TRAVEL CONTENT JOURNEY

Expedia MediaSolutions | comScore

METHODOLOGY OVERVIEW

Custom travel survey

- Respondents reported on travel motivations, research, and buying behavior
- Age 18+; live in the US; own a smartphone, tablet or desktop/laptop; booked travel within the past 6 months; (n=1058)
- Fielded from August 16 to August 21, 2013

Custom behavioral analysis leveraging the comScore Panel

- Audience defined as those making online travel purchases during March – May 2013
- We tracked these buyers' behavior in the 12 weeks before purchase
- Activities measured included online travel browsing travel-related web and image search, and exposure to travel brand content on Facebook

Syndicated resources: Media Metrix, Media Metrix Multi-Platform, Ad Metrix, Plan Metrix

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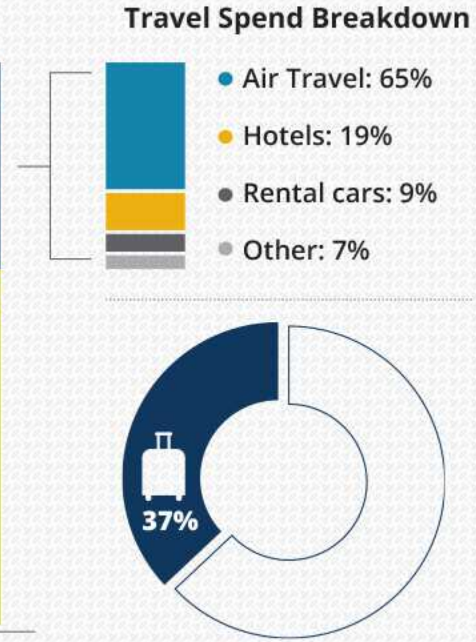
FIRST HALF US E-COMMERCE SPENDING (BILLIONS)

US Online **travel spending** was **$58 Billion** through the first half of 2013, **up 8 % year-over-year**.



Travel accounted for **37% of total e-commerce spending** in H1 2013.

Source: comScore Plan Metrix, August 2013, comScore E-Commerce Data, August 2013

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TRAVEL BRANDS INVESTMENTS IN TRADITIONAL DIGITAL ADVERTISING IS RISING WITH GREATER EFFICIENCY.

	Impressions (Billions)	Ad Spend	Average CPM
Total Internet	8%	8%	15%
Total Travel	19%	9%	71%

In the first 6 months of 2013, there were fewer **ad impressions** served, but total **investment** is on the rise.

Source: comScore Ad Metrix

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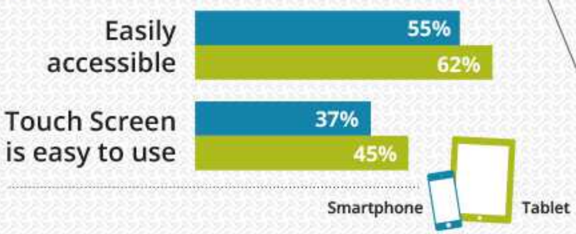
TOTAL TRAVEL MINUTES ARE INCREASING ACROSS DEVICES

Top Device Use Reasons



Total **PC travel minutes** have increased

+2% YoY

Accessibility
+
Ease of use
=
Mobile engagement

+45% YoY **increase** in total **mobile travel minutes**

+52% of the internet population engaging with **travel content** access it via a **mobile device**

+28% of total **travel minutes** are consumed on **mobile device**

+24% access travel content **exclusively** on their smartphone and/or tablet

Source: comScore Media Metrix and Media Metrix Multiplatform, comScore Ad Metrix | comScore Mobile Travel Trends Study (2012)Why did you choose your smartphone/tablet to help you plan your travel? Base: Smartphone/tablet travel planners

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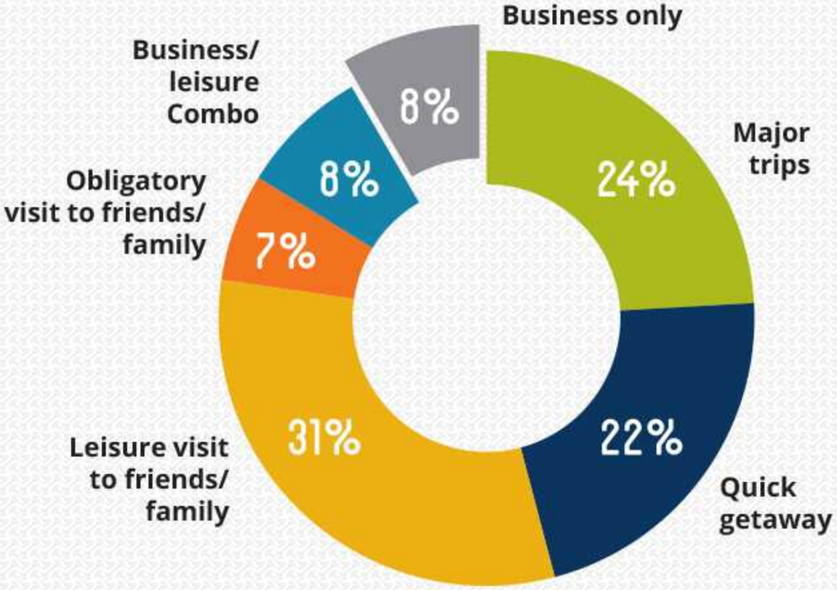
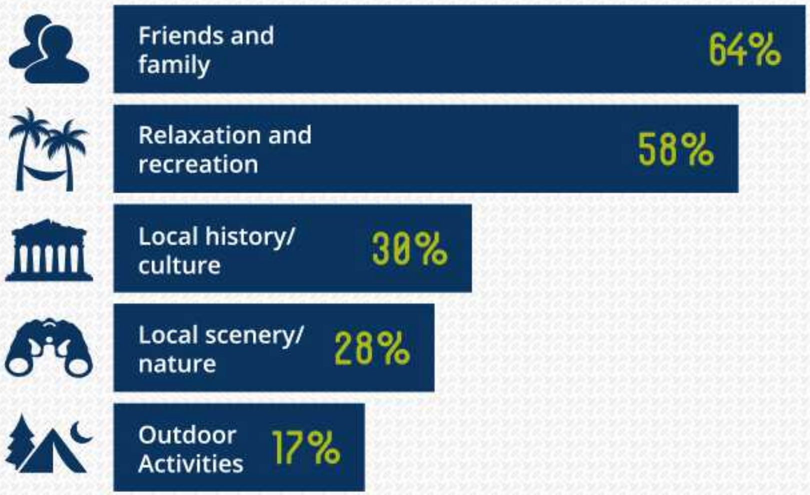
9 IN 10 TRIPS BOOKED IN THE LAST SIX MONTHS HAD A LEISURE COMPONENT.

Type of trip booked



Reason for Booking Trip
(w/ a Leisure Component)



BOOKTYPE. Thinking about the most recent trip where you booked air travel and/or a hotel stay, which of the following best describes the type of trip you booked? Base: Total respondents
BOOKREASON. <<Which of the following best describes your reason(s) for booking this trip?>> OR << What made you choose to add the leisure part of this trip?>> Base: Respondents with leisure aspect to trip

