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# Online Travel Research Snapshot: RTONZ Online Marketing Program

**Cathy Schetzina**  
*Senior Research  
Analyst,  
PhoCusWright Inc.*



**Cees Bosselaar**  
*Director, Business  
Development and  
Destination  
Marketing Specialist,  
PhoCusWright Inc.*



**Maximize Influence**



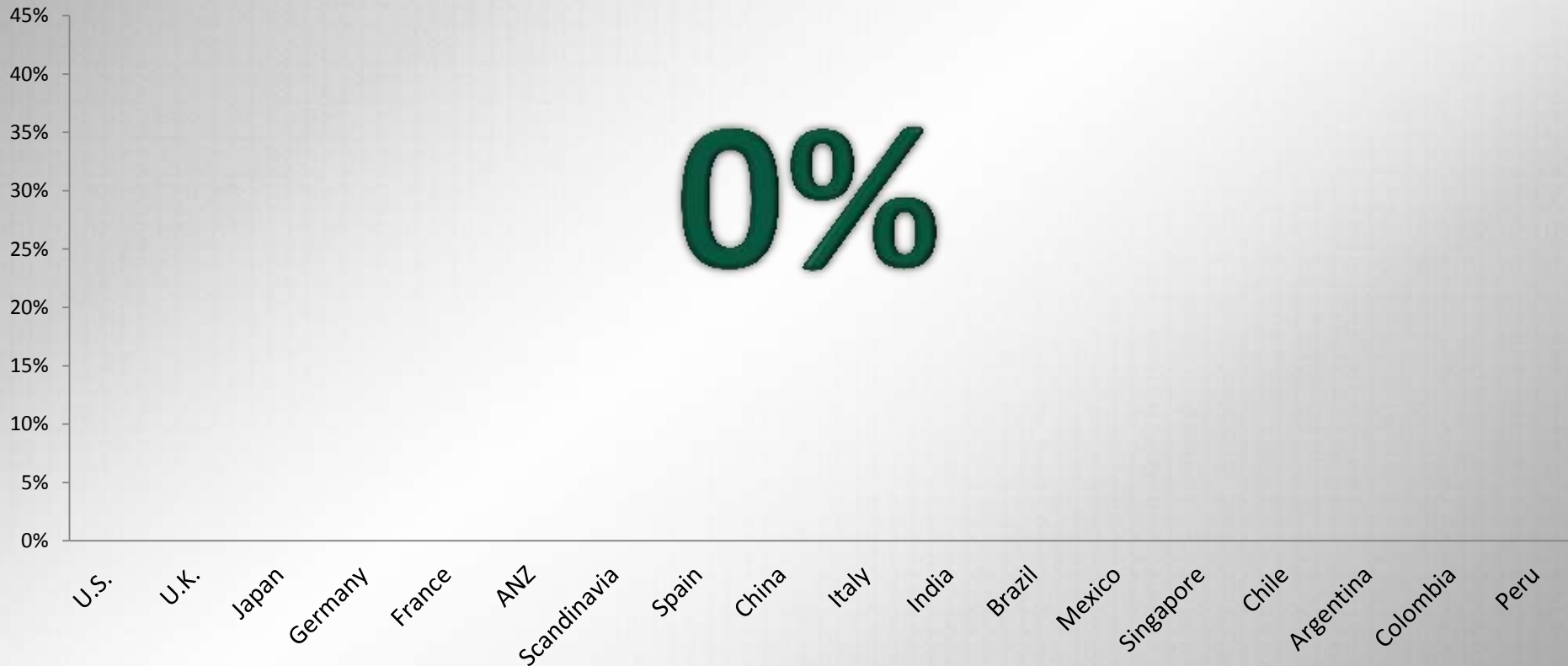
## Agenda

1. Online Travel Takes Over the World
2. Local and Social and Mobile, Oh My!
3. The Million-Dollar Question: “How DO Travelers Decide Where to Go?”



