June 2014

The 2014 Traveler's Road to Decision

think with Google

Background and methodology

Google commissioned Ipsos MediaCT, an independent marketing research company, to conduct a travel-tracking study to better understand the role of the internet in making travel-related decisions. The current report reflects the total sixth wave of this research.

Respondents completed a 20-minute A&U survey focused on travel habits and attitudes. If qualified, respondents were routed to one of five deep dive sections: Airline, Cruise, Lodgings, Car Rental, and Vacation Packages.

Interviews were conducted from May 12 to June 4, 2014, yielding a total sample of 5,000 consumers (3,500 personal and 1,500 business) who have traveled at least once for personal reasons (or a minimum of three times for business purposes) in the past six months. Also interviewed were 1,500 affluent ($250k+ household income) individuals who has traveled for personal reasons in the past six months.

To qualify, respondents had to be 21–64, live in the U.S., have no sensitive industry employment, go online at least once per month, and have some involvement in their personal/business travel decisions.

Source: Google Travel Study, June 2014, Ipsos MediaCT

Inspiration

Research

Mobile

TV & Video

Family Travel

Inspiration

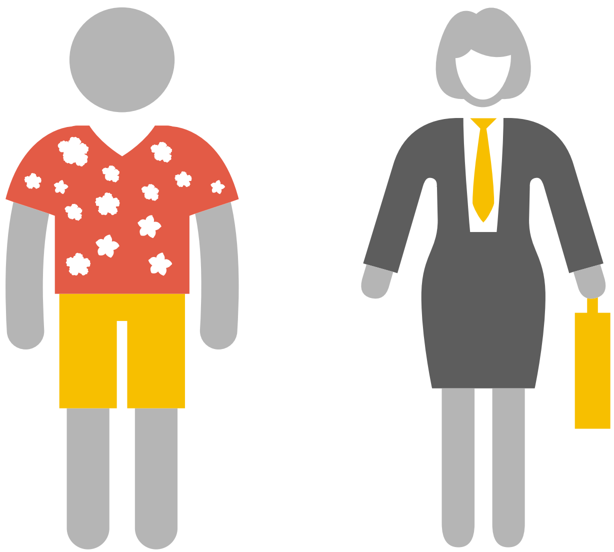
Travelers rely on social/video/photo sites and search engines for trip inspiration

Travelers agree that they turn to the web **early on in the travel process**

I generally begin researching online before I decide where or how I want to travel.

Leisure

65%



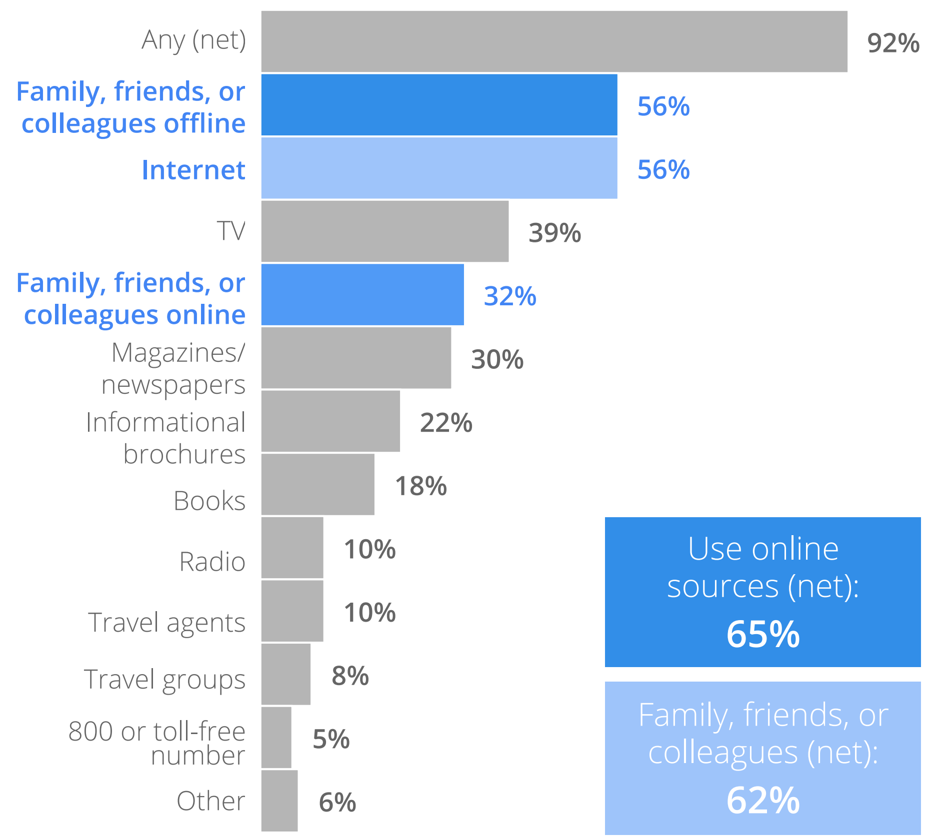
Business

69%

Base: Total Respondents (Personal n=3500; Business n=1500); Q21: Here are some (more) statements that may or may not describe your attitudes and opinions related to travel. Please indicate to what extent 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.)
Source: Google Travel Study, June 2014, Ipsos MediaCT

Friends/family and online sources are critical to travel inspiration

SOURCES OF INSPIRATION (LEISURE TRAVEL)

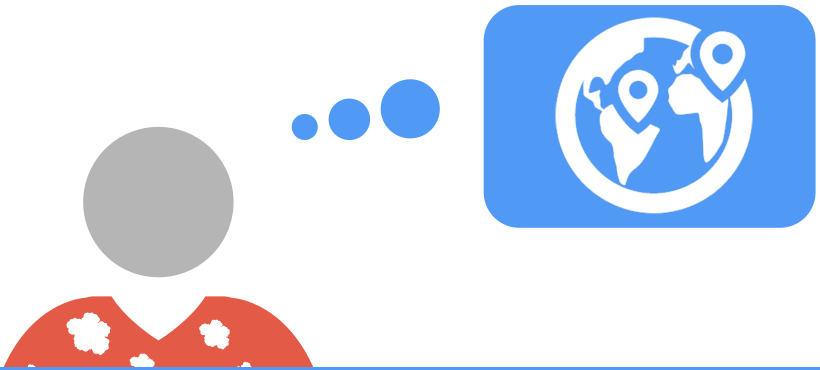


Use online sources (net): **65%**

Family, friends, or colleagues (net): **62%**

Base: Personal Quota (n=3500)
Q6D: Which of the following sources typically inspire you to start thinking about your personal or leisure trips? (Select ALL that apply.)
Source: Google Travel Study, June 2014, Ipsos MediaCT

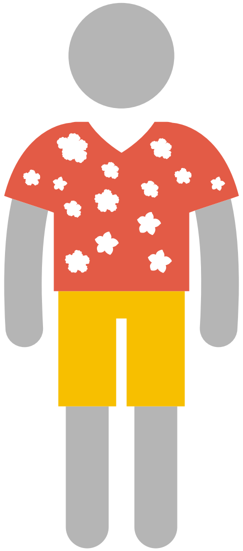
Search engines and YouTube are **top online sources of inspiration**



Social networking, video, or photo sites (Net)	**83%**	**YouTube**	**42%**
		Google+	**17%**
Search engines	**61%**		
Travel review sites/apps	**42%**		
Destination-specific sites/apps	**31%**		
Daily Deal sites/apps	**27%**		

Base: Personal quota and use online sources for inspiration (n=2286)
INSPIRE1: And, which online sources typically inspire you to start thinking about your personal or leisure trips? (Select ALL that apply.)
Source: Google Travel Study, June 2014, Ipsos MediaCT

Online travel videos are **influential in early stages**



Leisure Travelers

When travel videos are viewed
(among those who watched/commented on travel-related video)

65%	When thinking about taking a trip
48%	When thinking about what type of trip to take
61%	When choosing a destination

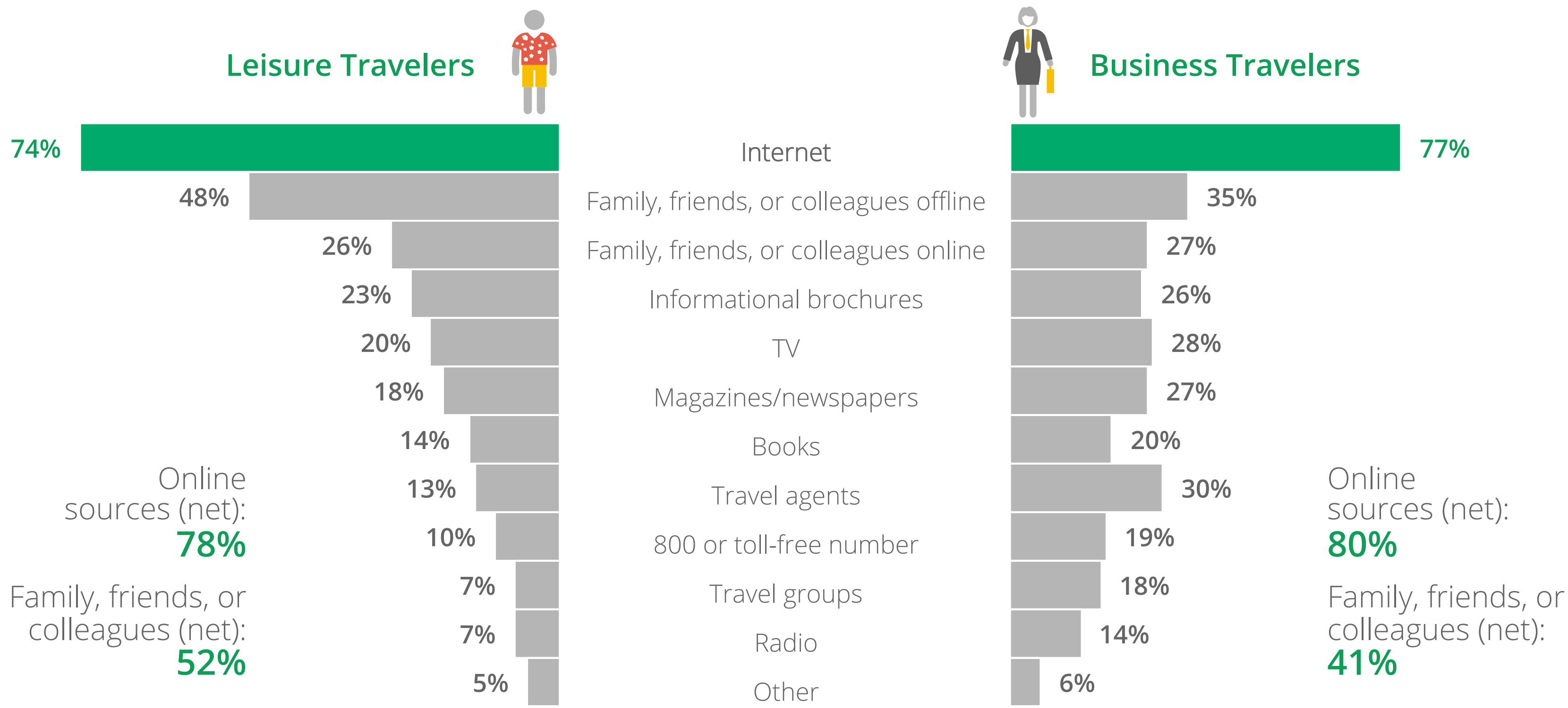
Base: Watched/commented on travel-related video (Personal n=1239, Business n=860)
Q5: At what points in your travel planning process do you view videos online? (Select ALL that apply.)
Source: Google Travel Study, June 2014, Ipsos MediaCT

Research: Digital is key

The path to purchase is still complex, and traveler search activity is intensifying

