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# The Traveler's Road to Decision 2011

Google/IPSOS OTX Media CT
US, July 2011

# Objectives

To understand how consumers research and gather information throughout the travel decision-making process.

How has travel **planning** changed this year?

What role does the **Internet** play in travel planning?

Does the **research process** vary by traveler type?

How is **online video** used in the travel planning process?

How do **mobile devices** play a role in the process?

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Source: Google/OTX, Traveler's Road to Decision 2011, U.S., Jul 2011
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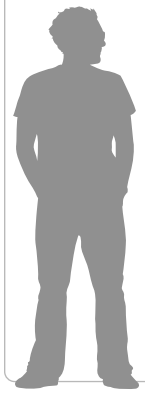
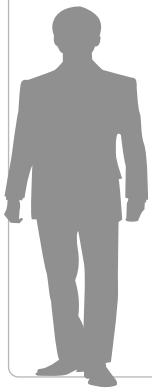
# Research Methodology

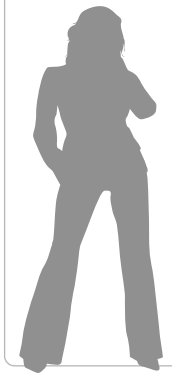
- 5,000 US consumers identified as **Personal** or **Business Travelers** (see definitions below) completed a survey about travel habits and attitudes.
  - A segment of 1,500 **Affluent Travelers** (based on self-reported HHI) was also interviewed about their leisure travel behavior/intentions
- If qualified, respondents were routed to a maximum of two of the following deep-dive sections: **air travel, hotel, car rental, cruise.**
- Interviews were conducted between 4/20/11 and 5/11/11.
  - The current report reflects the third annual wave of this research (Waves 1 and 2 completed in spring 2009 and spring 2010) and provides trended insights.



**Personal Traveler**
has taken at least one trip for leisure in the past 6 months
(3500 interviews)



**Business Traveler**
has taken at least three trips for business in the past 6 months
(1500 interviews)



**Affluent Traveler**
has taken at least one trip for leisure in the past 6 months and has a household income of $250K+
(1500 interviews)

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Source: Google/OTX, Traveler's Road to Decision 2011, U.S., Jul 2011
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# Key Findings

1. The **positive outlook for travel continues in 2011**, as the majority of travelers planning to take the 'same or more' trips has grown over the past two years.

2. The **internet continues to be the most prevalent tool** for researching and booking travel.

3. Primarily for reasons related to ease and cost, **search engines are the most commonly used online source for Personal Travelers**.

4. **Reliance on mobile devices** for travel activity continues to grow considerably.

5. **Online videos** are increasingly popular for travel-related activity.

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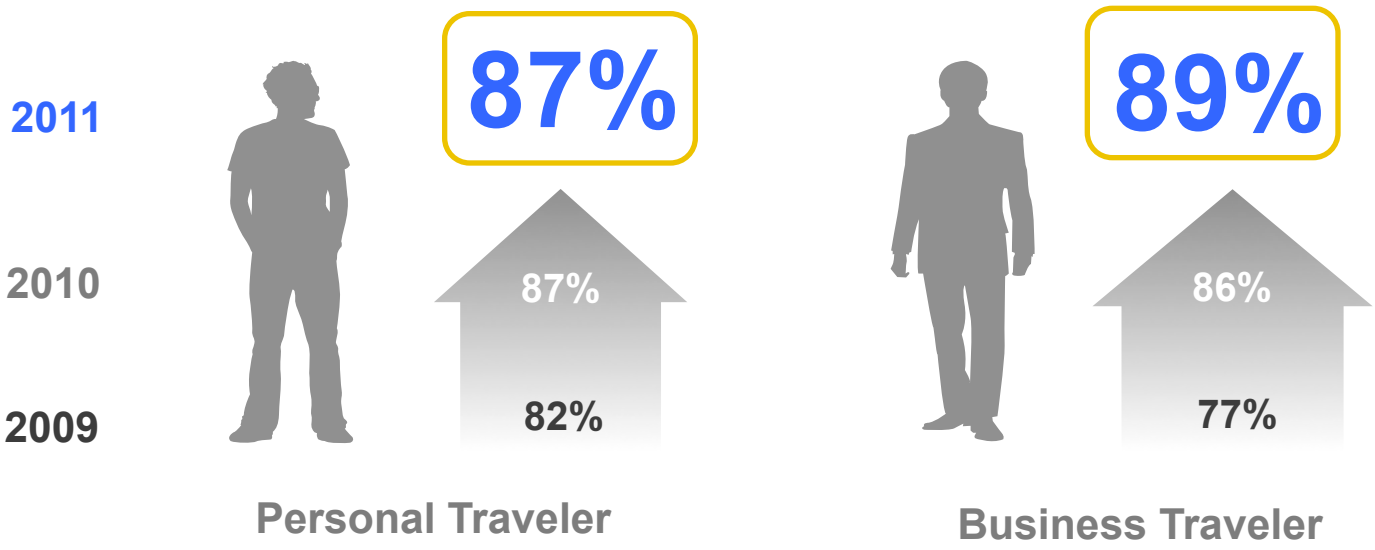
Source: Google/OTX, Traveler's Road to Decision 2011, U.S., Jul 2011
www.thinkwithgoogle.com/insights

# Travel Outlook

# The Overall Travel Outlook Continues to be Positive

## Predicted 2011 Travel Frequency

Plan to take the Same or More Personal/Business Trips in 2011 (vs. 2010 and 2009)




Base: Personal Traveler 2011 (Total Respondents); Business Traveler (Total Respondents)
Q: Thinking about any [INSERT: personal/leisure OR business] trips you may take in 2011, would you say the number of trips you'll take will be…
Source: Google/OTX, Traveler's Road to Decision 2011, U.S., Jul 2011
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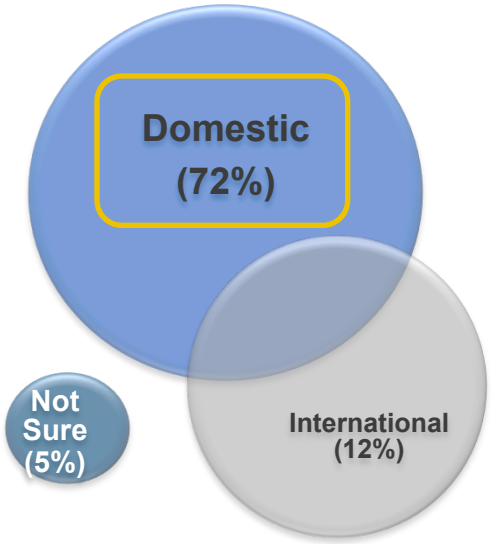
# Personal Travelers Plan Domestic for their Next Vacation

**% of Leisure Travelers Considering International vs. Domestic for Their Next Vacation**




**Top 5 Domestic Destinations**

1. **Las Vegas (27%)**
2. New York City (18%)
3. Orlando (18%)
4. Honolulu (14%)
5. Chicago (13%)

**Top 5 International Destinations**

1. **Caribbean (23%)**
2. Italy (21%)
3. United Kingdom (19%)
4. Mexico (19%)
5. Bahamas (18%)

Base: Personal Traveler 2011 (3097)
Q: Are you considering domestic or international destinations for your next vacation? Which of the following domestic/international destinations, if any, would you consider for your next vacation? (Select all that apply)
Source: Google/OTX, Traveler's Road to Decision 2011, U.S., Jul 2011
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# Personal Travelers Remain Value Conscious

**% of travelers who agree or strongly agree with the following statements…**



**59%** I plan to spend more time shopping around/researching before booking travel because finding value for my money is important to me. vs. 54% in 2010

**57%** I will take advantage of travel coupons and discounts more over the next year.

**55%** I would like to stay at an upscale or luxury hotel if the price is right.

**53%** I plan to spend more time comparison shopping online over the next year than I have in the past.

**39%** I plan to take a "wait and see" approach to booking travel (rather than booking in advance) in order to secure good deals.

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Base: Personal Traveler 2011 (Total Respondents)
Q: Using the scale below, please indicate how much you agree or disagree with each of the following statements about traveling for personal/leisure purposes in the next year.
Source: Google/OTX, Traveler's Road to Decision 2011, U.S., Jul 2011
www.thinkwithgoogle.com/insights

# Business Travelers Search for Value Too



**% of travelers who agree or strongly agree with the following statements…**

| | |
|---|---|
| **69%** | I would like to stay at an upscale or luxury hotel if the price is right. |
| **56%** | I plan to spend more time shopping around/researching before booking business travel, in order to find good value for my money. |
| **55%** | I plan to look for lower cost alternatives when booking my overnight accommodations. |
| **47%** | I'm more likely to look for flights with connections or layovers in order to save money. |

