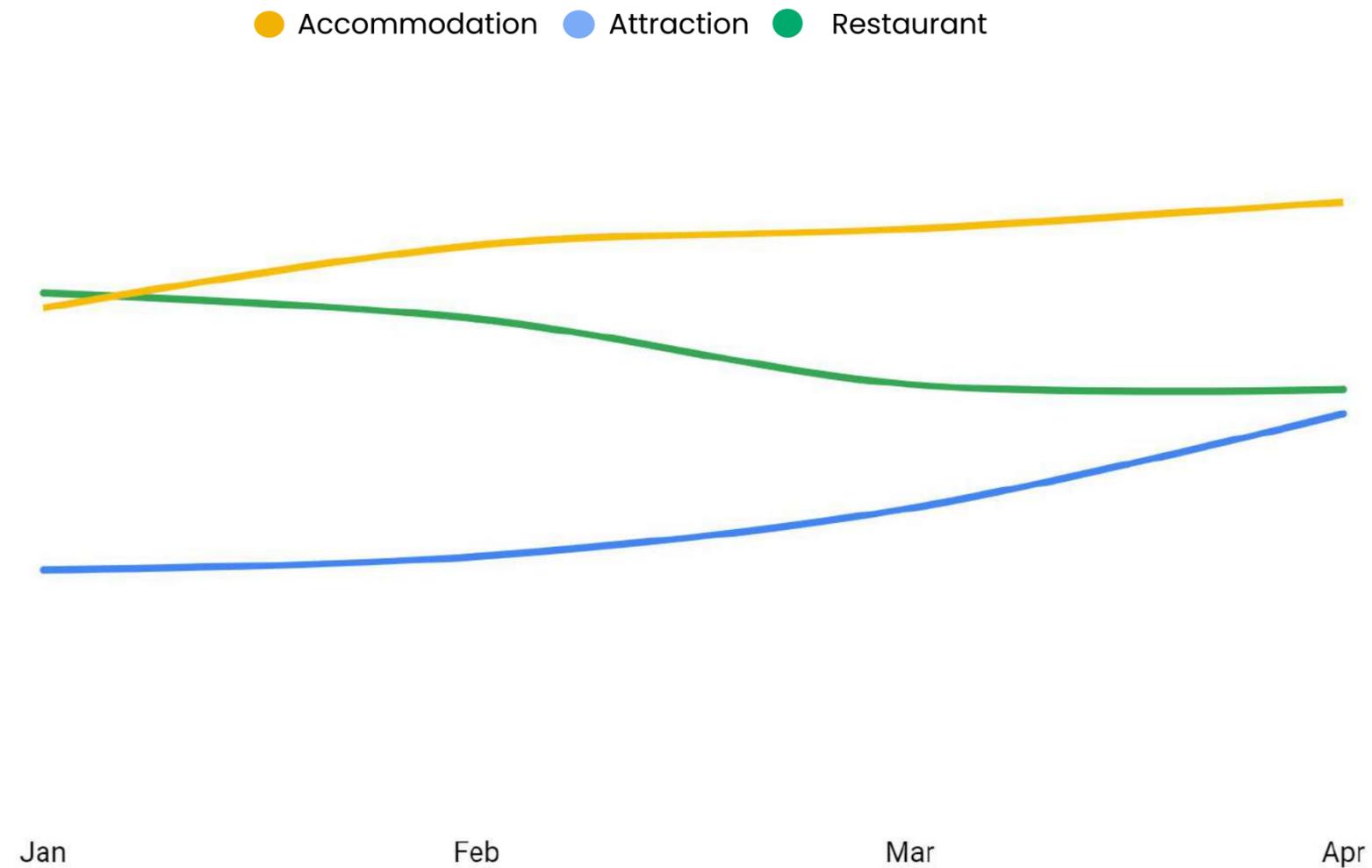


Source: Tripadvisor User Data based on Accommodation Traffic, January - April 2022

Early 2022 sees a significant return of attraction traffic

In April, attraction pageviews increased by +30% vs. March 2022, while restaurant experienced a growth of +5% when compared to March 2022. Hotel pageviews are currently -1% April vs. March.

Monthly Category Pageviews trending 2022





Vienna remains the most popular domestic destination for Austrian travellers, followed by Salzburg and Graz.

Italian destinations are in considerable demand in Austria, with Venice, Rome, Trieste and Grado on the top 15 most searched destinations.

