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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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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 & 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

Each Search generates a query

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Our guide to Las Vegas hotels will help you find the hottest deals whether you're looking for luxury Las Vegas resorts, or a cheap stay. Hotels in Las Vegas offer an option for every vacationer. Our Las Vegas hotel reviews cover room and hotel amenities, pool descriptions, as well as restaurant, nightclub and show listings. Make your Las Vegas hotel reservations using our easy to use process.

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Key Takeaways

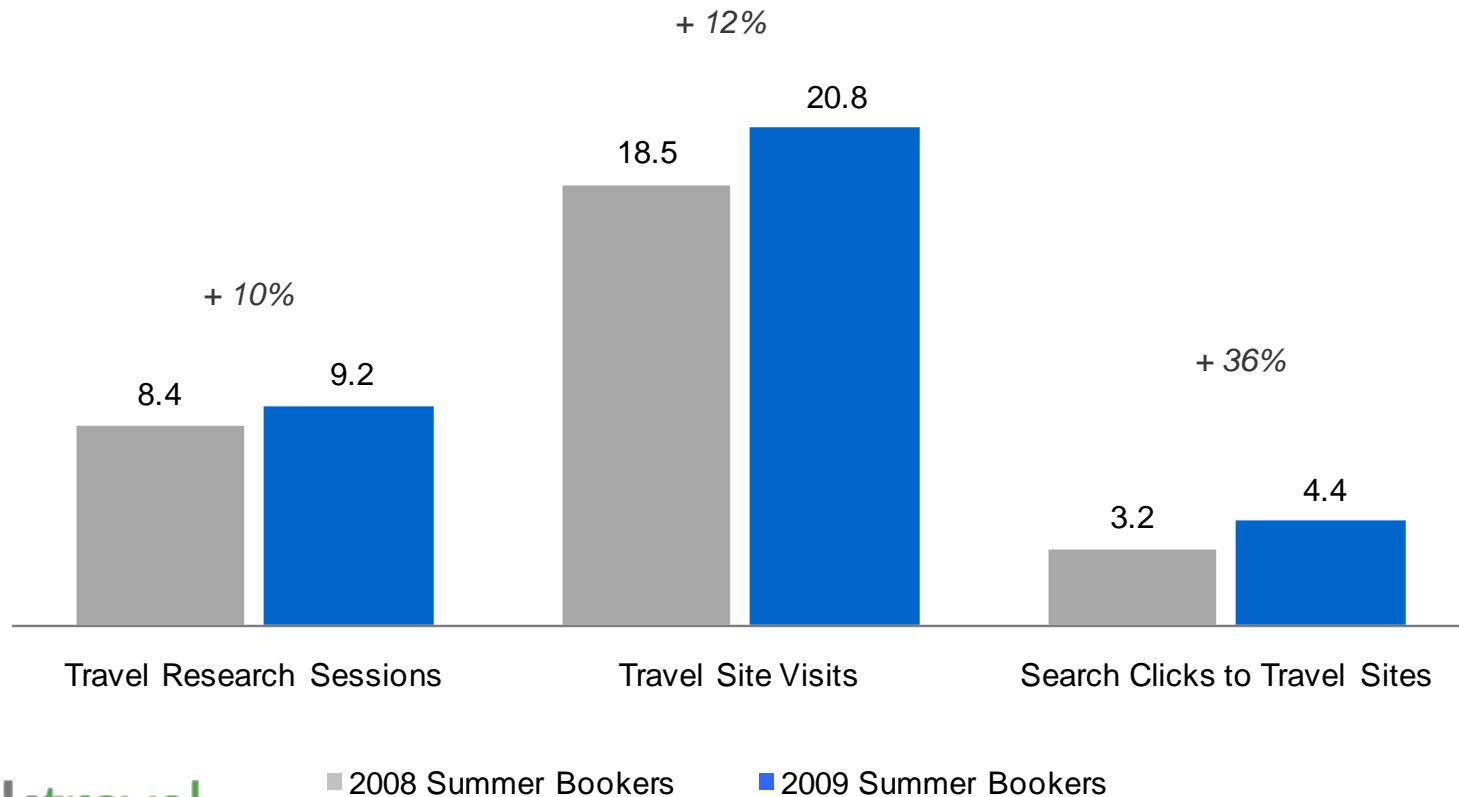
- More consumers researching and booking travel online in 2009
- Engagement with travel sites by individual travelers up in 2009, particularly for air, hotel and OTA
- Changes in flight booking fees shifted 6 points of flight booking share back to OTAs
- 50% of travel bookers use search engines to research

Increased Activity in Researching and Booking in 2009



Travelers Consuming More Content in 2009

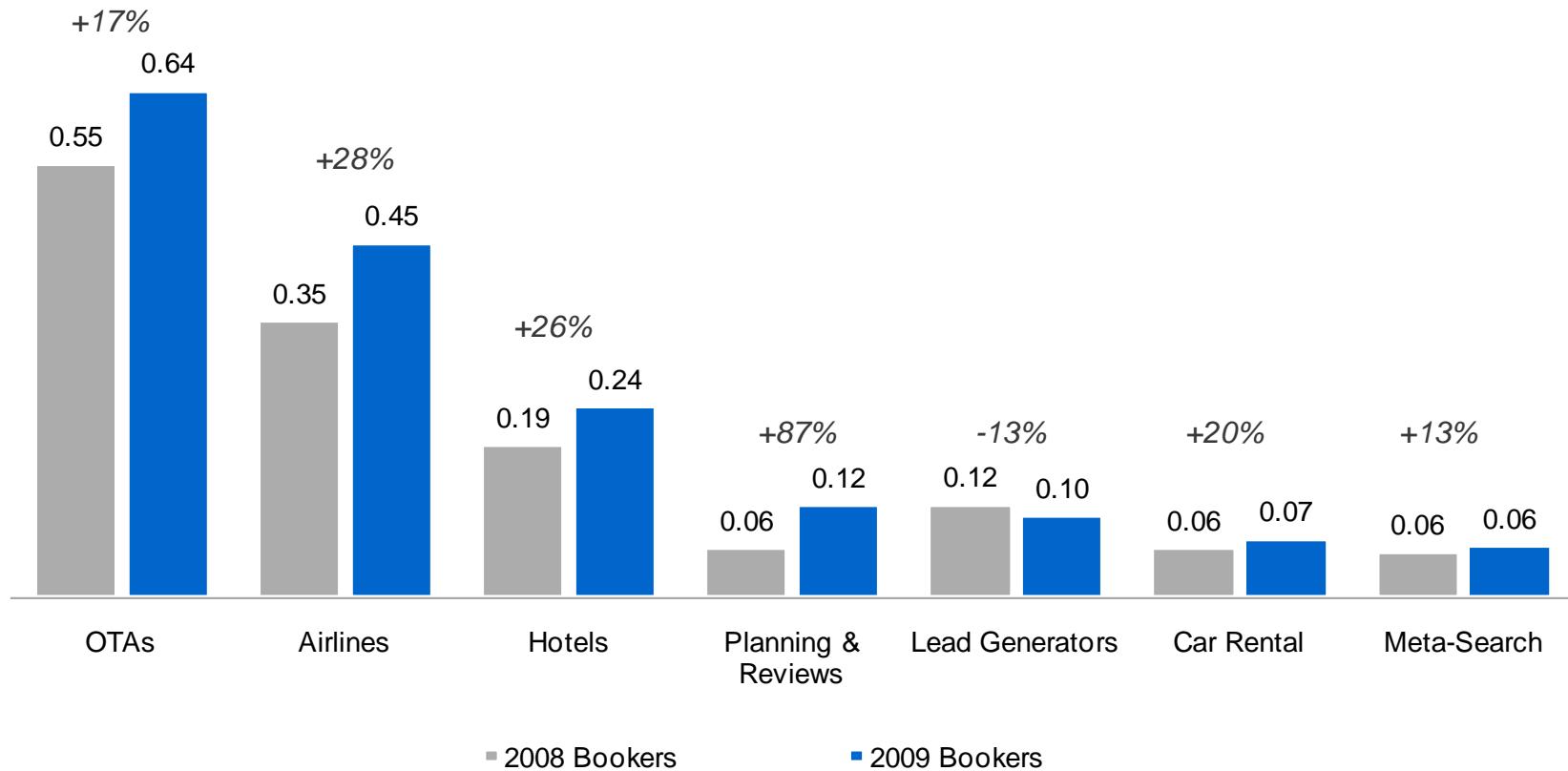
Year-over-Year Online Travel Content Consumption
(Average instances of each metric for travel bookers prior to booking, Jun – Aug 08 v. 09)



