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Traveler's Road to Decision 2009: Airlines

Google/OTX
U.S., July 2009

Research Methodology

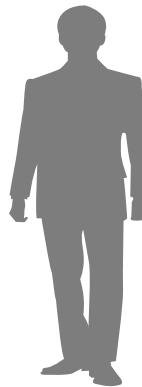
- Category covered: Airline
- Survey of 5,002 consumers who have traveled at least once for personal/business purposes in the past six months
- An augment of 1,500 affluent personal travelers was also recruited
- Partnered with OTX; interviews conducted 4/10 – 4/27

TRAVELER TYPES DEFINED



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Personal Traveler
has taken at least one trip for leisure in the past 6 months



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Business Traveler
has taken at least one trip for business in the past 6 months



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Affluent Traveler
has taken at least one trip for leisure in the past 6 months and has a household income of \$150K+

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Source: Google & OTX, The Traveler's Road to Decision; June 2009

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Key Findings

1 The Internet is the most used tool for researching air travel.

2 People are most likely to go direct to an airline's website to book flights, especially wealthier travelers.

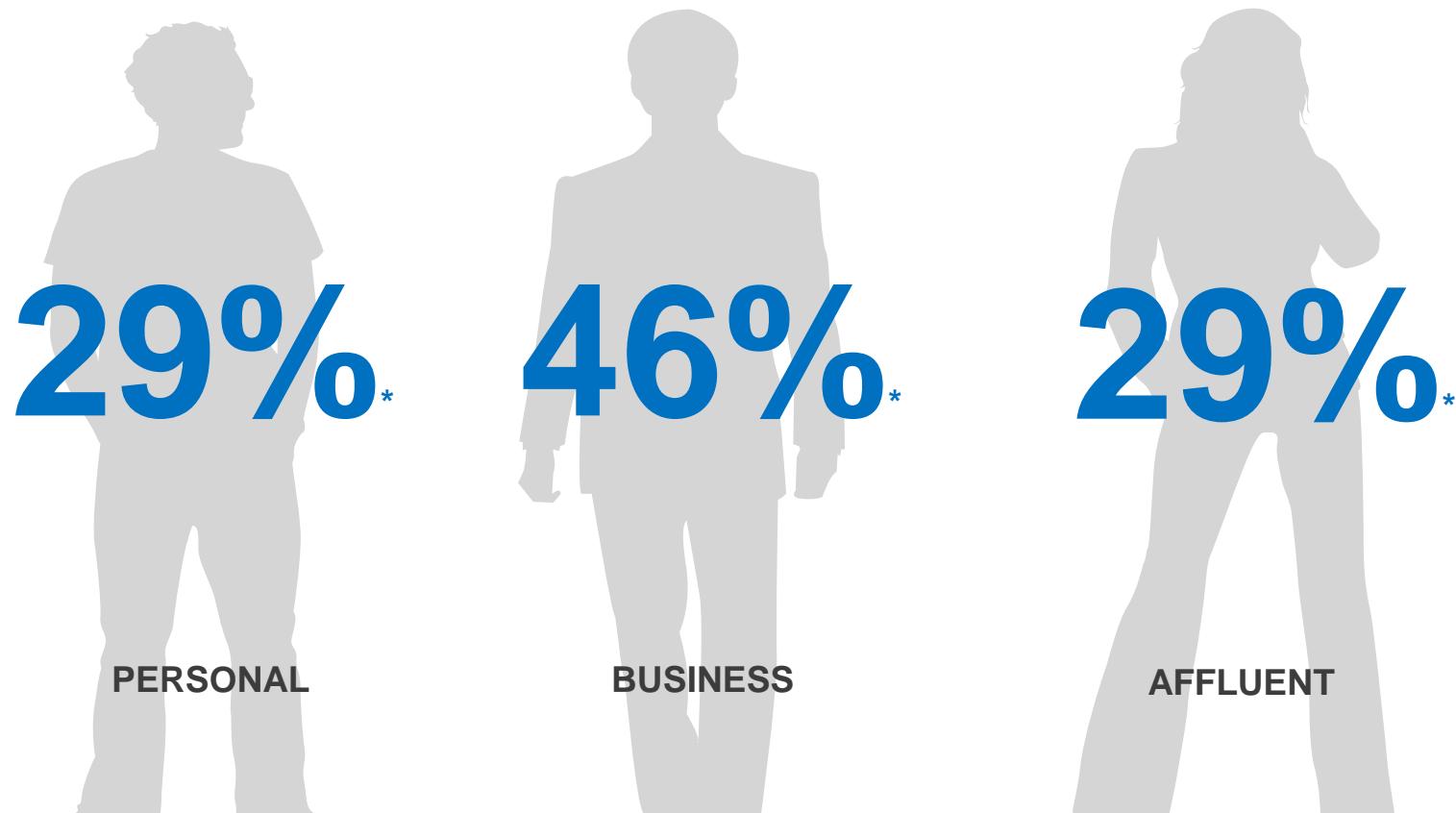
3 Comparison shopping for flights is commonplace, even among wealthy travelers. Expedia, Travelocity and Orbitz are used most often.

