

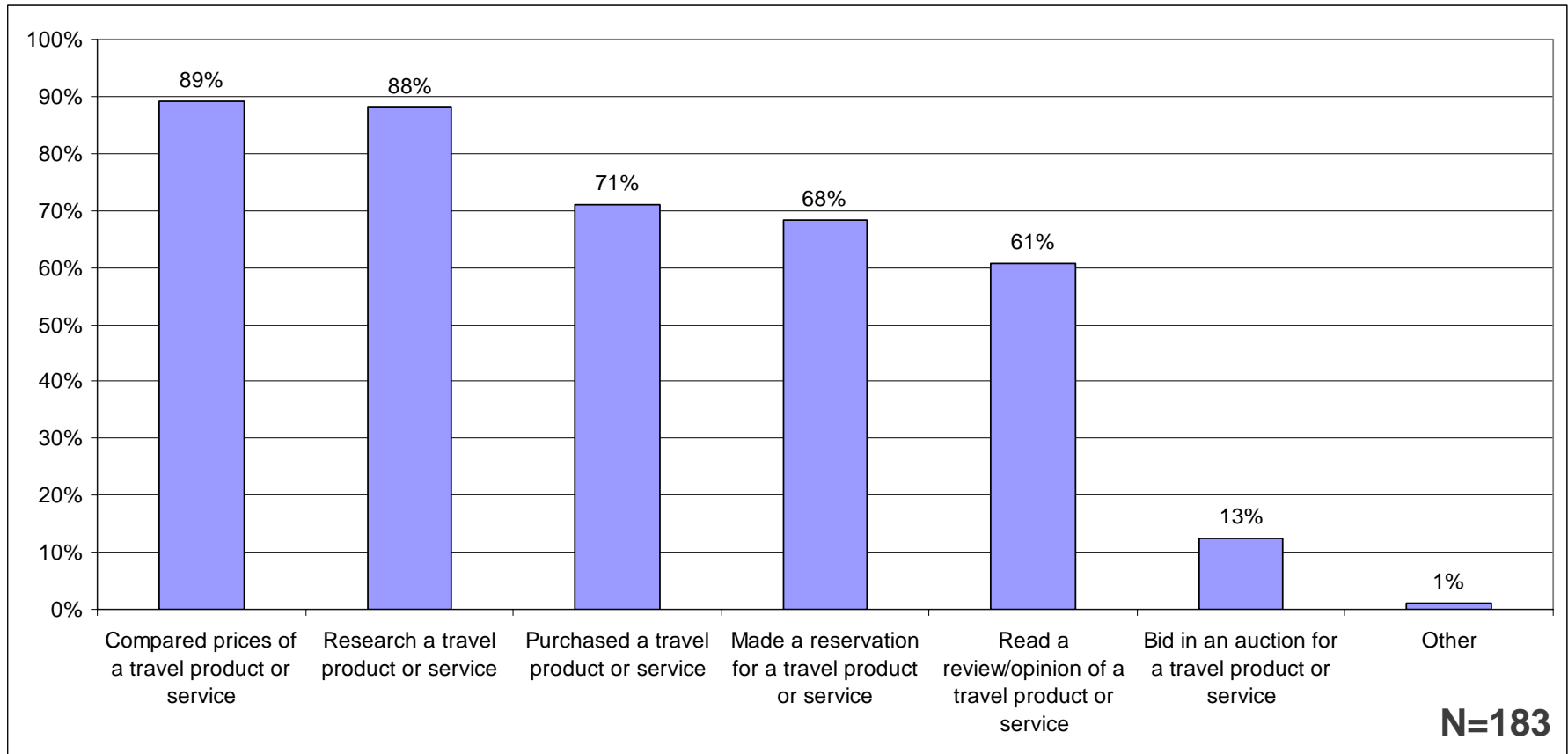
We surveyed a total of 300 consumers that use the web to research travel-related products, services and information

- A custom survey instrument (questionnaire) was developed to measure respondents' use of the web, and search engines in particular, for researching and purchasing Travel Products and Services
- The survey was conducted online, through a web-based interviewing process, in March 2005
- Our sample is evenly distributed across all age groups and genders
- Respondents were recruited through a variety of methods: web advertising, permission-based databases, public relations, telephone recruitment, partner-recruited panels, and alliances with heavily trafficked portals
- The survey was designed and administered by Global Market Insite (GMI) and Media-Screen, an independent strategic market research firm

Executive Summary

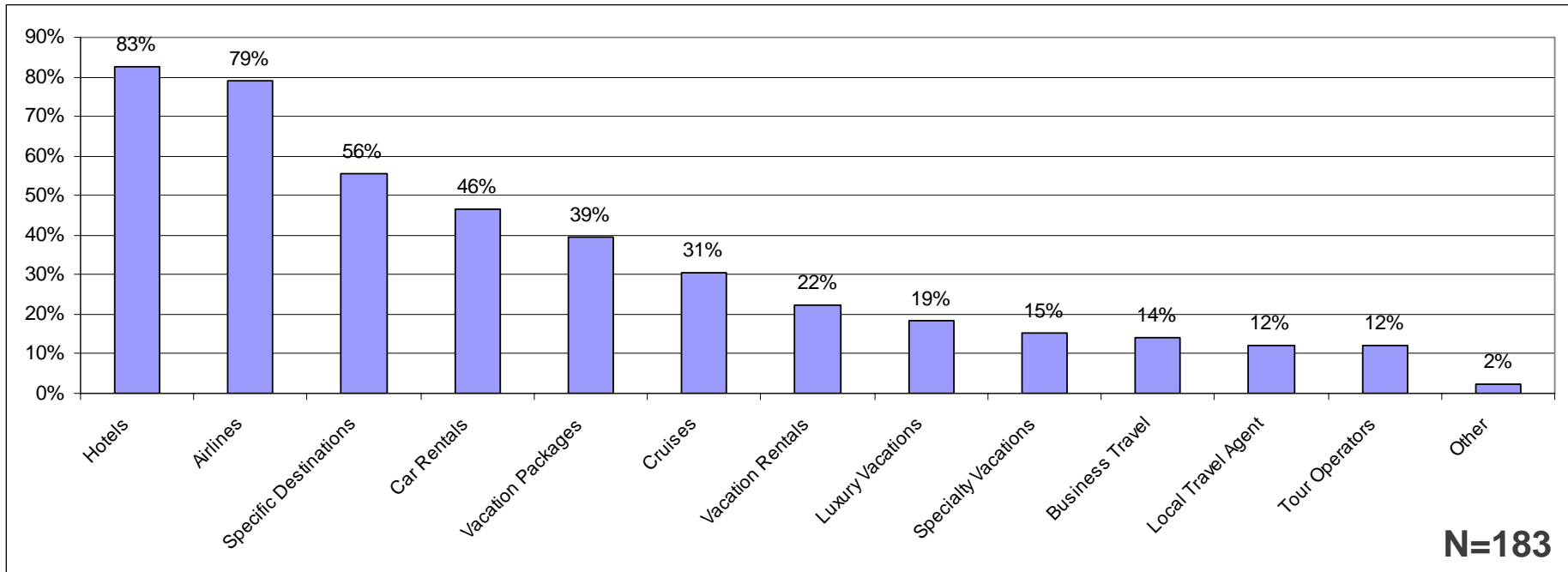
- Nearly three-quarters (74%) of all respondents have **used a search engine** when researching/purchasing travel products or services online
- Search engine usage:
 - Almost **three-fourths (70%)** of Google users report using a search engine for **more than half** of their travel-related research
 - Most Google users use a search engine to help them **compare prices (81%)** and/or **conduct research** for travel products or services **(80%)**
 - A **larger majority** of Google users access travel information using a **search engine (85%)** than by typing in a **web address (69%)**
- The **vast majority (82%)** of these respondents **use Google** to search for these products
- **Three quarters (76%)** of Google users say search engines are **very/somewhat important** for making travel purchase decisions
- Across all resources – **online and offline** – **search engines** are the most popular resource for Google users for researching/purchasing travel products, services and information

The vast majority of Google users have compared prices (89%) and/or researched (88%) a travel product or service online



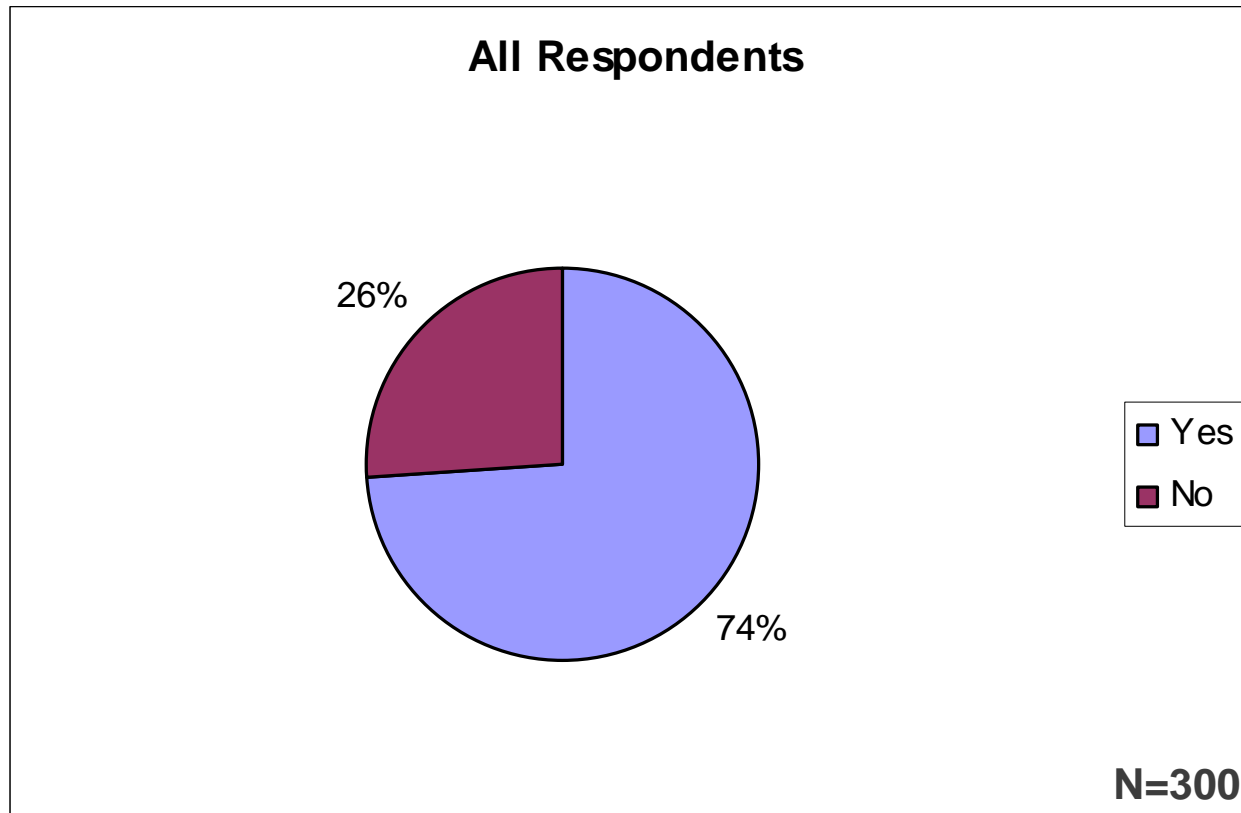
Have you ever done any of the following online? Please select all that apply.

