The 2013 Traveler

November 2013

WHAT WE WANTED TO KNOW

How have the attitudes and behaviors of **leisure and business travelers** changed over the past year?

WHAT WE FOUND

The Traveler’s Mindset
Travelers seek value and comparison shop with increasing frequency. Business travelers prioritize price, convenience and prior experience.

Inspiration: A Fresh Opportunity to Reach Travelers Online
Most consider the web to be important for travel research and planning, but the web is also a fundamental source of inspiration for new travel. Search remains key for leisure and business travelers as they seek a variety of content and information online.

Multi-screen World: Research Across Devices
Travel planning is no longer limited to a single screen. Travelers move sequentially across devices to complete tasks, often with search being the unifying activity.

Online Video: A Traveler's Constant Companion
Travelers are watching more videos online to help make decisions — where to go, what to do, how to book. Business and leisure travelers create and share online videos of their trips.

Leisure travelers **seek travel inspiration online,** anticipate **more family travel**, and want to **stay connected** while traveling

68%

began researching online before they decided where or how to travel **versus 65% in 2012.**

49%

plan to travel more frequently with family in the coming year **versus 46% in 2012.**

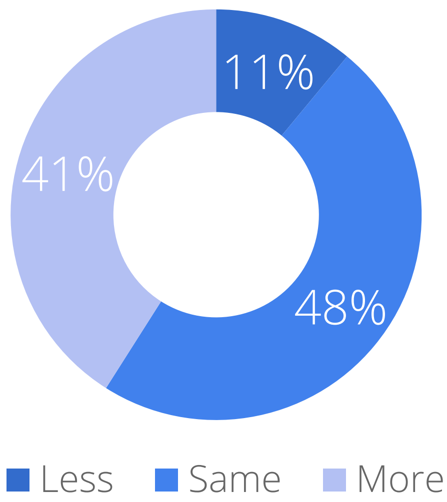
42%

are more likely to use their smartphone* or tablet for travel- or vacation-related information while on a trip **versus 33% in 2012.**

Source: Ipsos MediaCT/Google Travel Study, Waves 4 and 5, April–May 2012 and May–June 2013.
Base: Personal Quota, Q21: 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. (Select ONE for each statement)
*Wording changed from "mobile device" in 2013

Business travelers continue to prioritize **brand sites, price and convenience**

PREDICTED TRAVEL FREQUENCY VS. 2012



65%

book travel directly on company sites more often than via online travel agencies, **an 11% increase from last year.**

TOP 3 IMPORTANT FEATURES WHEN SELECTING TRAVEL

Air Travel	1. Price 2. Most convenient departure/arrival times 3. Fewer stops, better connections
Lodging	1. Price 2. Most convenient location 3. Past experience with establishment
Car Rental	1. Price 2. Past experience 3. Reward/travel points

Source: Ipsos MediaCT/Google Travel Study, May–June 2013.
Q24/25 Base: Business Quota / Q21: Here are some statements that may or may not subscribe your attitudes and opinions related to travel. Please indicate how much you agree or disagree with each statement. / Q24: Thinking about any traveling that you may do in 2013 for business purposes, would you say the number of trips you'll take will be... (Select ONE). / QR9/QA5/AH3 Base: Business + Air, Hotel, Car Quotas. / QR9: What are the most important factors to you when deciding on a vehicle to rent when travelling on each type of business trip? (Select up to 3 for each type of trip.) / QA5/QH3: How important are each of the following when [purchasing an airline ticket / choosing lodging accommodations] for business travel? (Select ONE for each)

Travelers across segments **seek value and frequently comparison shop**

TRAVELERS WHO PLAN TO SPEND MORE TIME RESEARCHING
BEFORE BOOKING TRAVEL BECAUSE FINDING VALUE IS IMPORTANT

66%

of leisure travelers
vs. 66% in 2012.

60%

business travelers
vs. 56% in 2012.

52%

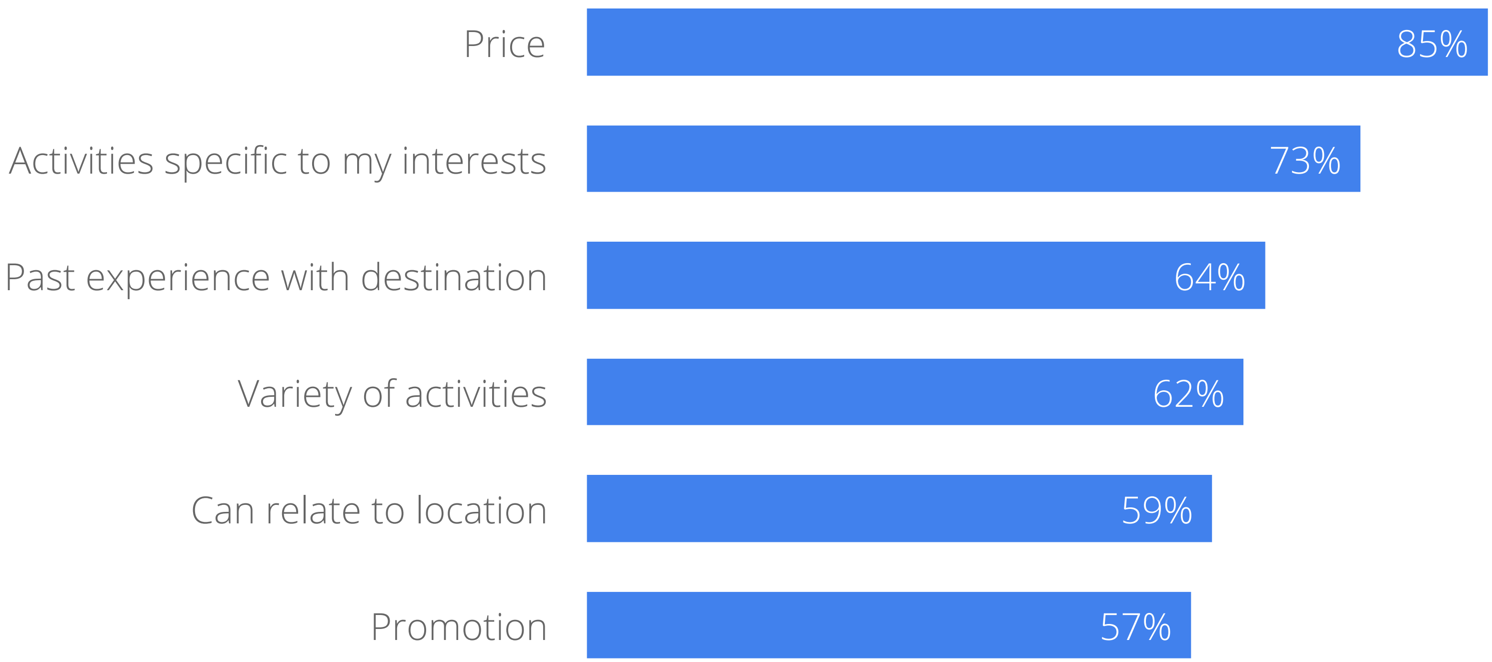
affluent travelers
vs. 57% in 2012.

