

RESEARCH



ADVERTISING AWARENESS INSIGHTS

Advertising recall during
the travel consumer's
path to purchase

ADVERTISING CAN INFLUENCE TRAVELER DESTINATION DECISIONS



30%



27%



38%

OF TRAVEL BOOKERS WERE INFLUENCED BY ADVERTISING
WHEN CONSIDERING MORE THAN ONE LOCATION

TRAVEL BOOKERS NOTICE TRAVEL ADVERTISING



59%



47%

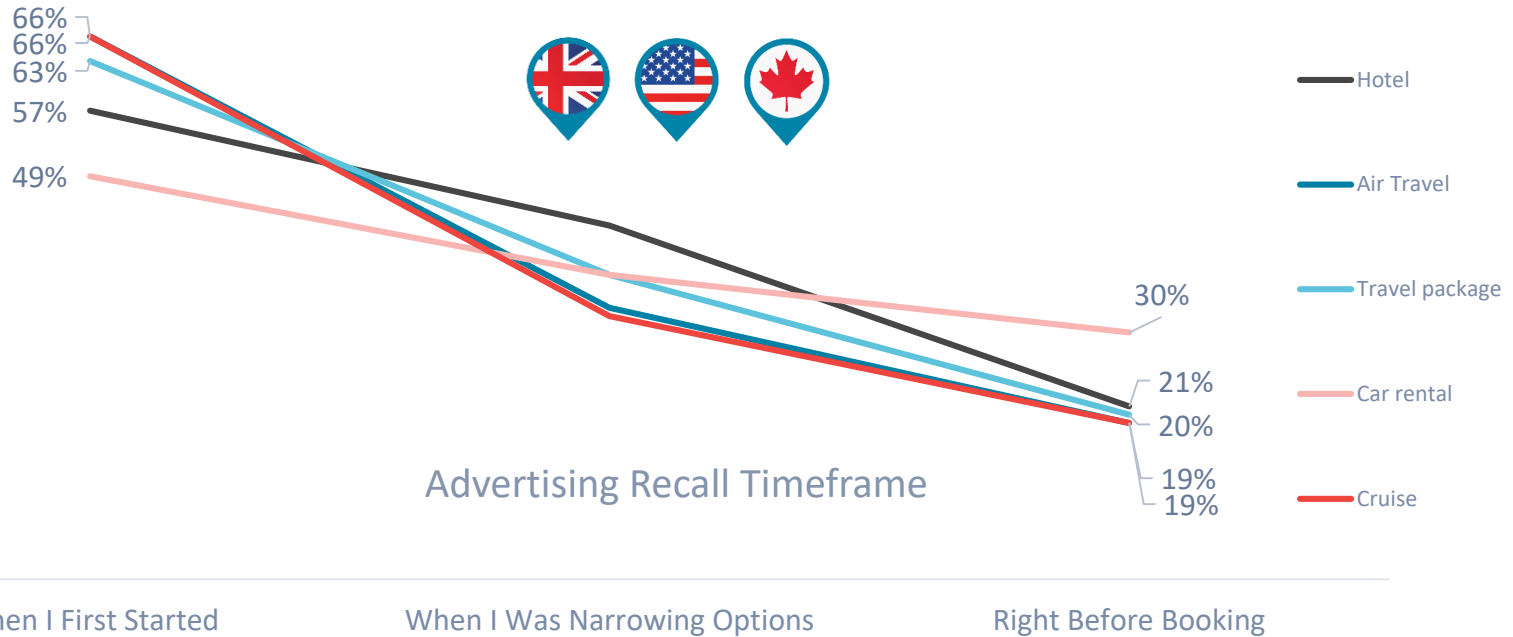


64%

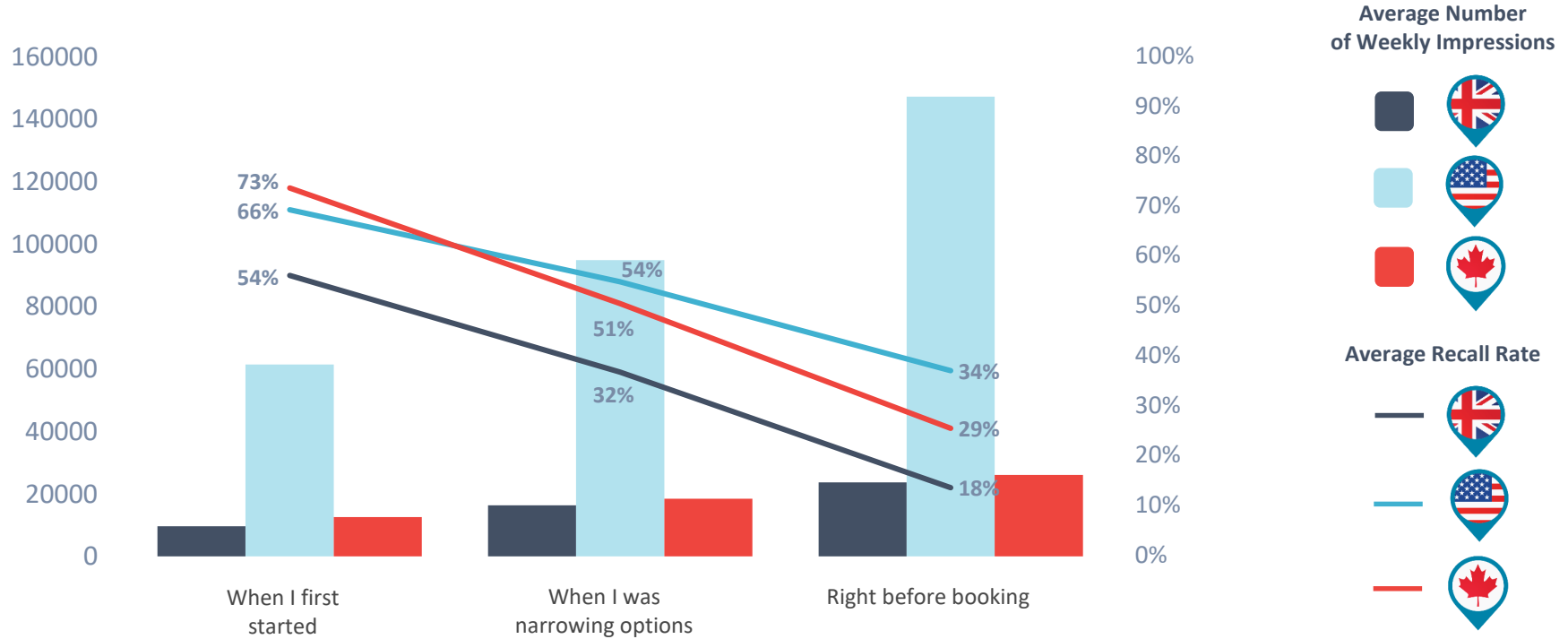


OF TRAVEL BOOKERS RECALLED SEEING A TRAVEL AD
WHILE SHOPPING FOR OR BOOKING TRAVEL

LARGEST POTENTIAL FOR ADVERTISING IMPACT DURING INITIAL STAGES OF TRAVEL BOOKING PATH

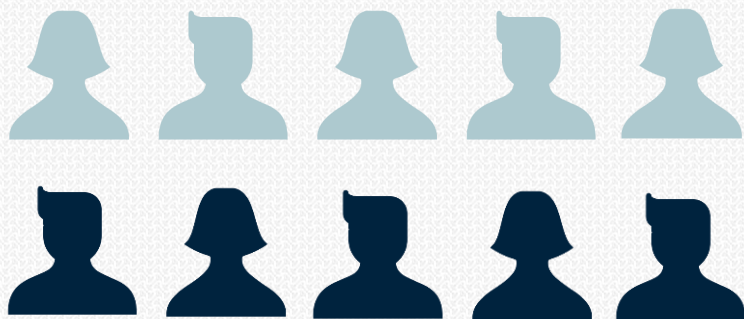


AS TRAVEL AD IMPRESSIONS INCREASE, BOOKERS RECALL FEWER ADS

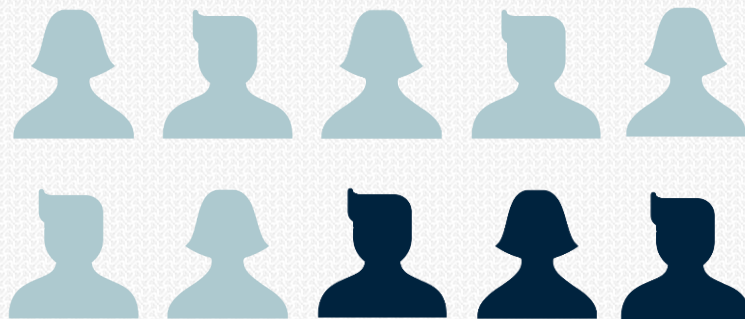




American Traveler: Advertising Trends



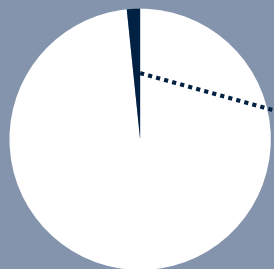
47% of TRAVEL
BOOKERS RECALLED
SEEING A TRAVEL AD
WHILE SHOPPING FOR
OR BOOKING TRAVEL



27% of TRAVEL
BOOKERS WERE
INFLUENCED BY
ADVERTISING WHEN
CONSIDERING MORE
THAN ONE LOCATION



TRAVEL ADVERTISING IS A CROWDED MARKETPLACE BUT BRANDS HAVE OPPORTUNITIES



