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Travel Cruise Consumers: How Online Research Affects Purchase

Google Compete
U.S., September 2010

Background and Objectives

Background

- Online research influences both online and offline bookings. However, there remain challenges in quantifying the role of the online channel – whether via search, display, or non-advertising content – in driving bookings.

Objectives

- Assess the online and offline resources shoppers use when shopping for and booking travel as well as the relative importance of different resources
- Quantify the impact online research has on consumer purchase (both online and offline)
- Analyze differences between bookers who purchase online and bookers who purchase offline

Methodology

Targeting and Screening

- A survey was launched to Compete panelists who were noted to be researching cruises online between December 2009 and April 2010
- Surveys were fielded to 617 Compete panelists in April/May 2010 targeting consumers who completed and qualified for the survey under the following requirements:
 - Respondents who indicated they had conducted **online** research for cruises within the past twelve months OR Respondents who indicated they had taken at least one cruise in the past five years
 - Respondents indicated they researched or cruised for personal (non-business) travel

Significance Testing

- For 2-variable significance testing, two asterisks (**) indicates significance at the 95% level and one asterisk (*) indicates significance at the 90% level
- For multiple variable significance testing, uppercase letters indicate significance at the 95% level and lowercase letters indicate significance at the 90% level
- Base sizes under 30 were removed from the study and any base sizes between 30-50 marked as low sample

Searcher vs. Non-Searcher Segment Definition

- A “Searcher” is defined as a respondent who was referred to a cruise supplier website or OTA cruise path within the 60 days prior to booking (based on observed online clickstream behavior and not self-reported)

Key Takeaways

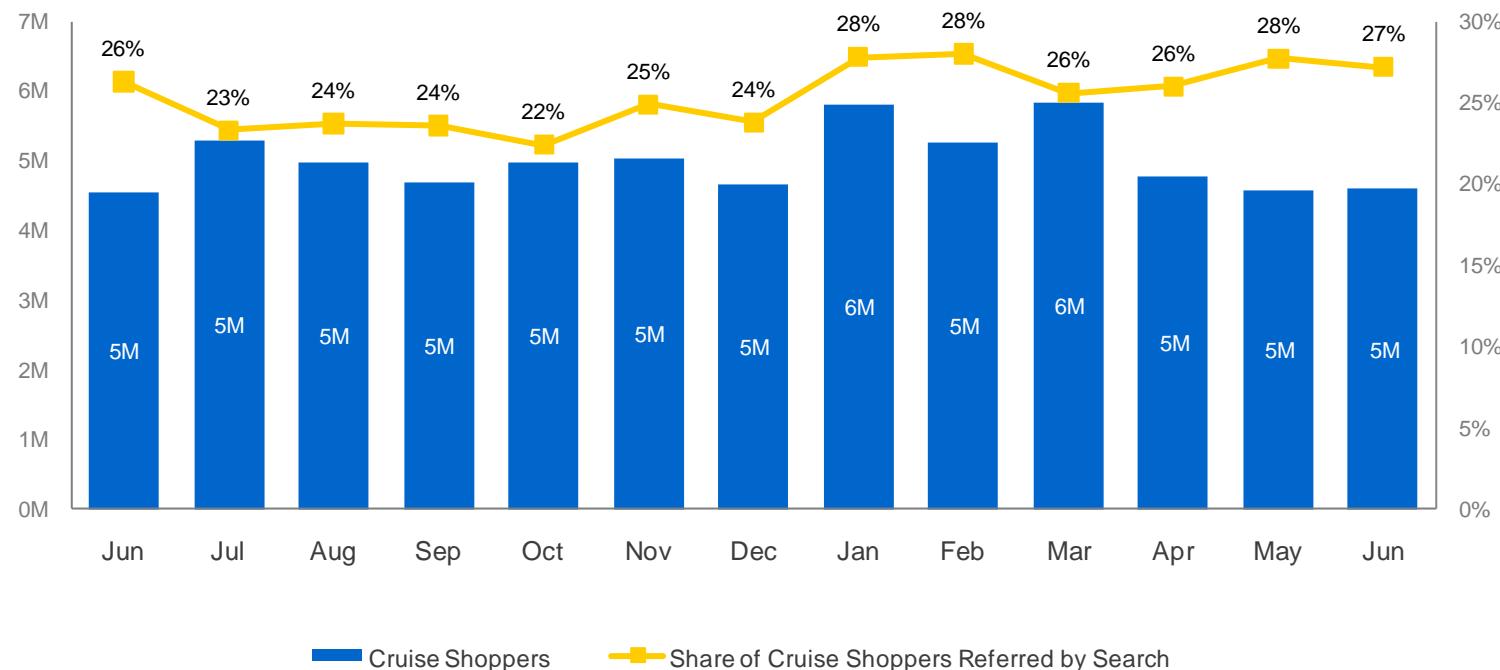
- One quarter of all cruise shoppers indicated researching exclusively online
 - Half of all cruise shoppers reported using friends, family and colleagues as an offline resource
- Half of cruise shoppers reported using search engines in their research
 - 83% of cruise shoppers indicated that they researched on cruise operator websites
- Shoppers who were observed using a search engine during their research were more likely to book than shoppers who did not use a search engine
- Two-thirds of all cruise shoppers booked offline
 - The majority of shoppers booked their cruise over the phone
- Online and TV advertisements were the most-likely to be recalled by shoppers
- The ability to find cruises easily online was the leading reason bookers chose to book with a specific website
 - Finding the lowest prices was second, followed closely by the ability to view promotions and discounts offered by the website
- A third of all cruise shoppers indicated researching for 4 weeks or more
 - Shoppers of family cruises were more apt to spend more time researching
- Cruise bookers demonstrated heavier cross-shopping activity in the fall months