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HOW TRAVELERS SEEK TRAVEL INFORMATION ONLINE

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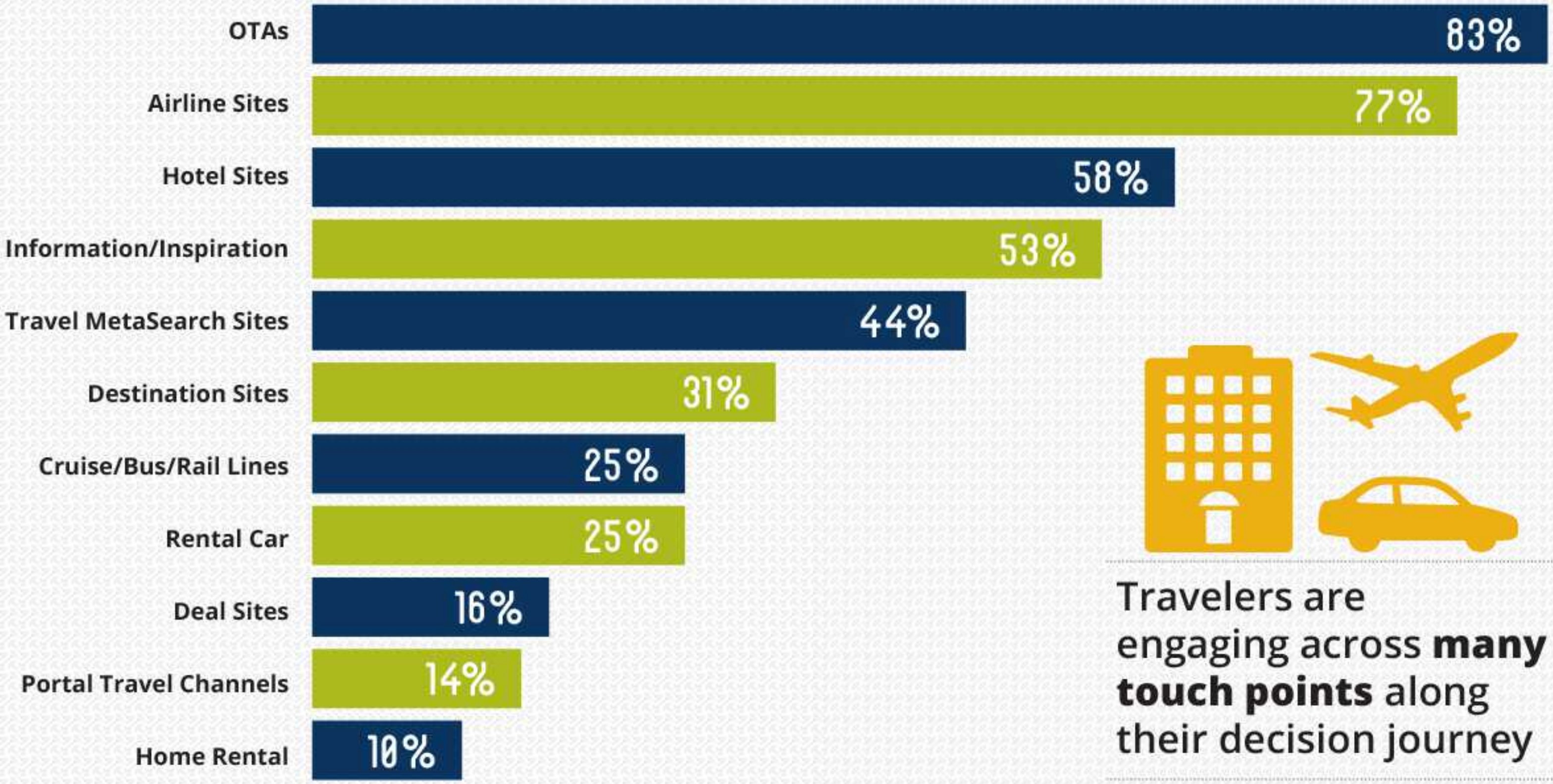
TRAVEL BUYER REACH



Travelers are engaging across **many touch points** along their decision journey

Source: comScore behavioral panel

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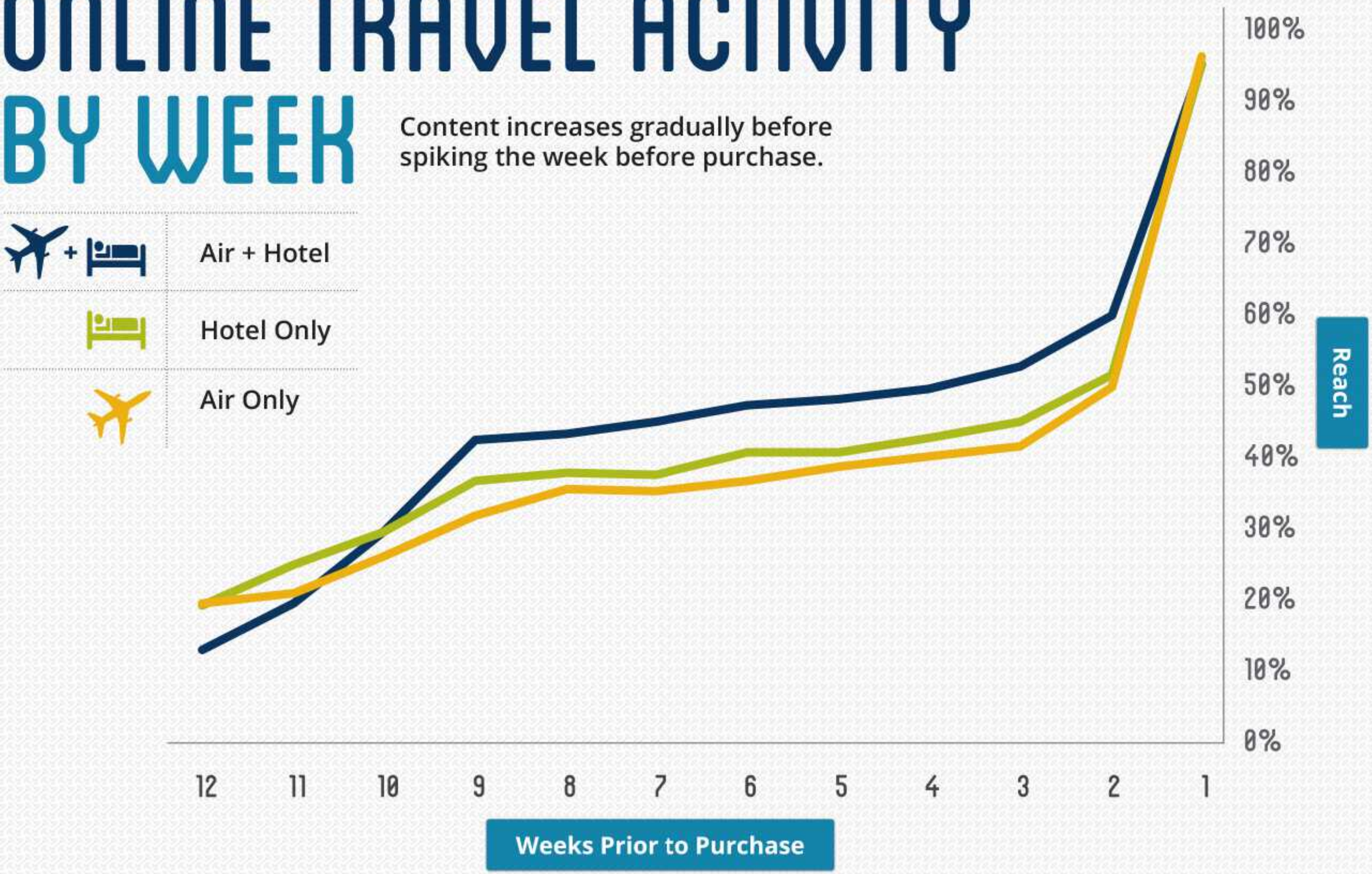
ONLINE TRAVEL ACTIVITY BY WEEK

Content increases gradually before spiking the week before purchase.