# 1. Online Travel Takes Over the World

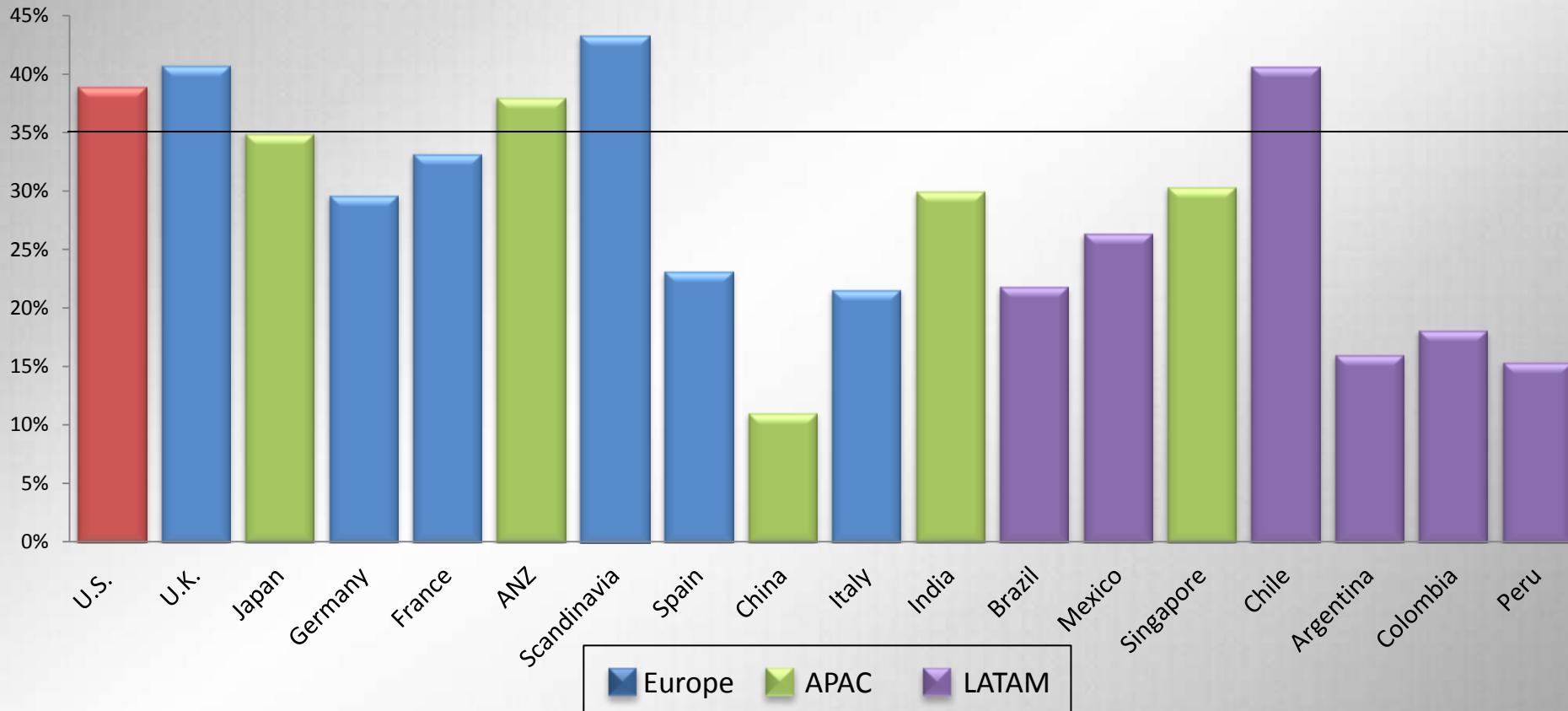
# Online Leisure/Unmanaged Business Travel Penetration by Market, 1992



Note: 2010-2012 projected.