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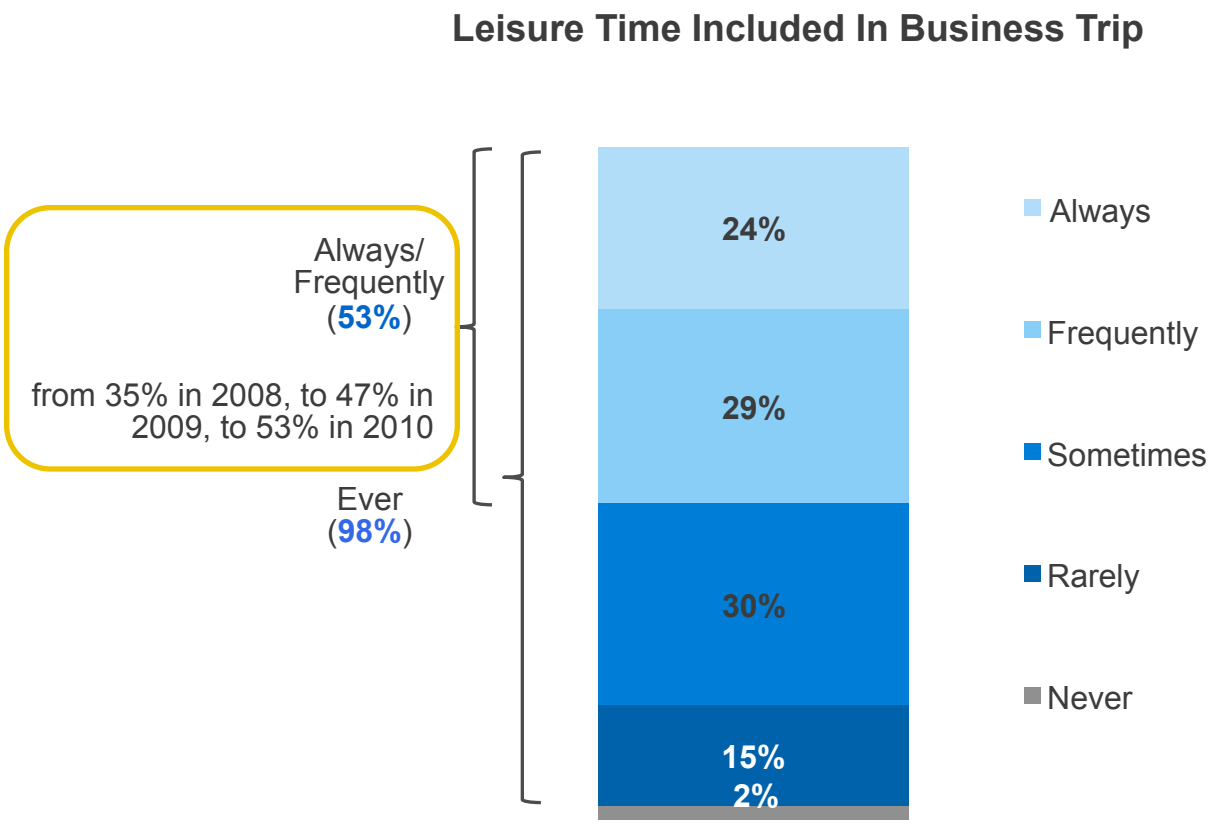
Base: Business Traveler 2011 (1500)
Q: Using the scale below, please indicate how much you agree or disagree with each of the following statements about traveling for business purposes in the next year.

Source: Google/OTX, Traveler's Road to Decision 2011, U.S., Jul 2011
www.thinkwithgoogle.com/insights

# ½ of Business Travelers Frequently Include Leisure Time/Entertainment on their Trips




Base: Business Traveler 2011 vs 2010 (1500; 1182)
Q: Using the scale below, please indicate how much you agree or disagree with each of the following statements about traveling for business purposes in the next year. Right hand side: Using the scale below, please indicate how much you agree or disagree with each of the following statements about traveling for business purposes in the next year.

Source: Google/OTX, Traveler's Road to Decision 2011, U.S., Jul 2011
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# Rewards Program Membership is Higher for Business Travelers and in Air Travel

**Reward Program Membership**

**64%**
of Personal Travelers are members of a travel rewards program

| | | |
|---|---|---|
| 45% | | 70% |
| 41% | | 70% |
| 18% | | 50% |

**89%**
of Business Travelers are members of a travel rewards program

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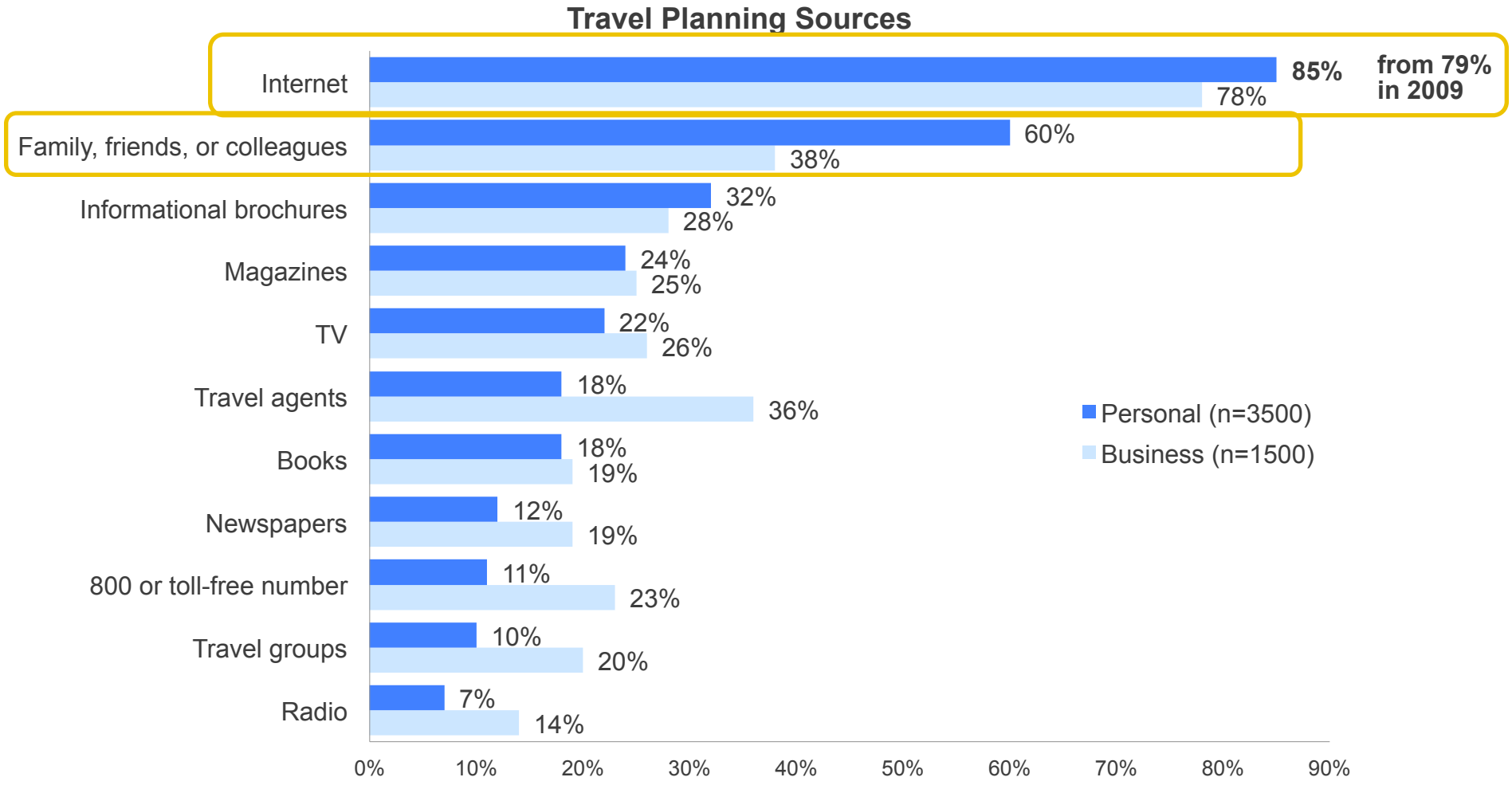
Base: Personal Traveler (2010: 3500; 2009: 3450); Business Traveler (2010: 1500; 2009:1552).
Q: Which, if any, of the following types of rewards programs do you belong to?
Source: Google/OTX, Traveler's Road to Decision 2011, U.S., Jul 2011
www.thinkwithgoogle.com/insights