Source: comScore behavioral panel

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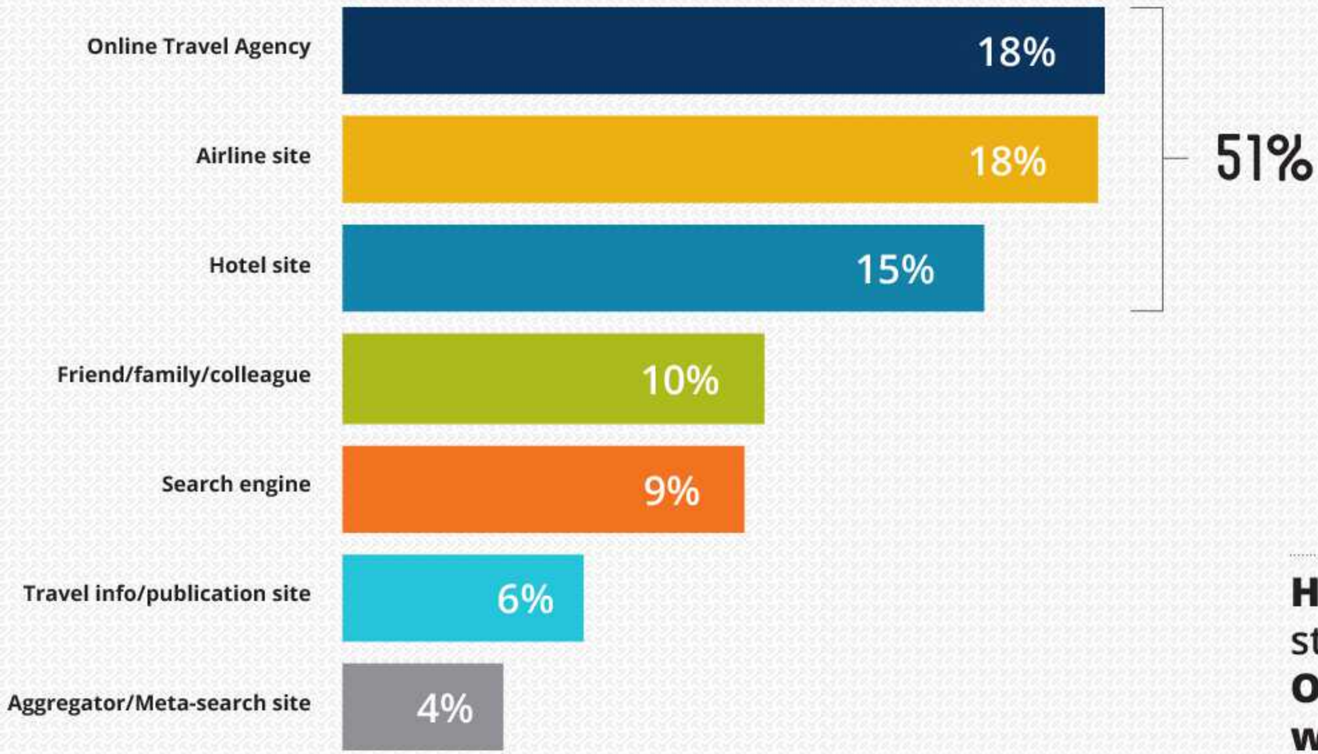
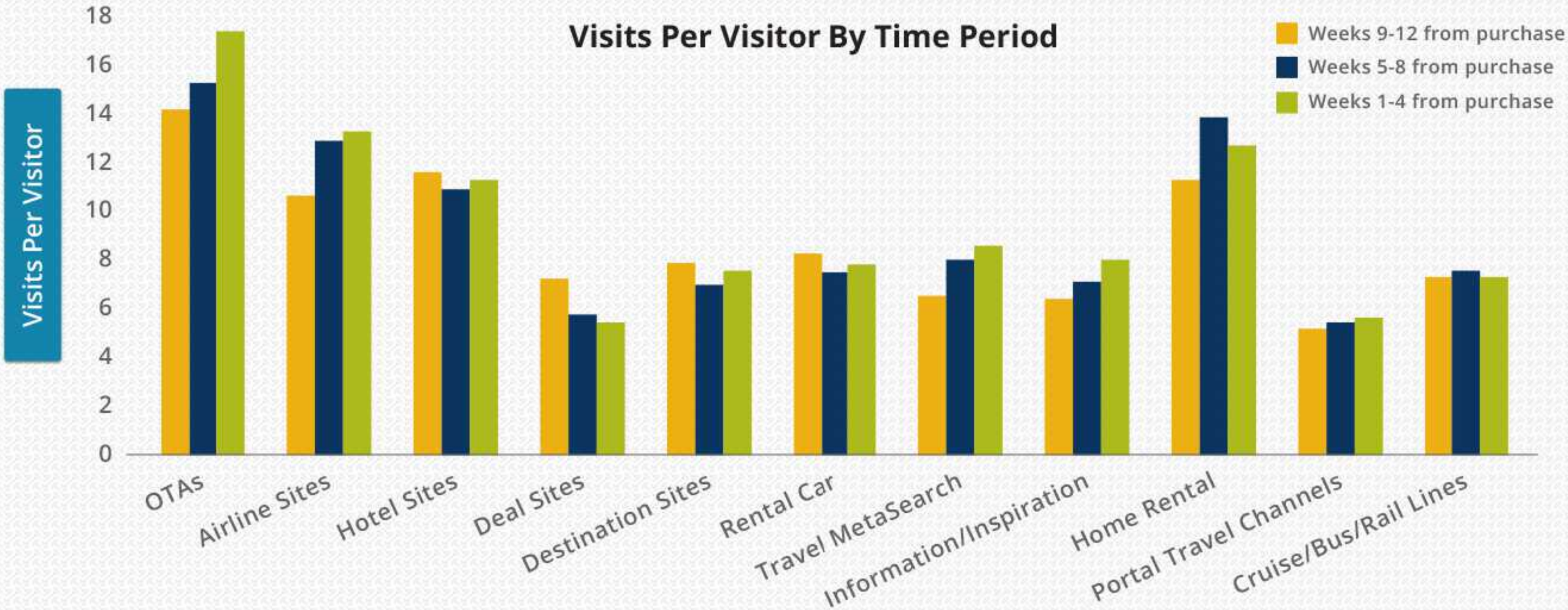
RESOURCES CONSULTED FIRST



Half of trip planning starts on either an **OTA, airline or hotel website**

FIRSTRESOURCES. Of the resources you used, which one did you consult first? Base: total respondents.

COMPARING FREQUENCY BY TIME FROM PURCHASE REFLECTS THE ROLE EACH CATEGORY PLAYS.



Airline visitors have stable usage through the middle and late stages.

Hotel site visitors have even engagement throughout the research process.

Deal sites are used for initial research; their highest visit frequency is early in the purchase path.

Metasearch, Information and Home Rental Sites see more visits closer to purchase as people prepare to book and plan their activities.

Source: comScore behavioral panel

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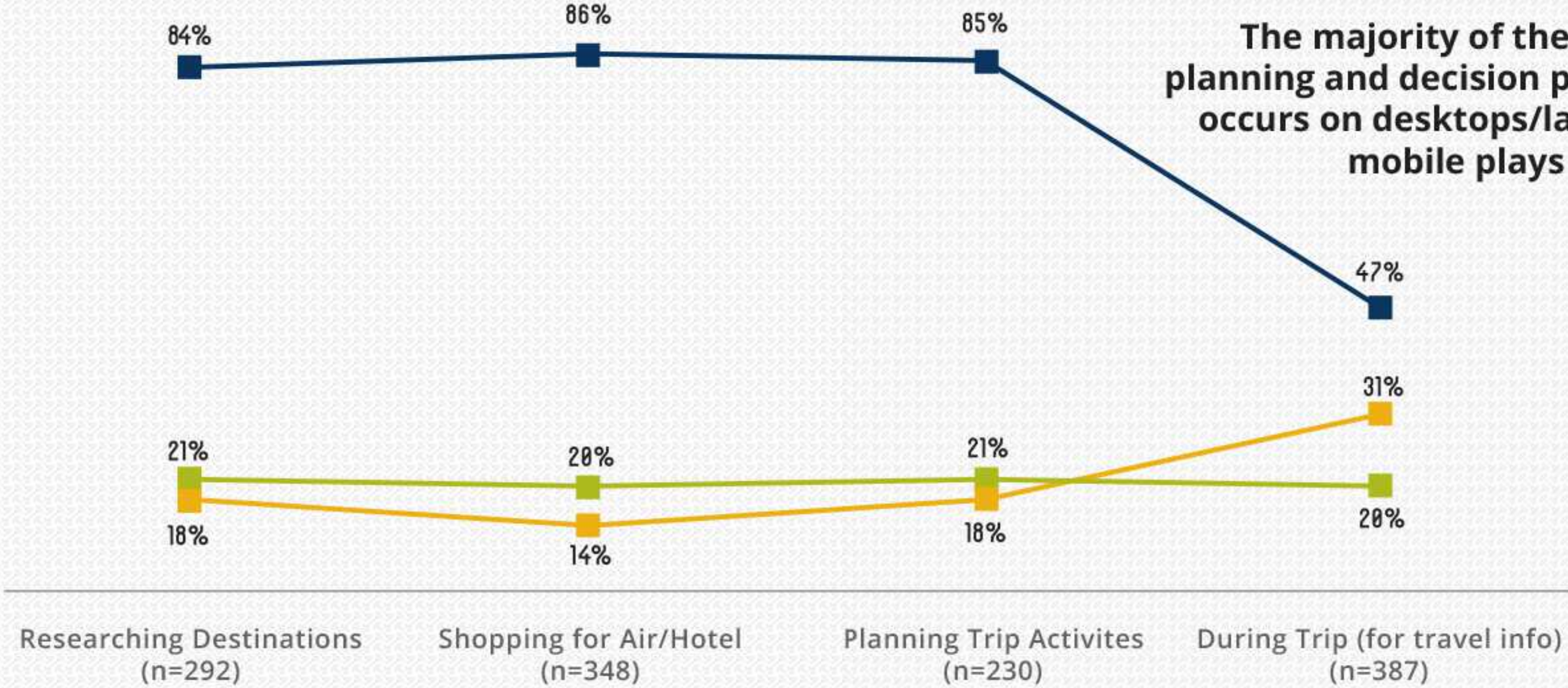
DEVICE USAGE BY TRAVEL STAGE



The majority of the travel planning and decision process occurs on desktops/laptops; mobile plays a role.