Source: PhoCusWright's Global Online Travel Overview Second Edition, 2011

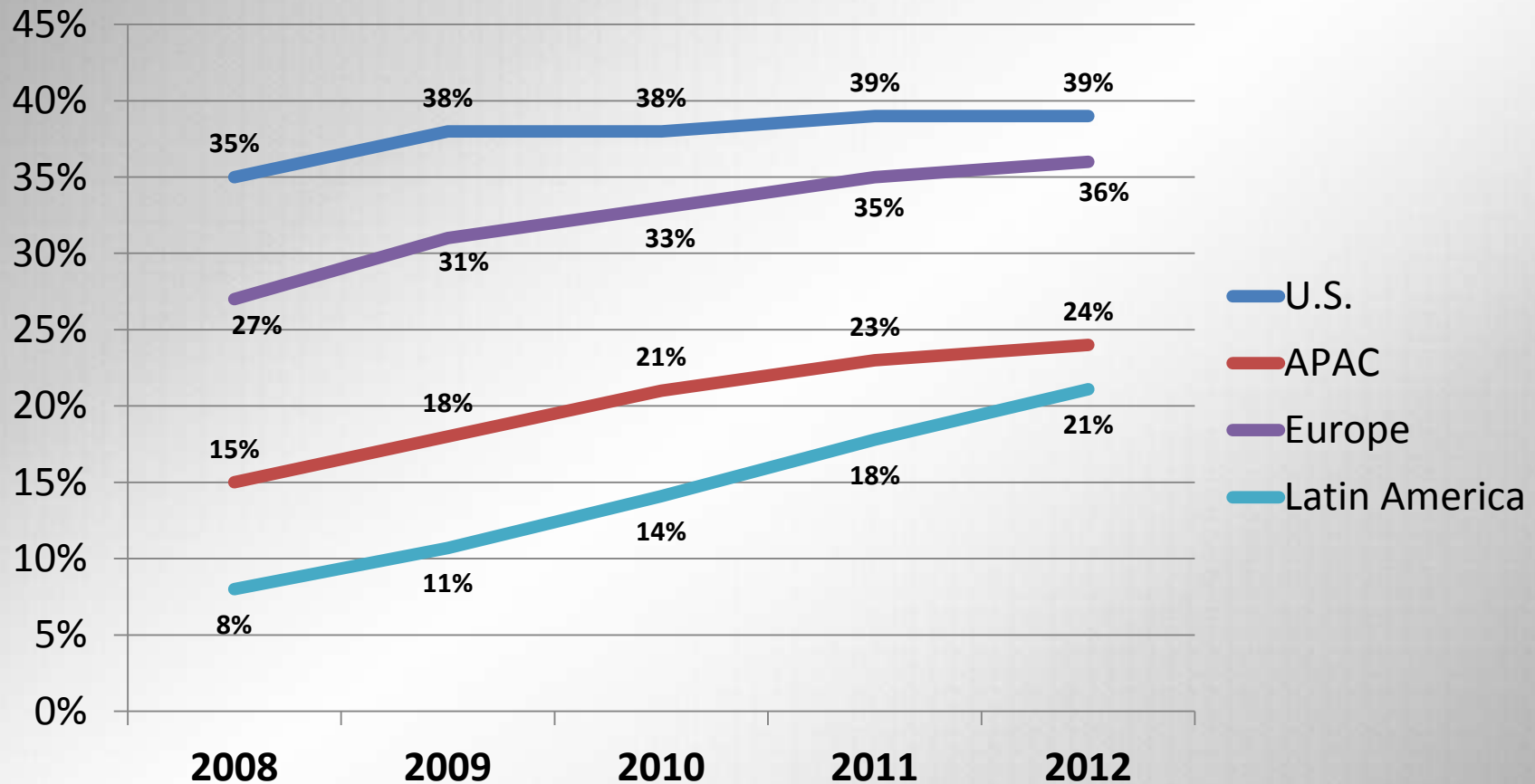
# Online Leisure/Unmanaged Business Travel Penetration by Market, 2012



Note: 2010-2012 projected.

Source: PhoCusWright's Global Online Travel Overview Second Edition, 2011

# Online Travel Penetration\* of the Total Travel Market, Global Markets, 2008-2012



\*Leisure/unmanaged business travel websites as a percent of the total travel market.

Note: 2010-2012 projected. Data for 2012 not available for Canada.

