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2010 Air Traveler's Road to Decision

The Role of Digital on Airline Travelers

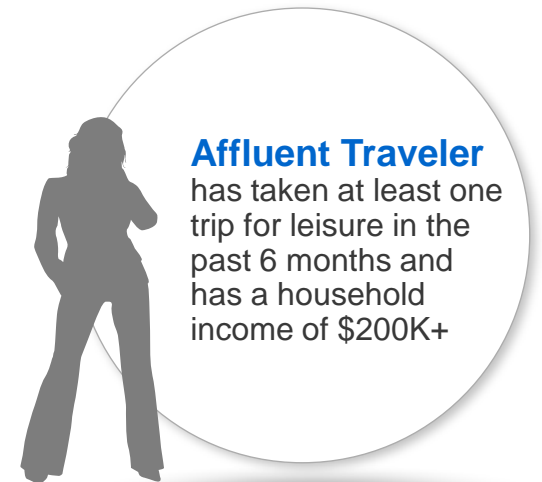
Google/OTX

U.S., September 2010

Research Methodology

- Category Covered: Airline
- Survey of 5,000 travelers
- An augment of 1,500 affluent personal travelers was also recruited
- Partnered with OTX; interviews conducted 4/10 – 4/27

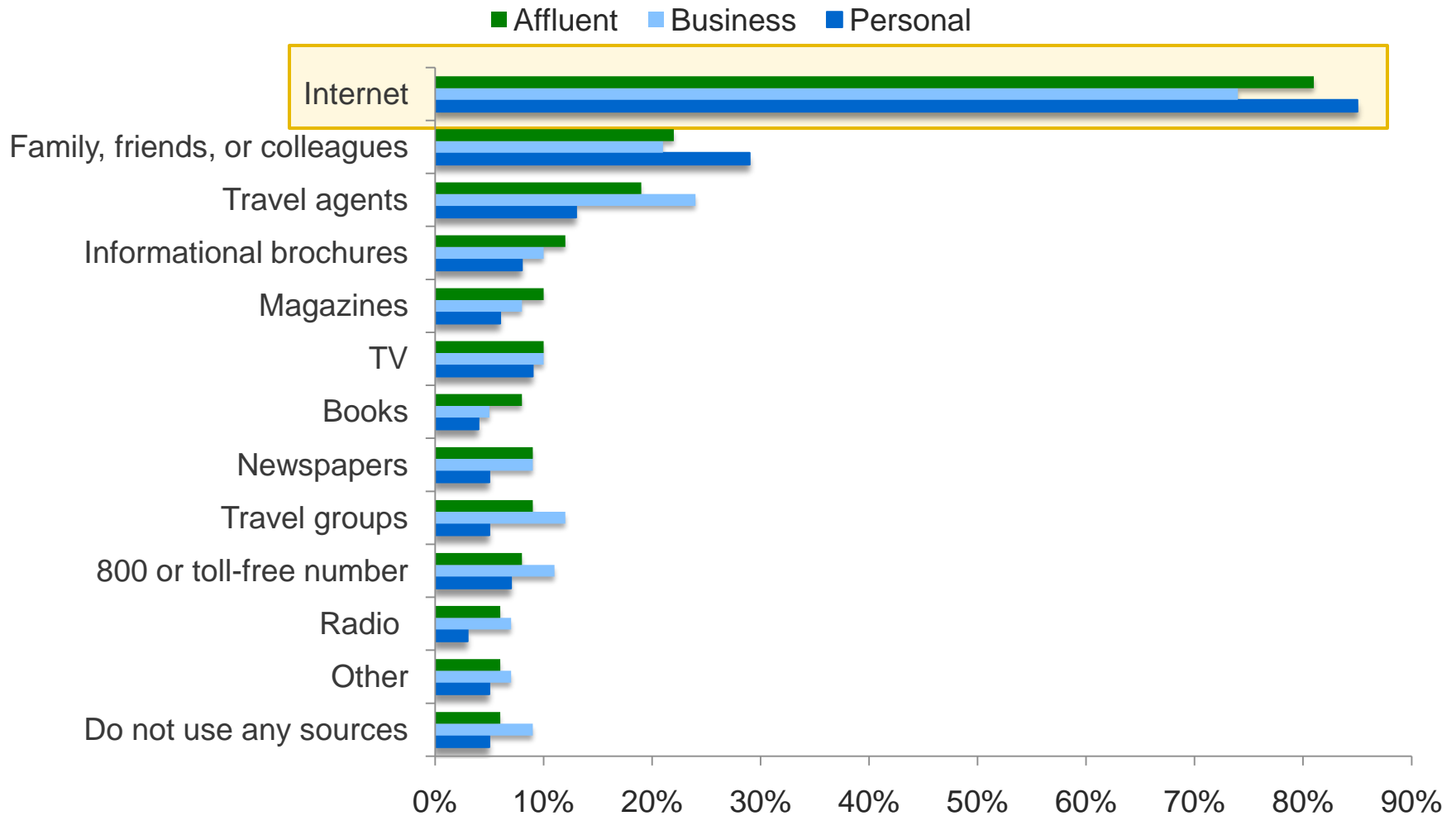
Traveler Types Defined



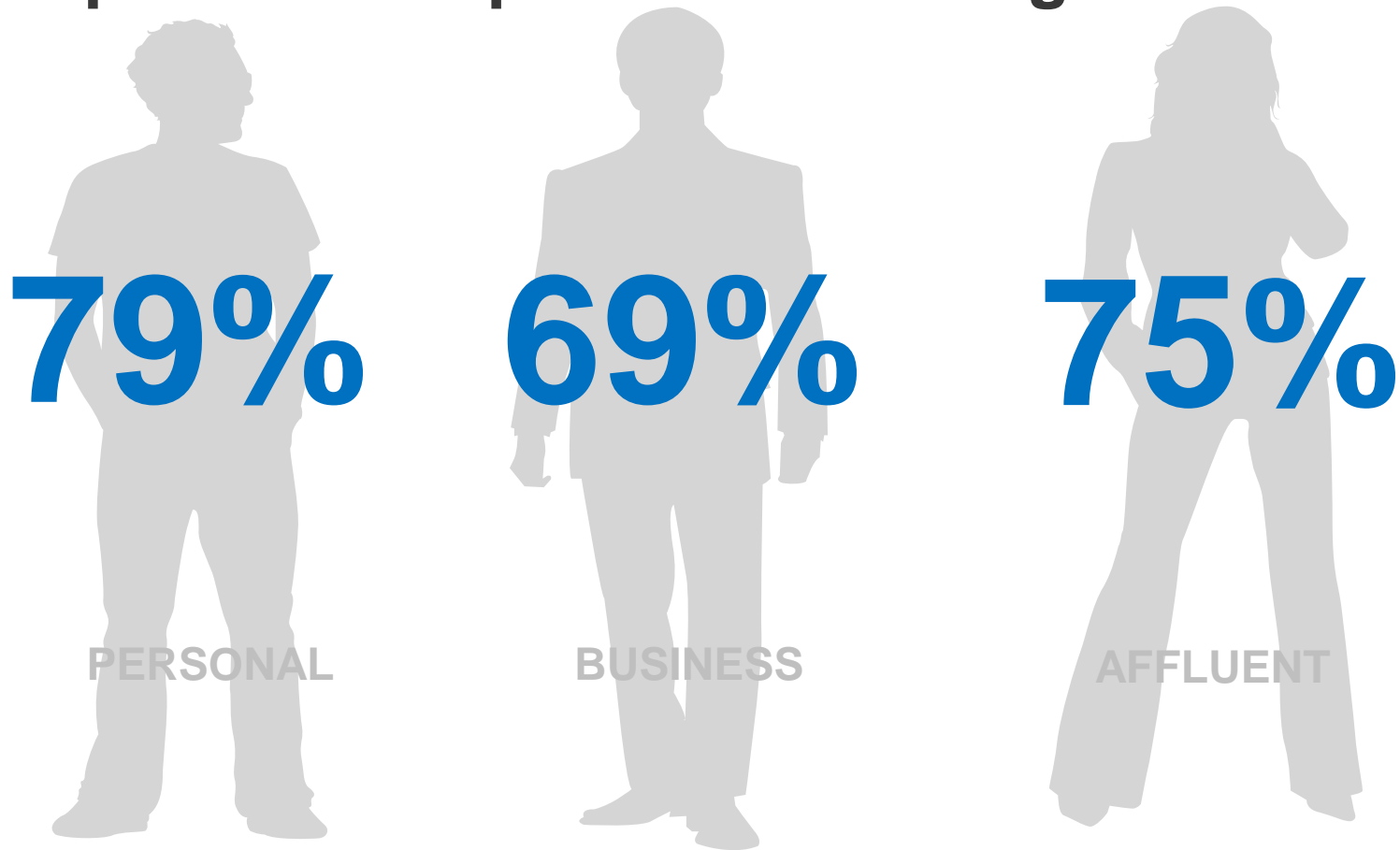
Key Findings