Average Visits Per Booker Indicates Deeper Research

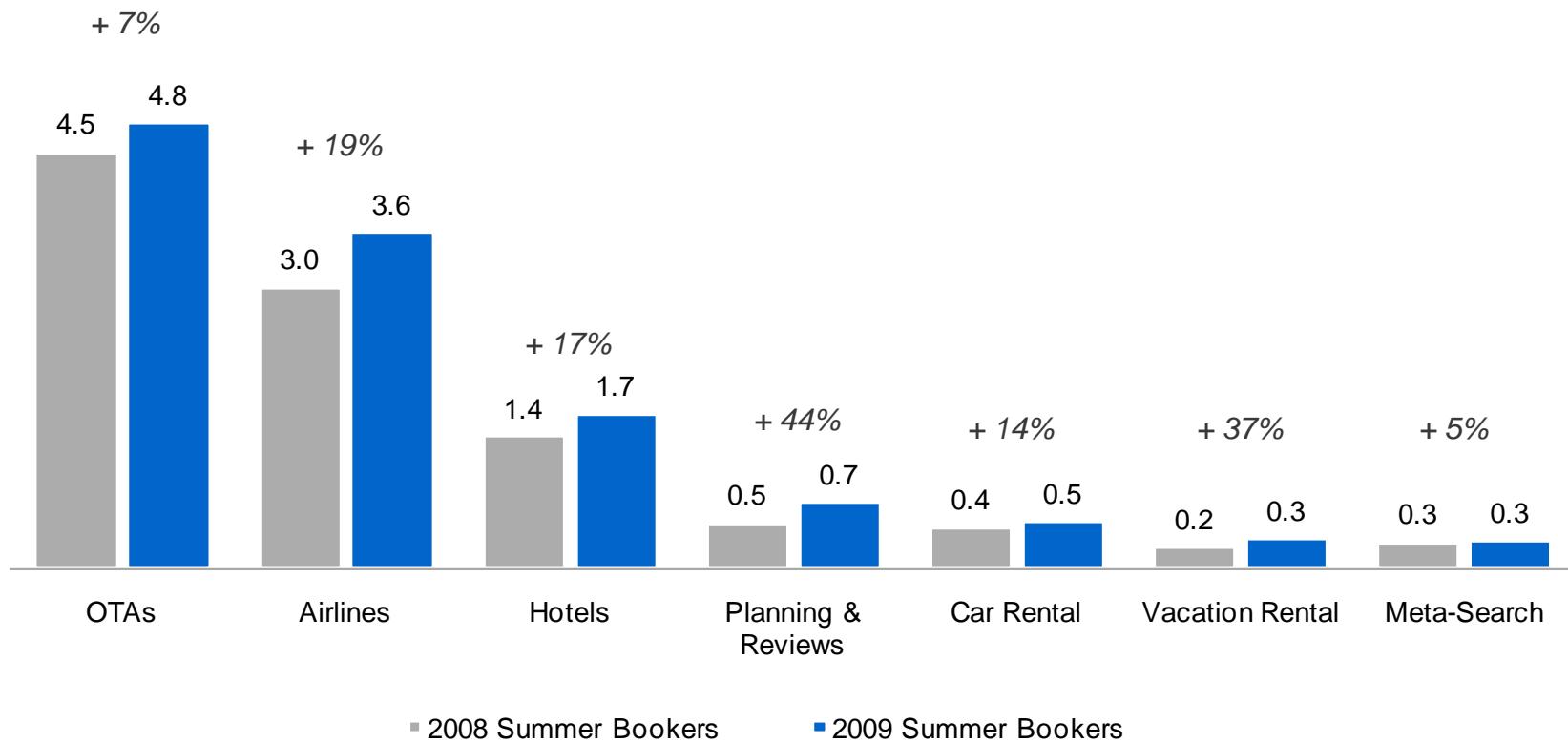
Average Site Visits to Each Type of Site