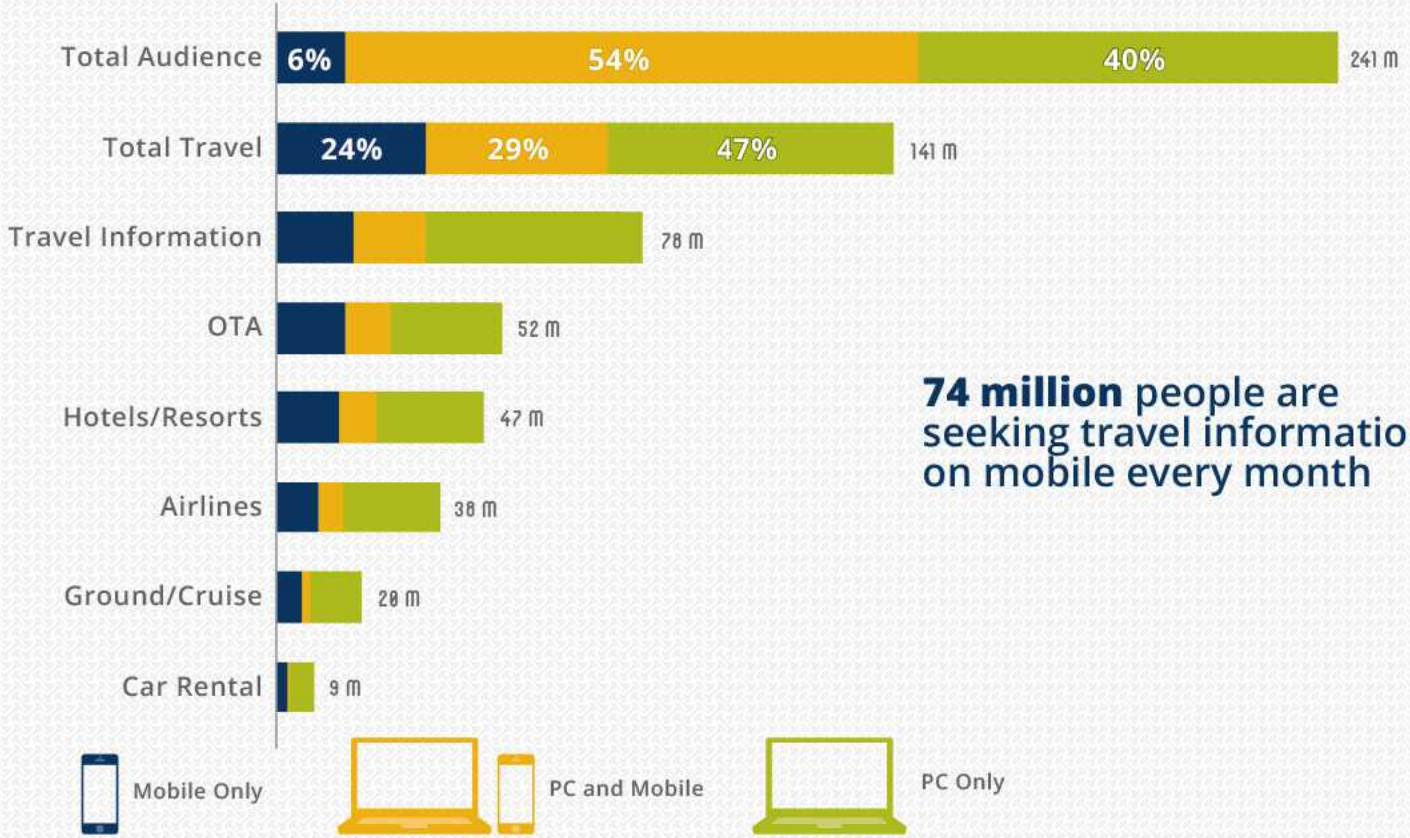
Dominates planning process and still widely used on-trip.

More likely to be used during trip for travel related info research.

Used consistently across stages.

STAGEDEVICE. Thinking of your most recent trip where you booked air travel and/or a hotel stay, which devices did you use for each of the following travel phases?
Base: Respondents who did respective decision stage and own a mobile device.

TRAVEL CONTENT IS BEING ACCESSED ACROSS DEVICES EVERY MONTH



74 million people are seeking travel information on mobile every month

Source: comScore Multi-Platform, August 2013

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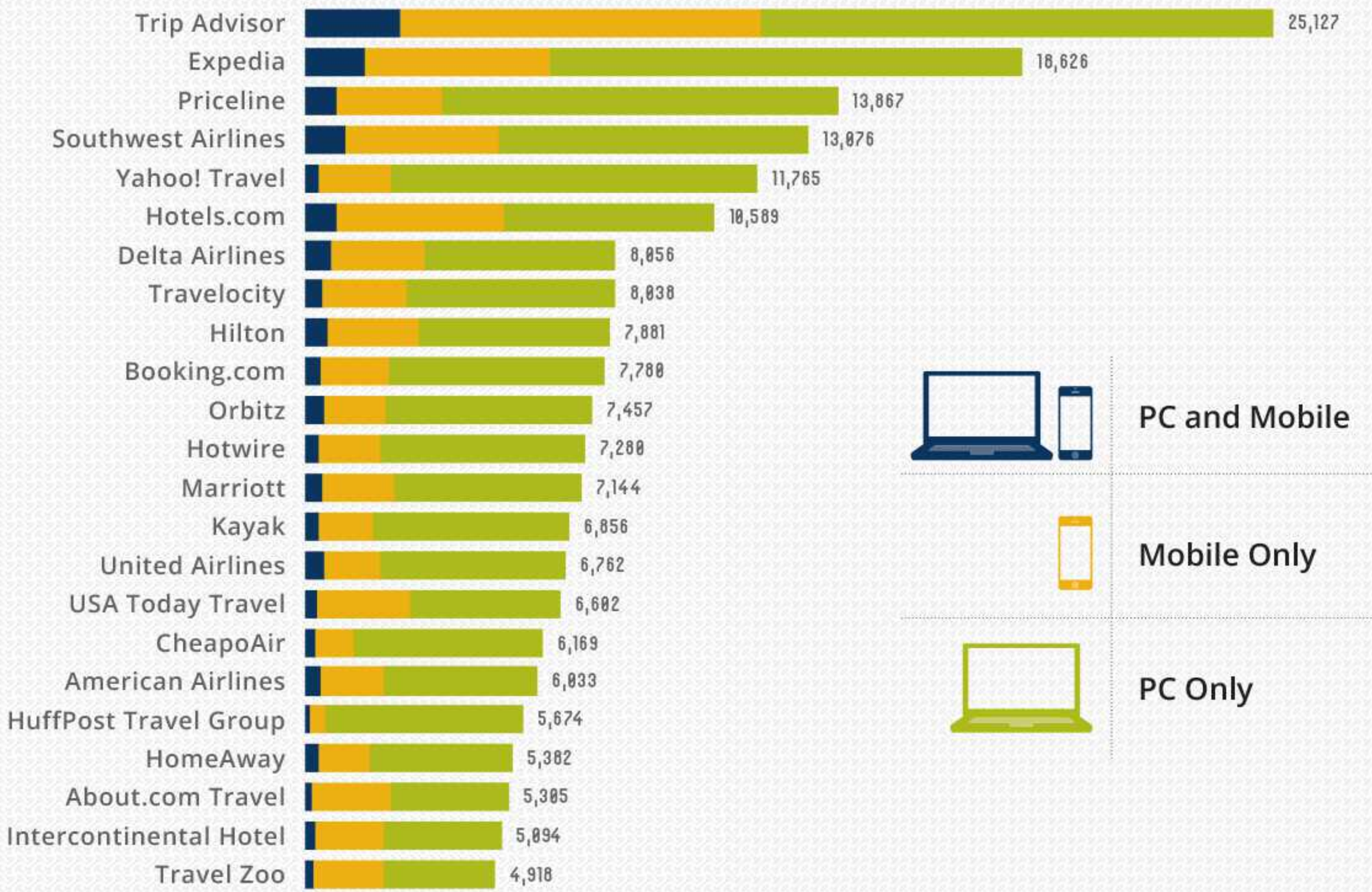
MORE PLATFORMS = EXTENDED REACH