The vast majority of Google users researched/purchased hotel (83%) and/or airline (79%) information/products and services online



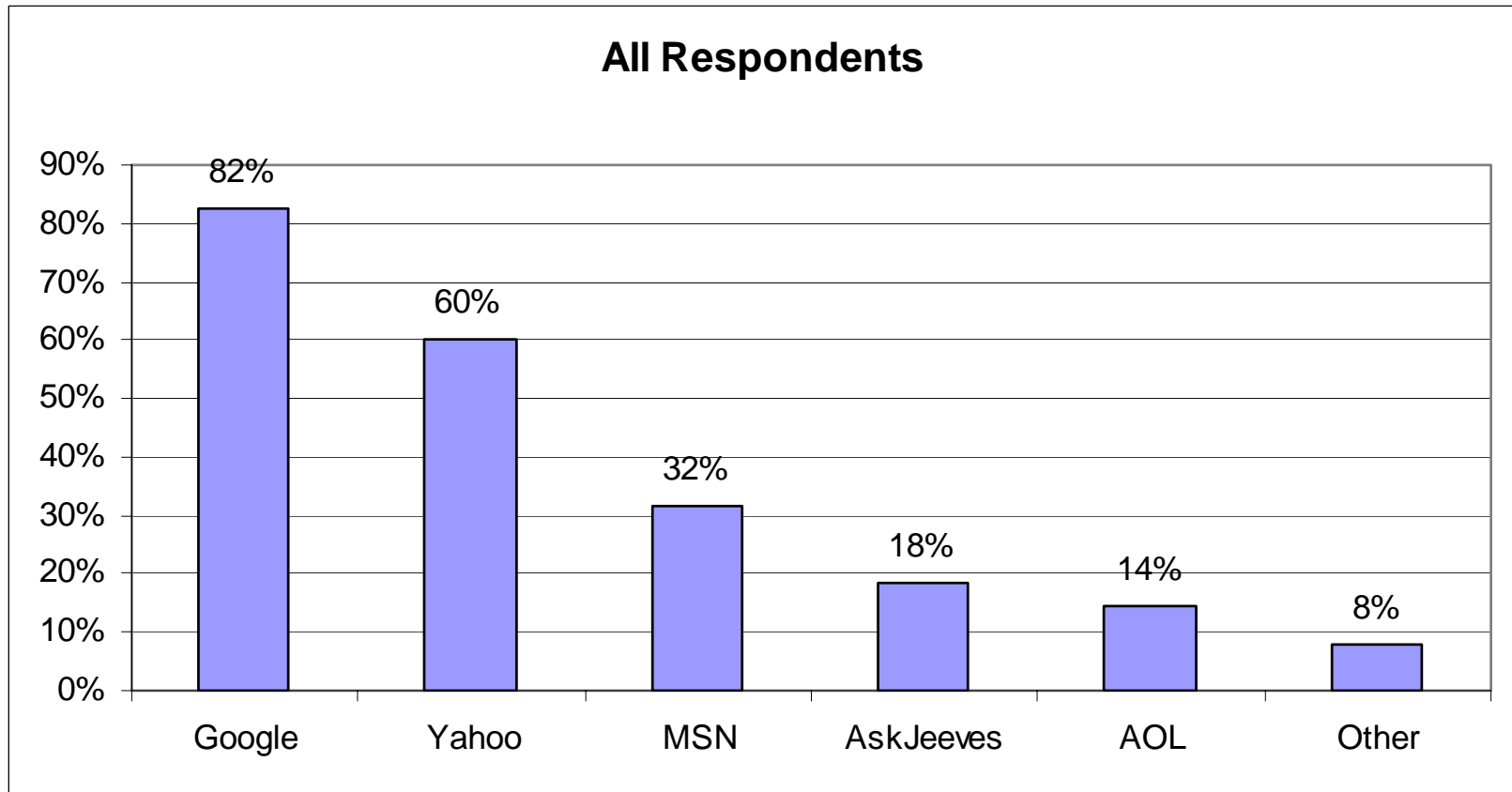
You indicated that you have researched and/ or purchased a travel product, service or information online. What kinds of travel products, services or information did you research or purchase? Select all that apply.

Nearly three-quarters (74%) of all respondents have used a search engine when researching/purchasing travel products or services online



Do you ever use a search engine (such as Google, Yahoo, or Ask Jeeves) when you research or purchase travel product or service online?

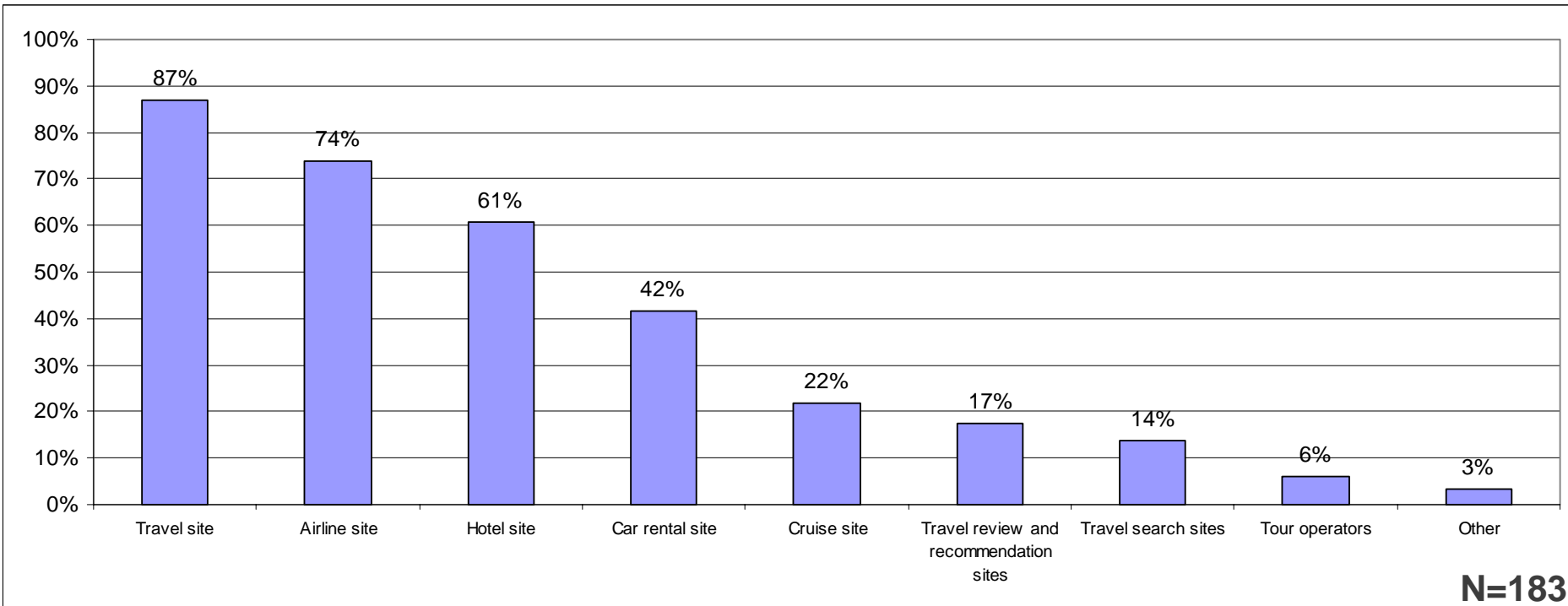
Used by 82% of all respondents, Google is the most popular search engine for researching Travel Products & Services



N=222

Which of the following search engines do you use? Please select all that apply.

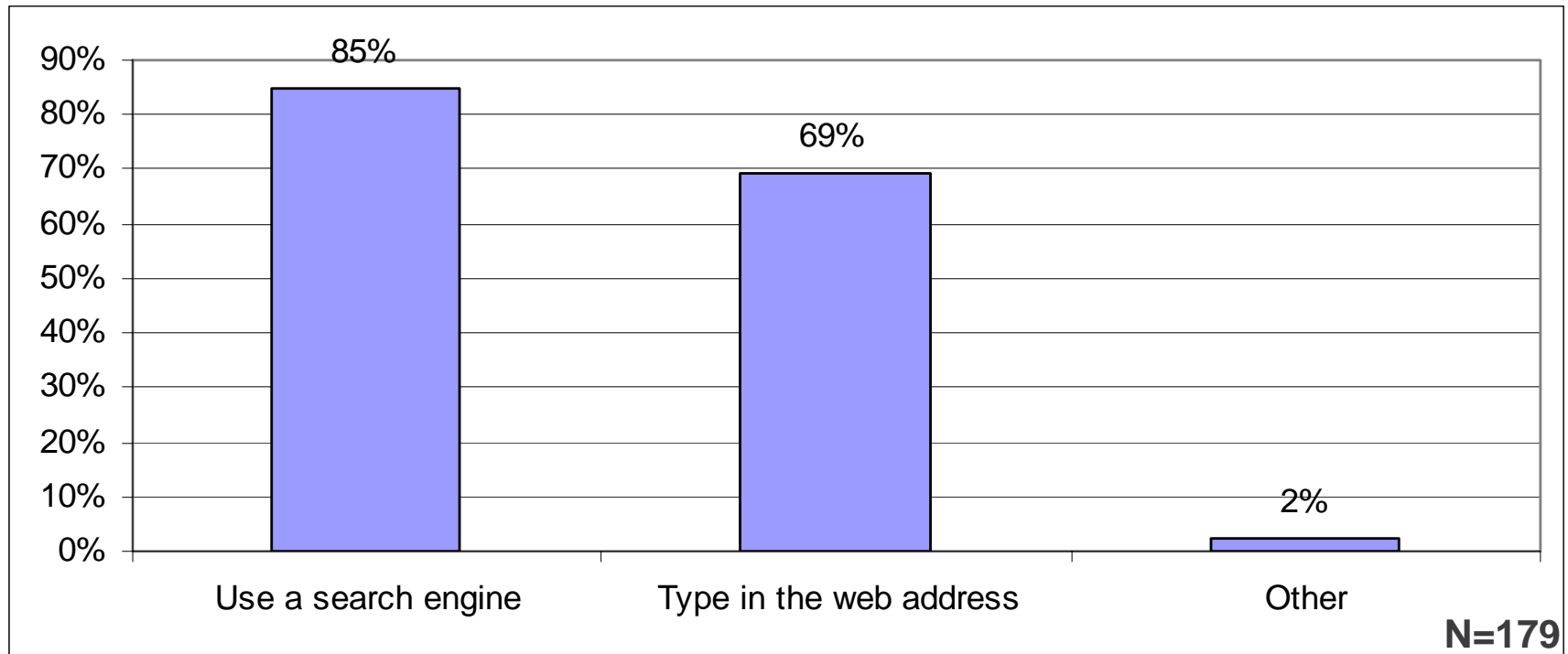
In addition to search engines, a great majority (87%) of Google users also use Travel sites (*Expedia, Travelocity, etc.*) when looking for travel information



In addition to search engines, what other kinds of sites do you use when looking for travel information online? Please select all that apply.

