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Refining the Travel Search Process

Examining the use of Search when shopping online for travel options

Google/Compete
U.S., December 2009

Contents

1 Overview & Methodology

2 Market Overview and Research Intensity

3 Consumer Search Process

Purpose of Study & Methodology

Purpose of Study

- Quantify how consumers use search when shopping online for travel products (e.g., hotel rooms, flights, cruises, car rentals)
- Examine changes in travel shopping since Summer 2008

Methodology

- Conducted on Compete's proprietary U.S. consumer dataset
- Study timeframe for consumer search process: Jan – Jun 2009
- Online travel researchers split into 2 mutually exclusive categories:
- Shoppers: Visited travel sites, but did not book online during study timeframe
- Bookers: Visited travel sites and booked online at least once during study timeframe
- For online travel bookers, Compete pulled a history of search query and search referral activity for the 60 days prior to booking

Queries & Referrals

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Web [Show options...](#)

Each Search generates a query

[Las Vegas Hotel Specials](#)

[Harrahs.com/PulseOfVegas](#) Stay Center Strip for Less. Book

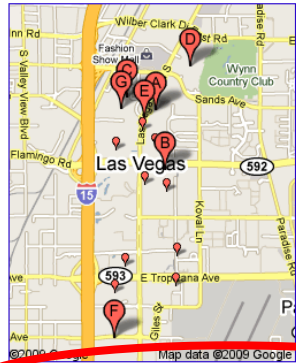
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A [The Venetian Resort-Hotel-Casino](#)
[www.venetian.com](#) - (702) 414-1000 - 2645 reviews

B [Bally's Las Vegas Hotel & Casino](#)
[www.ballyslasvegas.com](#) - (800) 634-3434 - 1431 reviews

C [Treasure Island Hotel and Casino](#)
[www.treasureisland.com](#) - (800) 288-7206 - 2428 reviews

D [Wynn Las Vegas - Hotels Las Vegas](#)
[www.wynnlasvegas.com](#) - (702) 770-7000 - 2450 reviews

E [Harrah's Las Vegas Hotel & Casino](#)
[www.harrahsLasvegas.com](#) - (800) 214-9110 - 1144 reviews

F [Luxor Hotel and Casino](#)
[www.luxor.com](#) - (702) 262-4400 - 3453 reviews

G [The Mirage Hotel and Casino](#)
[www.mirage.com](#) - (800) 374-9000 - 1991 reviews

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Clicking a result generates a referral

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Contents

1 Overview & Methodology

2 Market Overview and Research Intensity

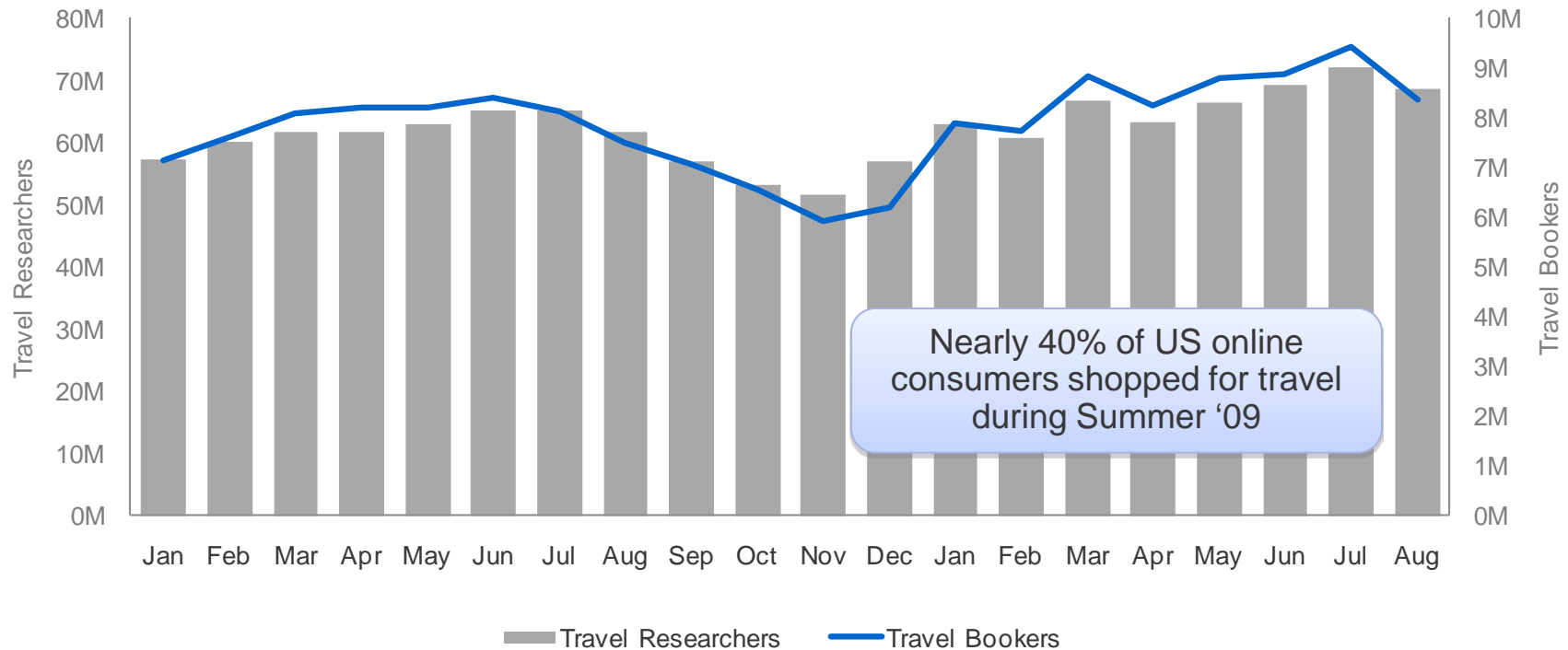
3 Consumer Search Process

Key Takeaways

- More consumers researching and booking travel online in 2009
- Engagement with travel sites by individual travelers up in 2009, particularly for air, hotel and OTA
- Changes in flight booking fees shifted 6 points of flight booking share back to OTAs
- 50% of travel bookers use search engines to research

Increased Activity in Researching and Booking in 2009

Online Travel Shopper and Booker Trends
(Monthly volume, Jan 08 – Aug 09)

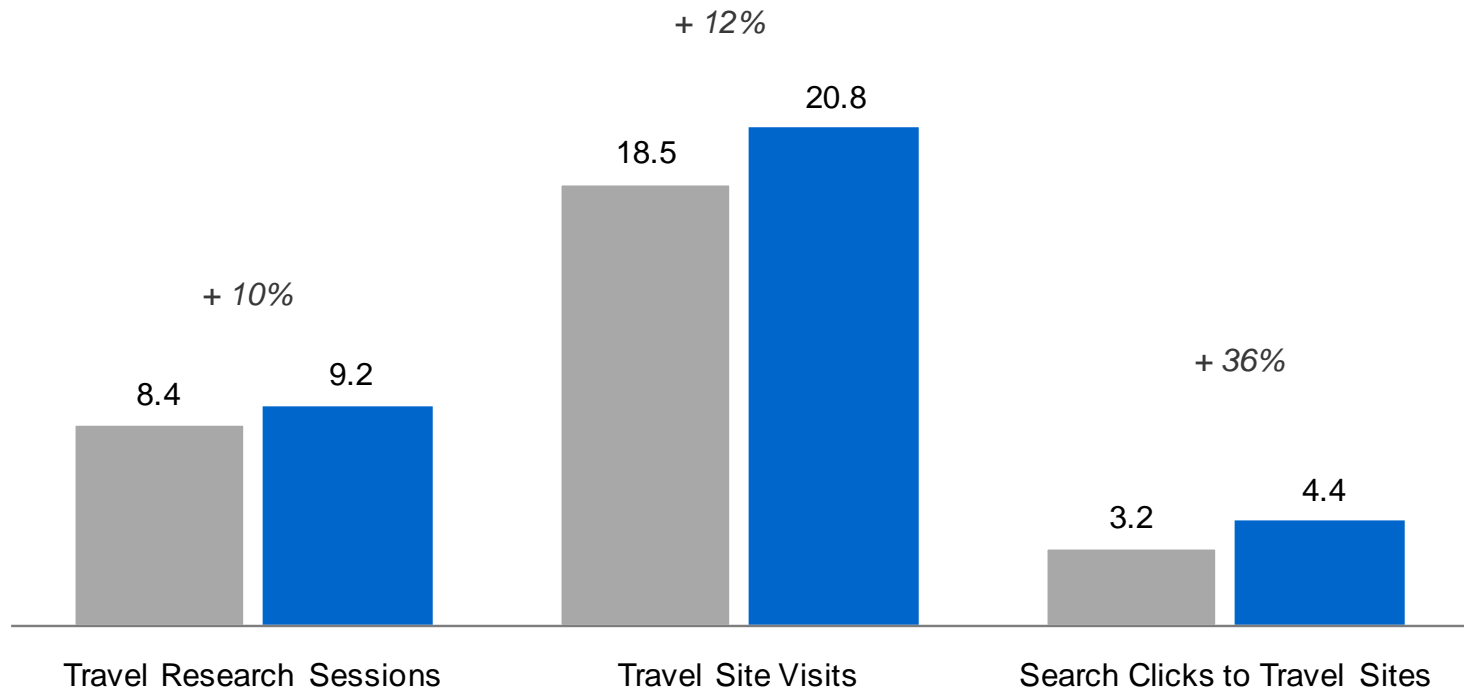


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with Google Source: Google/Competition Refining the Travel Search Process, 2009.
Base: Travel bookers from Jan '08 – Aug '09