4 Price and flight convenience are the top considerations for bookers. Recommendations and reviews are among the least important.

5 The majority of travelers check in for flights online to save time.

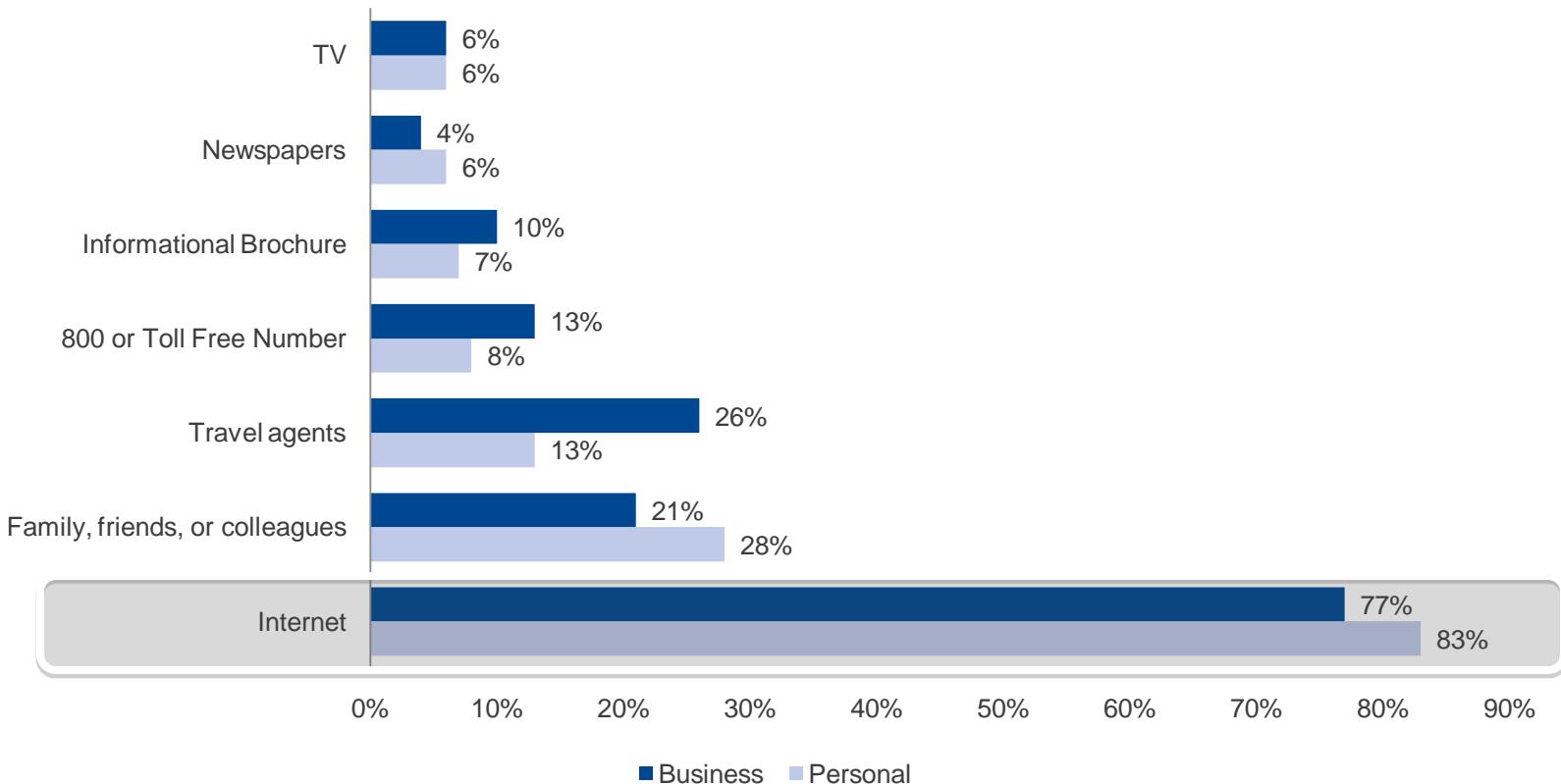
6 Southwest, American and Delta are the favorite airlines for personal, business and affluent travelers.