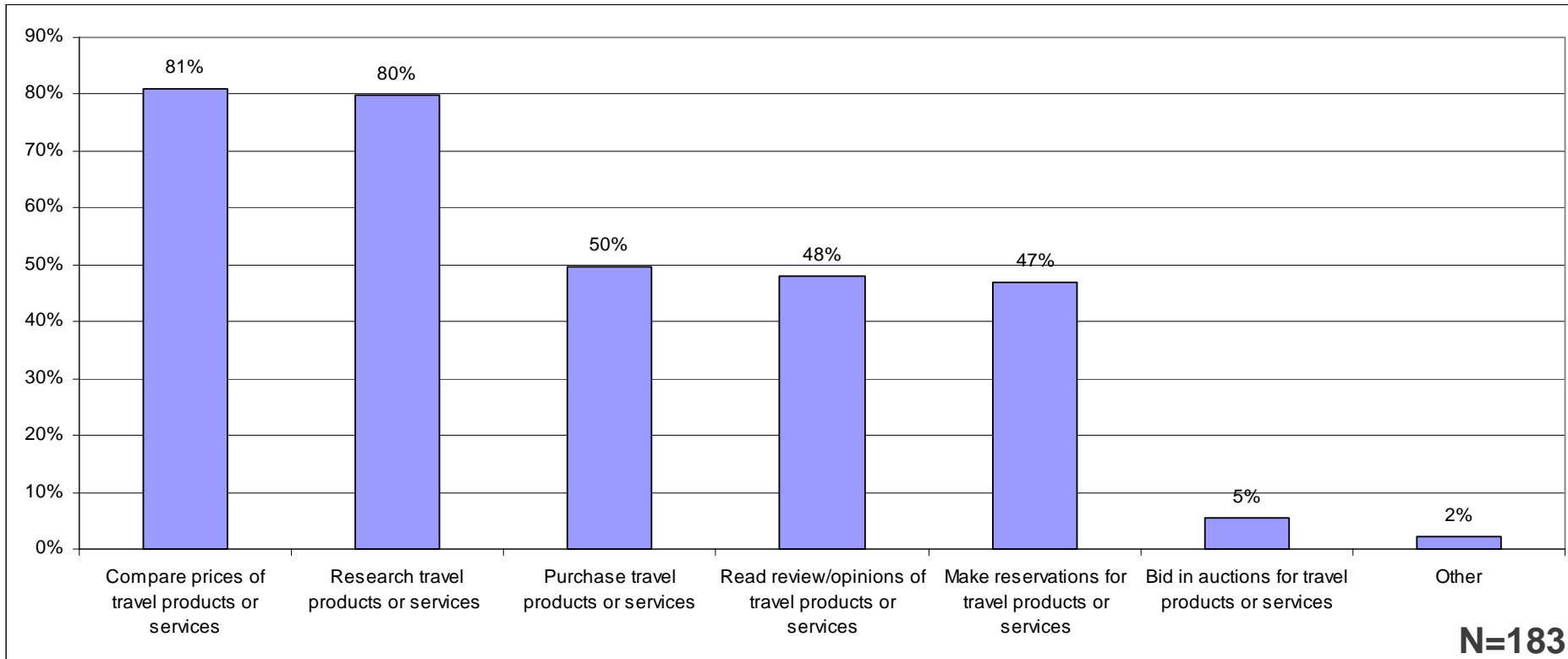
Source: 2005 Travel Survey, conducted by GMI and Media-Screen (Mar. 2005)

A larger majority of Google users access travel information sites using a search engine (85%) than by typing in a web address (69%)



When you want to go to a certain site for travel information online, how do you get there?
Select all that apply

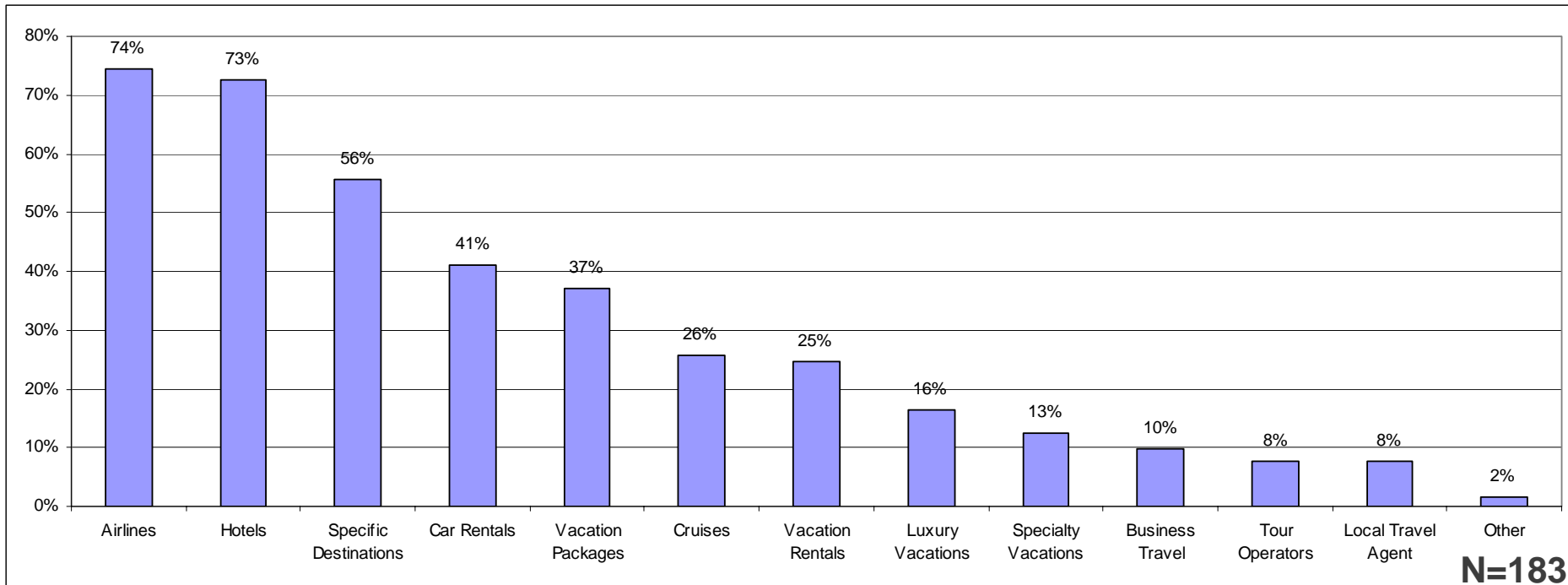
Most Google users use a search engine to help them compare prices (81%) and/or conduct research for travel products or services (80%)



Which of the following activities do you use a search engine to help you do? Select all that apply:

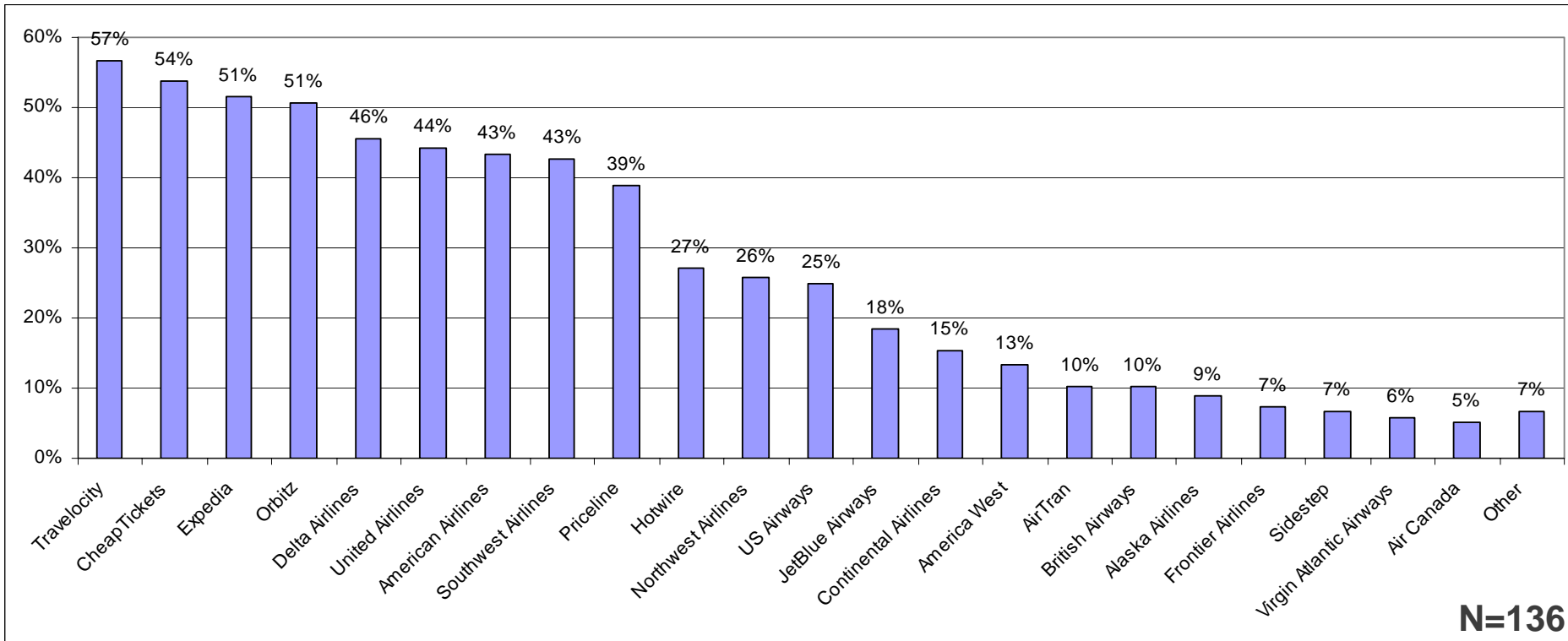
Source: 2005 Travel Survey, conducted by GMI and Media-Screen (Mar. 2005)

Nearly three-quarters (74%) of Google users used a search engine to locate airline sites, while 73% located hotel sites