Travelers Consuming More Content in 2009

Year-over-Year Online Travel Content Consumption
(Average instances of each metric for travel bookers prior to booking, Jun – Aug 08 v. 09)



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■ 2008 Summer Bookers

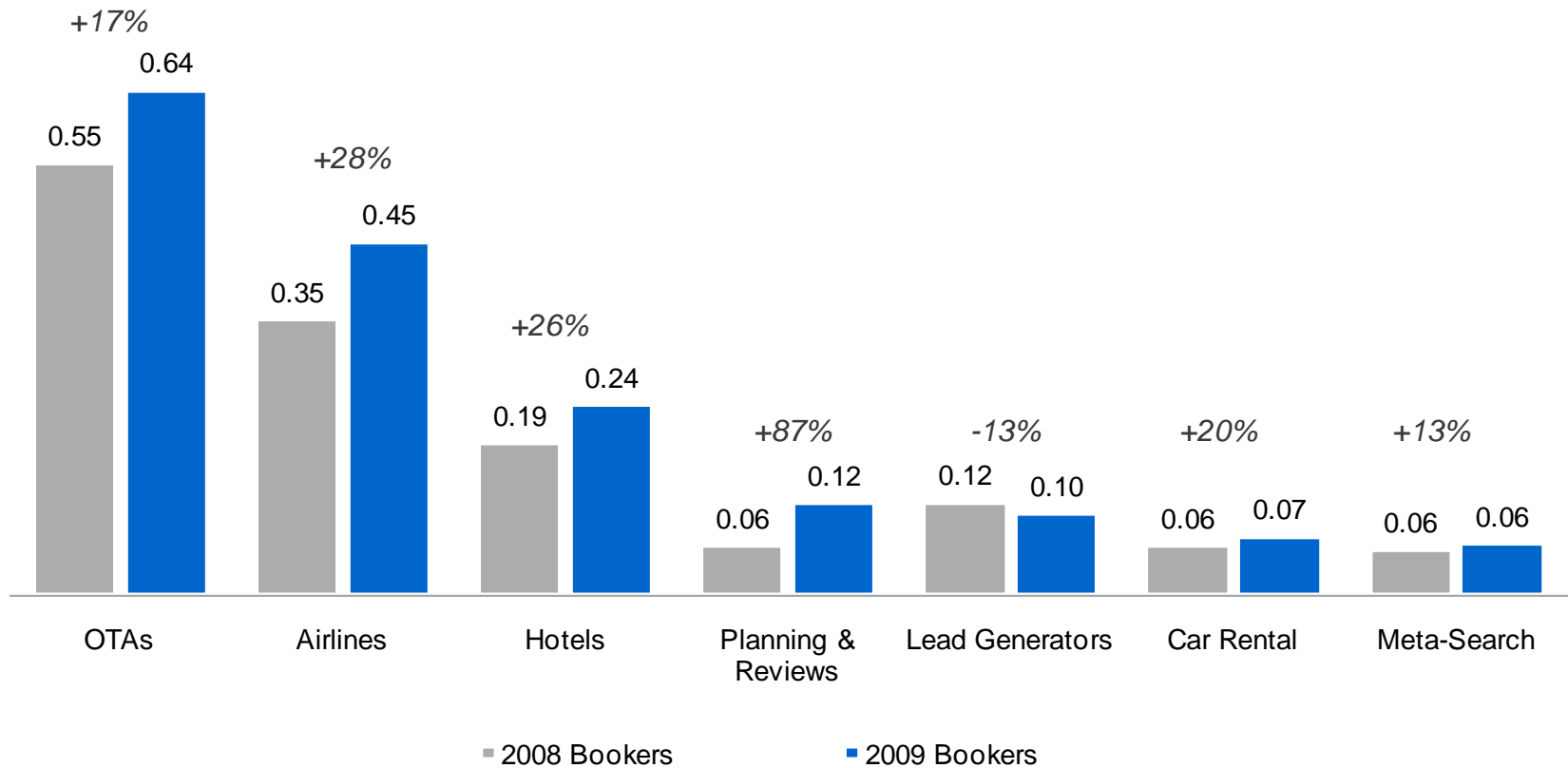
■ 2009 Summer Bookers

with Google Source: Google/Compete Refining the Travel Search Process, 2009.
Base: Travel bookers from Jun – Aug '08; Jun – Aug '09

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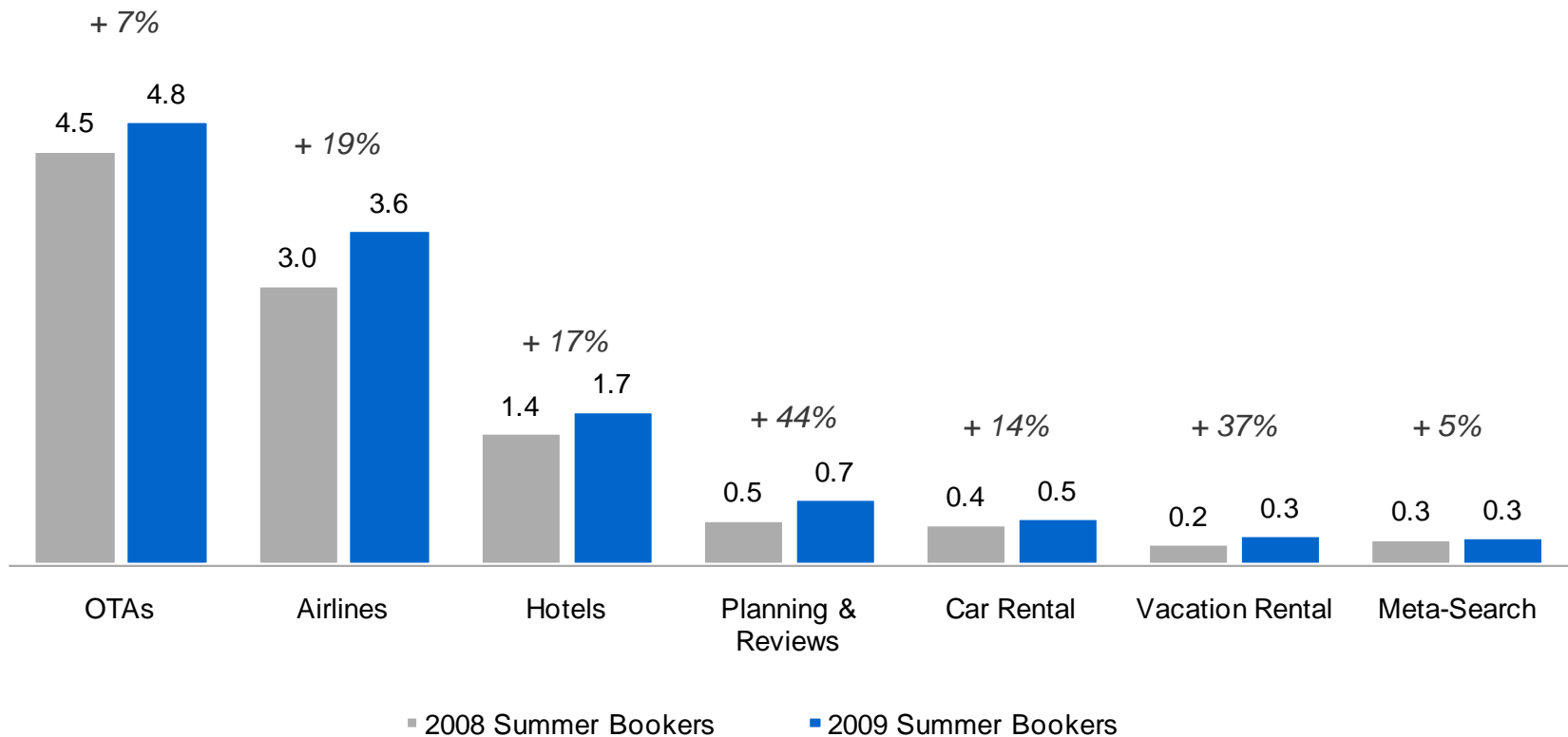
Average Visits Per Booker Indicates Deeper Research

Average Site Visits to Each Type of Site
(Average number of visits to each site category before booking, Jun – Aug 08 v. 09)