Business Travelers Rent Cars More Often than Personal Travelers & Affluents



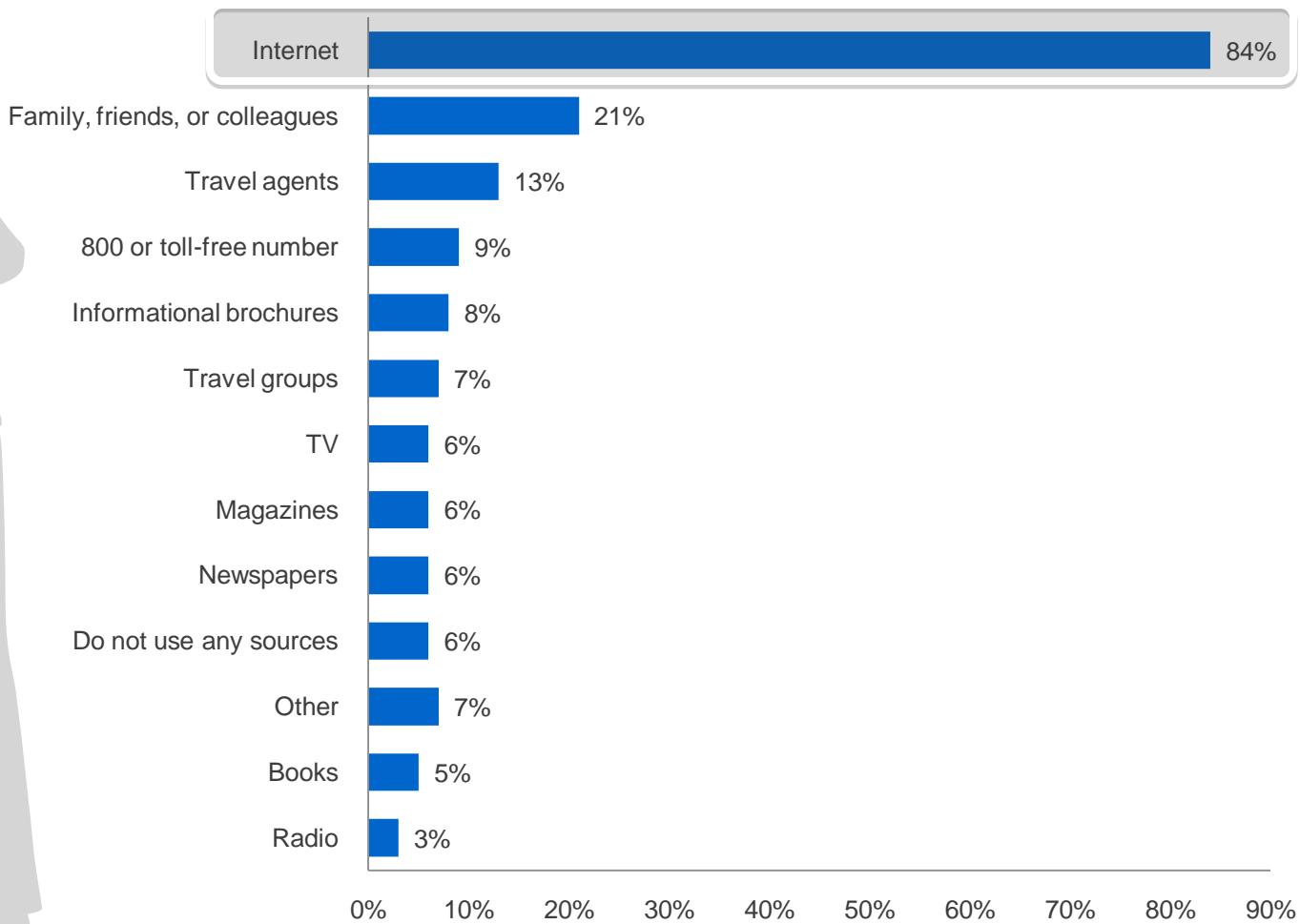
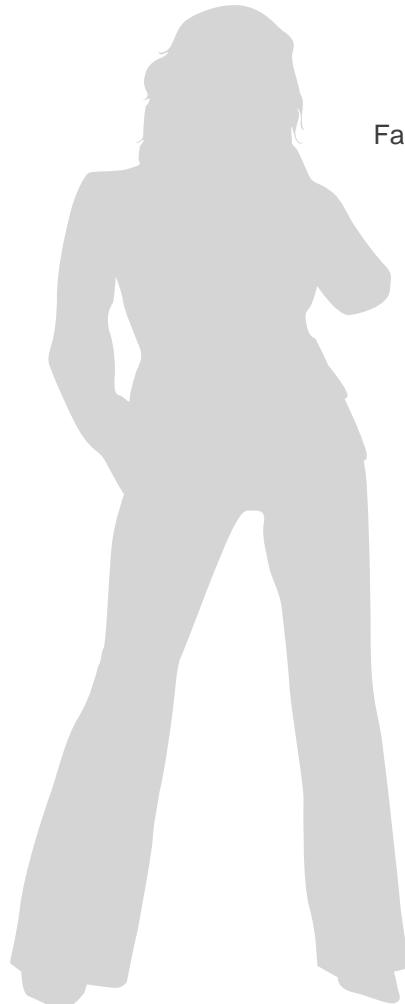
When you drive to a travel destination, how often do you rent a car rather than driving one that you/someone in your household owns?

The Internet is the #1 Source Used to Choose an Airline Among Both Business & Personal Travelers



Business travelers tend to use offline sources of information more often than leisure travelers.