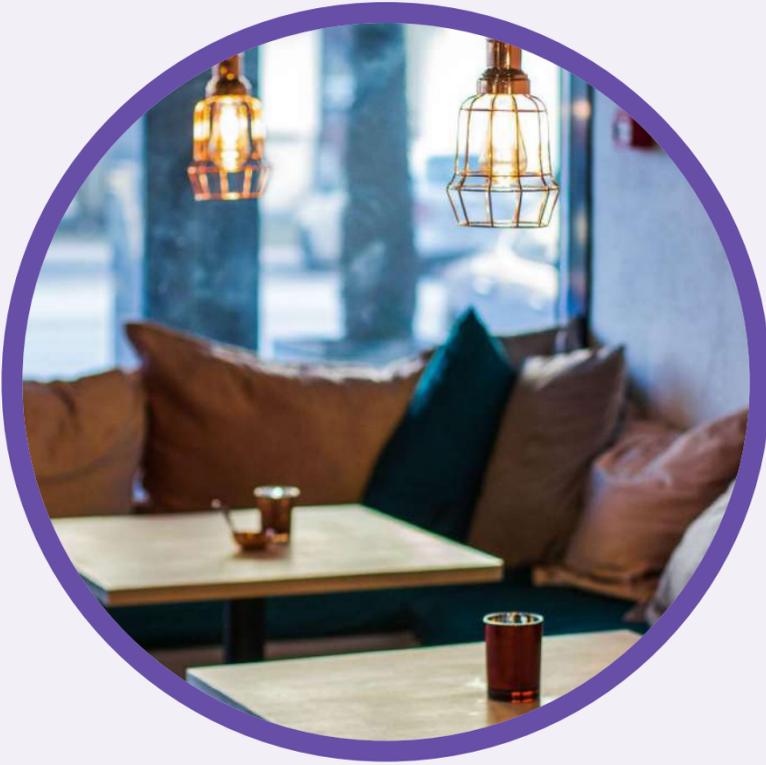
Austrian Destinations

- 1 Vienna
- 2 Salzburg
- 3 Graz
- 4 Innsbruck
- 5 Linz
- 6 Klagenfurt
- 7 Villach
- 8 Bregenz
- 9 Krems an der Donau
- 10 Baden
- 11 Wels
- 12 Gmunden
- 13 Zell am See
- 14 Kitzbuhel
- 15 Sölden

International Destinations

- Venice, Italy
- Paris, France
- Rome, Italy
- Barcelona, Spain
- London, UK
- Amsterdam, The Netherlands
- Budapest, Hungary
- Prague, Czech Republic
- Munich, Germany
- Trieste, Italy
- Lisbon, Portugal
- Dubai, United Arab Emirates
- Istanbul, Turkey
- Grado, Italy
- Berlin, Germany

POPULAR DESTINATIONS



'**Free Breakfast**' continues to be the most popular filter used on Tripadvisor when choosing a property in Austria, followed by '**4 Bubbles and Up**', as testament of the importance of positive reviews on Tripadvisor. Following selections are '**Hotels and Motels**' and '**Pool**'.

Popular Filters

- 1 Free Breakfast
- 2 4 Bubbles and Up
- 3 Hotels & Motels - Lodging Type
- 4 Pool
- 5 All Inclusive - Parent
- 6 5 Star
- 7 4 Star
- 8 Free Cancellation
- 9 Beach
- 10 Free Wifi

POPULAR FILTERS

Top 10 countries looking at Austria

Ranked #1

41%

of all Austrian accommodations pageviews are from travellers in **Austria** (April)

Top 10 Countries

- 1 Austria
- 2 Germany
- 3 Italy
- 4 United Kingdom
- 5 United States
- 6 The Netherlands
- 7 Switzerland
- 8 France
- 9 Israel
- 10 Spain