The internet is the top source for both leisure and business travel planning

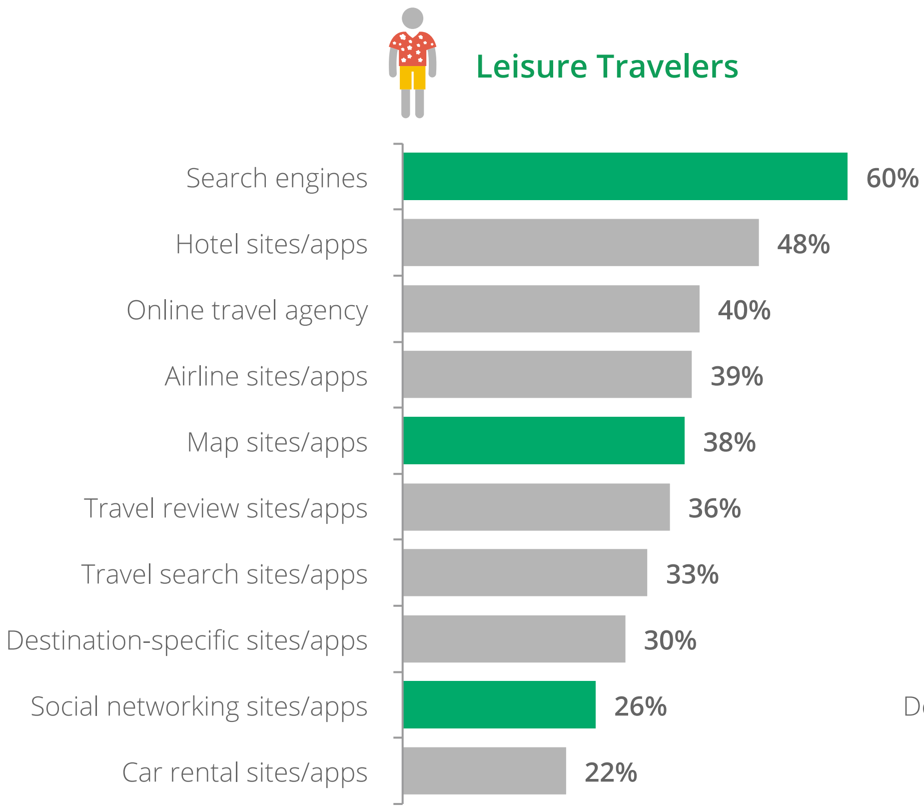
TRAVEL PLANNING SOURCES

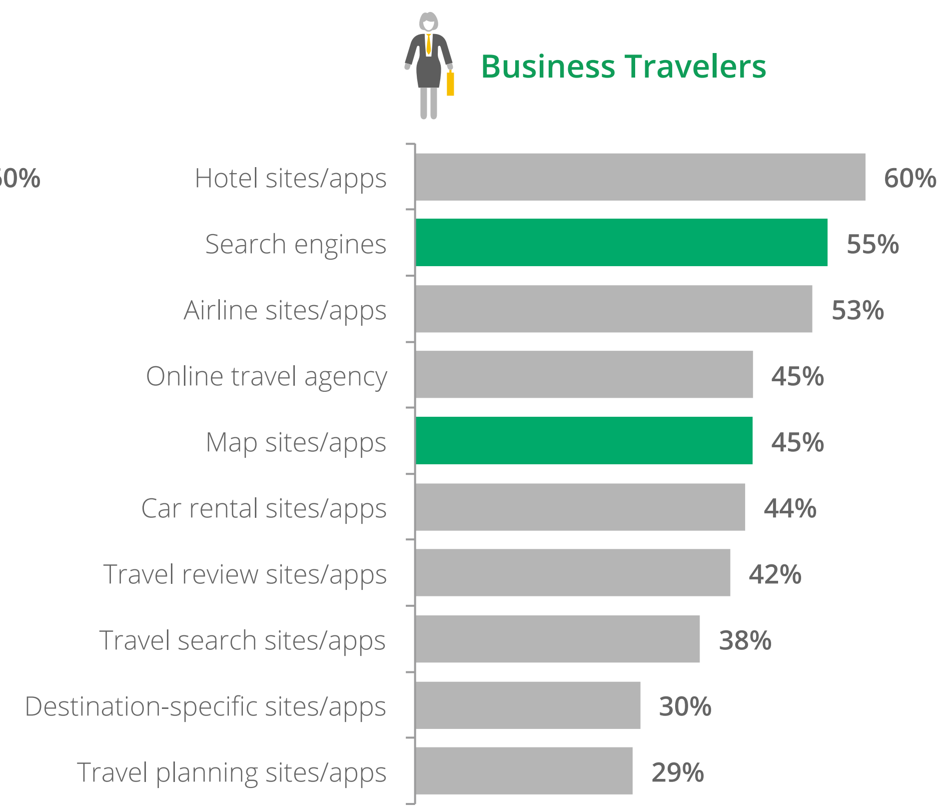


Base: Personal quota (n=3500); Business quota (n=1500)
Q7: Which of the following sources do you typically use to plan personal or leisure trips/business trips? (Select ALL that apply.)
Source: Google Travel Study, June 2014, Ipsos MediaCT

Search engines are among the **most popular online planning sources for travelers**, particularly among leisure travelers

TOP 10 ONLINE SOURCES USED IN TRAVEL PLANNING

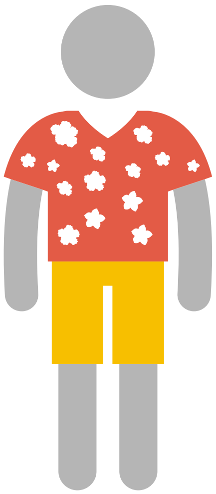




Base: Use internet to plan travel (Personal n=2734, Business n=1199)
Q10: Which of the following online sources do you typically use to plan personal or leisure trips/business trips? (Select ALL that apply.)
Source: Google Travel Study, June 2014, Ipsos MediaCT

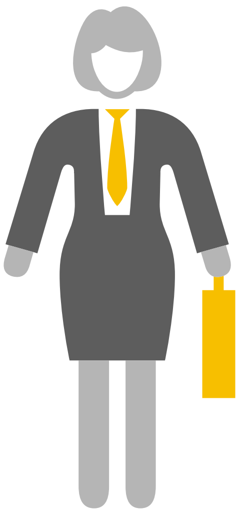
Leisure

57%



Business

64%



I always start my travel booking and shopping process with Search.

Base: Total Respondents (Personal n=3500; Business n=1500) Q21: Here are some (more) statements that may or may not describe your attitudes and opinions related to travel. Please indicate the extent to which 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.)
Source: Google Travel Study, June 2014, Ipsos MediaCT

Leisure travelers are increasingly **turning to search engines first** vs. brand sites/apps for online trip planning

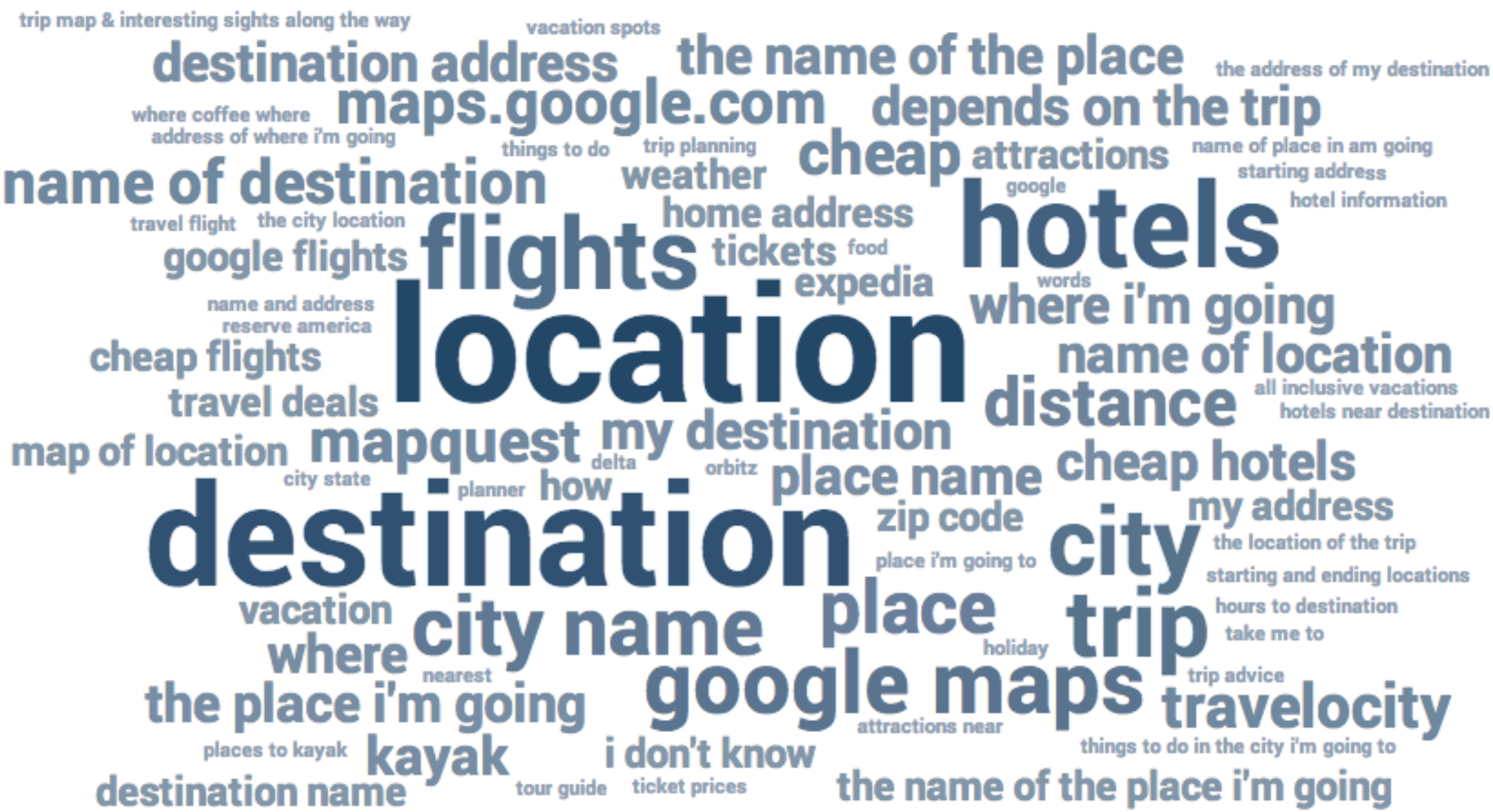
SITE/APP* WHERE LEISURE TRAVELERS TYPICALLY *FIRST START* ONLINE TRAVEL PLANNING

Top 2		2014	2013
Car Rental	Brand sites/apps	38%	44%
	Search engines	**24%**	**16%**
Air travel	Brand sites/apps	45%	49%
	Search engines	**18%**	**13%**
Overnight accommodations	Brand sites/apps	31%	37%
	Search engines	**26%**	**18%**
Cruises	Brand sites/apps	36%	36%
	Search engines	**19%**	**14%**

Note: brand sites/apps = airline/hotel/car/cruise sites/apps

Base: Personal Quota who OTAs, search engines, airline/hotel/cruise/car sites, travel review sites, destination sites, online video sites, social networking sites or daily deal sites to plan trips (floating base) Q10e: When looking for information on the following for your personal or leisure trips, where do you typically first start your online travel planning? (Select ONE for each)
* In 2013, sources were referred to as "sites", while in 2014, sources were referred to as "sites/apps"
Source: Google Travel Study, Waves 4, 5, and 6, April to May 2012 and May to June 2013, 2014, Ipsos MediaCT

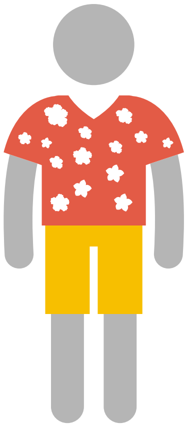
What's the first thing that you type into Google when you start to plan a trip?



