



The 2012 Traveler

Google/Ipsos MediaCT
U.S.
August 2012

Research Study Methodology

- Google commissioned Ipsos MediaCT, an independent marketing research company, to conduct a travel study to better understand the role travel plays in the lives of U.S.
- Respondents completed a 21 minute attitude & usage survey into travel habits and attitudes. If qualified, respondents were routed to one of four deep dive sections: Airline, Cruise, Lodgings, and Car Rental.
- Interviews were conducted from 4/24/12 to 5/17/12 yielding a total sample of 5,000 consumers who have traveled at least once for leisure reasons (or a minimum of 3 times for business purposes) in the past six months.
- An augment of 1,500 affluent leisure travelers and 1,000 cruisers were also recruited

TRAVELER TYPES DEFINED



Leisure Traveler

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



Business Traveler

has taken at least three trips for business in the past 6 months



Affluent Traveler

has taken at least one trip for leisure in the past 6 months and has a household income of \$250K+

Agenda and Key Findings

1 What Travelers Value

2 Internet and Search

3 Mobile

4 Online Video

5 Loyalty

6 Destinations

What Travelers Value

1

Leisure Travelers Increasingly Seek Travel Value

66%

I plan to spend more time shopping around/researching before booking travel because finding value for my money is important to me

vs. 59% in 2011



64%

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

vs. 55% in 2011

57%

It is important to me that I recognize a brand I am considering booking travel with

Convenience Matters Most to Business Travelers

Top 4 Features Rated “Extremely/Very Important” by Business Travelers

Air Travel

89%	Most Convenient Departures/ Arrival Times
84%	Past Experience with Airline
83%	Price
82%	Fewer Stops/Better Connections

Lodging

81%	Price
80%	Most Convenient Location
75%	Past Experience with Lodging Establishment
67%	In-Room Services Offered

Car Rental

81%	Price
80%	Past Experience with Car Rental Agency
61%	Promotions
58%	Cancellation Policy/Ability to Change Bookings

