



get the truth. then go.®

**TripAdvisor: the world's largest travel community
pioneering the Web 2.0 travel revolution**

**Lorenzo Brufani, portavoce di TripAdvisor in Italia
Destinazione Italia 2020 - Torino, 30 Gennaio 2009**

Web 2.0: world overview



Unstoppable growth:

- in 2007 the on-line market accounts for the **30% of world's sales** (+ 26% vs 2006)*
- the worldwide digital universe in 2007 is composed of **281 billions of Gigabyte****
- **an average growth of 60% per year** is expected from 2008 to 2011**



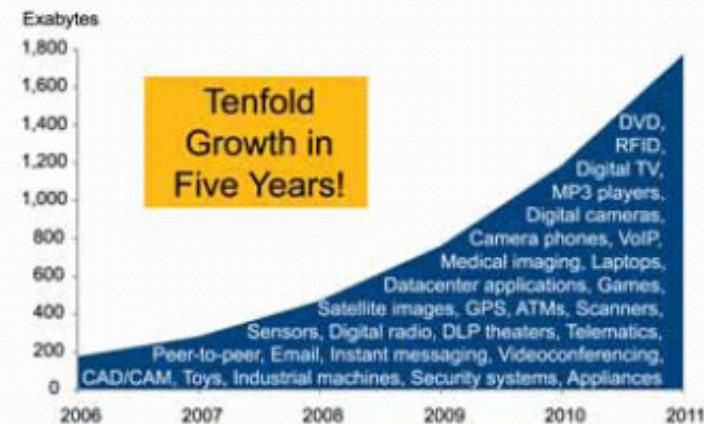
Growing value:

- during 2007 the USA invested 86 billion dollars on social networking and Web 2.0 tourism*.
- the investments foreseen for 2009 are about 90 billion dollars *