Cruise Market Overview

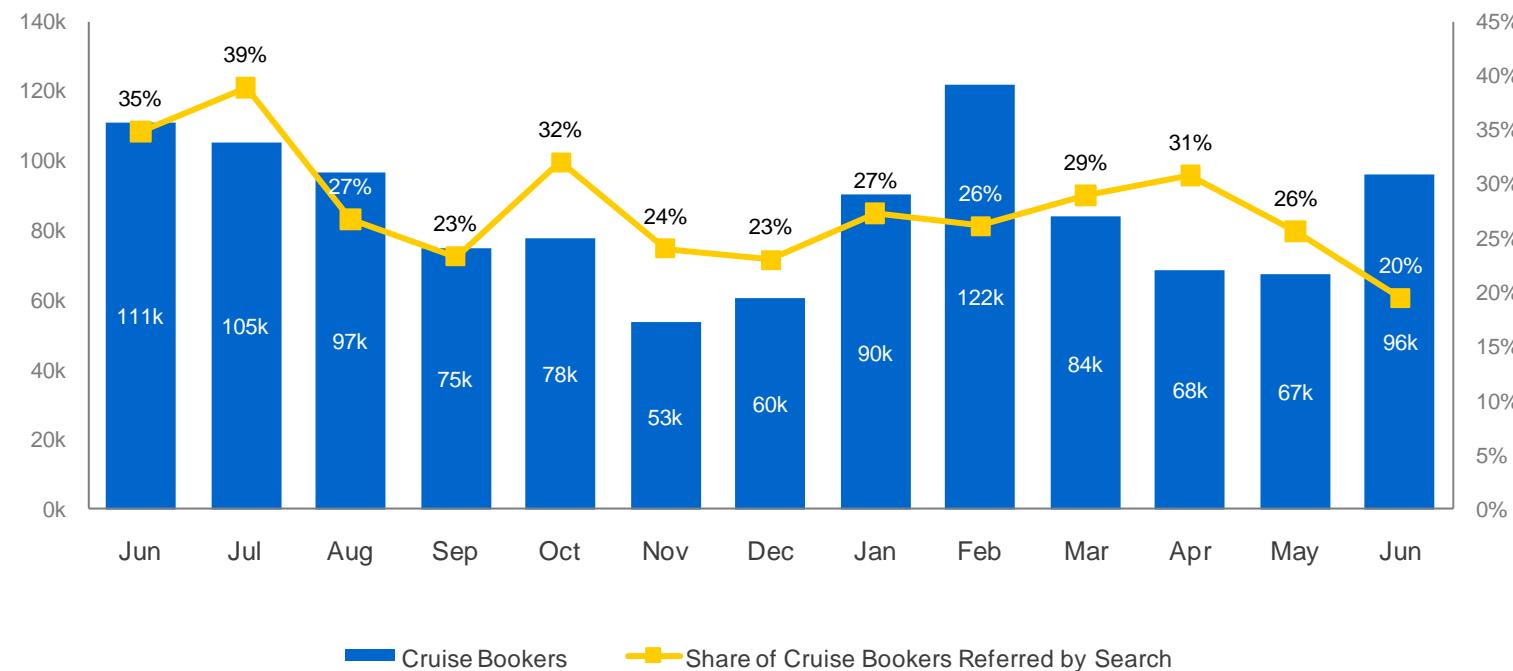
1 in 4 Cruise Shoppers are Referred by Search

Aggregate Online Cruise Shoppers & % Search Referred to a Cruise Site
(Volume of Cruise Shoppers & Share that were Search Referred to a Cruise Site, Jun 2009 – Jun 2010)



Search Referred Cruise Bookers Was Mixed

Aggregate Online Cruise Bookers & % Search Referred to a Cruise Site
(Volume of Cruise Bookers & Share that were Search Referred to a Cruise Site, Jun 2009 – Jun 2010)



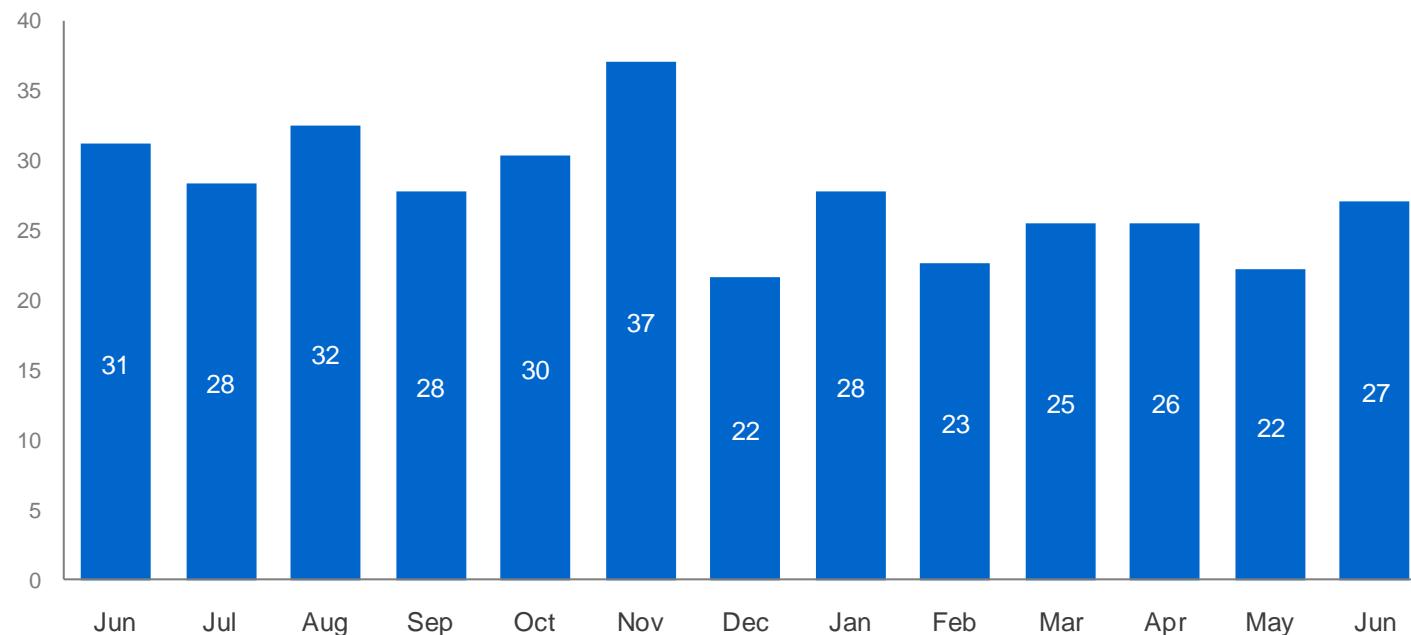
1 in 5 Cruise Shoppers are Referred by Google

Google's Share of Search Referred Cruise Shoppers & Bookers
(Share of Online Cruise Shoppers and Bookers, Jun 2009 – Jun 2010)



Heavy Cross-Shopping in the Fall Months

Sites Visited by Online Cruise Bookers
(Average Travel Sites Visited Among Cruise Bookers Within the Month of Booking, Jun 2009 – Jun 2010)