Source: comScore Multi-Platform, August 2013

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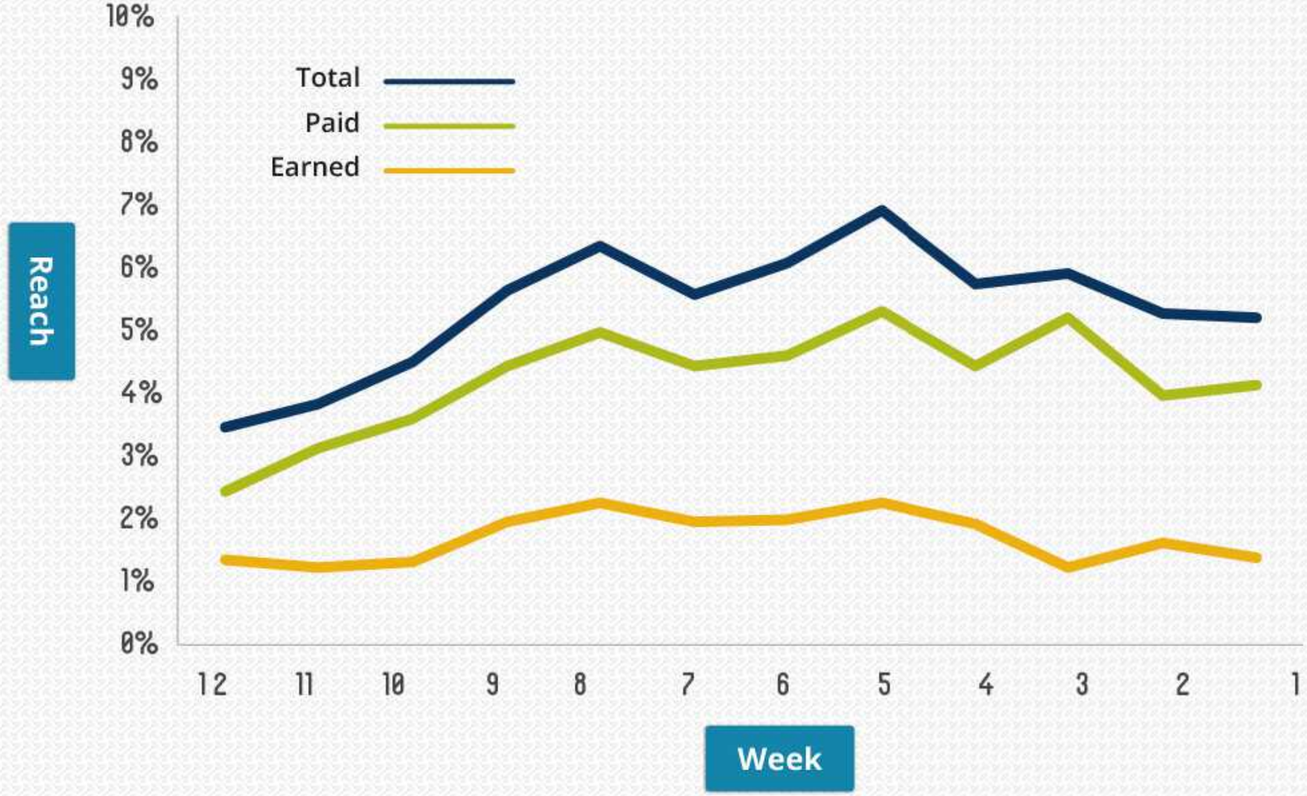
EMERGING TRAVEL CONTENT

FACEBOOK TRAVEL BRAND EXPOSURE
BY WEEK

The Reach of travel brand content on Facebook is steady throughout pre-purchase period.

- **26% of travel** buyers were exposed at some point during the 12 weeks prior; **23% paid**, **9% earned** reach.



Source: comScore behavioral panel

FACEBOOK ADS REACH ALTERNATIVE TRAVELERS

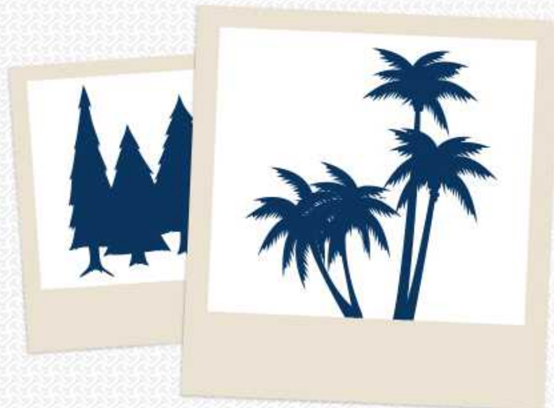
Compared to total travelers, those exposed on Facebook are...

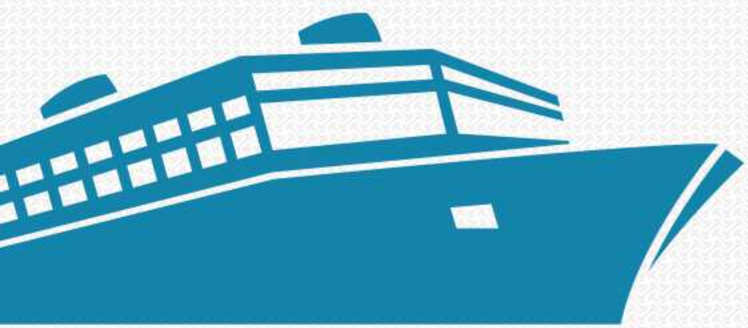
Compared to total travelers, Other Travel Buyers are **7% more likely** to be exposed to **Facebook Travel Brand Content** – and see **40% more impressions** per UV

61%

More likely to perform a Travel image search

(17% reach vs. 10%)





20%

More likely to visit Cruise/Bus/Rail Sites

(30% reach vs. 25%)

Source: comScore behavioral panel

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70 MM SEARCHERS USED TRAVEL RELATED TERMS – 367 MILLION TRAVEL SEARCHES

- Travel Information related searching (53m searches, 23 million searchers)
- Hotels related terms are the most searched for at 118 million searchers (34 million searchers)
- Air related terms 56m searches, 19 million searchers
- OTAs related terms 55m searches, 19 million searchers

comScore: Search Category, June 2013

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REACH OF TRAVEL IMAGE SEARCH BY WEEK

Travel image search rises steadily in the 5 weeks before purchase

- Although only 2% of buyers search for image the week before purchase, 10% do so at some point in the 12 week pre-purchase timeframe

Source: comScore behavioral panel

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IMAGE SEARCHERS ARE CONTEXT SEEKERS.

Compared to total travelers, Image Searchers are.....

62%
More likely to visit Destination Sites

(43% reach vs. 31%)

93%
More likely to search for Travel Information

(69% reach vs. 36%)

50%
More likely to visit Travel Portals

(21% reach vs. 14%)

Compared to total travelers, **Hotel Buyers Are 2X more likely to search for Travel Images** in the week before purchase.

Source: comScore behavioral panel

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NATIVE MARKETING TESTS RATE SIMILARLY TO NON-NATIVE CONTENT ON MANY ATTRIBUTES, BUT FOCUS ON EXPERIENTIAL CONTENT IS IMPORTANT TO DIFFERENTIATE NATIVE MARKETING.

Images play an important role in many buyers' decisions and may be used to **create a greater sense of 'excitement'** in native content.

NATIVE VS. NON-NATIVE (n=1,058)	CONTENT ATTRIBUTES (+/- 3%)
Rated Similarly	Informative Believable Helpful Intriguing
Native Marketing Rated Lower	Inspirational Relevant Fun

Native

Non-Native

QNATIVE/QNONNATIVE. Based on the images above, what do you think about the experience offered by these websites? Please indicate your level of agreement with the descriptions below, where 1=Completely Disagree and 7=Completely Agree.
Base: Total respondents

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CONTENT SOUGHT BY TRAVELERS

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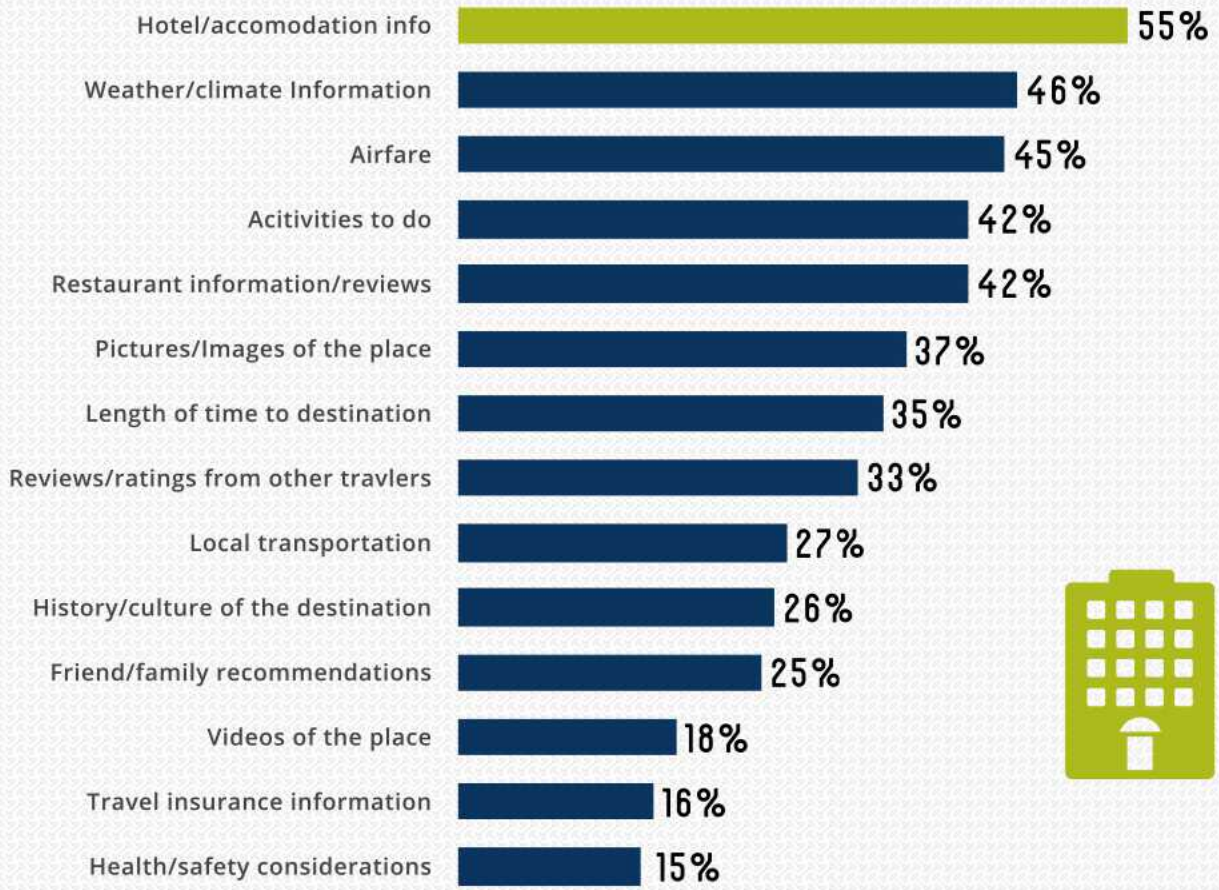
INFORMATION GATHERED ACROSS TRAVEL DECISION STAGES