Internet & Search

2

Surprise! Travelers use the Internet

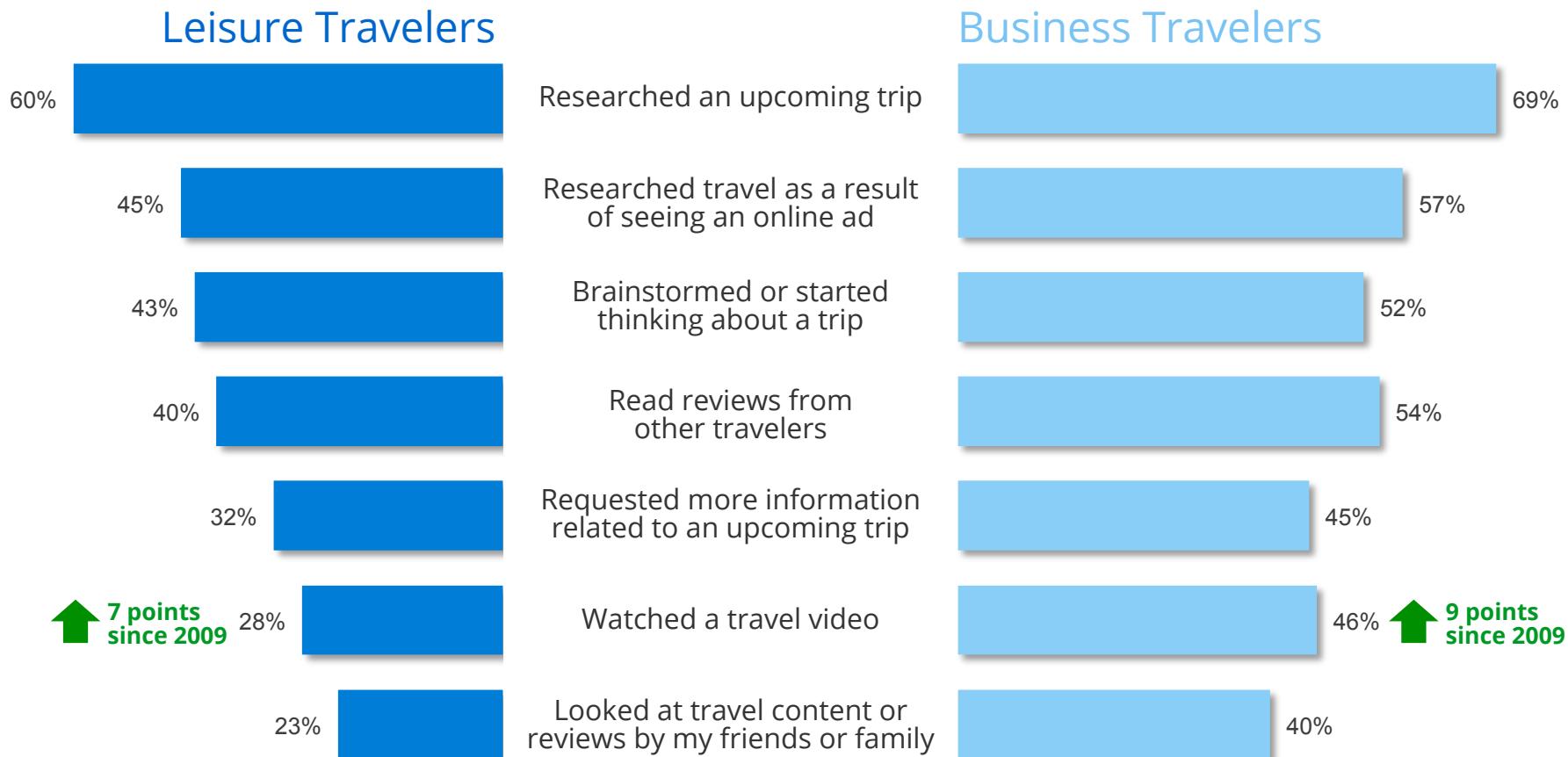
83% of leisure travelers and

76% of business travelers plan online

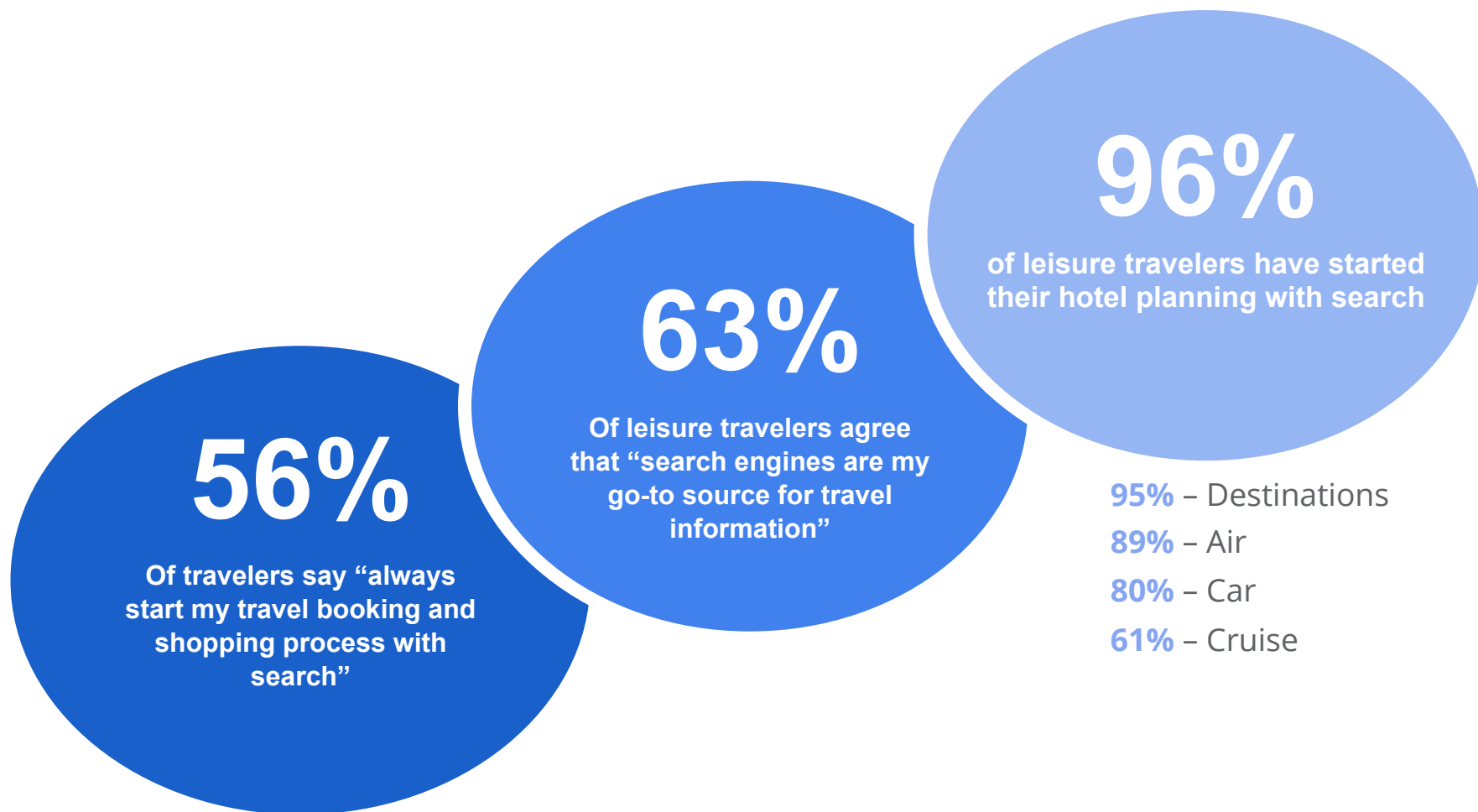


Travelers Research Travel Online in Many Ways

The Top Seven Online Travel Planning Activities

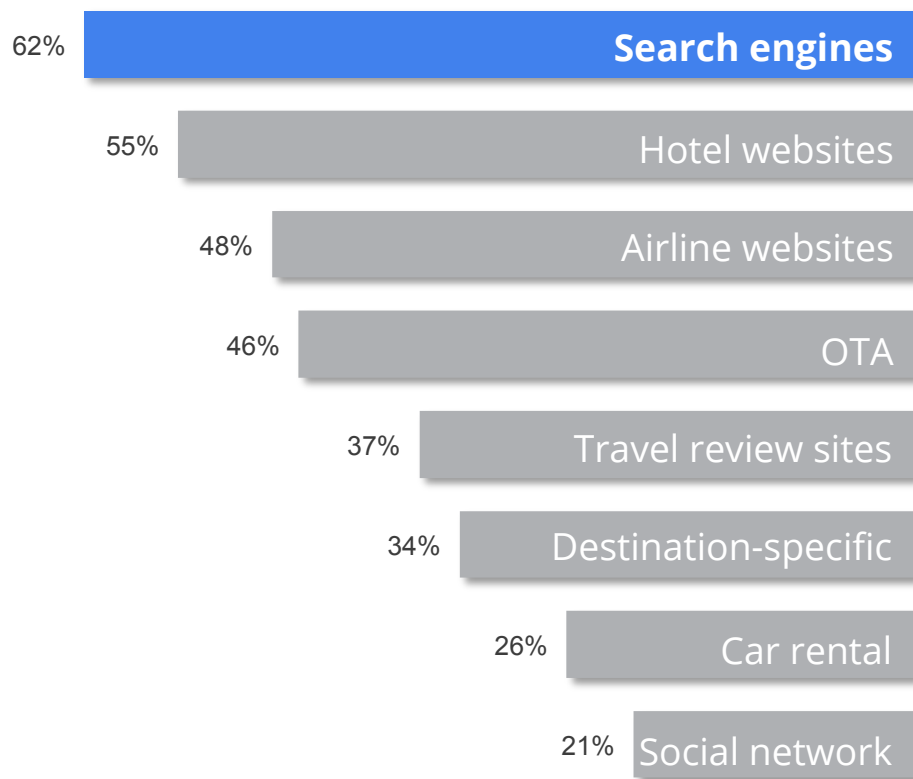


And When They Are Online, Travelers Search

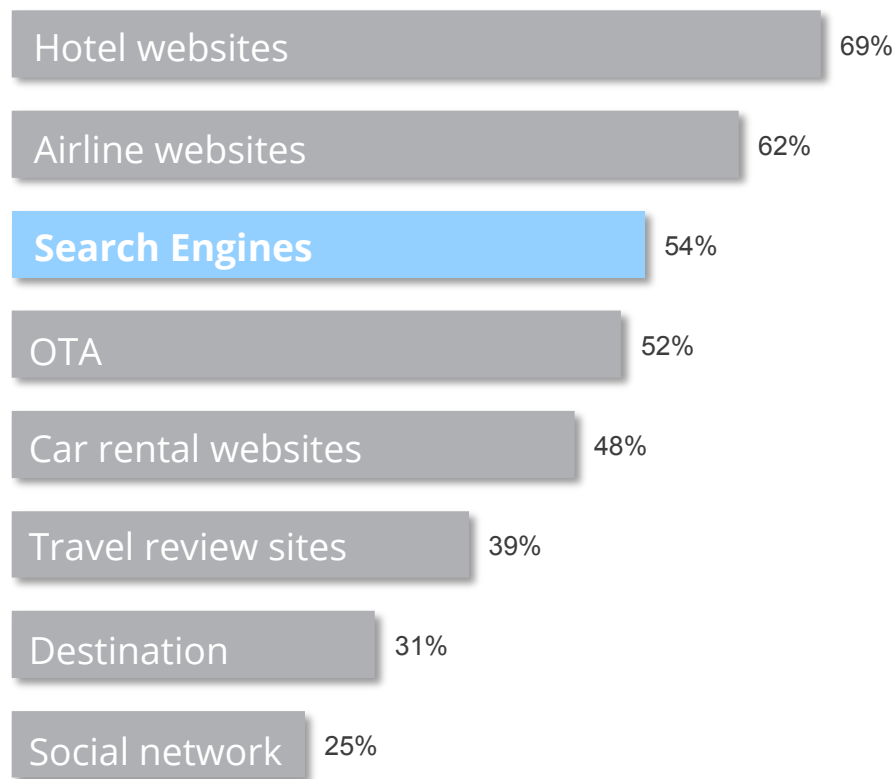


Leisure and business travelers prioritize search differently

Leisure Travelers



Business Travelers





Poll: Which week from September 1st through December 31st, 2012 will see the most travel searches by US users on Google?

a) September 16th – 22nd

Peak week for hotel and car rental searches

b) November 4th – 10th

Peak week for cruise searches

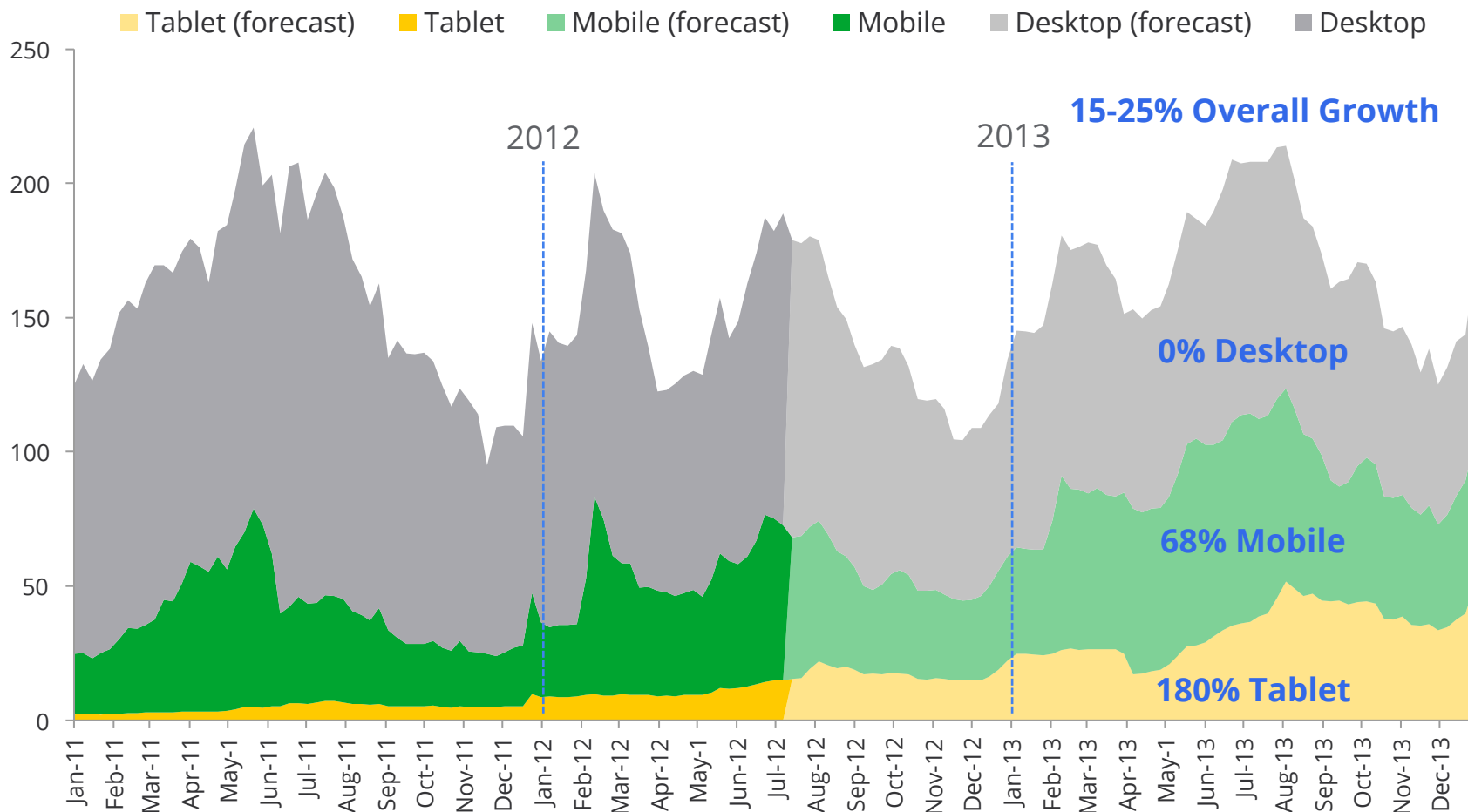
c) November 11th – 17th

Peak week for air travel searches

d) December 9th – 15th

Query Growth Driven by Mobile and Tablet

Indexed Travel Query Volume on Google by Week



Mobile

3



Poll: How many Android devices are newly activated every day?