Travelers rely on **generic and branded searches** across planning stages

SEARCH TERMS THAT LEISURE TRAVELERS USE IN PLANNING

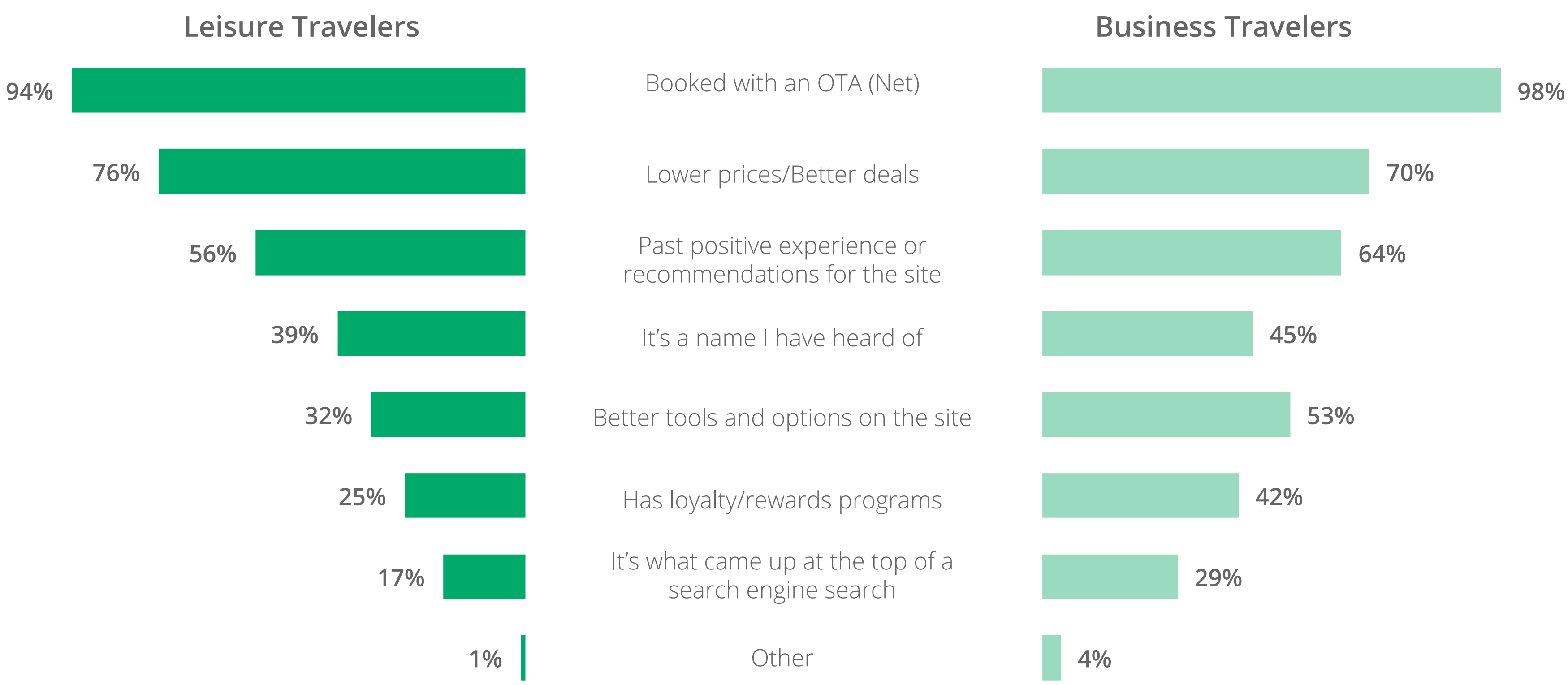
	When first starting to plan	When considering multiple possibilities	When ready to book/reserve
Destination-related terms	51%	48%	20%
Price-related terms	41%	49%	23%
Specific brand or website names	31%	48%	30%
Activity-related terms	36%	49%	20%
Terms related to specific needs or wants	32%	43%	22%



Base: Used search engines to plan trips (Personal travelers n=1634) RESEARCH3: You mentioned you use search engines (e.g., Google, Bing, Yahoo!) to plan your personal or leisure trips. At what point do you typically type in these different kinds of words and phrases in search engines like Google, Bing and Yahoo!? (Select ALL that apply for each keyword.)
Source: Google Travel Study, June 2014, Ipsos MediaCT

One in three leisure travelers and one in two business travelers select an **OTA for its superior site tools and options**

REASONS FOR BOOKING ON SPECIFIC ONLINE TRAVEL AGENCY SITES/APPS



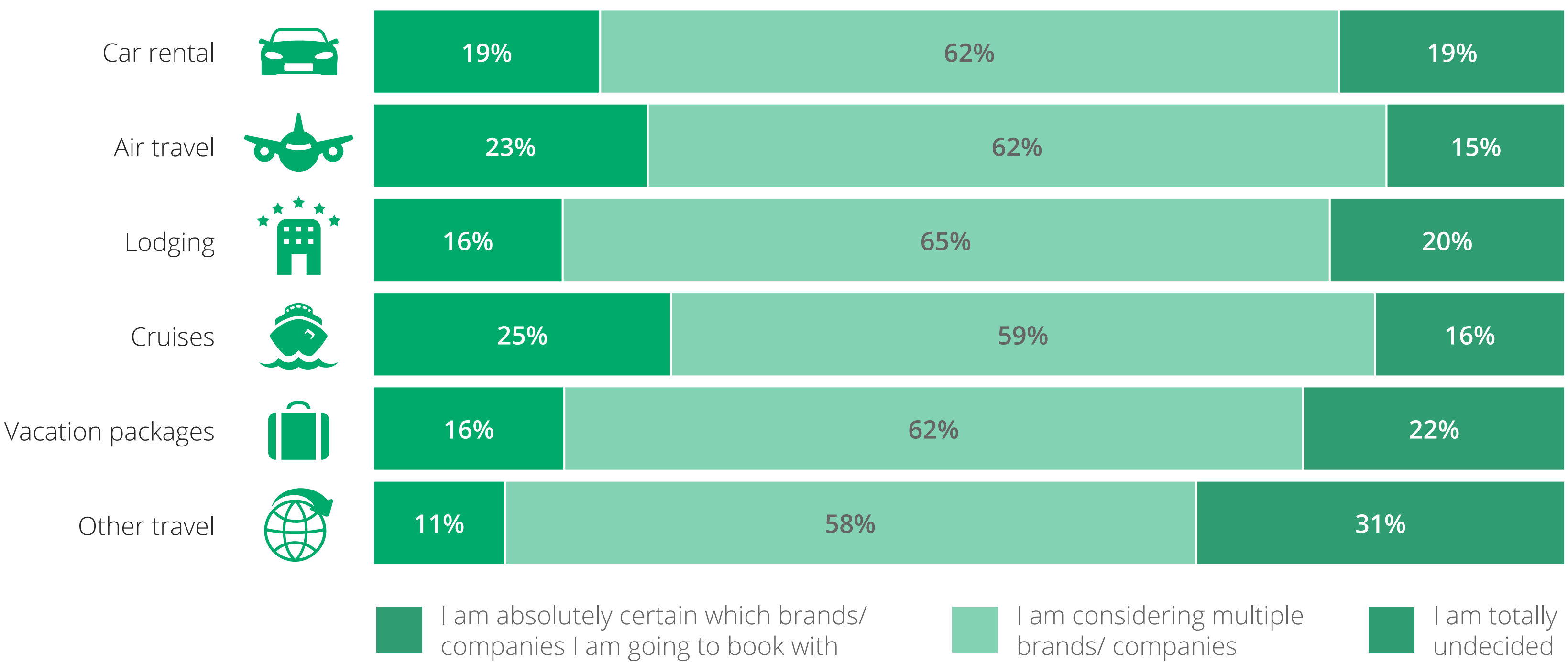
Base: Use OTAs for travel planning (Personal n=1099; Business n=540)
RESEARCH4: You mentioned you use online travel agency sites/apps (e.g., Expedia, Travelocity, Priceline, Orbitz) to plan your personal or leisure trips / business trips. If you booked any component of your trips with online travel agency sites/apps, for which reasons did you choose the specific online travel agency site(s)/app(s) (e.g., Expedia, Travelocity, Priceline, Orbitz)? (Select ALL that apply.)
Source: Google Travel Study, June 2014, Ipsos MediaCT

Research: A brand opportunity

Most travelers are undecided about which brand to book with and how brands are differentiated

Many leisure travelers go into planning **undecided on a brand**

CERTAINTY OF SPECIFIC BRAND/COMPANY TO USE
(among leisure travelers)



Base: Personal quota and component included in trip in past six months (Cruises n=614; Air travel n=1923; Car rental n=1440; Vacation packages n=1052; Lodging n=2717; Other travel n=3500). RESEARCH1: When you first begin looking for information for your personal or leisure trips, typically how certain are you about the specific company/brand you want to book with before you begin researching? (Select ONE for each component.) Source: Google Travel Study, June 2014, Ipsos MediaCT

Many leisure travelers are also **unclear about the differences** among brands

PERCEIVED DIFFERENCE AMONG BRANDS (T2B*)
(among leisure travelers)

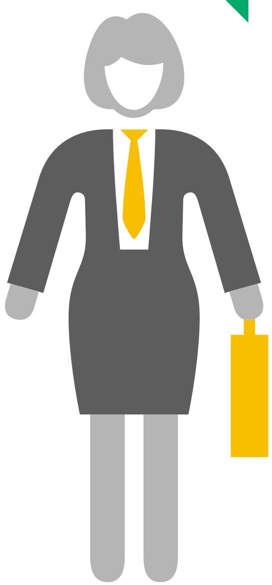
Heavy business travelers are more likely to see a difference, but not substantially more

***Top 2 box on a five-point scale:**
5 = I see a clear difference
…
1 = I see no difference

Base: Personal quota and component included in trip in past six months (Cruises n=614; Air travel n=1923; Car rental n=1440; Vacation packages n=1052; Lodging n=2717; Other travel n=3500). RESEARCH2. And, thinking beyond price, which of the following best describes your perceptions of the companies/brands providing services for each component? (Select ONE for each component.)
Source: Google Travel Study, June 2014, Ipsos MediaCT

Loyalty influence declining for business travelers, who are normally among the most loyal

I am less likely to plan business travel based on loyalty programs or points in [current year] than I was in [prior year]



2014 (C) ▶ **41%**

2013 ▶ **38%**

2012 ▶ **36%**

2 in 3 business travelers (67%) are open to trying new loyalty programs if they provide a new, different, or unique experience

Base: Business Quota (2014 n=1500; 2013 n=1500; 2012 n=1495)
Q26: Using the scale below, please indicate the extent to which you agree or disagree with each of the following statements about traveling for business purposes in the next year. (Select ONE for each statement.) Letter indicates a significant difference from comparable groupat the 95% confidence level. Only significant differences from 2014 are noted.
Source: Google Travel Study, Waves 4, 5, and 6, April to May 2012 and May to June 2013, 2014, Ipsos MediaCT

Travelers would switch to programs with **better perks and easier path to rewards**

Personal travelers	Business travelers	Affluent travelers	Reasons for switching to a different loyalty/rewards program
88%	93%	92%	Would switch for any reason (net)
54%	55%	**65%**	**Better perks**
52%	54%	**65%**	**Faster/easier to earn free flights, hotels rooms, rental cars, etc.**
31%	40%	33%	Exclusive benefits
27%	34%	36%	Larger network/multiple routes or locations
26%	34%	34%	Ability to leverage points with other specific companies/partner hotels
13%	21%	10%	Personalized recommendations either pre-trip or during trip
4%	4%	3%	Other

Base: Loyalty/reward program members (Personal n=2364, Business n=1346);
Affluent travelers who are loyalty/reward program members (n=1422)
LOY7: For which reason(s) would you switch to or try a different loyalty/rewards program? (Select ALL that apply.)
Source: Google Travel Study, May to June 2014, Ipsos MediaCT

Multi-screen activities

Travelers extend their activities from desktops and tablets to smartphones across all stages