# Internet Usage

# The Internet is the Leading Source for Travel Planning Information

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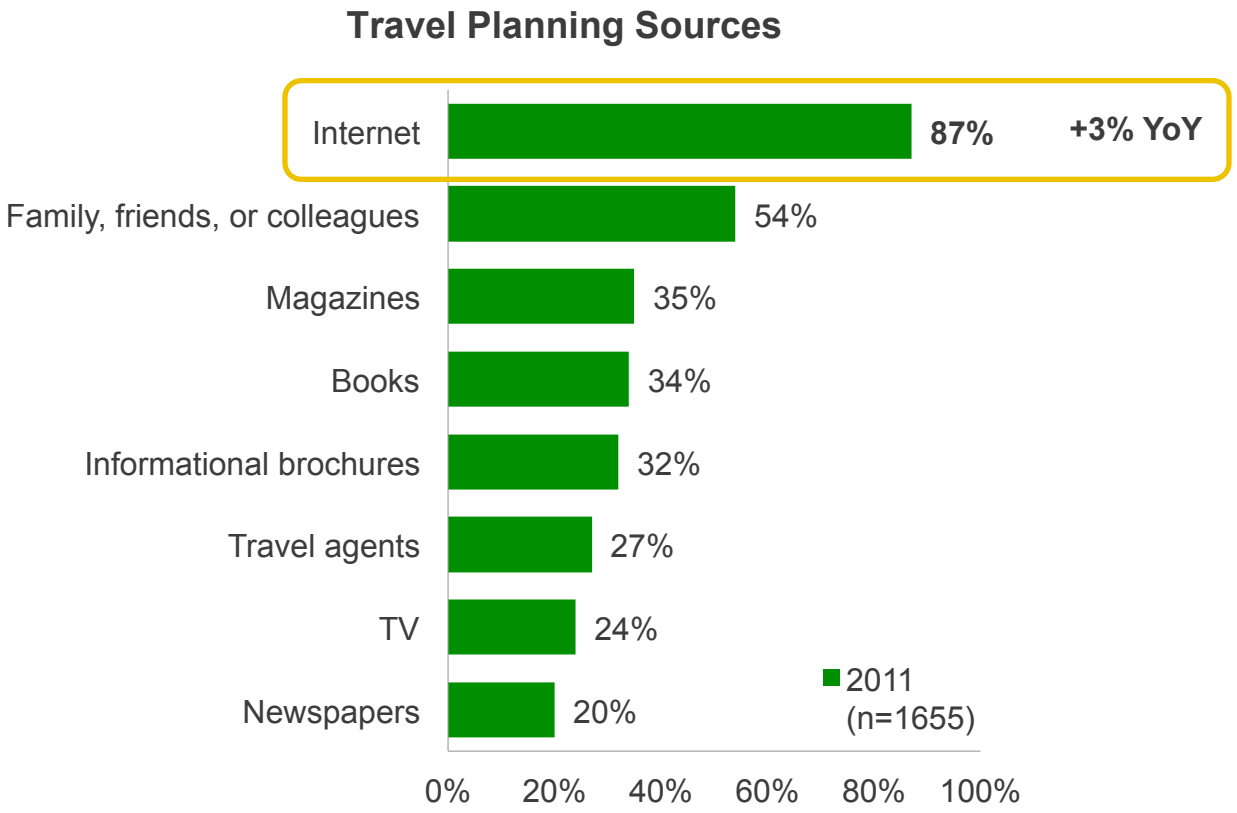
Base: Personal Traveler 2011 (3500). Business Traveler 2011 (1500)
Q: Which of the following sources do you typically use to plan personal or leisure trips/business trips?
Source: Google/OTX, Traveler's Road to Decision 2011, U.S., Jul 2011
www.thinkwithgoogle.com/insights

# The Internet is Key to Affluent Traveler Planning and Booking




**43%**

Of affluent travelers report that the internet prompted them to book (up from 38% in 2010).

Base: Affluent Travelers (2011: 1655; 2010: 983).
Q.: Which of the following sources do you typically use to plan trips? Please indicate the statements that you feel apply to each source of information.
Note: * indicates a significant difference between 2010 and 2011 at the 95% confidence level
Source: Google/OTX, Traveler's Road to Decision 2011, U.S., Jul 2011
www.thinkwithgoogle.com/insights

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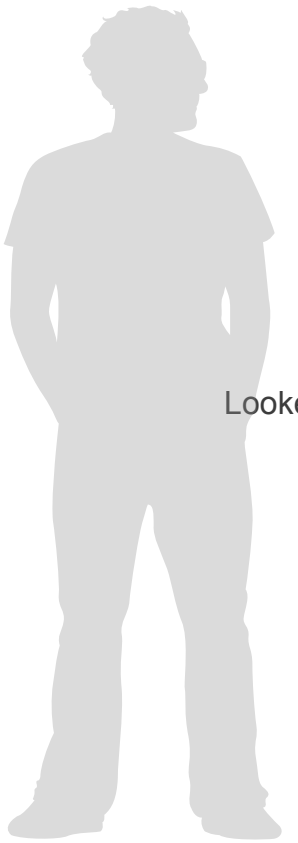
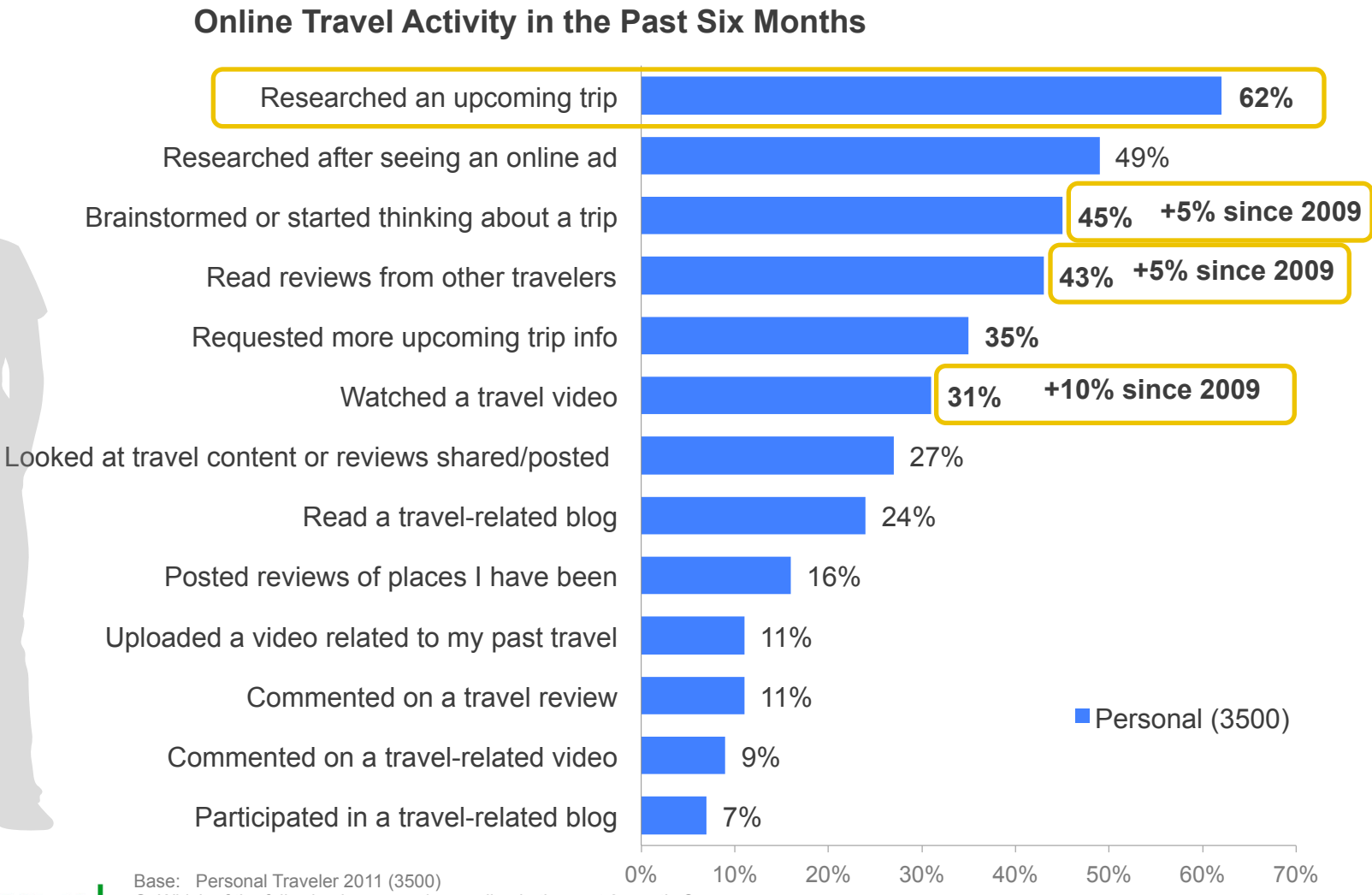
# Research is the Top Online Activity for Personal Travelers



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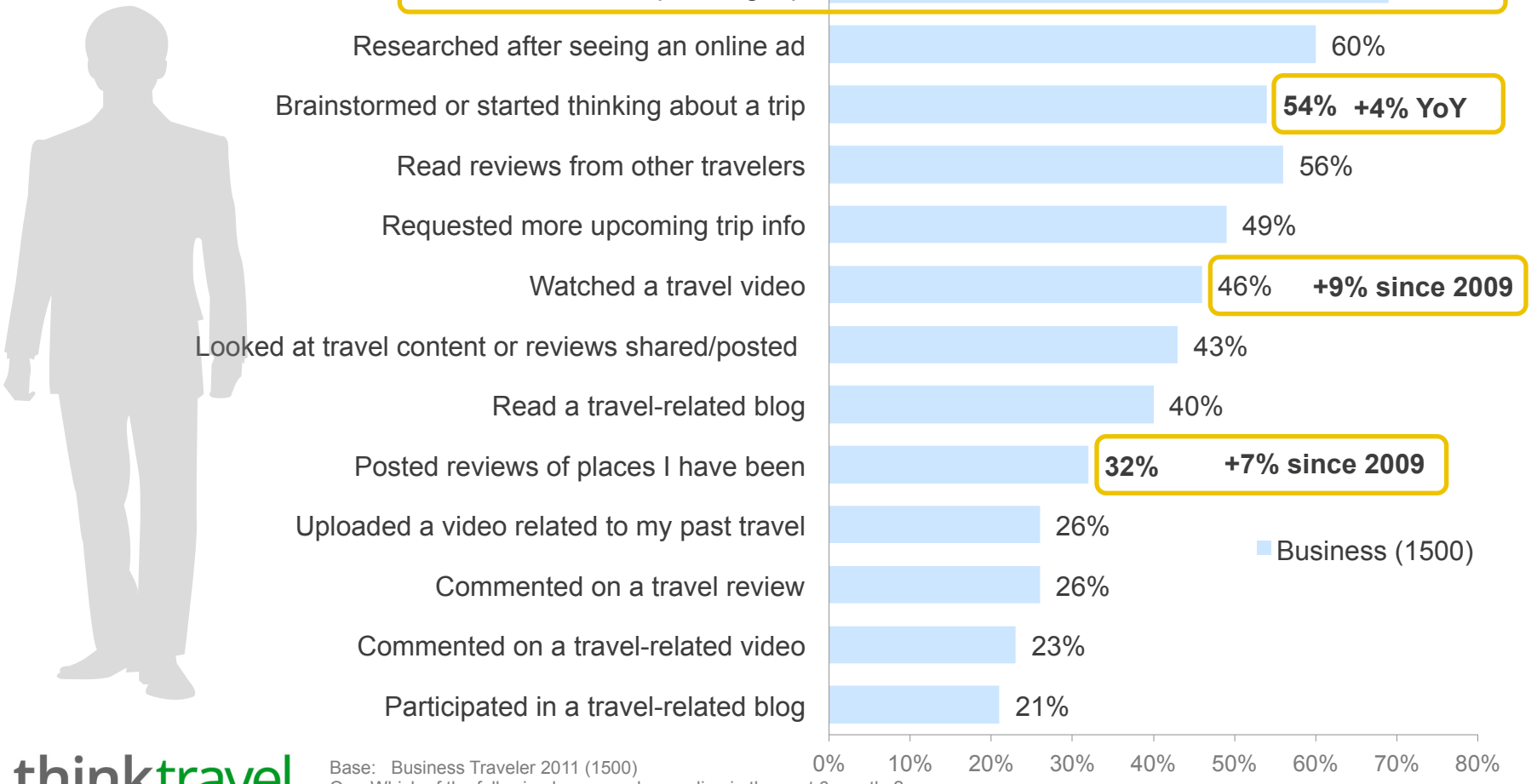
Base: Personal Traveler 2011 (3500)
Q: Which of the following have you done online in the past 6 months?
Note: *indicates a significant difference YoY at the 95% confidence level
Source: Google/OTX, Traveler's Road to Decision 2011, U.S., Jul 2011
www.thinkwithgoogle.com/insights