Hotel/accommodation information is the **most commonly sought content** across decision stages.

CONTENT. What types of information did you seek for each of the following travel phases for this trip?
Researching destination: (n=385)
Shopping Air/Hotel: (n=472)
Planning Trip Activities: (n=325)

HOTEL/ACCOMMODATION INFO IS A TOP CONSIDERATION ACROSS ALL THREE PURCHASE DECISION PHASES.

Researching Destinations	Shopping for Air Travel/Hotels	Planning Trip Activities	During Trip
50% Hotel/ Accommodation info	**56%** Hotel/ Accommodation info	**58%** Activities to do	**37%** Weather/Climate information
40% Pictures/Images	**56%** Airfare	**37%** Restaurant information/reviews	**33%** Restaurant information/reviews
39% Activities to do	**34%** Reviews/Ratings from other travelers	**36%** Hotel/Accommodation info	**28%** Activities to do
38% - Reviews/ratings from other travelers **37%** - Weather/Climate Information **33%** - History/Culture of the destination **32% -** Length of time to destination **32% -** Restaurant information/ reviews	**28%** - Length of time to destination **25%** - Pictures/Images **20%** - Weather/Climate information	**35%** - Weather/Climate information **34%** - Pictures/Images **33%** - Reviews/Ratings from other travelers	**21%** - Hotel Accommodation info **16%** - Pictures/Images **16%** - Airfare **16%** - Local Transportation

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Researching destination: (n=385)
Shopping Air/Hotel: (n=472)
Planning Trip Activities: (n=325)
During Trip: (n=581)

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PICTURES/IMAGES ARE MOST IMPORTANT DURING DESTINATION SELECTION

BUT, ALSO PLAY AN IMPORTANT ROLE IN SUBSEQUENT STAGES.

Researching Destinations	Shopping for Air Travel/Hotels	Planning Trip Activities	During Trip
50% Hotel/ Accommodation info	**56%** Hotel/ Accommodation info	**58%** Activities to do	**37%** Weather/Climate information
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During Trip: (n=581)

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ACTIVITIES ARE A KEY CONSIDERATION FOR BOTH DESTINATION SELECTION AND TRIP PLANNING.

Researching Destinations	Shopping for Air Travel/Hotels	Planning Trip Activities	During Trip
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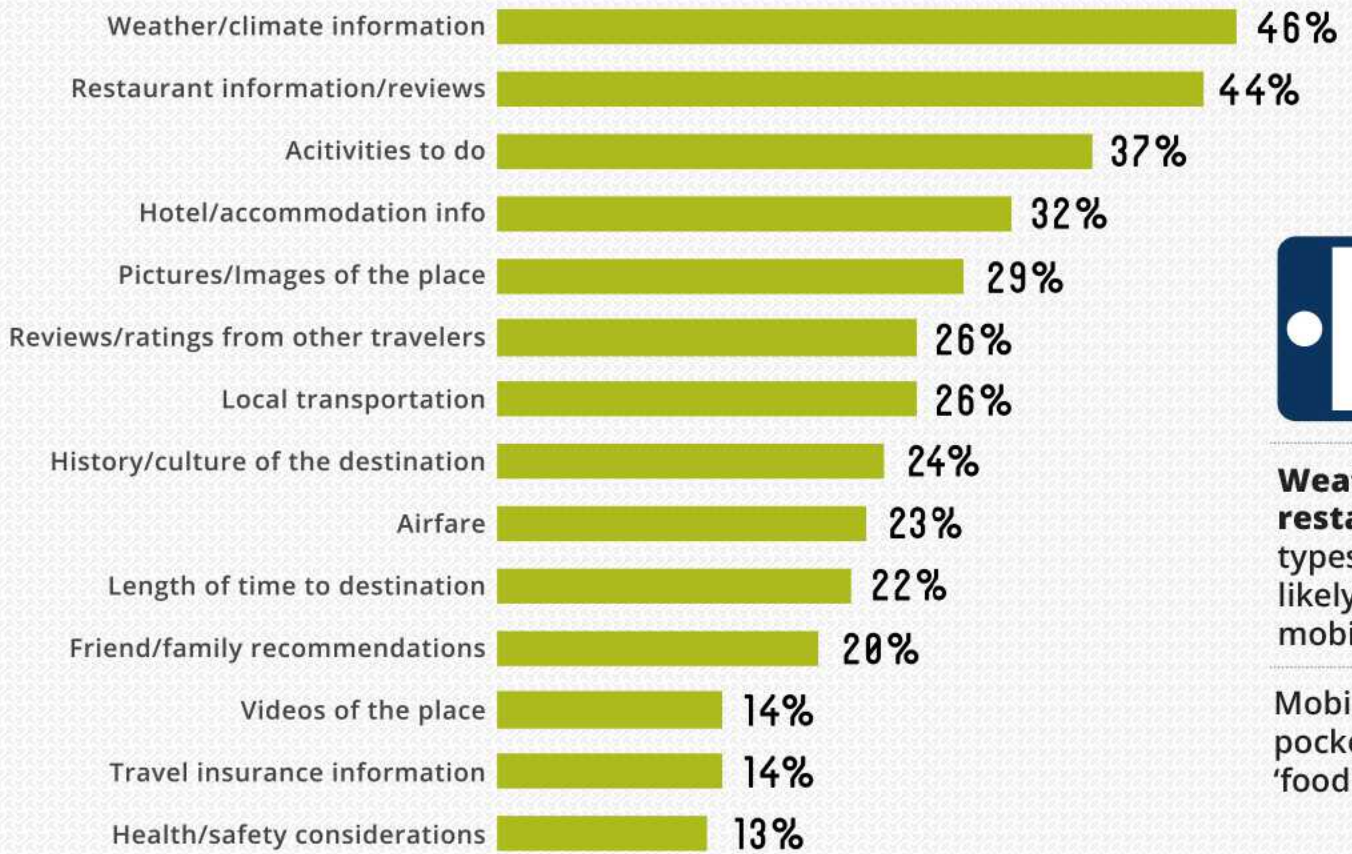
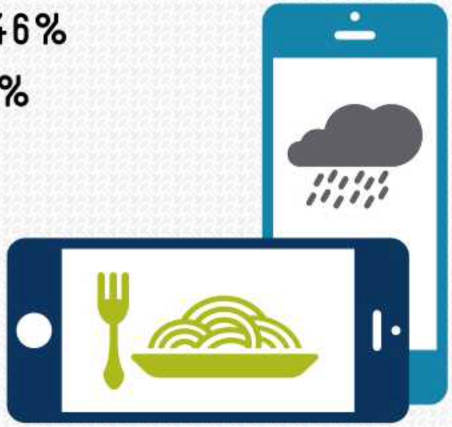
INFORMATION ACCESSED BY MOBILE





Weather/climate info and **restaurant reviews** are the types of information most likely to be accessed on a mobile device.

Mobile devices act as a pocket weatherman, and 'foodie' for travel buyers.

STAGEDEVICE. Thinking of your most recent trip where you booked air travel and/or a hotel stay, which devices did you use for each of the following travel phases?
Base: Respondents who did respective decision stage and own a mobile device.