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

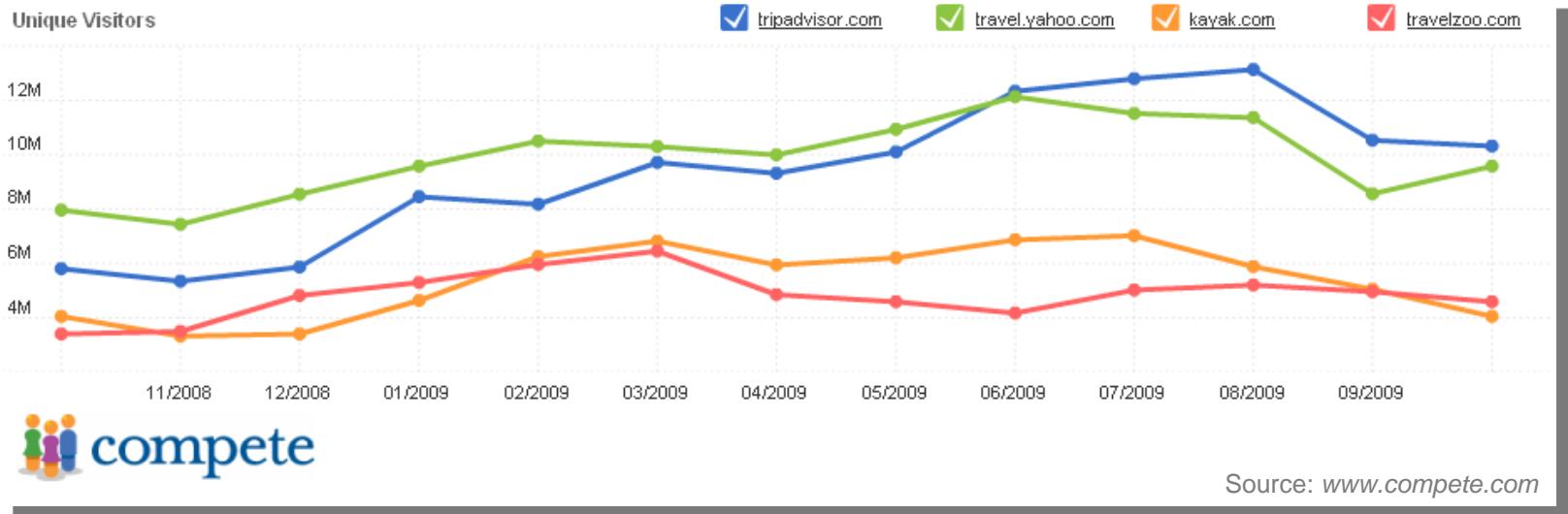


Time Researching is Up Across All Categories

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

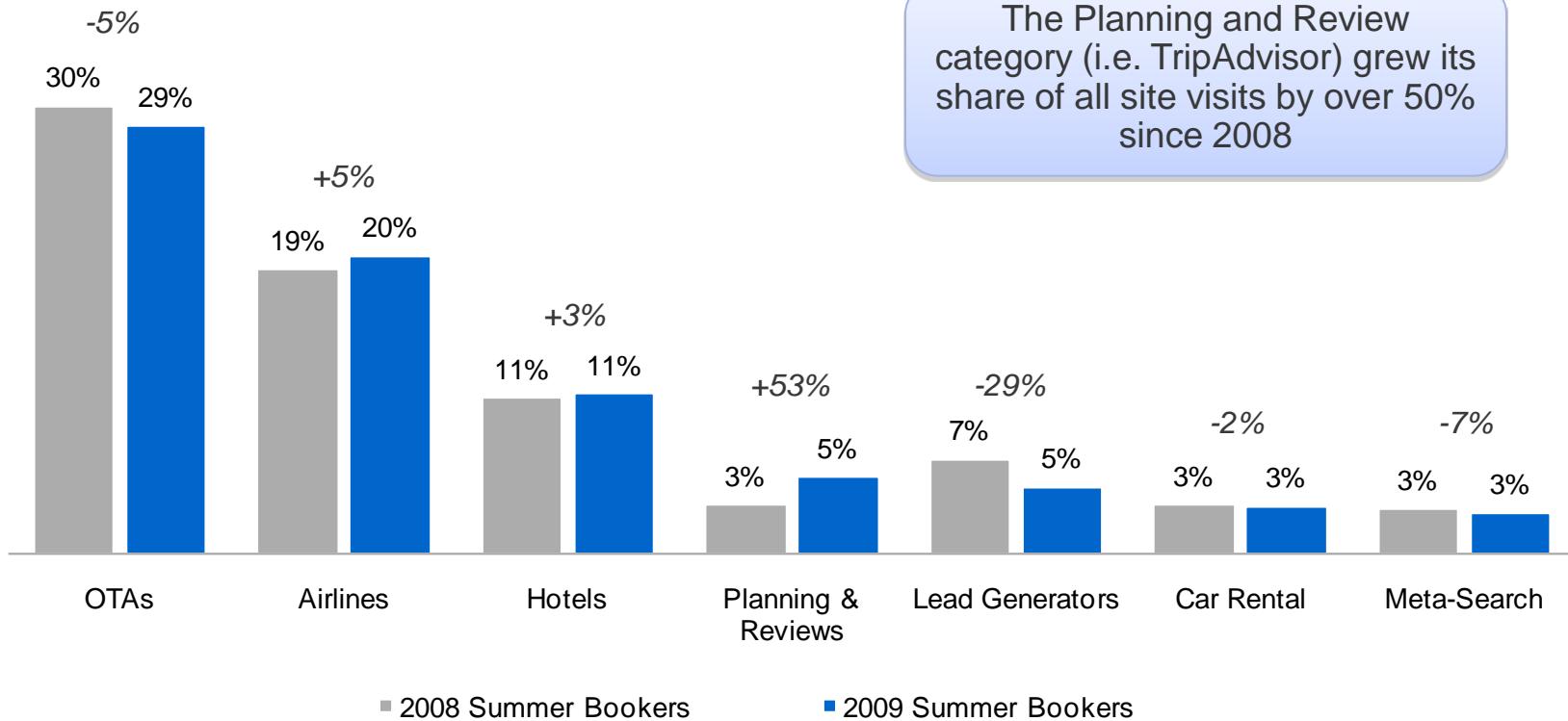


TripAdvisor Passed Yahoo! Travel as Most Visited Travel-Related Site



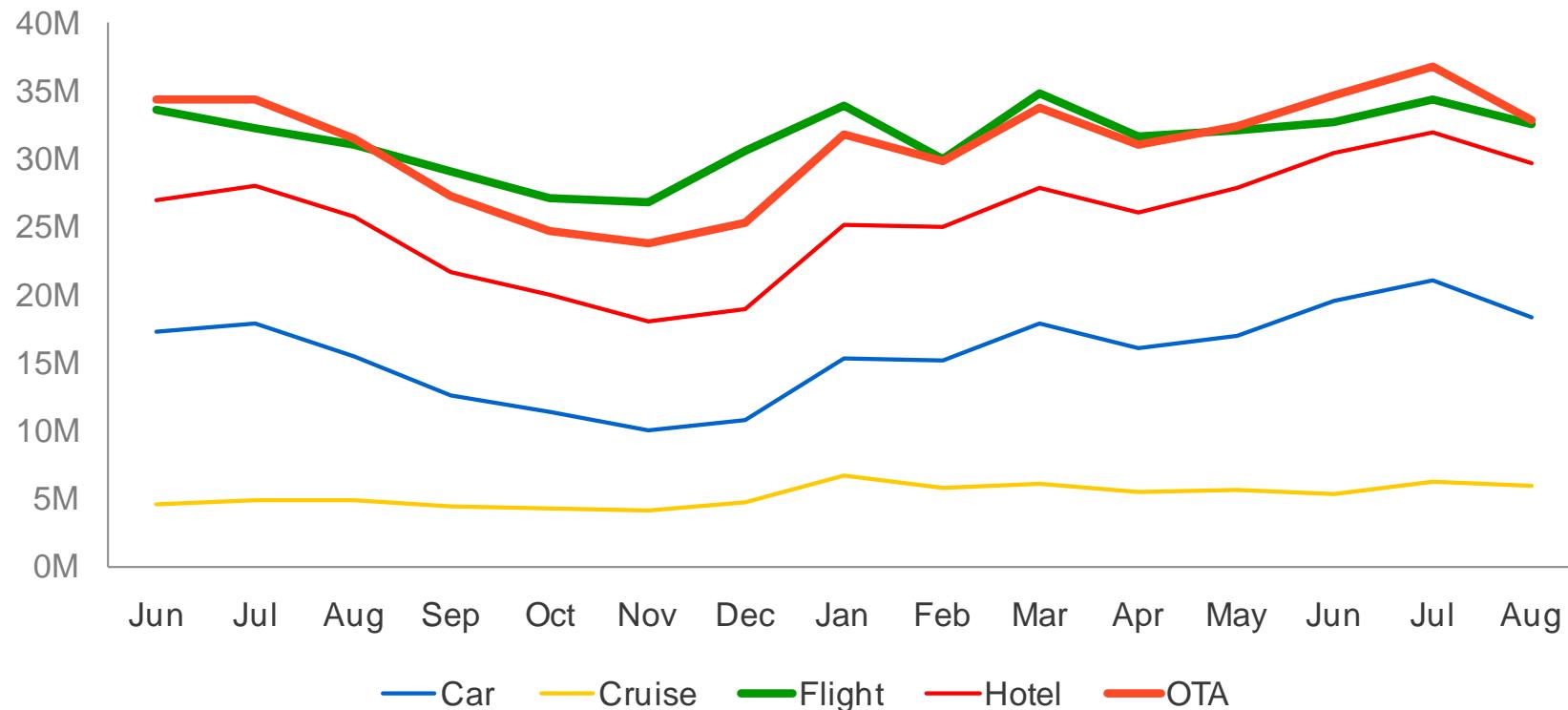
Travel Shopping Involves a Wide Variety of Sites

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



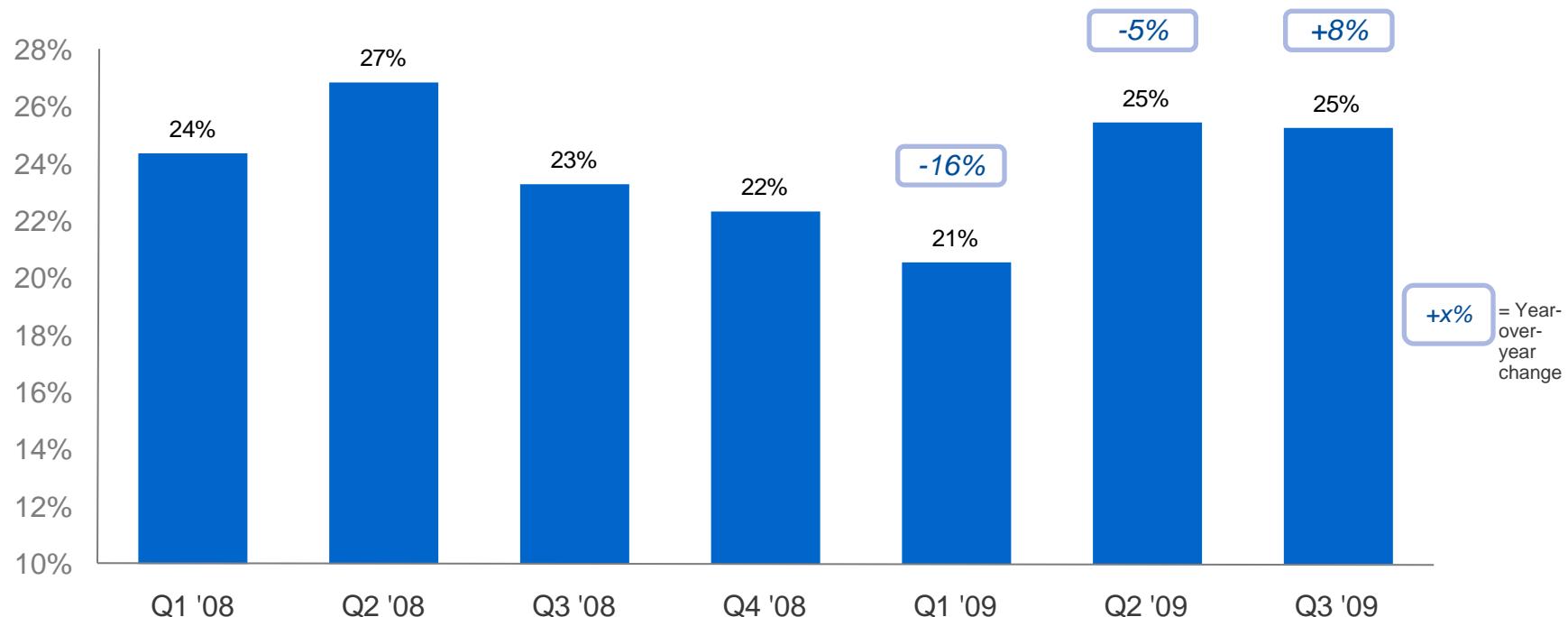
OTA Volume Passed Airline Volume in Q2 and Q3