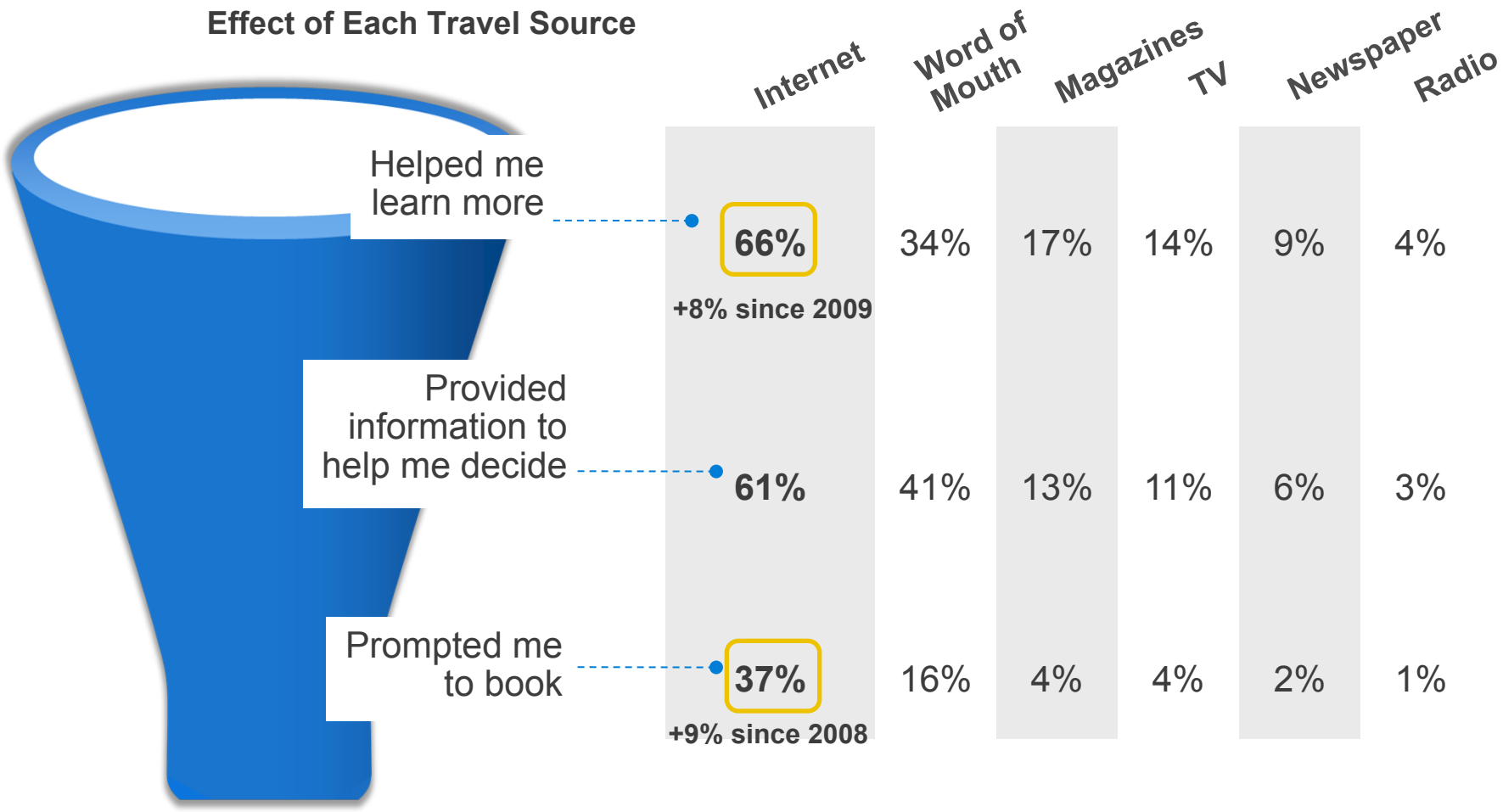
# Business Travelers are Highly Engaged in the Online Space




thinktravel with Google

Base: Business Traveler 2011 (1500)
Q. Which of the following have you done online in the past 6 months?
Source: Google/OTX, Traveler's Road to Decision 2011, U.S., Jul 2011
www.thinkwithgoogle.com/insights

# The Internet is Used Throughout the Purchase Funnel



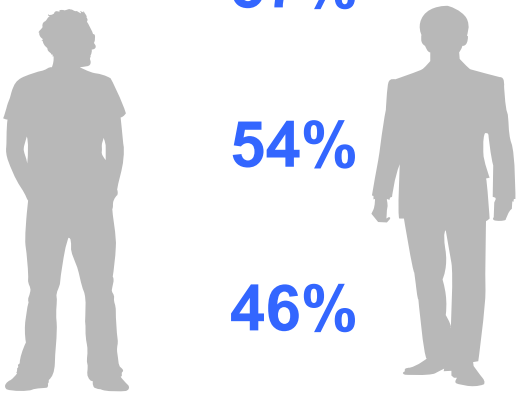

thinktravel with Google

Base: Used one of the above as sources to plan. Personal Traveler 2011 (3317). Business Traveler 2011 (1330)
Q: Listed are some of the sources typically used to plan personal or leisure/business trips. Please indicate the statements which you feel apply to each source of information.
Source: Google/OTX, Traveler's Road to Decision 2011, U.S., Jul 2011
www.thinkwithgoogle.com/insights

# The Internet Taps Into Social Elements of travel

**% of travelers who agree or strongly agree with the following statements…**

| | Personal | Business |
|---|---|---|
| I share pictures of my vacation online. | 53% | 52% |
| I enjoy reading experiences, reviews, and information from people like me. | 49% | 57% |
| I have made travel plans based on reviews and experiences of others. | 45% | 54% |
| I use social networking to share my travel-related experiences. | 40% | 46% |
| I like to participate in web discussions about travel related topics. | 23% | 39% |



Base: Total Respondents. Personal Travelers (3500) Business Travelers (1500).
Q: Below are some statements that may or may not describe your attitudes and opinions related to travel. Please indicate how much you agree or disagree with each statement. (Top 2 box)
Source: Google/OTX, Traveler's Road to Decision 2011, U.S., Jul 2011
www.thinkwithgoogle.com/insights