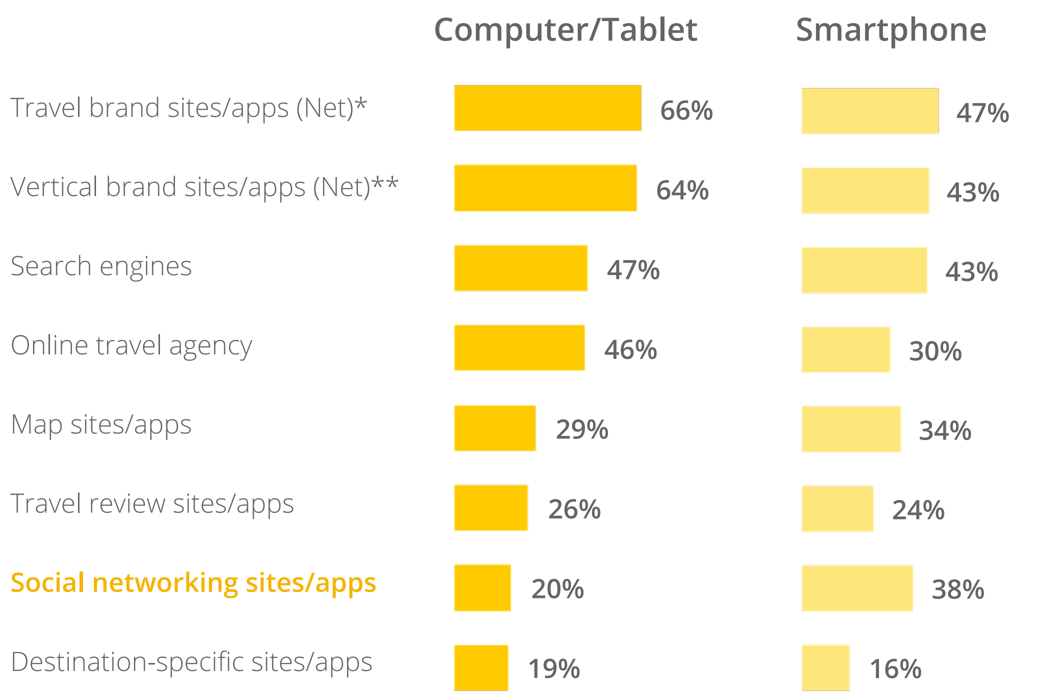
Smartphones are **used throughout the travel process**

	Leisure Travelers		Business Travelers	
	Computer/ Tablet	Smartphone	Computer/ Tablet	Smartphone
Used during any phase (Net)	94%	67%	97%	78%
Inspiration The time when you identified you wanted or needed to book travel	73%	31%	74%	39%
Research The time when you actively looked and researched your trip or travel plans	88%	27%	86%	36%
Purchase/booking The time when you booked your trip	81%	14%	84%	28%
Experiencing/traveling Any behavior you may have participated in *during* your trip	57%	50%	67%	54%
Post traveling Any behavior you may have participated in *after* you took your trip	63%	37%	67%	42%

Base: Personal quota and use device to access the internet. DEVICE0: Please think about how you typically use the Internet to gather information for your personal or leisure trips. Which device(s) do you use during each of the following phases? (Select ALL that apply for each phase.) Source: Google Travel Study, June 2014, Ipsos MediaCT
Base: Business quota and use device to access the internet. DEVICE0: Please think about how you typically use the Internet to gather information for your business trips. Which device(s) do you use during each of the following phases? (Select ALL that apply for each phase.) Source: Google Travel Study, June 2014, Ipsos MediaCT

Travelers go to the **same types of sites on smartphones** as they do on desktop/tablet … and sometimes more so

TYPES OF SITES VISITED BY TRAVELERS FROM VARIOUS DEVICES



Base: Personal quota and use device for sub-vertical planning or booking
SCREEN7: Which online sources did you access on each device to plan or book your [component]? (Select ALL that apply for each device). Source: Google Travel Study, June 2014, Ipsos MediaCT. *Travel brand sites/apps includes Vertical brand sites/apps and Tour operator sites/apps. **Vertical brand sites/apps includes Airline sites/apps, Hotel sites/apps, Car rental sites/apps, and Cruise operator sites/apps

Leisure travelers **research and book across devices,** regardless of category

	Research		Booking	
	Computer/ Tablet	Smartphone	Computer/ Tablet	Smartphone
Car rental	82%	26%	75%	20%
Air travel	89%	23%	85%	15%
Lodging	85%	26%	77%	19%
Cruises	76%	29%	72%	25%
Vacation packages	80%	26%	76%	21%
Other travel	75%	22%	65%	15%

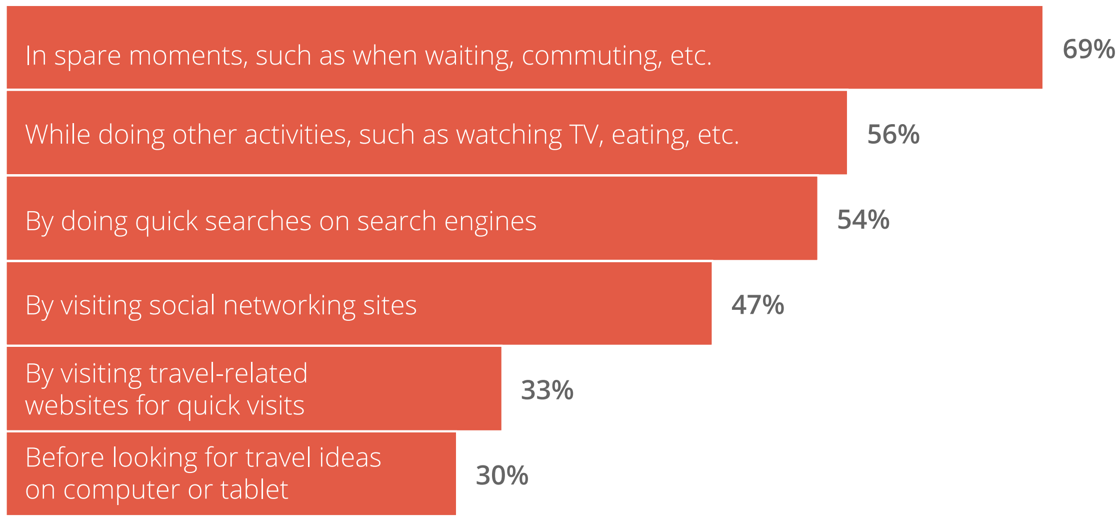
Base: Travel component included in personal trips in past six months and use device to access the Internet (floating)
SCREEN1: How have you researched each of the following trip components while planning the trips you took in the past 6 months?
Base: Travel component included in personal trips in past 6 months and use device to access the Internet (floating)
SCREEN2: And, how have you booked each of the following trip components that were part of the trips you took in the past 6 months? (Select ALL that apply for each component) Source: Google Travel Study, June 2014, Ipsos MediaCT

Cross-device movements

Early actions on mobile influence booking decisions

Smartphones are often used for travel inspiration in **“snacking moments” before planning**

USAGE OF SMARTPHONE TO INSPIRE LEISURE TRAVEL

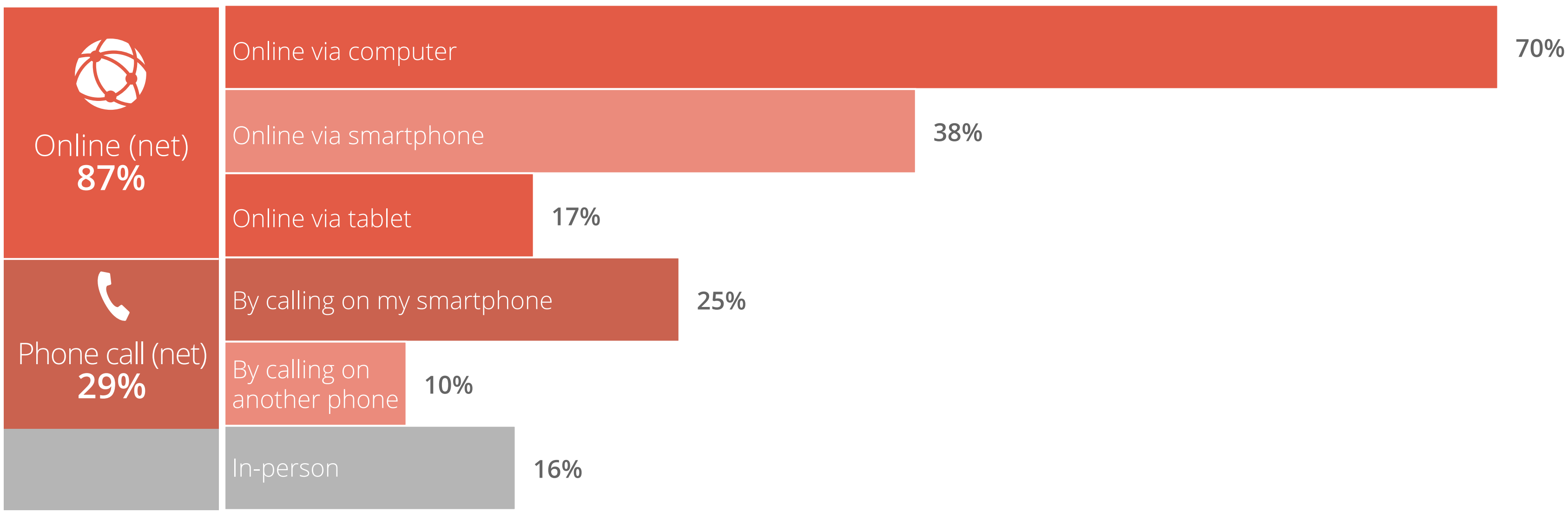


77% Usage of smartphone for travel inspiration in spare moments, such as when waiting, commuting, etc. by affluent travelers

Base: Personal quota and use smartphone during Inspiration phase (n=707) and Base: Affluent travelers who use smartphone during Inspiration phase (n=348)
INSPIRE2: You mentioned that you typically use your smartphone to access the Internet during the Inspiration phase. Which of the following, if any, describe how you use your smartphone when you are seeking inspiration for your personal or leisure trips? Do you typically look for travel ideas on your smartphone...? (Select ALL that apply.)
Source: Google Travel Study, June 2014, Ipsos MediaCT

Nearly half of those who use their smartphone for leisure travel inspiration **ultimately book through some other method**

BOOKING METHODS AFTER USING SMARTPHONE FOR LEISURE TRAVEL INSPIRATION

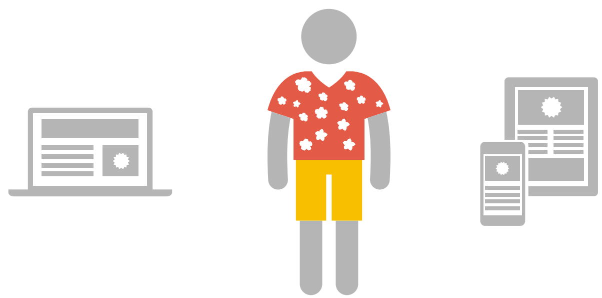


48% Ultimately book *another way*

47% of affluent travelers book *another way*

Base: Personal quota and use smartphone during Inspiration phase (n=707); Affluent travelers who use smartphone during Inspiration phase (n=348) INSPIRE3: And, when you have used your smartphone to seek inspiration, how have you ultimately booked components of those personal or leisure trips? (Select ALL that apply.)
Source: Google Travel Study, June 2014, Ipsos MediaCT

Leisure travelers **switch between devices** for a variety of activities



Sequential device activities for travel planning/booking

(among leisure travelers who use devices for sub-vertical planning or booking and engage in a specific activity)

55%
Pricing/discount/ points (net)

51%
Looked up maps or directions

50%
Browsed/looked for destinations to visit or vacation ideas

46%
Looked up a restaurant/ hotel/attraction at my destination

46%
Looked up my booking or itinerary information

Base: Quota group among personal travelers who ever did sequential and engaged in specific online activity (floating bases)
SCREEN13: Which of the following activities related to your [component], if any, did you start on one device and continue or finish on another device? (Select ALL that apply.) Source: Google Travel Study, June 2014, Ipsos MediaCT.