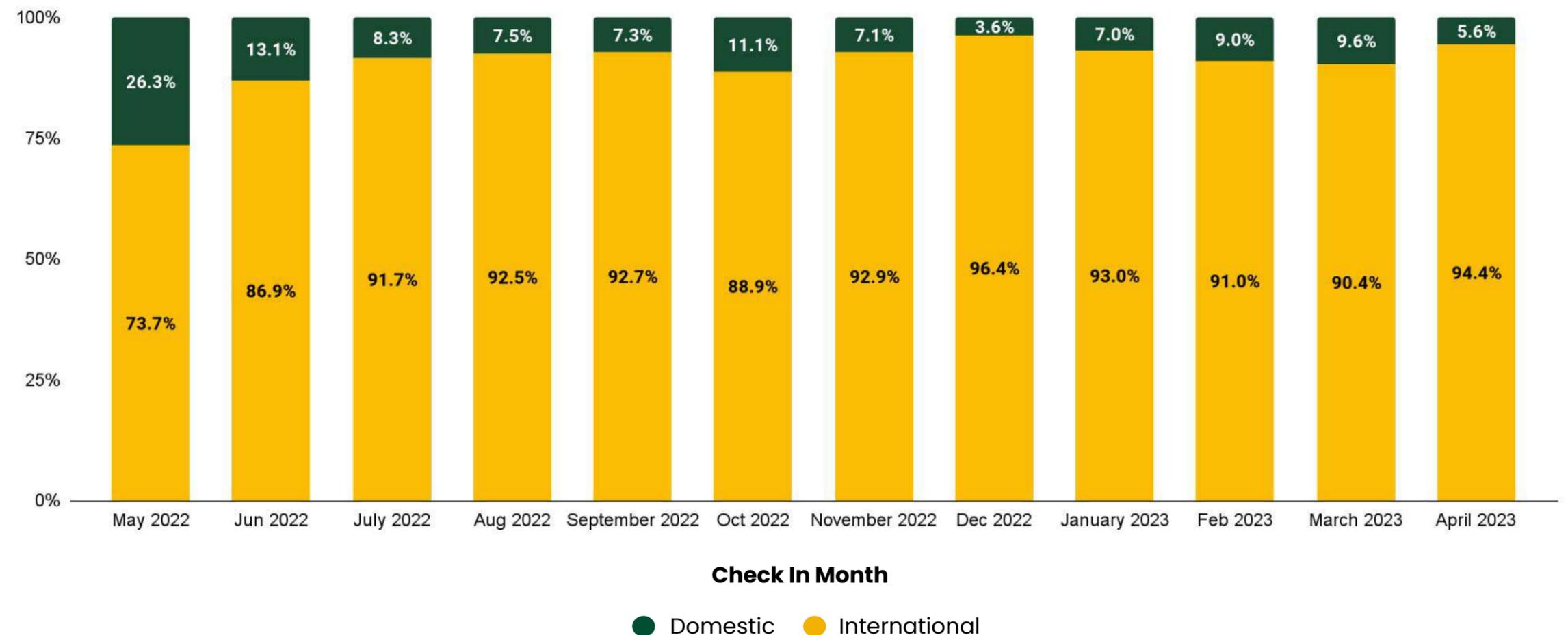
More than 70% of travels being booked by Austrian users for the upcoming months are to international destinations

How to read this chart:

Domestic: 26% of all consumers clicking to book stays this month (May 2022) are looking at domestic destinations

International: 74% of all consumers clicking to book stays for May 2022 are planning to travel internationally

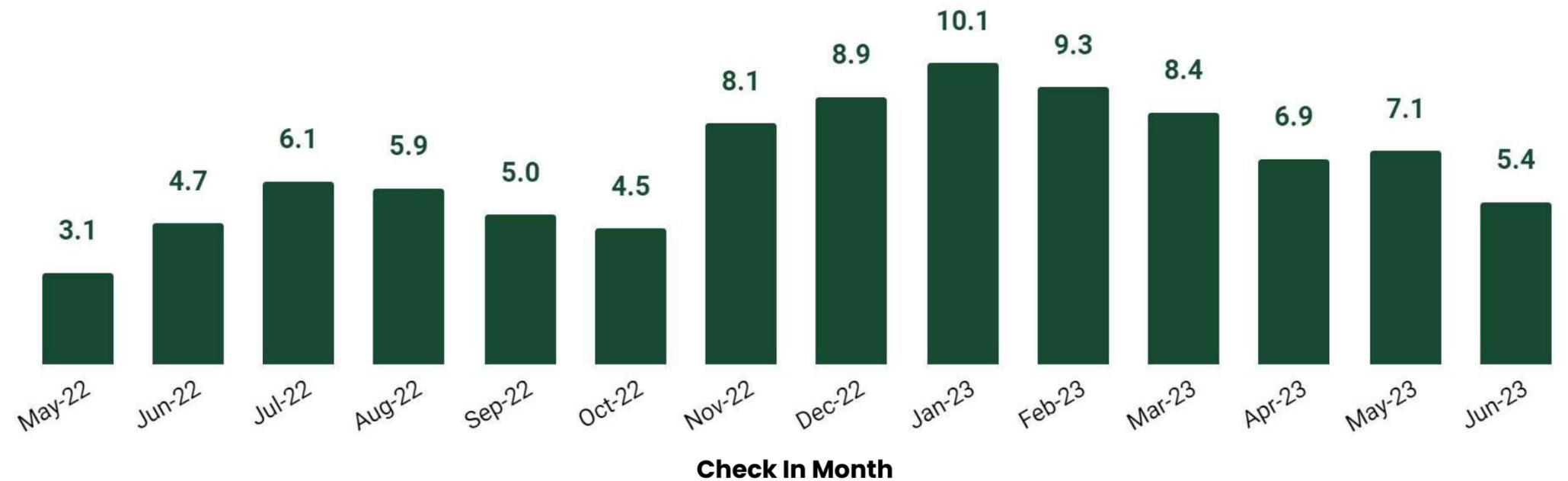
Distribution of travel intent by check-in month: domestic vs international
Data based on Austrian IPs, data based on users searching for hotels > Jan 1, 2022



Austrian travellers are most eager to book longer stays in the second part of 2022

May and June 2022 are still months for weekend getaways for Austrian travellers, with the second part of the year experiencing an increase in average length of stay as Austrians are planning to book longer trips, with a peak of 10.1 nights in January 2023.