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



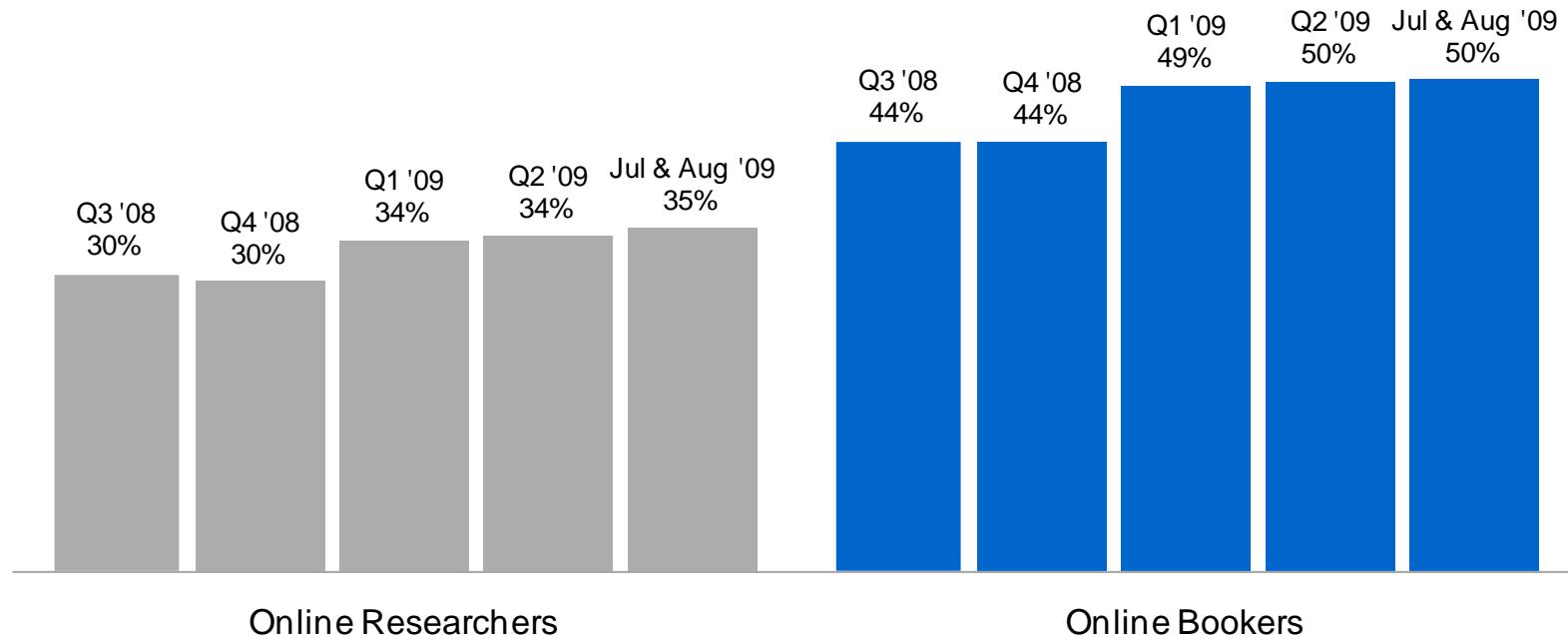
OTA Flight Booker Share Boosted by Fee Cuts

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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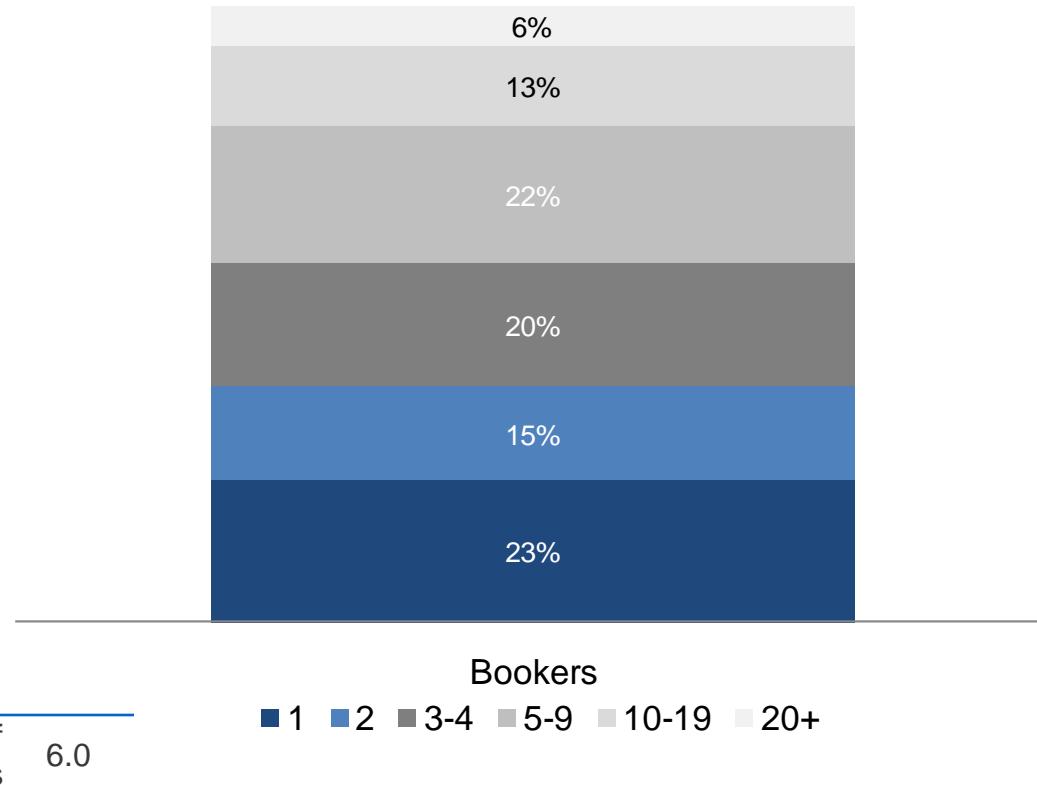
3 Consumer Search Process

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)