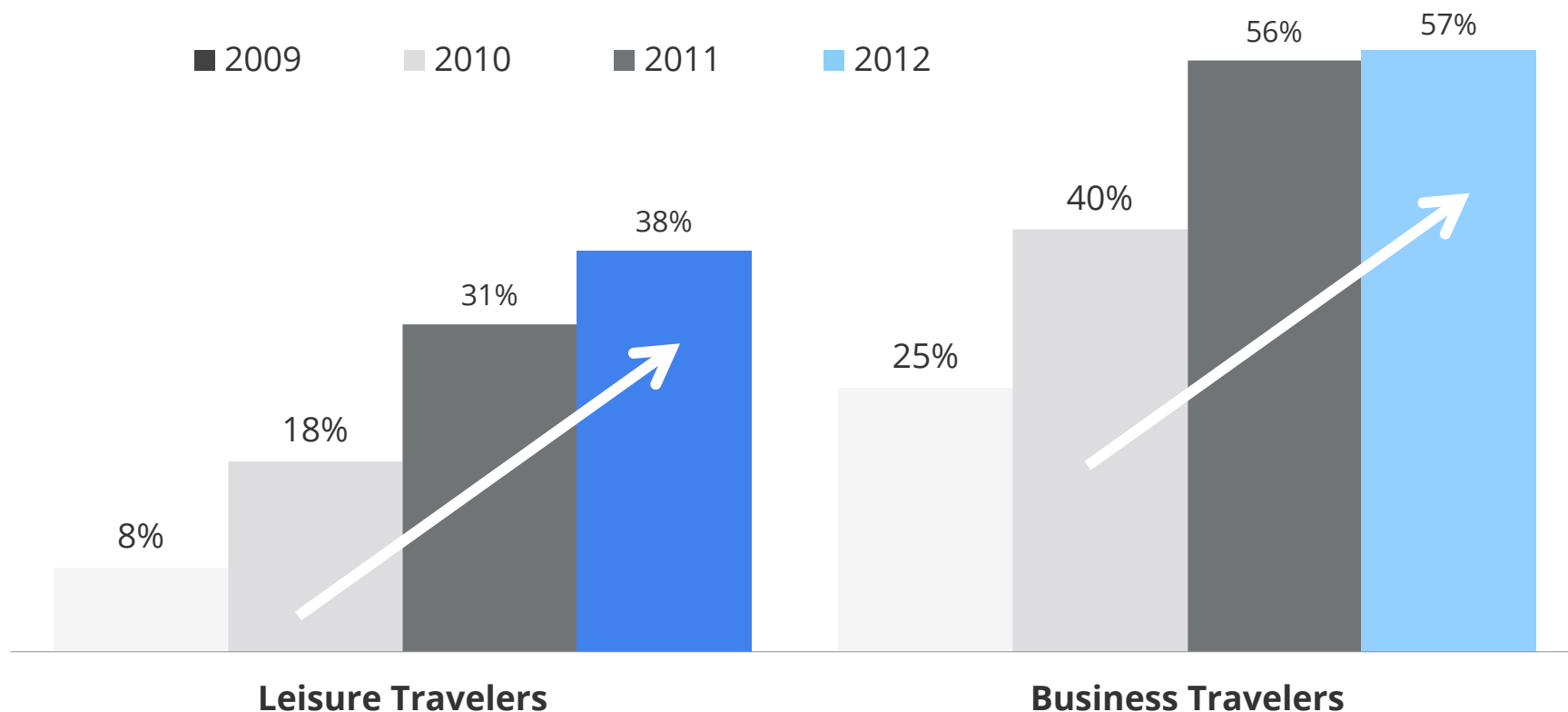
- a) 200,000
- b) 400,000
- c) 750,000

d) 1,000,000

The IDC predicts Android will be on 61% of smartphones in the US by the end of this year.

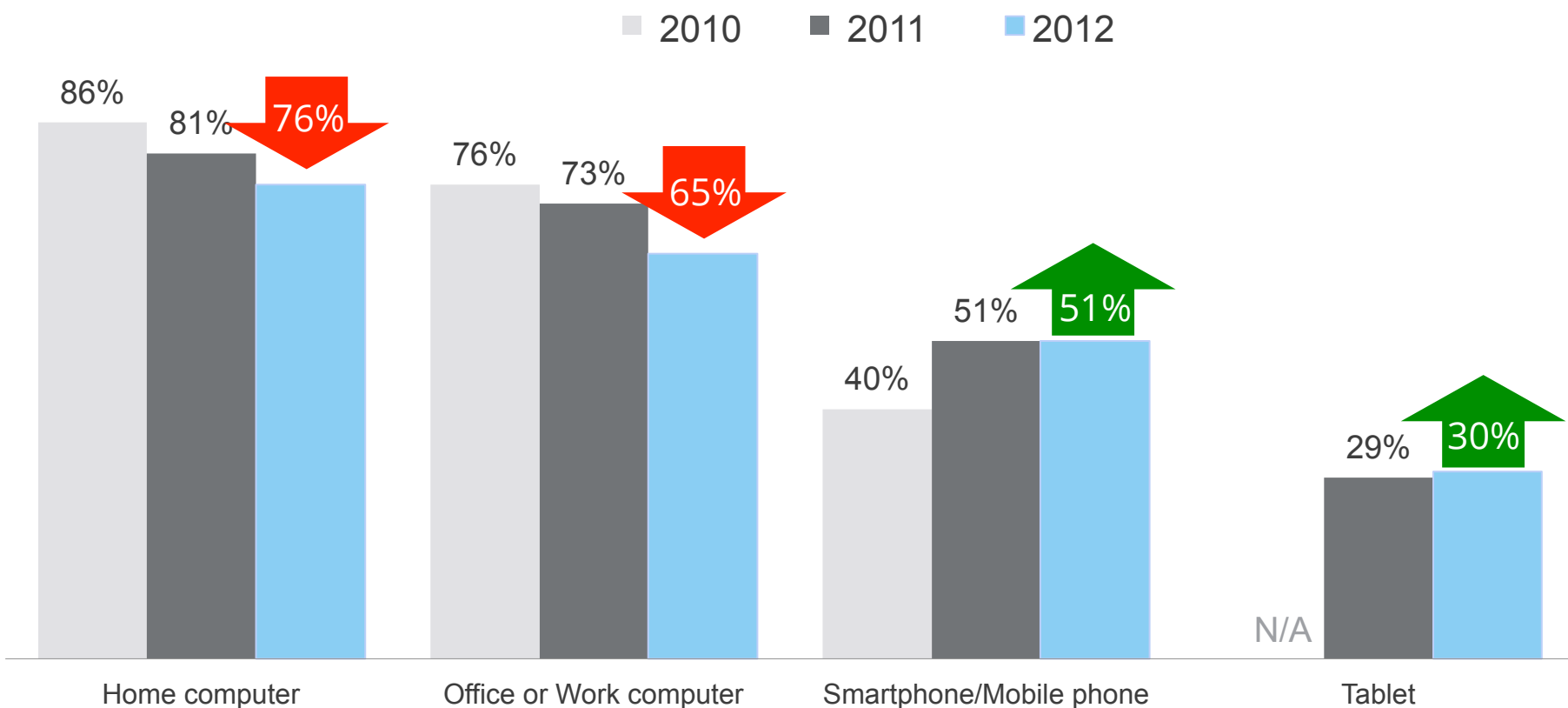
More Travelers Use Mobile for Travel Information

Percentage of Travelers Who Use a Mobile Device to Access Internet for Travel Information