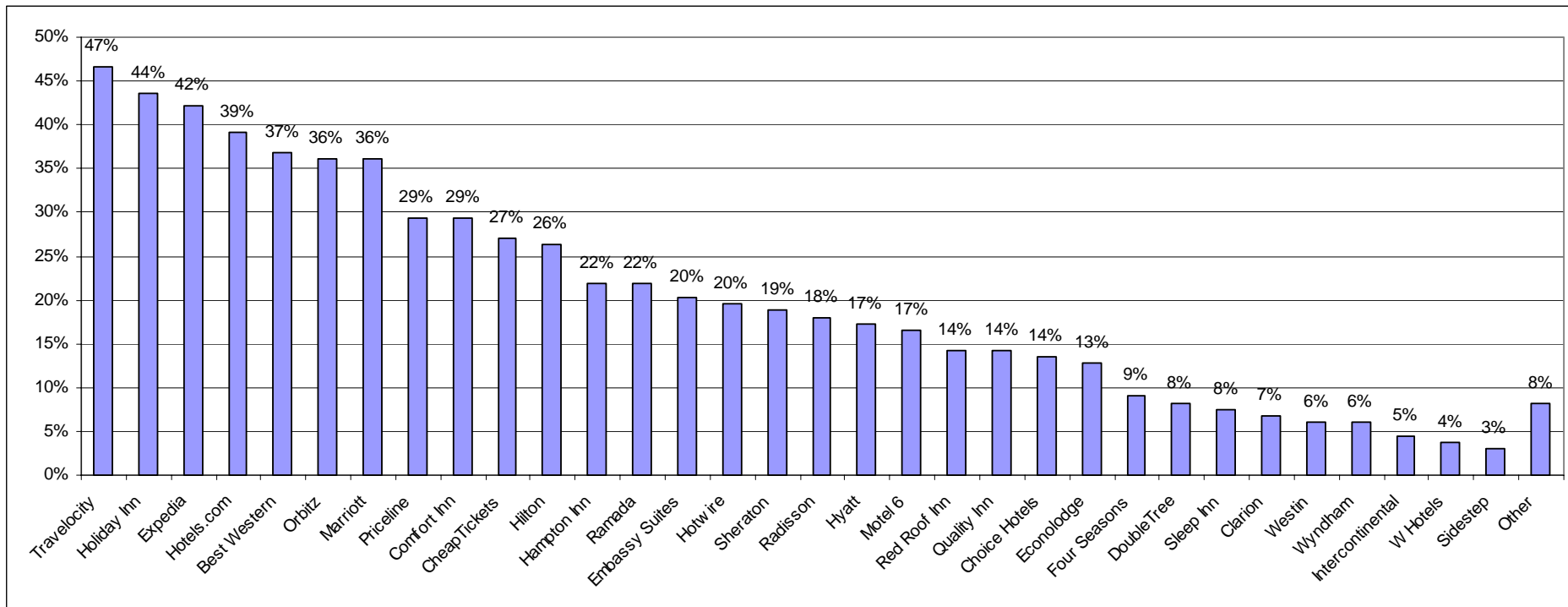
You indicated that you use a search engine to find a certain site for travel information online. For which of the following travel products or services have you used a search engine to help you locate appropriate sites? Select all that apply.

For airline sites, more than half of Google users used a search engine to locate **Travelocity (57%), CheapTickets (54%), Expedia (51%), and/or Orbitz (51%)**



You indicated that you have used a search engine to find **airline sites**. Please tell us which sites you have used a search engine to find. Select all that apply.

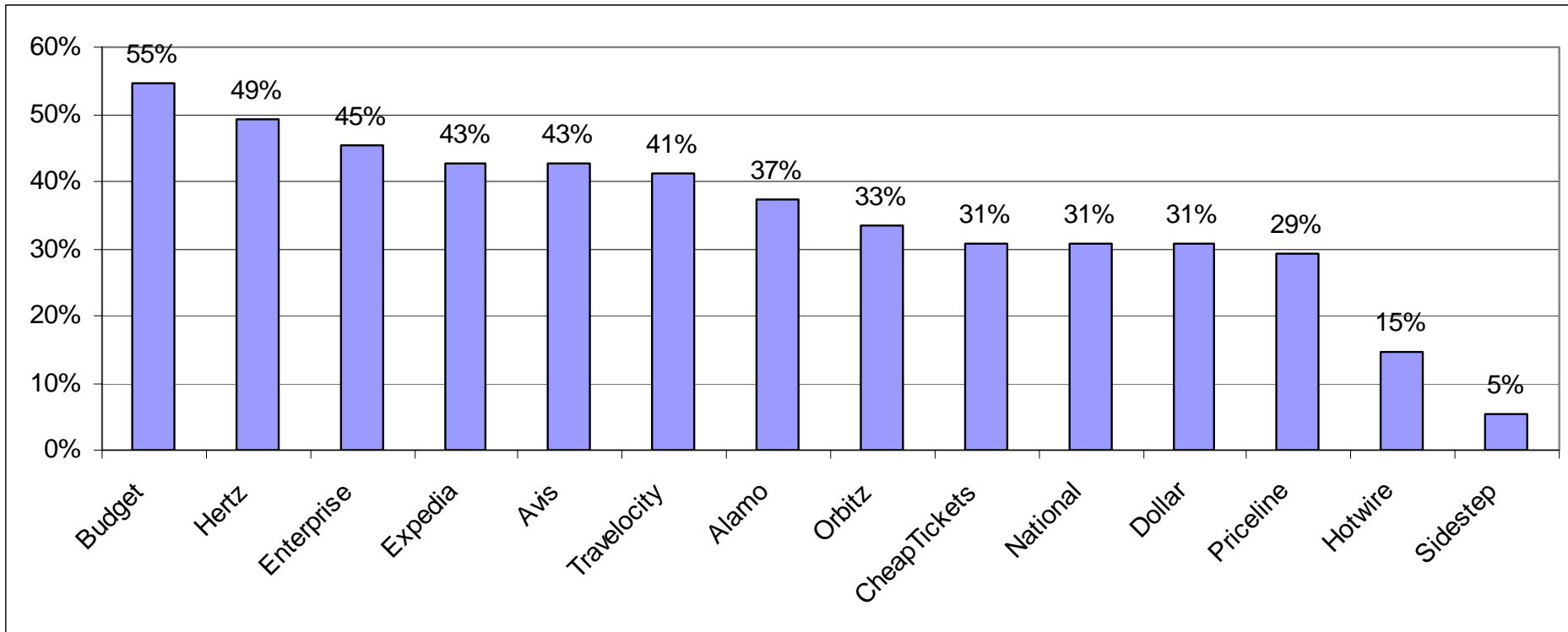
When locating hotel sites, nearly half of Google users used a search engine to find Travelocity (47%), Holiday Inn (44%) and/or Expedia (42%)



N=133

You indicated that you have used a search engine to find **hotel sites**. Please tell us which sites you have used a search engine to find. Select all that apply.

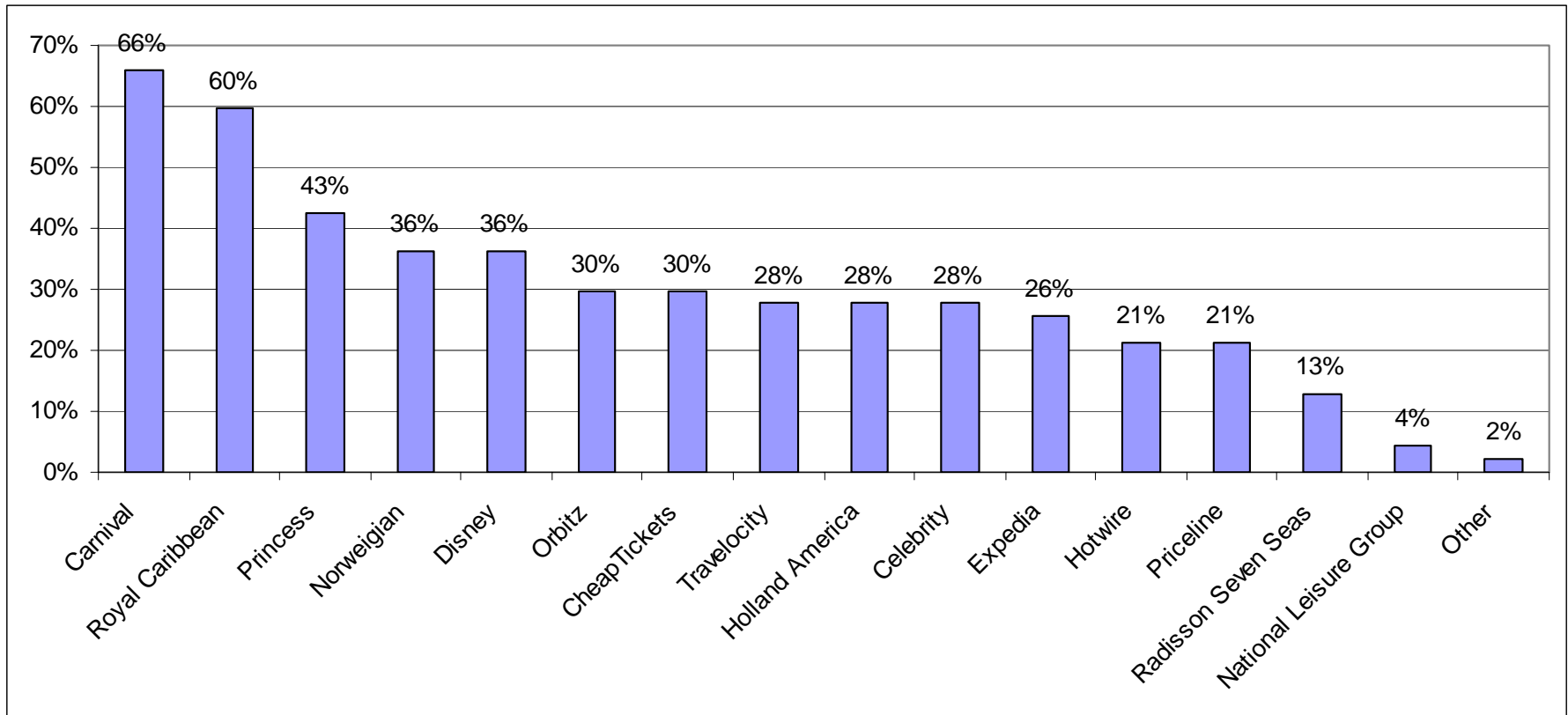
More than half (55%) of Google users used search engines to find Budget. 49% used search engines to find Hertz when looking for car rental sites