Affluents go Online to Make Flight Decisions, Too



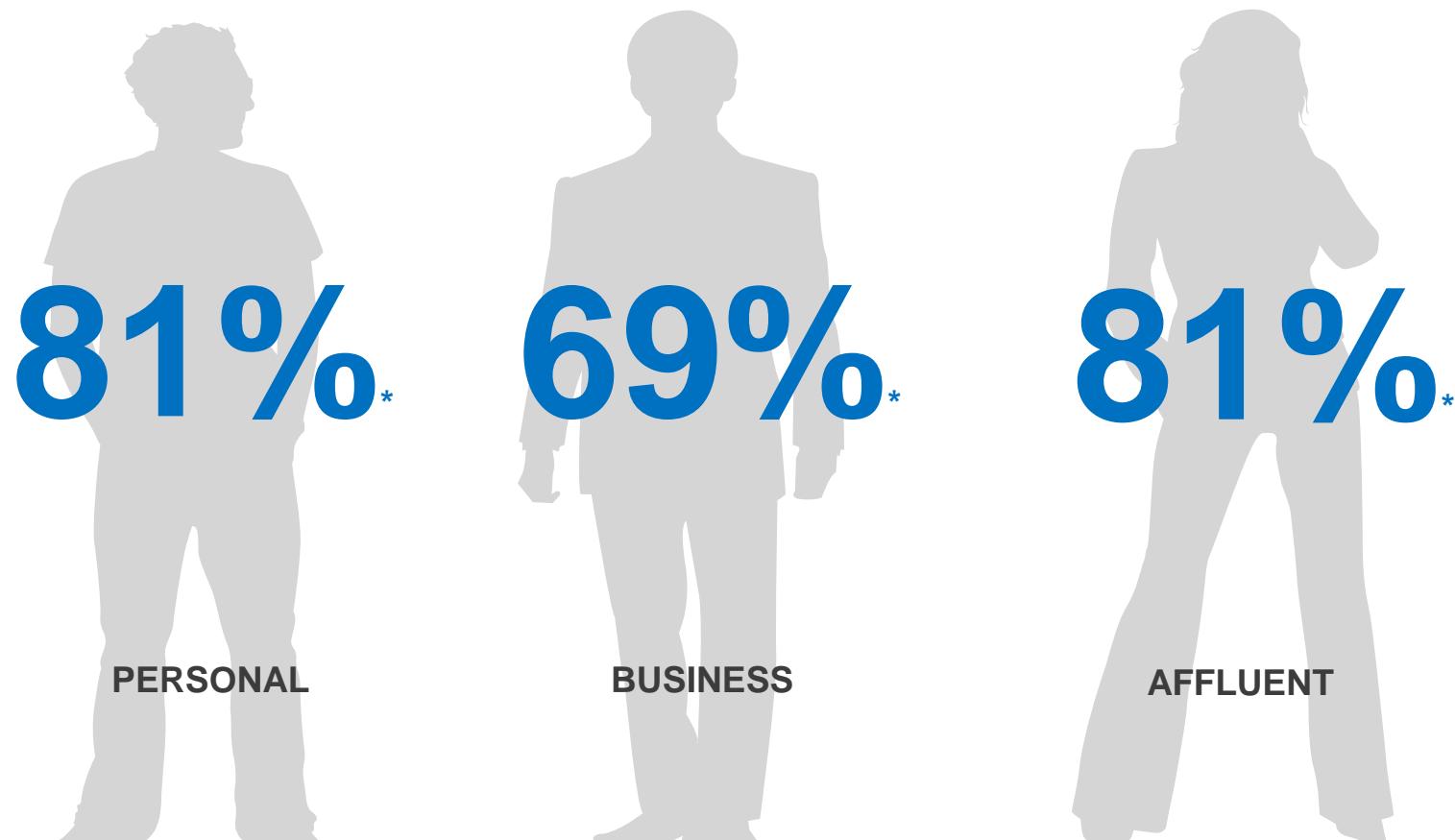
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(QA1) Which of the following sources, if any, do you typically use to decide which airline to use for a personal/business trip? (n=824)