Countries IPs Searches from Jan 2022



Looking ahead to December 2022 and comparing with July 2022 we can see increase in average length of stay and increase rates



46%

Length of stay increase over time, with July 22 /Dec 22

July 2022 - 6.1
Dec 2022 - 8.9

140%

Average room rate also increases over time with July 22 /Dec 22

Sights & Landmarks are the most popular type of attraction among travellers in Austria

- 1 Schönbrunn Palace, Vienna
- 2 Belvedere Museum, Vienna
- 3 Historic Center of Vienna, Vienna
- 4 Vienna Naschmarkt, Vienna
- 5 Salzburger Altstadt, Salzburg
- 6 Kunsthistorisches Museum Vienna, Vienna
- 7 The Hofburg, Vienna
- 8 Prater, Vienna
- 9 Small-Group Day Trip from Vienna to Hallstatt, Vienna
- 10 OBB, Vienna
- 11 Mariahilfer Strasse, Vienna
- 12 Haus des Meeres - Aqua Terra Zoo, Vienna
- 13 Tiergarten Schoenbrunn - Zoo Vienna, Vienna
- 14 Stephansplatz, Vienna
- 15 Achensee, Maurach

22%

of all pageviews are for the category: Sights & Landmarks, followed by Outdoors, Nature & Parks (16%) and Museums (14%).



TOP 15 ATTRACTIONS

02. Traveler Sentiment Snapshots:

Sustainability & Travel Inflation's Effect on Travel
New Tripadvisor Research





Sustainability & Travel



65% of respondents feel that sustainable travel is more important than it was pre-pandemic

Q: Do you feel sustainable travel is more or less important compared to 2019 (i.e., before the pandemic started)?

Sustainability Importance Sentiment, All Markets

Markets: AU, JP, SG, UK, US

35%

Much more important

30%

Slightly more important

28%

About the same

4%

Slightly less important

3%

Much less important



Half of respondents cite the availability of local foods as top sustainable feature when choosing an accommodation

Q: Which sustainable features, if any, are important to you when booking an accommodation (e.g., hotel, vacation rental)? Select all that apply.

Sustainability Importance Sentiment, All Markets

Markets: AU, JP, SG, UK, US

Sustainable Features	Percentage
Availability of local food	50%
Use of environmentally-friendly cleaning products	44%
No single-use plastic	36%
Smart showers and room sensors to minimize water and electricity usage	36%
Green infrastructure (e.g., solar panels)	32%
Encouraging towel reuse	31%
Advertised recycling program	27%
Zero carbon/carbon offsetting	27%
Electric car charging	20%
None of the above	16%



Almost 1/5 of respondents are still not sure whether to worry about their carbon footprint when planning travel

Q: Do you worry about your carbon footprint when travelling or planning travel?