Across categories, 75% of leisure travelers **switch between devices to plan or book**

SEQUENTIAL DEVICE USAGE FOR TRAVEL
(among leisure travelers who use devices for sub-vertical planning or booking)

	Any	Car rental	Airline	Lodging	Cruise	Vacation packages
Ever (Net)	75%	74%	71%	71%	90%	87%
Always	11%	10%	8%	8%	27%	14%
Frequently	21%	17%	19%	17%	36%	29%
Sometimes	27%	28%	26%	26%	17%	32%
Rarely	17%	19%	18%	20%	10%	12%
Never	25%	26%	29%	29%	10%	13%

87% of business travelers switch between devices to conduct the same travel-related activity

Base: Quota group among personal travelers who use devices for sub-vertical planning or booking and Base: Business travelers who use devices for sub-vertical planning or booking
SCREEN12: When planning for your [component] in the past 6 months, how often did you start a travel-related activity or task (e.g., read reviews, watch videos, look for pricing information) on one device, but continue it or finish it at a later time on a different device?
Source: Google Travel Study, June 2014, Ipsos MediaCT

Leisure travelers most commonly switch **between devices through search**

METHOD OF MOVING BETWEEN DEVICES FOR SEQUENTIAL USAGE
(among leisure travelers who ever did sequential for component)

	Any
Conduct a search on another device	**39%**
Navigate directly to the destination site (using a web browser or an app)	**35%**
Send an email/link to myself	**34%**
Save bookmarks, shopping cart, or favorites in my account	**22%**
Sync to an online service (such as Dropbox, Google Docs)	**7%**
Other	**10%**

Base: Personal travelers who ever did sequential for component (n=2106). "Any" refers to any component
SCREEN14: You mentioned that you have started [component]-related activities on one device and then continued them on another device. In what ways did you "move" between devices? (Select ALL that apply.)
Source: Google Travel Study, June 2014, Ipsos MediaCT

Mobile sites vs. apps

Travelers still rely heavily on both, and encountering a poor site experience results in a negative impact on a brand and the bottom line

More leisure travelers book via mobile websites, while business travelers mostly book via apps—**both are still key**

METHOD OF BOOKING ON SMARTPHONE *(among those who booked on the device)*	Leisure Travelers	Business Travelers
Online (Net)	71%	86%
Via the **website** using a browser	45%	55%
Used mobile **apps** (applications)	40%	63%
Phone call	44%	44%

Base: Travelers who booked using a smartphone (Personal n=280; Business n=310)
SCREEN15: Earlier, you indicated that you have booked on your smartphone for your [component]. Specifically, what methods have you used to book on your smartphone? (Select ALL that apply.)
Source: Google Travel Study, June 2014, Ipsos MediaCT

One in five leisure travelers downloaded a travel-related smartphone app due to a **poor mobile site experience**

78%

of leisure travelers have downloaded/used a travel-related smartphone app

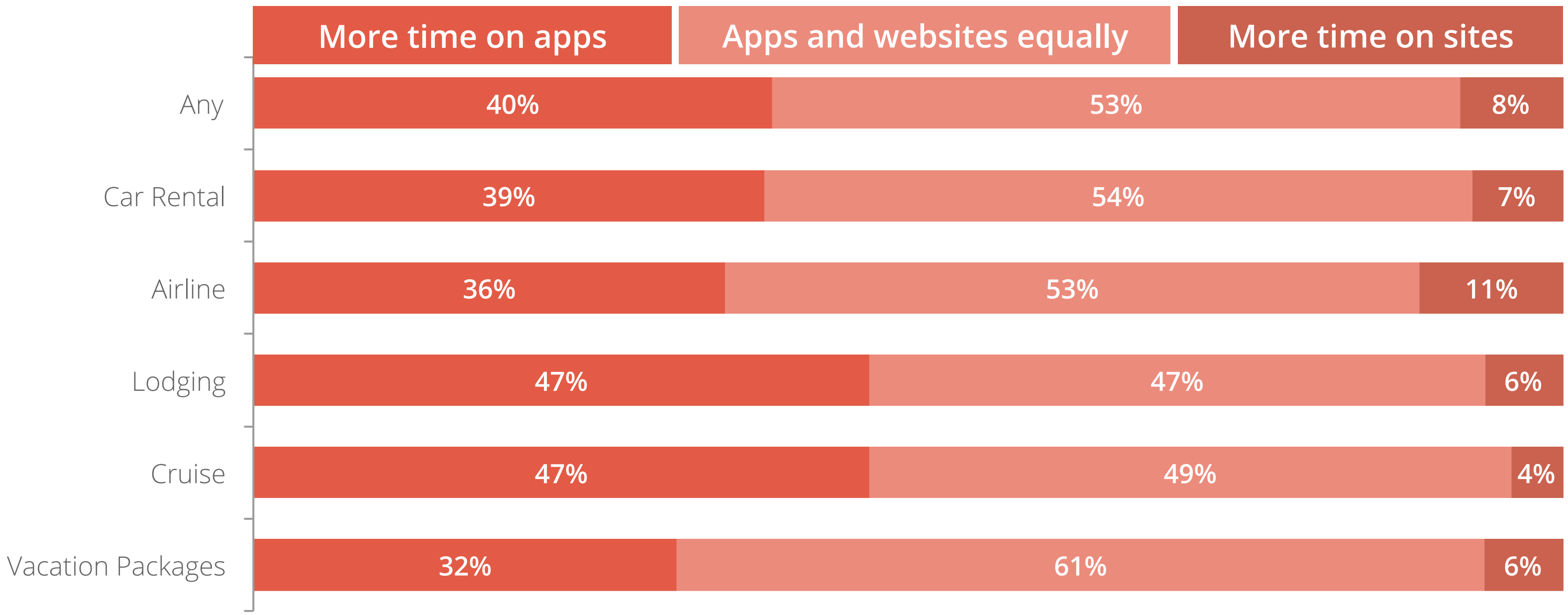
REASONS FOR DOWNLOADING/USING TRAVEL-RELATED SMARTPHONE APPS
(among Leisure Travelers who **downloaded/used a travel-related app** on their smartphone)

	Any
Better than mobile site (Net)	**53%**
Easier to reserve or book than on mobile site	**42%**
Mobile site for the brand not meeting needs	**20%**
To save personal information/setting	**39%**
Plan to access information from the brand frequently	**37%**
For a brand with which I have rewards/loyalty membership	**36%**
Recommendations from friends, family, or colleagues	**31%**
Ratings/Recommendation in an app store	**28%**

Base: Personal travelers who accessed online sources on smartphone (n=507). Personal travelers who have downloaded/used travel-related smartphone apps (n=396). SCREEN8: For which reason(s) have you downloaded or used travel-related smartphone apps for your [component] trips? (Select ALL that apply.)
Source: Google Travel Study, June 2014, Ipsos MediaCT

Even after they download travel apps, travelers **still use sites**

TRAVELER TIME SPENT: SITE V. APP
(among Leisure Travelers who downloaded/used a travel-related app on smartphone)



Base: Quota group among personal travelers who downloaded/used an app on the smartphone (Any n=396, Car rental n=41*; Airline n=74; Lodging n=79; ; Cruises n=153; Vacation packages n=109)
*Caution: Small sample size (n<50)
SCREEN9: After you downloaded a travel-related app for your [component], did you typically...? (Select ONE.)
Source: Google Travel Study, June 2014, Ipsos MediaCT

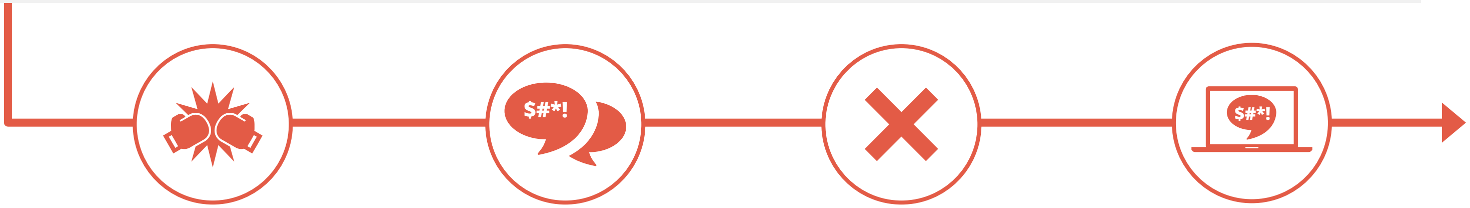
83% of leisure travelers have encountered a travel site that was not mobile optimized or friendly

Only **23%** of those who have encountered a mobile site that wasn't optimized actually pushed through

Base: Personal travelers who accessed online sources on smartphone; (n=507) ; Personal travelers who accessed a site that was not mobile optimized or friendly (n=423) SCREEN10: Which of the following, if any, have you done after trying to access a travel site that was not optimized for mobile or was not mobile-friendly when planning or booking your [component]? (Select ALL that apply.)
Source: Google Travel Study, June 2014, Ipsos MediaCT.

A poor mobile experience forces travelers to **move elsewhere** … and has a negative impact on brand

Connected with brand a different way (Net)	**68%**
Accessed the same site on computer or tablet	**51%**
Looked to see if the site's brand had a downloadable app	**27%**
Called the site/company	**17%**
Negative impact on brand (Net)	**40%**



Use a competitor's site (20%)

Complain on social media (13%)

Stop using brand altogether (13%)

Tell friends/family (19%)

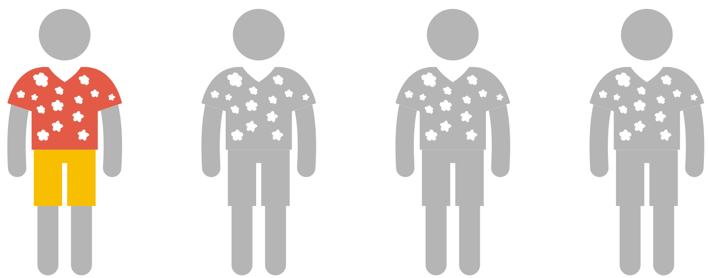
Base: Personal travelers who accessed site that was not mobile optimized or friendly (n=423); SCREEN10: Which of the following, if any, have you done after trying to access a travel site that was not optimized for mobile or was not mobile-friendly when planning or booking your [component]? (Select ALL that apply.) Source: Google Travel Study, June 2014, Ipsos MediaCT.