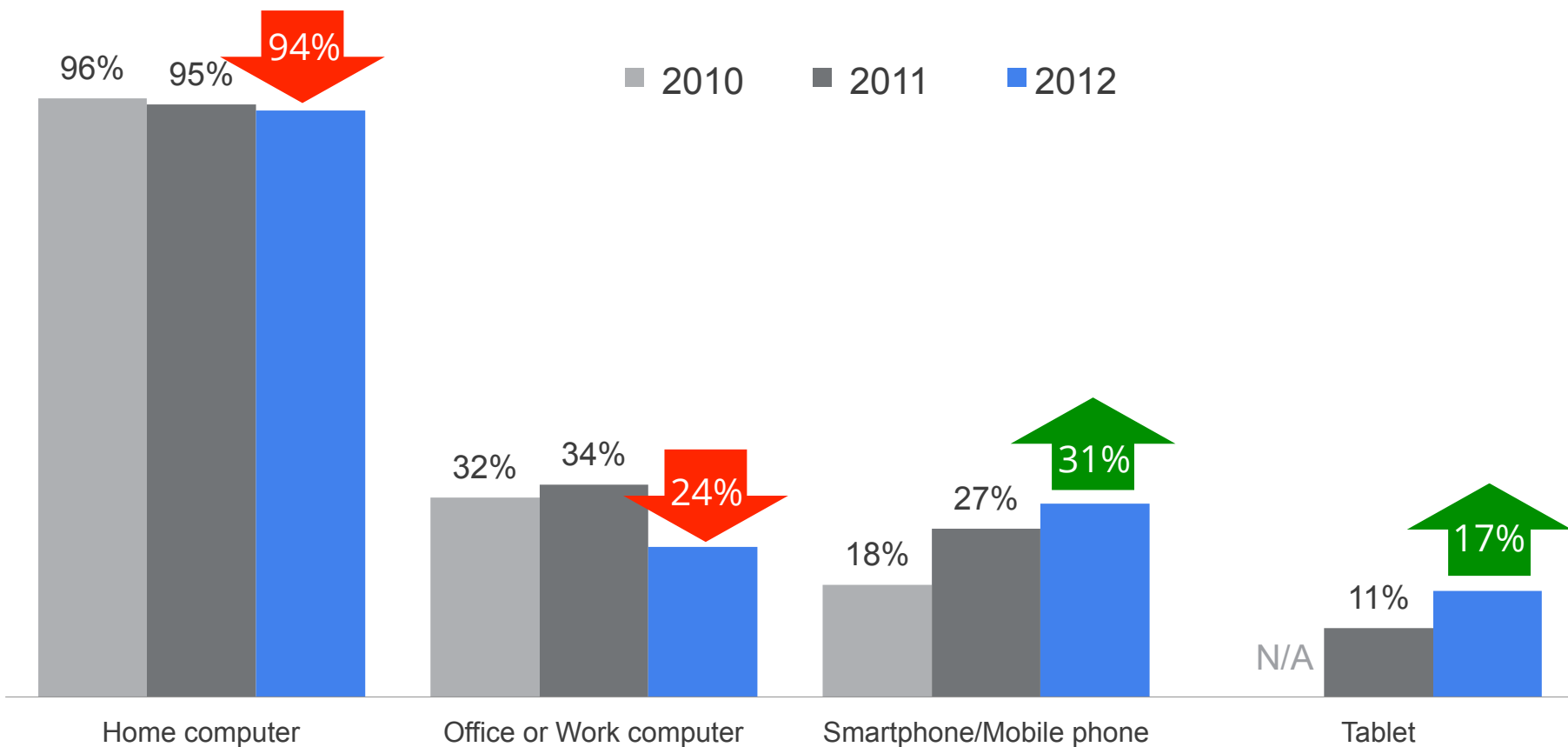
... While fewer business travelers use computers

Where business travelers access travel information



...And Fewer Leisure Travelers Use Computers

Where Leisure Travelers Access Travel Information



Source: *The Traveler's Road to Decision*, Google and Ipsos MediaCT. July 2012.

(Q9) From which of the following do you access the Internet for travel-related information when planning your Leisure/business trips? Q9 Base: Use Internet To Plan Trip 2010 (n=827) 2011 (n=1442) 2012 (n=1485).

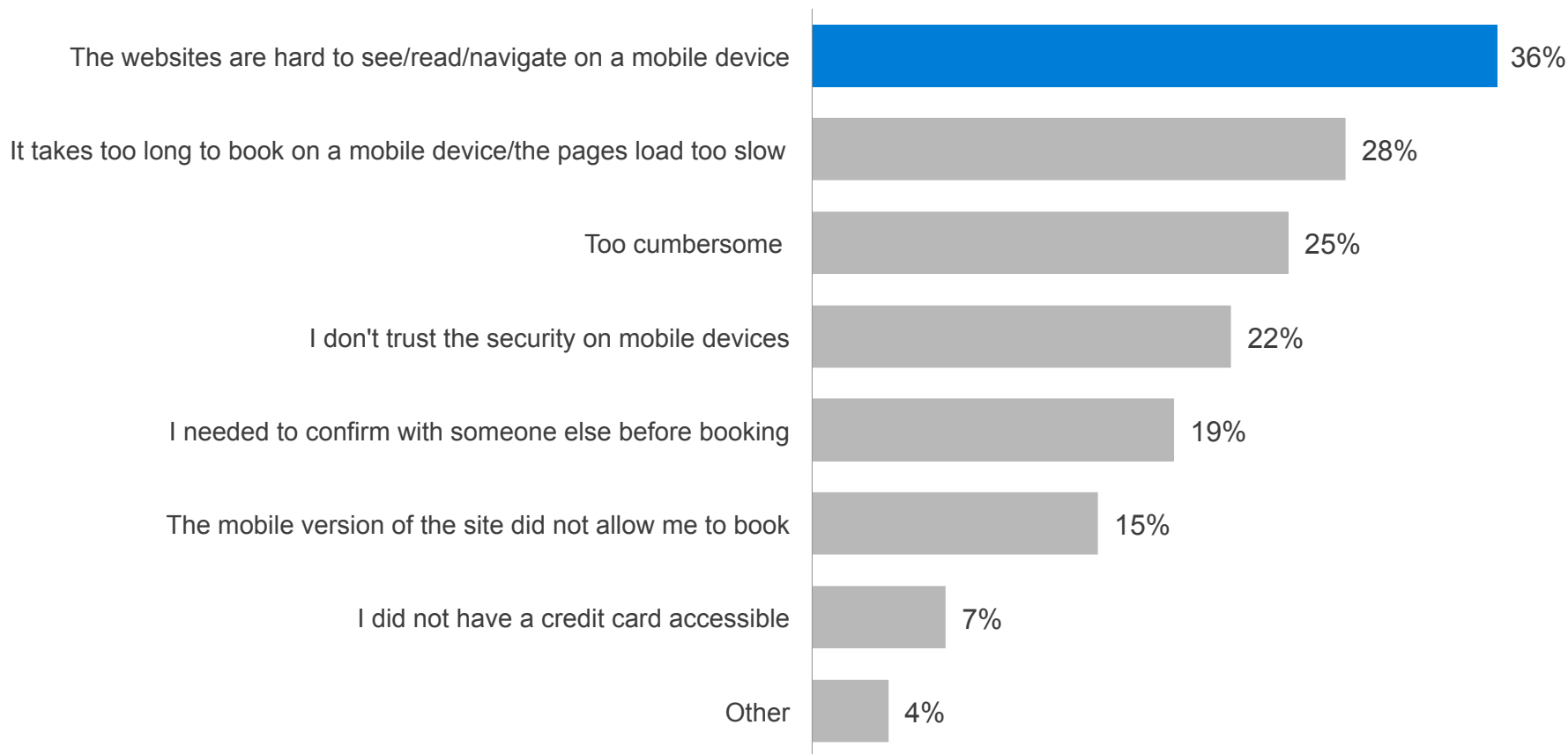
When booking travel on a mobile device, travelers tend to book via mobile browser

How travelers use mobile to book travel

	Using apps		Using mobile browser	
	Leisure (377)	Business (354)	Leisure (377)	Business (354)
Overnight accommodations	12%	17%	40%	36%
Air travel	10%	17%	38%	35%
Car rental	7%	14%	33%	33%
Travel packages	6%	10%	27%	26%
Destinations	5%	7%	13%	21%
Vacation activities	5%	10%	23%	26%
Cruises	3%	7%	15%	17%