Tips for Marketers
Think about how your brand can stay top of mind with travelers from the initial awareness phase down to consideration and booking.

Source: Ipsos MediaCT/Google Travel Study, May–June 2013.
Q23/Q26: Using the scale below, please indicate how much you agree or disagree with each of the following statements about traveling for [personal/ leisure / business] purposes in the next year. (Select ONE for each statement)

Beyond price, leisure travelers seek destinations with **relevant and varied activities**

MOST IMPORTANT FEATURES WHEN CHOOSING DESTINATION (EXTREMELY/VERY IMPORTANT)



Source: Ipsos MediaCT/Google Travel Study, May–June 2013.
Base: Personal Quota (n = 3500) / QD10: How important are each of the following when choosing a destination for personal or leisure trips? (Select ONE for each)

Loyalty program membership increases the likelihood of booking, but it is never guaranteed

INCREASED LIKELIHOOD OF BOOKING

Loyalty/Reward Program	Leisure	Business
Airline	76%	86%
Hotel	75%	84%
Car rental	71%	79%
Online travel agency	60%	67%

38%

of business travelers are **less likely** to plan travel based on loyalty programs or points in 2013 than they were in 2012.

Source: Ipsos MediaCT/Google Travel Study, May–June 2013.
C1A: And how does being a member of the following loyalty/reward(s) program(s) impact your decision to book with a particular company? Would you say you are... (Select ONE for each) / Base: Loyalty/reward program members (floating), Leisure n = 404, Business n = 190 / Q26: 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. (Select ONE for each statement) / Base: Business Travelers n = 1500

Leisure and business worlds are blending

57%

of business travelers plan to extend a business trip to include leisure time when traveling.

43%

of business travelers plan to research or use peer-to-peer sharing alternatives, such as Airbnb or Zipcar, traditional hotels or car-rental services.

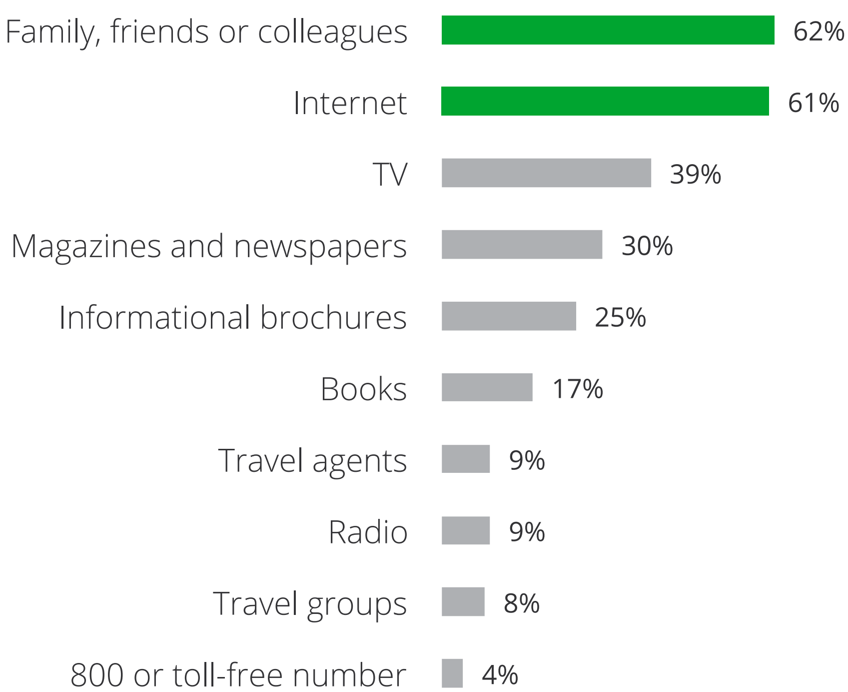
Key Questions for Marketers

1) Does your brand have a presence in each segment?
2) Are there cross- and up-sell opportunities to leverage between segments?

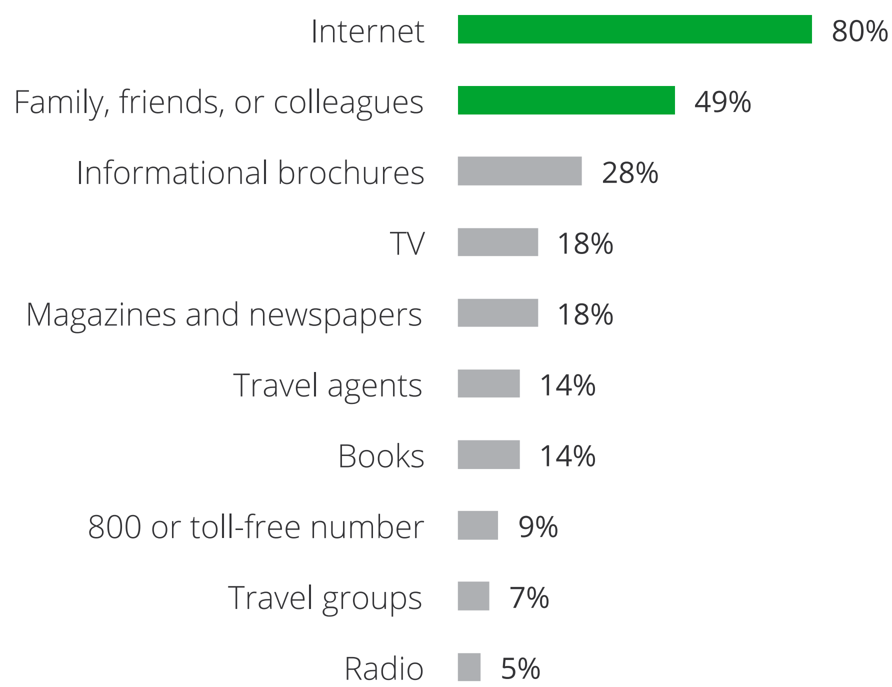
Source: Ipsos MediaCT/Google Travel Study, May–June 2013.
Base: Business Quota n = 1500 / Q26: Using the scale below, please indicate how much you agree or disagree with each of the following statements about traveling for business purposes in the next year. (Select ONE for each statement)