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

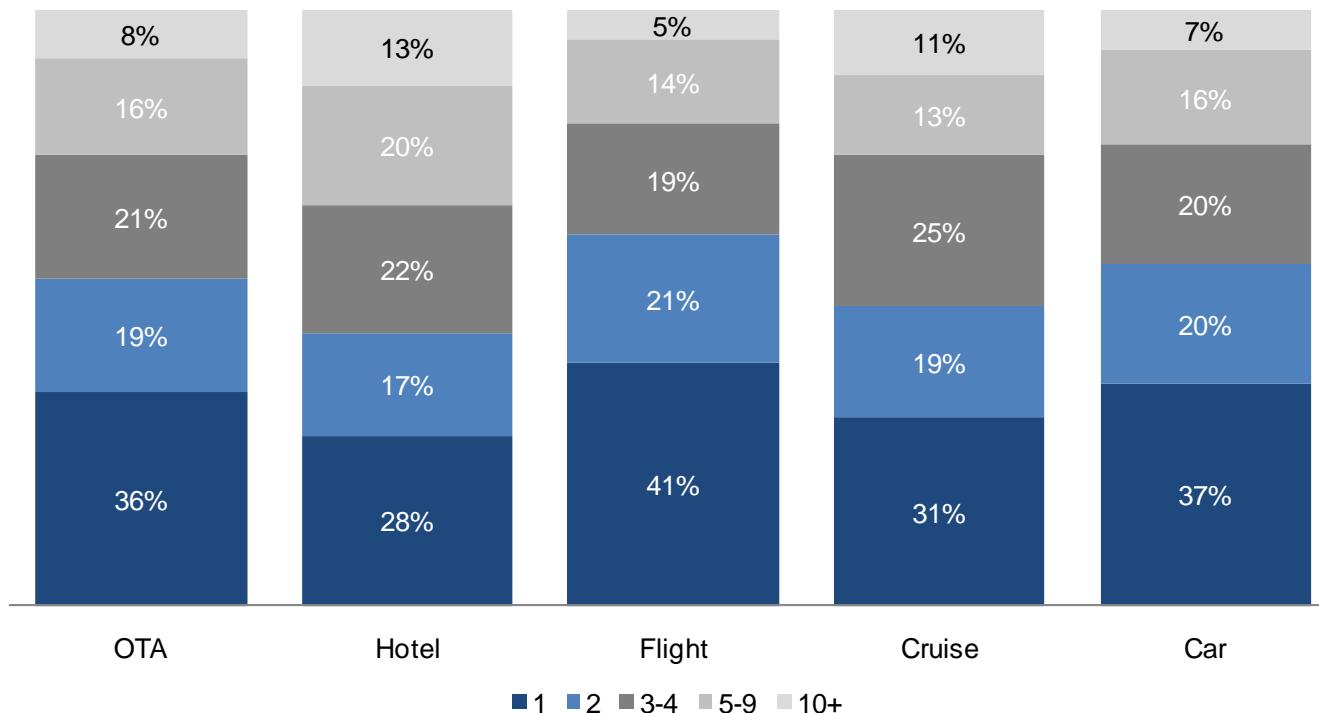
Base: Travel bookers from Jan – Jul 2009; Total query volume among travel bookers: 53.2M

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Hotel Bookers the Most Frequent Searchers

