The American Traveler’s Path to Purchase
METHODOLOGY

> Expedia Media Solutions commissioned comScore to conduct a study on travel path to purchase in the United States

> comScore blended online travel behavioral data with data collected through a custom survey

**Custom Survey Qualifications**
- Age 18+
- Live in the U.S.
- Booked travel online within past six months
- Survey fielded from 805 total completes

**Behavioral Data Sources**
- comScore PC Panel (2 million devices worldwide)
- comScore Mobile Panel (15 thousand devices)
- comScore Multi-Platform
- comScore Census Tags (>1.5 trillion events monthly)
258 MILLION DIGITAL U.S. USERS

CONSUMING

1.5 TRILLION DIGITAL MINUTES

EACH MONTH

Data Source: comScore Media Metrix Multi-Platform Reporting, U.S., April 2016 data, Unique Visitors & Total Minutes.
MORE THAN 3 OF 5 DIGITAL U.S. USERS CONSUME TRAVEL CONTENT

Data Source: comScore Media Metrix Multi-Platform Reporting, U.S., April 2016 data, Share of Total Monthly Internet Unique Visitors Visiting Travel Content.
8.7 BILLION MINUTES (+41% Y/Y) SPENT ON DIGITAL TRAVEL CONTENT IN THE U.S.

TOTAL U.S. INTERNET MINUTES GREW BY 7%.

Total Multi-Platform Travel Minutes (MM)

MORE MINUTES ARE SPENT ENGAGING WITH TRAVEL CONTENT ON MOBILE DEVICES THAN ON DESKTOP IN THE U.S.

We now consistently see more minutes spent on mobile devices since October 2015, largely due to annual mobile growth in engagement strongly outpacing that of desktop.

MOBILE HAS CONSIDERABLY HIGHER REACH THAN DESKTOP WITHIN THE ONLINE TRAVEL INDUSTRY IN THE U.S.

Mobile now reaches 75% of all U.S. online travel users, while desktop reaches only 55%.

BROWSER REACHES MORE THAN 90% OF THE TRAVEL CATEGORY ON MOBILE, BUT COMPRISSES LESS THAN 40% OF THE ENGAGEMENT

Travel Category Access Method Comparison
April 2016

Platform Reach to Travel Category

<table>
<thead>
<tr>
<th>Platform</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Browser</td>
<td>92%</td>
</tr>
<tr>
<td>Application</td>
<td>32%</td>
</tr>
</tbody>
</table>

Share of Minutes by Platform

<table>
<thead>
<tr>
<th>Platform</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Browser</td>
<td>37%</td>
</tr>
<tr>
<td>Application</td>
<td>63%</td>
</tr>
</tbody>
</table>

Data Source: comScore Mobile Metrix Reporting, United States, Total Minutes, Travel Category Cut by Access Method (Application versus Browser), April 2016 data.
BROWSER DOMINATES IN MOST TRAVEL CATEGORIES

OTAS HAVE HIGHEST BROWSER SHARE

Data Source: comScore Mobile Metrix Reporting, United States, Total Minutes, Travel Category Cut by Access Method (Application versus Browser), April 2016 data.
ONE THIRD OF SMARTPHONE OWNERS AND ALMOST HALF OF TABLET OWNERS USED THEIR MOBILE DEVICES TO PLAN TRIPS

U.S. SMARTPHONE OWNERS WHO RESEARCHED USING THEIR DEVICE

Yes: 33%
No: 67%

Among US Online Travel Buyers with Smartphones (n=623)

U.S. TABLET OWNERS WHO RESEARCHED USING THEIR DEVICE

Yes: 40%
No: 60%

Among US Online Travel Buyers with Tablets (n=623)

Data Source: comScore Survey, MOBILESEARCH. DID YOU USE YOUR MOBILE DEVICE(S) TO PLAN OR RESEARCH THE TRIP YOU MOST RECENTLY BOOKED? – SMARTPHONE, Among UK Online Travel Bookers with Smartphones (n=713), Among U.S. Online Travel Bookers with Smartphones (n=623), Among CA Online Travel Bookers with Smartphones (n=687)
TRAVEL IS A CONSIDERED & TIME CONSUMING PURCHASE
FOR U.S. TRAVEL BOOKERS

3
RESOURCE TYPES USED
THROUGHOUT THE DECISION PROCESS
(ONLINE & OFFLINE).

20
VISITS
NUMBER OF TRAVEL VISITS ON AVERAGE PER WEEK
ONLINE BOOKERS SPEND THROUGHOUT THE 45 DAYS
PRIOR TO BOOKING.

44 MINUTES
AVERAGE TIME U.S. ONLINE BOOKERS SPENT ON
ONLINE TRAVEL AGENT SITES ON DESKTOP THE WEEK
OF BOOKING.

Travel Engagement
Avg. Desktop Travel Minutes per Booker

- 100
- 200
- 300
- 400

Week 6 before
Week 5 before
Week 4 before
Week 3 before
Week 2 before
Week 1 before
Week of booking