The internet is as essential for **inspiring** new travel as it is for **planning** travel

SOURCES OF INSPIRATION

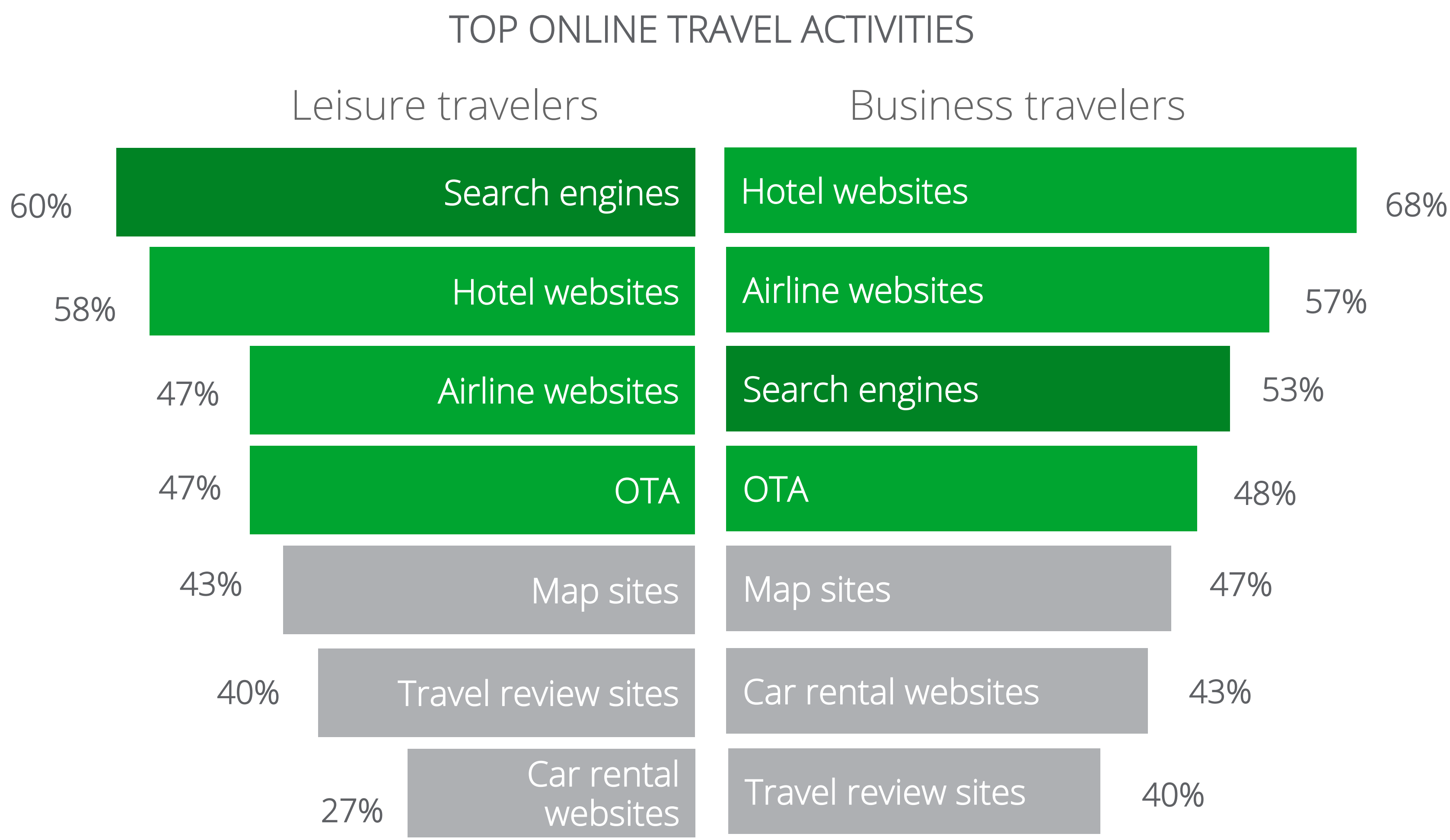


TRAVEL PLANNING SOURCES



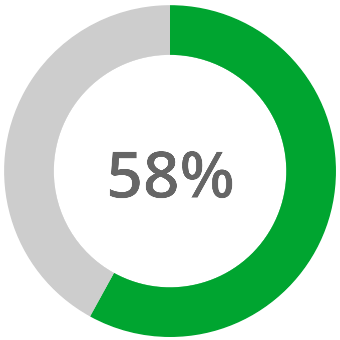
Source: Ipsos MediaCT/Google Travel Study, May–June 2013.
Q6D: Which of the following sources typically inspire you to start thinking about your personal or leisure trips? (Select ALL that apply) / Q7: Which of the following sources do you typically use to plan personal or leisure trips/business trips? / Base: Personal Quota (n = 3500)

Among online sources, travelers mostly rely on **brand sites and search**



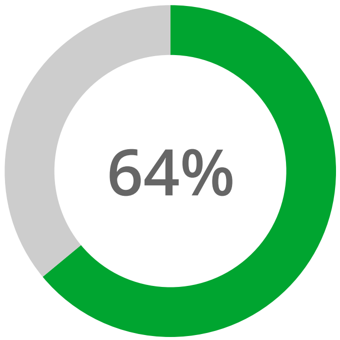
Source: Ipsos MediaCT/Google Travel Study, May–June 2013.
Q10: Which of the following online sources do you typically use to plan personal or leisure trips/business trips? (Select ALL that apply) / Base: Use Internet to plan trips; Leisure n = 2787, Business n = 1197

Search remains the #1 source for leisure travelers and #3 source for business travelers



of leisure travelers always "start my travel booking and planning process with search."

Up from 56% in 2012



of business travelers always "start my travel booking and planning process with search."

Up from 58% in 2012

Source: Ipsos MediaCT/Google Travel Study, Waves 4 and 5, April–May 2012 and May–June 2013.
Q21: Here are some (more) 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 / Base: Personal and Business Quotas

Leisure travelers rely on **online travel agencies** for inspiration as well as for destination planning

STAGE OF PLANNING AT WHICH LEISURE TRAVELERS VISIT ONLINE TRAVEL AGENCIES

51%

are considering a few destinations.

43%

know exactly where they're going.

