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The Role of Video in the Travel Shopping Process

Google Compete
U.S., September 2010

Background and Objectives

Background

- The objective of this study is to quantify usage of video and the difference in booking rates among video users and shoppers who don't use video. Understanding the role of video in travel shopping and booking allows for an assessment of how to best position properties like YouTube.

Objectives

- Determine if video consumption leads to shorter research-to-booking times
- Determine if shoppers who view videos are more apt to use search engines in their research
- Analyze differences in the number of sites visited between shoppers who searched for videos and shoppers who did not search for videos

Methodology

Recruitment

- Look at the past 6 months of clickstream for online travel bookers that converted between December 2009 through May 2010
 - Also includes clickstream from October and November 2009 for December bookers (60-days prior to booking)
- Identify video usage by looking for YouTube query strings that include travel terms
 - Keyword term list provided by Google
- Define 4 segments of travel shoppers:
 - Shoppers who searched for travel video on YouTube
 - Shoppers who did not search for travel video on YouTube
 - Bookers who searched for travel video on YouTube
 - Bookers who did not search for travel video on YouTube
- Compare travel bookers to look for differences in behaviors in the 60 days prior to a booking

Key Takeaways

- On average, travel bookers searching on YouTube were repeat visitors
 - These bookers averaged just over two sessions
- Travel bookers who searched for video content on YouTube had a higher frequency of search referrals to travel sites
 - Implies that video consumers may be more apt to use search during their research
- Video searchers spent an average of 41 minutes consuming YouTube content after performing a travel search on the site
- Marketers have more time to influence video searchers
 - The research-to-booking window of video searchers was approximately 3 days longer than non-video searchers
- Video bookers visited and consumed at least 4x more travel content in every category of travel site
 - Planning & review sites lead the pack with nearly 9x more visits from video searchers vs. non-video searchers