■ Non Travel ■ Travel

2% AD SHARE

TRAVEL AD SHARE
COMPARED TO ALL AD
CATEGORIES (ALL
USERS).

>4X

THE NUMBER OF TRAVEL
ADS SHOWN TO BOOKERS
VERSUS TOTAL INTERNET
USERS

1ST

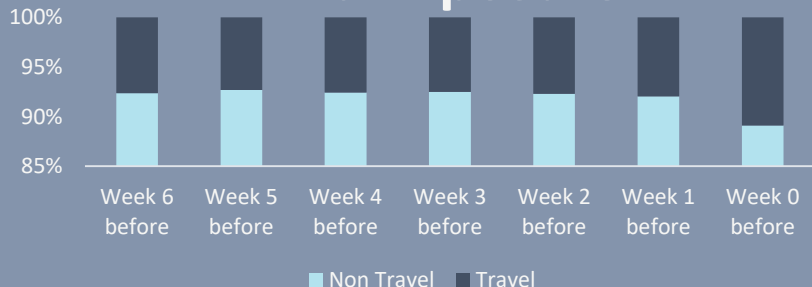
TRAVEL IS LARGEST AD
CATEGORY

**HOTEL
BOOKERS**

SEE 30% MORE TRAVEL
IMPRESSIONS THAN AIR OR
PACKAGE BOOKERS

APPAREL &
ACCESSORIES ADS
WERE THE 2ND MOST
COMMONLY SERVED
TO ONLINE BOOKERS.

Ad Exposure

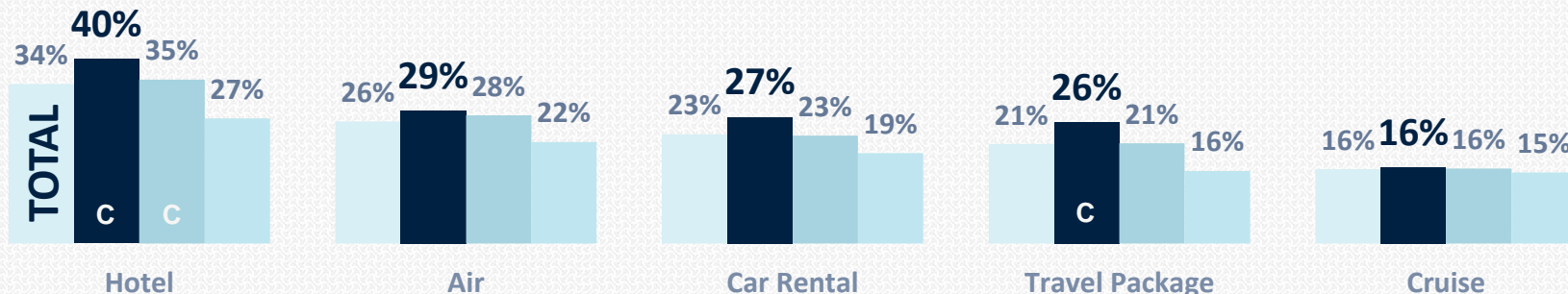




MILLENNIALS HAD A HIGHER TENDENCY TO NOTICE TRAVEL ADS FOR HOTELS AND TRAVEL PACKAGES COMPARED TO BABY BOOMERS.

Advertising Awareness Among Total U.S. Online Travel Bookers

■ Total (n=805) ■ Millennials (A=134) ■ Gen X (B=299) ■ Baby Boomers (C=372)

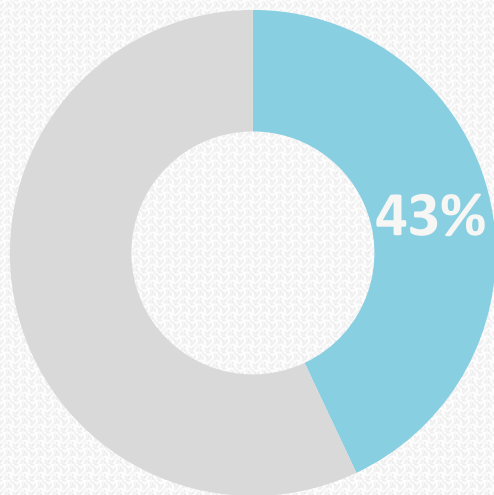


Data Source: comScore Survey, ADAWARE. DID YOU NOTICE ANY ADVERTISING RELATED TO THE FOLLOWING SERVICES WHILE YOU WERE SHOPPING FOR OR BOOKING YOUR TRAVEL?, Among Total U.S. Online Travel Bookers (n=805) and By Age
A/B/C letters indicate a significant difference between groups at a 95% confidence level.