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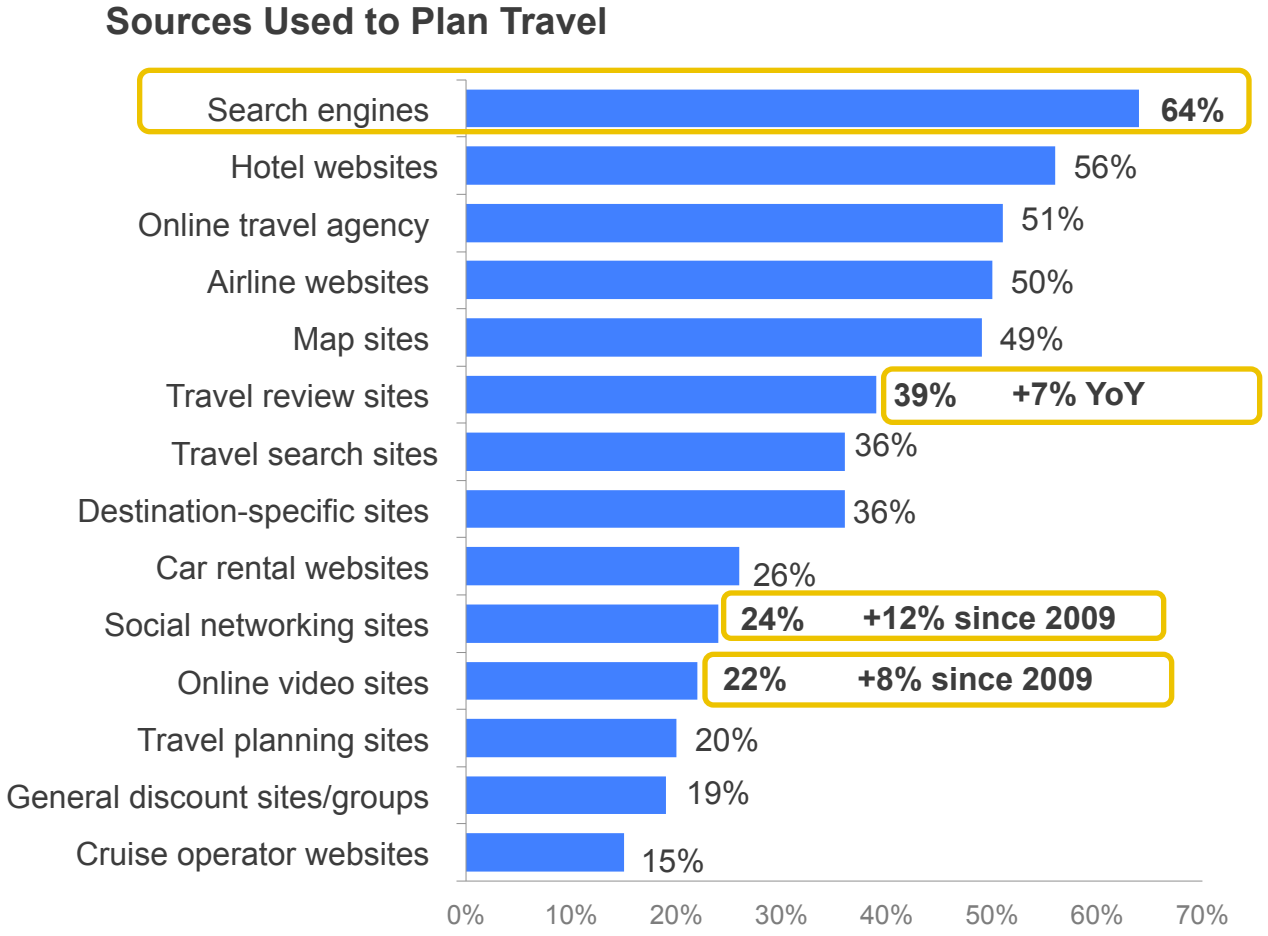
# Search Remains the #1 Planning Source for Personal Travel



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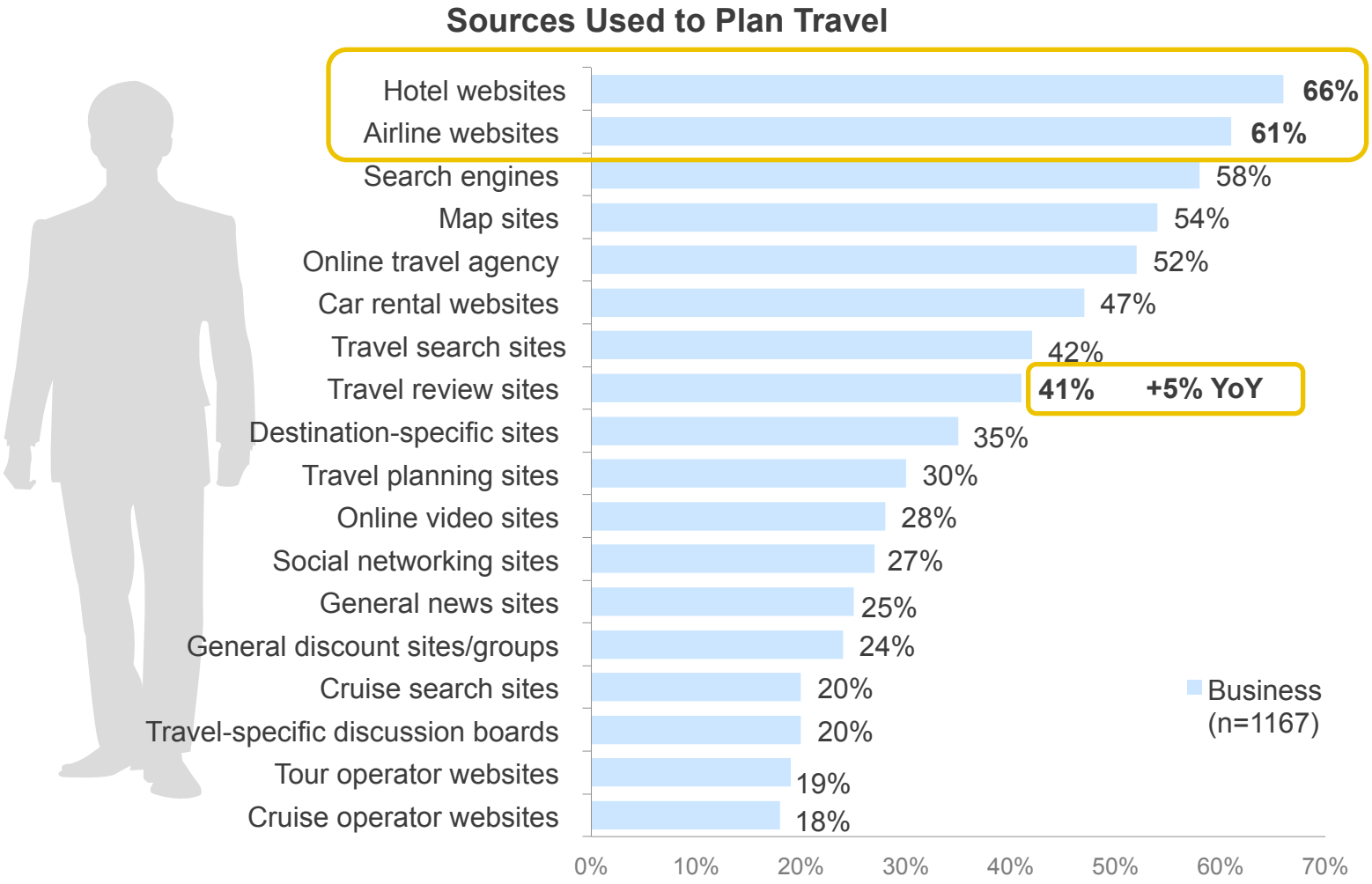
Base: Use internet to plan trip. Personal Travelers (2989) Business Travelers (1167).
Q. Which of the following online sources do you typically use to plan personal or leisure/ business trips?

Source: Google/OTX, Traveler's Road to Decision 2011, U.S., Jul 2011
www.thinkwithgoogle.com/insights

# Supplier Sites are Core to Business Travel Planning




thinktravel with Google

Base: Use internet to plan trip. Personal Travelers (2989) Business Travelers (1167).
Q. Which of the following online sources do you typically use to plan personal or leisure/business trips?

Source: Google/OTX, Traveler's Road to Decision 2011, U.S., Jul 2011
www.thinkwithgoogle.com/insights

# Search is a Key Component of the Travel Planning and Purchasing Process

**55%**

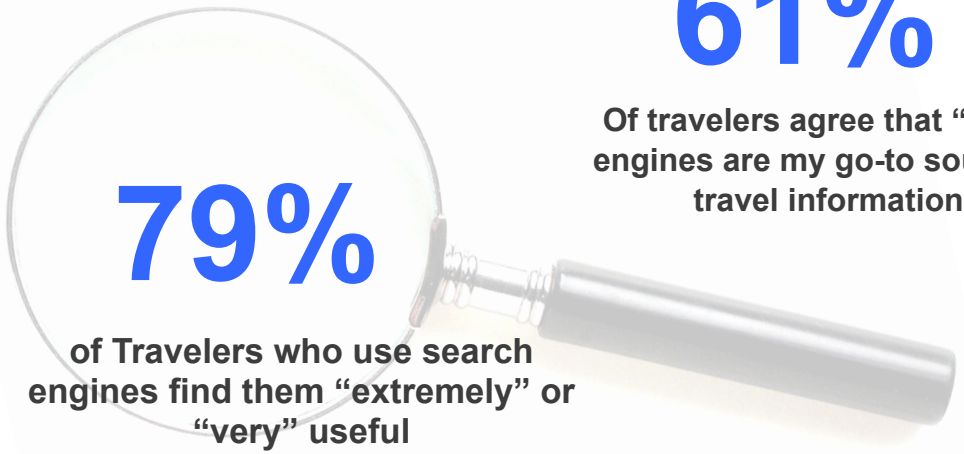
**Of travelers say "always start my travel booking and shopping process with search."**