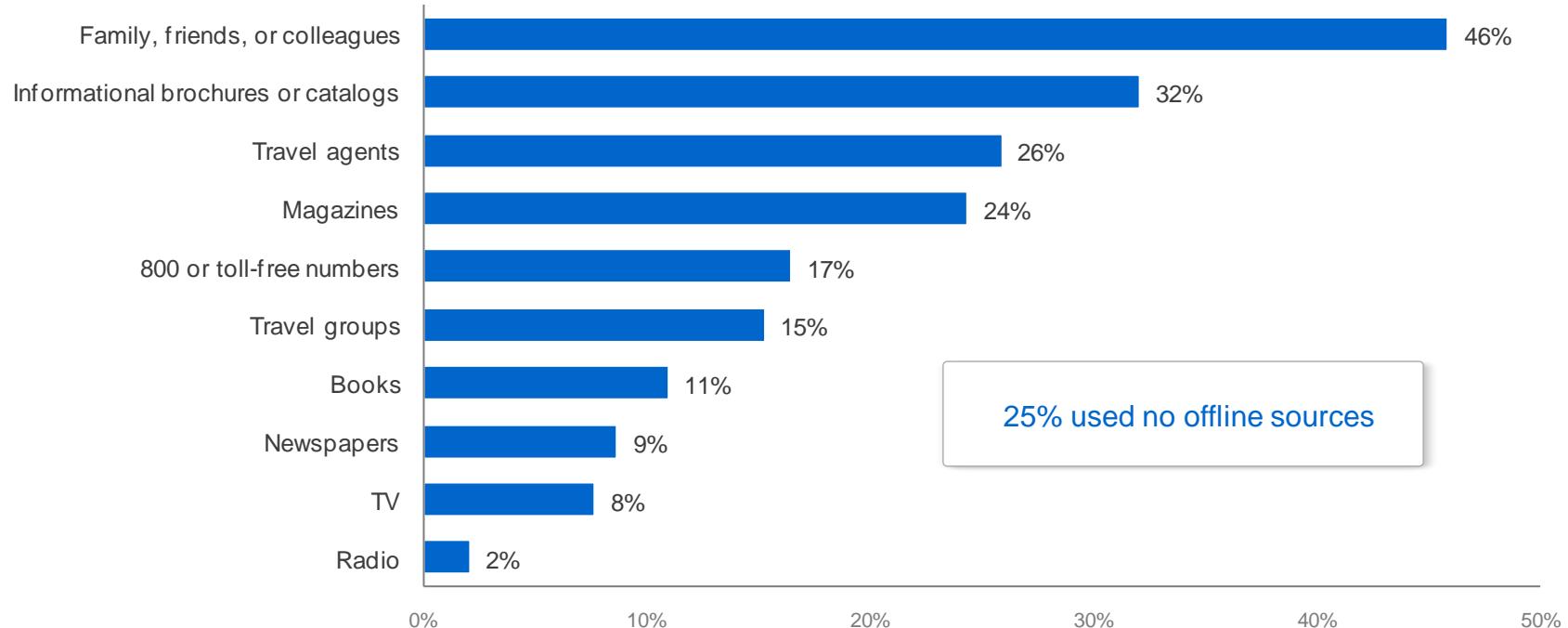




Booker Channel Usage and Preferences

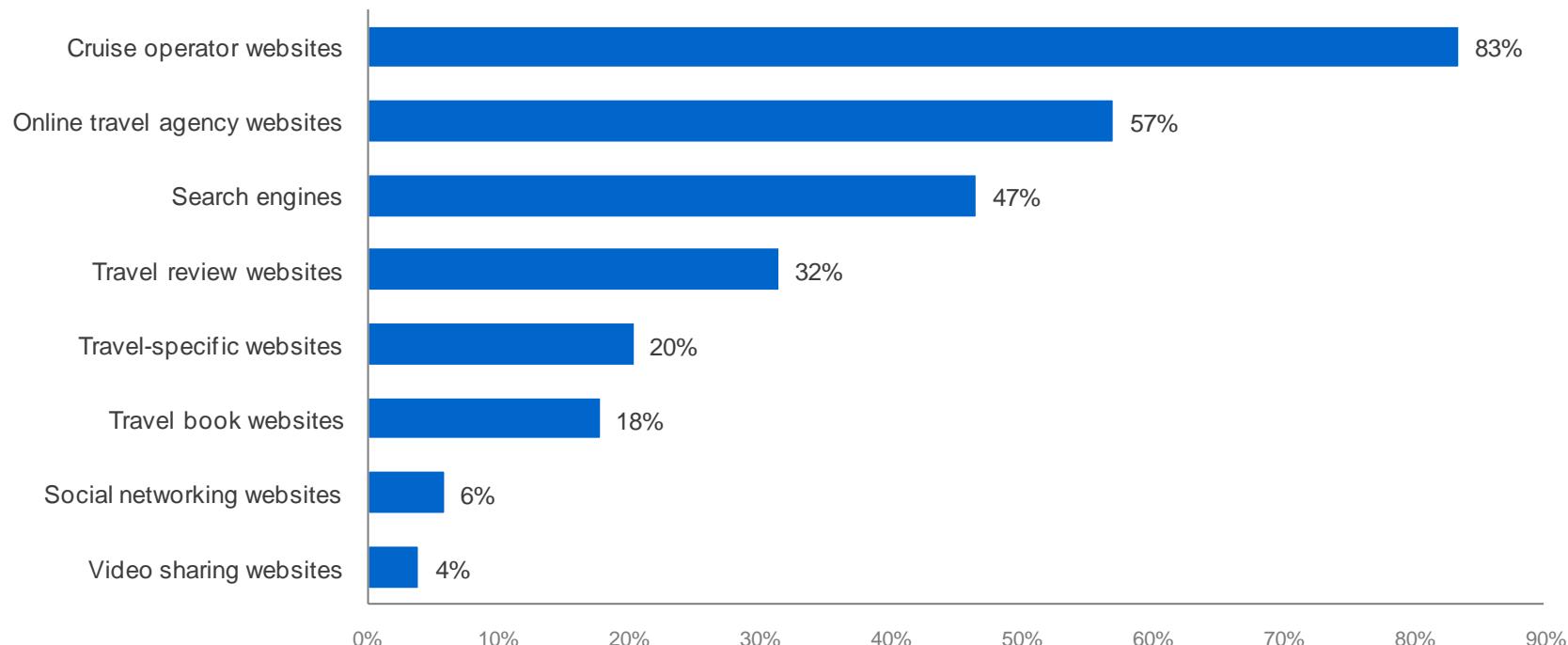
25% of Shoppers Research Exclusively Online