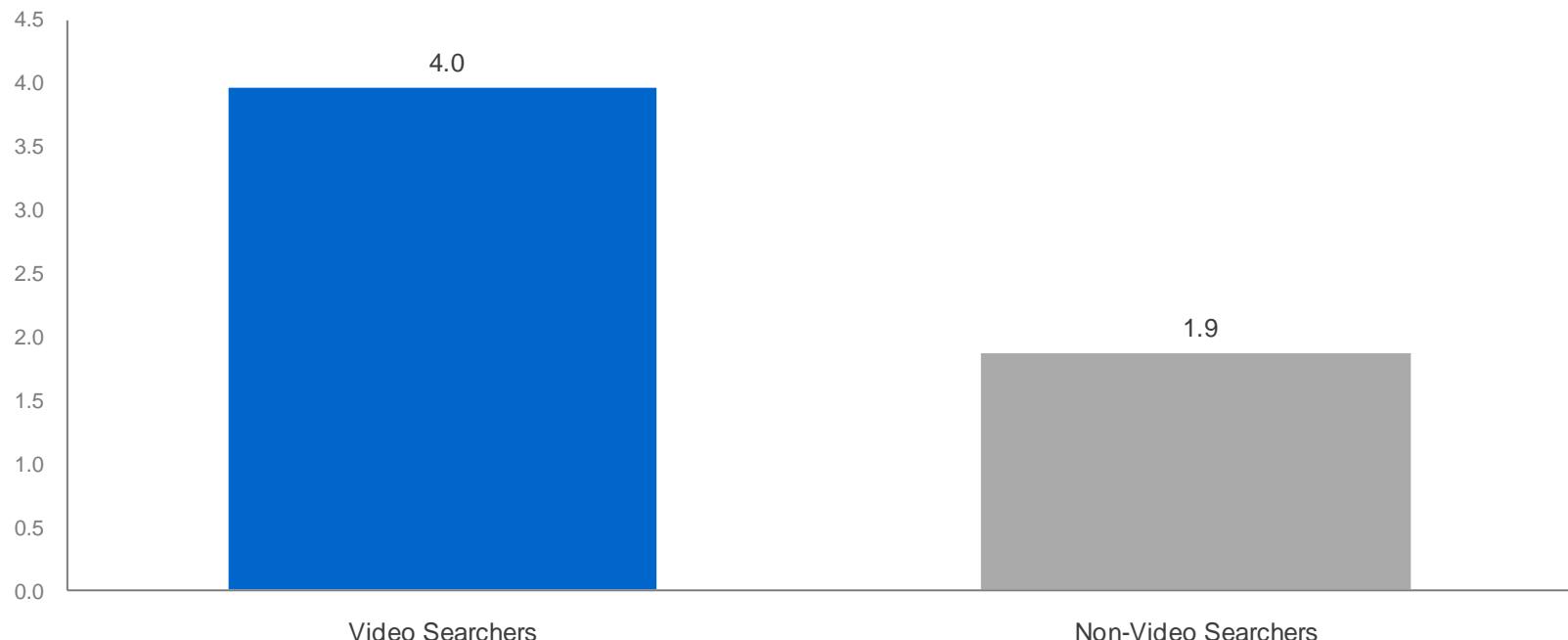


Video Market Overview

Video Use Increased Travel Search Referrals

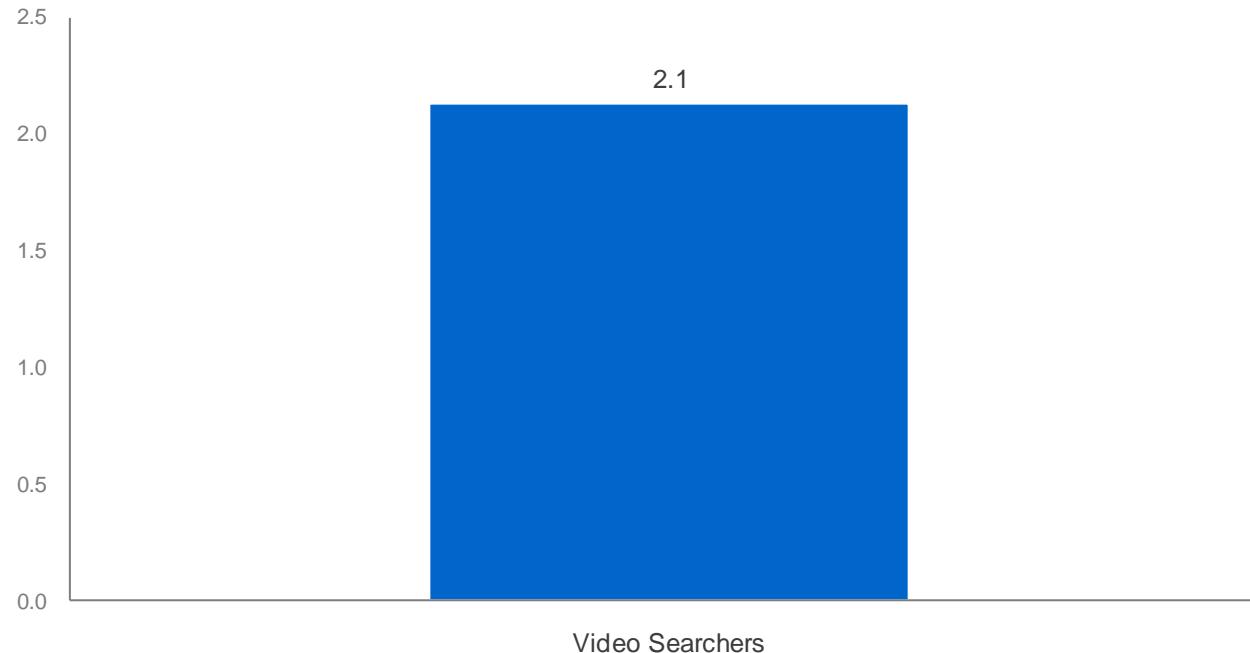
Search Referral Frequency

(Average Number of Search Referrals to Travel Sites Among Video and Non-Video Searchers, Dec. '09-May '10)