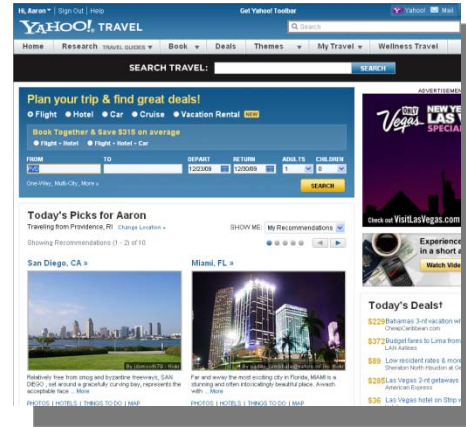
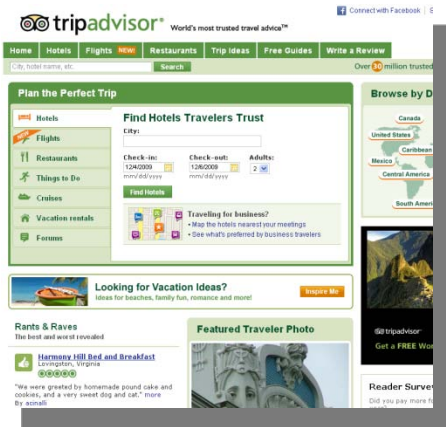


Time Researching is Up Across All Categories

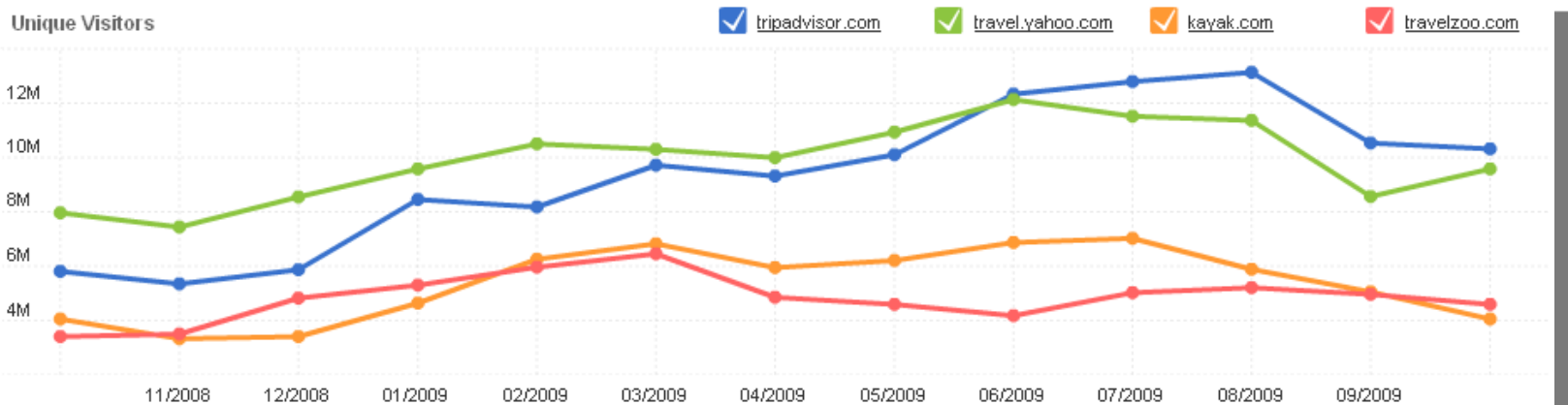
Average Minutes Spent on Each Type of Site
(Average minutes spent visiting each site category before booking, Jun – Aug 08 v. 09)



TripAdvisor Passed Yahoo! Travel as Most Visited Travel-Related Site



Unique Visitors



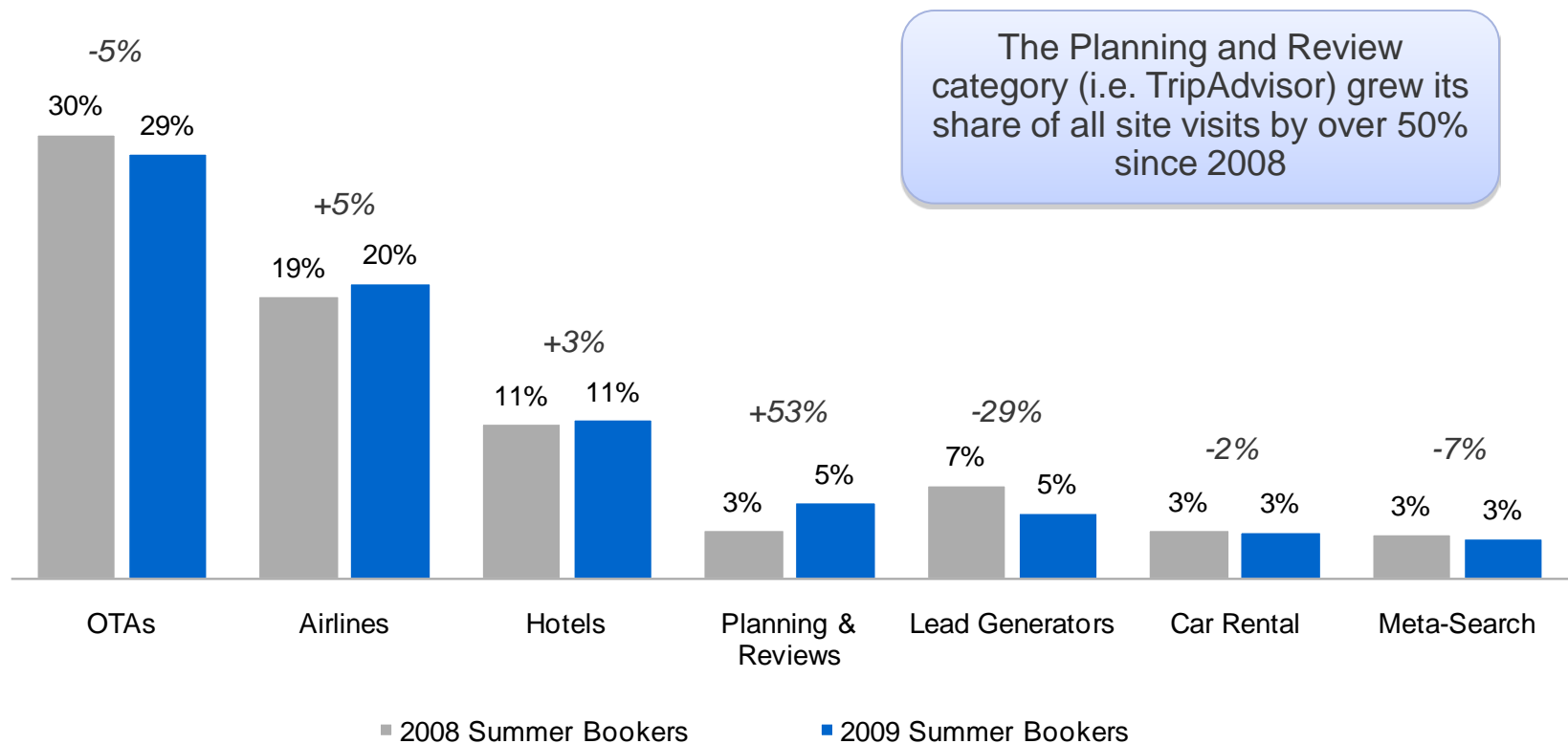
Source: www.compete.com



Source: Google/Compete Refining the Travel Search Process, 2009.

Travel Shopping Involves a Wide Variety of Sites

Distribution of Travel Site Visits Prior to Booking
(Share of visits to each site category before booking, Jun – Aug 08 v. 09)