* Source: BitLab, October 2008

Figure 1




Digital Information Created, Captured, Replicated Worldwide



Source: IDC, 2008

** Source: IDC, April 2008

Web 2.0: Italy overview

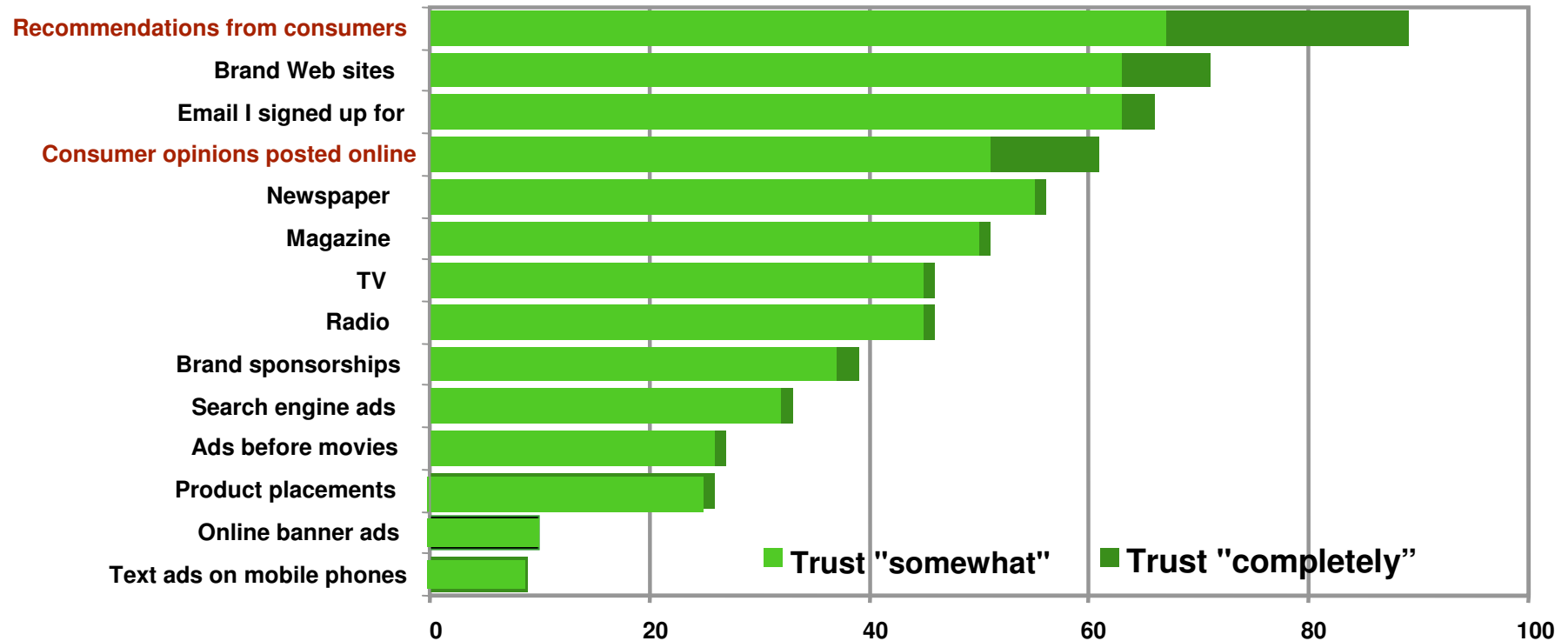
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-  **Italy ranks 6th among the Web 2.0 countries*:**
 - 11 million of Internet users – 56% of Italian Internautes – visit Web 2.0 sites**
 - 8 million of users belong to Web 2.0 communities*
 - 4,4 million of bloggers
 - 5 million of heavy users are driving the boom of Web 2.0 in Italy
 -  **Italy is the most viewed travel destination on the Web***
 -  **In our country there is the higher inconsistency between the hotel information you find on-line and the real hotel features'**
 -  **The Italian “Internet oriented” population is mainly composed of men, aged between 18 and 34****

* Source: BitLab, October 2008

** Source: Nielsen Netratings, January 2007





Recommendations from Consumers Generate Highest Levels of Trust

"Indicate your overall level of trust in the following forms of advertising"






Base: 470 responses recruited from PlanetFeedback.com members.
Source: Forrester Research Inc. and Intelliseek.