6%

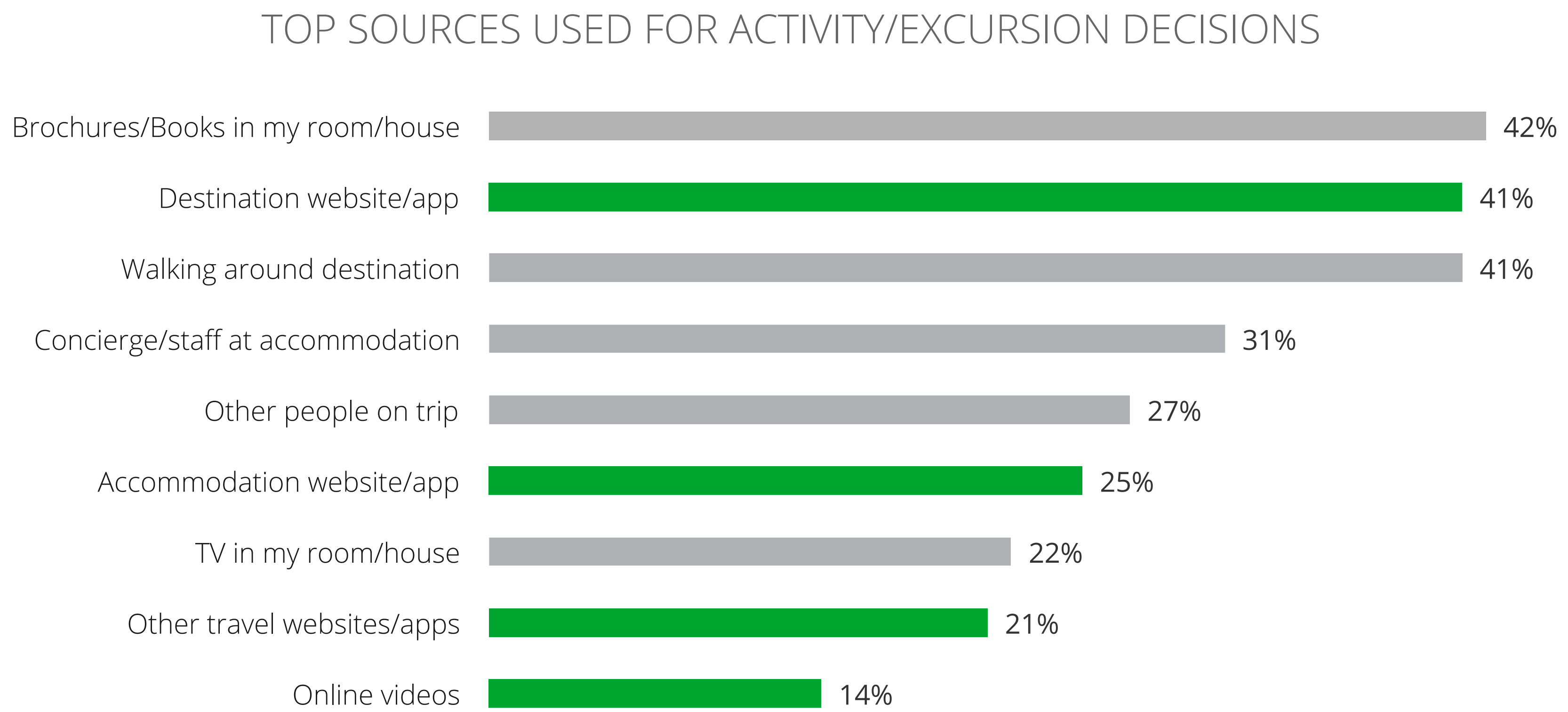
are considering many destinations.

Source: Ipsos MediaCT/Google Travel Study, May–June 2013.
Q10F: When you typically visit online travel agency websites (e.g., Expedia, Travelocity, Priceline, Orbitz, etc.) to plan your personal or leisure trips, how far along are you in deciding where to go? (Select ONE) / Base: Personal Quota and plan using an OTA (n = 1316)

Travelers conduct a **variety of activities** across the web

Source: Ipsos MediaCT/Google Travel Study, April–May 2012 and May–June 2013.
Q4: Which of the following have you done online in the past 6 months? (Select ALL that apply) / Base: Total Respondents n = 5,000

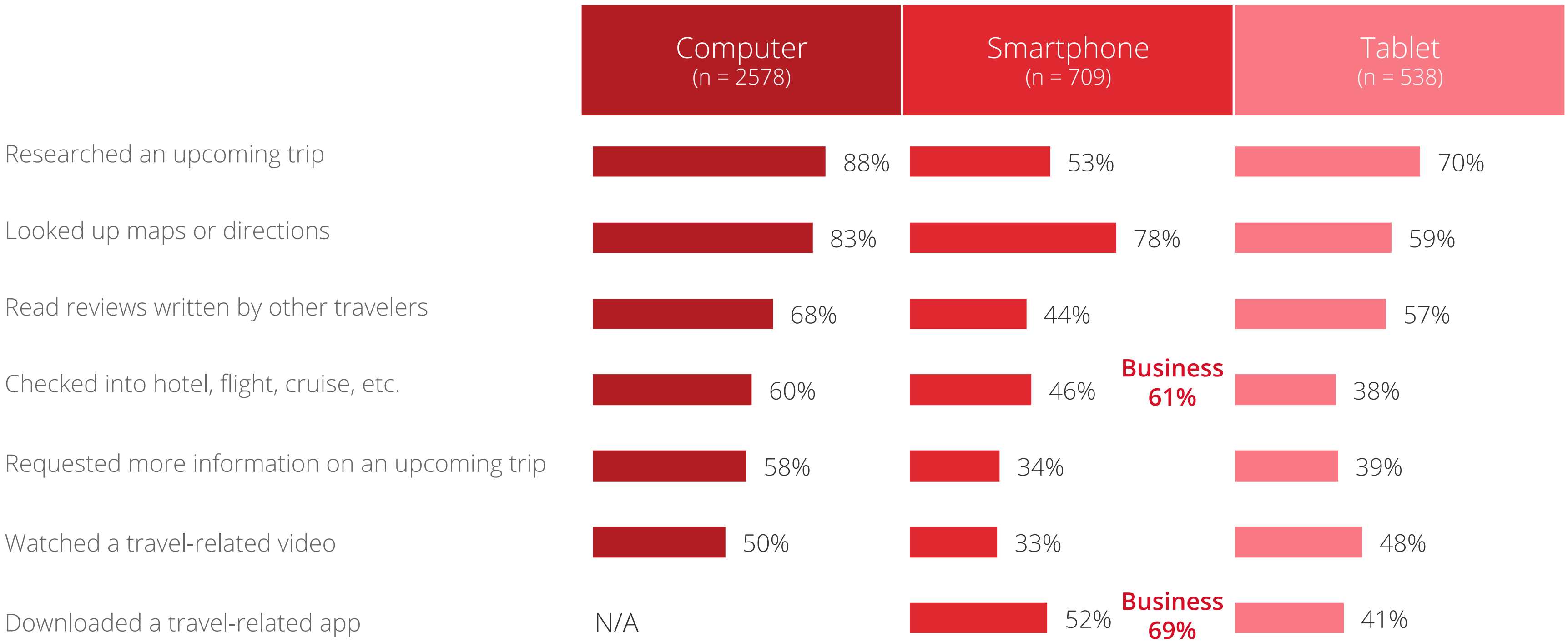
Once at a destination, 58% of leisure travelers rely on online sources to **evaluate local activities**