- 1** The Internet continues to be the dominant tool for researching air travel.
- 2** People are still most likely to go direct to an airline's website to book flights, especially wealthier travelers.
- 3** Comparison shopping for flights is commonplace, even among wealthy travelers. Expedia, Travelocity and Orbitz are used most often.
- 4** Price and flight convenience are the top considerations for bookers. Affluent travelers are much more price sensitive compared to last year.
- 5** The majority of travelers check in for flights online to save time, especially business and affluent travelers.
- 6** Southwest, Delta and American Airlines are the favorite airlines for travelers across all segments.
- 7** Personal travelers show the least brand preference and affinity. Business and affluent travelers, while not as interested in saving travel miles, have been more prone in 2009 to book with the same airline.

The Internet Dominates as the Top Choice for Airline Research, Business Travelers Rely on a Number of Other Sources like Travel Agents



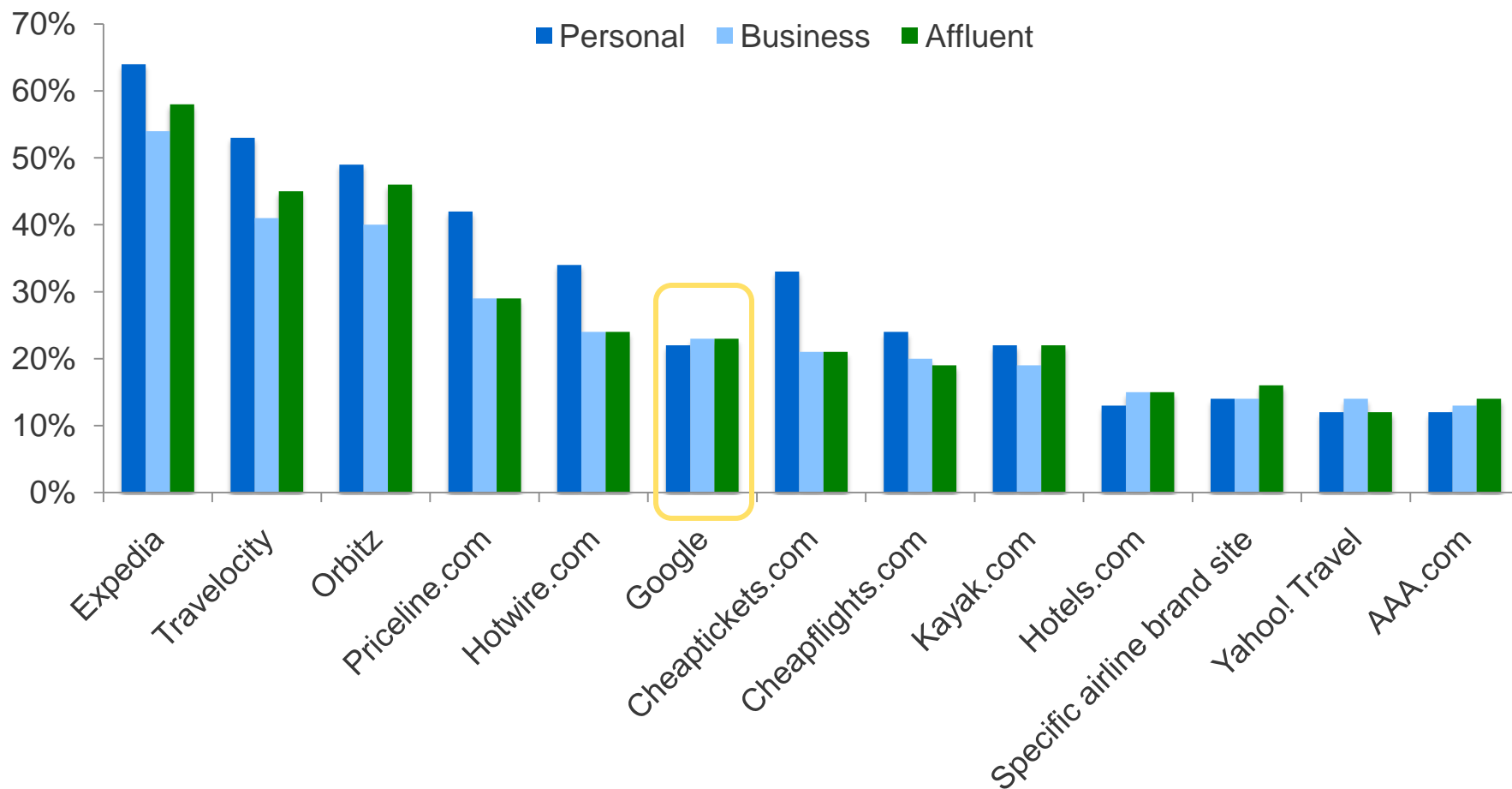
The Majority of Consumers Go Online to Comparison Shop Before Booking