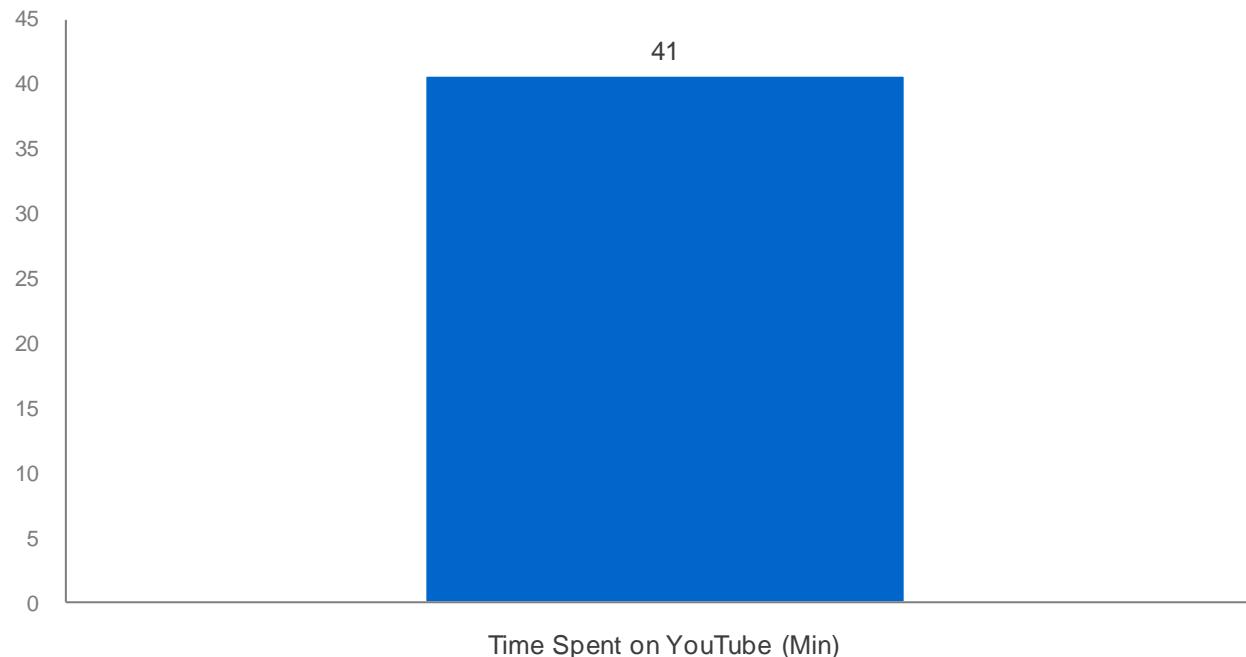
Video Searchers: Two YouTube Travel Sessions

Number of Travel Sessions with a Video Search on YouTube
(Number of Sessions Among Video Bookers on YouTube, Dec. '09-May '10)