N=75

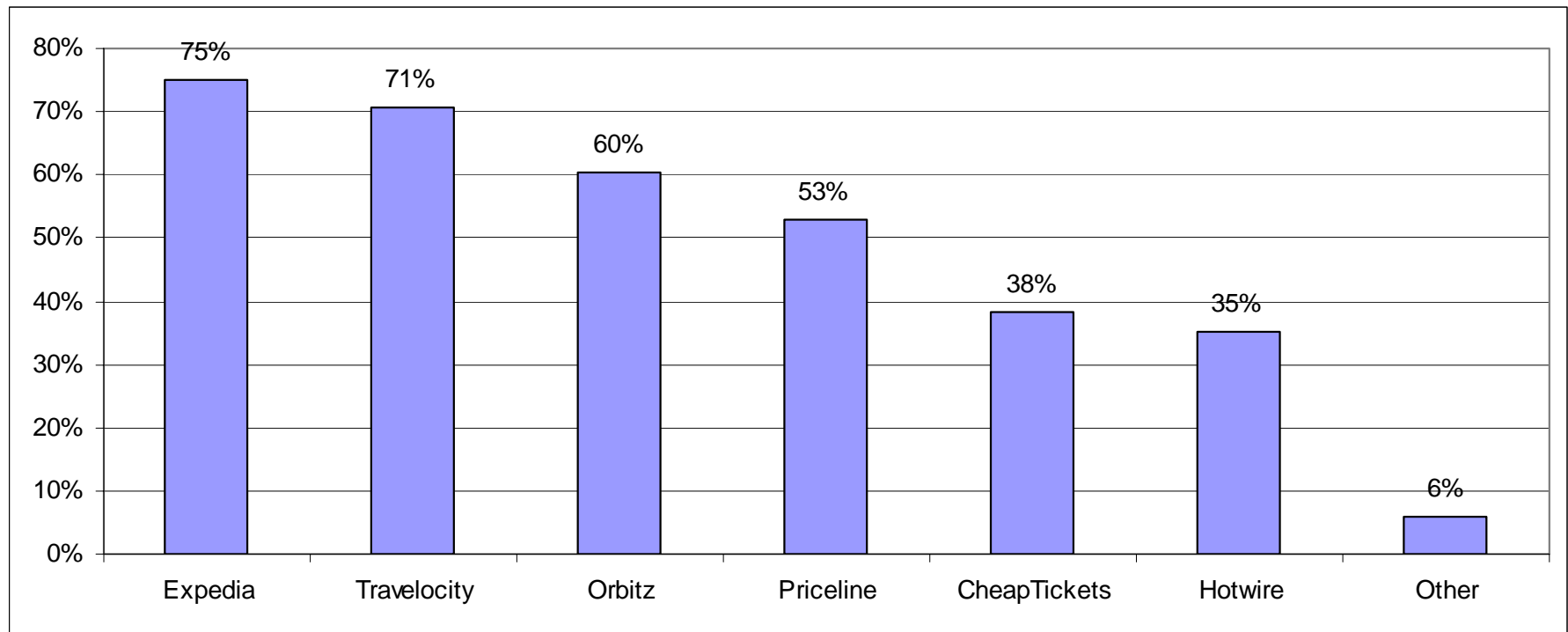
You indicated that you have used a search engine to find **car rental sites**. Please tell us which sites you have used a search engine to find. Select all that apply

A majority of Google users used a search engine to find **Carnival (66%)** and/or **Royal Caribbean (60%)** when looking for cruise sites



You indicated that you have used a search engine to find **cruise sites**. Please tell us which cruise lines for which you have conducted research. Select all that apply **N=47**

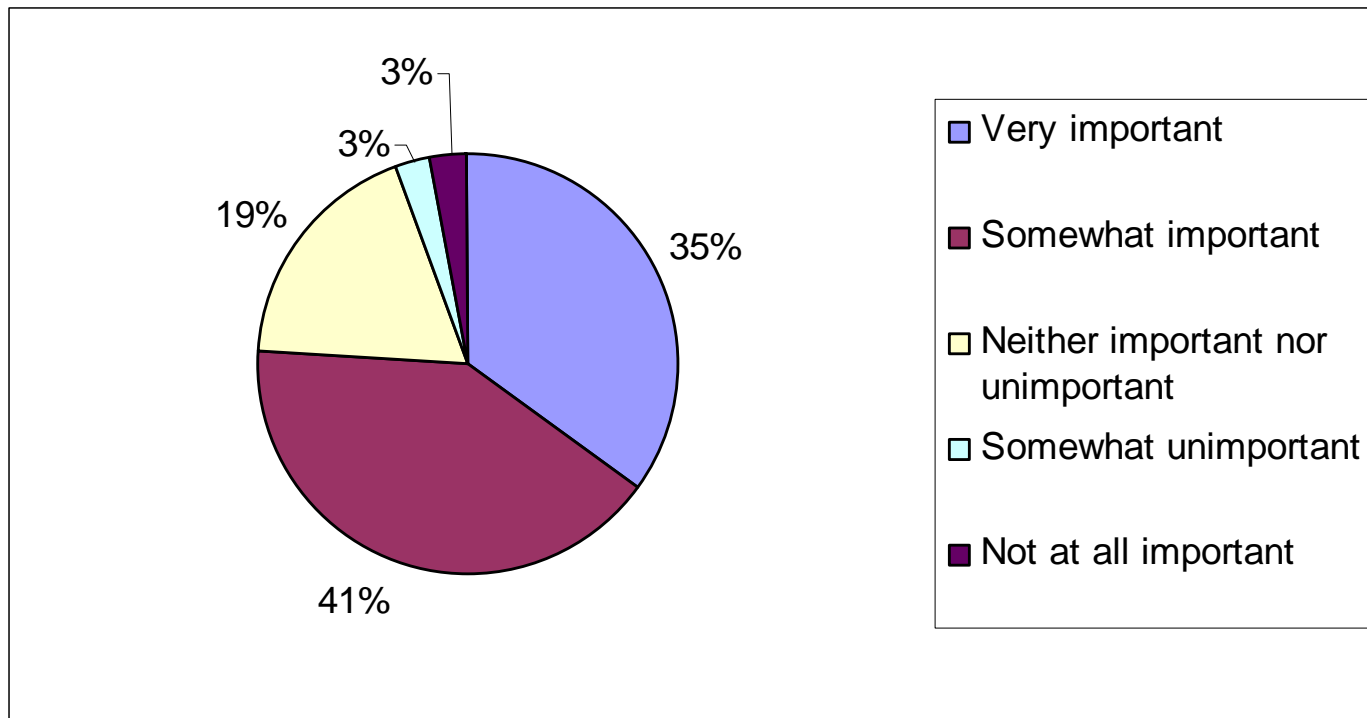
Three-quarters (75%) of Google users used a search engine to locate Expedia while 71% found Travelocity when looking for vacation packages



N=68

You indicated that you have used a search engine to find **vacation packages**. Please tell us which sites you have used a search engine to find. Select all that apply.

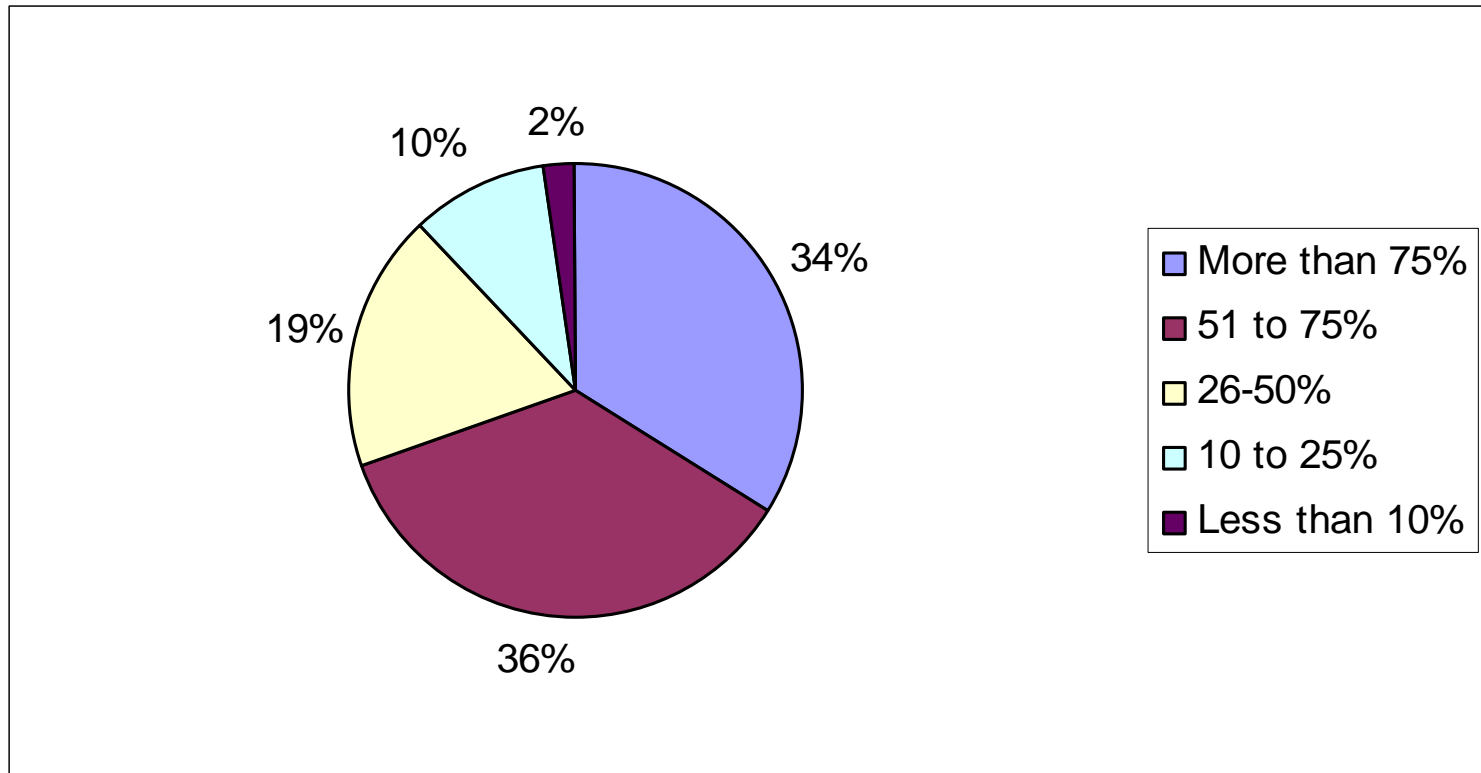
Three-quarters (76%) of Google users say search engines are very/somewhat important for making travel purchase decisions



N=183

You indicated you used a search engine to help find travel products or services. How important was using a search engine in making your purchase decision?

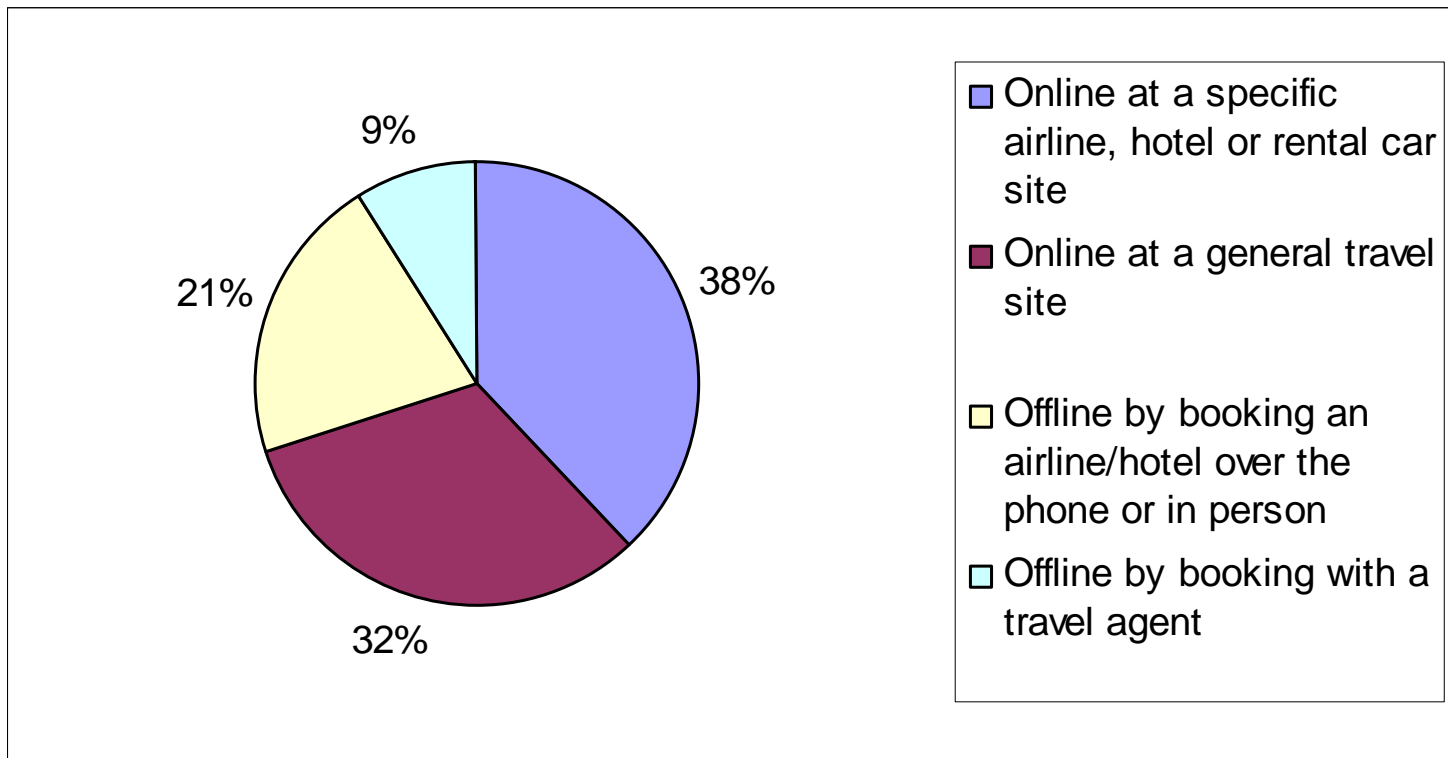
Almost three-fourths (70%) of Google users report using a search engine for more than half of their travel-related research