Offline Cruise Research Resources Used by Online Cruise Shoppers (Share of Online Cruise Shoppers, n=617)



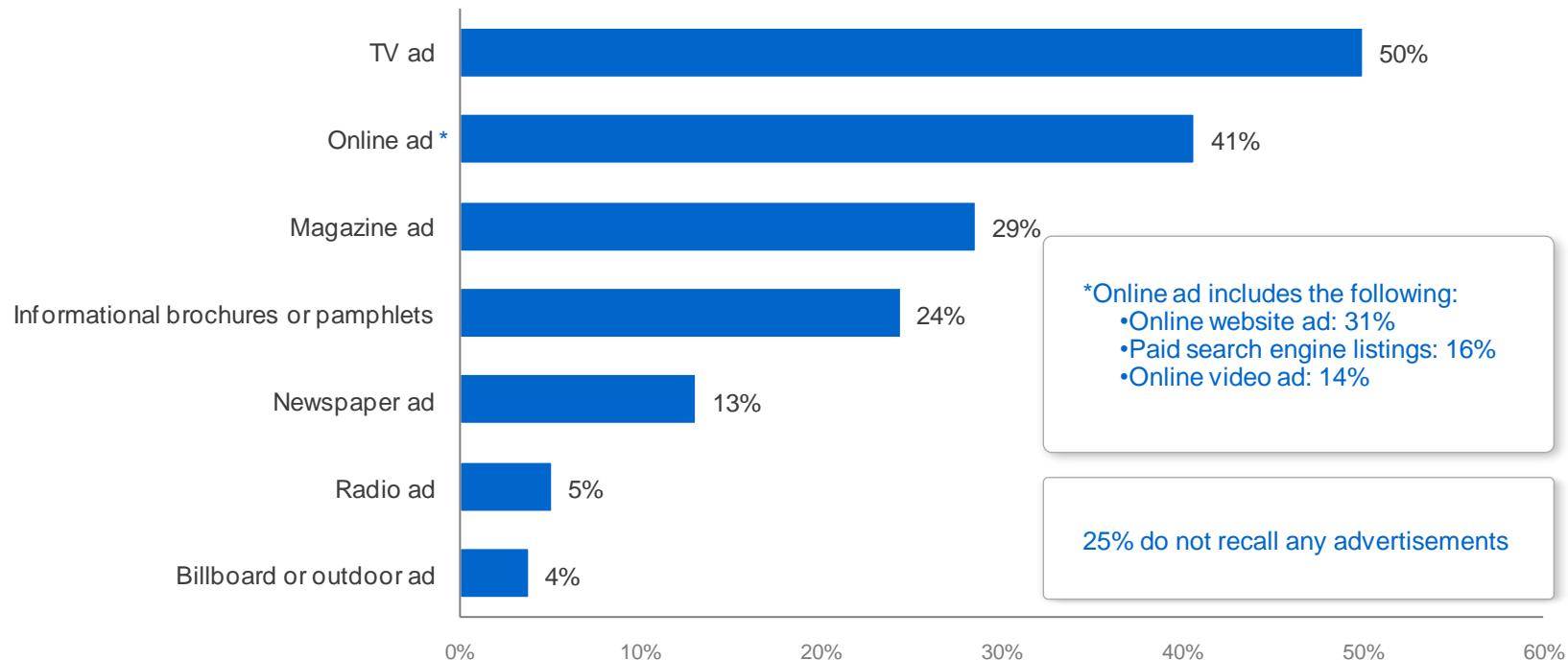
Half of Shoppers Report Search Engine Use

Online Cruise Research Resources Used by Online Cruise Shoppers
(Share of Online Cruise Shoppers, n=617)