Source: Ipsos MediaCT/Google Travel Study, May–June 2013.
QD11: When you are on a personal or leisure trip, which sources do you typically use to decide on activities/excursions to participate in once you have arrived at your destination? (Select ALL that apply) / Base: Personal Quota (n = 3500)

Few travel activities are limited to a **single screen**

TRAVEL ACTIVITIES DONE ON DEVICES
(LEISURE ONLY)



Source: Ipsos MediaCT/Google Travel Study, June 2013.
DEVICE1: Thinking about your personal or leisure travel travel in the past 6 months, on which device(s) have you done each of the following travel-related activities? (Select ALL that apply for each activity) / Base: Personal Quota and use specific device for travel research

Sequential device usage: device to device

ACTIVITIES STARTED ON ONE DEVICE AND COMPLETED ON ANOTHER

Key Questions for Marketers:

1) Are you there when travelers are looking for you?
2) How are you valuing incremental activities that happen sequentially across devices?

Source: Ipsos MediaCT,/Google Multiscreen Travel, June 2013.
Q8: Which of the following activities, if any, did you start on one device and continue or finish on another device? / Base: Multiple Device Users Who Ever Did Sequential And Engaged In Specific Online Travel Activity (floating base, n = 706-2778)

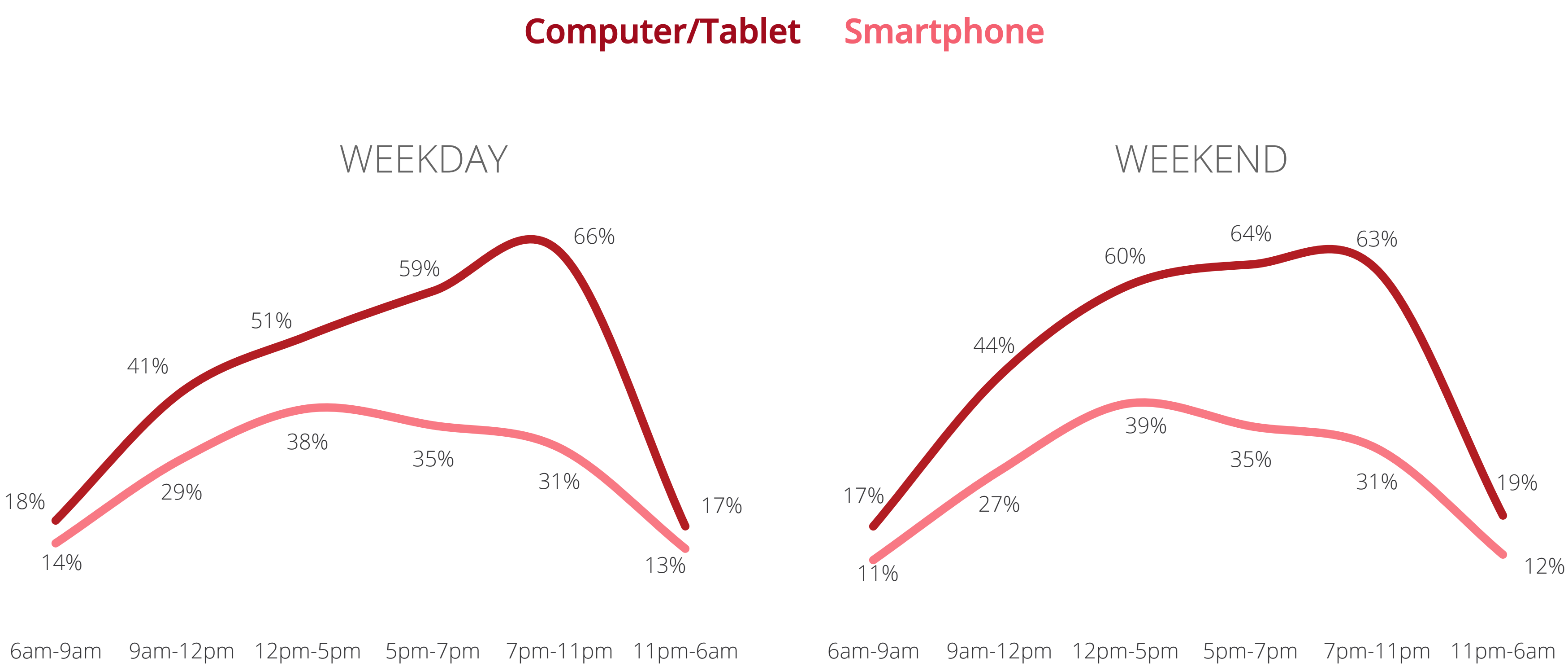
On the ability to plan travel in **micro-increments** throughout the day

Five minutes here, two minutes there, and I booked a trip without taking a huge, long chunk of time to plan everything.

Source: Ipsos HearWatchSay Community, August 2013.