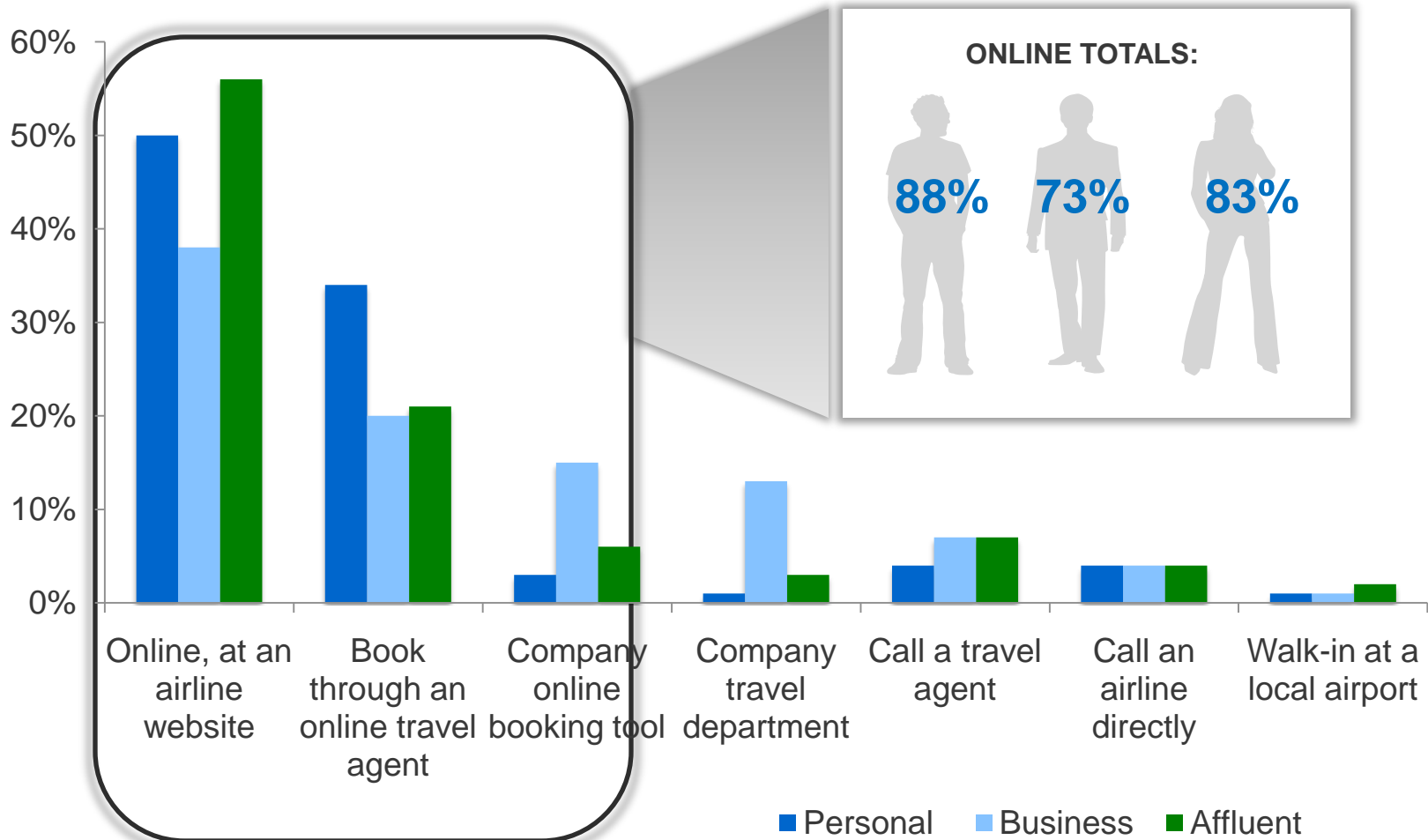
Ensure strong awareness online: be prepared with coverage on generic terms and a tailored remarketing strategy.