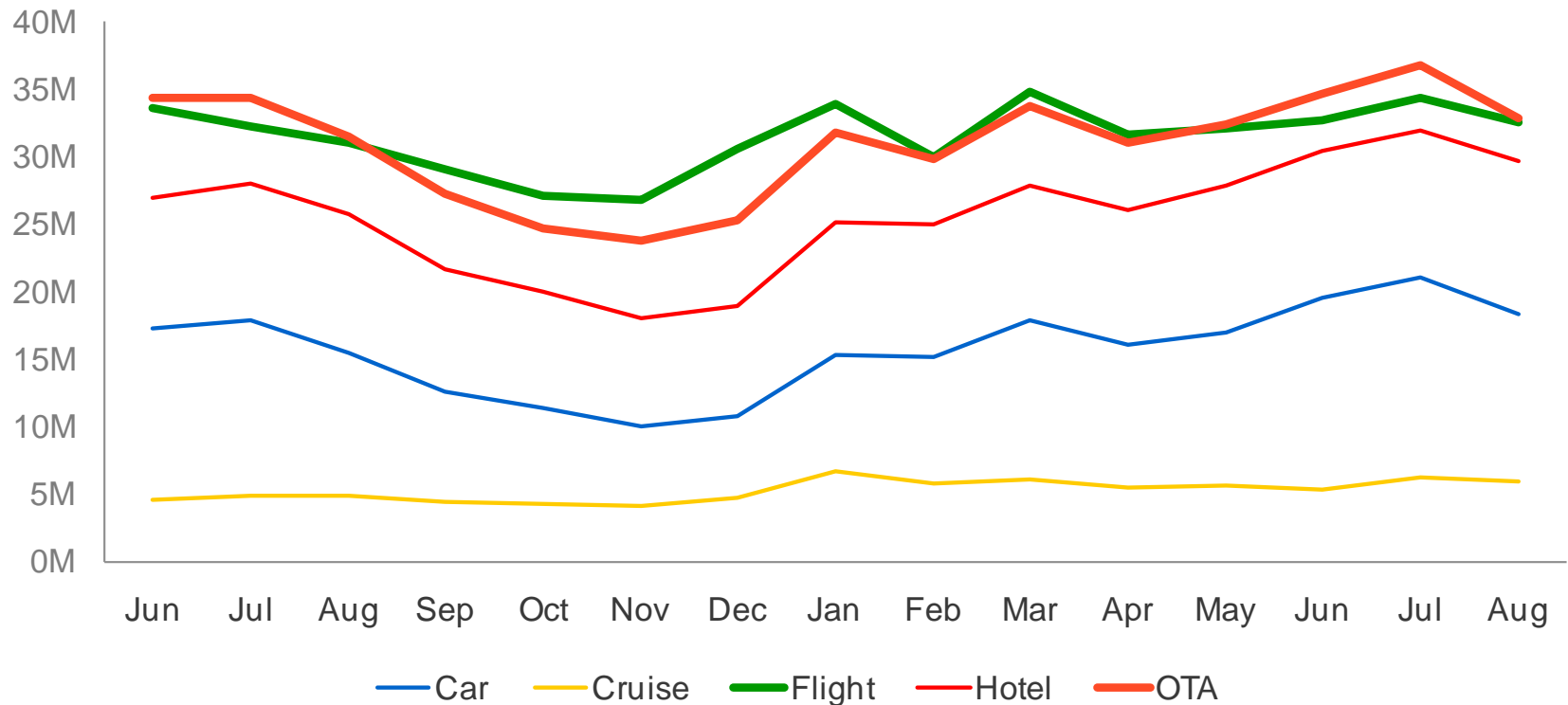


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with Google Source: Google/Compete Refining the Travel Search Process, 2009.
Base: Travel bookers from Jun – Aug '08; Jun – Aug '09

OTA Volume Passed Airline Volume in Q2 and Q3

Aggregate Researcher Volumes by Product
(Unique visitors to each travel product, Jun 08 – Aug 09)

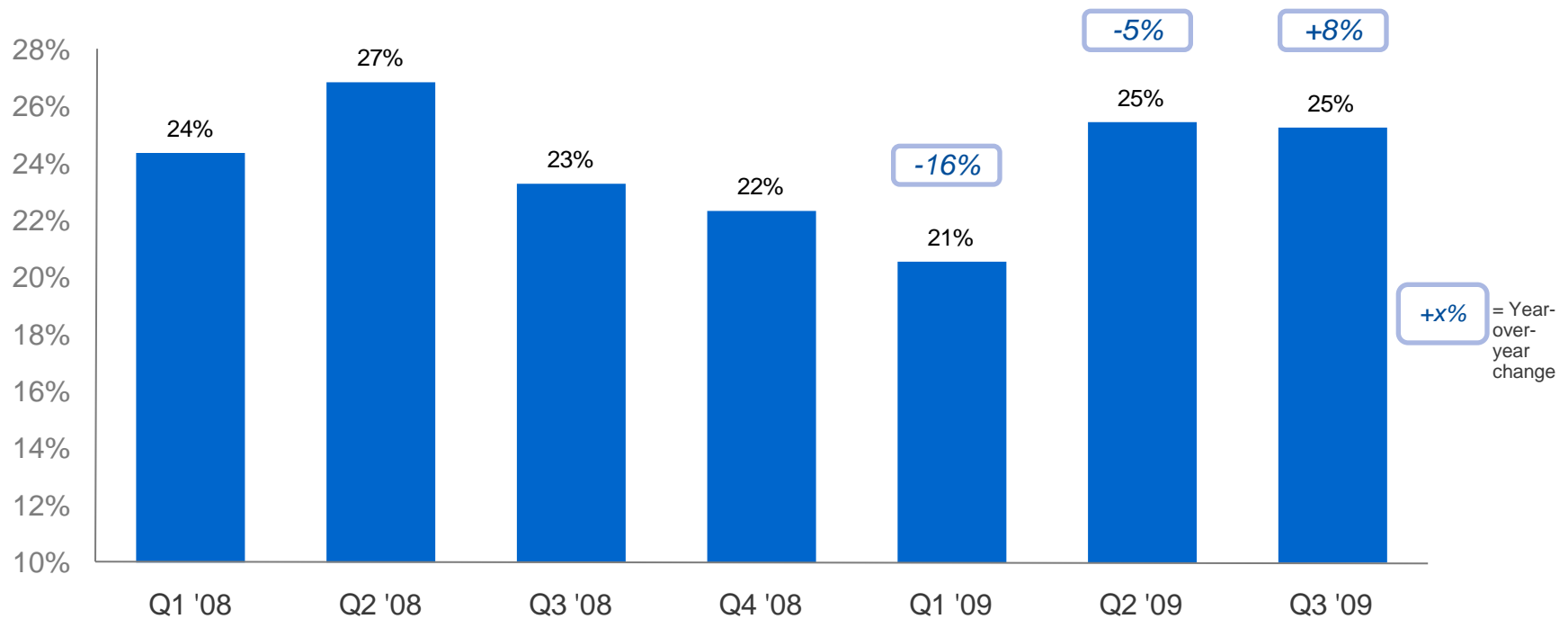


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with Google Source: Google/Compete Refining the Travel Search Process, 2009.
Base: Travel shoppers from Jun '08 – Aug '09

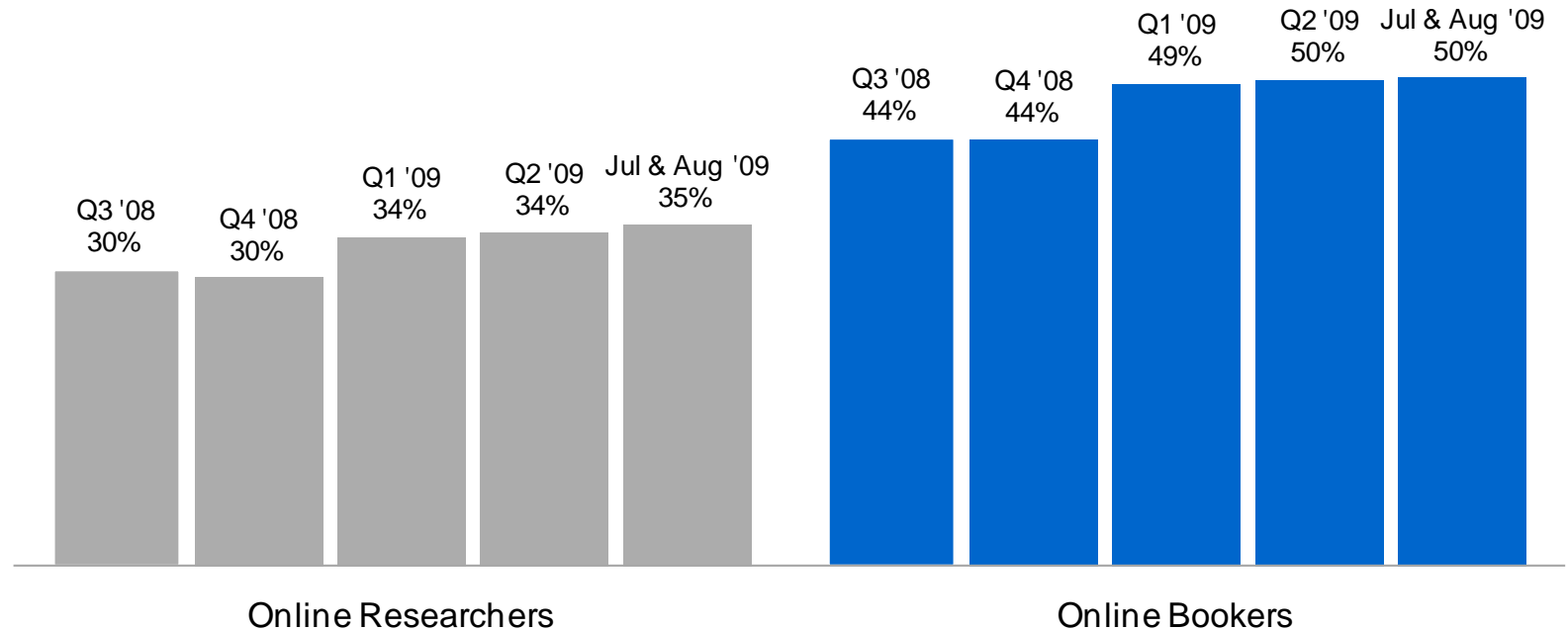
OTA Flight Booker Share Boosted by Fee Cuts

OTA Flight Booker Share
(% flight bookers captured by OTAs, Jan '08 – Sep '09)



Increased Use of Search by Bookers and Shoppers from 2008

Search Engine Usage Rates for Travel Research
(% of researchers and bookers using search engines to research travel, Q3 '08 – Aug '09)



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with Google Source: Google/Competition Refining the Travel Search Process, 2009.
Base: Travel shoppers and bookers from Jun '08 – Aug '09