**61%**

**Of travelers agree that "search engines are my go-to source for travel information"**

**79%**

**of Travelers who use search engines find them "extremely" or "very" useful**



## Search Engine Users Most Often Seek:

Overnight Accommodations

Destinations

Vacation Activities

Air Travel

Road Trips

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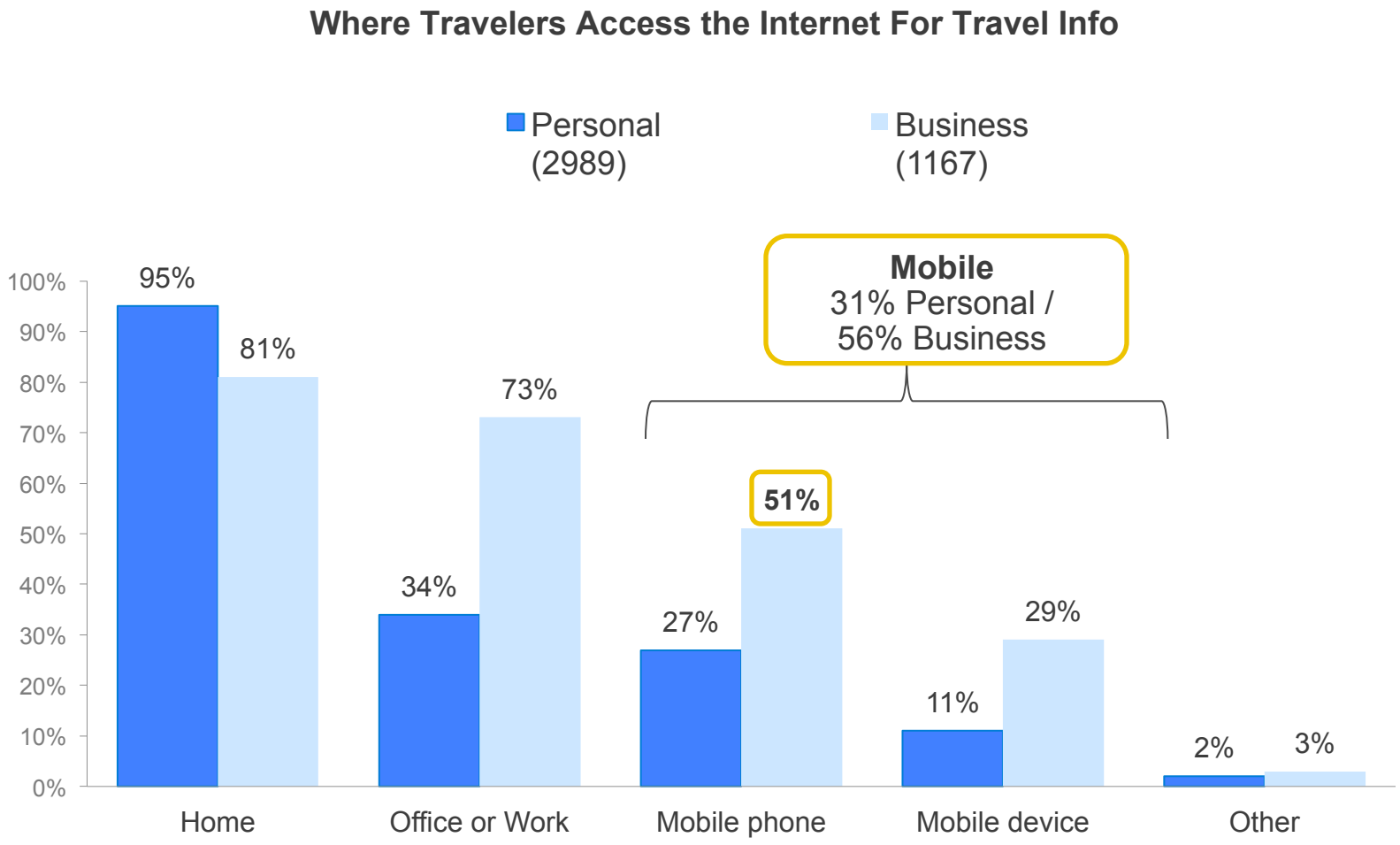
Base: Total Respondents. Personal (3500) Business (1500). Also: Use Internet to Plan trip. Personal (2989), Business (1167). Also: Search Engine Users. Personal (2940) and Business (1141).
Q: Please indicate how much you agree or disagree with each statement. Also: How useful are search engines to you while you plan your trips. Also: How often do you search for information on the following when planning your trips?
Source: Google/OTX, Traveler's Road to Decision 2011, U.S., Jul 2011
www.thinkwithgoogle.com/insights

# Travelers Access the Internet in Multiple Ways




Base: Use Internet to Plan trip. Personal (2989), Business (1167).
Q: From which of the following locations do you access the internet for travel-related information?
Source: Google/OTX, Traveler's Road to Decision 2011, U.S., Jul 2011
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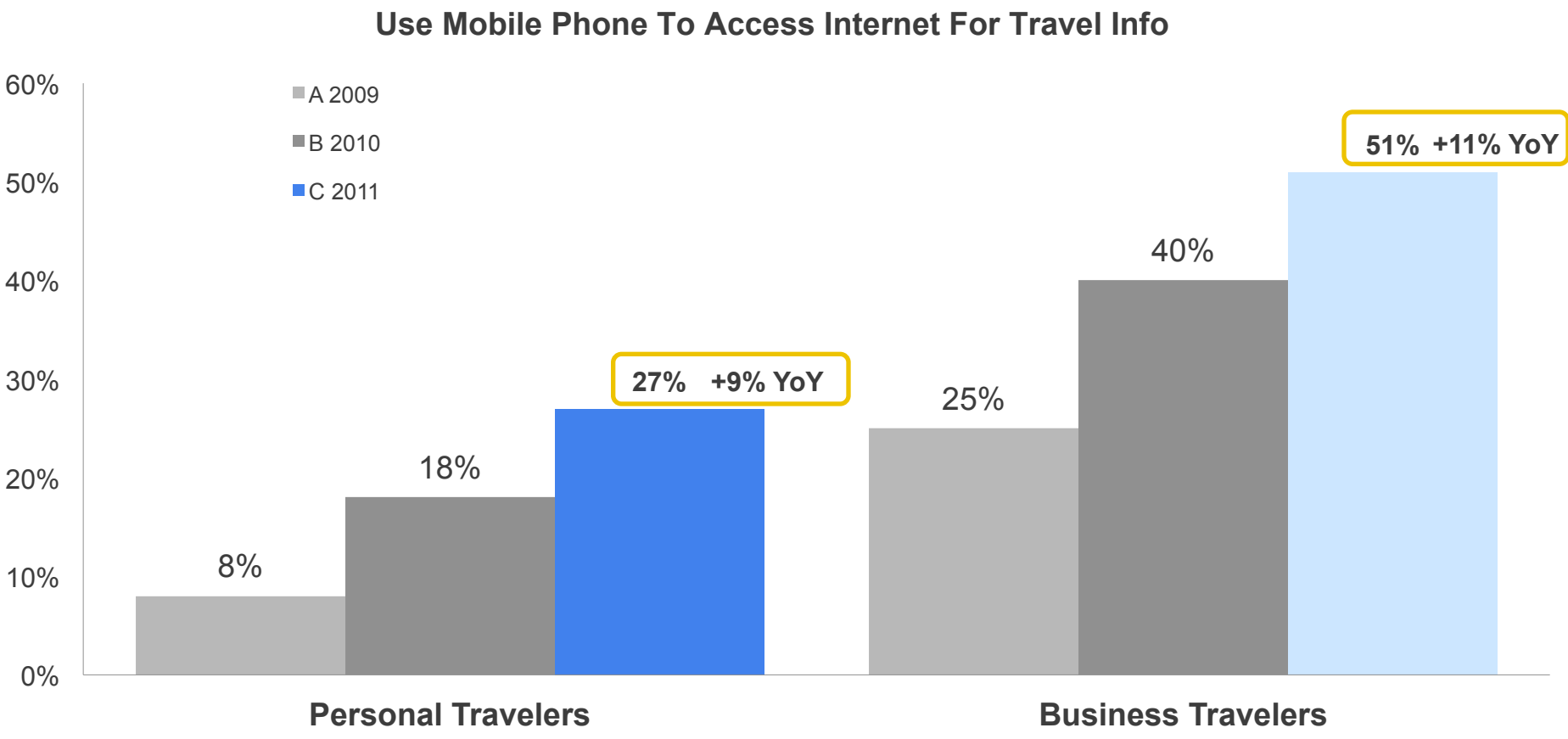
# Mobile