Mobile & in-destination

The smartphone is the go-to device for local information when traveling

Travelers often call airlines and hotels for information **from the road**

Leisure Travelers



Have you ever called an airline for more information while traveling? **28%**

Have you ever called a nearby lodging location for more information while traveling? **28%**

Business Travelers

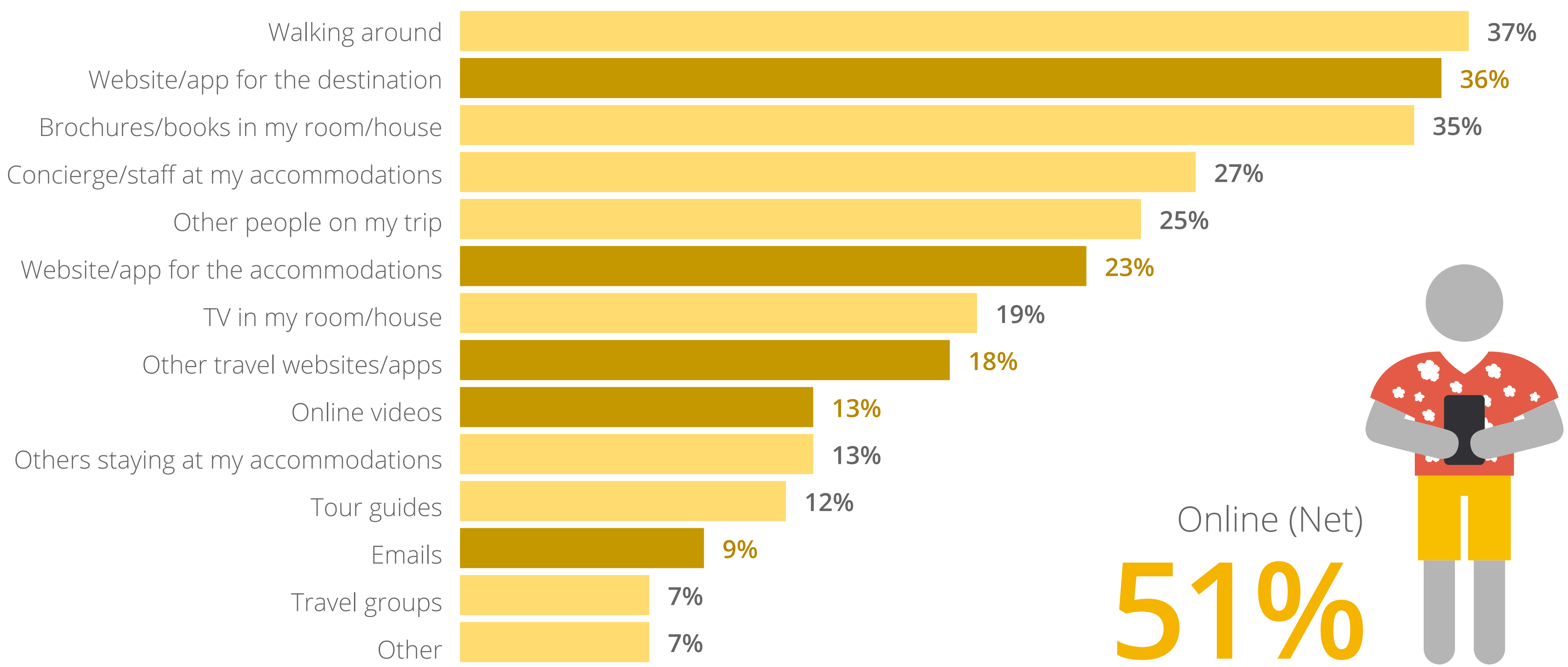
Have you ever called an airline for more information while traveling? **57%**

Have you ever called a nearby lodging location for more information while traveling? **46%**

QA11 Base: Airline quota (Personal n=606, Business n=510); QA12 Base: Airline quota and called while traveling (Personal n=167, Business n=290) QA11: While traveling, have you ever called an airline for more information? (Select ONE); QA12: When you called, which types of information, services or products have you inquired about? (Select ALL that apply.) QH11 Base: Lodging quota (Personal n=818, Business n=298); QH12 Base: Lodging quota and called while traveling (Personal n=225, Business n=136); QH11: While traveling, have you ever called a nearby location for more information? (Select ONE); QH12: When you called, which types of information, services, or products have you inquired about? (Select ALL the apply.) Source: Google Travel Study, June 2014, Ipsos MediaCT

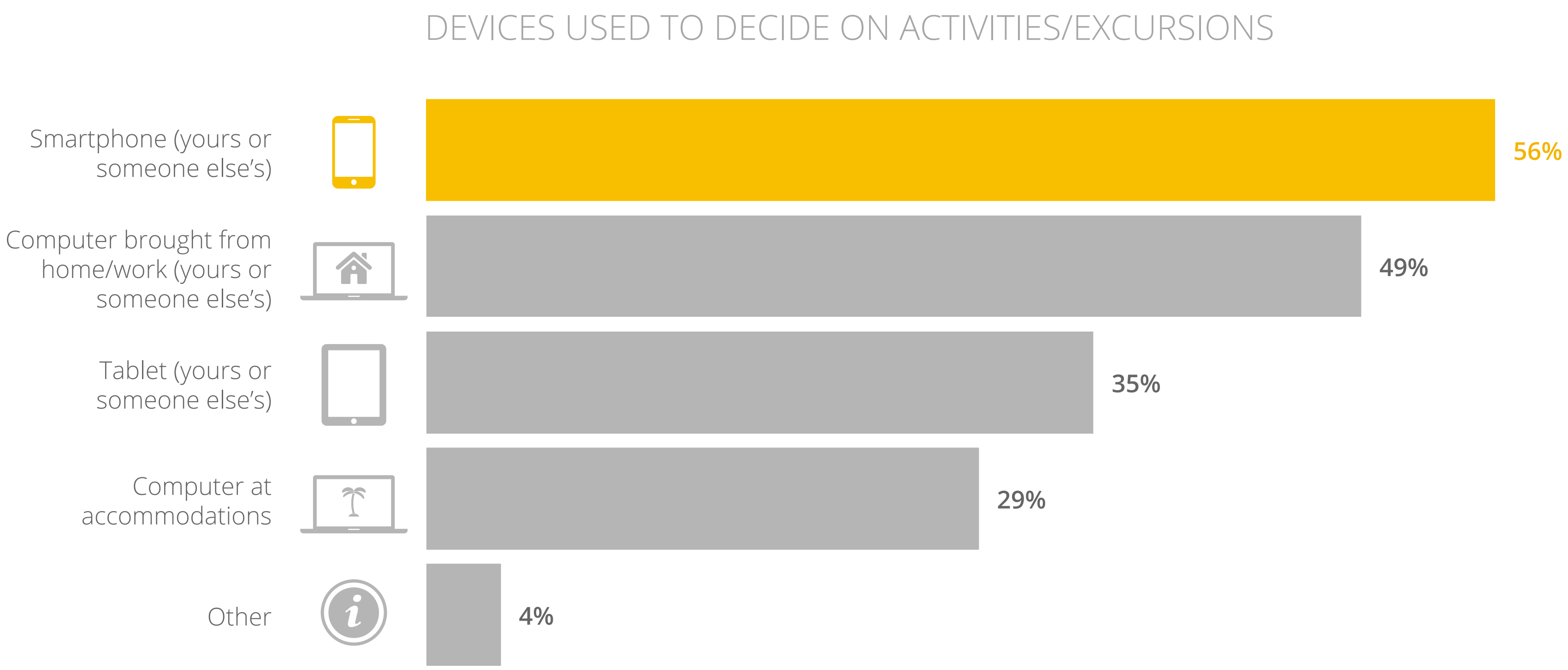
To decide on activities once at their destinations, leisure travelers rely on a **mix of sources**

SOURCES USED FOR ACTIVITIES/EXCURSIONS



Base: Personal Quota (n=3500)
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.)

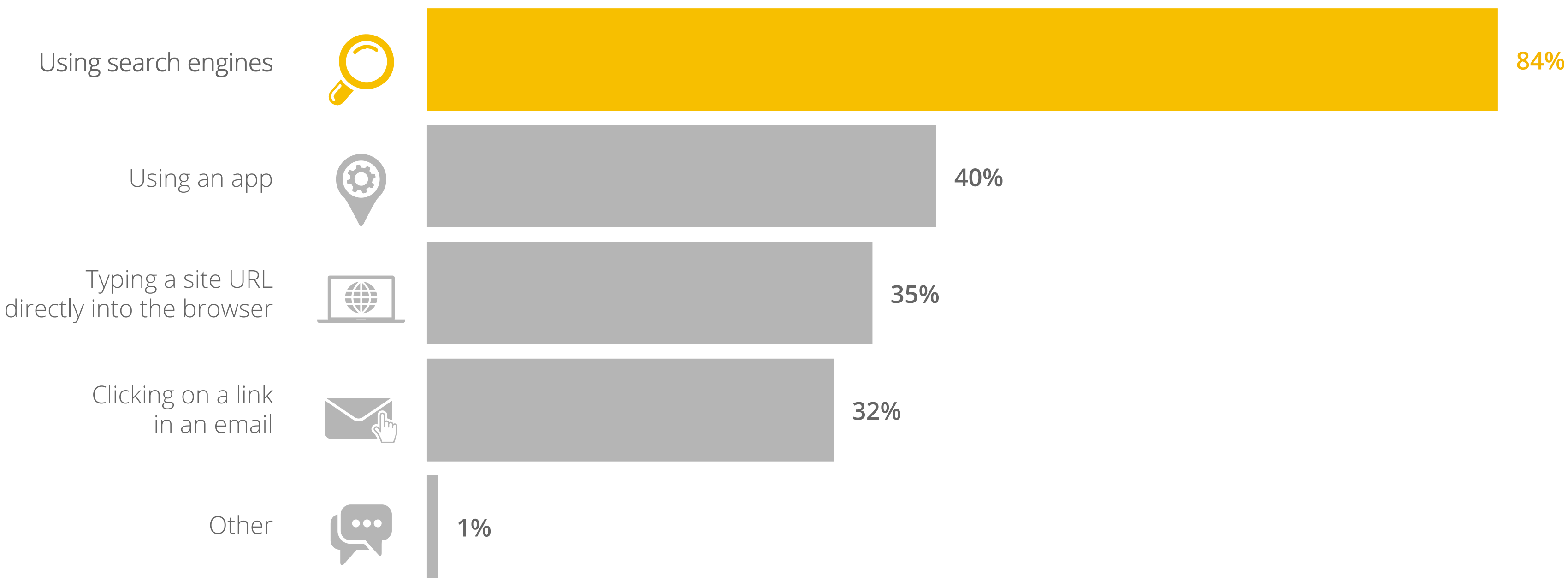
To decide on activities once at their destinations, leisure travelers **rely on smartphones the most**



Base: Personal quota using internet-related sources to decide on activities/excursions at destination (n=1801)
QD12: And, when deciding on activities/excursions to participate in once you have arrived at your destination, on which device(s) do you access the information? (Select ALL that apply.)

Leisure travelers overwhelmingly **rely on search engines via smartphones** to find local information

METHODS OF ACCESSING INFORMATION ABOUT ACTIVITIES/EXCURSIONS ON THE SMARTPHONE



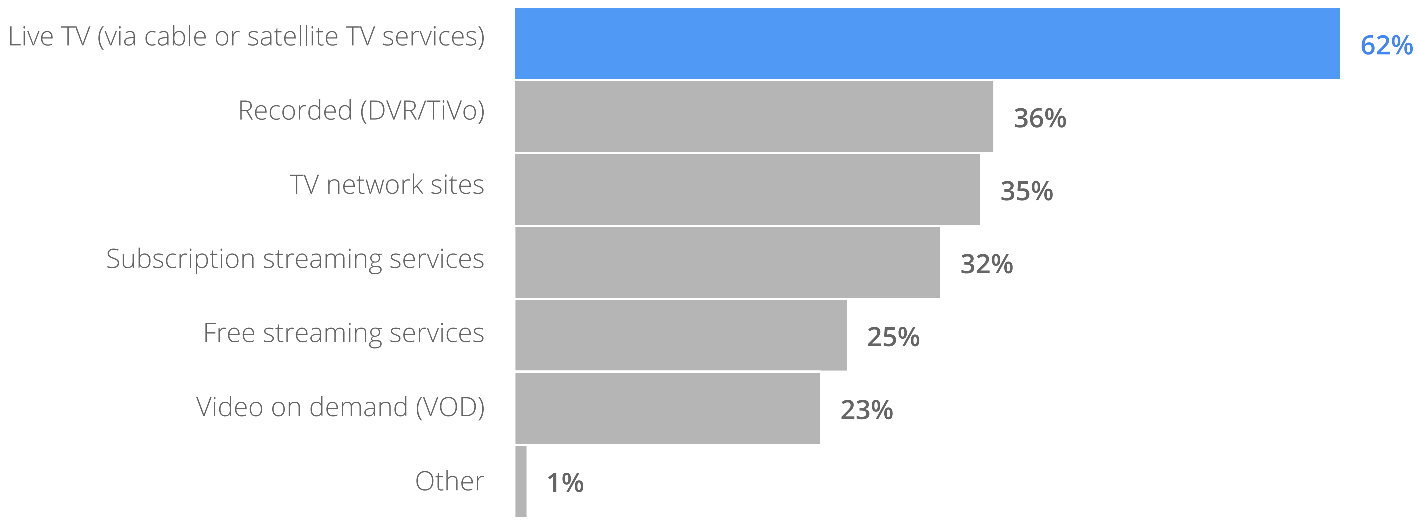
Base: Use smartphone to decide on activities/excursions at destination (n=1011)
QD13: And, when deciding on activities/excursions to participate in once you have arrived at your destination, how do you access the information on your smartphone? (Select ALL that apply.)
Source: Google Travel Study, June 2014, Ipsos MediaCT