TripAdvisor at a glance

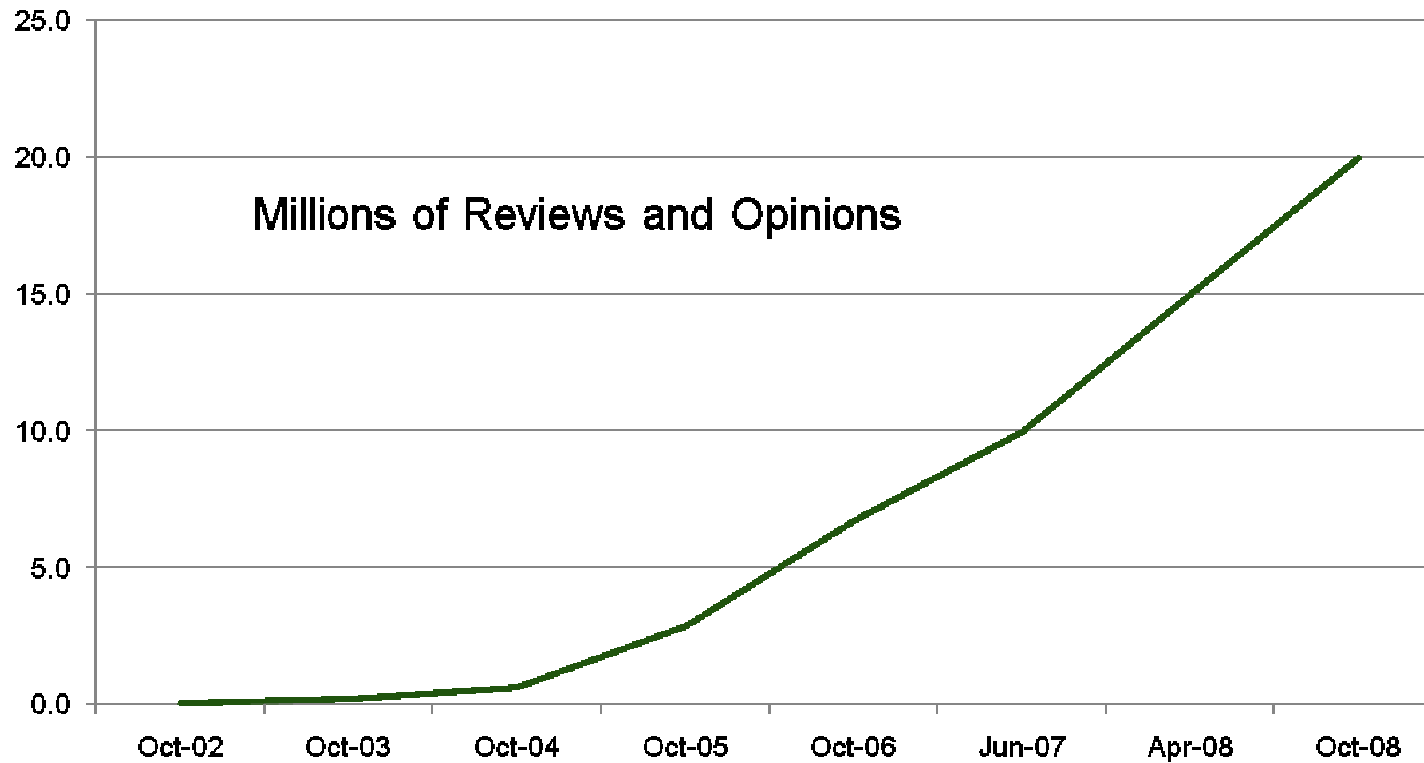
-  TripAdvisor was **founded** by Steve Kaufer in **February 2000** with the mission to “*help people around the world plan and have the perfect trip*”
-  The site was launched in November 2000 and acquired by IAC/Expedia in 2004
-  After two years of “beta” testing, **TripAdvisor made its official debut in Italy in 2007.**
-  **The TripAdvisor Media Network reaches 3 million visitors per day**
 - Only Expedia has more traffic
 - Averages over 1 million leads a day to our partners
 - **50% of TripAdvisor’s audience live outside of the USA.**
 - **30% of our revenue is generated from our European domains**

TripAdvisor at a glance

-  The world's largest travel community with more than **25 million unique monthly visitors** and **10 million registered users**
-  **20 million+ unbiased reviews**, opinions and recommendations from real travelers (*"The good, the bad and the ugly of travel destinations, hotels and tourist attractions"*)
-  These travelers contribute content on:
 - 61,000+ cities
 - 300,000+ hotels
 - 78,000+ attractions
 - 435,000+ restaurants
 - 1,380,000+ travellers' photos covering 81.700 hotels

Source: comScore

Rapid Content Growth Fueled by Organic Traffic Growth



TripAdvisor Media Network: 13 web sites, 32 Million Unique Monthly Visitors



We're the only site that lists low airfares on all airlines, including Southwest. And we include special fares that you can only buy on the airlines' own sites.



Source: comScore



TripAdvisor at a glance

TripAdvisor operates in the U.S. (<http://www.tripadvisor.com>), in the U.K. (<http://www.tripadvisor.co.uk>), in Ireland (<http://www.tripadvisor.ie>), in France (<http://www.tripadvisor.fr>), in Germany (<http://www.tripadvisor.de>), in Italy (<http://www.tripadvisor.it>), in Spain (<http://www.tripadvisor.es>), in India (<http://www.tripadvisor.in>) and Japan (<http://www.tripadvisor.jp>).