N=183

Thinking of all your travel-related research as 100%, approximately what percent of your travel-related **research** involved using a search engine?

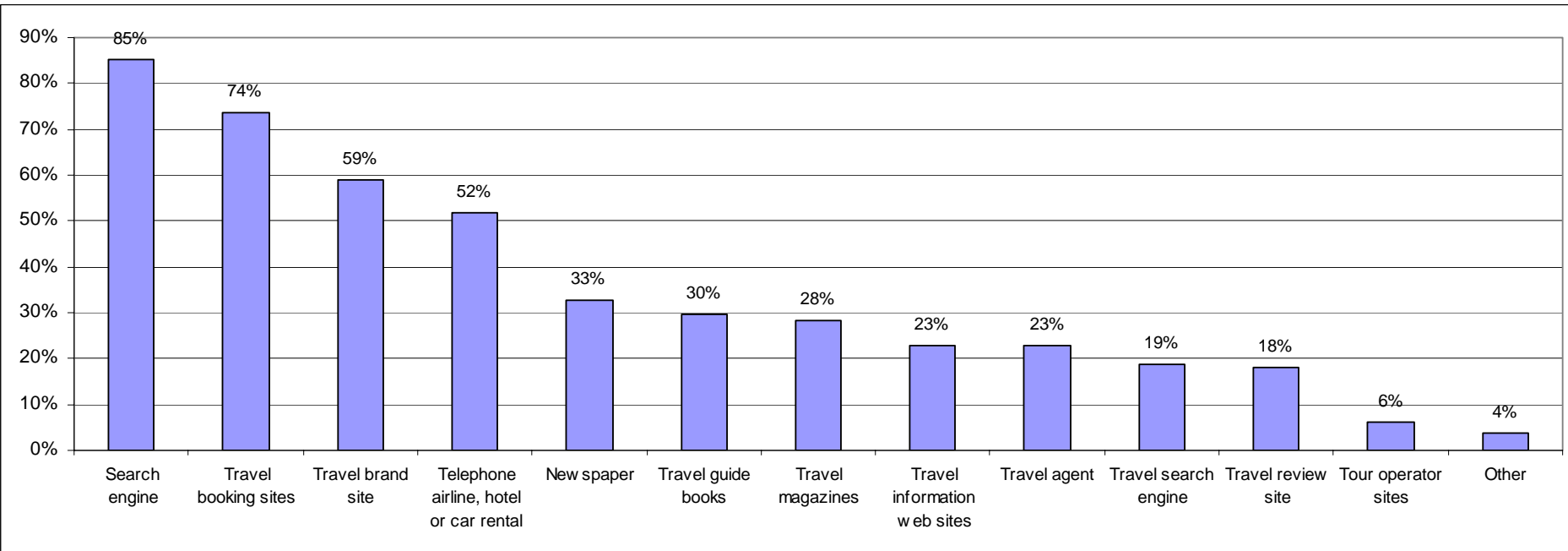
Almost three-fourths (70%) of Google users have made travel-related purchases online, at either specific airline, hotel, or rental car sites or general travel sites



N=183

Thinking of all your travel-related purchases as 100%, what percent of those purchases have you made using each of the following methods? Your answers must add up to 100%.

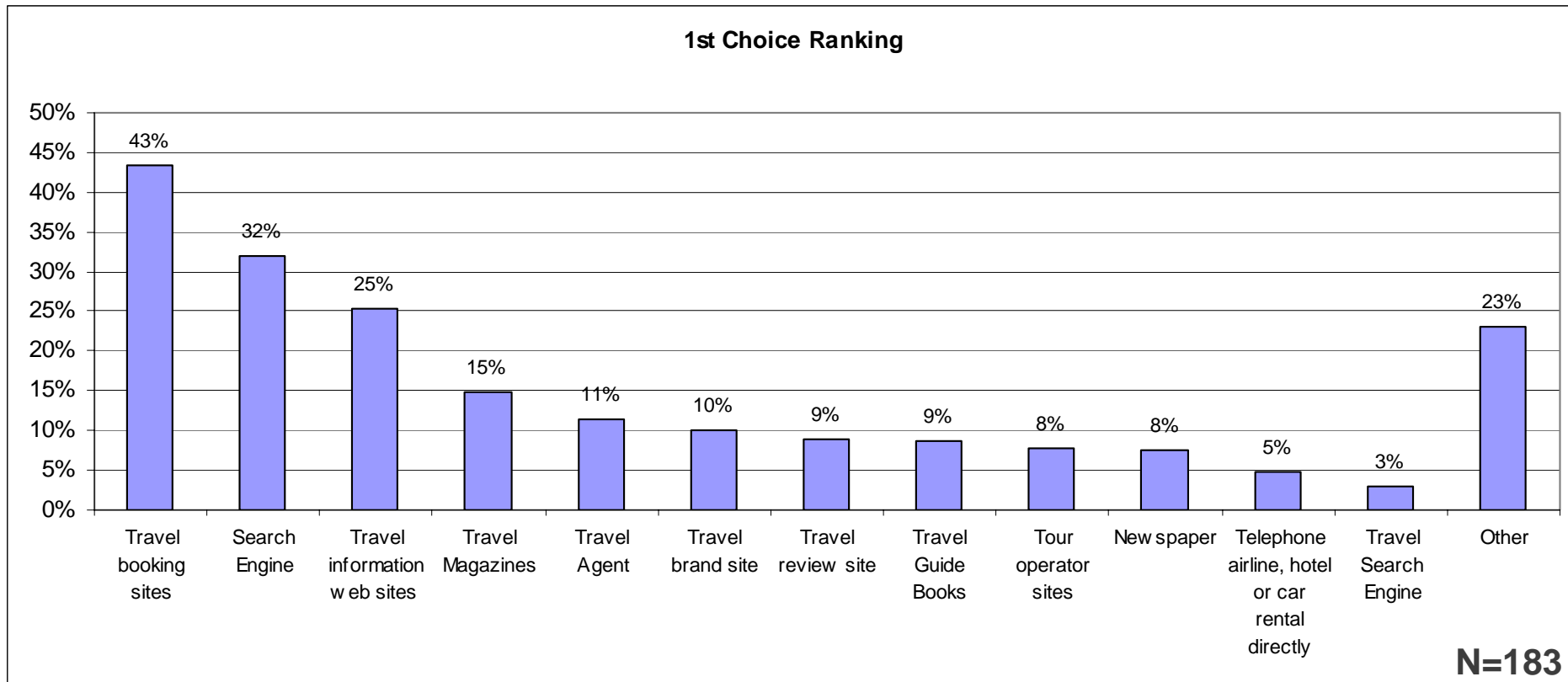
Across all resources – online and offline – search engines are the most popular resource for Google users for researching/purchasing travel products, services and information



N=183

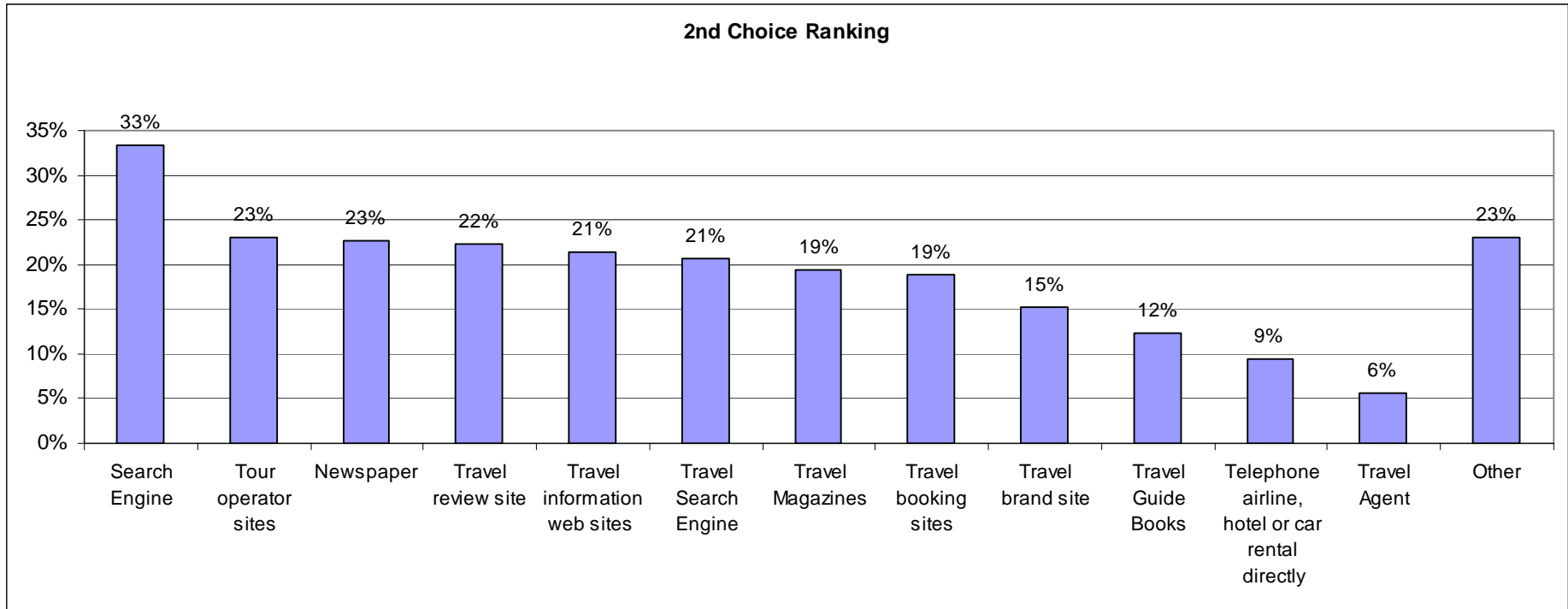
Thinking of **all** resources – including online and offline resources – which of the following resources do you use to research and/or purchase travel products, services and information?
Please select all that apply

For researching destination options, travel booking sites are the first choice for 43% of Google users, while search engines are the first choice for 32% of Google users



Imagine you are thinking about going on vacation but do not have a specific destination in mind. Where do you go to research your options? RANK THEM based on how much you would rely on them to help you.