Source: PhoCusWright's U.S. Online Travel Overview Tenth Edition; PhoCusWright's Asia Pacific Online Travel Overview Fourth Edition; PhoCusWright's Latin American Online Travel Overview

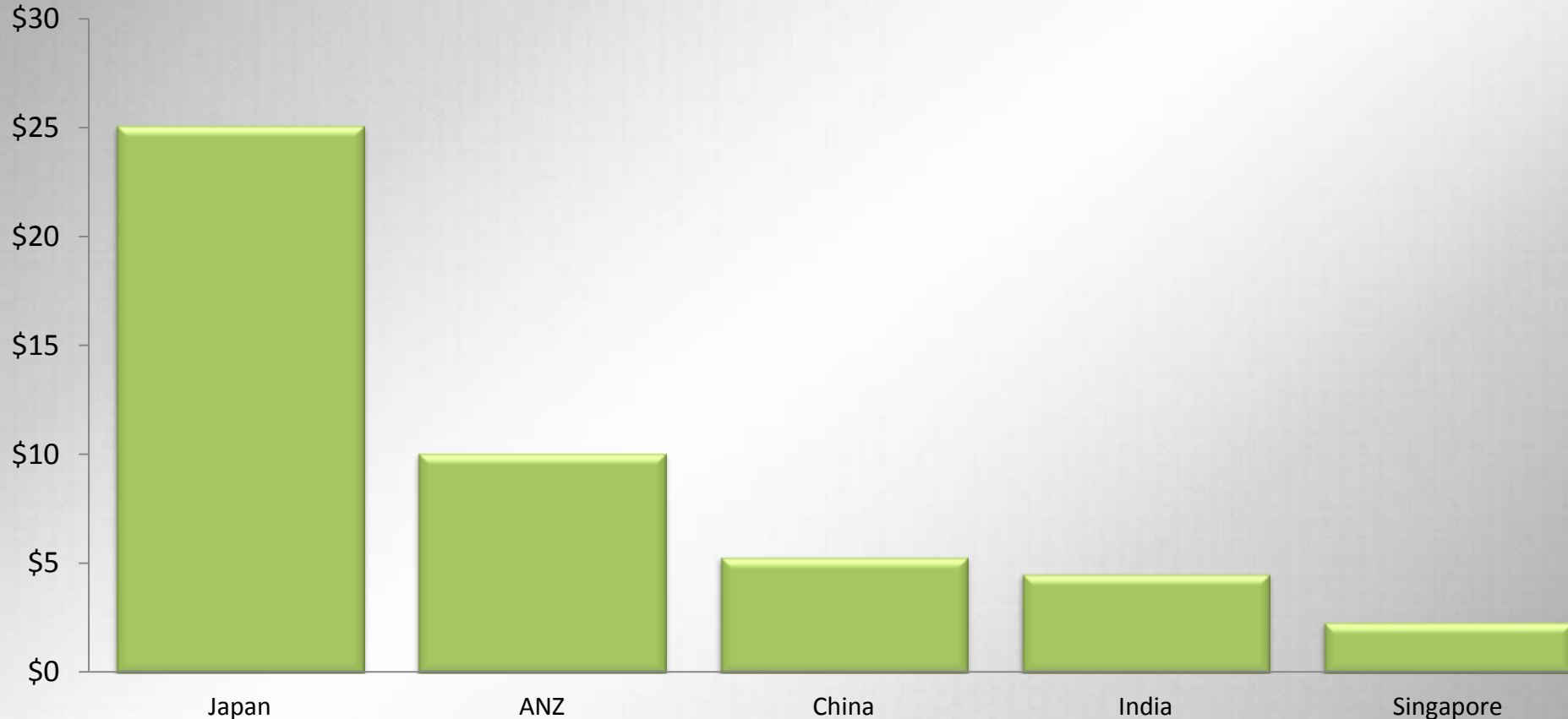
# APAC

- The total travel market is now number two in size, but number one in growth
- But growth varies widely: “surging emerging” vs. mature markets
- At US\$53B in 2010, online travel is no longer nascent
- APAC online travel growing at more than twice the rate of the total travel market
- China: when will the tiny giant awake?
- Mobile acceleration: do you play leapfrog?



## APAC Key Markets

Online Leisure/Unmanaged Business Travel Gross Bookings by Market (US\$B),  
2010 (in order of gross bookings)



Note: 2010 projected.