... following the owl's tide...





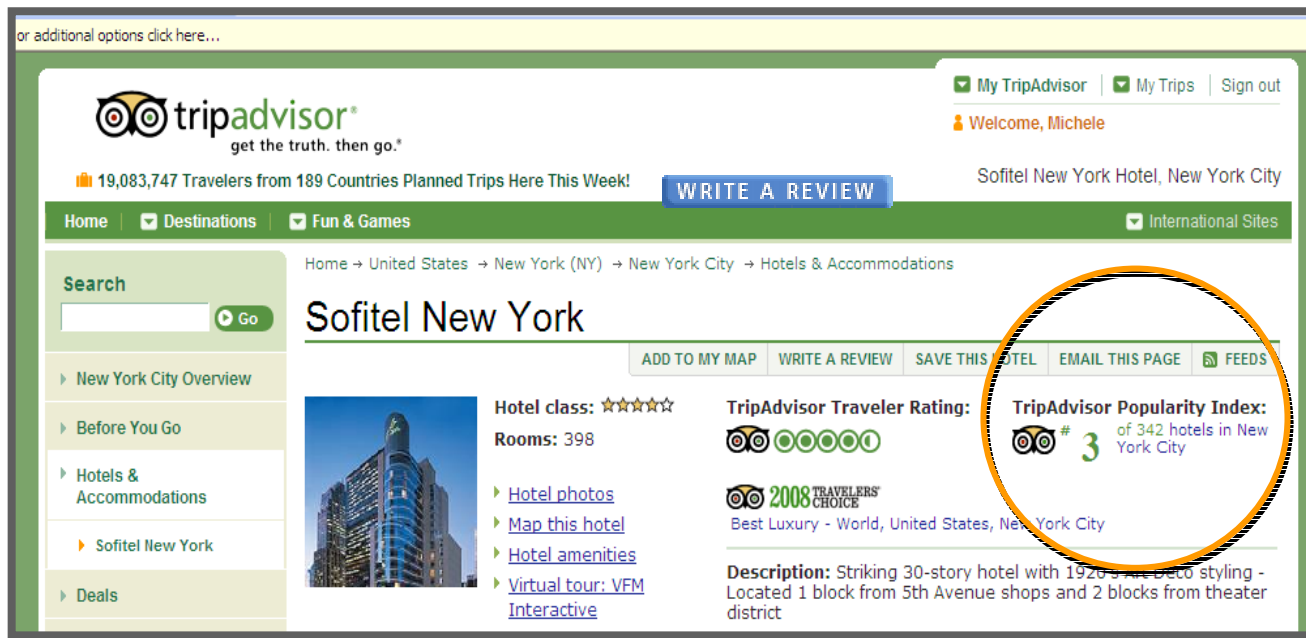
TripAdvisor in Italy

- 🦉 500.000 visitors per week.
- 🦉 2.7 million page views per week.
- 🦉 for TripAdvisor **Italy ranks soon after Usa and Uk as the most relevant non-English speaking market.**
- 🦉 each minute, 3 new reviews are written by Italian users.



TripAdvisor's Popularity Index

-  Unique rating of hotels.
-  Proprietary algorithm draws data from an array of sources: traveler reviews, web articles, etc.



or additional options click here...

My TripAdvisor | My Trips | Sign out

Welcome, Michele

Sofitel New York Hotel, New York City


19,083,747 Travelers from 189 Countries Planned Trips Here This Week! [WRITE A REVIEW](#)


Home | Destinations | Fun & Games | International Sites

Home → United States → New York (NY) → New York City → Hotels & Accommodations

Sofitel New York

[ADD TO MY MAP](#) [WRITE A REVIEW](#) [SAVE THIS HOTEL](#) [EMAIL THIS PAGE](#) [FEEDS](#)