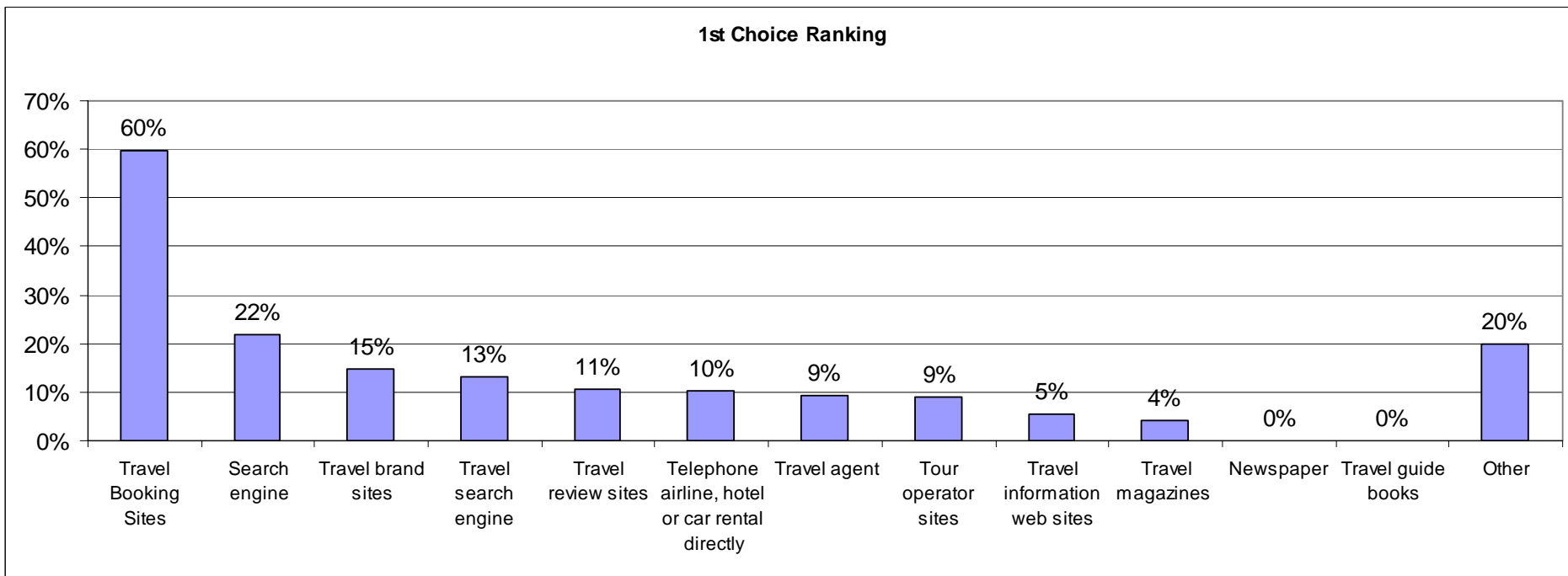
One-third (33%) of Google users say search engines would be their second choice for researching destination options



N=183

Imagine you are thinking about going on vacation but do not have a specific destination in mind. Where do you go to research your options? RANK THEM based on how much you would rely on them to help you.

Search engines are less popular for comparing choices and prices. Still, 22% of Google users say search engines are their first choice for comparing choices and prices

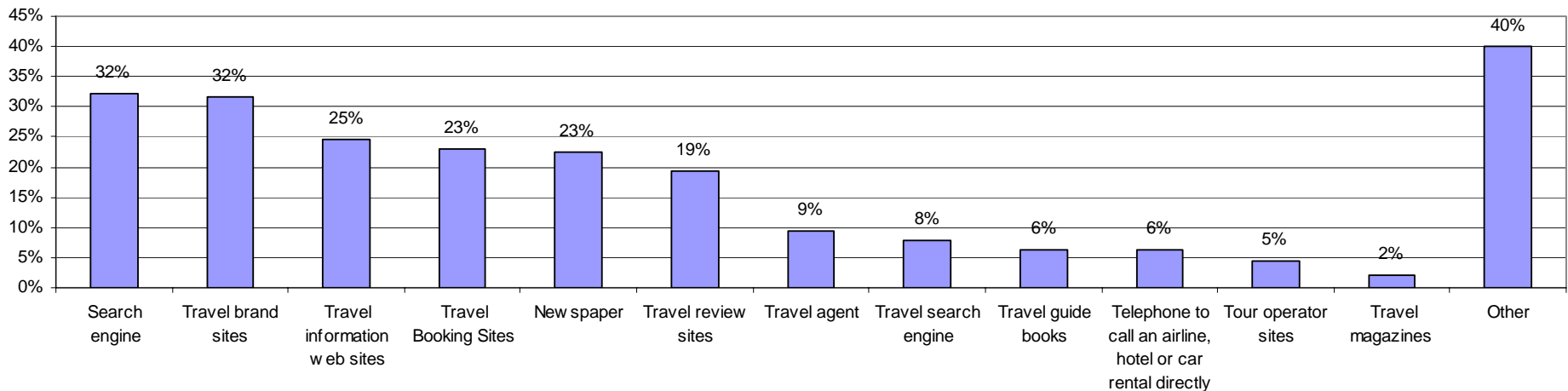


N=183

Now, imagine you have decided where you want to go but need to **compare choices and prices**. Which of the following resources do you use? Please rank five (5) of the resources below based on how much you would rely on them to help you.

One-third (32%) of Google users say search engines would be their second choice for comparing choices and prices

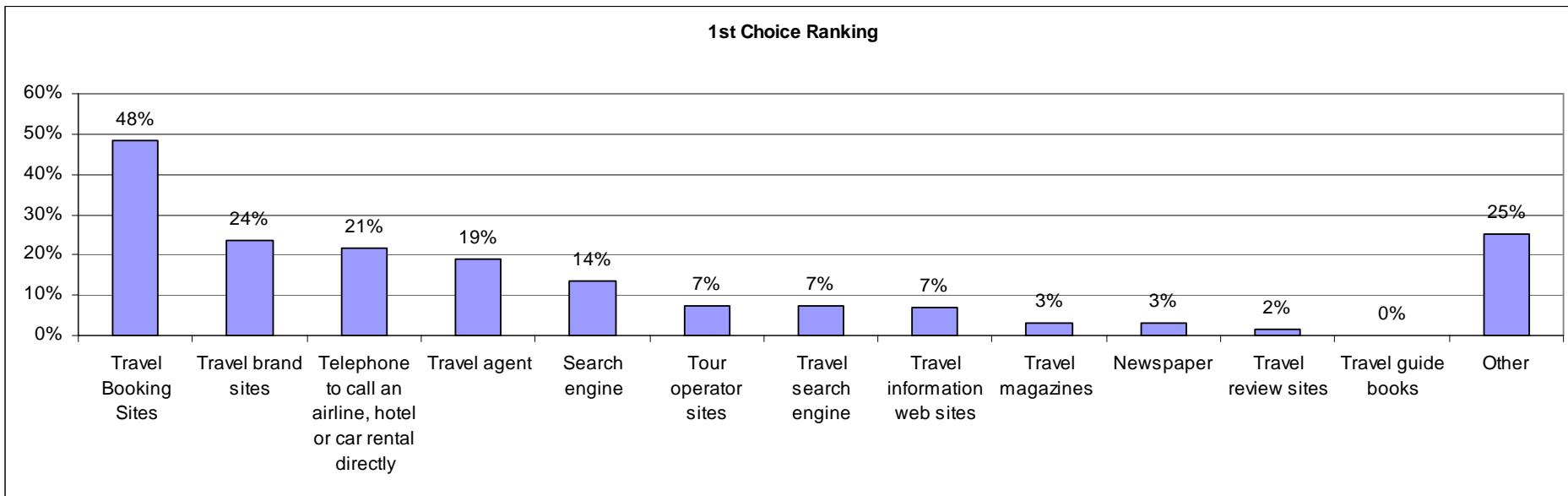
2nd Choice Ranking



N=183

Now, imagine you have decided where you want to go but need to **compare choices and prices**. Which of the following resources do you use? Please rank five (5) of the resources below based on how much you would rely on them to help you.

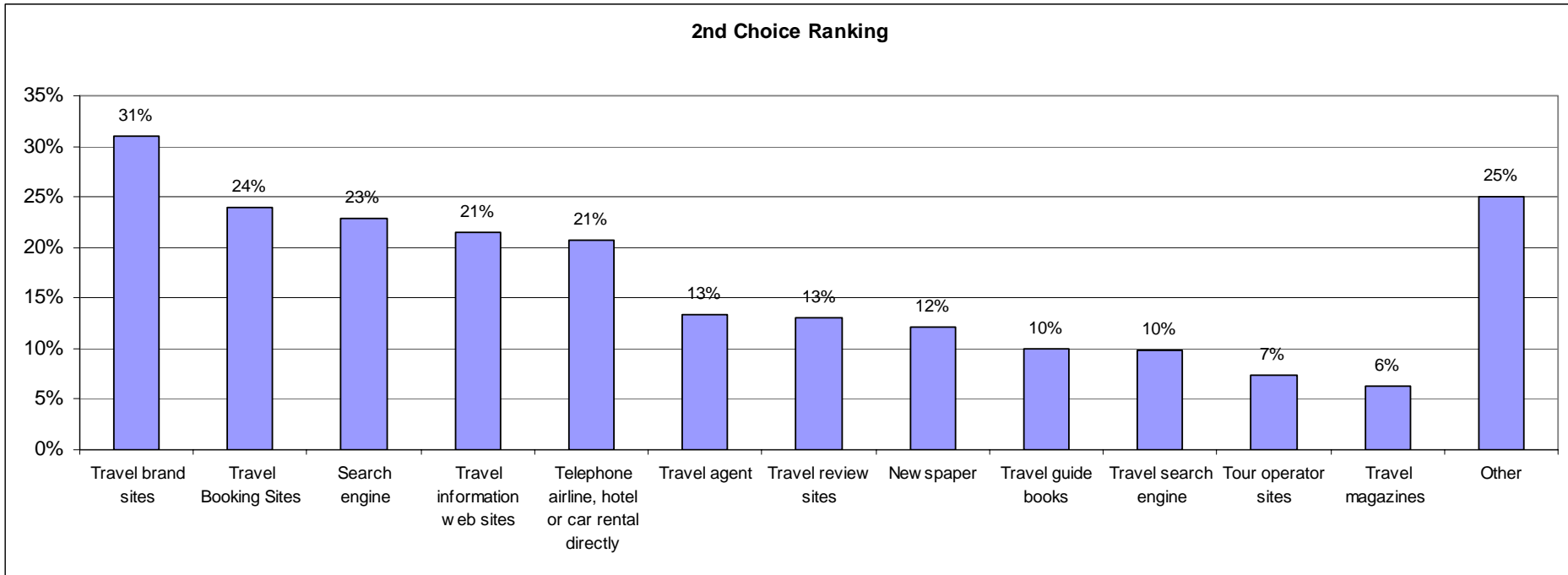
For purchasing a travel vacation, travel booking sites are the first choice for 48% of Google users, while search engines are the first choice for 24% of Google users



N=183

Now, imagine you are about to **purchase your travel vacation**. Which of the following resources do you use? Please rank five (5) of the resources below based on how much you would rely on them to help you.