Bookers Spent Over 40 Minutes on YouTube

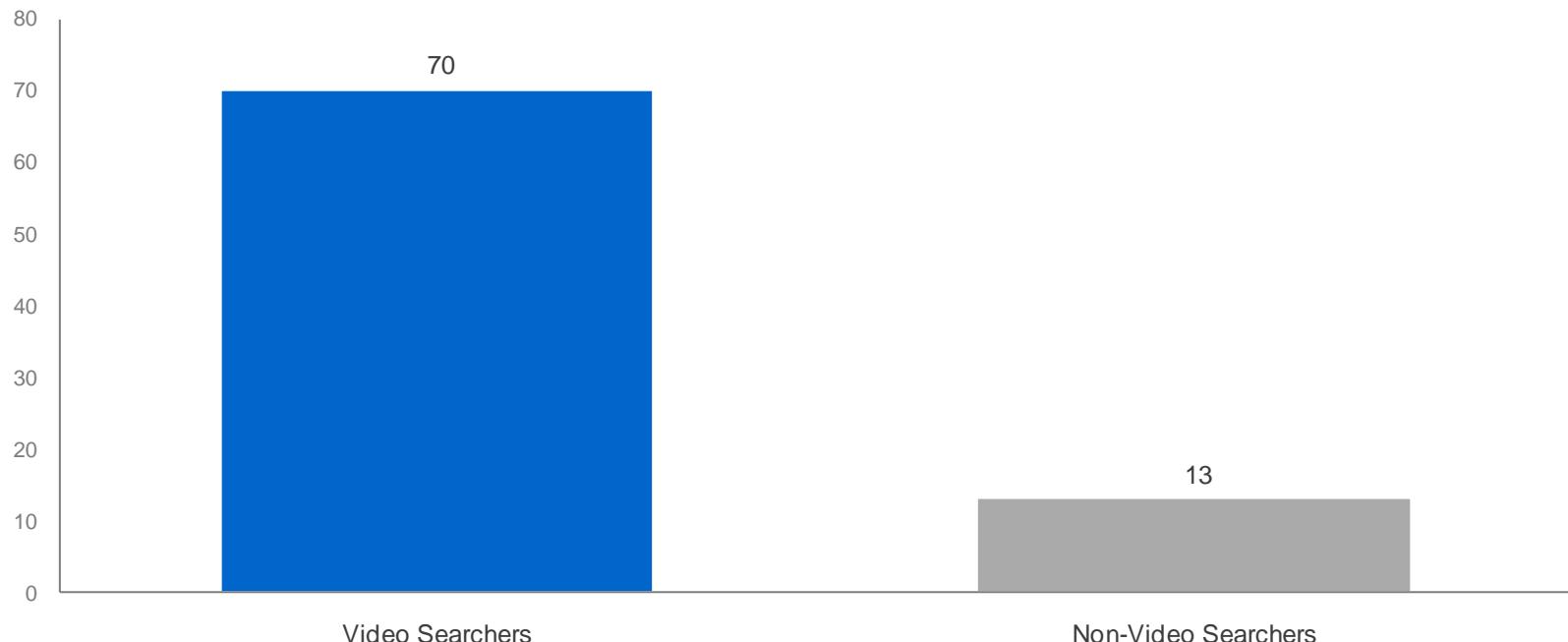
Time Spent on YouTube
(Total Time Spent on YouTube Among Travel Bookers Searching for Video, Dec. '09-May '10)