There is less discrepancy between device usage on **weekends**

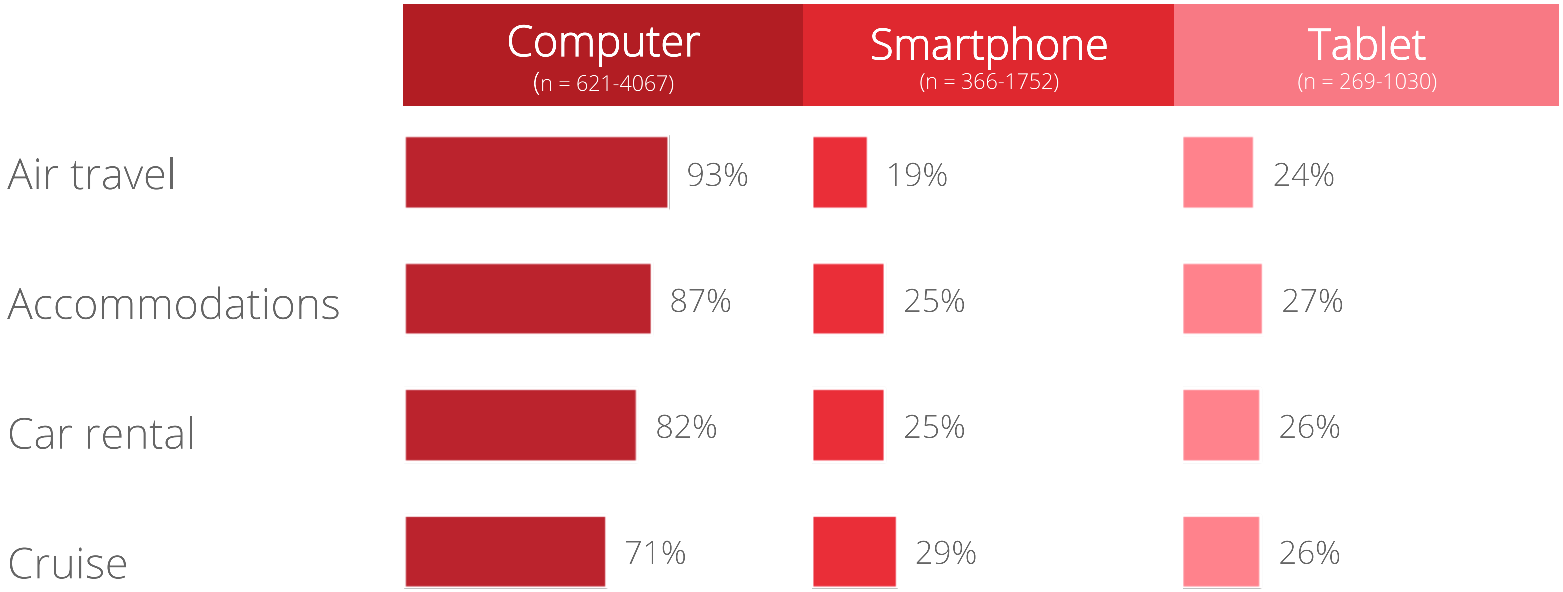
TRAVEL PLANNING THROUGHOUT THE DAY



Source: Ipsos MediaCT/Google Multiscreen Travel, Google and, June 2013.
Q28/29: Thinking about a typical [weekday/weekend] when you were travel planning for [cruise/air travel/car rental/accommodations] in the past 6 months, at which times did you use each device? / Base: Multiple Device Users Who Used the Device for Researching Component AND Planned During Weekdays/Weekends(floating base)

Leisure travelers book travel across devices

TRAVEL BOOKINGS DONE ON DEVICES
(LEISURE ONLY)



Smartphone activity is easy to undervalue

OF THOSE WHO USE SMARTPHONES FOR TRAVEL PLANNING:

1 in 4

book their trip via smartphone.

Air:	*19%*
Hotel:	*25%*
Cruise:	*29%*
Car:	*25%*

3 in 4

book via another route, such as a computer/tablet, direct call or travel agent.

Tips for Marketers:
Connect with travelers across devices. A booking on one device can directly or indirectly result from previous research or activity on another device.

Source: Ipsos MediaCT/Google Multiscreen Travel, June 2013.
Q12: How did you book your personal travel in the past 6 months? / Base: Multiple Device Users Who Used the Device for Travel and Component Included in Trip (floating base)

Travel brands still deliver subpar mobile experiences

HOW CAN TRAVEL BRANDS IMPROVE THEIR MOBILE DEVICE EXPERIENCE?

Speed

"I'd say speed is key. I want the sites I use on my phone to be fast."

Design

"I wish the websites would change their look or formats to be more suited to tablet and phone use."

Action

"I would use [my tablet] for everything if it was more compatible with sites I frequent."

Source: Ipsos HearWatchSay Community, August 2013.

App vs. web: **sites are king of booking**

Smartphone

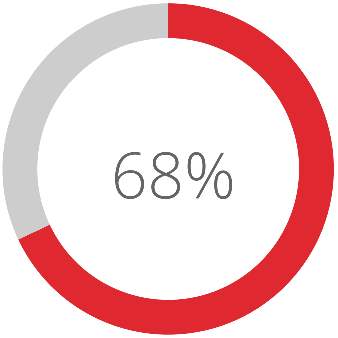
	Browser / Web	App	Called
Any component (net)	**75%**	**54%**	**53%**
Air travel	66%	51%	31%
Car rental	58%	40%	42%
Overnight accommodations	59%	45%	36%
Travel / vacation packages	59%	42%	42%
Vacation activities	61%	38%	42%

Tablet

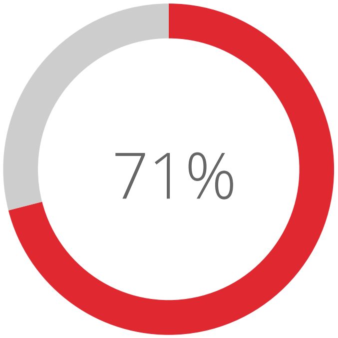
	Browser / Web	App
Any component (net)	**91%**	**51%**
Air travel	78%	42%
Car rental	77%	39%
Overnight accommodations	78%	39%
Cruises	76%	39%
Travel / vacation packages	79%	40%
Vacation activities	82%	37%

Source: Ipsos MediaCT/Google Travel Study, May–June 2013.
QDEVICE4/6: Specifically, how have you booked the following on your [smartphone/tablet]? Again, please think about your personal or leisure trips. (Select ALL that apply for each component) / Base: Personal Quota and booked on smartphone/tablet (Smartphone Netted n=336; Components n = floating 61-219); Tablet Netted n = 255; Components n = floating 67-177)

Ads on smartphones help travelers remember marketers and take action



of travelers recall ads viewed on smartphones **compared to only 59% on desktop.**



of travelers who saw ads on a smartphone took action **compared to just 63% on desktop.**

Source: Ipsos MediaCT/Google Multiscreen Travel, June 2013.
Q38: Below is a list of types of advertising. Which of these types of travel-related ads do you recall seeing on your device(s) during your [component] travel planning process? / Base: Multiple Device Users Who Did Sequential For Component. / Q39: And, which of the following actions, if any, did you take as a result of seeing travel-related advertising on these devices during your [component] planning process in the past 6 months? / Base: Multiple Device Users Who Saw Specific Types of Ads

Travelers **take action** as a result of seeing smartphone ads

TOP ACTIONS TAKEN AS A RESULT OF SEEING TRAVEL-RELATED ADVERTISING

30%

looked for more information on their device.