36% No



18% Not sure

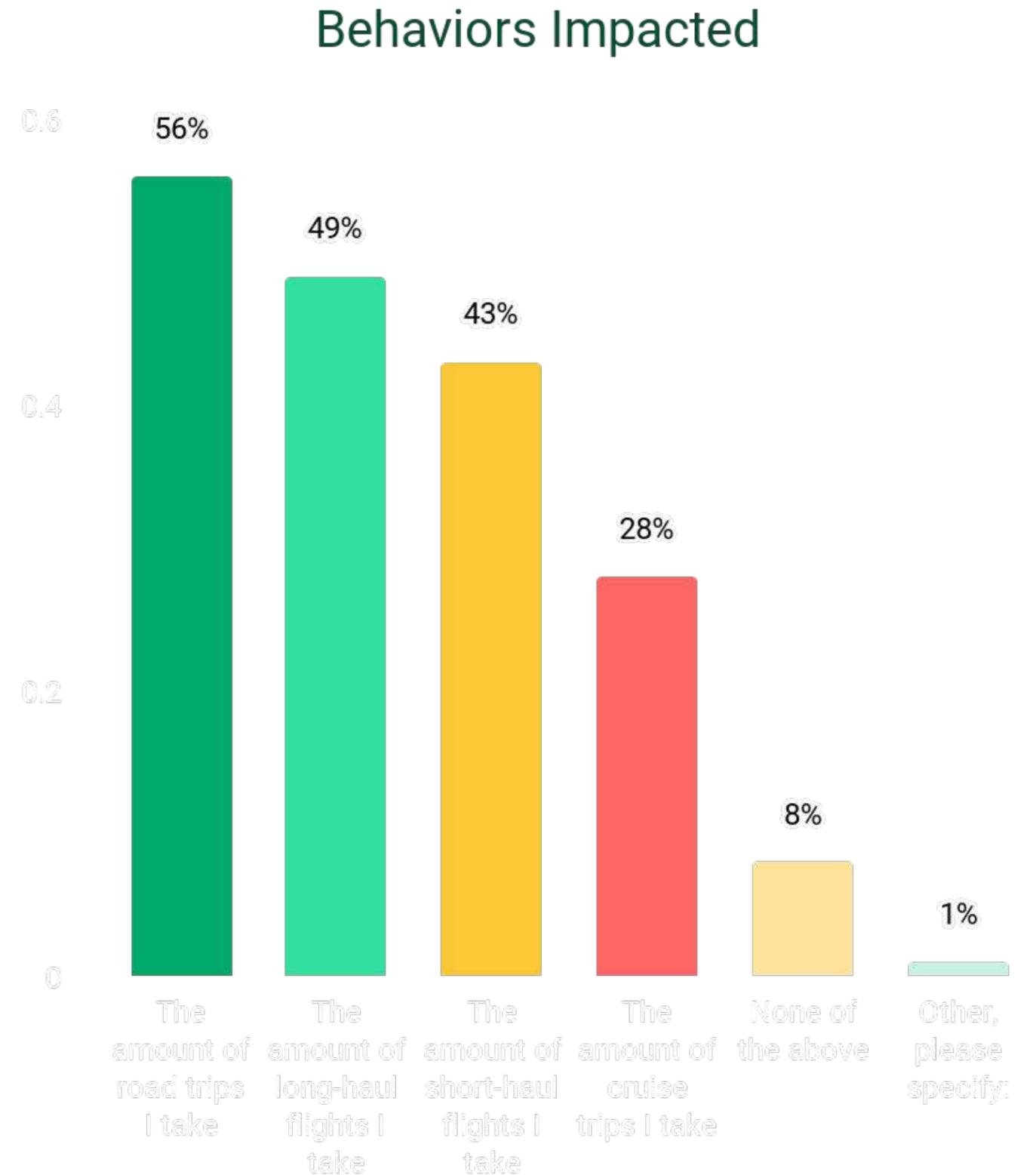


Yes 45%



56% of respondents that worry about their carbon footprint say it affects the amount of road trips they take, followed by the amount of flights

- The amount of road trips I take
- The amount of long-haul flights I take
- The amount of short-haul flights I take
- The amount of cruise trips I take
- None of the above
- Other, please specify:



Concern about sustainability hasn't always translated into action when planning travel

59%

of respondents have not yet spent more on travel in order to travel more sustainably

26% said they have; **15%** are not sure

Q: Have you ever spent more on travel in an effort to lower your carbon footprint (i.e., travel more sustainably)?





Markets: AU, JP, SG, UK, US

But those surveyed say they plan to change that

65%

of respondents would be willing to spend more to travel sustainability in the future

Q: In the future, how much more would you be willing to spend on sustainable travel options (environmentally-friendly hotels, etc.)?

Source: Tripadvisor & Qualtrics; N=2,141; Australia, Japan, Singapore, United Kingdom, United States; April 2022



A full 85% of respondents say they practice some sustainable habits while traveling

Eating and shopping locally top the list of sustainable habits for those traveling

Q: Which sustainable habits do you practice when travelling or planning travel? Select all that apply.