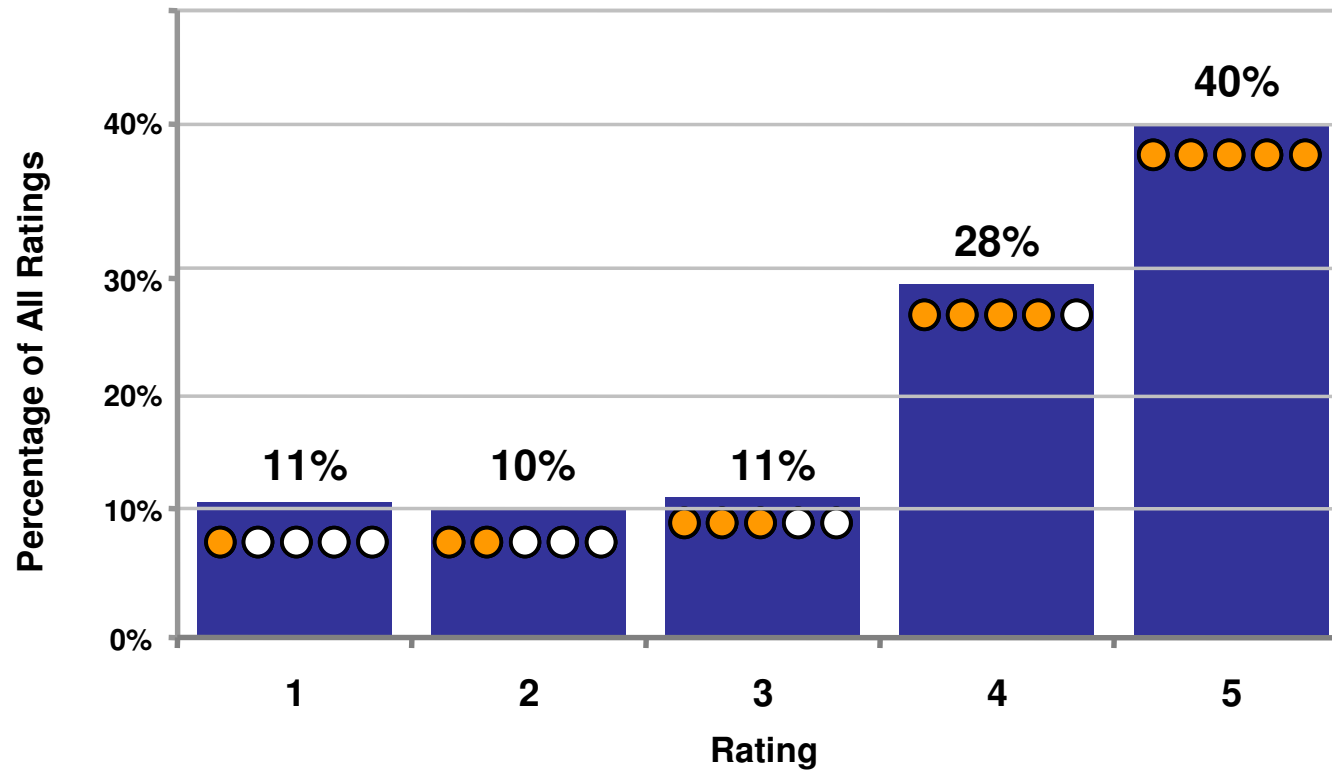
TripAdvisor Popularity Index:
 # 3 of 342 hotels in New York City

TripAdvisor Traveler Rating:


2008 TRAVELERS' CHOICE
Best Luxury - World, United States, New York City

Description: Striking 30-story hotel with 1920s Art Deco styling - Located 1 block from 5th Avenue shops and 2 blocks from theater district

TripAdvisor Reviews Are Largely Positive



Why are we different...