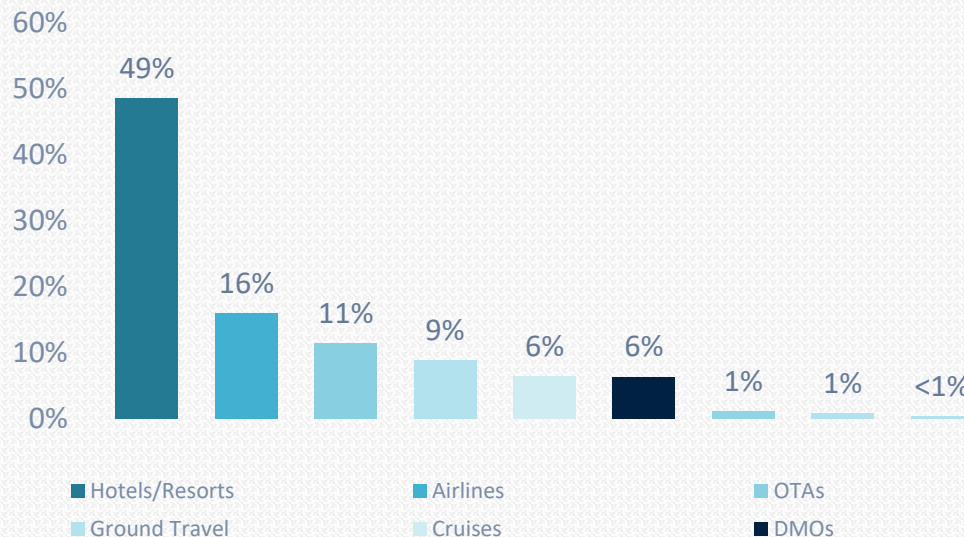


ROUGHLY TWO IN FIVE ONLINE TRAVEL BOOKERS RECALLED SEEING TRAVEL DESTINATION ADVERTISING IN THE PAST 30 DAYS.

Advertising Recall In Past 30 Days



Share of Total Travel Impressions *Over 45 Day Online Booker Path*



Data Source: Left: comScore Survey, ADRECALL. IN THE PAST 30 DAYS, HAVE YOU SEEN OR HEARD ADVERTISING FOR SPECIFIC TRAVEL DESTINATIONS?, Among Total U.S. Online Travel Bookers (n=805)

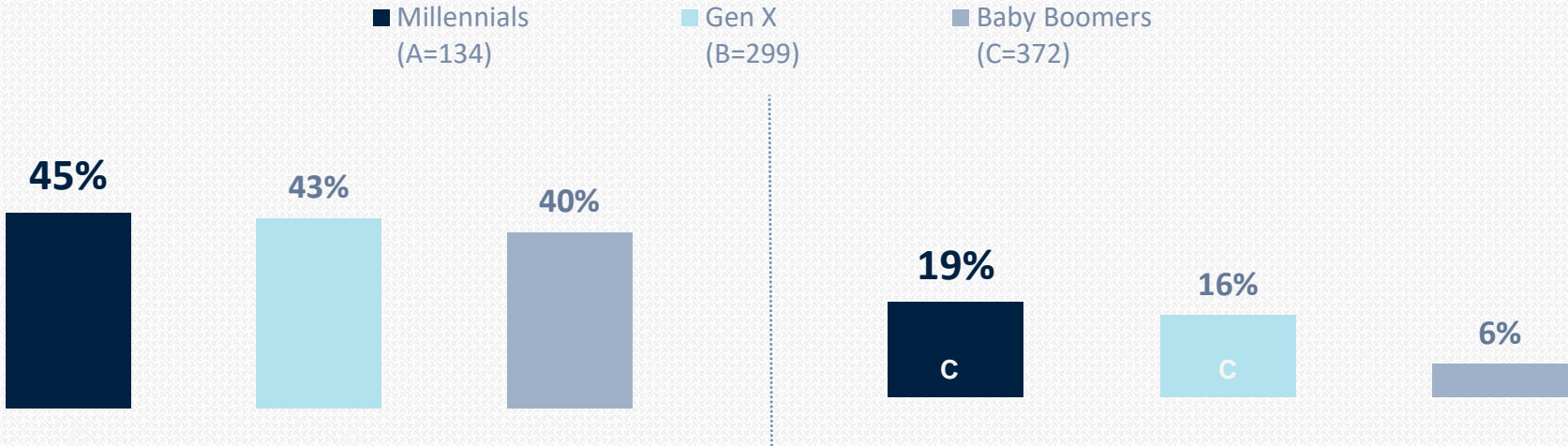
Right: comScore U.S. Desktop Panel, Custom Path to Booking Visitation Analysis & Categorization, Share of Total Travel Ad Impressions, Across 45 Day Pre-Booking Path, Booking Time Period: Dec '15 – Feb '16, Custom Travel Booker Audience Segment.



MILLENNIAL AND GEN X'ERS WERE MORE LIKELY THAN BABY BOOMERS TO BE INFLUENCED BY ADS REGARDING THEIR DESTINATION CHOICES.