1 Out of 4 Comparison Shop with Google

- Most comparison shopping takes place on Expedia, Travelocity and Orbitz
- Across all segments one in four travelers uses Google to compare prices



When it Comes to Booking, Online is the Preferred Method Across All Segments



Price is the Key Deciding Factor When Choosing Which Airline to Book

The affluent value convenience and efficiency twice as much as the personal traveler

1. Price (70%)

2. Most convenient timing (41%)
3. Fewer stops, better connections (41%)
4. Past Experience
5. Airport location

PERSONAL

1. Price (51%)

2. Most convenient times (49%)
3. Fewer stops, better connections (44%)
4. Past experience
5. Airport location

BUSINESS

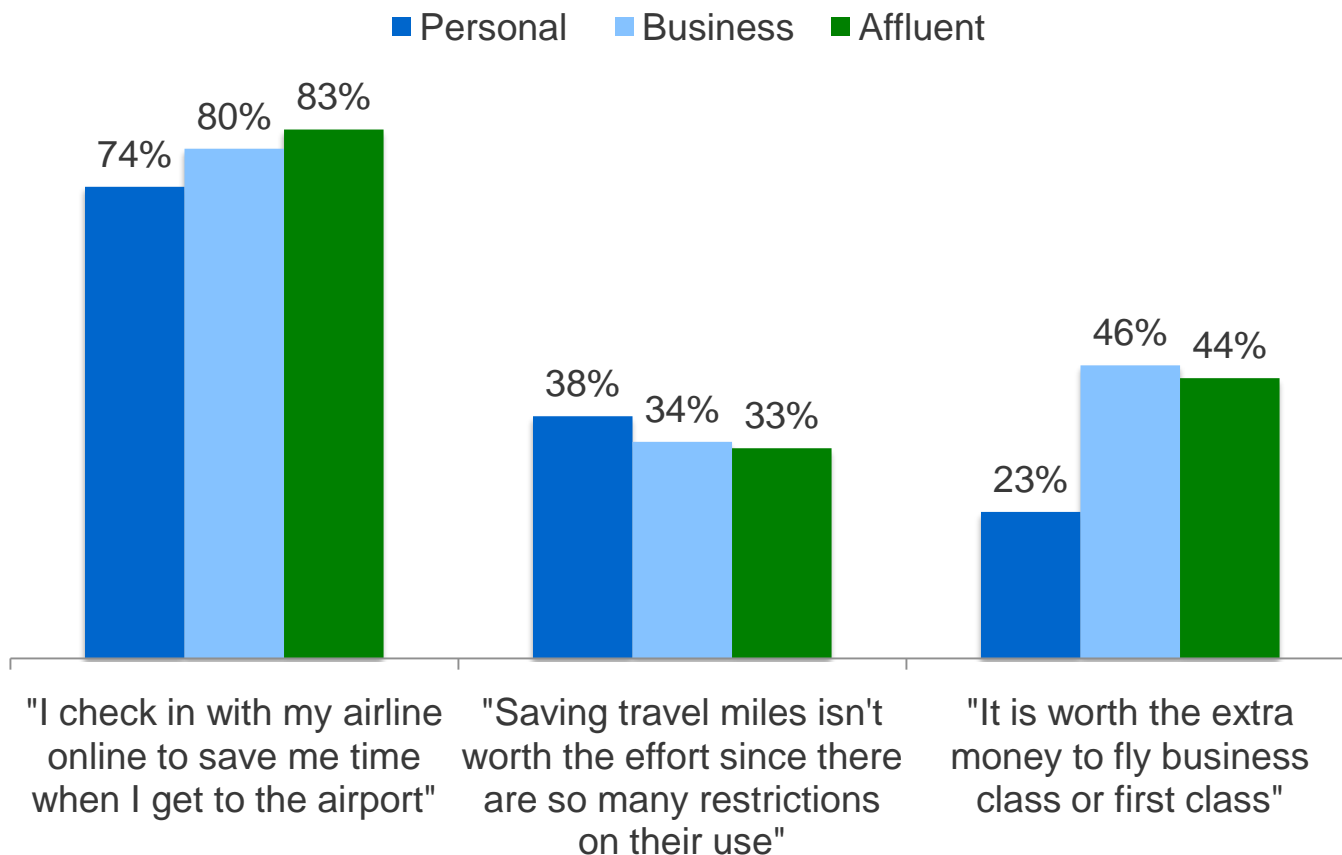
1. Price (83%)