TripAdvisor offers:

- **Real advice from real travellers:** an affordable and unbiased travel consultant collecting the honest reviews of million of travellers like you that have already been to your next travel destination
- **“Look before you book”:** much more than a simple booking web site.
A valuable way to check the marketing information you have been given from a Web 2.0 point of view to get acquainted with “the good, the bad and the ugly” of your next holiday destination and hotel.
- **Lots of features to help travellers plan and share their holidays (Hotel Popularity Index, Check rates, Candid photos, Maps, TripWatch, Travel Experts, Quick Guides, Travelers’ Networks)**

... unbiased, honest, real

“E’ una via di mezzo tra un ospedale e una casa di riposo per anziani. Le lenzuola sono pulite, ma non guardate sotto il letto (bleah!)”

- *La recensione di un viaggiatore TripAdvisor su un hotel di Las Vegas*

“Spettacolare. Assicuratevi di prenotare una stanza sul lato che si affaccia sul fiume, preferibilmente al 12° piano o ancora più in alto. Vedere il sole tramontare sopra la vegetazione è di una bellezza mozzafiato. Ma qualunque sia la sistemazione, in questo hotel non potete sbagliare.”

- *La recensione di un viaggiatore TripAdvisor su un hotel in Costa Rica*

“Assolutamente disgustoso... Non appena si entra, il puzzo di fumo e l’odore di stantio sono davvero opprimenti”

- *La recensione di un viaggiatore TripAdvisor su un hotel nella zona di Londra*

“Comprerei questo posto per venirci a vivere – se me lo potessi permettere.”

- *La recensione di un viaggiatore TripAdvisor su un hotel di Parigi*

Successful Facebook Apps

Launching on other Networks

Local Picks

facebook Profile edit

Search

Applications edit

- Cities I've Visited
- Local Picks
- Traveler IQ Challenge
- Spring Break Tracker
- Ads and Pages
- My Travel Blogs

Dance Camp for Kids in PA

Hakkasan

8 Hanway Place
Fitzrovia London
+44 (0)20 7907

Chinese \$153
Friends: ★★
Everyone: ★★
My Rating: ★★

Lowlander

36 Drury Lane L
+44 (0)20 7378

\$51
Friends: ★★
Everyone: ★★

TravelPod

TravelPod®
The web's original travel blog

Cities I've Visited

facebook Profile edit Friends ▾ Inbox (12) ▾ home account privacy logout

My Travel Map | NEW** My Friends | All Travelers | Invite | Customize | HOT** Our Restaurant App | Help

Cities I've Visited Update Profile My TravelMap by TripAdvisor

Never settle for a mediocre meal again!
Get restaurant recommendations from your friends. [Get Local Picks!](#)

Put this map on your blog/website: [Get the code](#) Language: English - US

Add a new location by city name: add

447 destinations

GOING THERE
CAN ADVISE FRIENDS
BEEN THERE

- Punta Cana, Dominican Republic
- Cancun, Mexico
- Playa del Carmen, Mexico
- Rome, Italy
- Sharm El-Sheikh, Egypt
- Barcelona, Spain
- Venice, Italy
- Puerto Plata, Dominican Republic
- Dubai, United Arab Emirates
- Puerto Vallarta, Mexico





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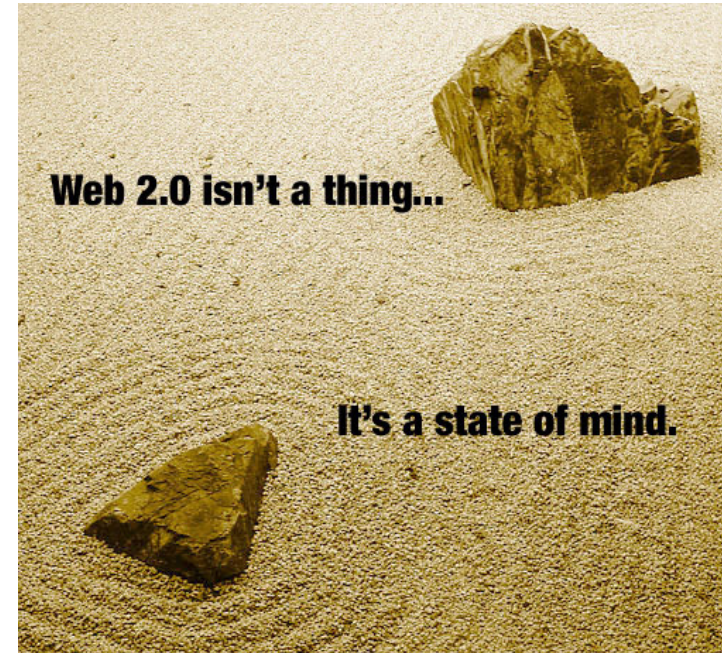
Antarctica Terms of Use