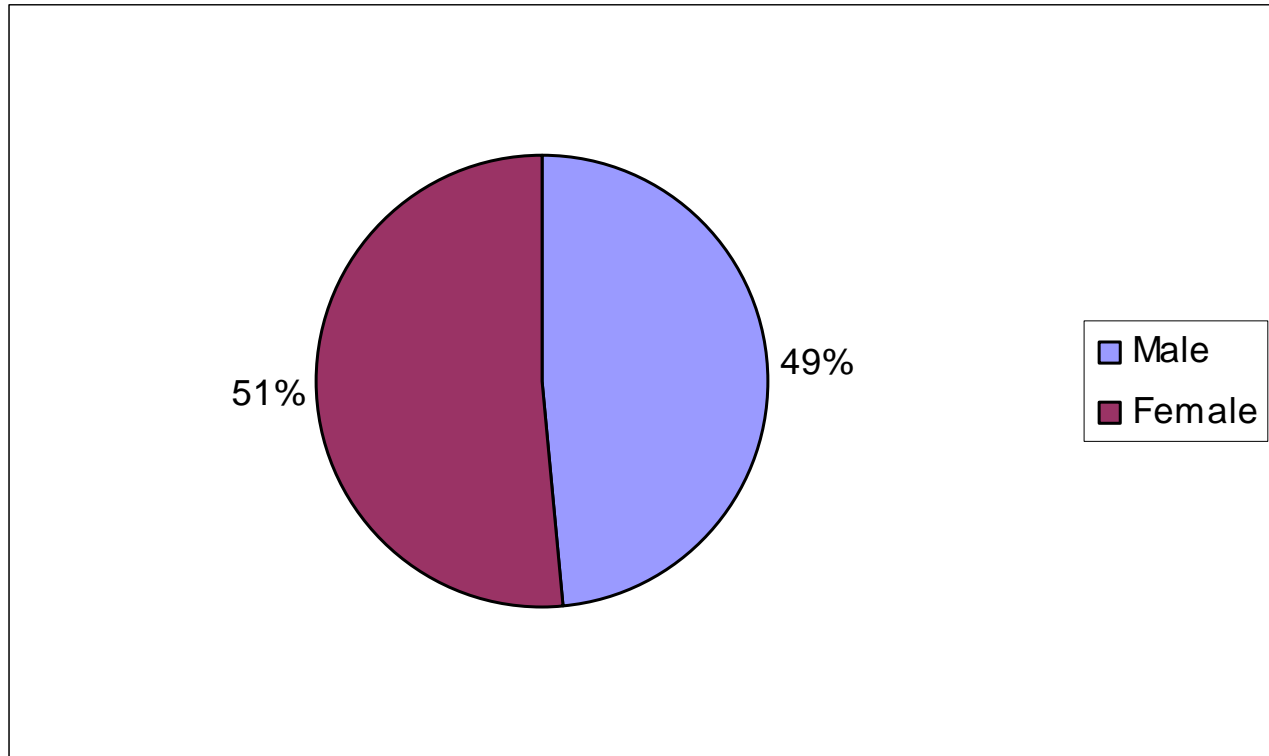
23% of Google users say search engines would be their second choice for purchasing travel vacations, behind travel brand sites (31%) and travel booking sites (24%)



N=183

Now, imagine you are about to **purchase your travel vacation**. Which of the following resources do you use? Please rank five (5) of the resources below based on how much you would rely on them to help you.

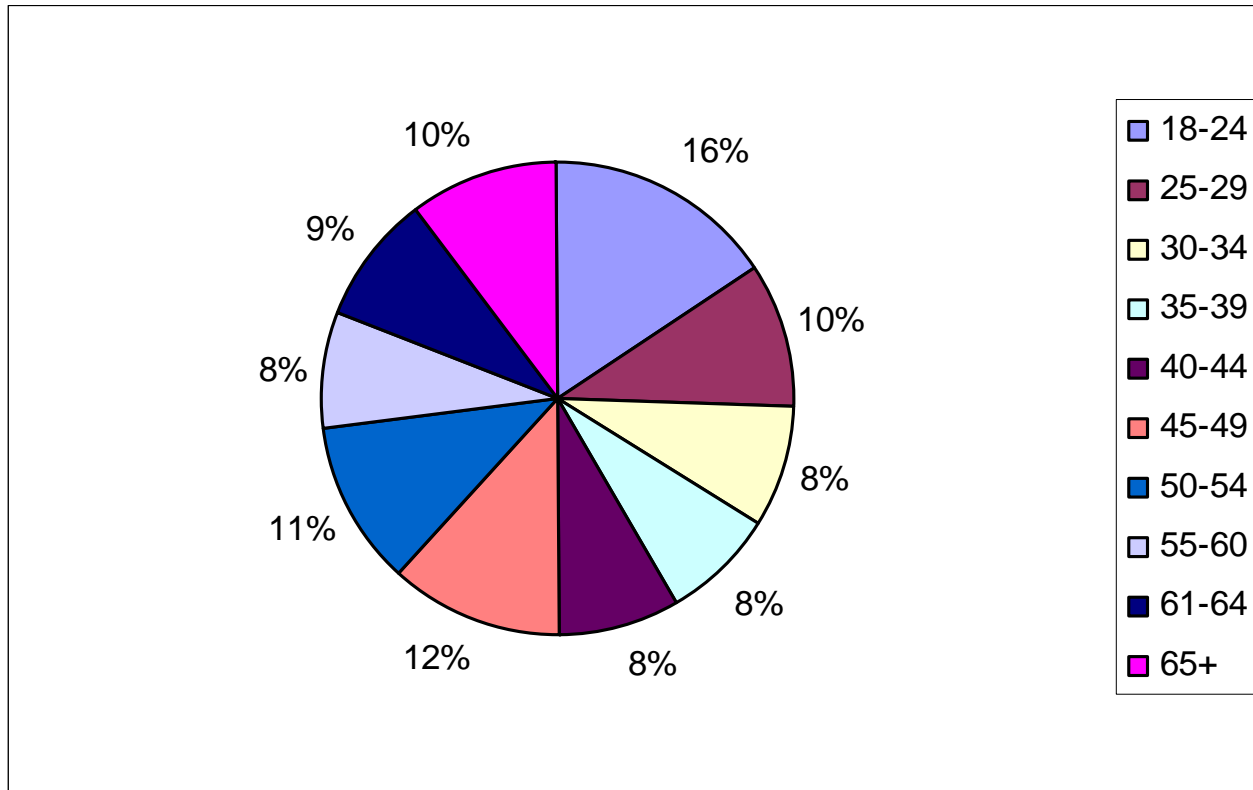
The sample of Google users is evenly divided between men and women



Please indicate your gender.

N=183

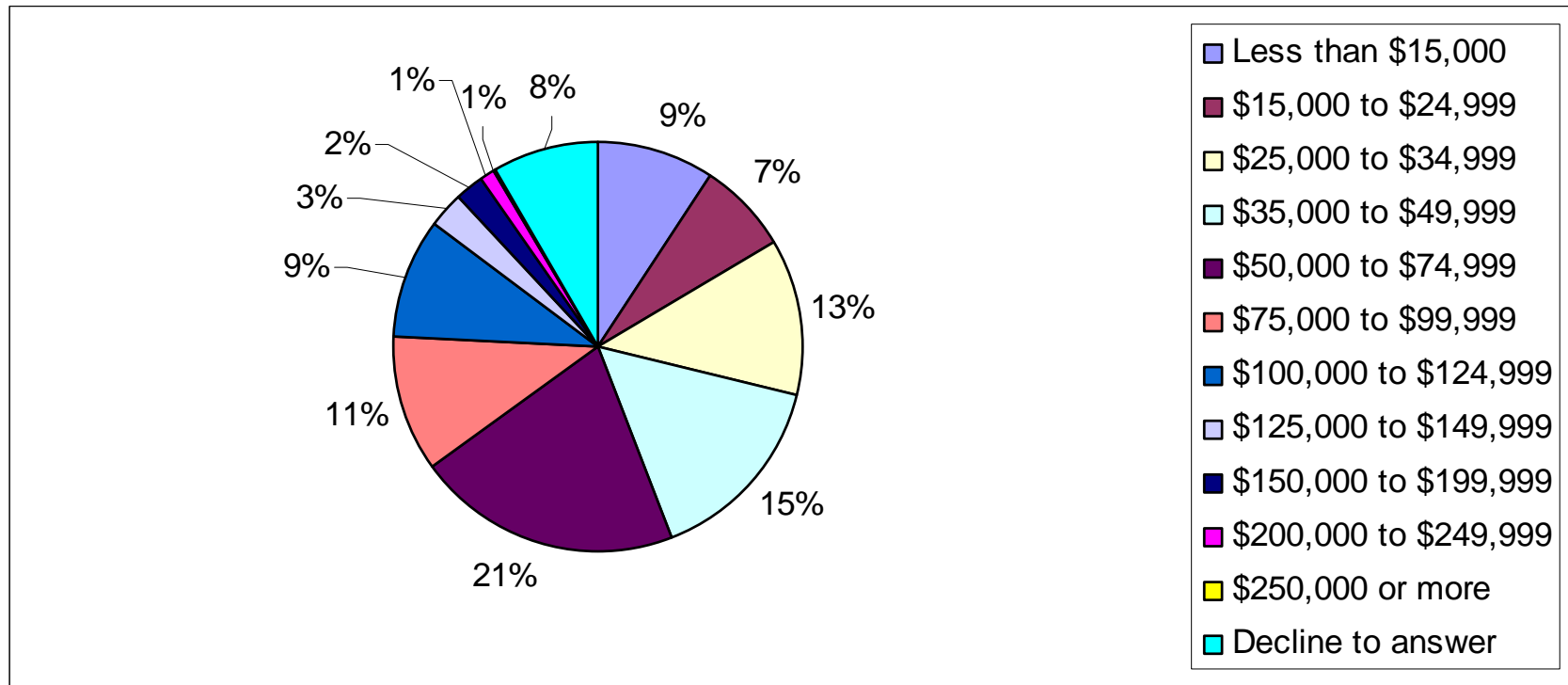
Our sample of Google users is evenly divided across age groups



Please indicate your age.

N=183

41% of participating Google users have annual household incomes of \$50K to \$125K



N=183

Which of the following income categories best describes your total 2004 household income before taxes?