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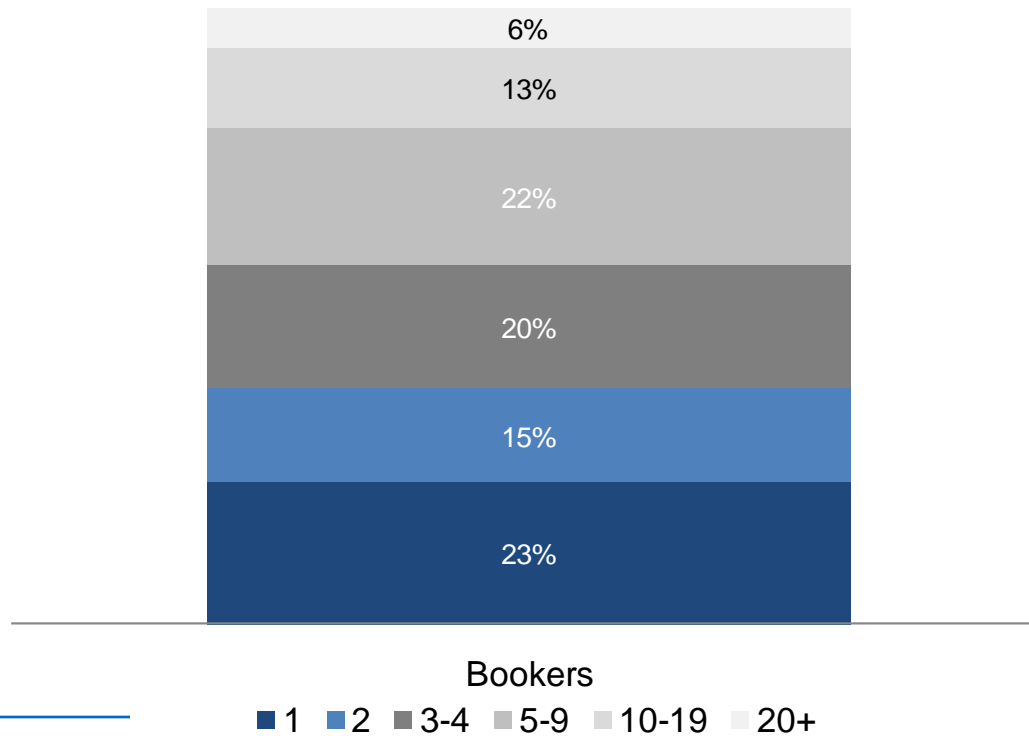
3 Consumer Search Process

Key Takeaways

- Travel bookers search an average of 6 times before booking
- The likelihood to book increases with search frequency
- Most qualified traffic comes from shoppers searching on both brand and generic terms
- Sponsored links account for 1 in 10 search clicks and convert better than organic results
- 8% of bookings take place in the same session as the referral

Majority of Travel Shoppers Search 3 or More Times Before Booking

Number of Travel Booker Search Queries
(Aggregate Travel Bookers from Jan – Jul 2009)



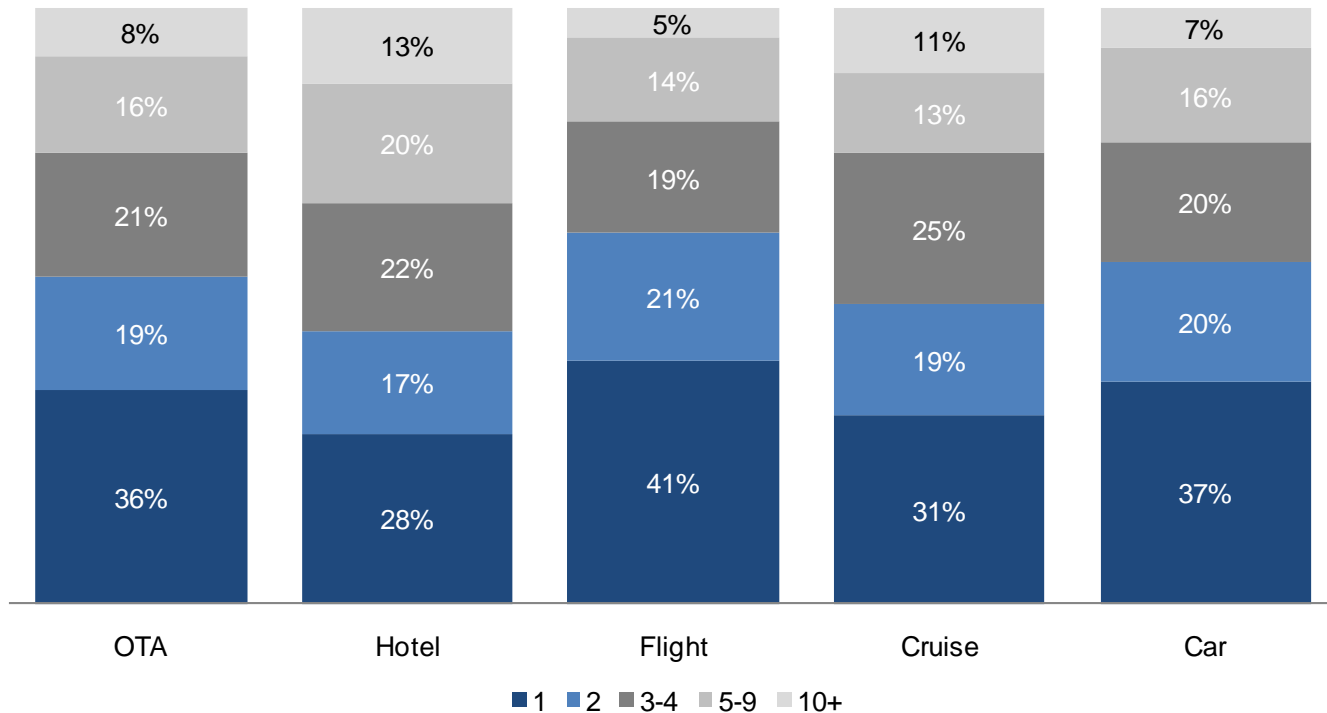
Average # of queries
6.0

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with Google Source: Google/Compete Refining the Travel Search Process, 2009.
Base: Travel bookers from Jan – Jul 2009; Total query volume among travel bookers: 53.2M

Hotel Bookers the Most Frequent Searchers

Number of Travel Booker Search Queries, By Travel Category
(Jan – Jul 2009)