TV viewing habits

Travelers are watching in more ways than ever before, and attention continues to fragment

One in three travelers watch their favorite programs **outside of live TV**

METHODS OF WATCHING TV



Watch TV using

Live/recorded/VOD	Streaming services/online	Streaming services
78%	58%	43%

Base: Total Respondents (n=5000)
QTV1: Generally, how do you watch your favorite TV programs? (Select ALL that apply.)
Source: Google Travel Study, June 2014, Ipsos MediaCT

Even when they watch live TV, **four in ten travelers don't watch the commercials***

ACTIVITIES DONE DURING COMMERCIAL BREAKS WHILE WATCHING TV PROGRAMS

	Live TV
Fast-forward through the commercial	**N/A**
Watch the commercial	**58%**
Leave the room to do something else (e.g., get a snack, go to the bathroom)	**52%**
Do something else in the room (e.g., eat, read, talk to someone)	**51%**
Change the channel	**42%**
Use another device (e.g., computer, tablet, smartphone)	**30%**
Mute the commercial	**25%**

Base: Watch TV programs via specified method (n=3117)
QTV2: And, what do you do when a commercial comes on while you're watching your favorite TV programs live, recorded, or on-demand? (Select ALL that apply for each way of watching TV.) Source: Google Travel Study, June 2014, Ipsos MediaCT
*Only "Watch the commercial" is included in sum for those who watched the commercial. Leave the room, Do something else, Change channel, Use another device, and Mute the commercial all contributed to "Don't watch" sum.

When given the option, most travelers **fast-forward through commercials**

ACTIVITIES DONE DURING COMMERCIAL BREAKS WHILE WATCHING TV PROGRAMS

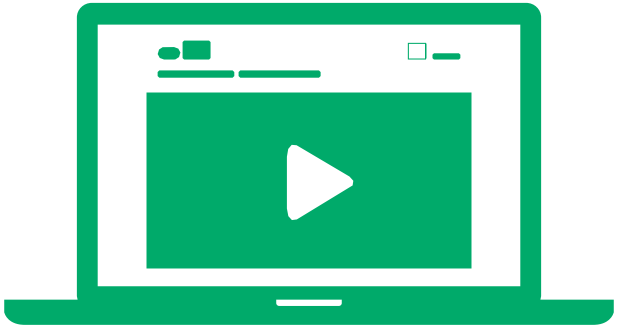
	Live TV LIVE	Recorded REC	Video on-demand VOD
Fast-forward through the commercial	N/A	78%	42%
Watch the commercial	58%	23%	39%
Leave the room to do something else (e.g., get a snack, go to the bathroom)	52%	30%	35%
Do something else in the room (e.g., eat, read, talk to someone)	51%	27%	38%
Change the channel	42%	N/A	N/A
Use another device (e.g., computer, tablet, smartphone)	30%	22%	29%
Mute the commercial	25%	17%	22%

Base: Watch TV programs via specified method (Live TV n=3117; Recorded n=1805; Video on-demand n=1141)
QTV2: And, what do you do when a commercial comes on while you're watching your favorite TV programs live, recorded, or on-demand? (Select ALL that apply for each way of watching TV.)
Source: Google Travel Study, June 2014, Ipsos MediaCT

Video: The next frontier

Travelers engage heavily with online video and watch more than just travel content

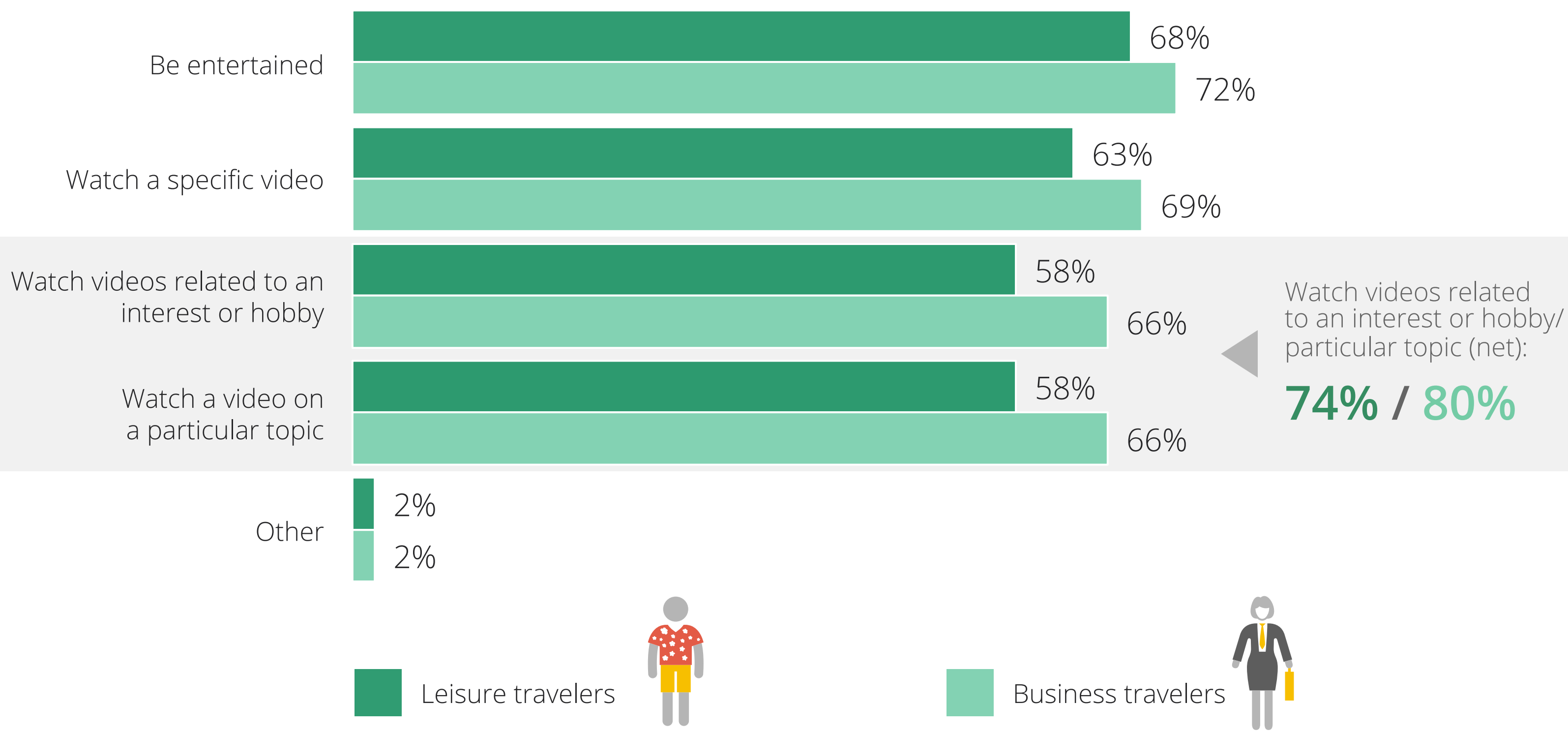
97% of travelers who watch online video did so within the last month



Base: Ever watch online videos (Personal n=3184, Business n=1436)
Q3: What types of videos have you watched on the internet in the past month?
Source: Google Travel Study, June 2014, Ipsos MediaCT

Travelers are engaged on YouTube, with three in five leisure and two in three business travelers visiting to **pursue passion points**

REASONS FOR VISITING YOUTUBE

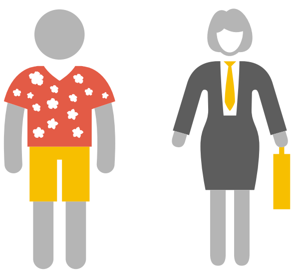


Base: Watched videos on YouTube in the past month (Personal n=2688, Business n=1214)
VIDEO1: For which reason(s) do you visit YouTube? (Select ALL that apply.)
Source: Google Travel Study, June 2014, Ipsos MediaCT

Travelers who watch online video most commonly watch **music, TV shows, and movie clip/trailer videos**

97%*

Leisure/business travelers watched videos in the past month (net)



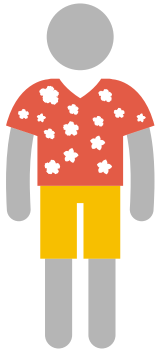
TOP 10 TYPES OF VIDEOS WATCHED ONLINE IN PAST MONTH
(among those who ever watch online video)

Music	**50%**	Full-length movies	**43%**
Full-length TV shows	**50%**	Food	**42%**
Movie clips and trailers	**49%**	Sports	**35%**
Humor	**46%**	Weather	**34%**
News	**45%**	Celebrity	**34%**

*Base: weighted average of Personal and Business Travelers
Base: Ever watch online videos (Personal n=3184, Business n=1436)
Q3: What types of videos have you watched on the Internet in the past month?
Source: Google Travel Study, June 2014, Ipsos MediaCT

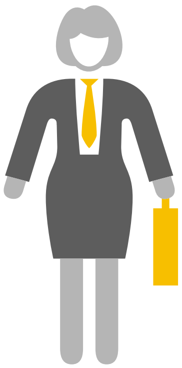
35%

Leisure Travelers



56%

Business Travelers



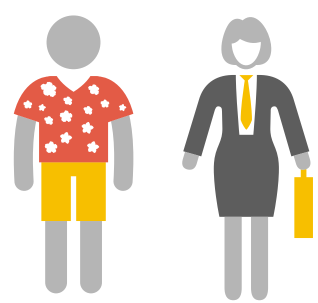
Engaged in travel-related video activities within the past six months

Base: Ever watch online video (Personal n=3184, Business n=1436)
Q4: Which of the following have you done online in the past six months? (Select ALL that apply.)
Source: Google Travel Study, June 2014, Ipsos MediaCT

Online videos are viewed throughout the travel journey, particularly **before decisions are made**

WHEN TRAVEL VIDEOS ARE VIEWED
(Among leisure and business travelers who watched/commented on travel-related video)

- **66%** When thinking about taking a trip
- **52%** When thinking about what type of trip to take
- **65%** When choosing a destination
- **63%** When looking for ideas of activities to do at a particular destination
- **54%** When deciding on accommodations at a particular destination
- **37%** When deciding which website to book on



Base: Watched/commented on travel-related video (Personal n=1239, Business n=860)
Q5: At what points in your travel planning process do you view videos online? (Select ALL that apply.)
Source: Google Travel Study, June 2014, Ipsos MediaCT

Online videos from brands are viewed by **more than half of travelers**

Types of travel videos viewed
(among those who watched/commented on travel-related video)

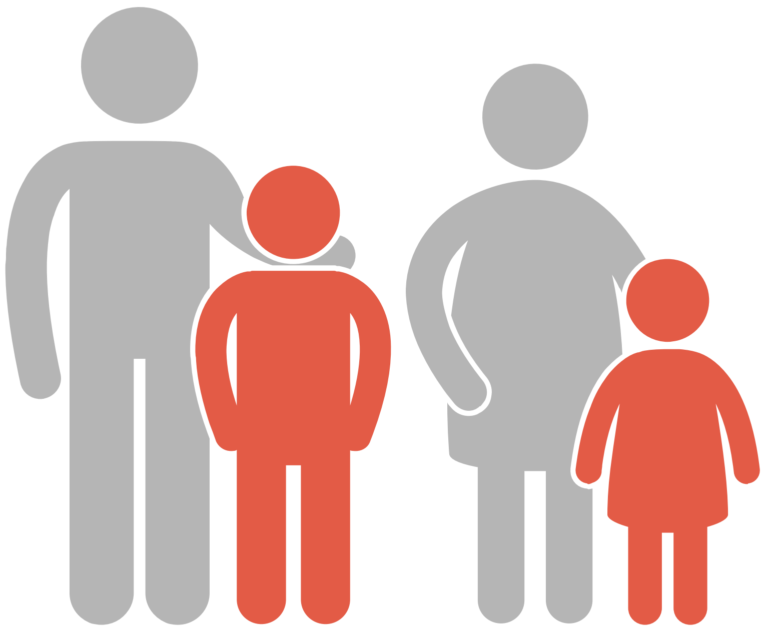
Leisure Travelers	Type	Business Travelers
55%	Trip reviews from people like me	60%
55%	Trip reviews from experts	61%
54%	Videos from travel-related channels	65%
53%	Videos from hotels, airlines, cruises, tours, etc.	64%
49%	Videos made by people like me	56%
37%	Commercials or ads from companies or brands	49%
34%	Videos made by friends and family	47%
3%	Other	2%