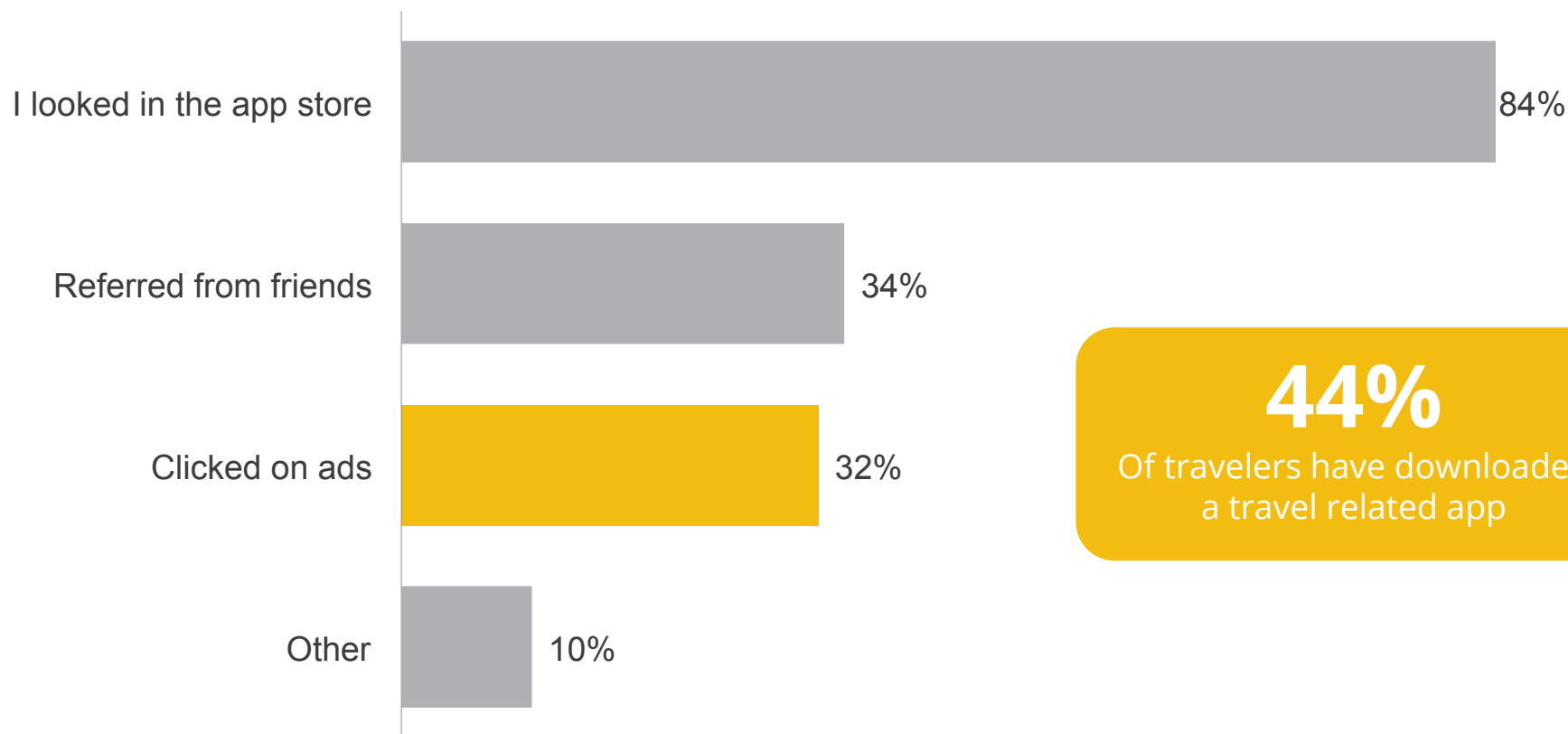
A Bad Mobile Website is the #1 Deterrent to Booking Travel on a Phone

Reasons for Not Booking Travel on a Mobile Device



32% of Travel Apps are Downloaded from Clicks on Ads

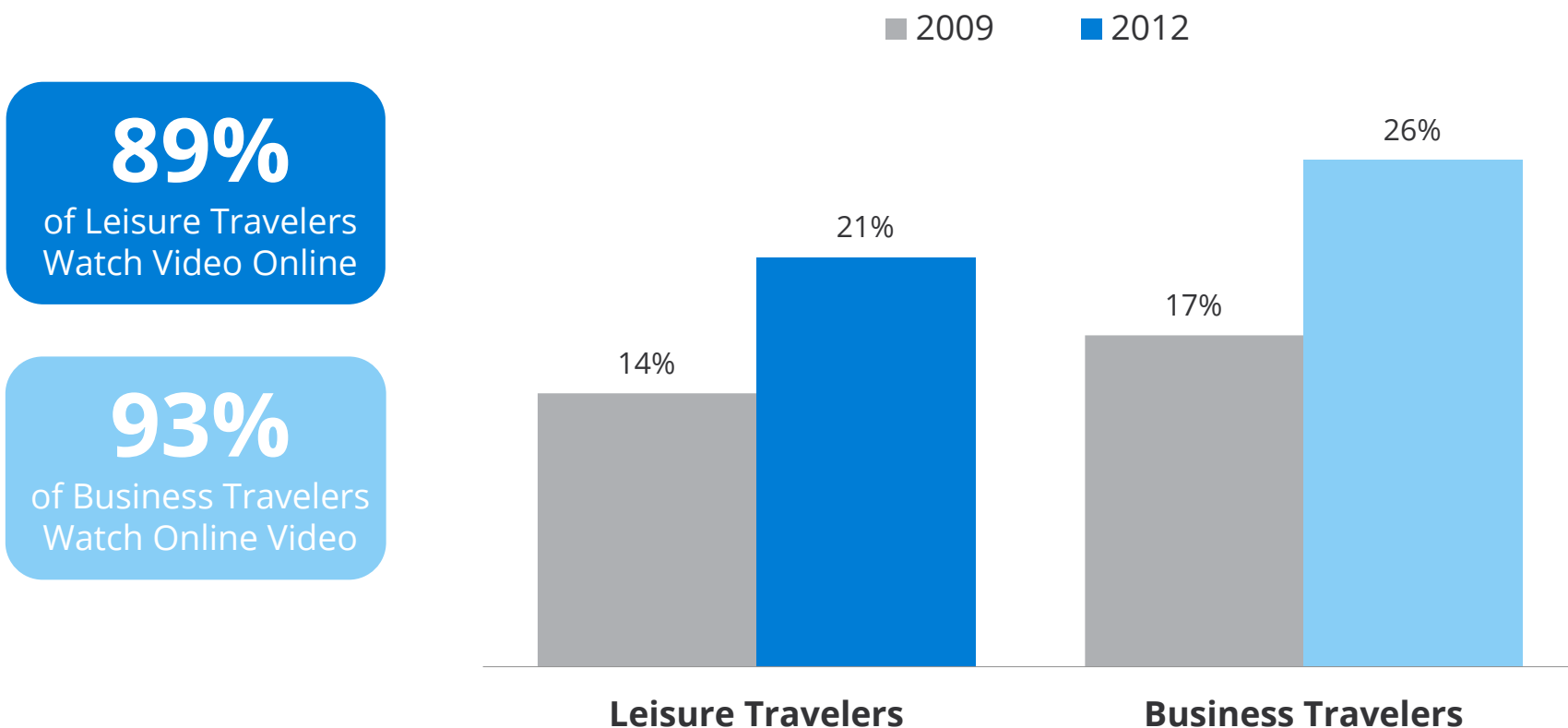
Where Travel-Related Apps Are Downloaded



Online Video 4

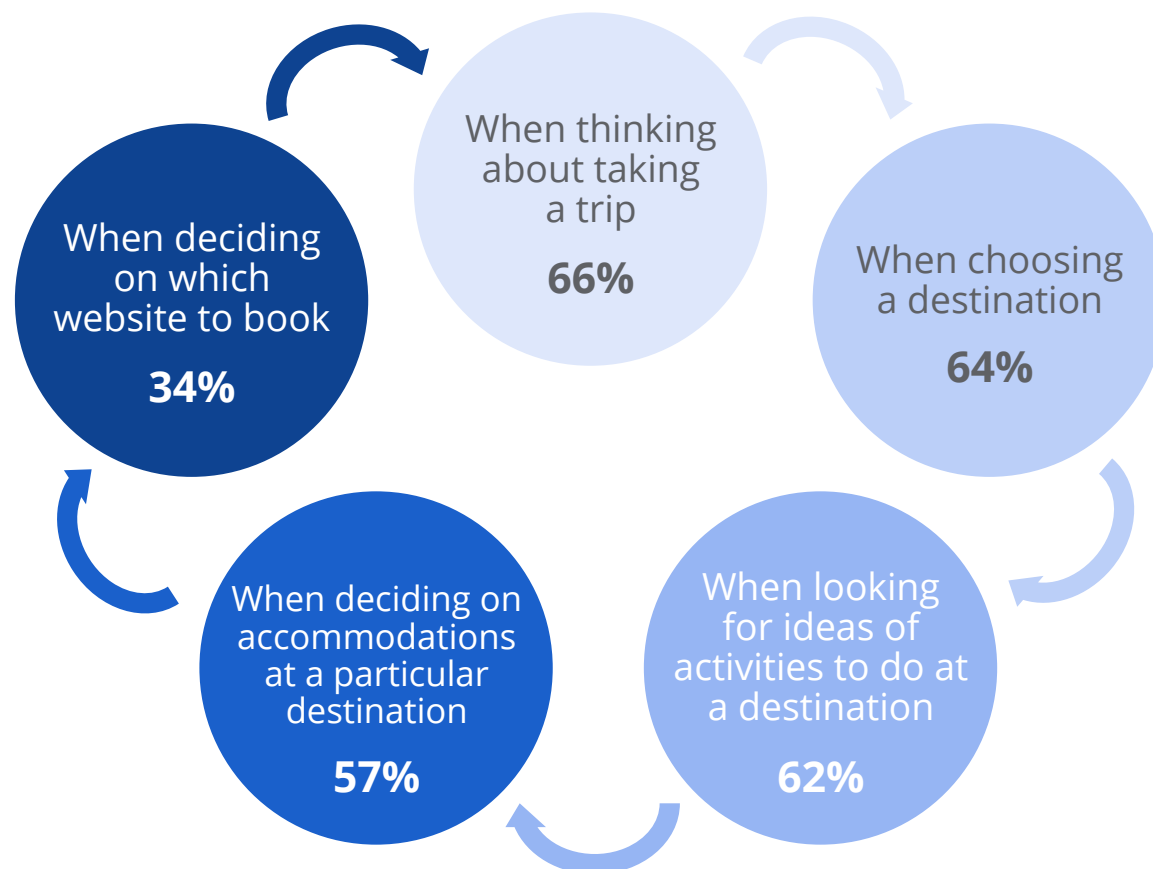
Online Video as a Resource for Planning Travel Has Grown Over Time