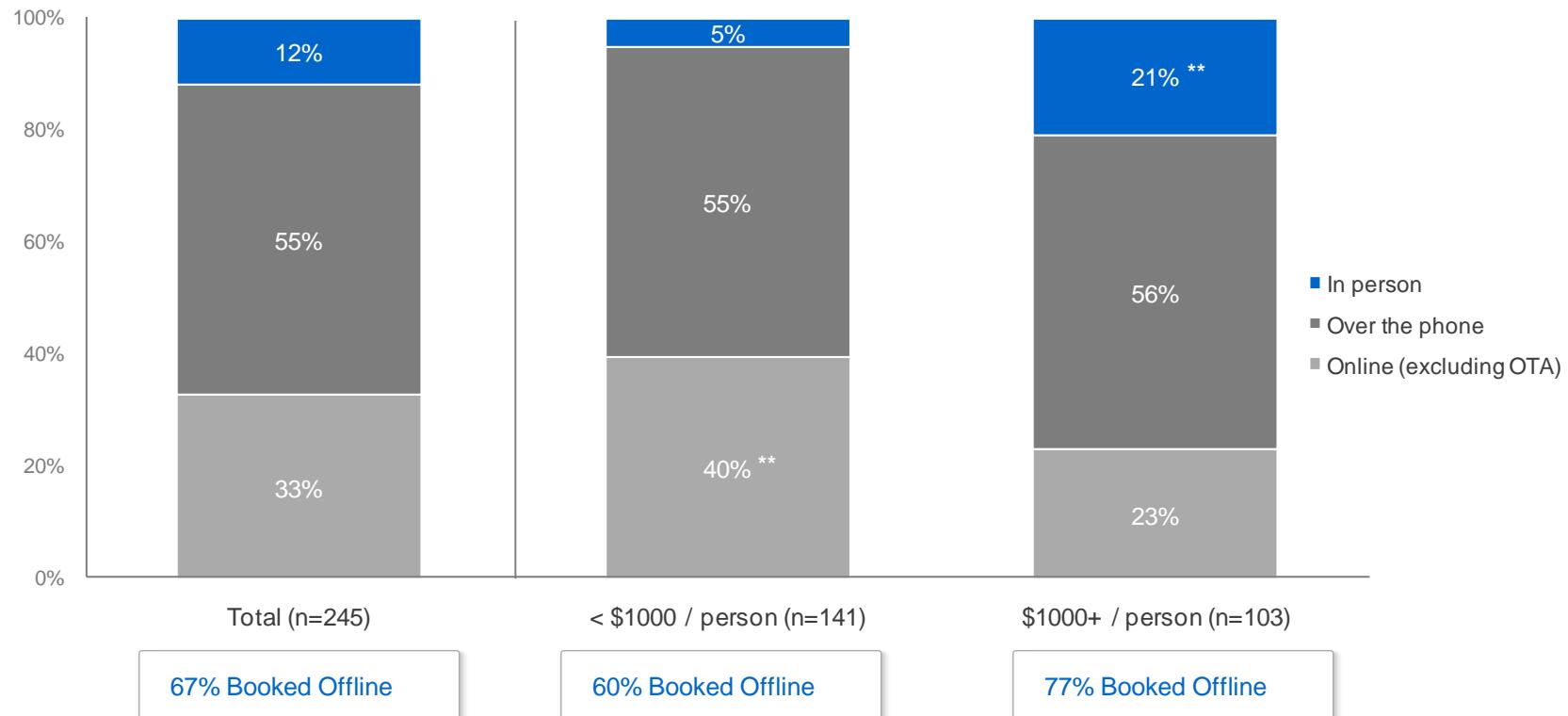
High Recall for Both TV and Online Ads

Advertising Recalled by Online Cruise Shoppers
(Share of Online Cruise Shoppers, n=617)



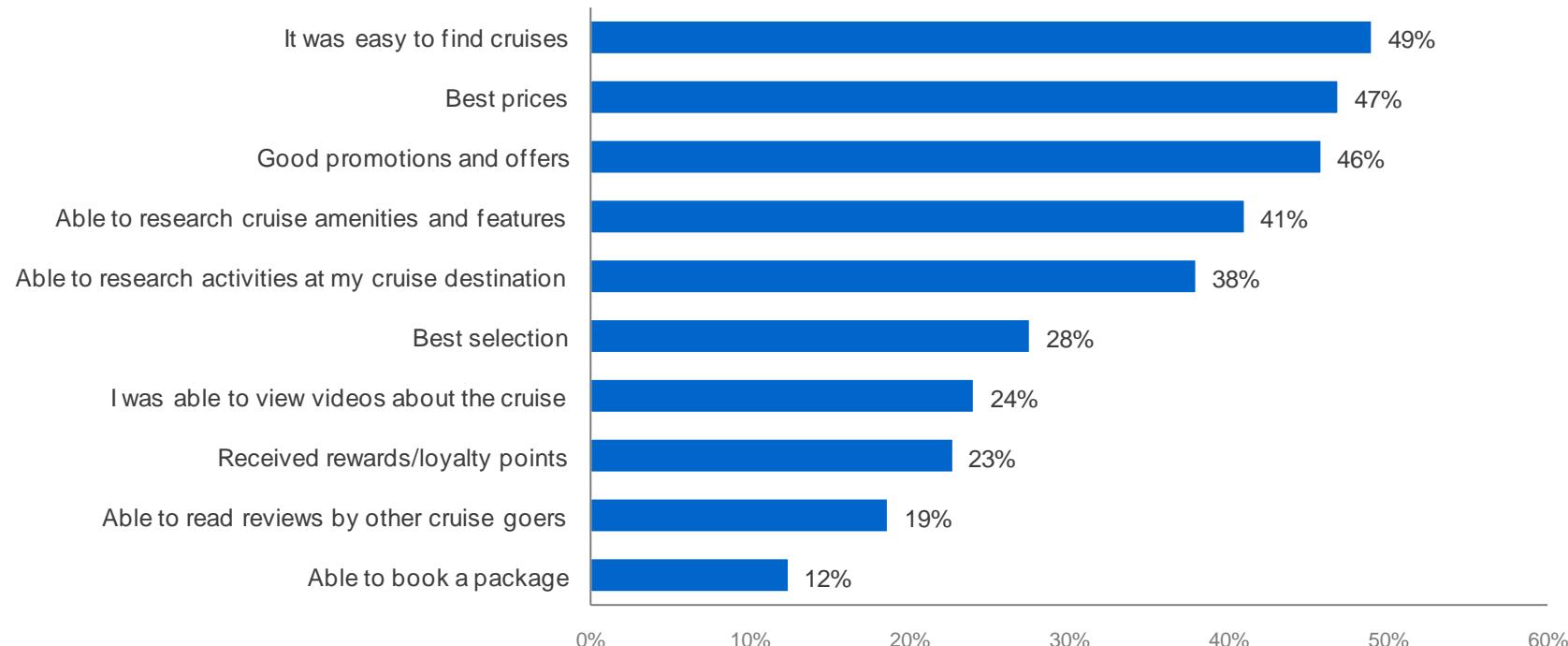
Two-Thirds of Shoppers Book Offline

Channel Used to Book Cruise by Cost of Cruise Per Person
(Share of Online Cruise Shoppers That Booked a Cruise, Excluding Online OTA Bookers, n=245)