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



Average # of queries

3.9

4.7

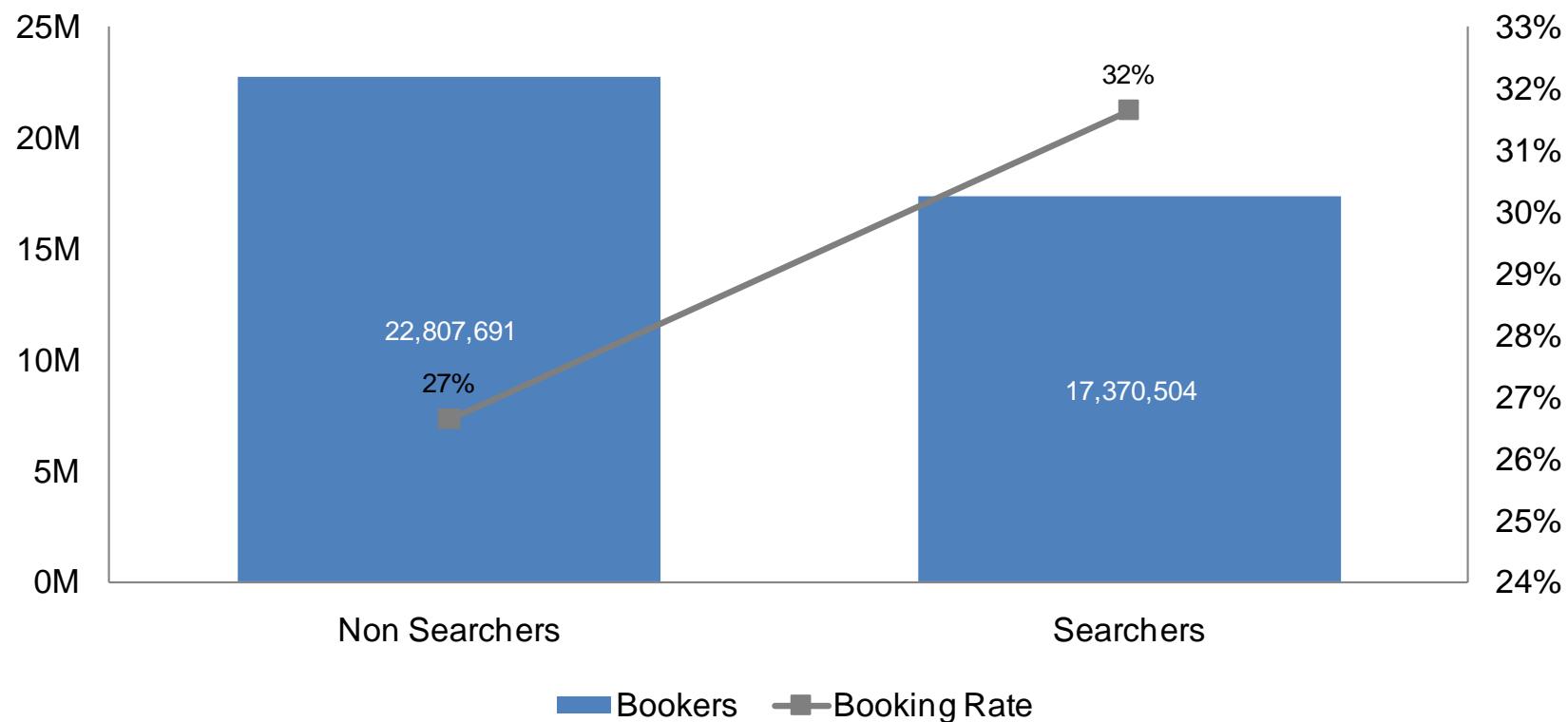
3.3

4.4

3.7

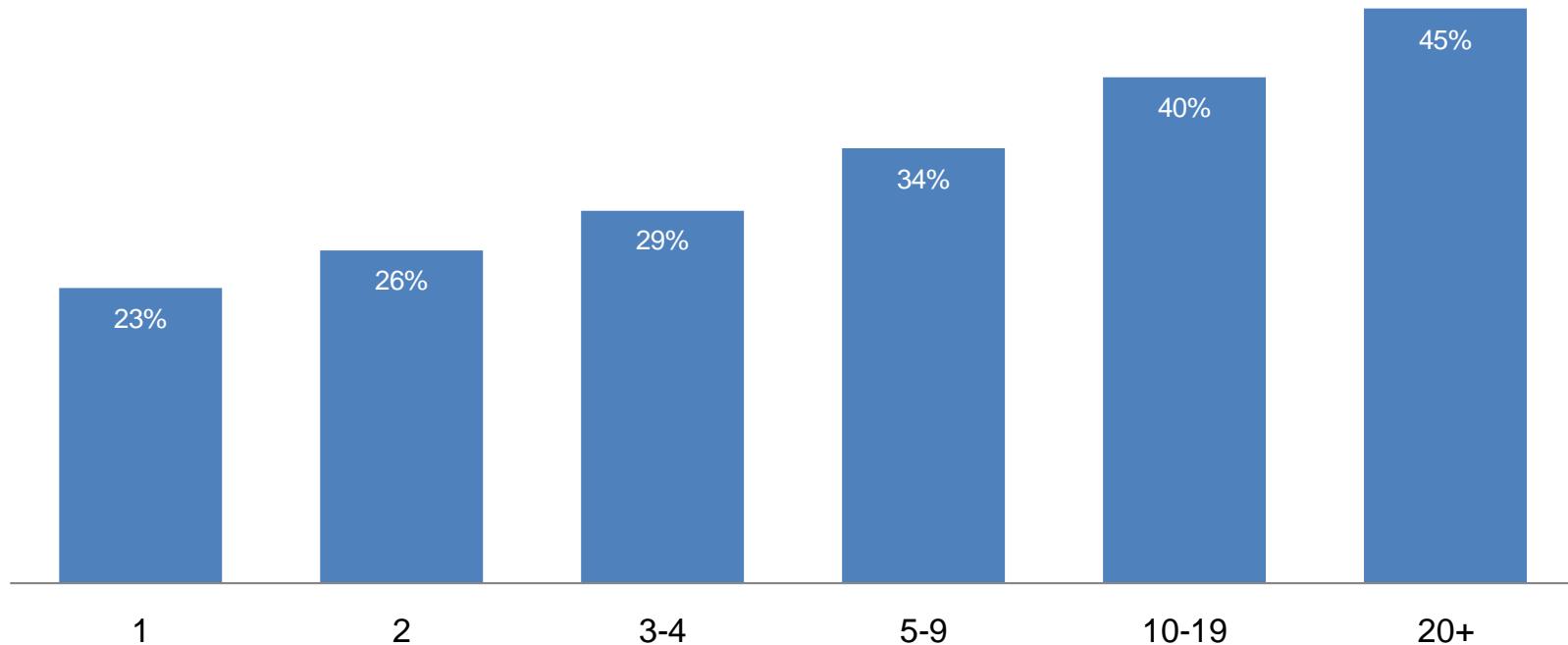
Traffic from Search More Likely to Book

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



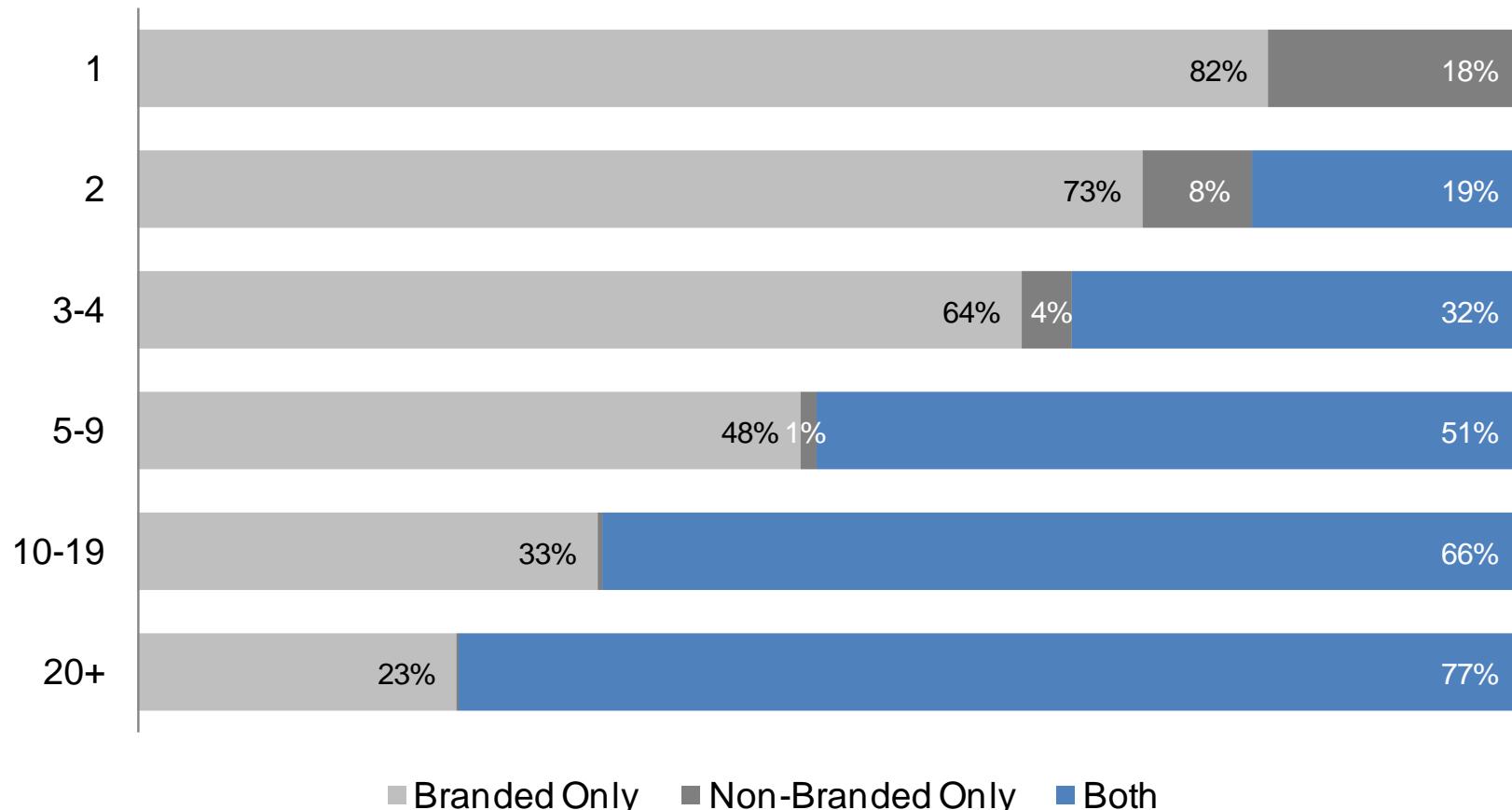
More Queries Equates to Higher Booking Rate

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



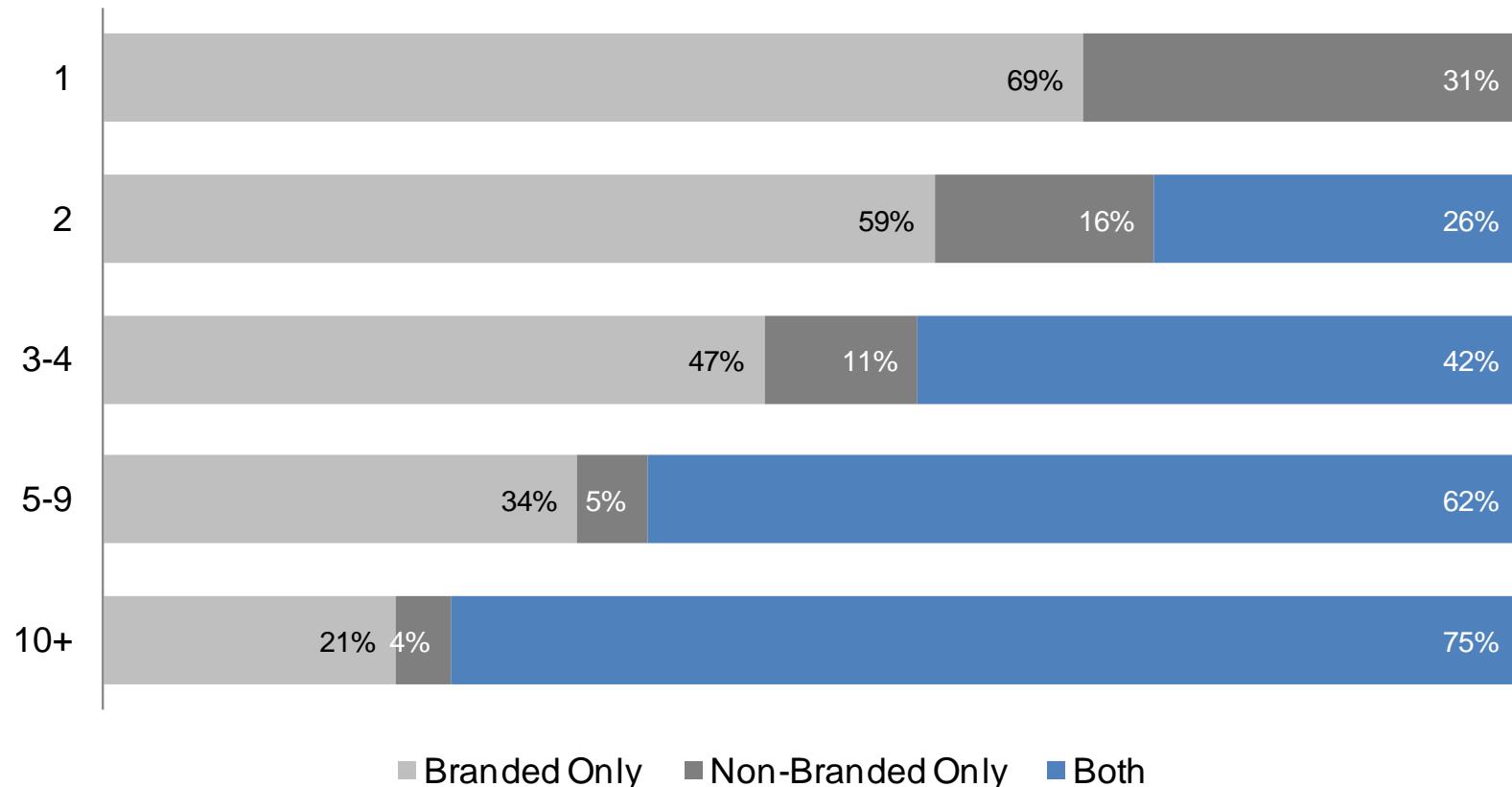
Heavy Searchers Use Both Brand & Non-Brand