# Use of Mobile Phones for Travel Info Is Growing Significantly Year Over Year




Base: Used Internet as a source to plan trip.
Q: From which of the following locations do you access the Internet for travel-related information when planning your ? (Select ALL that apply)…
Source: Google/OTX, Traveler's Road to Decision 2011, U.S., Jul 2011
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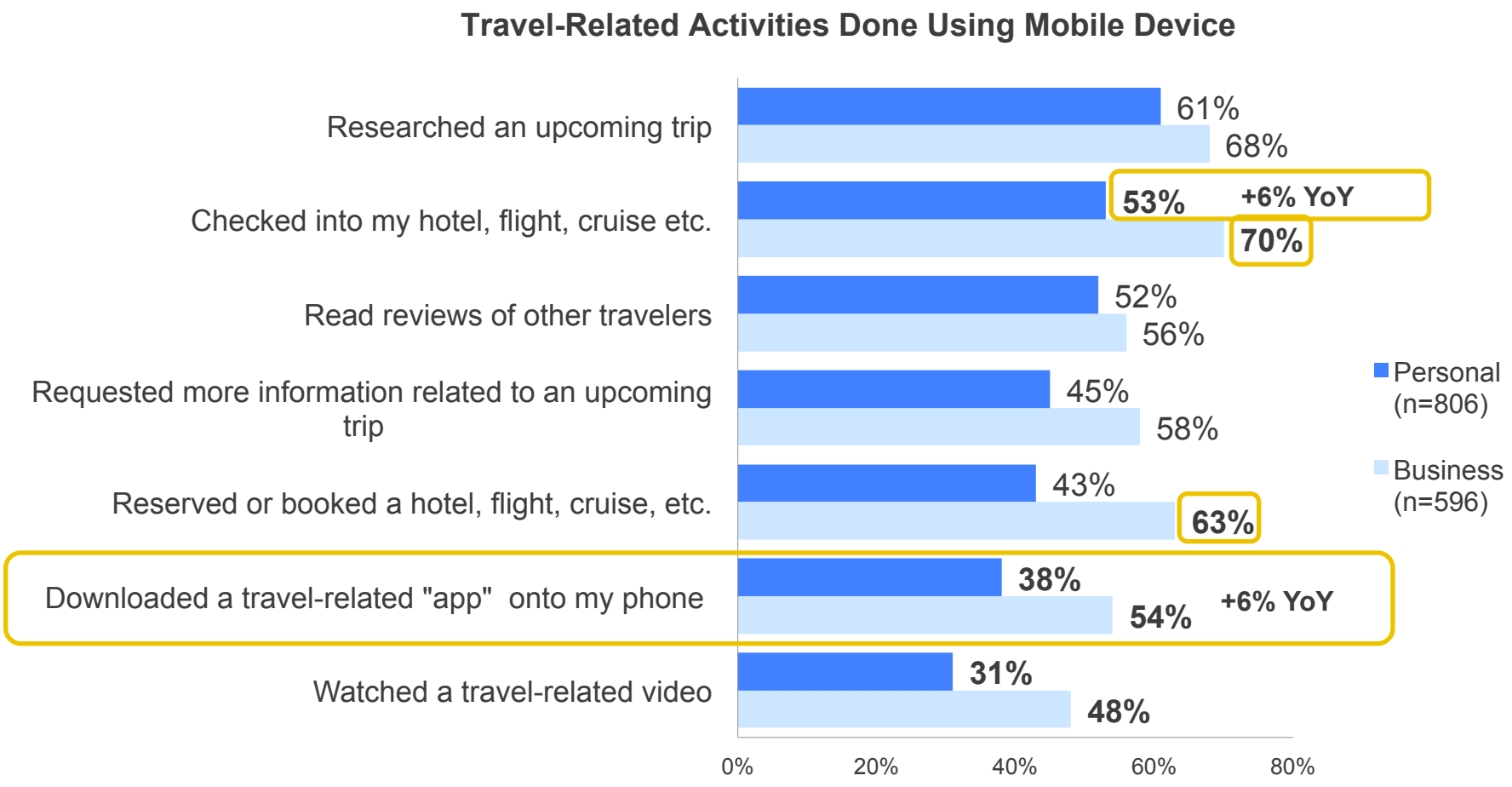
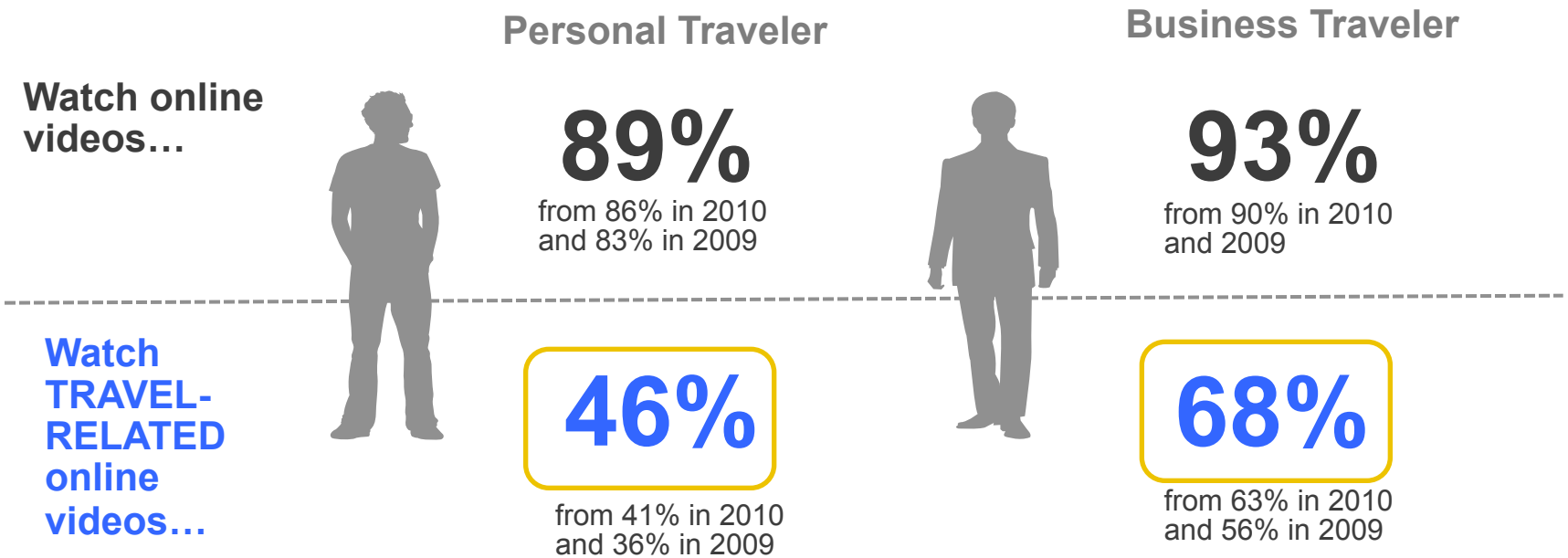
# Travelers Rely on Mobile Devices to Research Travel Information Online




Base: Use mobile device for travel-related information. Personal (806), Business (596).
Q: Thinking about your personal or leisure/business travel, which of the following travel-related activities have you used your mobile device for in the past year?
Source: Google/OTX, Traveler's Road to Decision 2011, U.S., Jul 2011
www.thinkwithgoogle.com/insights

# Online Video

# Online Video Use in Travel has Grown Steadily Over the Past 2 Years




**85%** Of travelers use YouTube to watch videos.

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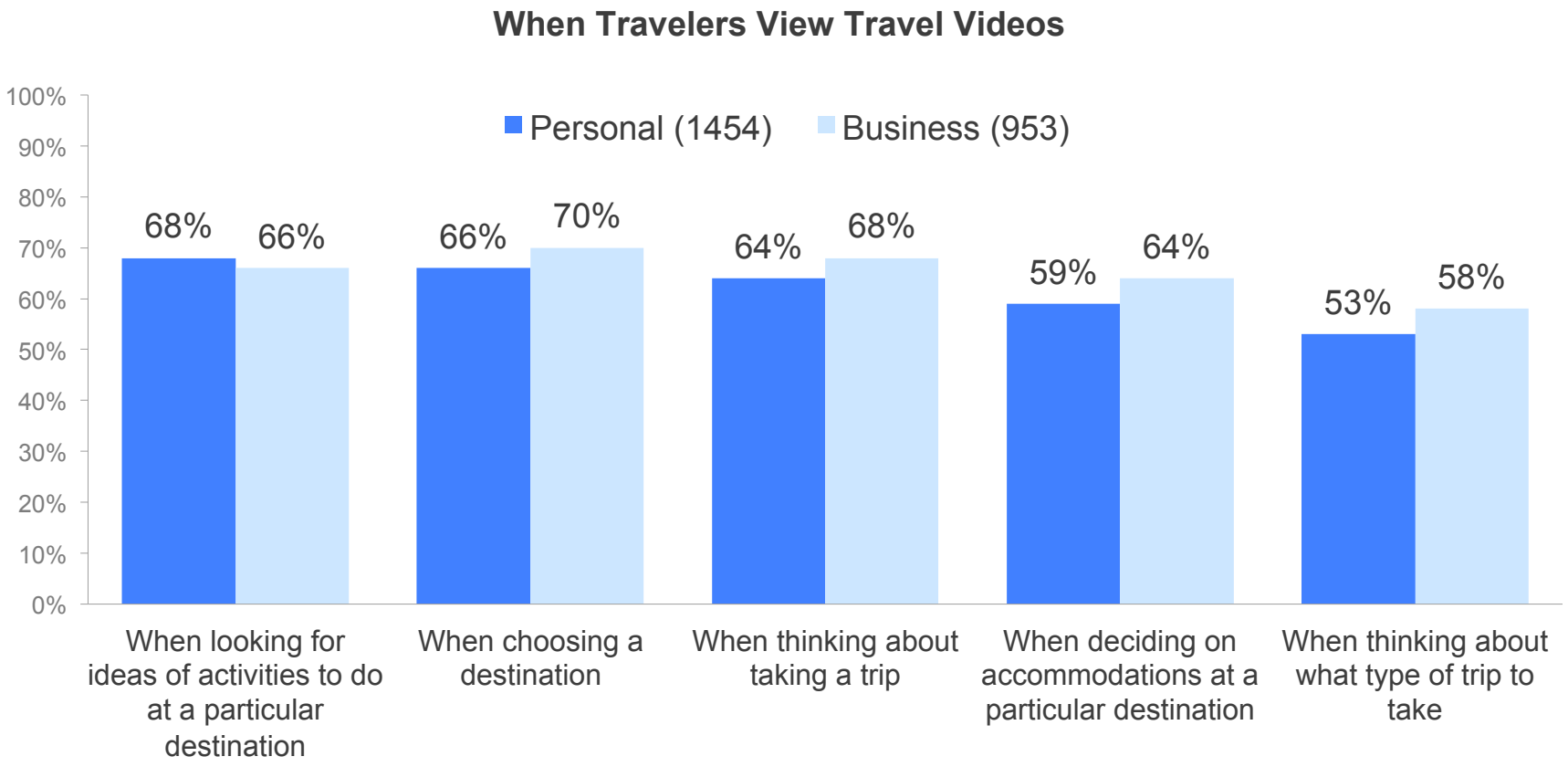
Base: Personal Travelers 2009-2011 (3450, 3500, 3500) Business Travelers 2009-2011 (1552, 1500,1500)
Q: Typically, how often do you watch videos online? What types of videos have you ever watched on the Internet? On which of the following websites do you watch videos?
Source: Google/OTX, Traveler's Road to Decision 2011, U.S., Jul 2011
www.thinkwithgoogle.com/insights