Advertising Recall

Destination Influenced by Advertising

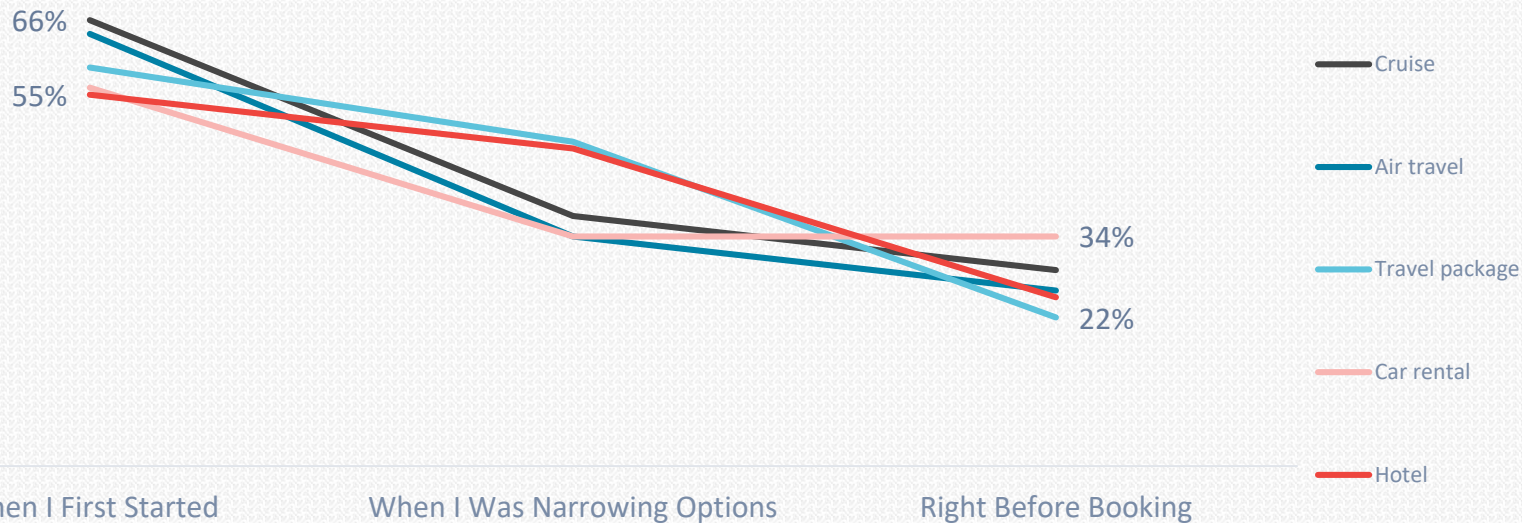


Data Source: comScore Survey, ADRECALL. % YES - IN THE PAST 30 DAYS, HAVE YOU SEEN OR HEARD ADVERTISING FOR SPECIFIC TRAVEL DESTINATIONS? Among Total U.S. Online Travel Bookers – By Age
DESTINATIONAD. % YES - DID ANY ADVERTISING INFLUENCE YOUR DECISION TO VISIT? Among Total U.S. Online Travel Bookers – By Age
A/B/C letters indicate a significant difference between groups at a 95% confidence level.



ADVERTISING HAS THE LARGEST POTENTIAL FOR IMPACT DURING THE INITIAL STAGES OF TRAVEL RESEARCH.

Advertising Recall Timeframe

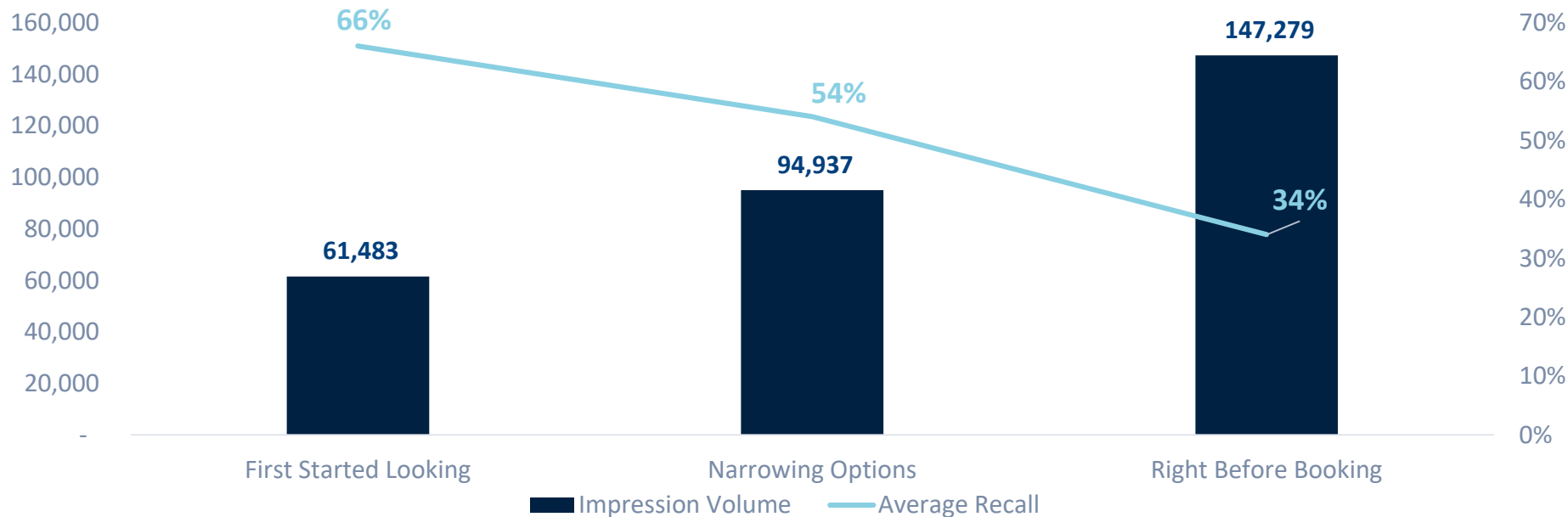


Data Source: comScore Survey, ADNOTICE. WHEN DID YOU NOTICE ADVERTISING RELATED TO EACH TRAVEL SERVICE?
Among U.S. Online Travel Bookers Who Noticed Ads for Each Service (n=112-245)



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.

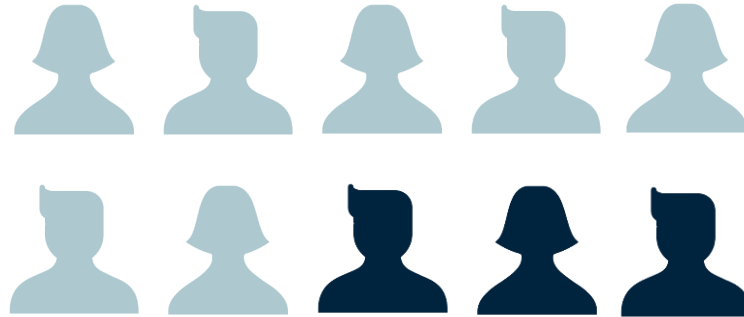




British Traveler: Advertising Trends

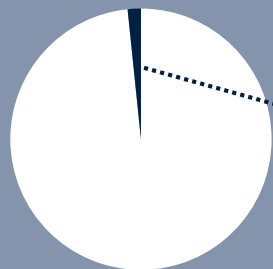


ADVERTISING INFLUENCED THE DESTINATION DECISIONS FOR **3 IN 10 ONLINE TRAVEL BOOKERS** WHO WERE CONSIDERING MORE THAN ONE DESTINATION



30% OF TRAVEL
BOOKERS WERE
INFLUENCED BY
ADVERTISING WHEN
CONSIDERING MORE
THAN ONE LOCATION

THE TRAVEL MARKETPLACE IS RICH WITH OPPORTUNITIES FOR ADVERTISERS



2% AD SHARE

TRAVEL AD SHARE
COMPARED TO ALL AD
CATEGORIES (ALL
USERS)