Sustainable Habits During Travel

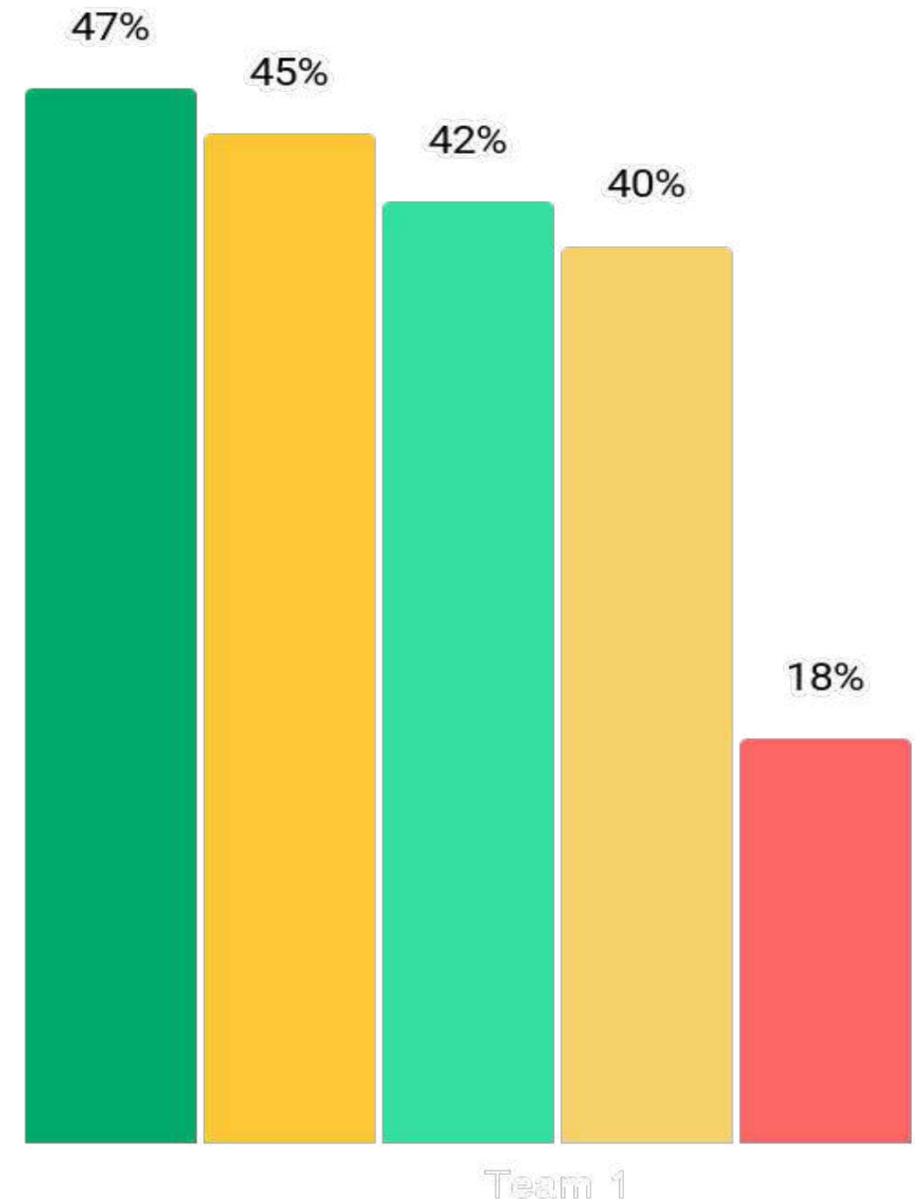
Sustainable Habits During Travel	Percentage
Eat and shop locally in my destination	52%
Travel closer to home	40%
Take trains or other forms of public transport	40%
Proactively canceling daily room service	24%
Book eco-friendly tour operators	19%
Avoid destinations that require a flight	18%
Book eco-conscious or eco-certified accommodation	18%
None of the above	15%
Purchasing carbon offsets	12%
Other, please specify:	0%



Respondents would like some help in choosing more sustainable travel options

Almost half cite information about sustainability in travel reviews, followed by an industry scoring or rating system