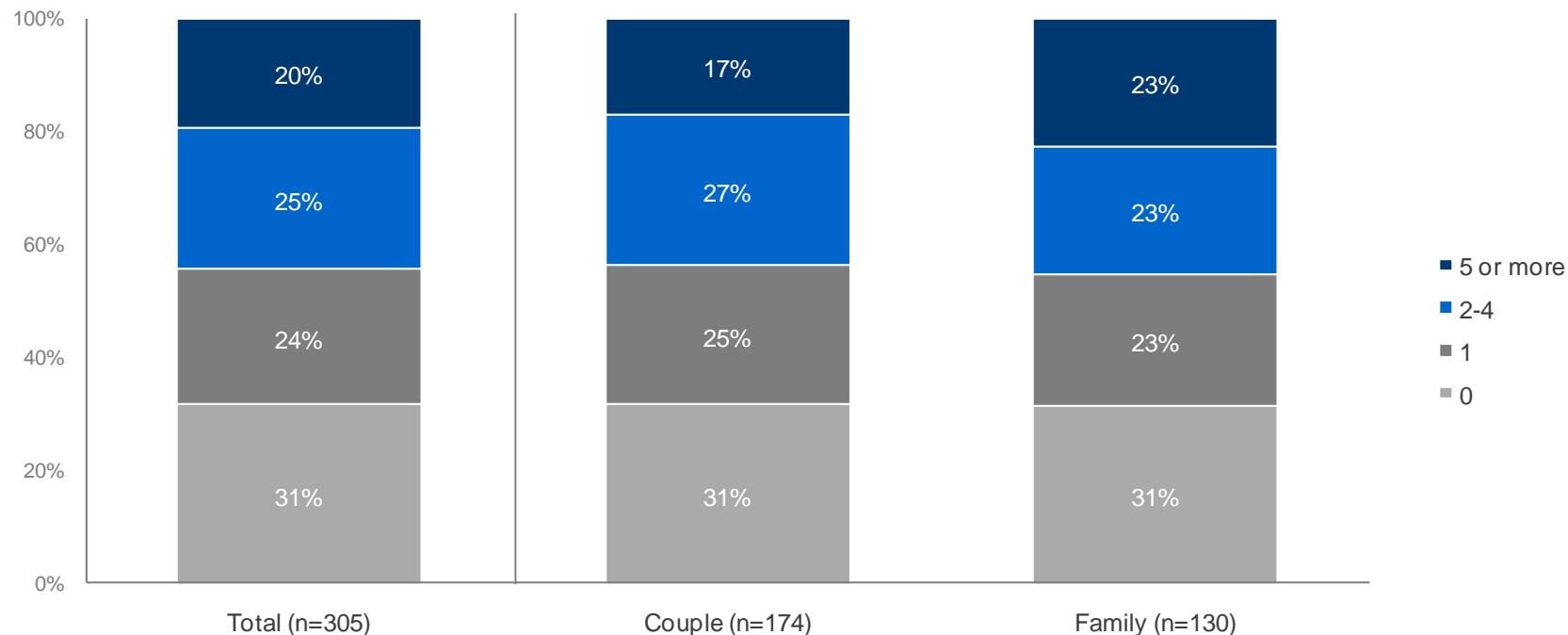
Finding Cruise Trumps Price in Online Booking

Why Online Cruise Bookers Booked With Specific Site (Share of Online Cruise Shoppers That Booked a Cruise Online in Q5, n=140)



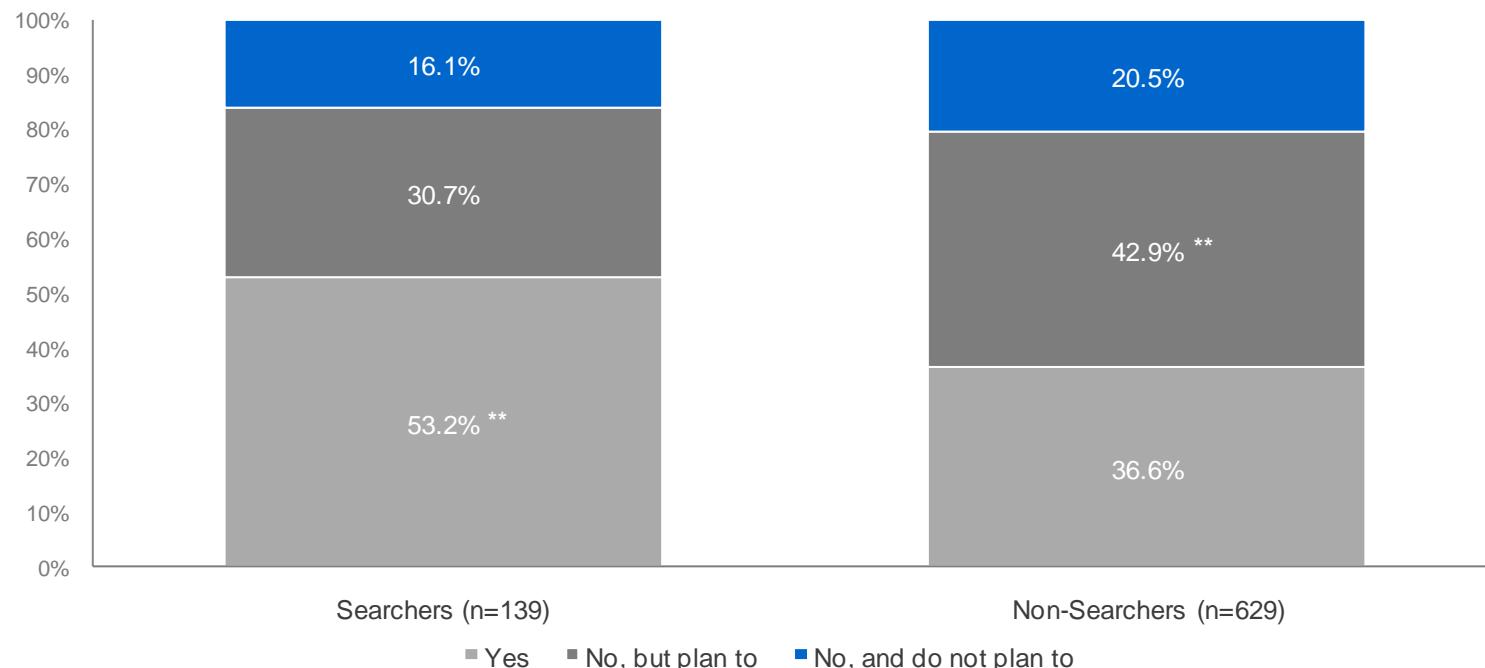
Most Bookers Cruising Again With Same Line

Number of Past Cruises with Cruise Line Booked
(Share of Online Cruise Shoppers That Booked a Cruise in Q4, n=305)