Percentage of Travelers Who Use Online Video for Travel Planning



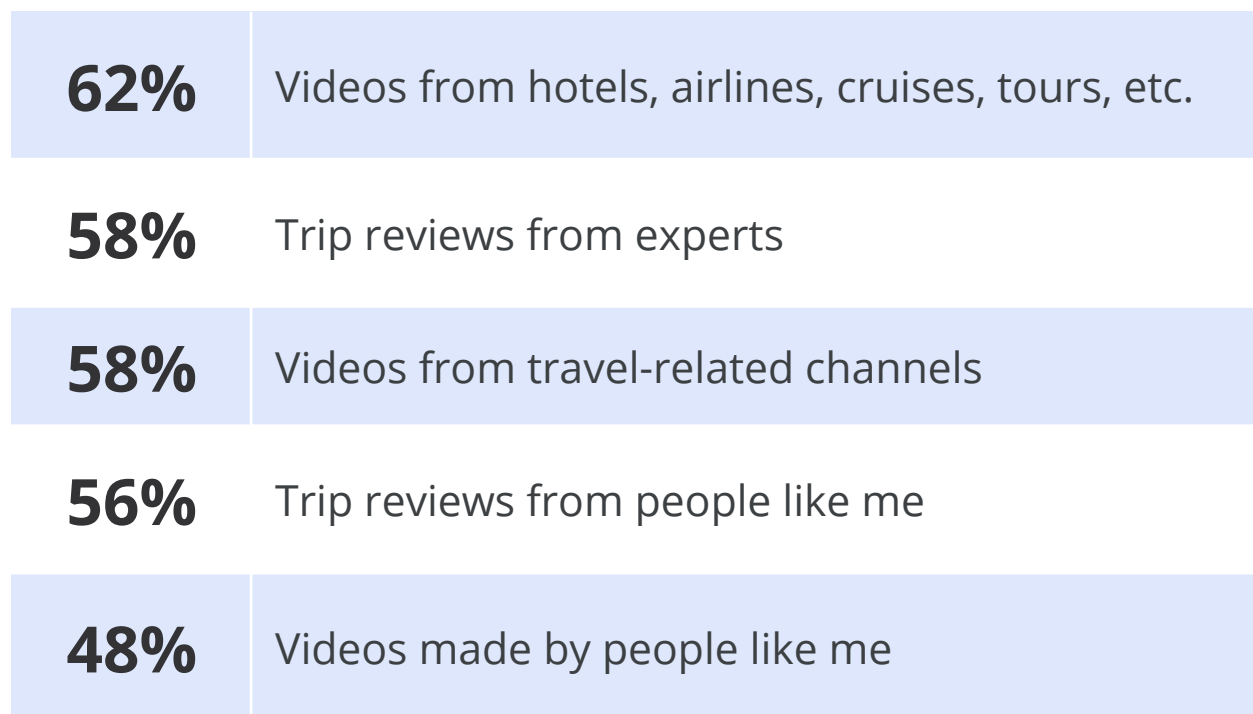
Travelers Watch Online Video In All Phases of Travel Planning

When Video-Viewing Travelers Watch Travel Videos



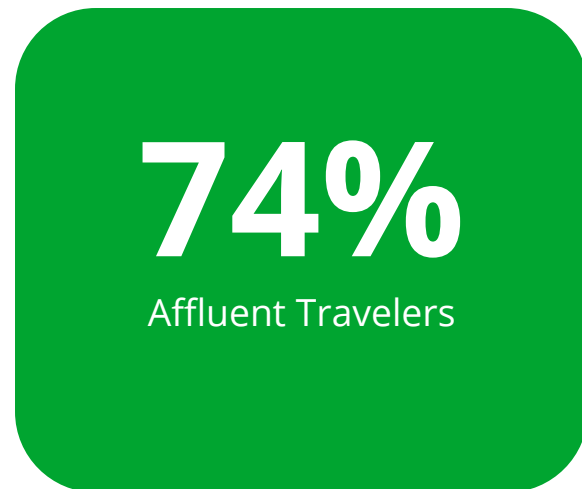
Travelers Watch a Mix of User-Generated Content and Professionally-Made Videos

Top 5 Types of Travel Videos Watched by All Travelers



Online Video Sites Prompt Travelers to Book

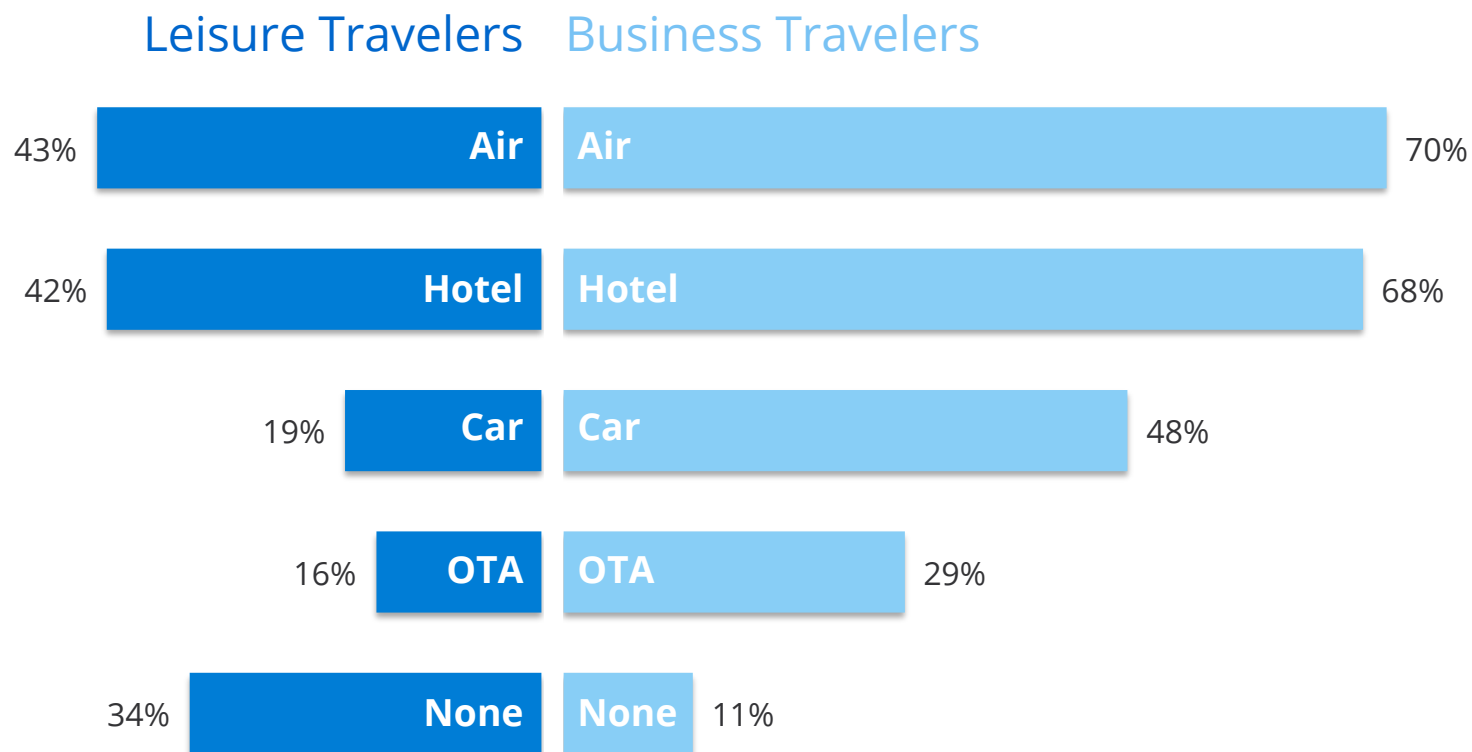
Of Travelers Who Watched Online Video While Planning Travel, the Percentage Who Say They Were Prompted to Book as a Result