Source: Google & OTX, The Traveler's Road to Decision; June 2009

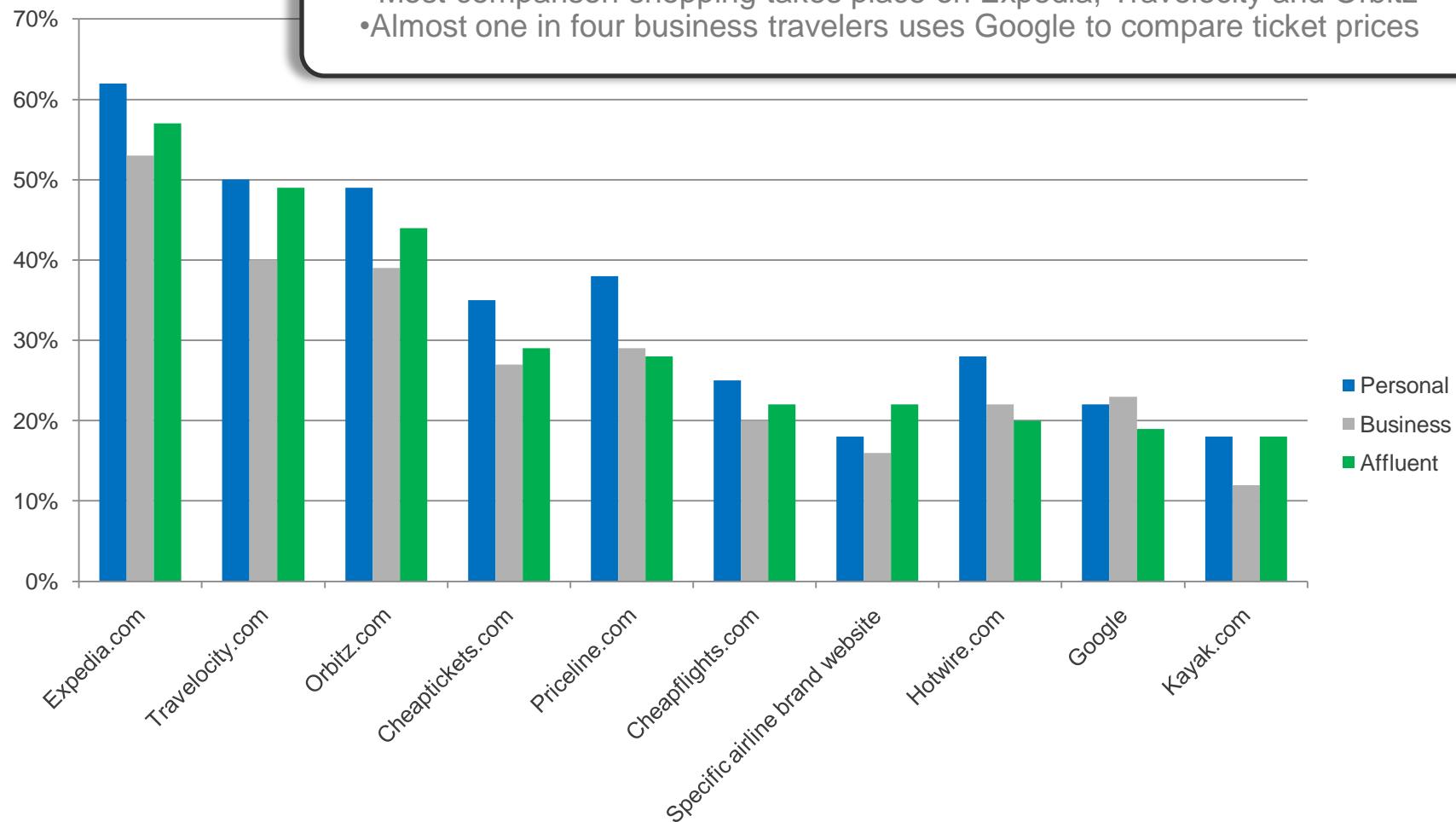
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The Majority of Consumers Go Online to Comparison Shop Before Booking



Personal travelers are more likely to comparison shop than those traveling for business, even at high income levels.