■ Non Travel ■ Travel

1 IN 10 ADS

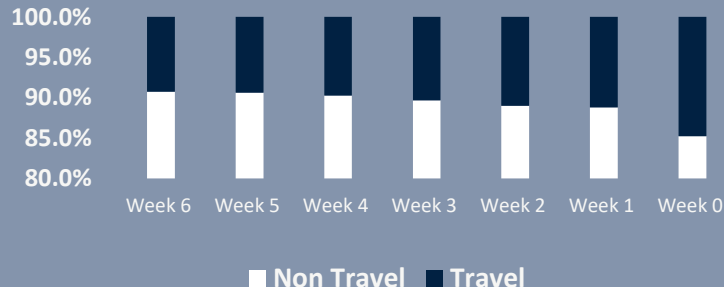
SHOWN TO ONLINE TRAVEL BOOKERS DURING
THEIR 45 DAY PATH WERE TRAVEL SPECIFIC

TRAVEL IS THE
2nd

LARGEST AD
CATEGORY

APPAREL &
ACCESSORIES ADS
WERE THE MOST
COMMONLY SERVED
TO ONLINE BOOKERS

AD EXPOSURE



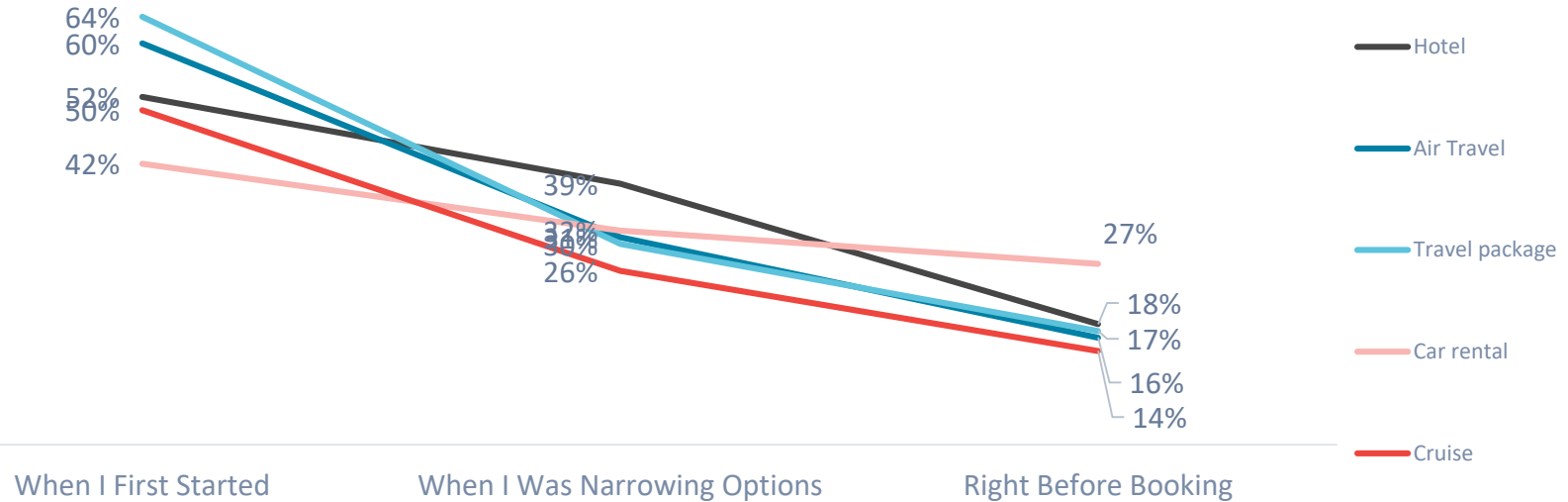
25%+

MORE LIKELY TO NOTICE ADS
MILLENNIALS TENDENCY TO NOTICE TRAVEL
ADS COMPARED TO BABY BOOMERS OR GEN-X

ADVERTISING RECALL DROPS BY AS MUCH AS 65% DEPENDING ON TRAVEL CATEGORY THROUGHOUT THE PURCHASE PATH



CAR RENTAL ADVERTISING SHOWED RELATIVELY STABLE RECALL THROUGHOUT THE PROCESS



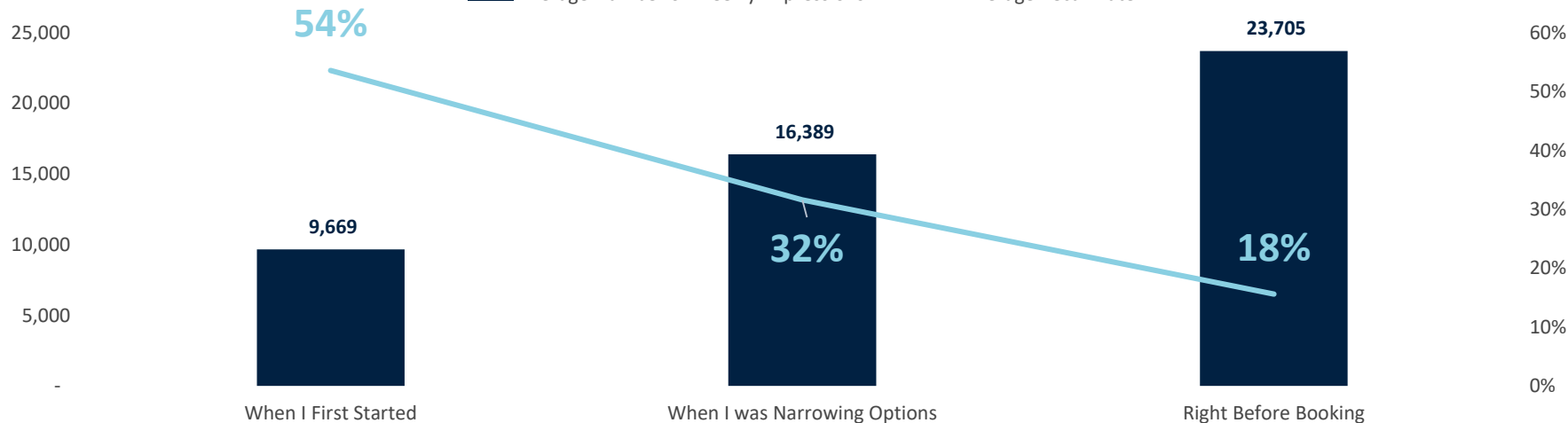
AS TRAVEL AD IMPRESSIONS INCREASE, BOOKERS RECALL FEWER ADS.



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

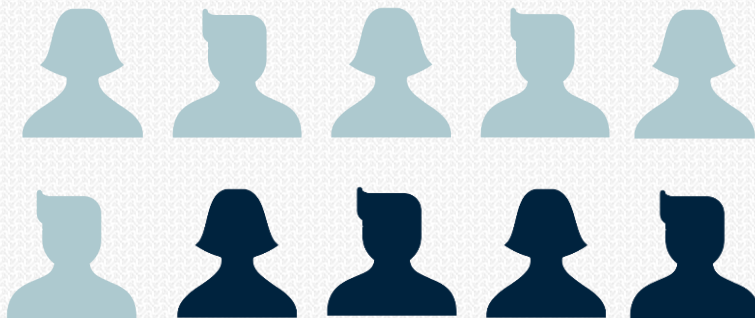
Impression Volume vs. Average Recall

■ Average Number of Weekly Impressions — Average Recall Rate





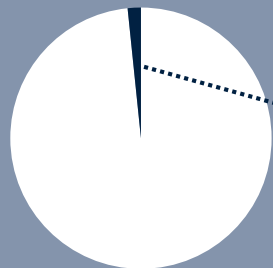
Canadian Traveler: Advertising Trends



38% of TRAVEL
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TRAVEL ADVERTISING IS A CROWDED MARKETPLACE BUT BRANDS HAVE NEW OPPORTUNITIES



2% AD SHARE

TRAVEL AD SHARE
COMPARED TO ALL AD
CATEGORIES (ALL
USERS).