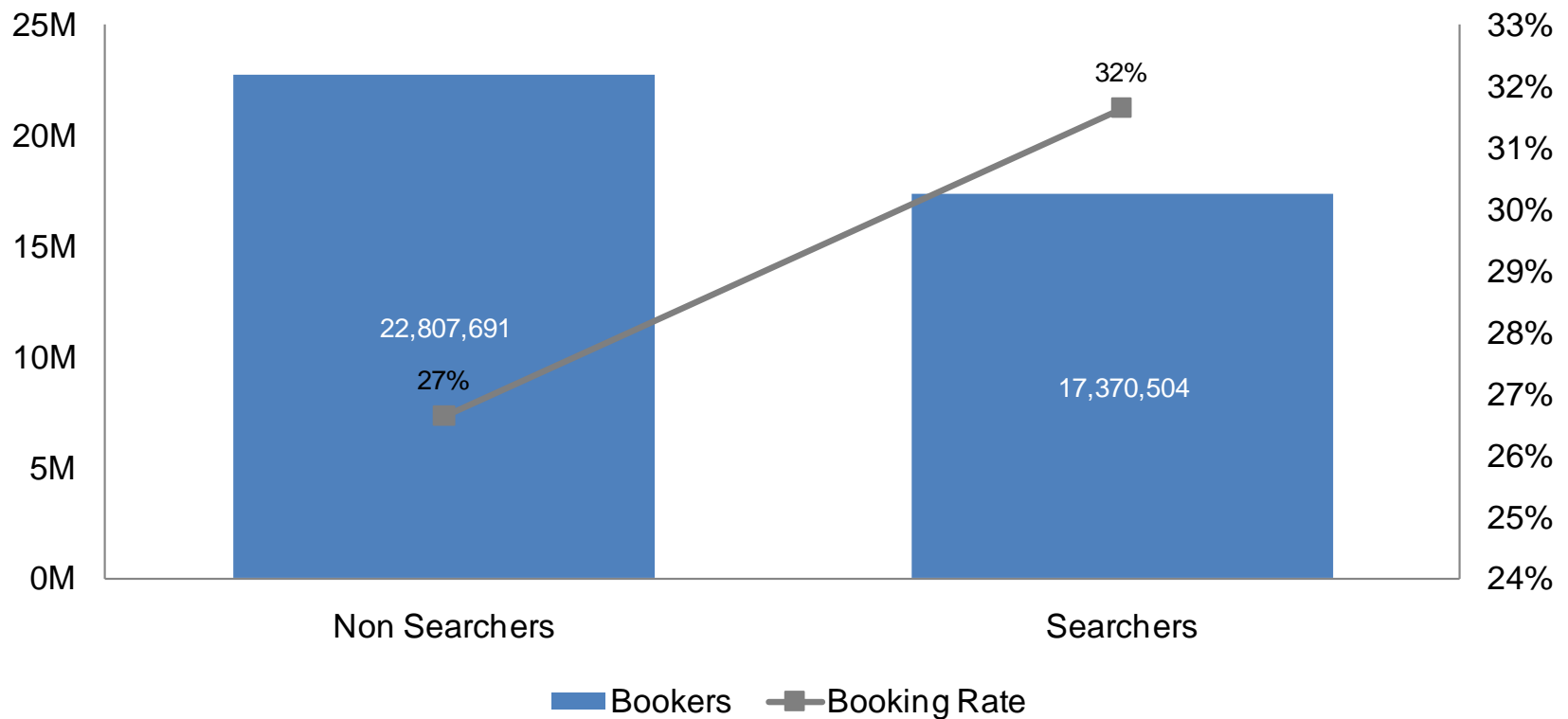


Average # of queries	OTA	Hotel	Flight	Cruise	Car
	3.9	4.7	3.3	4.4	3.7



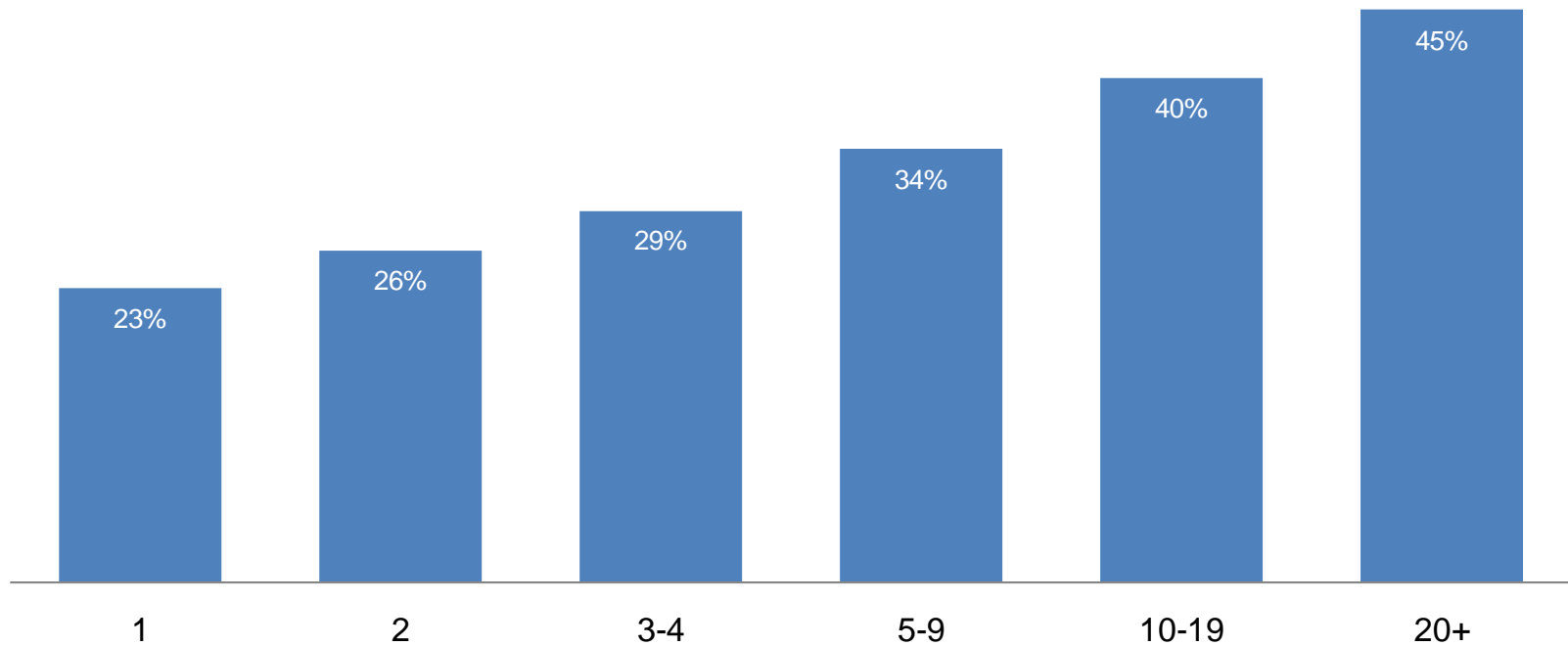
Traffic from Search More Likely to Book

Searchers v. Non-Searchers: Volume and Booking Rate Comparison
(Jan – Jul 2009)



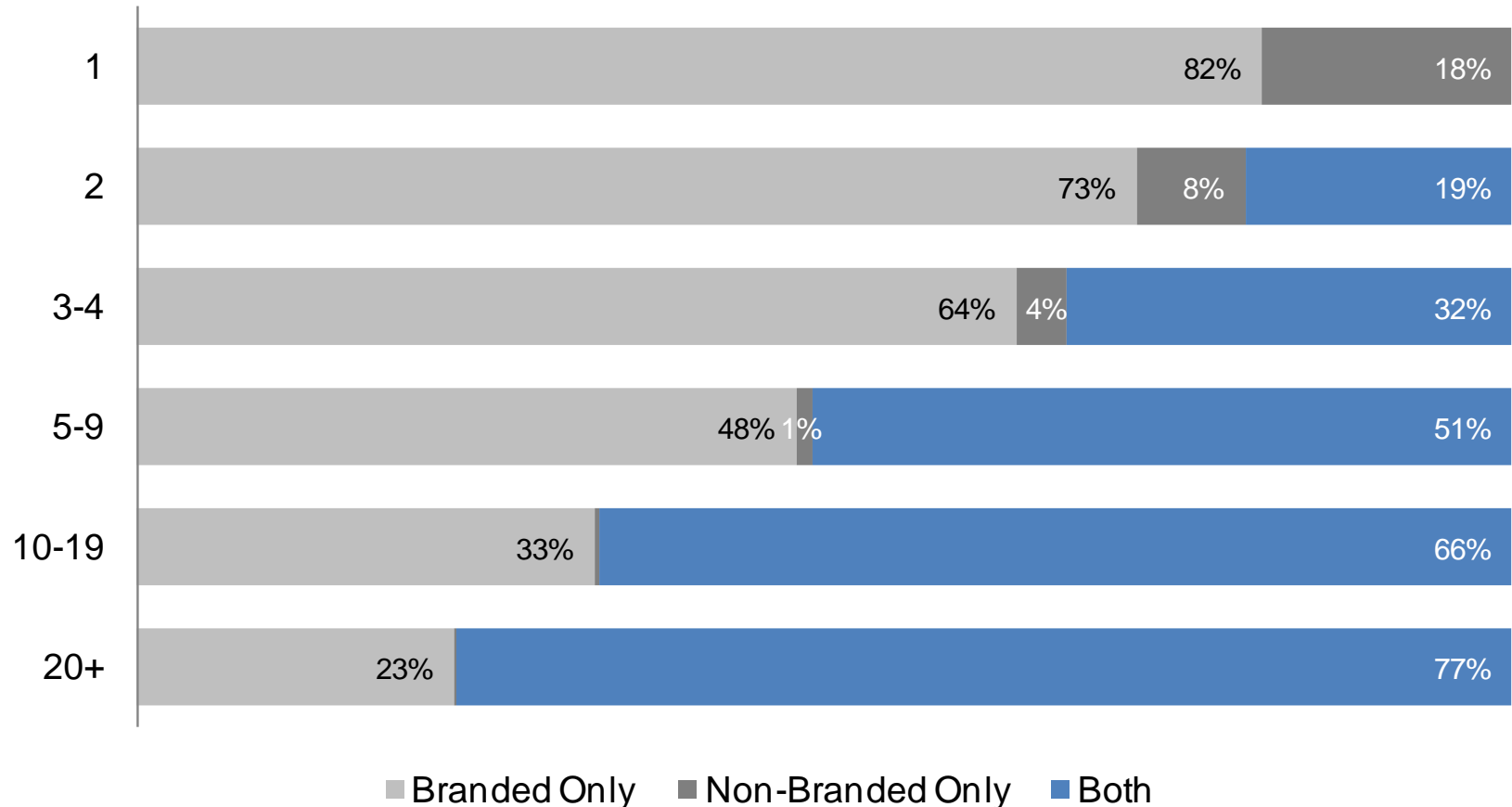
More Queries Equates to Higher Booking Rate

Booking Rates by Number of Search Queries
(Jan – Jul 2009)



Heavy Searchers Use Both Brand & Non-Brand

Branded Versus Non-Branded Search, by Number of Queries
(Jan – Jul 2009)