Most Comparison Shopping Reportedly Happens on OTA Sites



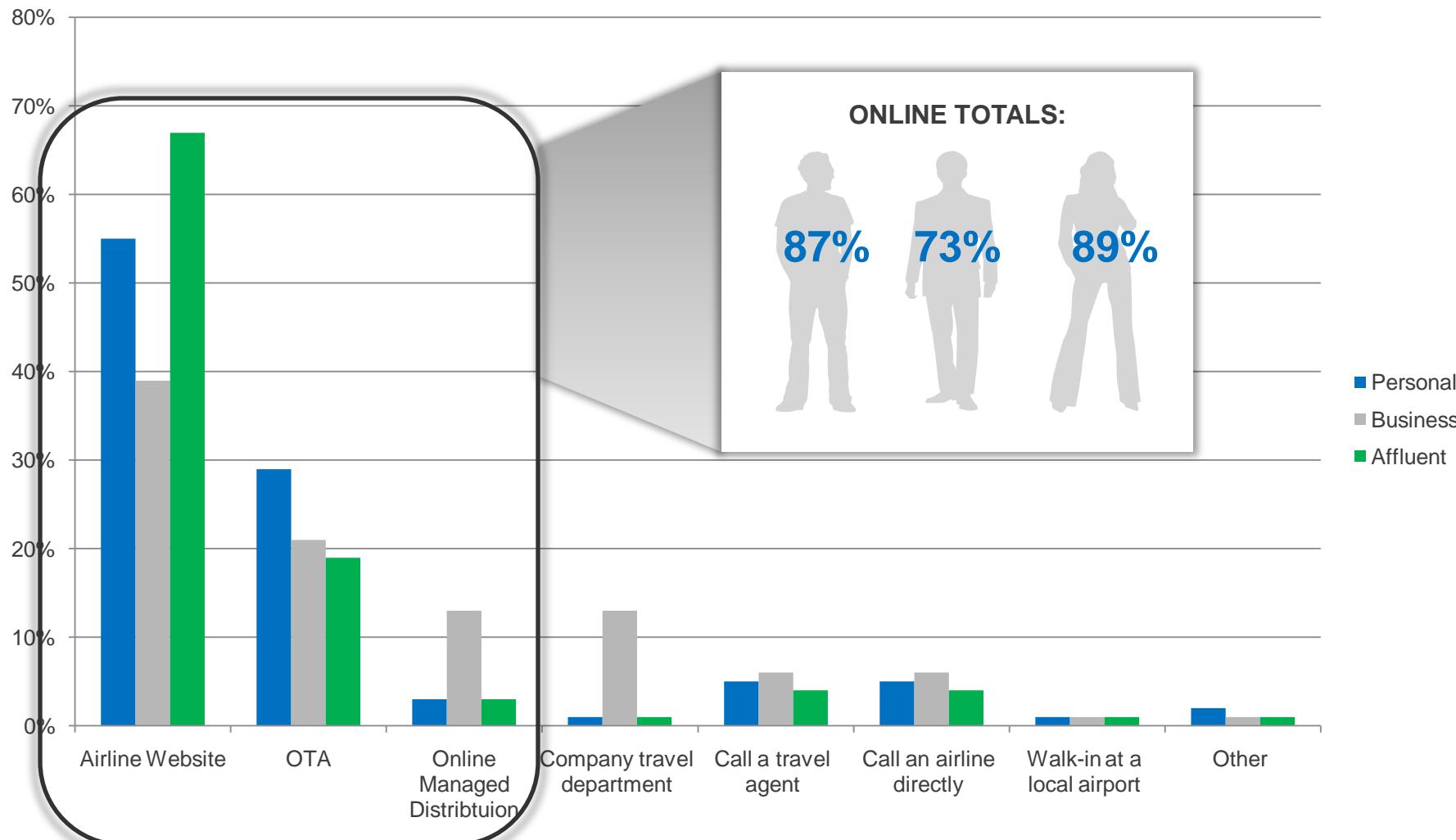
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Base: Have done airline comparison shopping online
(QA8) Which of the following websites do you use when comparison shopping for airline
tickets for personal travel?

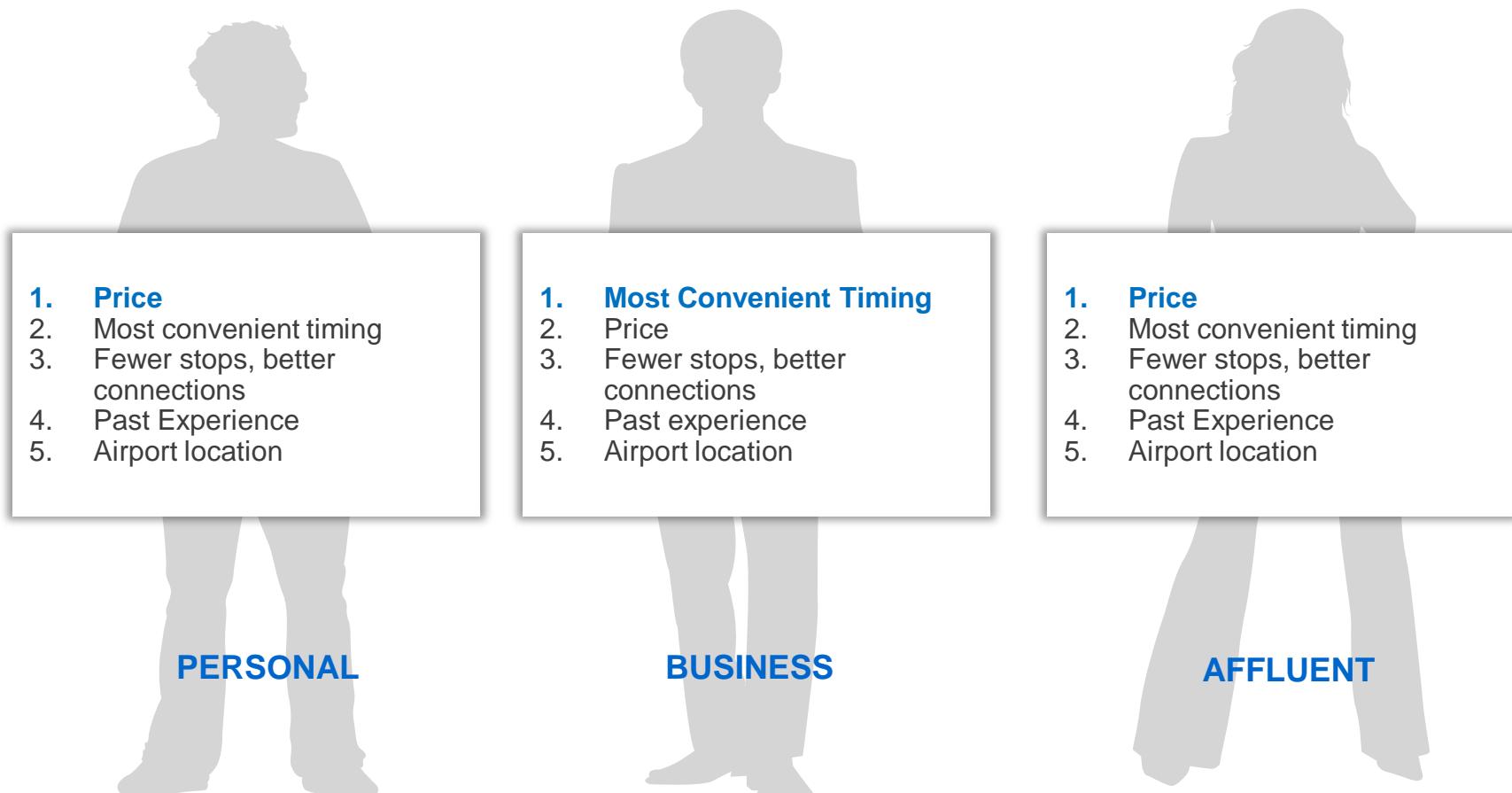
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When it Comes to Booking, Online is the Preferred Method Across All Segments