■ Non Travel ■ Travel

1 IN 10 ADS

SHOWN TO ONLINE TRAVEL BOOKERS DURING
THEIR 45 DAY PATH WERE TRAVEL ADS.

2nd

TRAVEL IS 2ND
LARGEST AD
CATEGORY

Ad Exposure



80%+

TRAVEL IMPRESSIONS ARE SERVED BY
OTAs, DMOs, Airlines, Hotels/Resorts
Advertisers

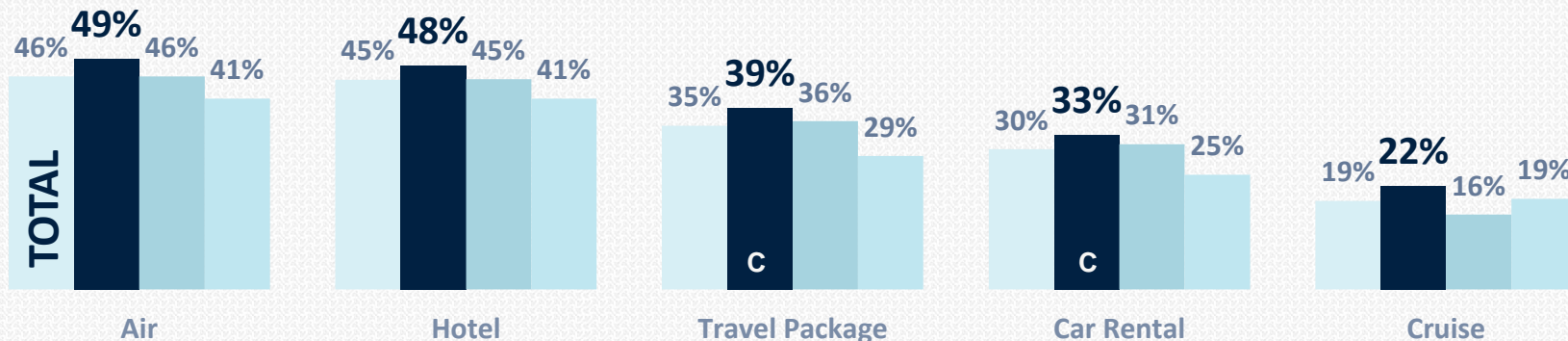
AUTOMOBILE
MANUFACTURERS
WERE THE MOST
COMMONLY SERVED
TO ONLINE BOOKERS.



MILLENNIALS HAVE A HIGHER TENDENCY TO NOTICE TRAVEL ADS FOR TRAVEL PACKAGES AND CAR RENTALS COMPARED TO BABY BOOMERS.

Advertising Awareness

■ Total (n=815) ■ Millennials (A=275) ■ Gen X (B=344) ■ Baby Boomers (C=196)



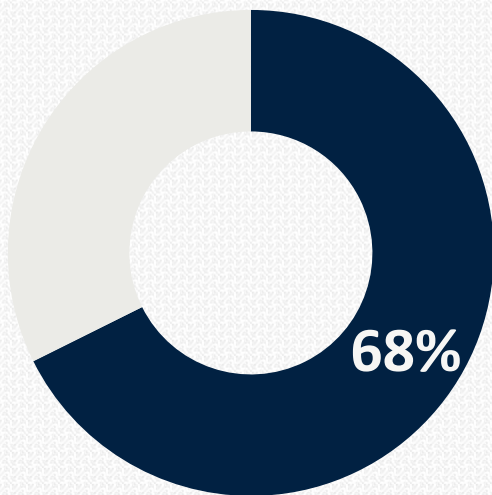
Data Source: comScore Survey, ADAWARE. DID YOU NOTICE ANY ADVERTISING RELATED TO THE FOLLOWING SERVICES WHILE YOU WERE SHOPPING FOR OR BOOKING YOUR TRAVEL? Among Total CA Online Travel Bookers (n=815)

A/B/C letters indicate a significant difference between groups at a 95% confidence level.

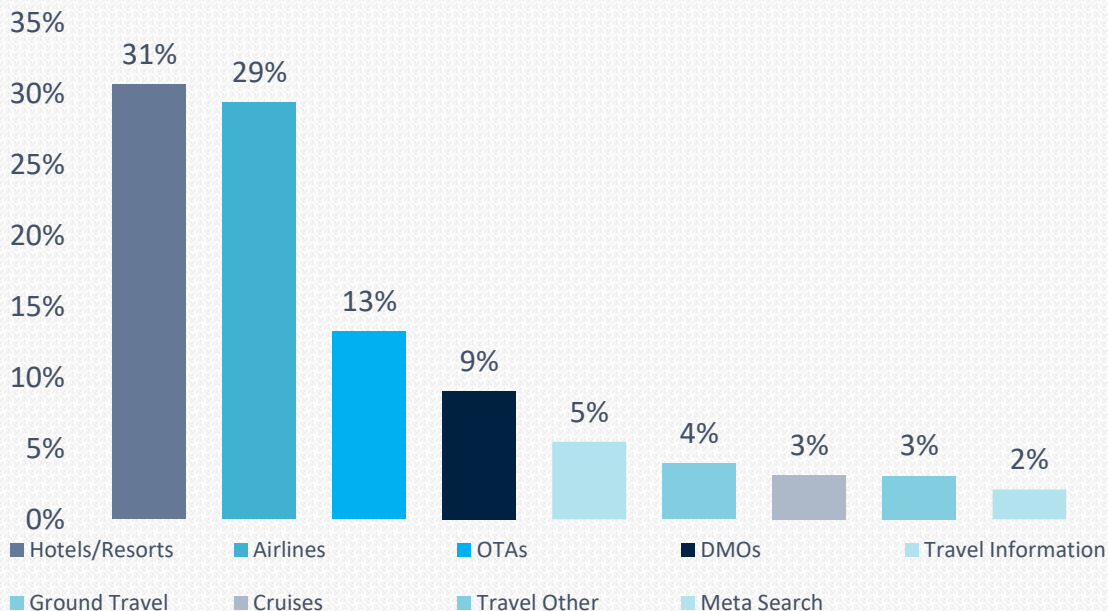


CLOSE TO SEVEN IN TEN ONLINE TRAVEL BUYERS RECALL SEEING TRAVEL DESTINATION ADVERTISING IN THE PAST 30 DAYS.