Loyalty 5

Many Travelers Are Enrolled in Loyalty Programs

Percentage of Travelers Who Belong to Travel Loyalty Programs



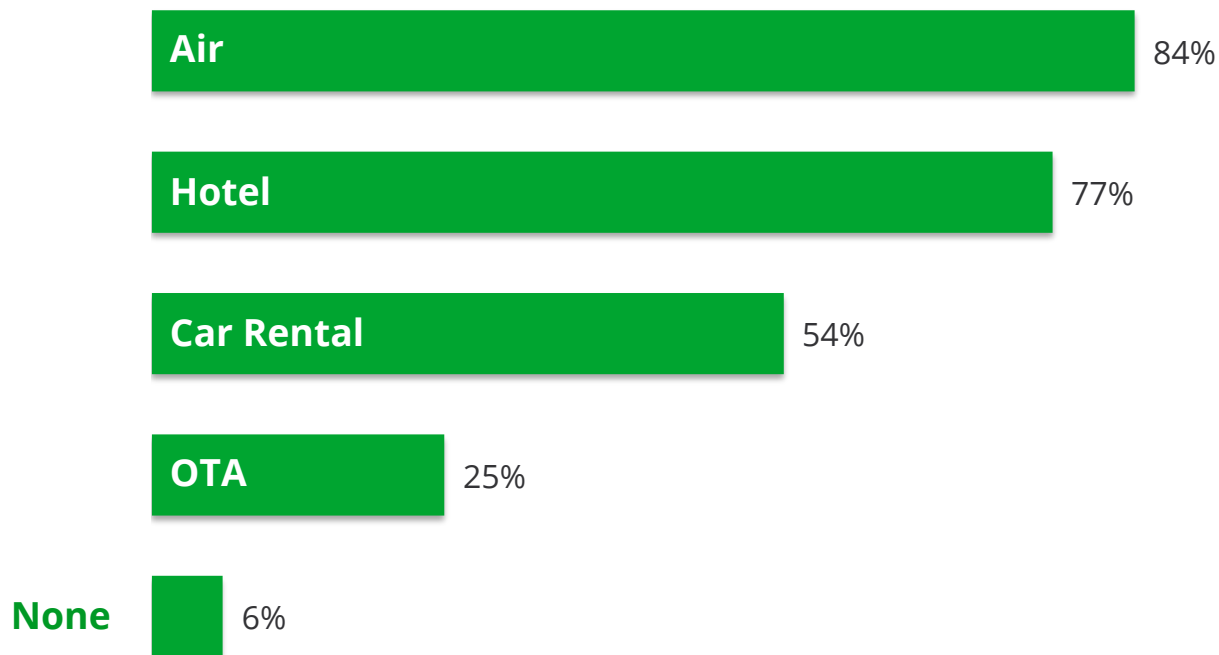
Source: *The Traveler's Road to Decision*, Google and Ipsos MediaCT. July 2012.

(C1) Which, if any, of the following travel-related loyalty/rewards program do you belong to? Base: Belong to a rewards program: Business (n = floating 194 - 1,051) and leisure (n = floating 339 - 1,518) travelers.

Many Travelers Are Enrolled in Loyalty Programs

Percentage of Travelers Who Belong to Travel Loyalty Programs

Affluent Travelers



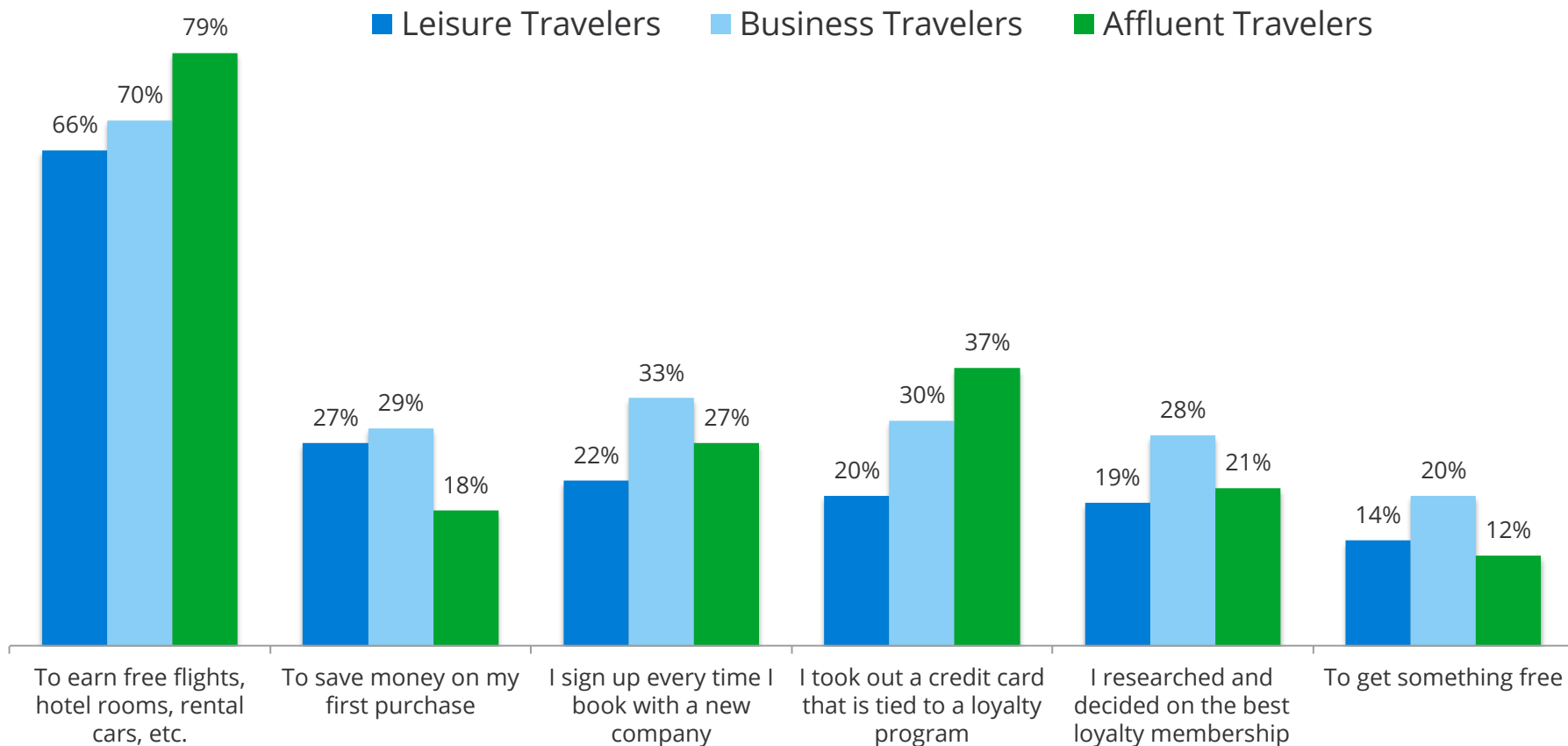
Travelers are Members of More Loyalty Programs than They Actually Use

Average Number of Travel Loyalty Programs to Which Travelers Belong and Use at Least Once Per Year

	Loyalty Memberships Held – Leisure	Loyalty Memberships Used – Leisure	Loyalty Memberships Held – Business	Loyalty Memberships Used – Business
Air	2.9	1.9	4.0	2.5
Hotel	2.6	1.9	4.1	2.8
Car Rental	2.5	1.8	3.2	2.3
OTA	2.5	1.9	4.1	3.2

Freebies Entice Travelers to Join Loyalty Programs

Reasons for Joining Travel Loyalty Programs



Loyalty Program Members Download Mobile Apps

Percentage of Travelers Who Have Downloaded a Mobile Application from a Company With Which They are Loyal