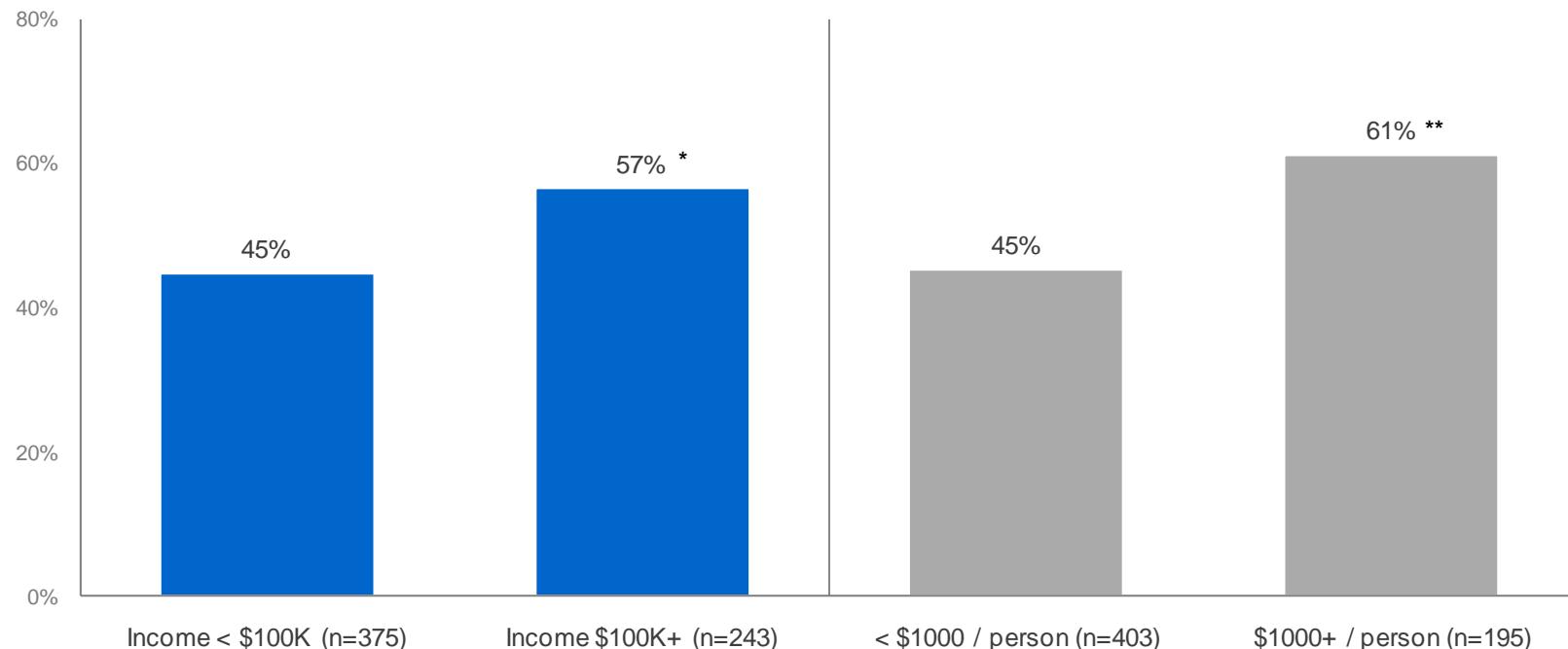
Shoppers Using Search More Likely to Book

Searchers & Non-Searchers Who Already Booked a Cruise
(Share of Total Respondents, n=768)



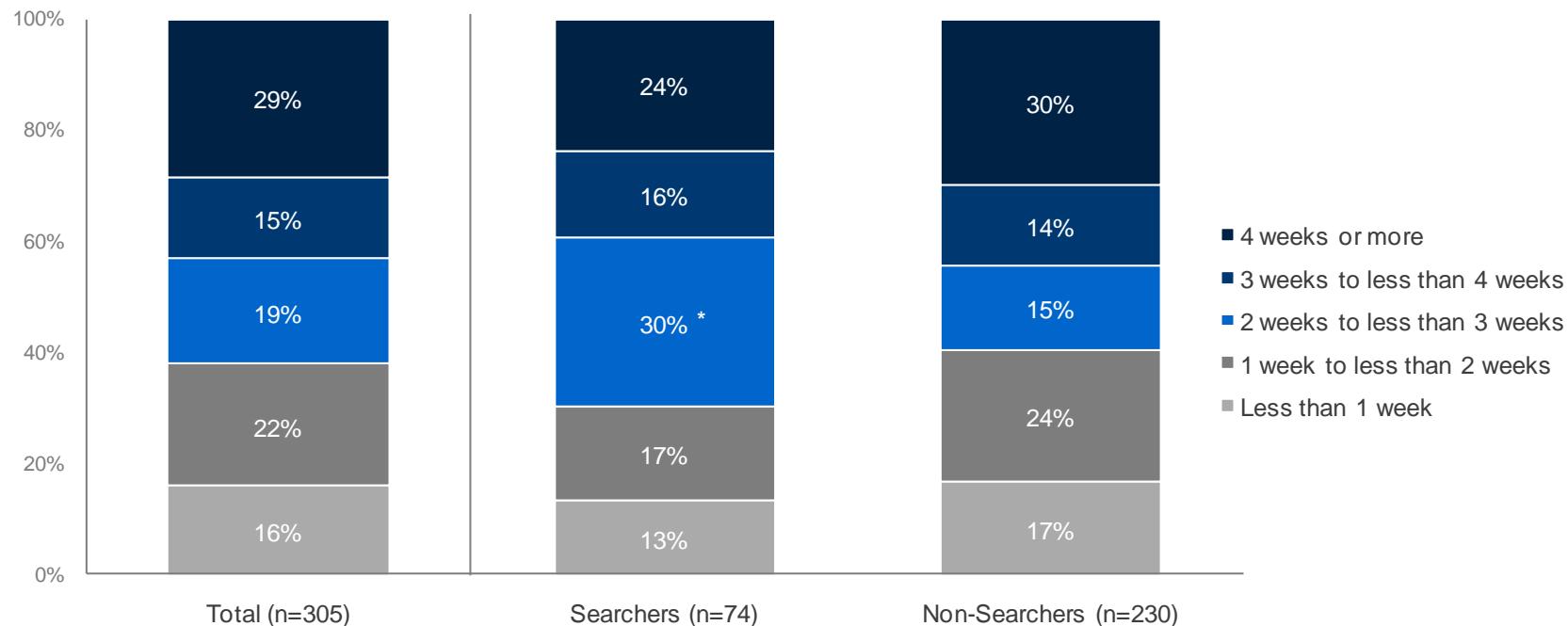
Propensity to Book Rises with Cost and Income

Percentage Who Already Booked a Cruise by Income and Cost per Cruise
(Share of Online Cruise Shoppers, n=617)