Data Source: [Clockwise from top left] Box 1: comScore Survey, RESOURCE. WHAT ARE ALL THE RESOURCES YOU USED PRIOR TO BOOKING YOUR MOST RECENT TRIP?, Among Total U.S. Online Travel Bookers (n=805), Box 2: comScore U.S. Desktop Panel, Custom Path to Booking Visitation Analysis, Weekly Minutes per Travel Booker, Dec ’15 – Feb ’16, Travel Booker Segment. Box 3: BOOKPLACE. THINKING ABOUT YOUR MOST RECENT TRIP YOU HAVE BOOKED, WHERE IS THE DESTINATION?, Among Total U.S. Online Travel Bookers (n=805). Box 4-5: comScore U.S. Desktop Panel, Custom Path to Booking Visitation Analysis, Weekly Minutes & Visits per Travel Booker, Dec ’15 – Feb ’16, Travel Booker Segment.

U.S. TRAVEL BOOKERS ARE
5X MORE LIKELY TO HAVE BOOKED
A DOMESTIC TRIP THAN AN INTERNATIONAL TRIP IN THE LAST SIX MONTHS.
U.S. TRAVELERS SPEND $1,255 ONLINE IN THE 45 DAYS LEADING UP TO THEIR TRIPS

Data Source: comScore U.S. Desktop Panel, Custom Path to Booking E-commerce Analysis, Custom Traveler Segment, Average Online Non-Travel Dollars Spent in 45 Path to Travel, Dec ’15 – Feb ’16 Traveling Time Period.
U.S. PACKAGE BOOKERS SPEND MORE, REGARDLESS OF HOW FAR IN ADVANCE THEY BOOKED THEIR TRIP

Average U.S. Traveler Spend by Booking Type
In 45 Days Leading Up to Trip

Data Source: comScore U.S. Desktop Panel, Custom Path to Booking E-commerce Analysis, Custom Traveler Segment, Long-Term and Short-Term Sub-segments further cut by type of travel segments, Average Online Non-Travel Dollars Spent in 45 Path to Travel, Dec ’15 – Feb ’16 Traveling Time Period.
JUST OVER ONE-THIRD OF ONLINE TRAVEL BOOKERS STARTED WITH MULTIPLE DESTINATIONS IN MIND
EVEN MORE MILLENNIALS CONSIDER MULTIPLE DESTINATIONS

Data Source: comScore Survey, DESTINATIONS. PRIOR TO DECIDING ON YOUR FINAL DESTINATION, HOW MANY OTHER DESTINATIONS DID YOU CONSIDER VISITING? Among Total U.S. Online Travel Bookers (n=805), Millennials (n=134)
U.S. TRAVEL BOOKERS RESEARCH U.S. TRIPS MOST,
But 69% of Research is done in international destinations

Destination Share of Research
Across 45 Day Booking Path

- United States: 31%
- Europe: 27%
- Latin America: 14%
- Asia: 11%
- Africa: 9%
- Canada: 5%
- Australia & New Zealand: 3%

Data Source: comScore U.S. Desktop Panel, Custom Path to Booking Visitation Analysis Using comScore Proximic Categorization, Total Travel Pages Across 45 Day Booking Path, Online Travel Booker Segment: Dec ’15 – Feb ’16.
Online travel bookers have increasing reach with travel content throughout the weeks preceding a booking event.

- By the end of the booking path, average visits per booker increased by 88%, resulting in close to daily visits to travel sites, on average.

- Number of visits to travel sites made by bookers 45 days before booking:

  140

Average travel site visits per week
(Number of travel sites visited per week by the average segment member, Oct’15-Feb’16 aggregate)

Data Source: comScore U.S. Desktop Panel, Custom Path to Booking Visitation Analysis, Weekly Visits per User, Dec ’15 – Feb ’16.
ONLINE TRAVEL BOOKERS HAVE INCREASING ENGAGEMENT WITH TRAVEL CONTENT THROUGHOUT THE WEEKS PRECEDING A BOOKING EVENT

AMERICANS SPEND ALMOST FIVE HOURS WITH TRAVEL CONTENT THE WEEK OF BOOKING

comScore U.S. Desktop Panel, Custom Path to Booking Visitation Analysis, Weekly Minutes & Visits per Travel Booker, Dec ’15 – Feb ’16, Travel Booker Segment.
OTAS HAVE THE LARGEST REACH OF ONLINE TRAVEL BOOKERS COMPARED TO TRAVEL SITE CATEGORIES THROUGHOUT BOOKERS’ TRAVEL BOOKING PATHS