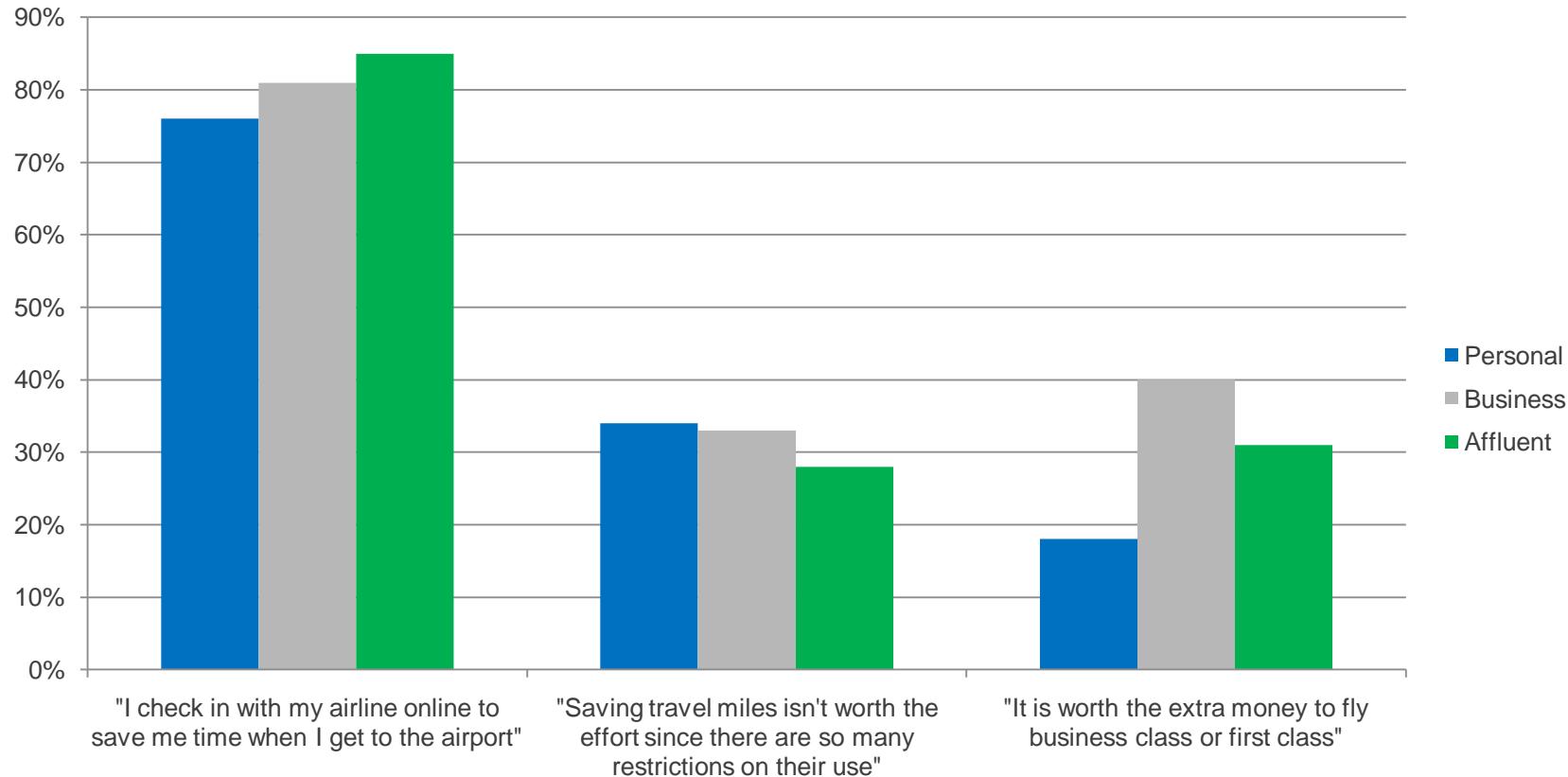


What's the Most Important Factor When Choosing Where to Book?