Sustainable Travel Help



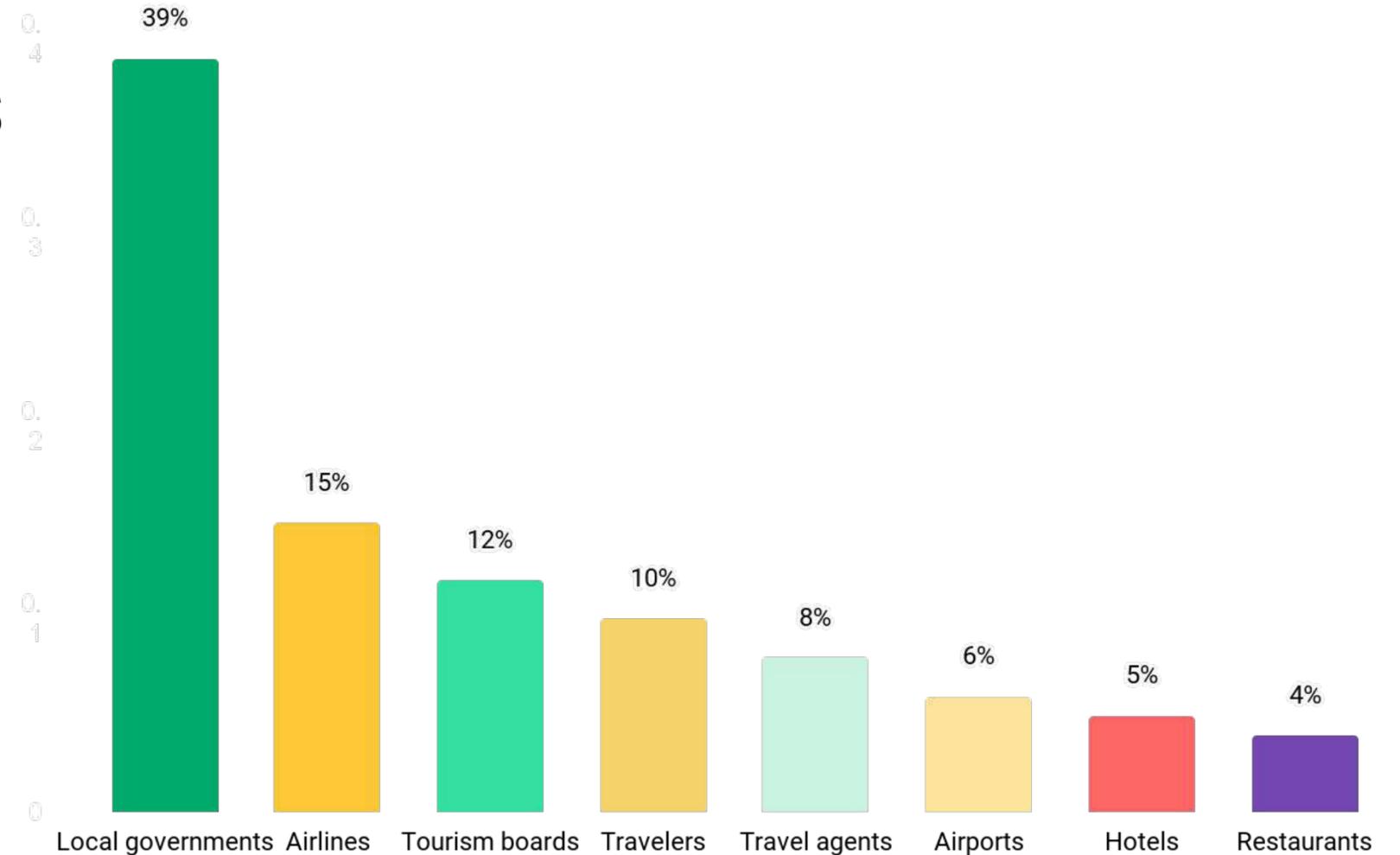
- Information about sustainable practices in travel reviews
- Scoring or rating systems by industry (similar to hotel star class or restaurant Michelin ratings) to identify businesses with the best sustainable operations
- Badges for eco-minded businesses on booking websites like Google, Expedia or Tripadvisor
- Eco-certifications for travel businesses (e.g., Leed certified, Green Seal or Green Globe ratings)
- None of the above
- Other, please specify:



Respondents think that the main responsibility to ensure sustainable travel practices rests with local governments

Q: Who do you feel is most responsible for ensuring businesses within the travel industry follow sustainable practices? Rank in order of level of responsibility, with 1 being the most responsible party. A: Those ranked first listed