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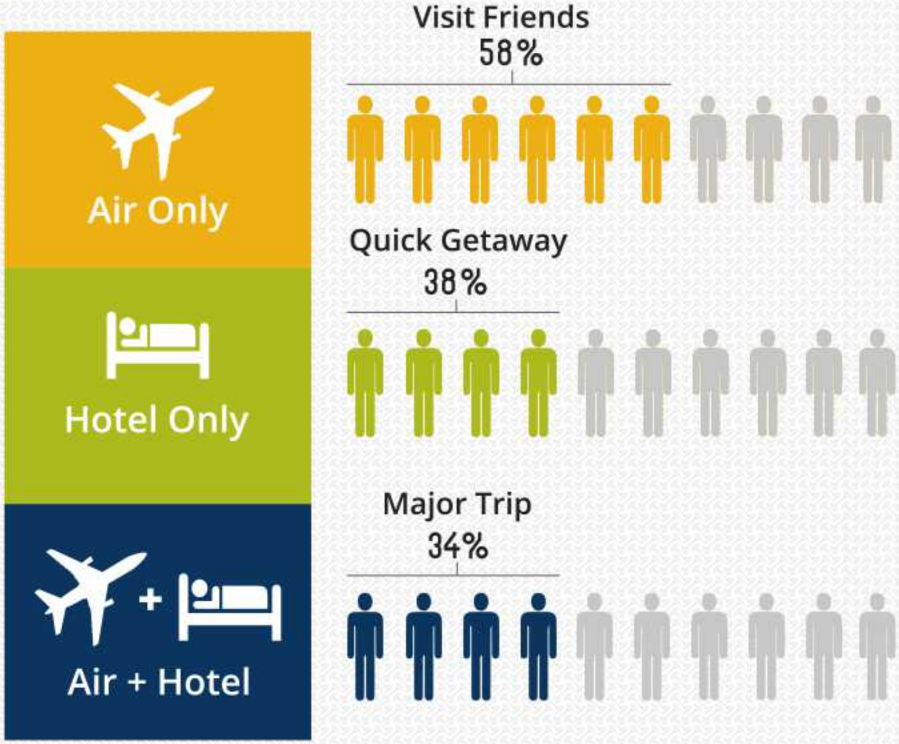
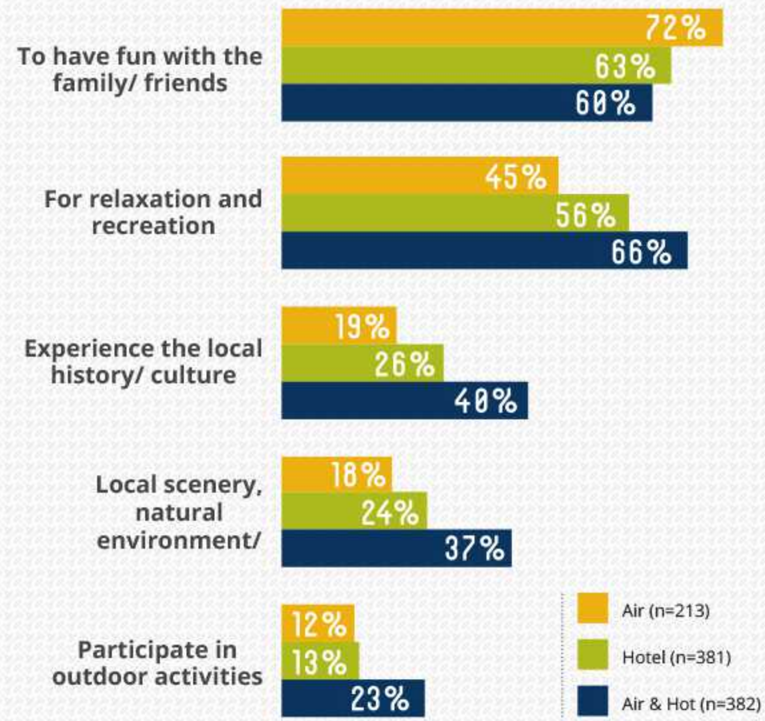
TYPE OF PURCHASE MAPS TO TYPE OF TRIP.





BOOKTYPE. Thinking about the most recent trip where you booked air travel and/or a hotel stay, which of the following best describes the type of trip you booked? Base: Total respondents (n=1058)
BOOKREASON. <<Which of the following best describes your reason(s) for booking this trip?>> OR << What made you choose to add the leisure part of this trip?>> Base: Respondents with leisure aspect to trip

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AIR ONLY BOOKERS ARE NO NONSENSE SHOPPERS

Air Searches Per Searcher: **4.3**

Though more likely to visit Airline Sites, Air Only buyers yield 54% fewer visits per visitor.

Content needs center more on trip logistics and fares.

HOTEL ONLY BOOKERS ARE DESTINATION RESEARCHERS

Hotel Searches Per Searcher: **6.6**

Compared to total buyers, Hotel Only buyers are...

14% More likely to visit **Travel Portals** (16% reach vs. 14%)

19% More likely to visit **Destination Sites** (34% reach vs. 31%)

10% More likely to visit **Information/ Inspiration Sites** (57% reach vs. 53%)

AIR + HOTEL BOOKERS ARE HEAVY ENGAGERS

Across all travel sites, these buyers averaged **46 visits** compared to total travel buyers averaging only **32**.

18.4 Visits per visitor To **OTAs**

15.4 Visits per visitor To **Airline** Sites

Source: comScore Custom Profile

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CONTENT NEEDS ON TRIP

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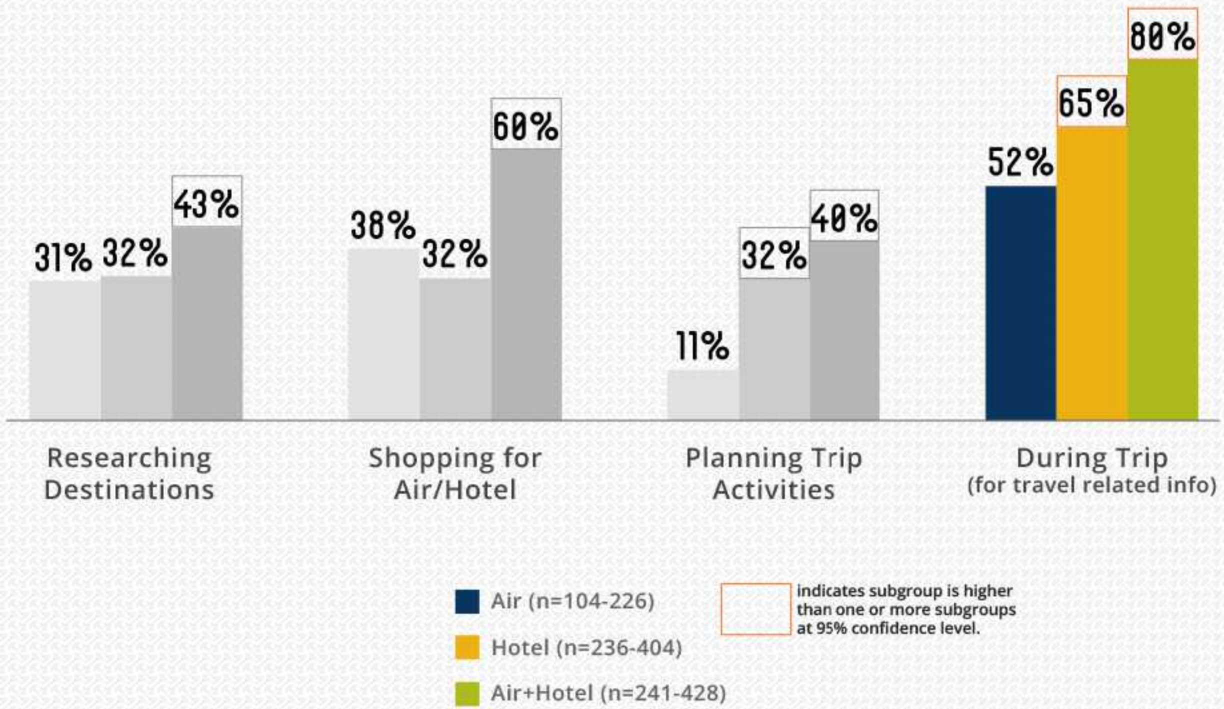
TRAVEL-RELATED RESEARCH
BY TRIP STAGE



Hotel + Air Buyers and Hotel Only buyers are more likely to do travel-related research during their trip.

There is an opportunity to stay top-of-mind with these travelers through relevant content for on-the-go research.

STAGE. Which of the following have you done as it relates to the most recent trip where you booked air travel and/or a hotel stay?

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STAY CONNECTED WITH TRAVELERS

Air + Hotel
during trip

- 41% Weather/ climate
- 39% Restaurant information/reviews
- 33% Activities to do

Hotel Only
during trip

- 36% Weather/ climate
- 35% Restaurant information/reviews
- 29% Activities to do
- 29% Hotel Info

Air Only
during trip

- 39% Airfare
- 29% Weather/ climate information
- 16% Length of time to destination

Stay connected with travelers who've booked hotel accommodation through weather, restaurant and activity information. Stay connected with Air Only bookers by continuing to provide Airfare information.