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



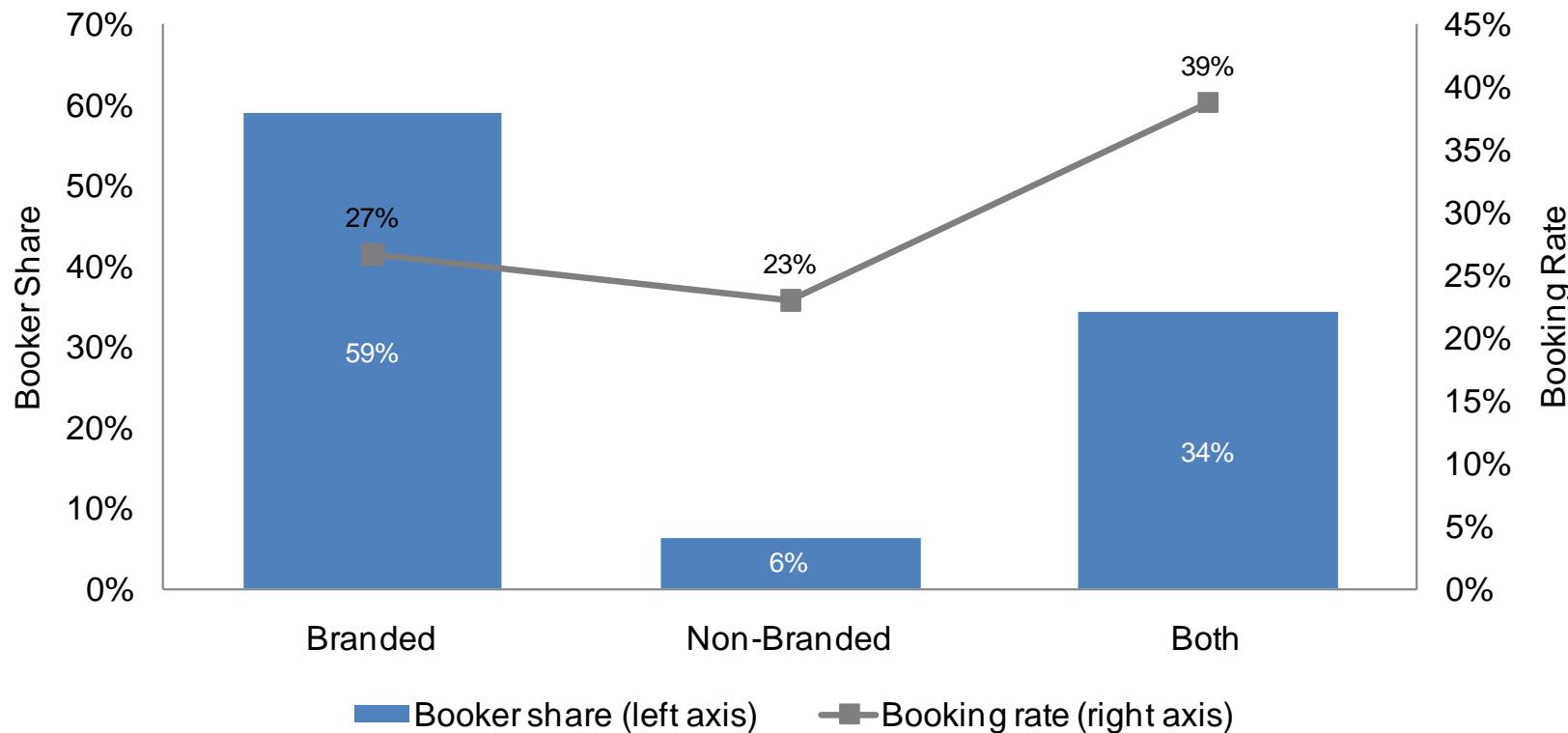
Frequent Flight Searchers Trend Towards Using Both Brand and Non-Brand Terms

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



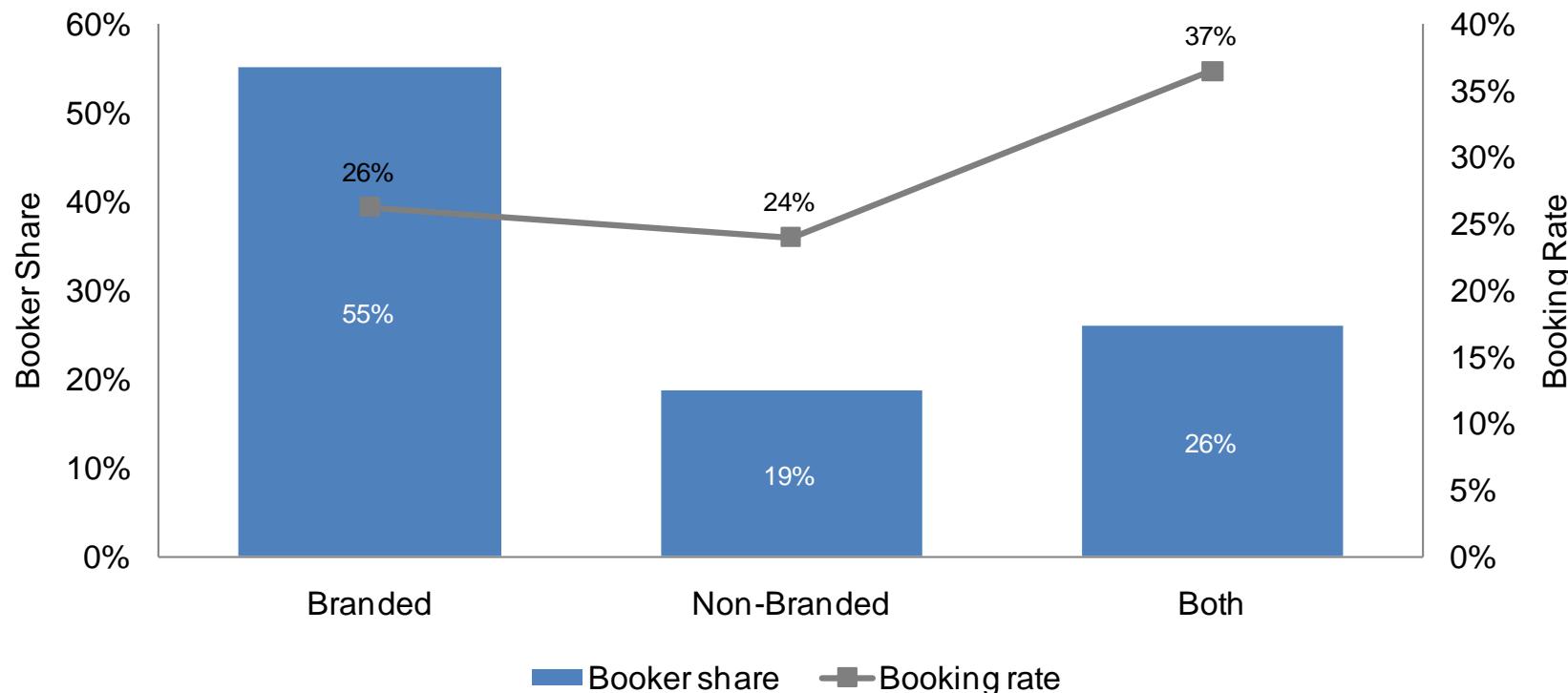
Those Searching Both Generic and Brand Terms Most Likely to Book