Nearly 1/3 Bookers Do 4+ Weeks of Research

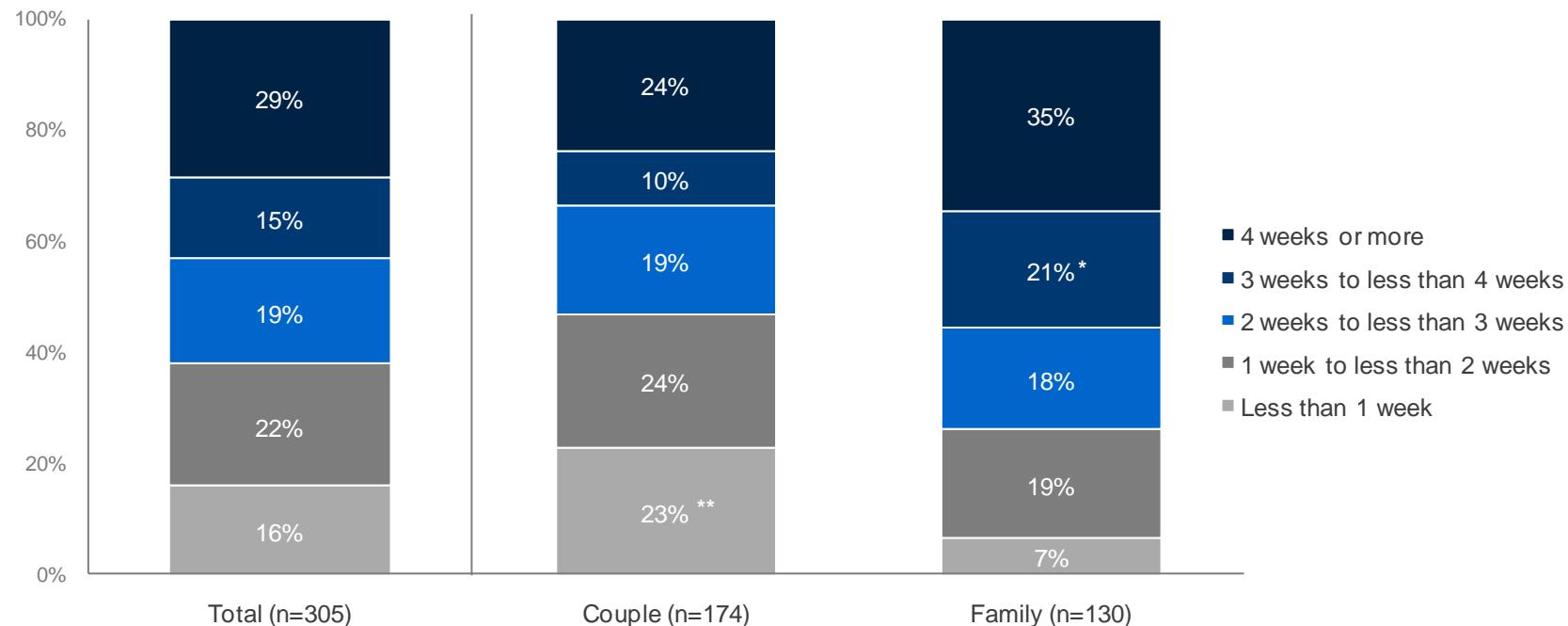
Time Spent Researching Cruise Before Booking
(Share of Online Cruise Shoppers That Booked a Cruise in Q4, n=305)



Families Spend More Time Researching

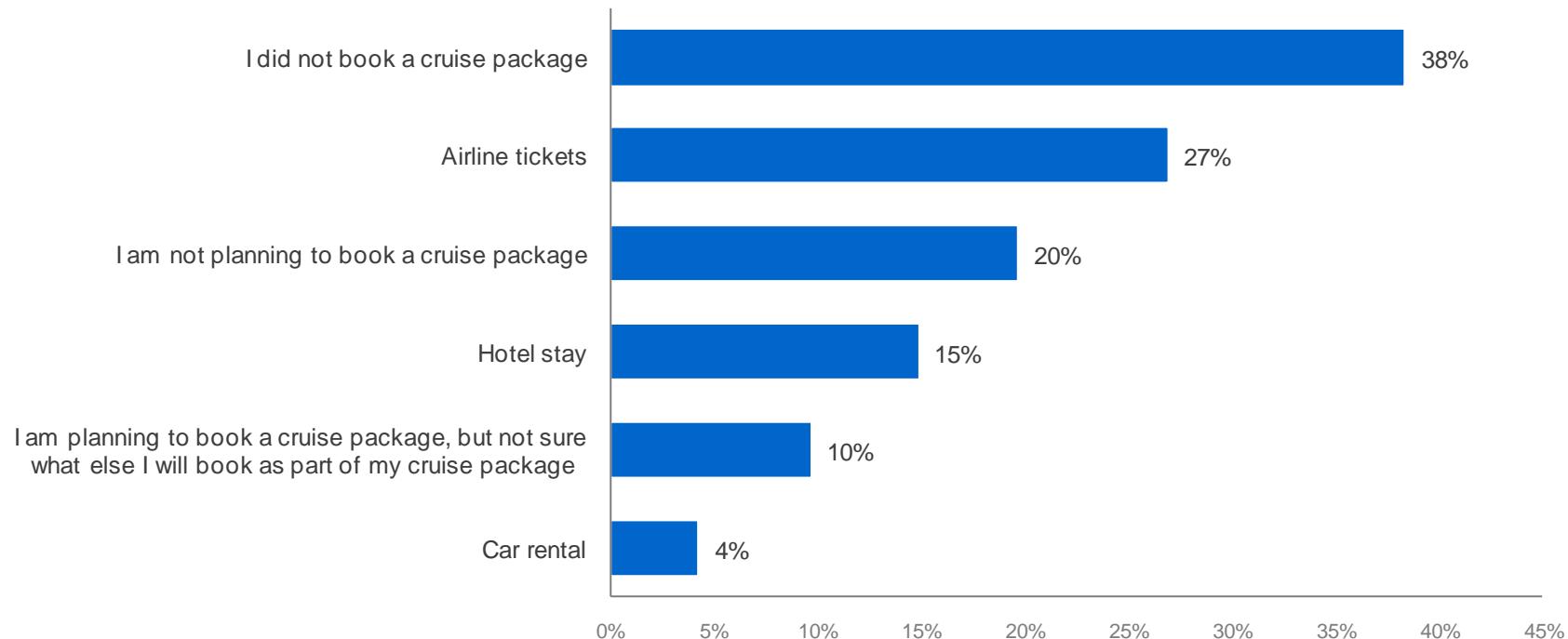
Time Spent Researching Cruise Before Booking

(Share of Online Cruise Shoppers That Booked a Cruise in Q4, n=305)



Almost 4 in 10 Cruisers Do Not Book Cruise Packages

Cruise Cross-Bookings in Anticipation of Travel
(Share of Online Cruise Shoppers, n=617)



Summary of Takeaways

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