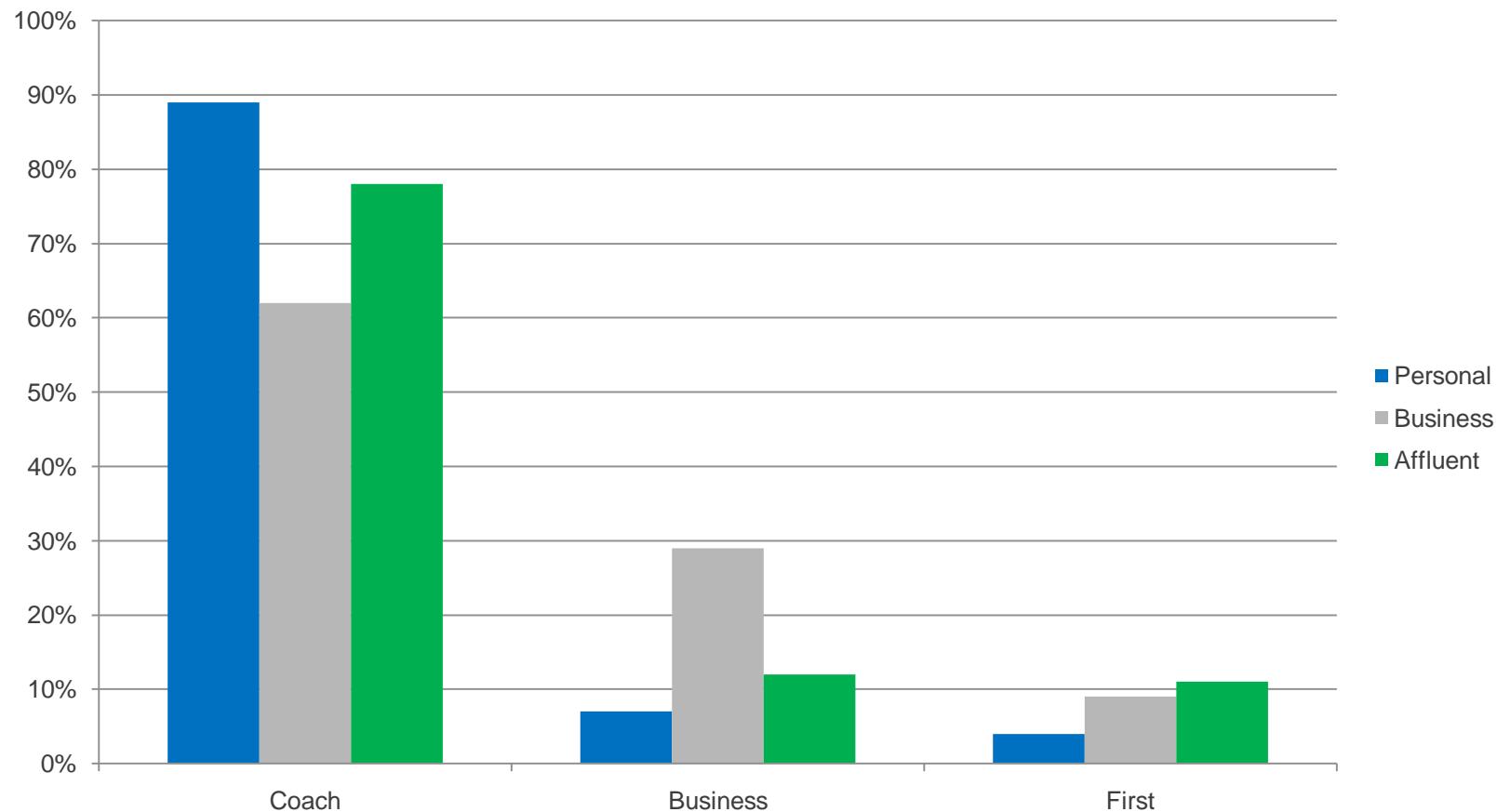
Price is significantly more important to personal travelers while convenience is more important to business travelers.

Most Travelers Check In Online to Save Time



Business travelers are more likely to think First Class is worth the extra investment.

Not Surprisingly, More Affluents Fly First Class than Typical Vacationers



Just 1 in 10 of personal vacationers typically travels first class, versus over a third of business travelers.

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