Ranked 1st in Responsibility for Sustainable Travel Practices

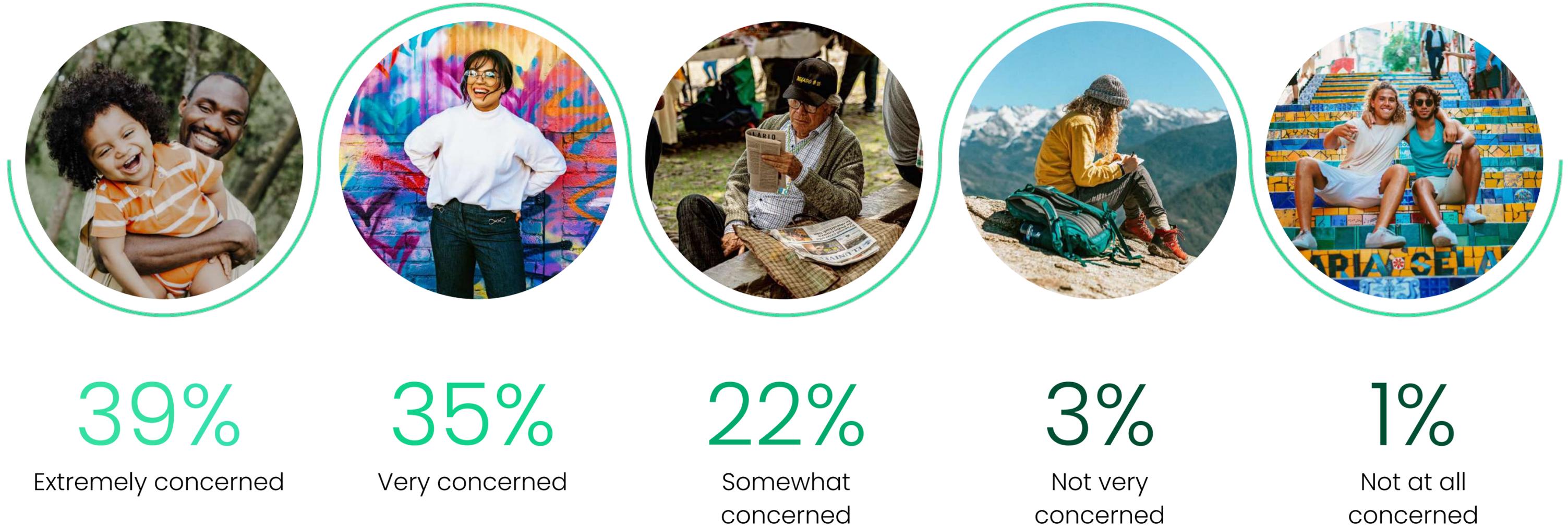




Inflation & Travel

Inflation is a significant concern for most respondents

Q. How concerned are you about inflation, including the rising costs of goods and services?



And continuing inflation will likely impact spending non-essential habits



Markets: AU, JP, SG, UK, US

45%

Would spend slightly less on non-essential things

34%

Would spend significantly less on non-essential things

15%

Would practice the same spending habits

6%

Not sure

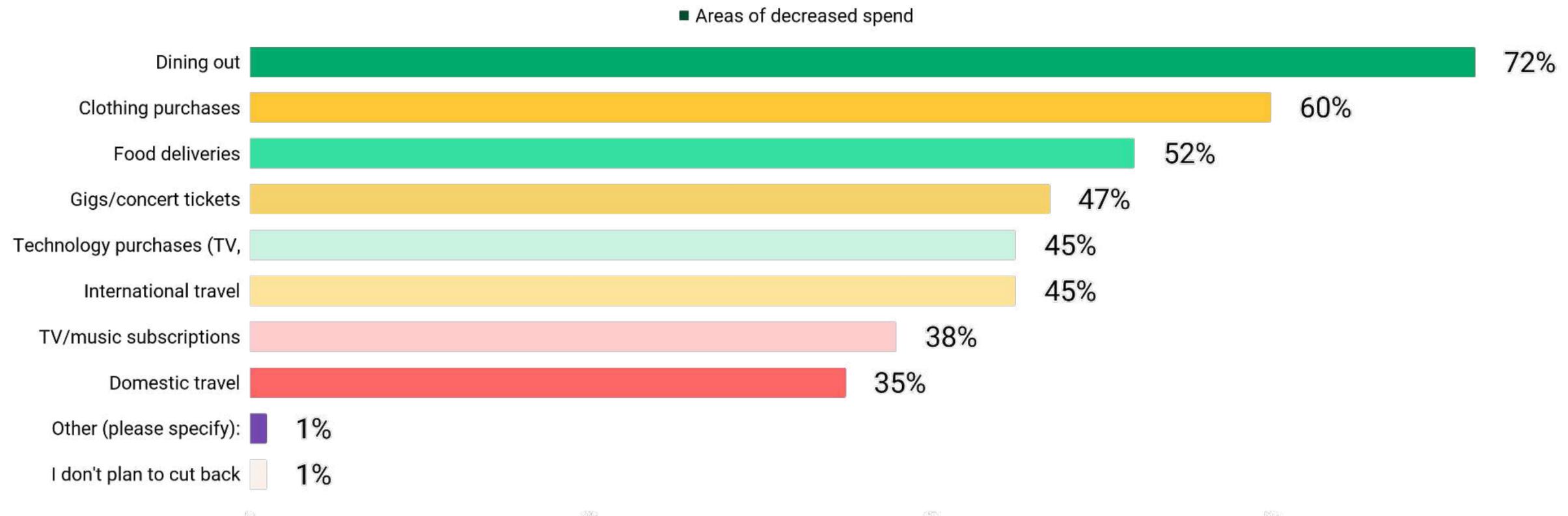
Q: If consumer prices continue to rise over the next 3-6 months, how would it impact your non-essential spending habits?



When it comes to cutting non-essential spend, dining out tops the list

On the other hand, less people plan cuts to domestic travel, TV/music subscriptions, and international travel than other options

Q: You said that you would decrease your non-essential spending habits if consumer prices continue to rise. In which areas would you spend less? Select all that apply.



95% of those surveyed would sacrifice some non-essentials in order to fund their next vacation

From cutting down on nights out to phone upgrades and music subscriptions, future travelers are determined despite rising costs and inflation

Q: Which of the following would you be willing to sacrifice in order to save for your next vacation? Select all that apply.

Areas of decreased spend

Selected Choice	Percentage
Nights out	57%
Ordering food deliveries	56%
Dining out at restaurants	50%
Entertainment (attending gigs/concerts)	50%
Gym membership	50%
Buying new clothes	46%
Upgrading my cell/mobile phone	45%
Home renovations/improvements	39%
TV/music subscriptions	34%
None of the above	5%



In spite of inflation, travel remains a top priority



85%

of respondents plan on traveling this year

A full **36%** of respondents plan to travel **more** this year than the last

29% of respondents will travel about the same

20% of respondents plan to travel less

Q: Do you plan to travel more or less than last year?



THANK
YOU