Share of Travel Visits
Throughout 45 Day Path to Booking

OTA, 33%
Travel Research, 21%
Accommodations, 17%
Airline, 15%
Ground/Rail/Auto/Bus, 10%
DMO, 2%
Other, 3%

Data Source: comScore U.S. Desktop Panel, Custom Path to Booking Visitation Analysis & Categorization, Share of Total Visits per User Across 45 Day Path, Dec ’15 – Feb ’16, Custom Travel Booker Audience Segment.
ONLINE TRAVEL BOOKERS HAVE INCREASING ENGAGEMENT WITH TRAVEL CONTENT THROUGHOUT THE WEEKS PRECEDING A BOOKING EVENT

Average Visits to Travel Categories per Week
(Average visits per booker to sites within each travel category, by week, Dec’15-Feb’16 aggregate)

6 Weeks Out
5 Weeks Out
4 Weeks Out
3 Weeks Out
2 Weeks Out
1 Week Out
Week of Booking

Data Source: comScore U.S. Desktop Panel, Custom Path to Booking Visitation Analysis & Categorization, Weekly Visits per User, Dec ’15 – Feb ’16, Custom Travel Booker Audience Segment.
SEARCH ENGINES AND FAMILY/FRIEND RECOMMENDATIONS WERE USED MOSTLY AT THE START OF THE BOOKING PATH, WHILE OTAS, AIRLINES SITES AND HOTEL SITES WERE USED COMMONLY THROUGHOUT.

Resource Used Timeframe

When I First Started
- Search Engines: 69%
- Friends/Family Recs: 50%
- OTAs: 41%
- Airlines: 33%
- Hotels: 36%

When I Was Narrowing Options
- Search Engines: 66%
- Friends/Family Recs: 39%
- OTAs: 33%
- Airlines: 28%
- Hotels: 25%

Right Before Booking
- Search Engines: 37%
- Friends/Family Recs: 29%
- OTAs: 23%
- Airlines: 24%
- Hotels: 26%

Used to Book
- Search Engines: 42%
- Friends/Family Recs: 48%
- OTAs: 8%
- Airlines: 7%
- Hotels: 36%

Overlap in resource usage decreases

Data Source: comScore Survey, WHENRESOURCE. TOP 5 - WHEN DID YOU USE EACH RESOURCE FOR THE RECENT BOOKING OF YOUR TRIP?, Among U.S. Online Travel Bookers Who Used Each Resource (n=193-296)
OTAS WERE THE TOP ONLINE RESOURCE USED AT THE START OF THE DESTINATION DECISION PROCESS

First Resource Used

<table>
<thead>
<tr>
<th>Resource</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>OTAs</td>
<td>16%</td>
</tr>
<tr>
<td>Airline sites</td>
<td>12%</td>
</tr>
<tr>
<td>Friend / family recs</td>
<td>12%</td>
</tr>
<tr>
<td>Hotel sites</td>
<td>12%</td>
</tr>
<tr>
<td>Search engines</td>
<td>12%</td>
</tr>
<tr>
<td>Search engine travel sites</td>
<td>7%</td>
</tr>
<tr>
<td>(Yahoo.com/travel)</td>
<td></td>
</tr>
<tr>
<td>Aggregator sites</td>
<td>7%</td>
</tr>
<tr>
<td>Travel information sites</td>
<td>5%</td>
</tr>
<tr>
<td>Destination sites</td>
<td>4%</td>
</tr>
<tr>
<td>OTAs</td>
<td>3%</td>
</tr>
<tr>
<td>Aggregator sites</td>
<td>3%</td>
</tr>
</tbody>
</table>

Data Source: comScore Survey, START. WHAT WAS THE FIRST RESOURCE YOU USED TO HELP YOU DECIDE ON THE DESTINATION OF YOUR RECENT BOOKING? Among Total U.S. Online Travel Bookers (n=805)

Not listed: ≤2%: Social media, ground transportation/cruise sites, travel books/magazines, deal buying sites, my company’s travel site, car rental sites, offline travel agency, destination’s call center, online travel guide sites, home rental sites, live TV shows, online travel videos, blogs
OTAS AND AIRLINE SITES WERE THE MOST INFLUENTIAL RESOURCES IN DESTINATION CHOICES (ONLINE OR OFFLINE)