2. Fewer stops, better connections (83%)
3. Most convenient timing (82%)
4. Past Experience
5. Airport location

AFFLUENT

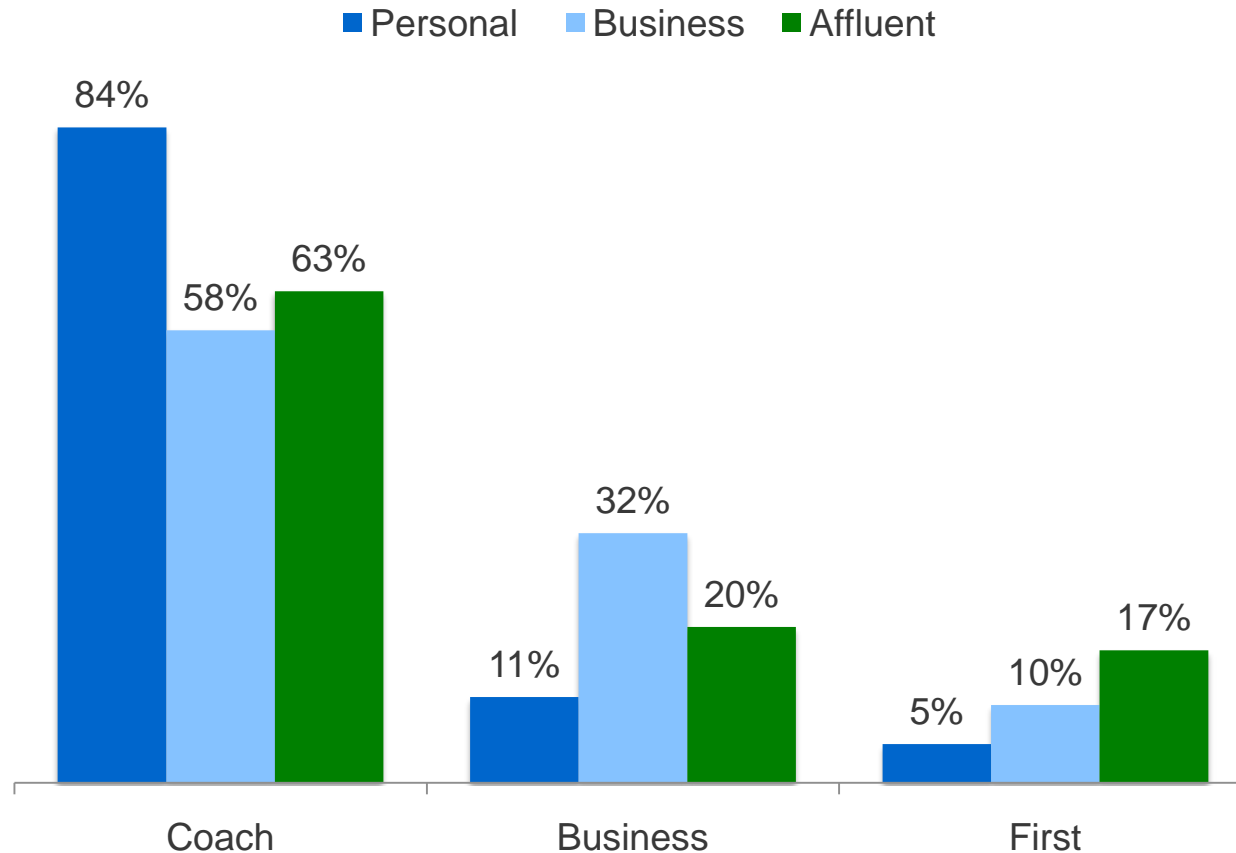
Create messaging to highlight convenience and efficiency in addition to competitive price points.

Most Travelers (More So Among Business and Affluent) Check In Online to Save Time



Make it convenient for consumers to check in online including via mobile.

Not Surprisingly, Flying First or Business Class is More Prevalent Among Affluent Vacationers Than General Travelers



Ensure strong presence on premium, affluent sites on the Google Display Network.