Video Searchers Used More Travel Content

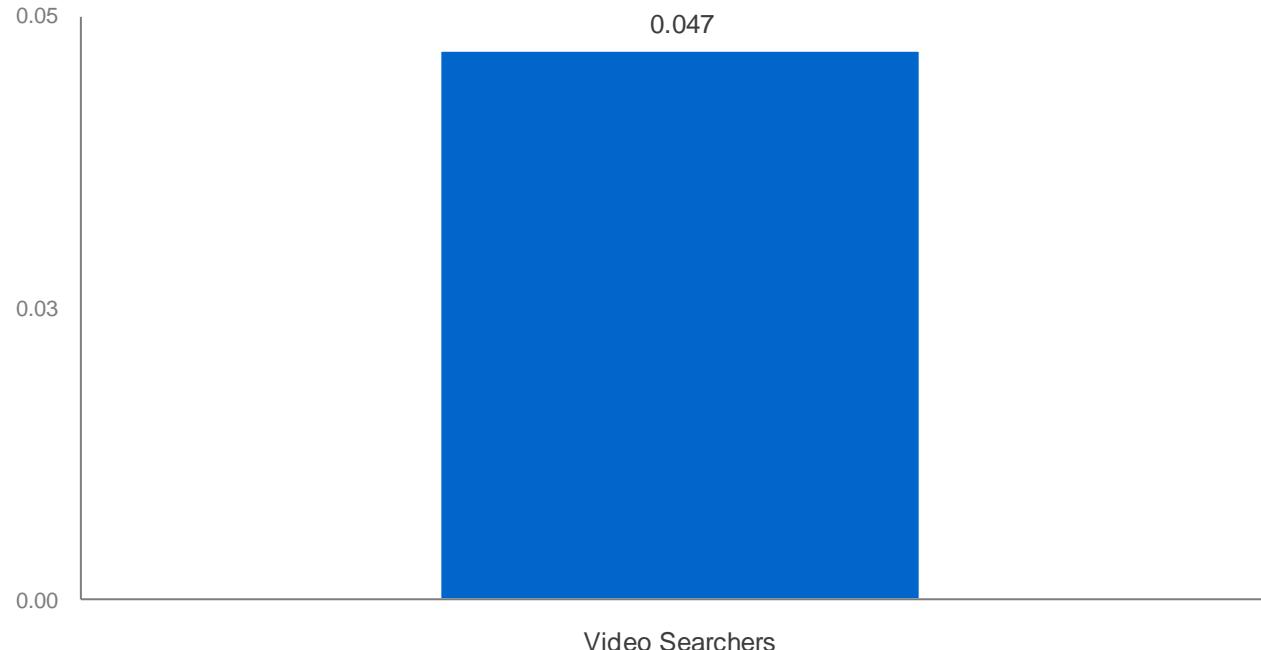
Travel Site Visits

(Average Number of Visits to Travel Sites Among Video and Non-Video Bookers, Dec. '09-May '10)



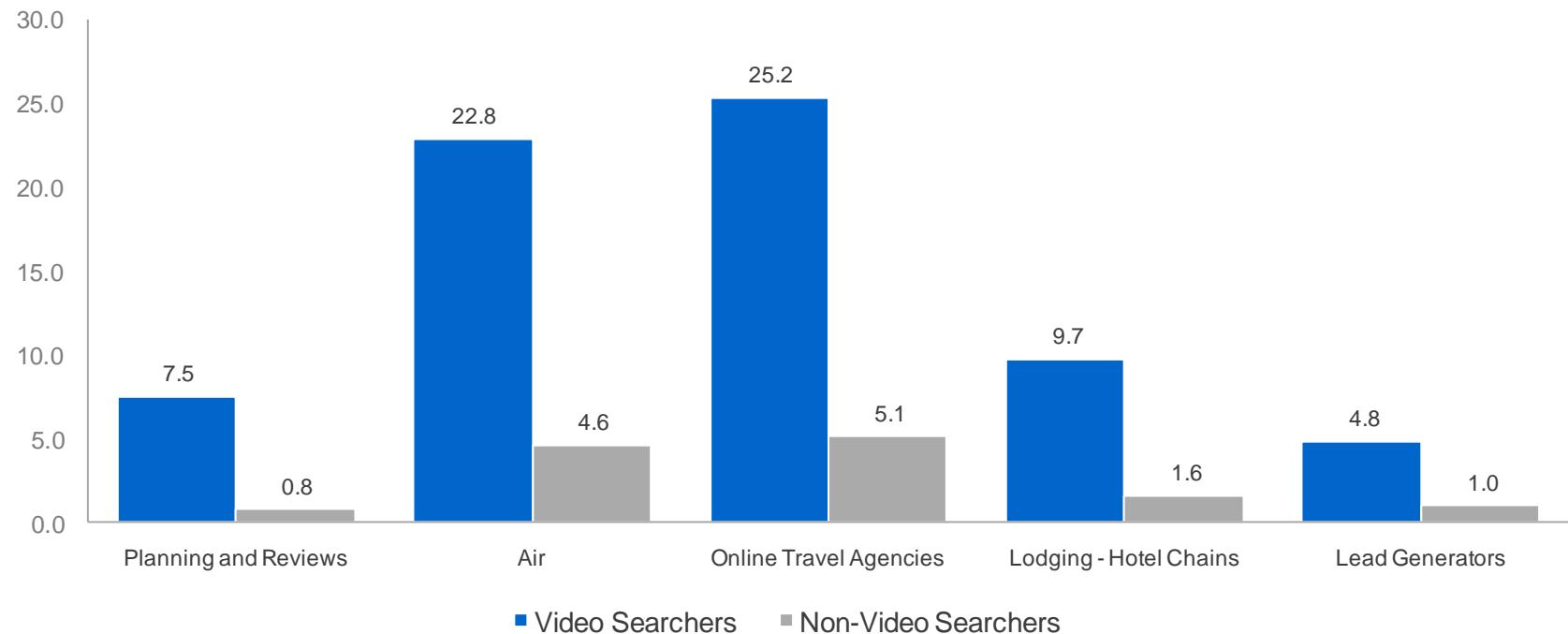
Bookers Used YouTube Travel Channel Little