Advertising Recall In Past 30 Days



Share of Total Travel Impressions
Over 45 Day Online Booker Path to Booking

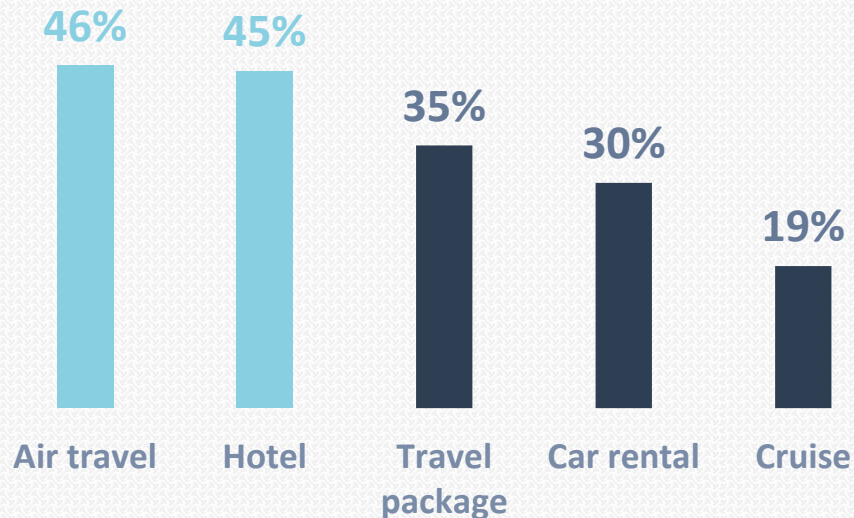


Data Source: Left: comScore Survey, ADAWARE. DID YOU NOTICE ANY ADVERTISING RELATED TO THE FOLLOWING SERVICES WHILE YOU WERE SHOPPING FOR OR BOOKING YOUR TRAVEL?, Among Total CA Online Travel Bookers (n=815)
Right: comScore CA Desktop Panel, Custom Path to Booking Visitation Analysis & Categorization, Share of Total Travel Ad Impressions, Across 45 Day Pre-Booking Path, Booking Time Period: Dec '15 – Feb '16, Custom Travel Booker Audience Segment.



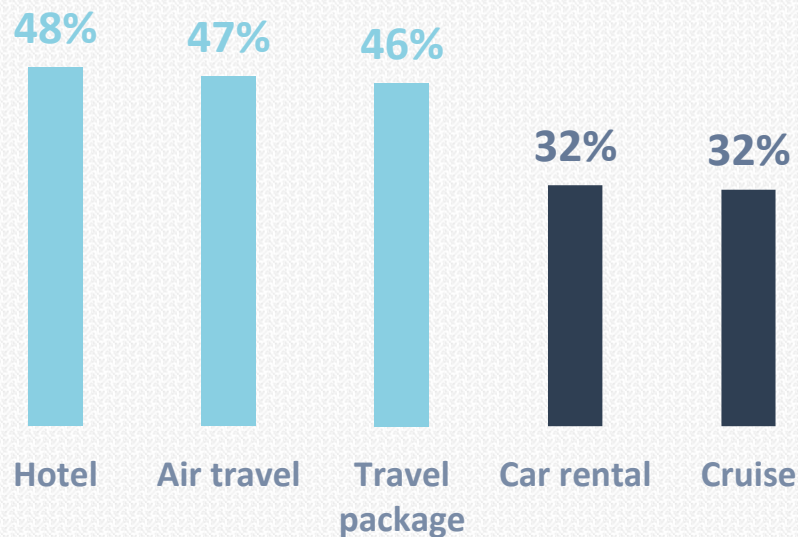
AD AWARENESS IS HIGHEST FOR AIR TRAVEL AND HOTELS RELATIVE TO OTHER TRAVEL SERVICES.

Advertising Recall



ADS FOR HOTELS, AIR TRAVEL, AND TRAVEL PACKAGES INFLUENCE MORE AD VIEWERS DURING THE BOOKING PROCESS COMPARED TO OTHER AD TYPES.

Advertising Influence



Data Source: Left: comScore Survey, ADAWARE. DID YOU NOTICE ANY ADVERTISING RELATED TO THE FOLLOWING SERVICES WHILE YOU WERE SHOPPING FOR OR BOOKING YOUR TRAVEL?, Among Total CA Online Travel Bookers (n=815)

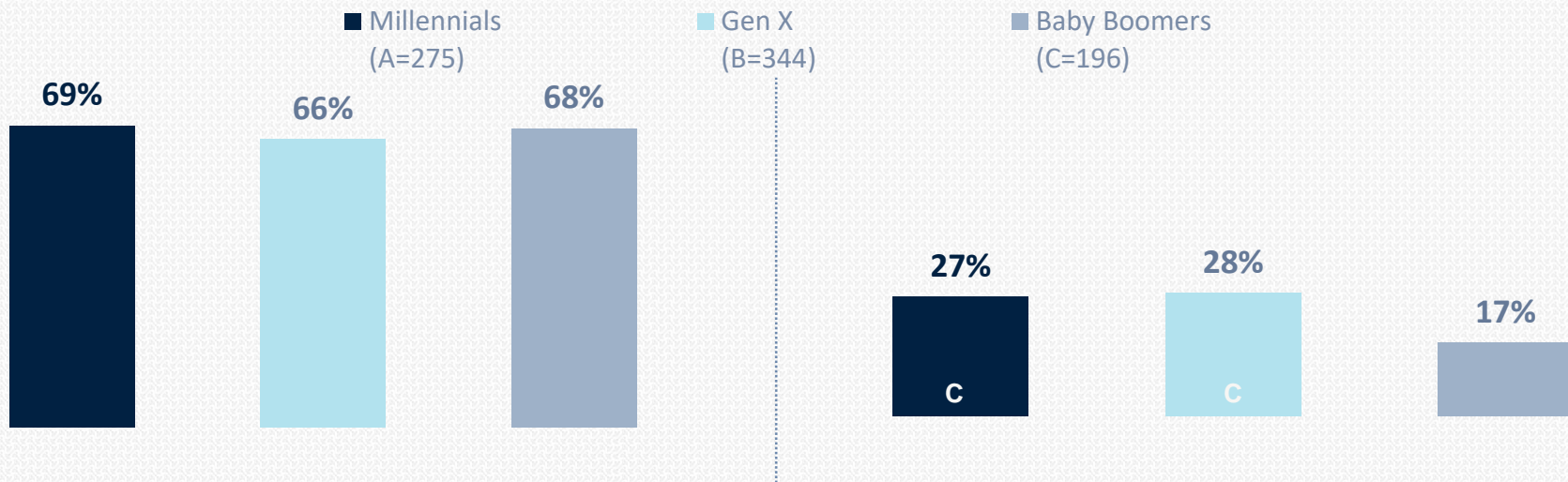
Right: ADINFLUENCE. DID ANY ADVERTISING INFLUENCE YOUR DECISIONS TO BOOK EACH TRAVEL SERVICE?, Among CA Online Travel Bookers Who Noticed Ads for Each Service (n=154-373)



MILLENNIALS AND GEN X TRAVELERS ARE MORE LIKELY THAN BABY BOOMERS TO HAVE THEIR DESTINATION INFLUENCED BY ADS.