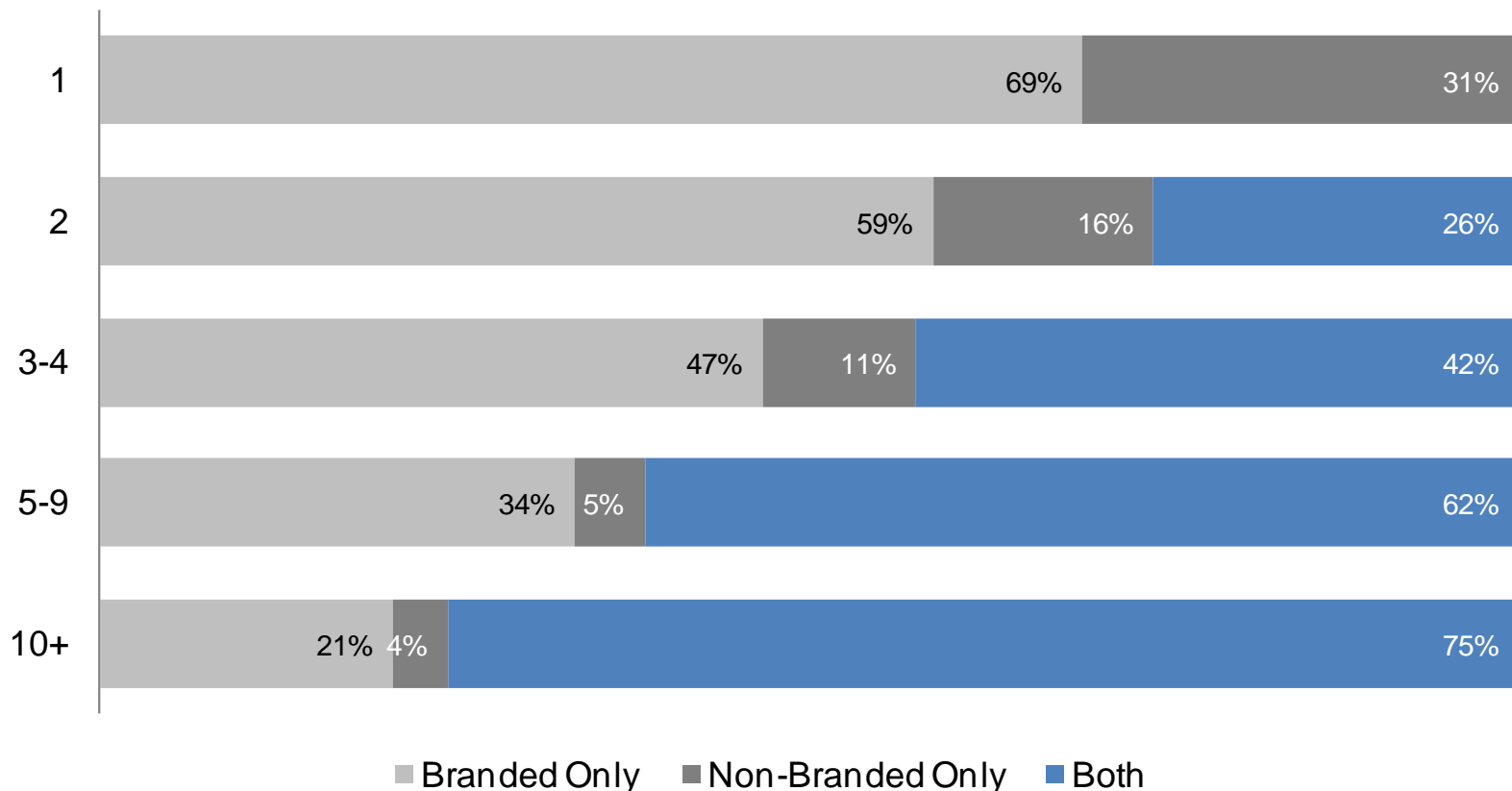


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with Google Source: Google/Compete Refining the Travel Search Process, 2009.
Base: Travel bookers from Jan – Jul 2009; Total query volume among travel bookers: 53.2M

Frequent Flight Searchers Trend Towards Using Both Brand and Non-Brand Terms

Branded Versus Non-Branded Search, by Number of Queries
(Jan – Jul 2009)

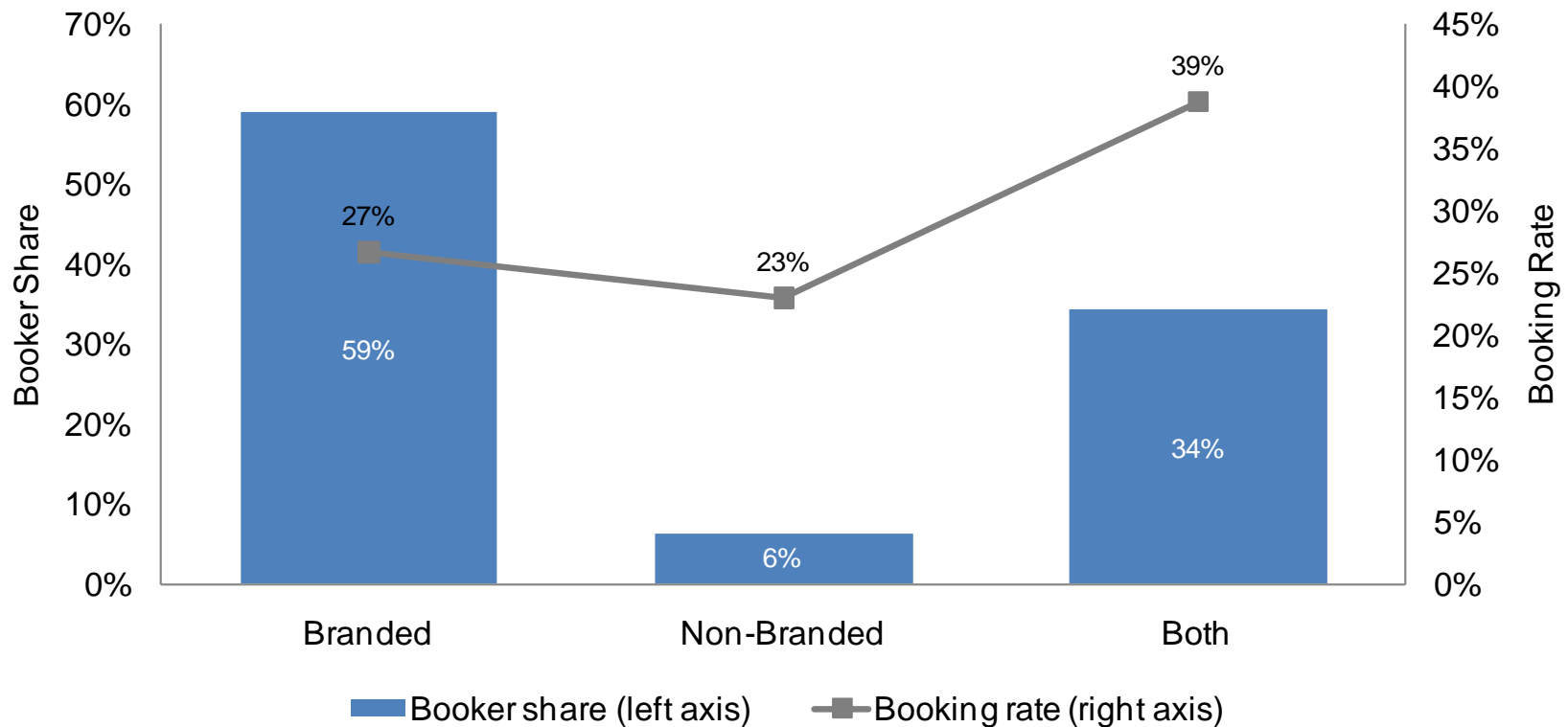


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with Google Source: Google/Compete Refining the Travel Search Process, 2009.
Base: Flight bookers from Jan – Jul 2009; Total query volume among flight bookers: 9.2M

Those Searching Both Generic and Brand Terms Most Likely to Book

Share of Shoppers & Bookers by Query Term Type Used and Booking Rate
(Jan – Jul 2009)



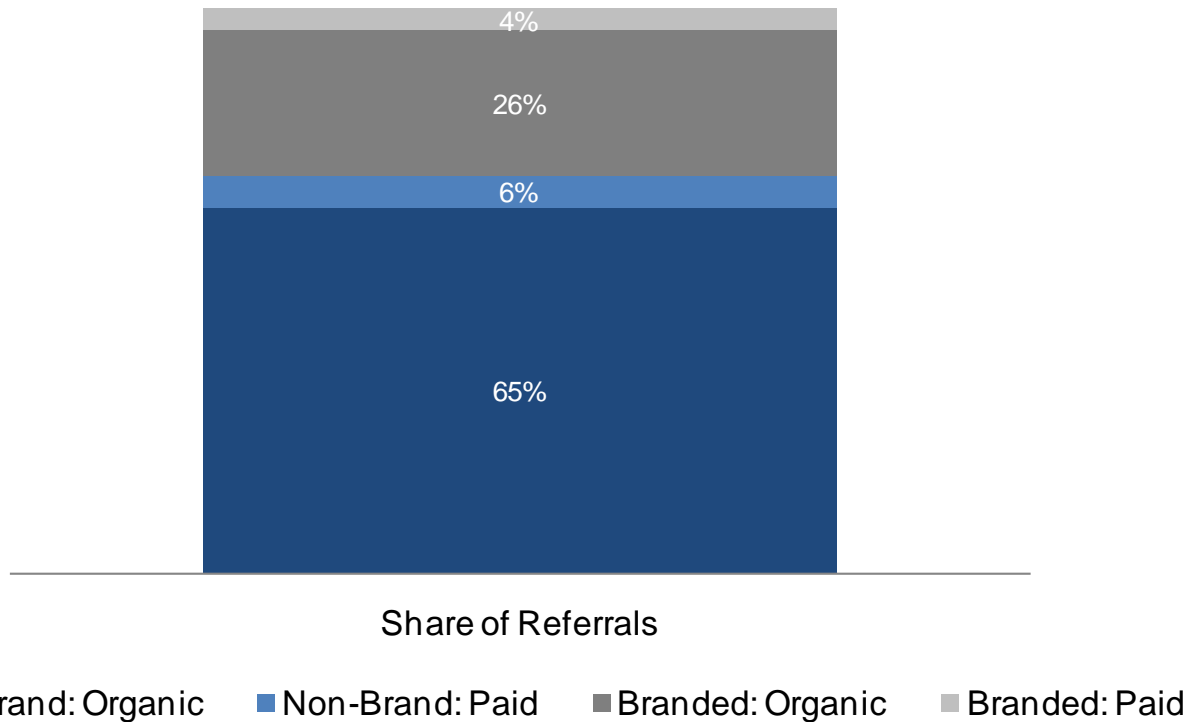
More Flight Searchers Stick with Non-Brand Terms Only