Source: CONTENT. What types of information did you seek for each of the following travel phases for this trip?
During Trip; (n=581)

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POST TRIP ACTIVITY

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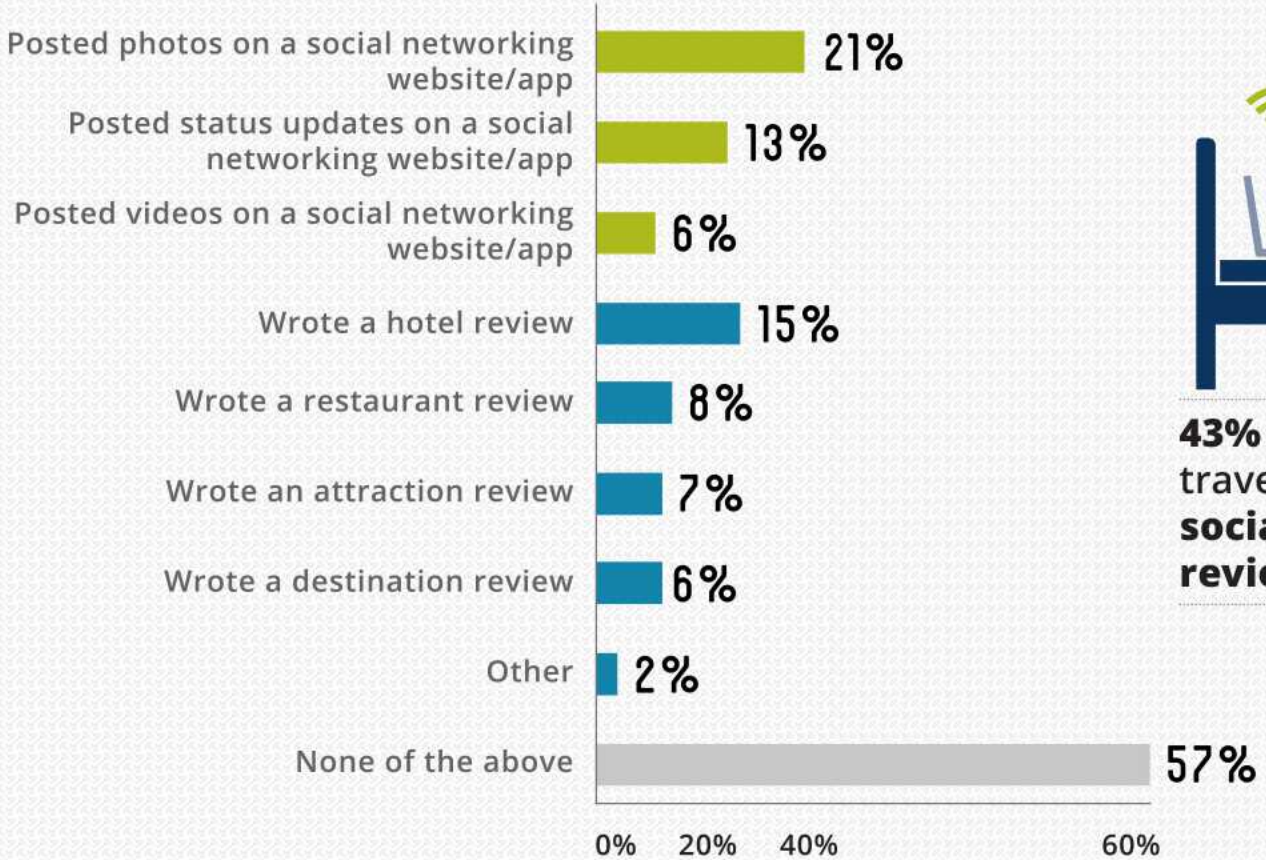
ACTIONS AFTER RETURNING HOME



43% of travelers will post travel-related content on **social media** or **write reviews** upon return.

POSTACTIONS1. Thinking of the most recent trip you have taken, which of the following did you do after you returned home from your trip? Base: Total respondents.

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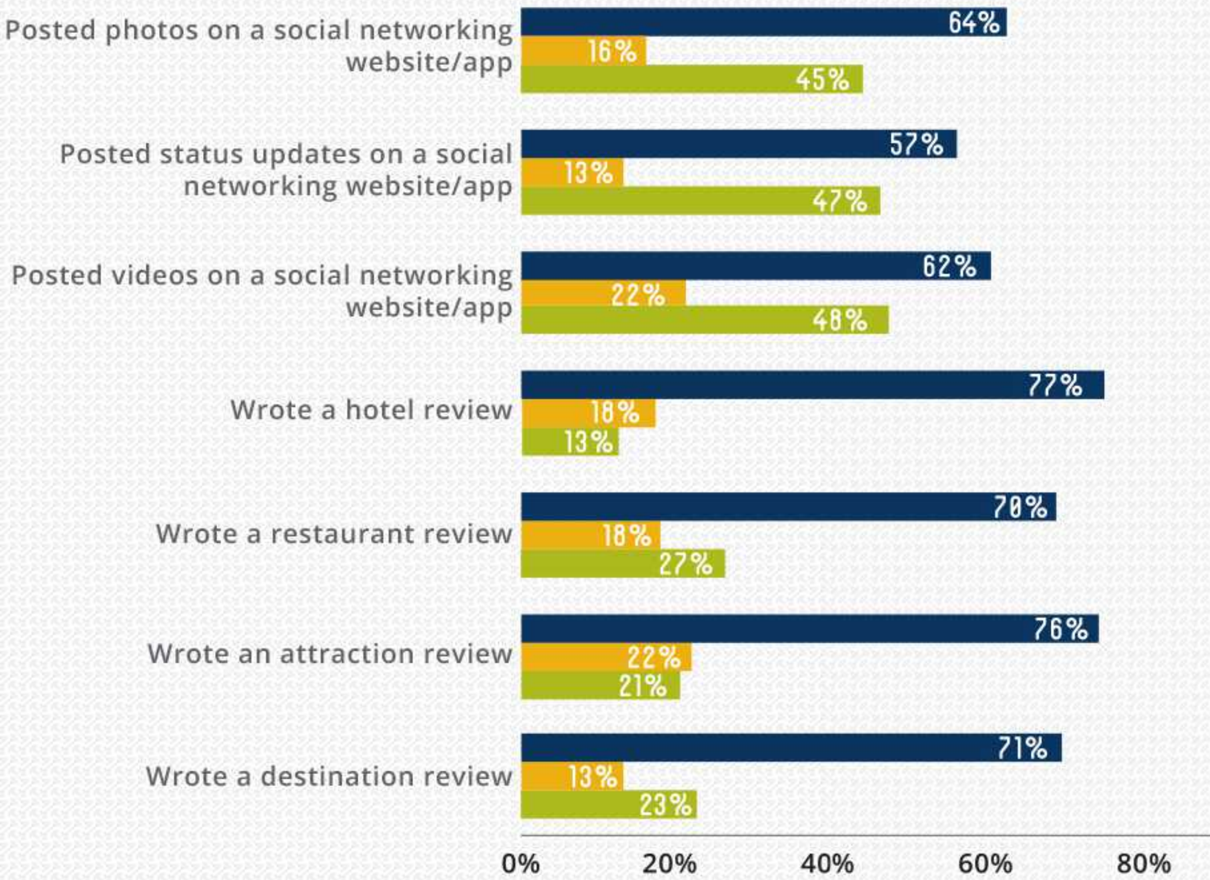
POST-TRIP ACTIVITY BY MOBILE DEVICE



(n=52-185)

Main device for writing reviews.

Used by 10-20% of travelers for post-trip activities.

Neck and neck with lap/desktops for social media posting.

While reviews are most likely to be written on laptops, social media posts are done nearly as much on smartphones as they are on laptops.

POSTACTIONS2. What device did you use to complete each of the following actions? Base: Respondents who wrote a review or posted to social media.

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KEY TAKEAWAYS FOR MARKETERS

- Consumer travel spending and advertiser spending are both on the rise
- Travelers are embracing mobile in a significant way; all brands driving mobile consumption
- Content and advertising strategies need to span all devices or risk missing out on nearly ¼ of prospective customers
- The opportunity to engage with travelers exists across travel categories; reach and engagement levels during the content journey inform where brands can optimize their reach, frequency and messaging to customers.
- Emerging content areas should continue to play a role in brand strategies. Native Marketing should balance credible information with fun and inspiration content
- Traveler content needs vary by decision phase and device. Tailor content presented to travelers based on an understanding of reason for trip, component booked and device.
- New content is generated post trip presenting opportunities to leverage and influence future travelers in their content journey.
- Look at how OTAs can play a critical role in your marketing strategy - at all stages in the funnel
- Test and learn. Iterate and repeat.

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THANK YOU.

Learn more at:

www.advertising.expedia.com

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