Base: Watched/commented on travel-related video (Personal n=1239, Business n=860)
Q6B: Specifically, what types of travel-related videos do you watch online? (Select ALL that apply.)
Source: Google Travel Study, June 2014, Ipsos MediaCT

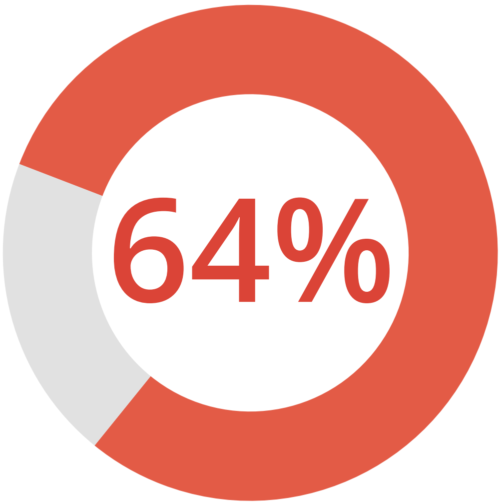
Family travel

Children’s preferences influence decision making

A majority of families take **at least two trips together per year**



Travelers who take two or more family trips per year

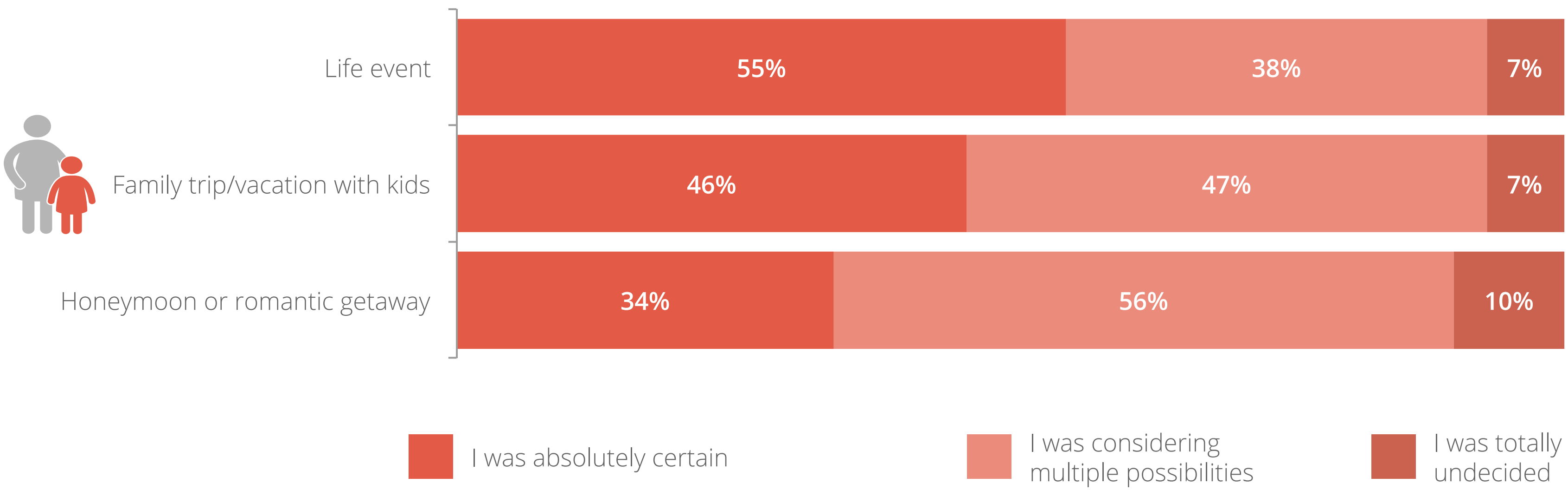


45% of leisure travelers plan to travel more frequently with their family in the coming year

Source: Google Consumer Surveys, May 2014 and Google Travel Study, June 2014, Ipsos MediaCT
Base: Personal travelers who take trips with kids (n=1016)
Q23: Using the scale below, please indicate the extent to which 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.)

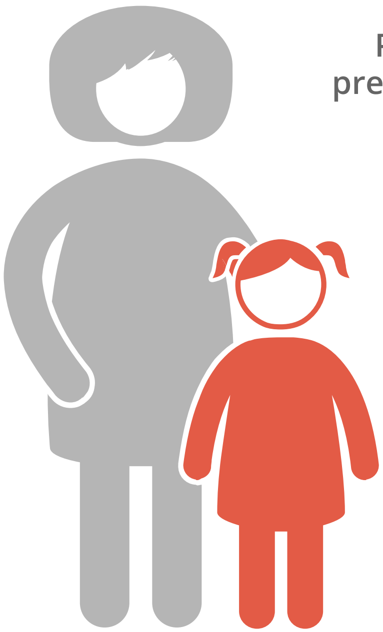
Many are undecided when they **begin planning family trips**

CERTAINTY OF DESTINATION AT THE BEGINNING OF LEISURE TRAVEL PLANNING

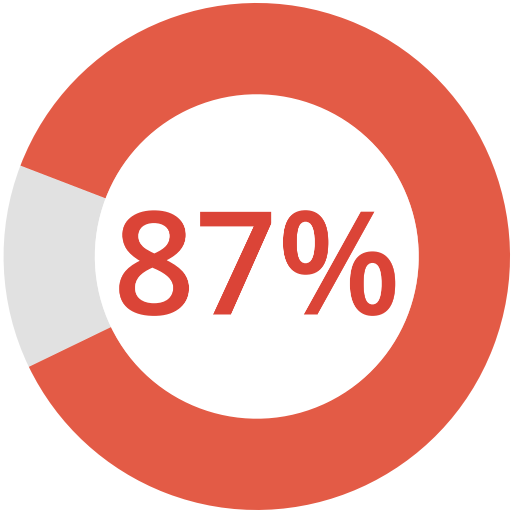


Base: Personal quota and took specific types of personal trips (Go on a family trip/vacation with kids n=1147; Go on a honeymoon or romantic getaway n=486; Celebrate a life event n=641).
LEISURE2: When you first began planning each of the following personal or leisure trips you took in the past six months, typically how certain were you about where you would go? (Select one for each.)
Source: Google Travel Study, June 2014, Ipsos MediaCT

From a young age, children play an influential role in **family travel destination decisions**



Percentage of times at which children's preferences influence family travel decisions

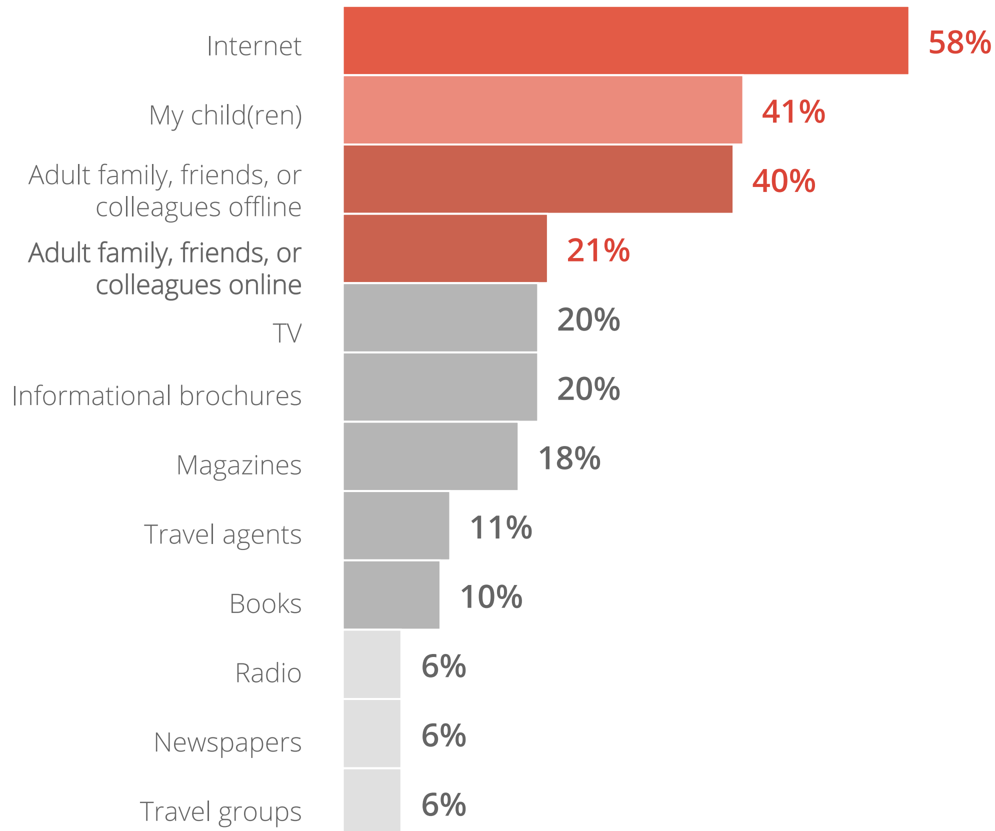


8 Years Mean age at which children's preferences influence decisions

Base: Personal quota and take family trips with kids (n=1016).
QF2: At what age did your child(ren)'s preferences start influencing your family travel decisions (e.g., where to go, where to stay, what to do once there), if at all?
Source: Google Travel Study, June 2014, Ipsos MediaCT

Online sources play a critical role in **family travel planning**

SOURCES USED TO HELP DETERMINE FAMILY TRIPS OR VACATIONS WITH KIDS



Base: Personal quota and take family trips with kids (n=1016)
QF1: Earlier you mentioned that you have kids under age 18 in your household. Which of the following sources, if any, do you typically use to decide where to go for your family trips or vacations with kids? (Select ALL that apply.)
Source: Google Travel Study, June 2014, Ipsos MediaCT

Key Takeaways

Digital is the primary source of travel inspiration: 65% of leisure travelers are inspired by online sources, most notably through social/video sites and search, while 42% of travelers are inspired to travel by YouTube content.

At the onset of planning, travelers increasingly turn to search first: The most notable year-on-year increases in travelers starting with search were exhibited with car rentals and accommodations. Travelers use a variety of search terms (both branded and nonbranded) throughout the research process.

The research phase is a clear branding opportunity for marketers: A majority of leisure and business bookers consider multiple brands when researching (regardless of category).

Mobile is critical at all stages and influences booking decisions: Smartphones are used throughout the travel process, including for inspiration during "snackable moments." Nearly half of those who use their smartphone for leisure travel inspiration ultimately book through another method/device. Only 23% of those who encounter a non-mobile-optimized site actually push through to complete their activity.

TV viewing habits continue to fragment, and video is key for inspiration and planning: One in three travelers (38%) watch television outside of live programming; when given the option, most fast-forward through commercials. Conversely, 66% of travelers watch online travel videos when they're thinking about taking a trip, and 65% watch when they're choosing a destination.

Family trip planners are up for grabs: Half of travelers are not set on a destination at the onset of planning. 45% plan to travel more with family in the coming year and often take children's preferences into account.

Source: Google Travel Study, June 2014, Ipsos MediaCT