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



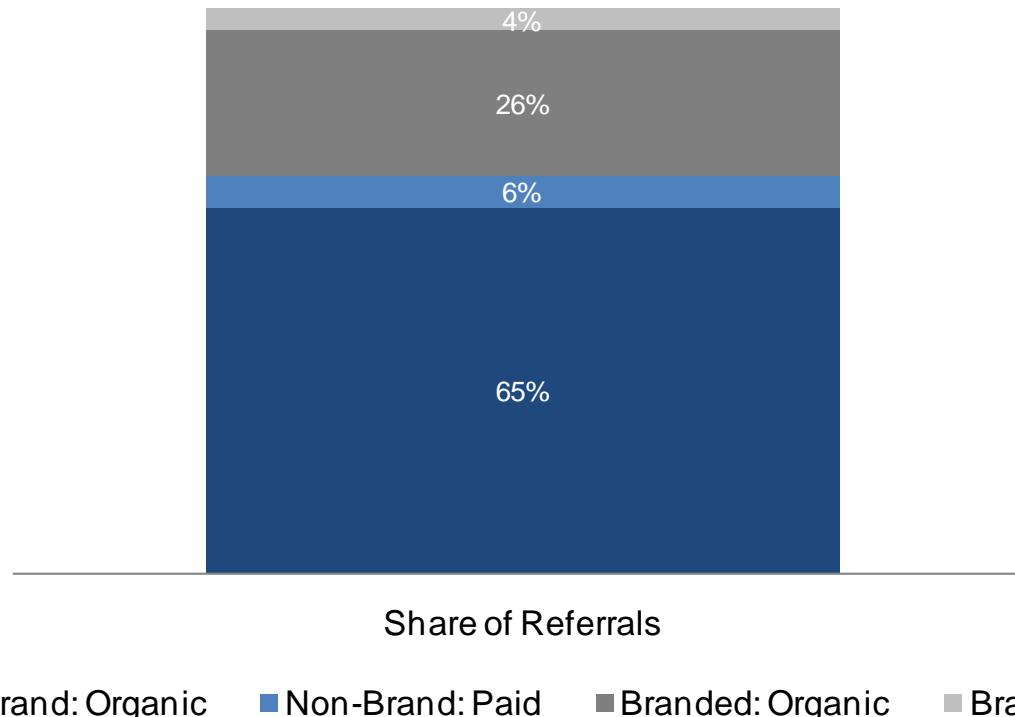
More Flight Searchers Stick with Non-Brand Terms Only

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



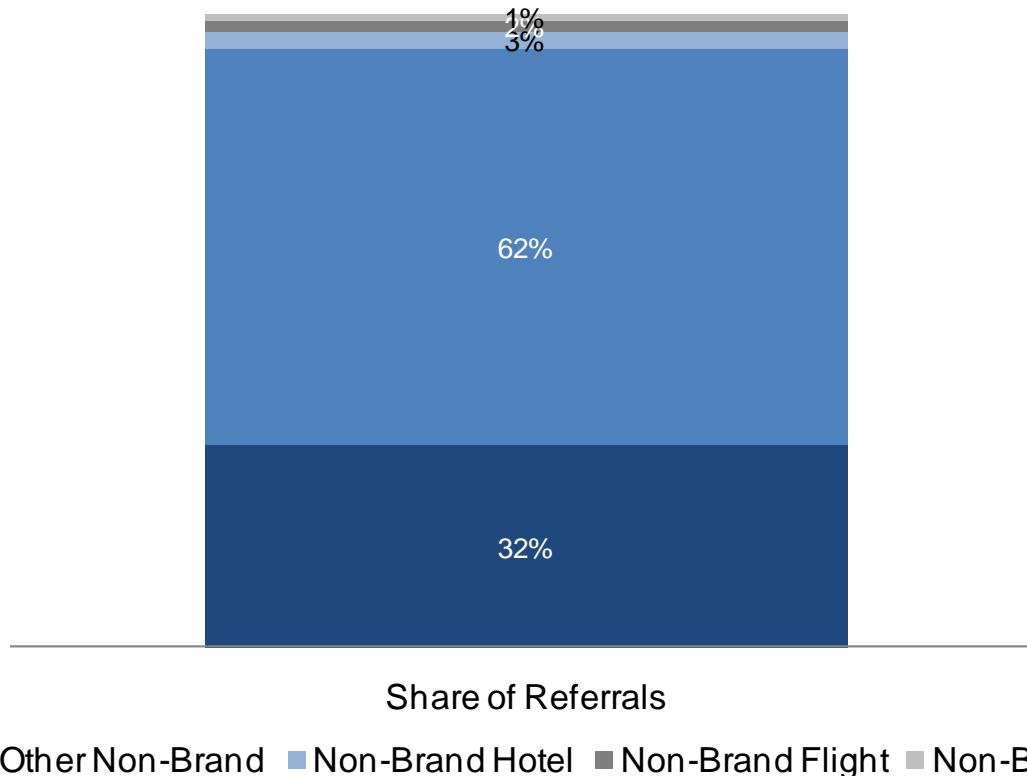
1 in 10 Search Clicks is Paid

Search Referrals by Term Type
(Jan – Jul 2009)



Most Referrals are Based on Non-Brand Terms

Search Referrals by Term Category
(Jan – Jul 2009)



Paid Clicks on Brand Terms Convert Much Better than Organic

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



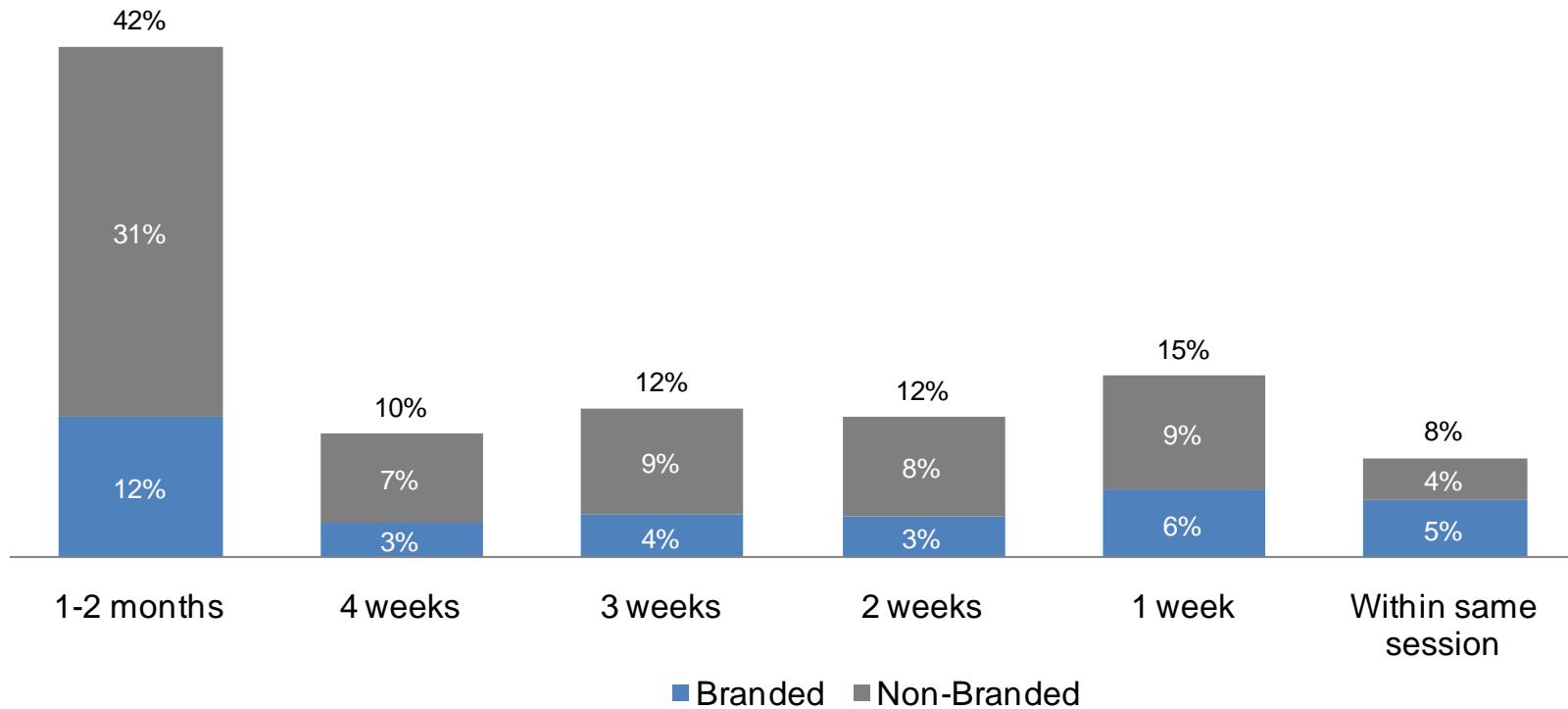
Paid Flight Clicks Convert at Nearly Same Rate as Organic

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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