Share of Shoppers & Bookers by Query Term Type Used and Booking Rate
(Jan – Jul 2009)



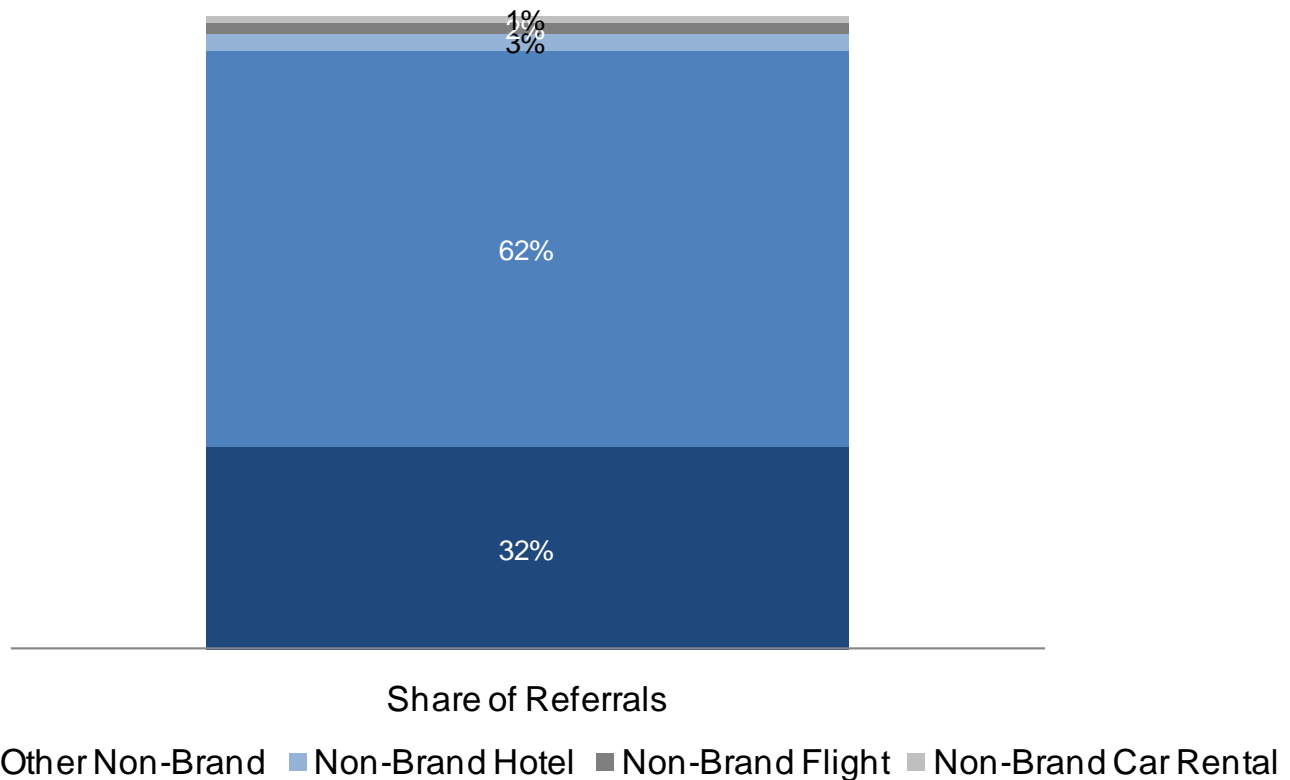
1 in 10 Search Clicks is Paid

Search Referrals by Term Type
(Jan – Jul 2009)



Most Referrals are Based on Non-Brand Terms

Search Referrals by Term Category
(Jan – Jul 2009)



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with Google Source: Google/Compete Refining the Travel Search Process, 2009.
Base: Travel bookers from Jan – Jul 2009; total referral volume among travel bookers: 48.6M

Paid Clicks on Brand Terms Convert Much Better than Organic

Booking Rates by Referral Term Type
(Jan – Jul 2009)



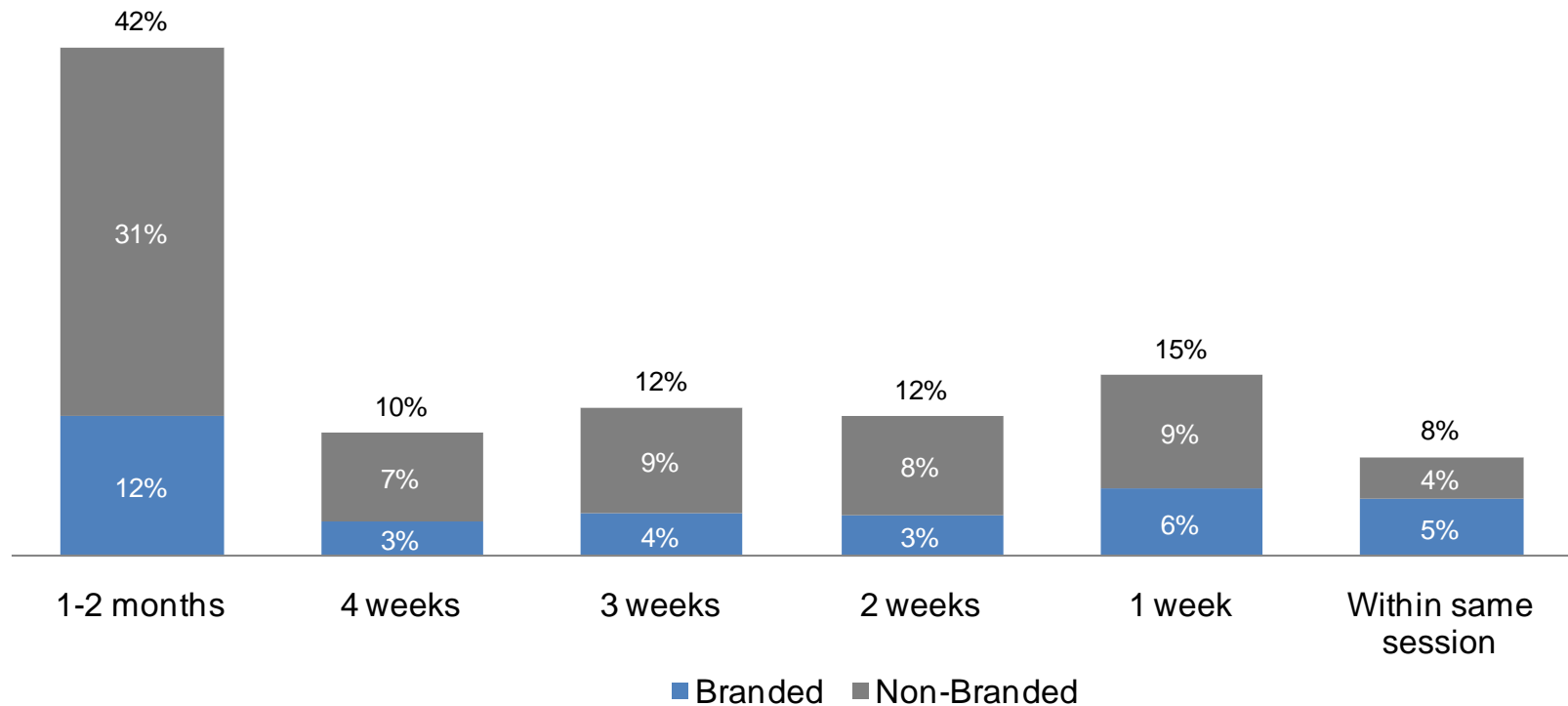
Paid Flight Clicks Convert at Nearly Same Rate as Organic

Booking Rates by Referral Term Type
(Jan – Jul 2009)



Travel Shoppers Search at All Shopping Stages

Timing of Search Referrals
(Jan – Jul 2009)



Key Takeaways

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