54%

Leisure Travelers

vs. 27% total leisure travelers

72%

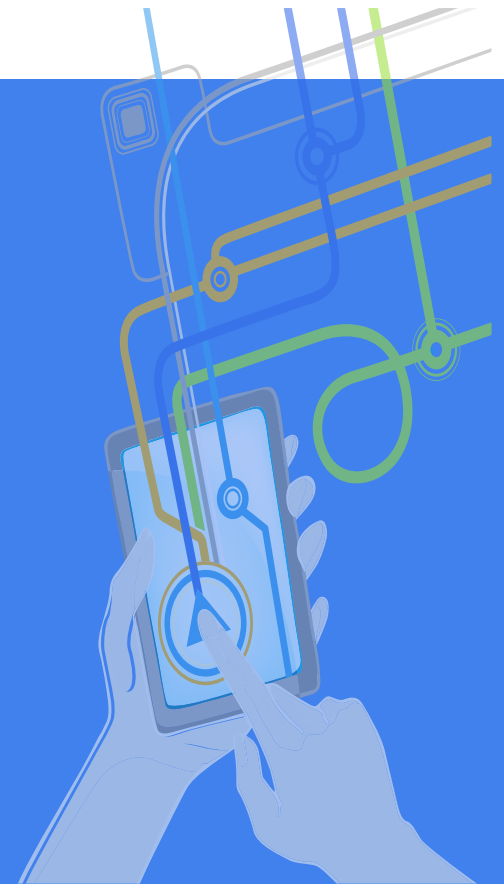
Business Travelers

vs. 41% total business travelers

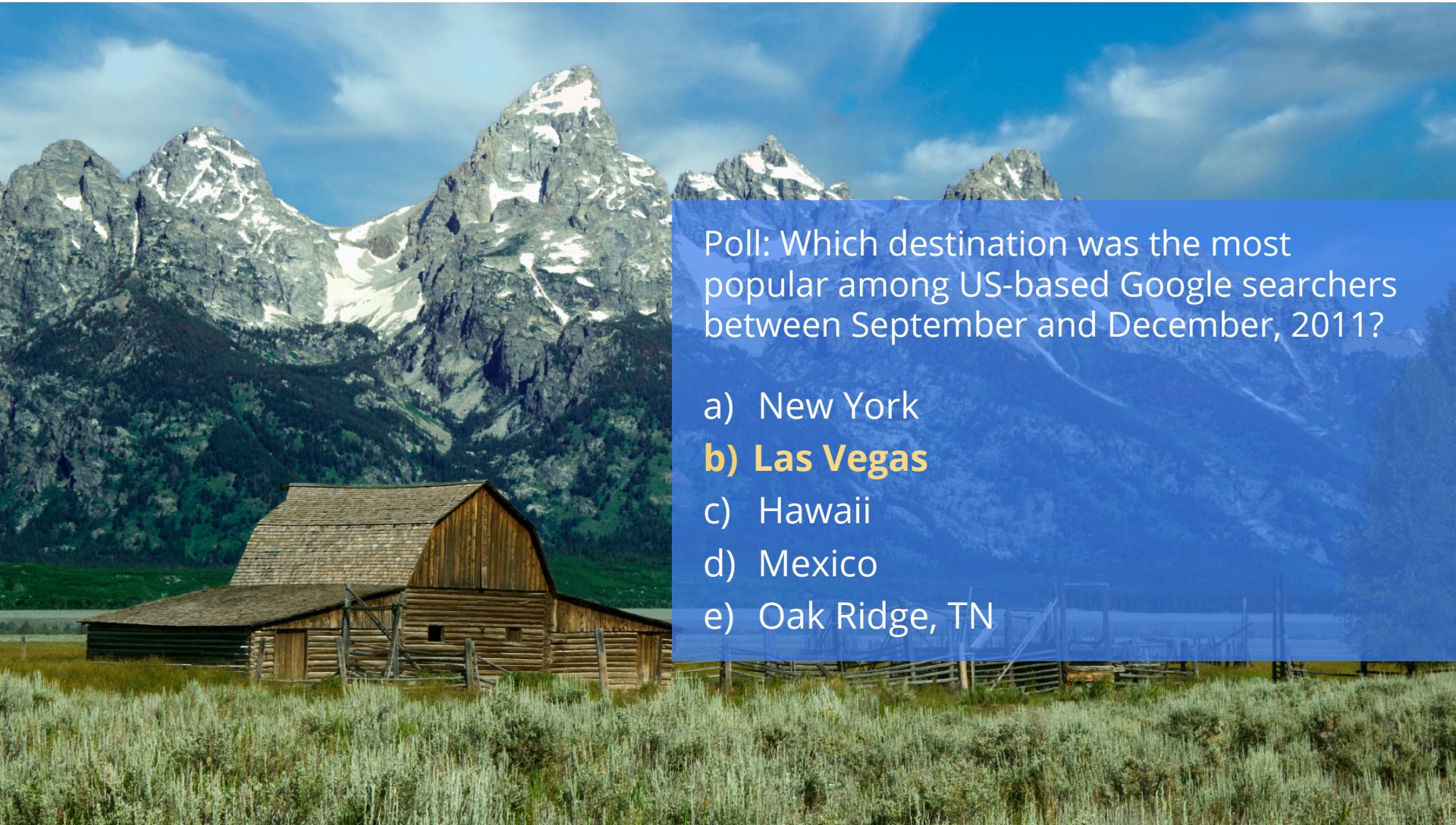
71%

Affluent Travelers

vs. 44% total affluent travelers



Destinations 6

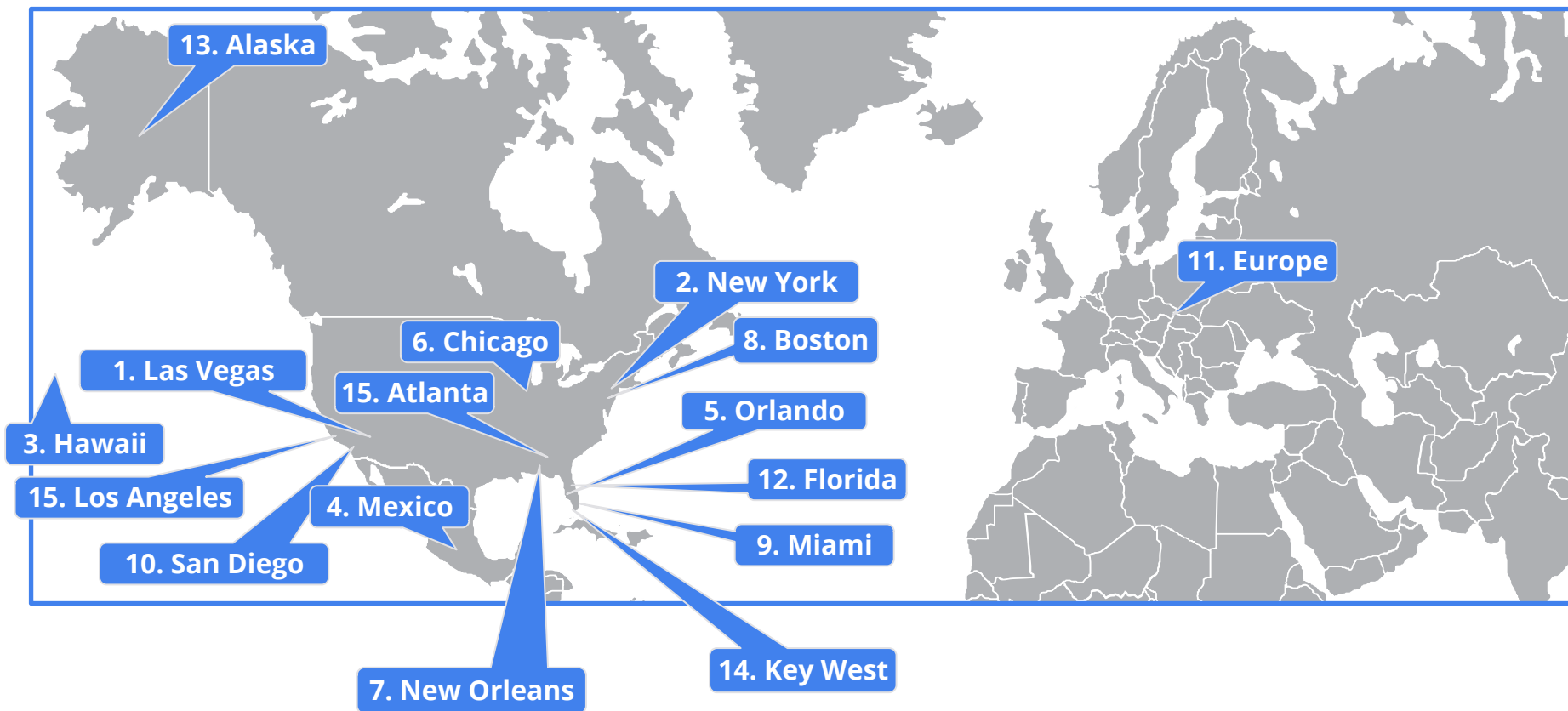


Poll: Which destination was the most popular among US-based Google searchers between September and December, 2011?

- a) New York
- b) Las Vegas**
- c) Hawaii
- d) Mexico
- e) Oak Ridge, TN

Top Destinations, September – December, 2011

Top travel destination keyword searches by people in the US for all devices on Google



Travelers are undecided when they begin the online process

More than ½ of travelers brainstormed or
started thinking about a trip online

65% of leisure and 70% of affluent travelers begin researching online
before they've decided where or how to travel

Wrap Up

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Key Findings

1 **What Travelers Value**

Travelers seek value from trusted brands. Business travelers seek convenience.

2 **Internet and Search**

Leisure travelers turn to search engines to plan travel online; business travelers rely more heavily on supplier sites.

3 **Mobile**

Travelers increasingly turn to mobile devices to plan and book travel.

4 **Online Video**

Travelers watch a mix of user generated videos and professionally made videos at all stages of travel planning.

5 **Loyalty**

Business travelers are enrolled in more loyalty programs than leisure travelers. Neither group uses all of the programs in which they are enrolled.

6 **Destinations**

Most leisure travelers and 70% of affluent travelers begin researching travel online, without a specific destination or mode of travel in mind.