# Travelers View Videos Online During All Phases of Trip Planning

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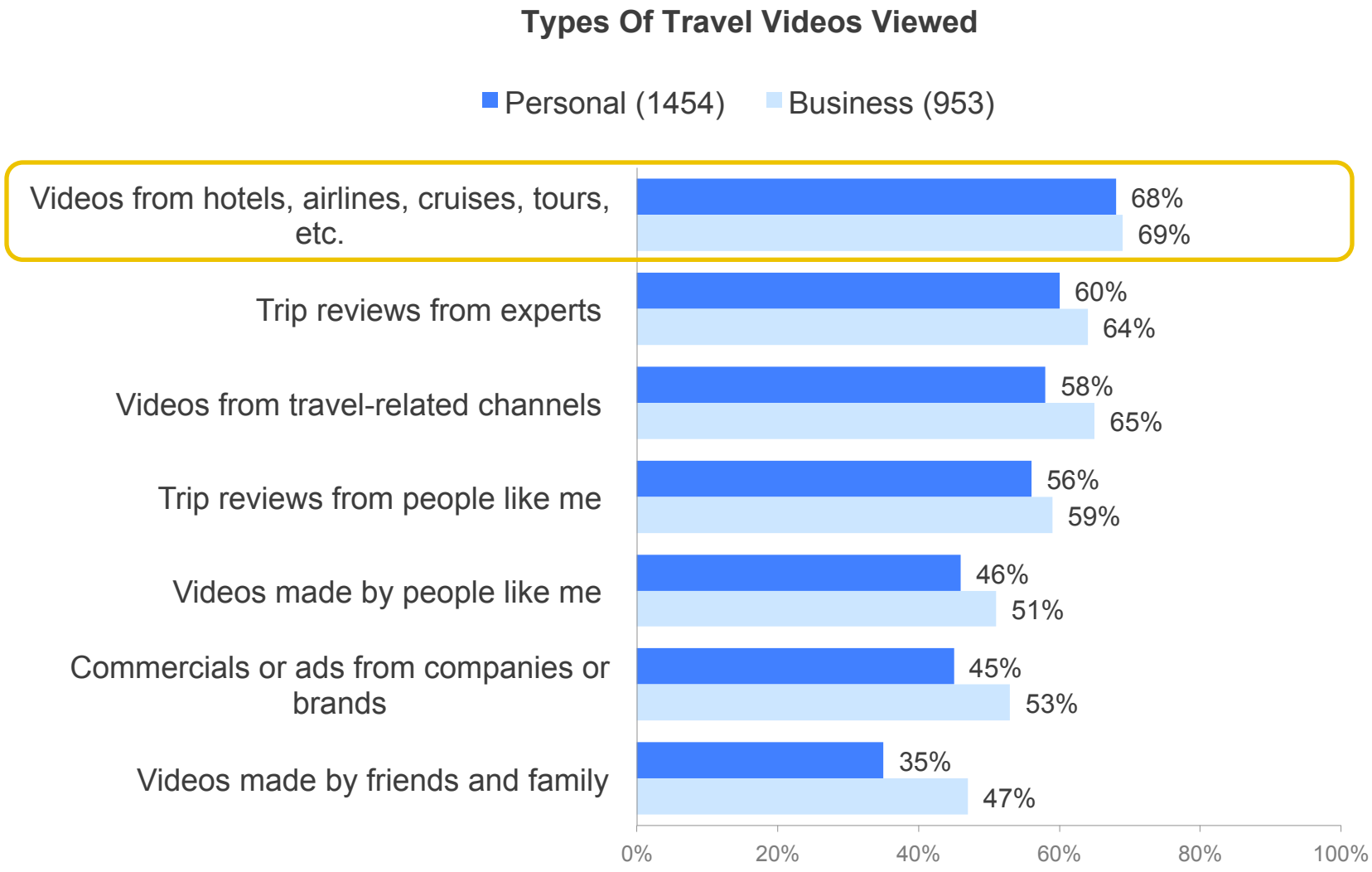
Base: Watch Travel Videos Online . Personal (1454), Business (953).
Q. At what points in your travel planning process do you view videos online?
Source: Google/OTX, Traveler's Road to Decision 2011, U.S., Jul 2011
www.thinkwithgoogle.com/insights

# Travelers Are Watching Official Video Content

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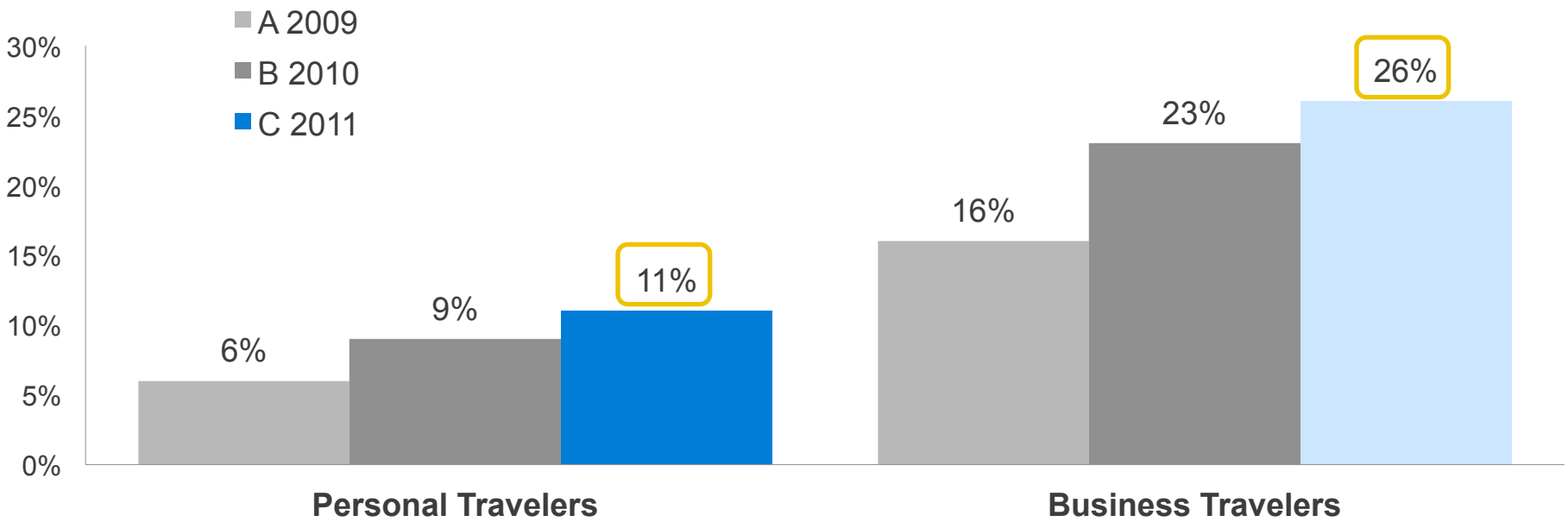
Base: Watch Travel Videos Online. Personal (1454), Business (953).
Q. Specifically, what types of travel-related videos do you watch online?
Source: Google/OTX, Traveler's Road to Decision 2011, U.S., Jul 2011
www.thinkwithgoogle.com/insights

# Video is a Platform for Sharing Travel Experiences

**"I uploaded a video related to my past travel in the past 6 months"**

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Base: Total respondents. Personal (2500), Business (1500)
Q. Which of the following have you done online in the past 6 months?
Source: Google/OTX, Traveler's Road to Decision 2011, U.S., Jul 2011
www.thinkwithgoogle.com/insights

# Wrap-Up

# Takeaways and Thought-Starters

| | | |
|---|---|---|
| 1 | The **positive outlook for travel continues in 2011**, as the majority of travelers planning to take the 'same or more' trips has grown over the past two years. | *Has your brand seen **positive consumer engagement** and how are you tracking that? Are you creating an engaging reason for travelers to turn to your brand – before and even after their trip ends?* |
| 2 | The **internet continues to be the most prevalent tool** for researching and booking travel. | *Are you reaching out to travelers **via the right channels**? Does your messaging convey your competencies? Are you considering the entire purchase funnel? Are you remarketing?* |
| 3 | Primarily for reasons related to ease and cost, **search engines** are commonly used and the top online source for Personal Travelers. | *Think **coverage** – of keywords and of devices. Are you efficiently reaching consumers at scale with search? In mobile? Throughout the funnel? Does your creative reflect consumer interests?* |
| 4 | **Reliance on mobile devices** for travel activity continues to grow considerably. | *Are you present for consumers **searching and browsing on mobile**? Is mobile a functioning extension of your current efforts? Have you implemented click-to-call ads to increase CTR?* |
| 5 | **Online videos** are increasingly popular for travel-related activity. | *Do you have **videos** on your website and other popular video sites? Are you driving people to them? What assets can you create?* |

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Source: Google/OTX, Traveler's Road to Decision 2011, U.S., Jul 2011
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