Been: Can advise friends: Favorite: Going: Next 10 Done


Home: Boston, Massachusetts [edit](#)


TripAdvisor Business Model


-  Matching content with commerce is how we earn our keep
-  Deep-links to commerce partners sites are automatically indexed into our content pages
-  Relevance of advertising placements determines the quality of the traffic we send to our partners
-  Graphical ads offer another way to reach our audience



TripAdvisor Business Model

 Our users see an array of **top booking sites** including...

- Venere 
- eDreams 
- Lastminute 
- Hotels.com 
- Orbitz 
- Hotwire.com 
- Expedia 
- Booking.com 
- Opodo 
- TUI 
- Priceline 
- Ebookers 

 Plus **hotel brand sites** including...

- Sol Melia Hotels 
- Hilton 
- Hyatt 
- InterContinental Hotel Group 
- Starwood 
- Best Western 
- Accor 
- Iberostar Hotels 

TripAdvisor and the Internet marketing for the Hospitality Industry: open points and trends

TRAVELERS

- A worldwide net of travel experts reshaping the travellers' demand
- Transparent reviews on hotels
- TGC (Travel Generated Contents)
- Interactive approach
- Next-generation Web 2.0 travellers learn more and more quickly

The Internet usage is strongly driving and influencing the web 2.0 travel demand worldwide.



The real challenge for hoteliers is learning to seize the opportunities of on-line visibility.

HOTELS

- The competitive standards for hotels get higher and higher.
- Hoteliers bet on the Internet as sales channel
- Hotel managers can improve their services and quality according to the TGC and to the feedbacks gathered
- The hoteliers can monitor their brand on-line and respond accordingly
- Hotel Managers get strongly influenced by on-line reputation.

Web 2.0 in Italy: open points

WE RISK A GAP BETWEEN THE REAL HOSPITALITY STANDARDS AND THE ON-LINE REVIEWS ON HOTELS

THE HOTELIERS HAVE NOT DEVELOPED SPECIFIC ADV ACTIONS TO TARGET COMMUNITIES YET (VIRAL MARKETING, NEWSLETTERS, ETC.)

COMMUNITIES HAVE BECOME A RELIABLE SOURCE OF INFORMATION. BUT TO WHICH EXTENT?



ITALY: STILL A BACK MARKER?




TRAVELLERS' SELF-CONSCIOUSNESS IS GETTING STRONGER AND STRONGER: NOWADAYS' TOURISTS ARE MORE DEMANDING AND CRITICAL.

HOTELIERS STILL FIND HARD DEALING WITH TRAVELLERS' FEEDBACKS

* Source: BitLab, October 2008

What's next?

Following is a preview of the next big wave of ideas that will shape the travel marketplace over the next 12 to 18 months according to PhoCusWright (Data: October 2008).

-  **The growth of pure Travel 2.0 businesses is slowing dramatically**
-  **Abundant, varied mobile applications are beginning to emerge**
-  **Attention shifts from “learn, shop, book” to the travel value chain.**
Innovators are recognizing that elements beyond “learn, shop, book” in the travel value chain can be monetized. Expect pre-trip, trip experience, and post-trip technology models to arise.



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