<table>
<thead>
<tr>
<th>Influential Resources</th>
<th>Influence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online travel agencies (Expedia.com, etc.)</td>
<td>17%</td>
</tr>
<tr>
<td>Airline sites (United.com, etc.)</td>
<td>16%</td>
</tr>
<tr>
<td>Friend / family recommendations</td>
<td>14%</td>
</tr>
<tr>
<td>Hotel sites (Marriott.com, etc.)</td>
<td>12%</td>
</tr>
<tr>
<td>Search engines (Google.com, etc.)</td>
<td>7%</td>
</tr>
<tr>
<td>Aggregator/Meta-search websites (Kayak.com)</td>
<td>4%</td>
</tr>
<tr>
<td>Travel information sites (Tripadvisor.com, etc.)</td>
<td>4%</td>
</tr>
<tr>
<td>Destination sites (Visitcalifornia.com, etc.)</td>
<td>3%</td>
</tr>
<tr>
<td>Search engine travel sites (Yahoo.com/travel, etc.)</td>
<td>3%</td>
</tr>
<tr>
<td>Travel books / magazines</td>
<td>3%</td>
</tr>
</tbody>
</table>

Data Source: comScore Survey, INFLUENTIALRESOURCE. MOST INFLUENTIAL - PLEASE RANK THE TOP THREE RESOURCES THAT INFLUENCED YOUR DESTINATION DECISION. Among U.S. Online Travel Bookers Who Used Resources (n=758)

<3%: Social media, online travel guide sites, car rental sites, deal buying sites, home rental sites, ground transportation/cruise sites, offline travel agency, online travel videos, destination’s call center, my company’s travel site, live TV shows, blogs
COST AND ACCOMMODATIONS WERE MOST CRITICAL IN THE DESTINATION DECISION PROCESS

Most Critical Content on Destination Decision Making

- Travel costs: 36%
- Hotel / accommodation: 27%
- Activities to do: 16%
- Family / friends recommendations: 14%
- Reviews / ratings: 13%
- Hotel / Airfare loyalty programs: 12%
- Time to destination: 12%
- Weather / climate info: 12%

Data Source: comScore Survey, CRITCONTENT. WHAT INFORMATION WAS MOST CRITICAL IN HELPING YOU DECIDE ON YOUR DESTINATION?, Among Total U.S. Online Travel Bookers (n=805)

<8%: Pics of destination, destination history/culture, restaurant info/reviews, local transport, health/safety, destination videos, organized tours, travel insurance info, other
None of the above=15%
47% of TRAVEL BOOKERS RECALLED SEEING A TRAVEL AD WHILE SHOPPING FOR OR BOOKING TRAVEL

Data Source: comScore Survey, ADAWARE. DID YOU NOTICE ANY ADVERTISING RELATED TO THE FOLLOWING SERVICES WHILE YOU WERE SHOPPING FOR OR BOOKING YOUR TRAVEL?, Among Total US Online Travel Bookers (n=805)
27% of travel bookers were influenced by advertising when considering more than one location.

Data Source: comScore Survey, DESTINATIONAD. Did any advertising (via online banners, online videos, TV, radio, magazines, etc.) influence your decision to visit [specific destination]?, Among Total US Online Travel Bookers Who Considered More than One Destination (n=253)
AS TRAVEL AD IMPRESSIONS INCREASE, BOOKERS RECALL FEWER ADS

BOOKERS ARE STILL ENGAGING WITH TRAVEL SITES, BUT IT IS LESS LIKELY THAT ADVERTISING WILL AFFECT THEIR DECISIONS.

Data Sources: Total Impressions Volume Metric: Data Source: comScore U.S. Desktop Panel, Custom Path to Booking Visitation Analysis & Categorization, Share of Total Ad Impressions, Across 45 Day Pre-Booking Path, Booking Time Period: Dec ’15 – Feb ’16, Custom Travel Booker Audience Segment.

Average Recall Rate: comScore Survey, ADNOTICE. WHEN DID YOU NOTICE ADVERTISING RELATED TO EACH TRAVEL SERVICE? (Among U.S. Online Travel Bookers Who Noticed Ads (n=364))
KEY FINDINGS & INSIGHTS

- Travel content is widely consumed in the US, with double digit growth year over year.

- Mobile usage is growing, and in the US mobile engagement with travel content surpassed desktop.

- Travel is a considered and time-consuming purchase, leading travel bookers to make hundreds of visits to travel sites in the weeks leading up to a purchase.

- Throughout the booking path, OTAs have the highest engagement across travel site categories, accounting for more than 30 percent of total site visits.

- Nearly one third of travel bookers were influenced by advertising when considering more than one destination.

- Advertising recall is the highest in the initial stages of the purchase journey, when exposure is the lowest.
THANK YOU

TO LEARN MORE DOWNLOAD
The American Digital Traveler Landscape Whitepaper
bit.ly/americantraveler

www.advertising.expedia.com