25%

clicked an ad.

24%

visited the website of the advertiser.

Source: Ipsos MediaCT/Google Multiscreen Travel, June 2013.
Q39: And, which of the following actions, if any, did you take as a result of seeing travel-related advertising on these devices during your [component] planning process in the past 6 months? / Base: Multiple Device Users Who Saw Specific Types of Ads on Smartphones

Online travel video usage is increasing

PERCENTAGE OF TRAVELERS WHO WATCH ONLINE TRAVEL VIDEOS

51%

of leisure travelers **vs. 45% in 2012.**

69%

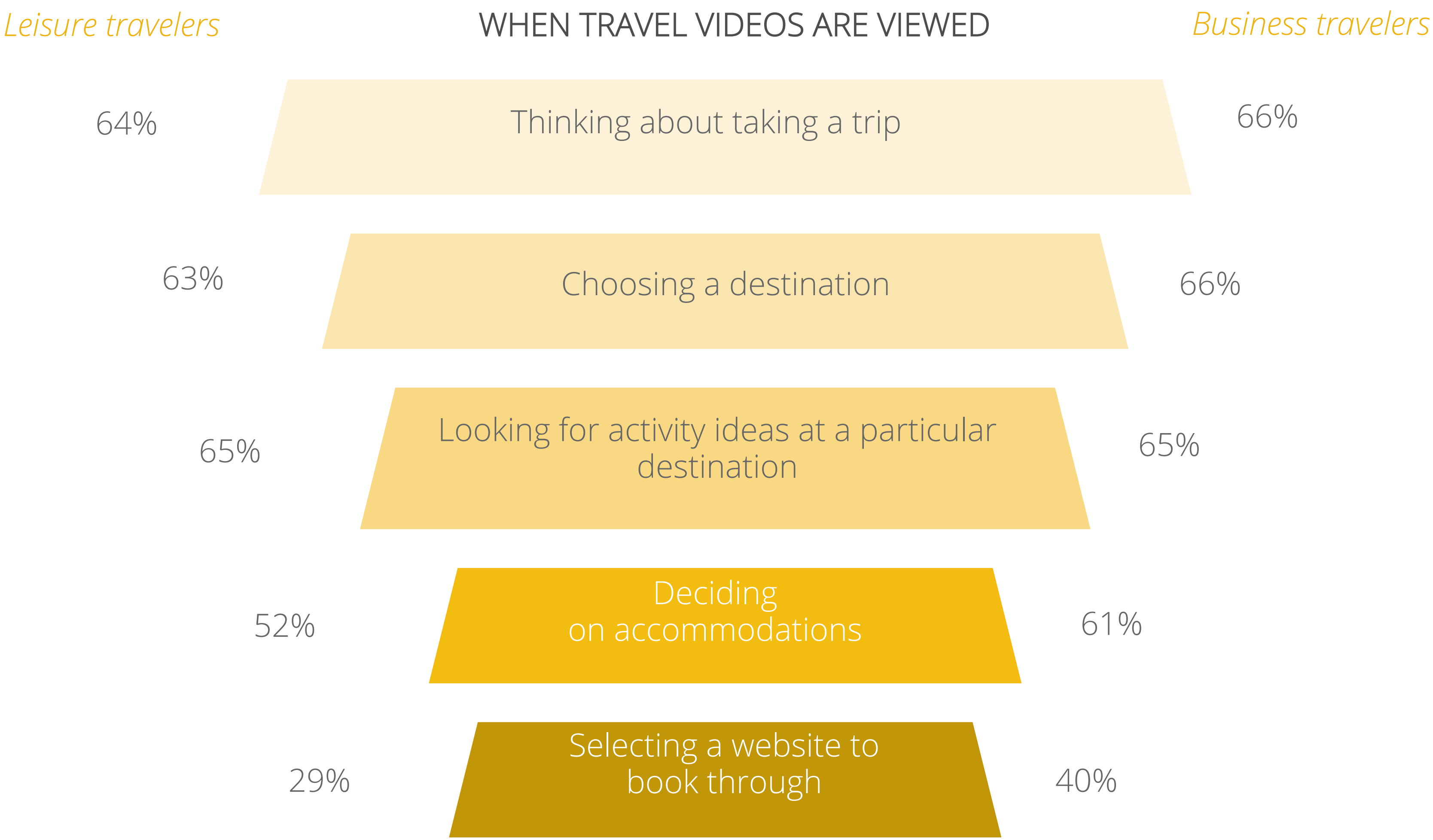
of business travelers **vs. 64% in 2012.**

55%

of affluent travelers **vs. 50% in 2012.**

Source: Ipsos MediaCT/Google Travel Study, Waves 4 and 5, April–May 2012 and May–June 2013.
Q1 (2011/2012 only): Typically, how often do you watch videos online? (Select ONE) / Q1/Q2 Base: Total Respondents / Q3: What types of videos have you ever watched on the Internet? (Select ALL that apply) / Q3 Base: Ever watch online videos

Online videos are key throughout the travel funnel



Source: Ipsos MediaCT/Google Travel Study, May–June 2013.
Q5: At what points in your travel planning process do you view videos online? (Select ALL that apply) / Base: Watched/commented on travel-related video. Leisure n = 1533, Business n = 931

Travelers engage with **all types** of travel videos

TYPES OF TRAVEL VIDEOS VIEWED

62%	Videos made by hotels, airlines, cruises, tours, etc.
59%	Trip reviews from experts
57%	Videos from travel-related channels
55%	Trip reviews from people like me
48%	Videos made by people like me
42%	Commercials/ads from companies/brands
37%	Videos by friends and family

Source: Ipsos MediaCT/Google Travel Study, May–June 2013.
Q6B: Specifically, what types of travel-related videos do you watch online? (Select ALL that apply) / Base: Watched/commented on travel-related video, n = 2464

Travelers watch more than **travel videos**

TOP 10 TYPES OF VIDEOS WATCHED ONLINE
(AMONG LEISURE AND BUSINESS TRAVELERS)