Advertising Recall

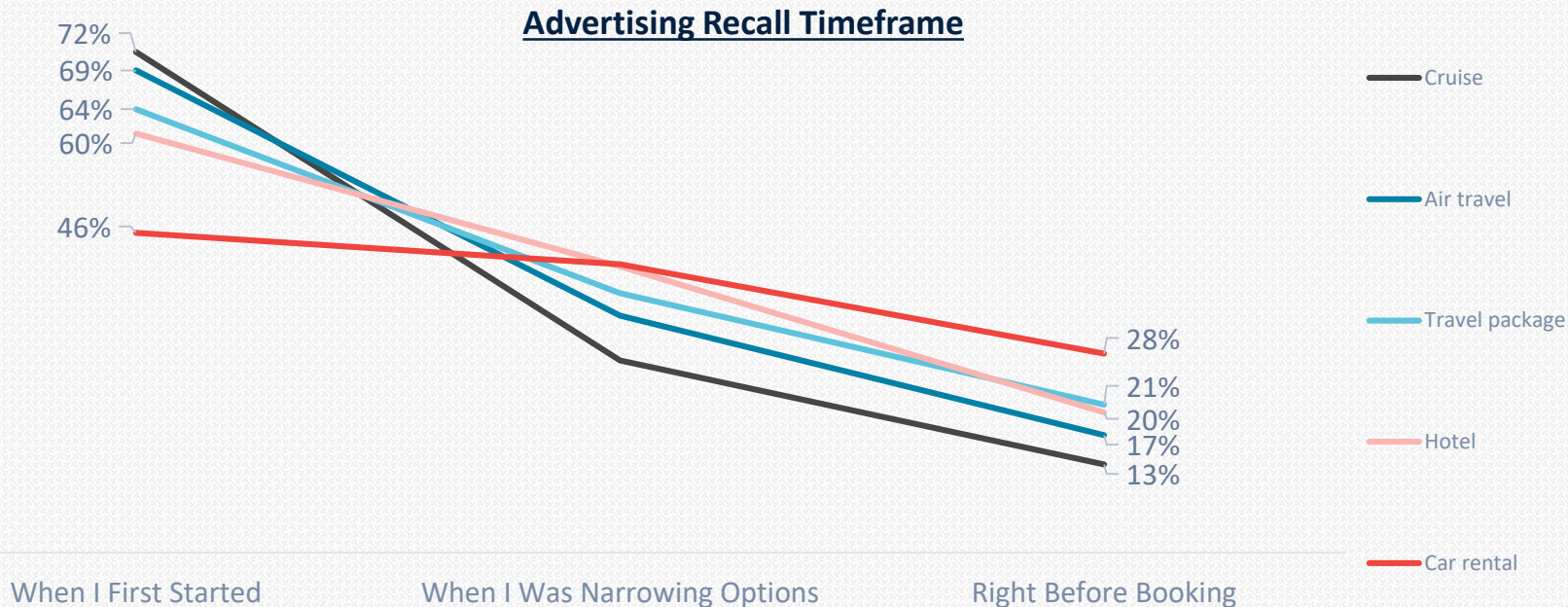
Destination Influenced by Advertising



Data Source: comScore Survey, ADRECALL. % YES - IN THE PAST 30 DAYS, HAVE YOU SEEN OR HEARD ADVERTISING FOR SPECIFIC TRAVEL DESTINATIONS?, Among Total CA Online Travel Bookers – By Age
DESTINATIONAD. % YES - DID ANY ADVERTISING INFLUENCE YOUR DECISION TO VISIT?, Among Total CA Online Travel Bookers – By Age
A/B/C letters indicate a significant difference between groups at a 95% confidence level.



ADVERTISING RECALL IS AT ITS HIGHEST AT THE BEGINNING STAGES OF TRAVEL RESEARCH, REGARDLESS OF SERVICE TYPE.

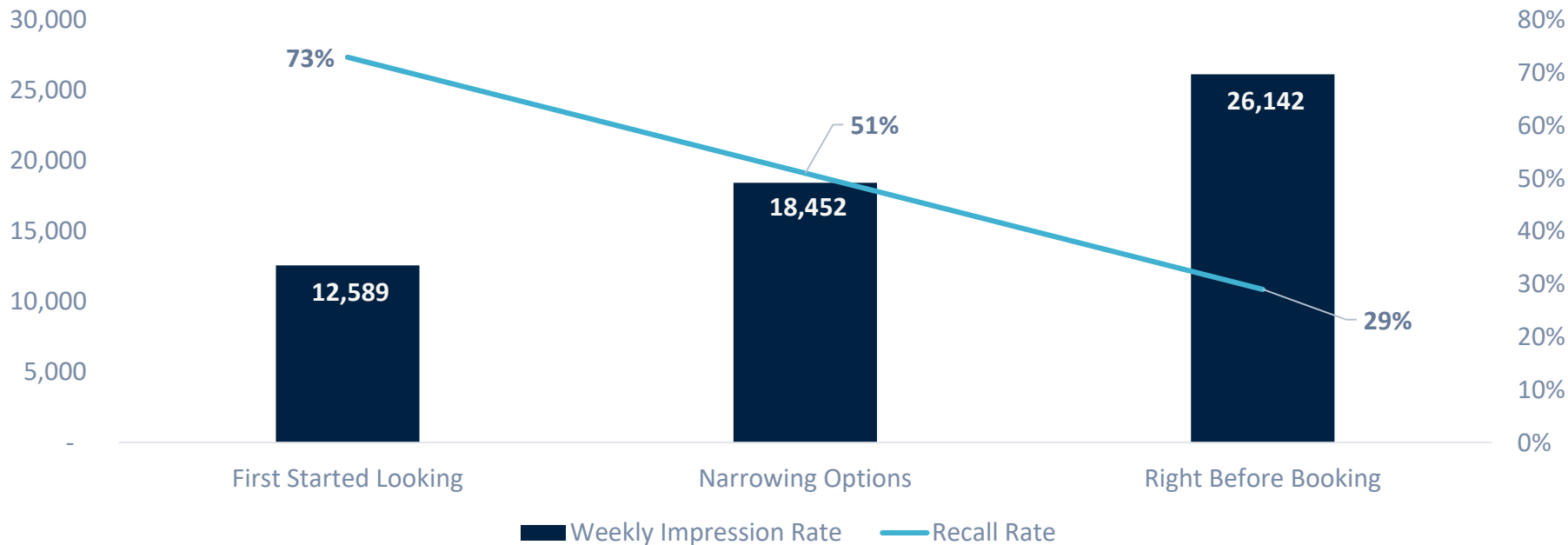


Data Source: comScore Survey, ADNOTICE. WHEN DID YOU NOTICE ADVERTISING RELATED TO EACH TRAVEL SERVICE?,
Among CA Online Travel Bookers Who Noticed Ads for Each Service (n=140-354)



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.



THANK YOU

DOWNLOAD THE STUDY

<http://bit.ly/travelers-path-to-purchase>



COMSCORE.

www.advertising.expedia.com