Average Number of Sessions on the YouTube Travel Channel
(Average Number of Sessions Among Video Bookers on the YouTube Travel Channel, Dec. '09-May '10)

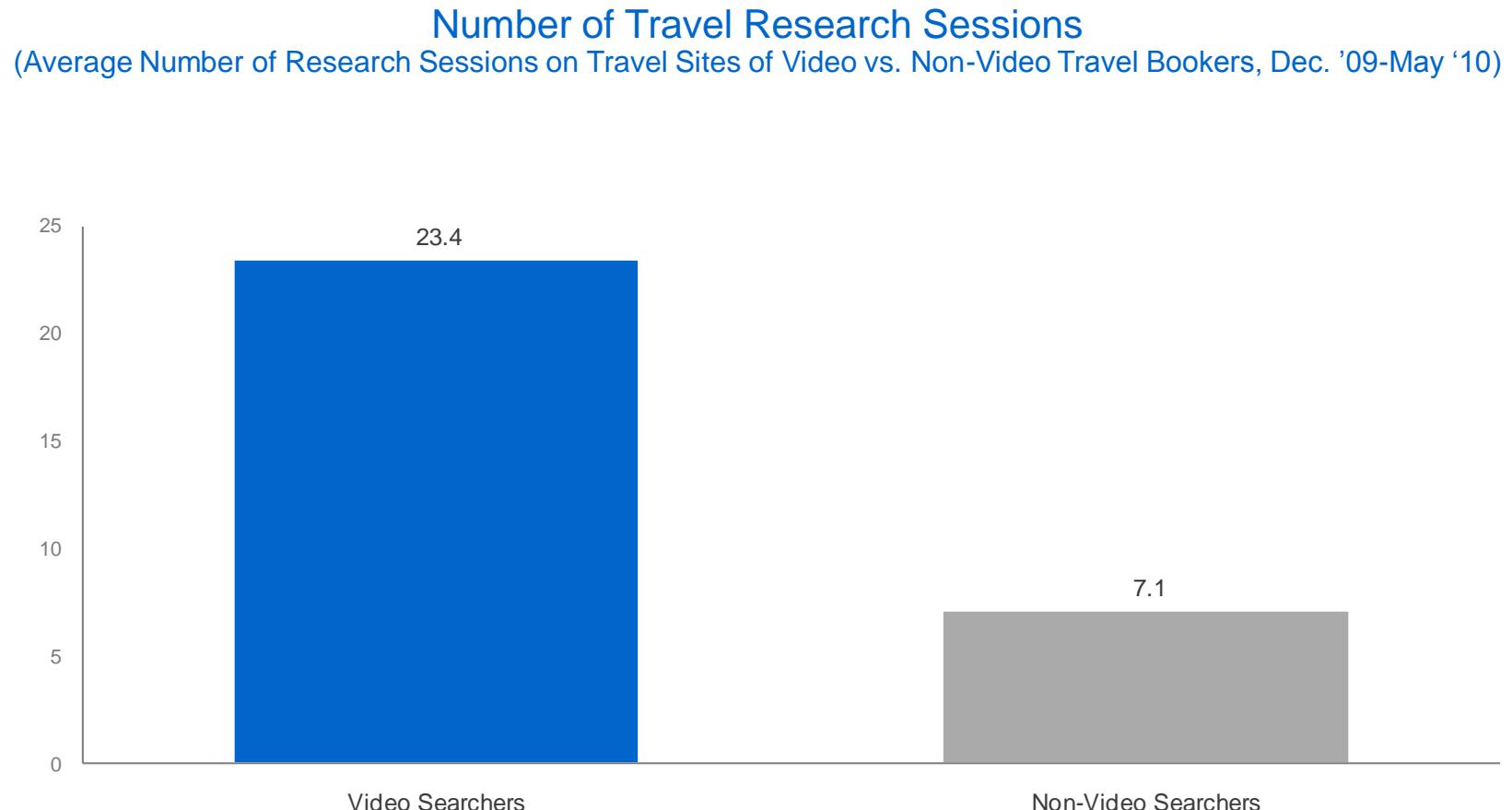


Video Searchers Visited 4X More Travel Sites

Types of Travel Sites Visited
(Avg. Number of Visits Among Travel Bookers to Each Category, Dec. '09-May '10)