63%
Movie clips and trailers

63%
Full-length TV shows

62%
Music

59%
News

58%
Humor

55%
Full-length movies

55%
Food

48%
Weather

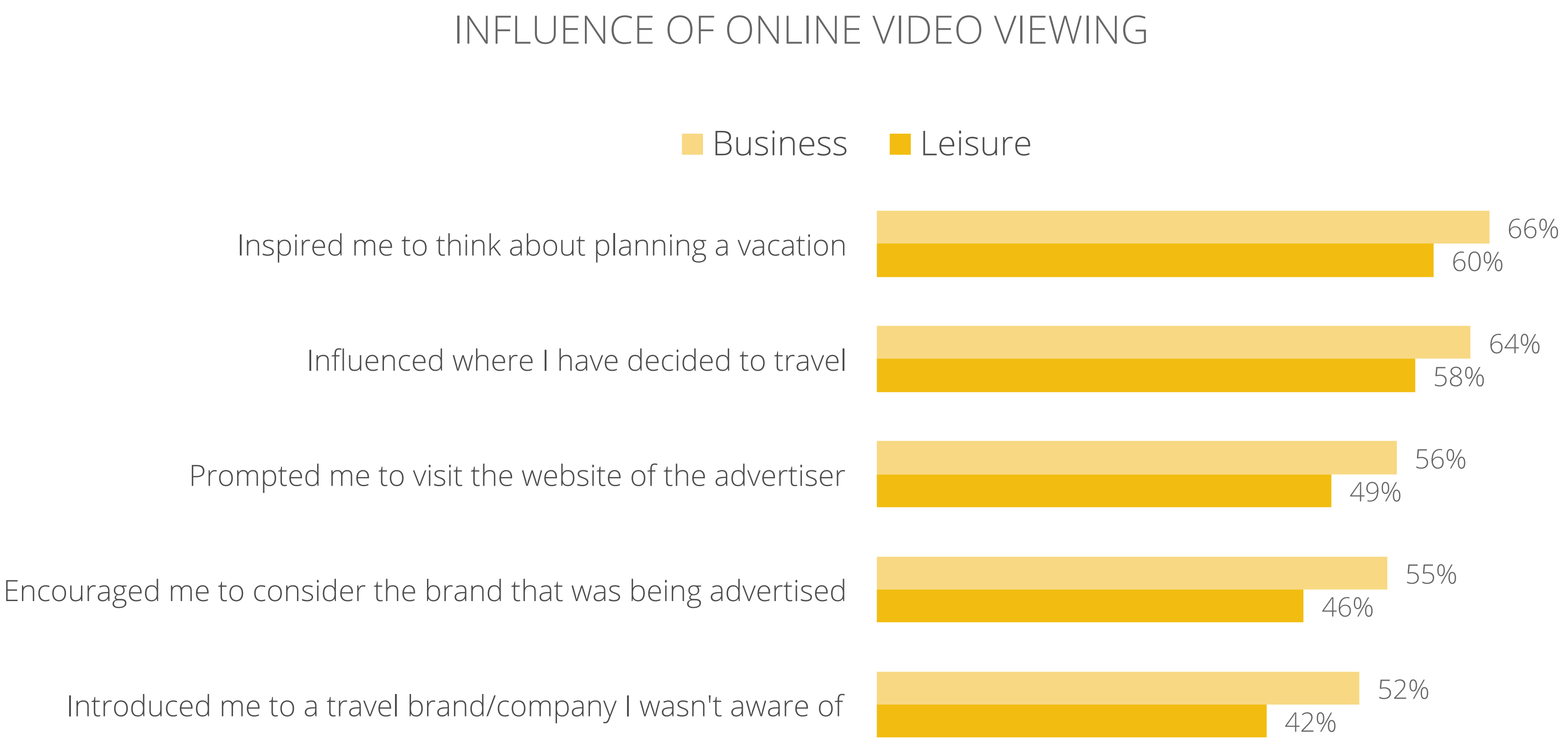
48%
Celebrity

45%
Sports

Tips for Marketers:
Think broadly about the types of content audiences engage with — not just travel videos. Be audience-driven and target travelers as they engage with all types of videos.

Source: Ipsos MediaCT/Google Travel Study, May–June 2013.
Q3: What types of videos have you ever watched on the Internet? (Select ALL that apply) /Base: Ever watch online videos (n = 4580)

Travel videos **influence** and prompt **action**



Source: Ipsos MediaCT/Google Travel Study, May–June 2013.
Q6C: Thinking about online videos, how would you say watching them has influenced the way you think about, plan, or book travel? (Select ALL that apply) / Base: Watched/commented on travel-related video; Leisure n = 1533; Business n = 931

Travelers not only consume online video content, they **create** it

TRAVELERS WHO ENJOY FILMING THEIR TRAVELS AND SHARING THEM WITH OTHERS

40%
Leisure travelers

48%
Business travelers

Source: Ipsos MediaCT/Google Travel Study, May–June 2013.
Q21: Here are some (more) 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. [IF BUSINESS TRAVELER: Please think of all types of travel, including personal or leisure (non-business related) or business trips.] (Select ONE for each statement) / Base: Total Respondents

WHAT THIS MEANS FOR MARKETERS

The Traveler’s Mindset: Travelers Seek Value and Increasingly Comparison Shop
Think about how your brand can stay top of mind with travelers from the initial inspiration phase down to consideration and booking.

Inspiration: A Fresh Opportunity to Reach Travelers Online
Develop stronger digital strategies to reach consumers early and inspire new travel before the consideration phase. Search is a key resource for travelers, making it an essential channel for marketers as well.

Multi-screen World: Research Activities Are Done Across Devices
Connect with travelers across devices. A booking on one device can directly or indirectly result from a previous research or activity on another device.

Online Video: A Traveler's Constant Companion
Develop and promote video content that allows you to bring the sights and sounds of your destination, property or product. Know how to leverage user-generated content to allow advocates to tell your story for you.

WHAT WE DID

Google commissioned Ipsos MediaCT, an independent marketing-research company, to conduct a travel tracking study to better understand the role of travel in the lives of U.S. consumers.

Respondents completed a 20-minute attitude and usage survey on their travel habits. If they qualified, users were routed to one of five deep-dive sections: airline, cruise, lodgings, car rental and vacation packages. The total sample size was 5,000 participants (3,500 leisure and 1,500 business travelers). In addition, 1,500 affluent (with $250k+ household income) travelers were recruited.

Respondents had to be 21–54 years of age, reside in the U.S., go online at least once per month, and have traveled at least once for personal reasons (or a minimum of three times for business) within the past six months.

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

What role does the **internet** play in travel inspiration and planning?

How have **mobile devices** impacted our behavior?

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