The Airline Space is Highly Fragmented

	Personal	Business	Affluent
Southwest	26%	29%	24%
Delta	25%	44%	36%
American	23%	36%	33%
United	16%	33%	25%
US Air	13%	24%	20%
Continental	11%	17%	16%
JetBlue	9%	13%	11%
Northwest	6%	11%	8%
AirTran	6%	8%	7%
British Airways	2%	7%	5%
Air Canada	1%	7%	6%

American Airlines slipped in percentages to #3 from 2009

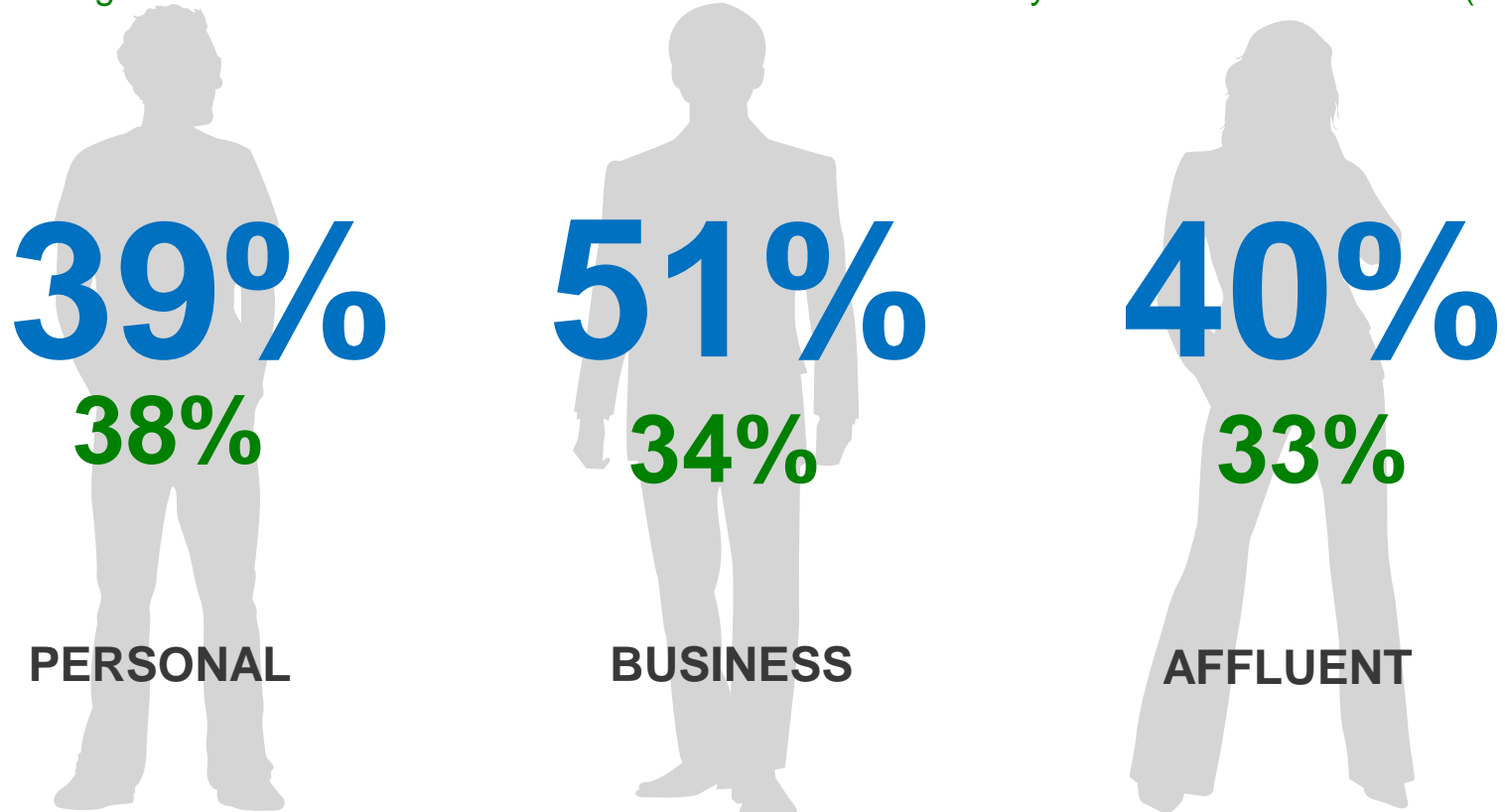
= most used

Branding campaigns can help capture your desired consumer segment and differentiate you from the pack.