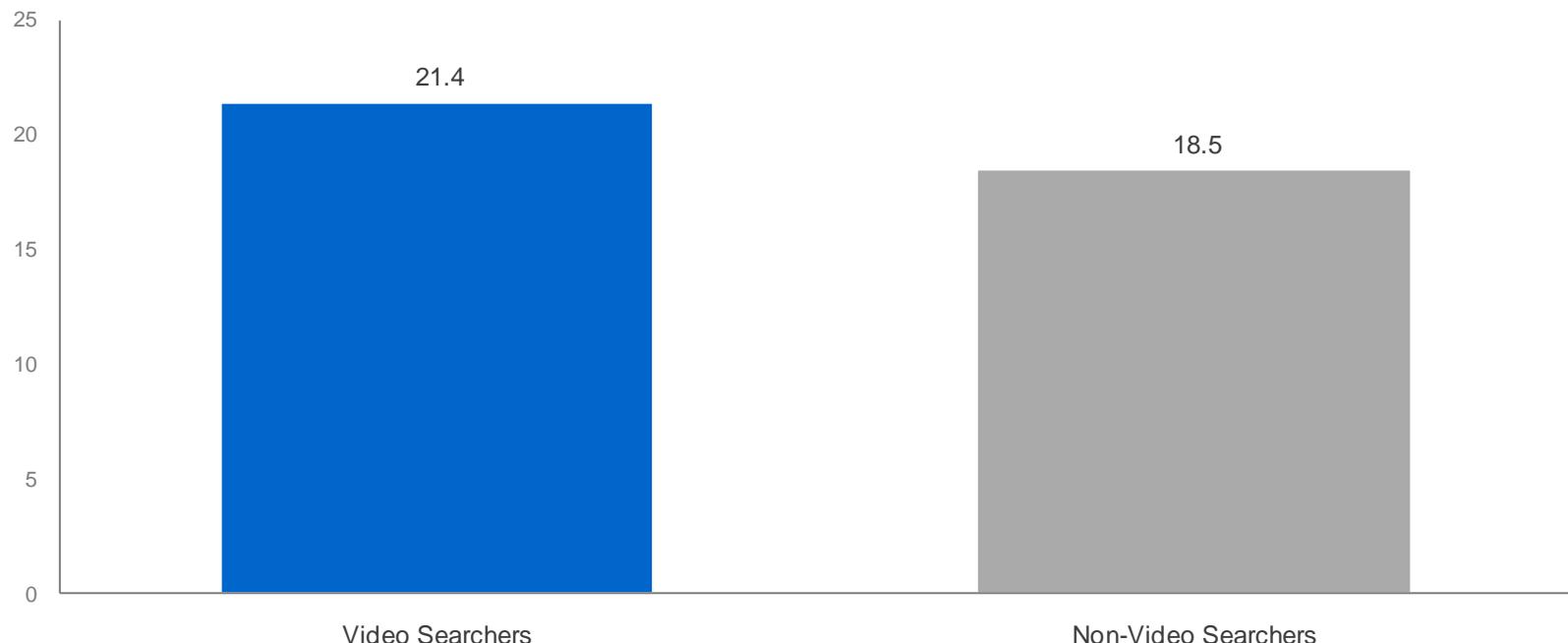


Video Searchers Researched 3X More Content



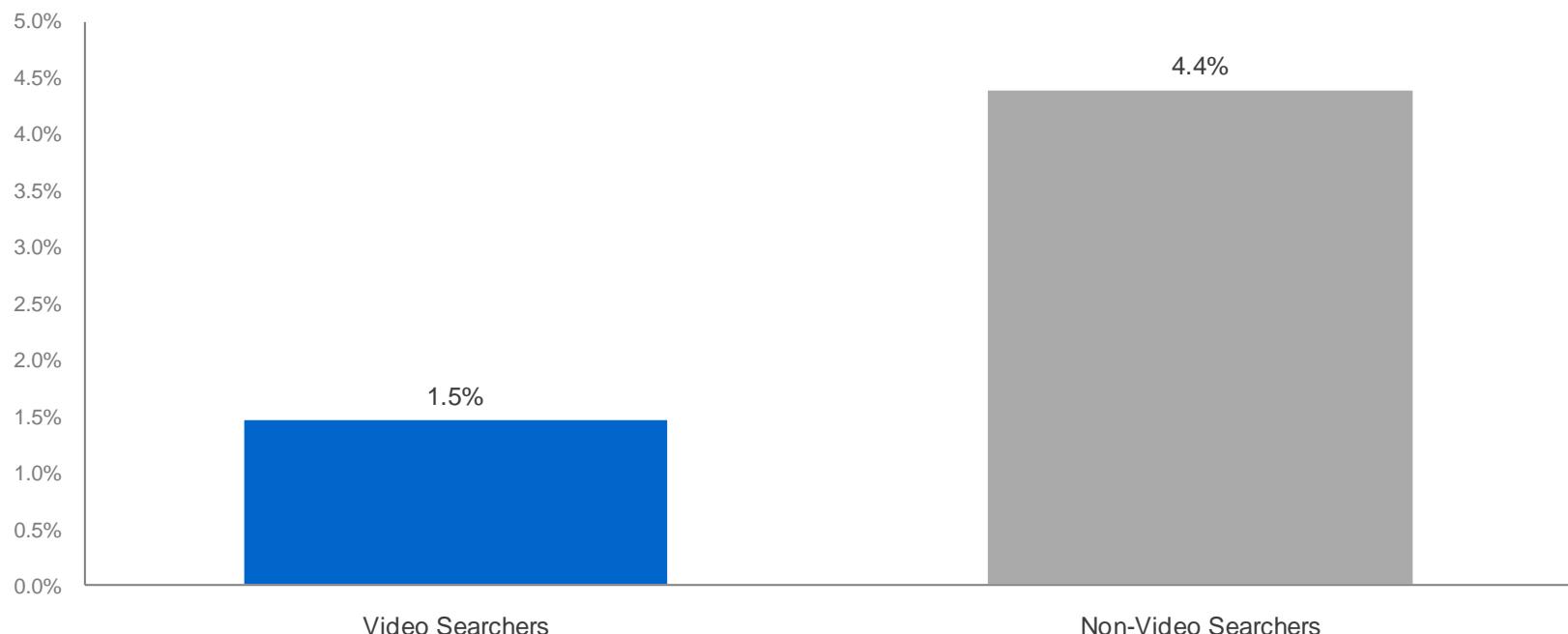
More Time to Influence Video Searchers

Research-to-Booking Windows
(Research-to-Booking Times (Days) for Video vs. Non-Video Searchers, Dec. '09-May '10)



Booking Rate Lower for Video Searchers

Booking Rate
(Share of Video Searchers vs. Non-Video Searchers that Booked Travel, Dec. '09-May '10)



Conclusions

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