Personal Travelers Show the Least Brand Preference and Affinity

“I started booking with the same airline more frequently in 2009 than I had in recent years”

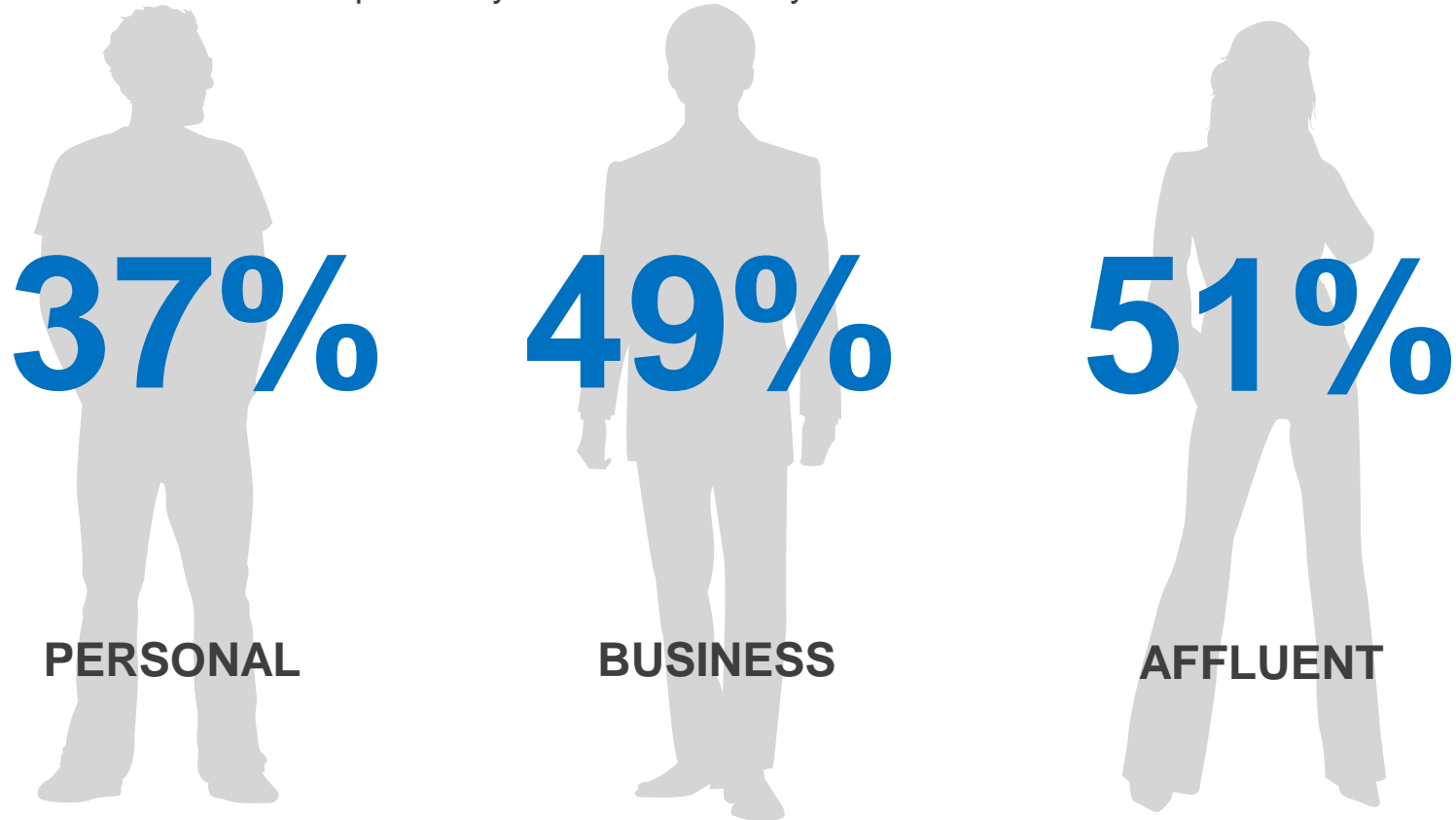
“Saving travel miles isn’t worth the effort since there are so many restrictions on their use” (2009)



Reinforce the value of frequent flyer miles to encourage brand loyalty and repeat usage. Cultivate brand loyalty with business travelers.

Air Travel Outlook Strongest Among Business and Affluent

"I plan to fly more in the next year than I did in 2009"



Opportunity to really engage with business and affluent travelers and use remarketing to leverage their optimistic sentiments for air travel.

Data into Action: Marketing Opportunities

- 1 Make it convenient for consumers to reserve their flight with a simple, easily accessible booking engine.

- 2 Ensure your brand and value messages are top-of-mind while travelers comparison shop: be prepared with coverage on generic terms and a tailored remarketing strategy.

- 3 Attract travelers with creative that highlights special offers and attractive price points.

- 4 Show business and affluent travelers that in addition to price point, convenience and efficiency differentiate your brand from others.

- 5 Reinforce the value of frequent flyer miles to encourage brand loyalty and repeat usage.

- 6 Stand out in the crowded airlines market with branding campaigns focused on capturing your desired consumer segment.

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