Source: PhoCusWright's Global Online Travel Overview Second Edition

## APAC Key Markets

Online Leisure/Unmanaged Business Travel Gross Bookings Average Annual Growth Rate by Market, 2010-2012 (in order of 2010 gross bookings)



Note: 2010-2012 projected.

Source: PhoCusWright's Global Online Travel Overview Second Edition



## 2. Local and Social and Mobile, Oh My!

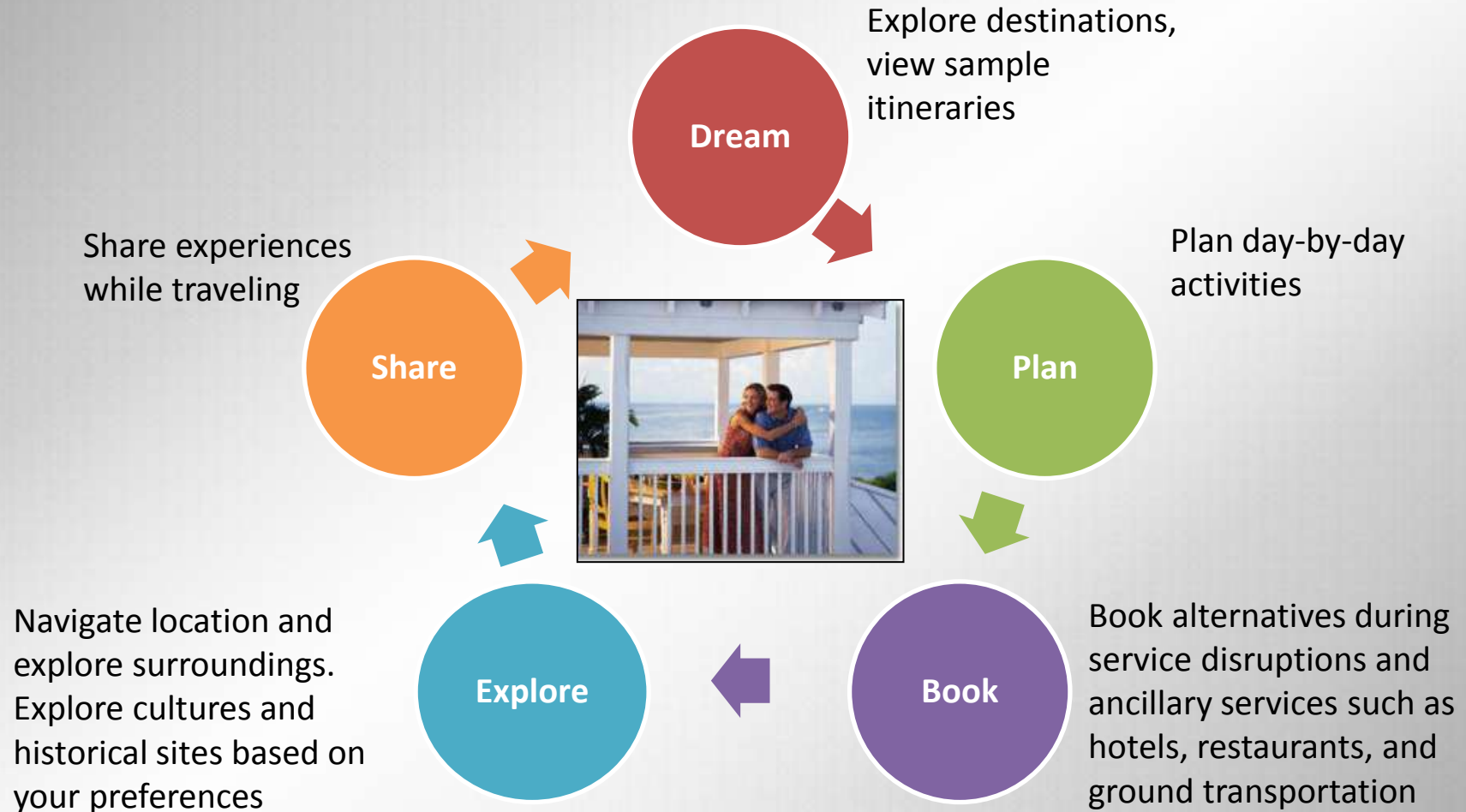


facebook

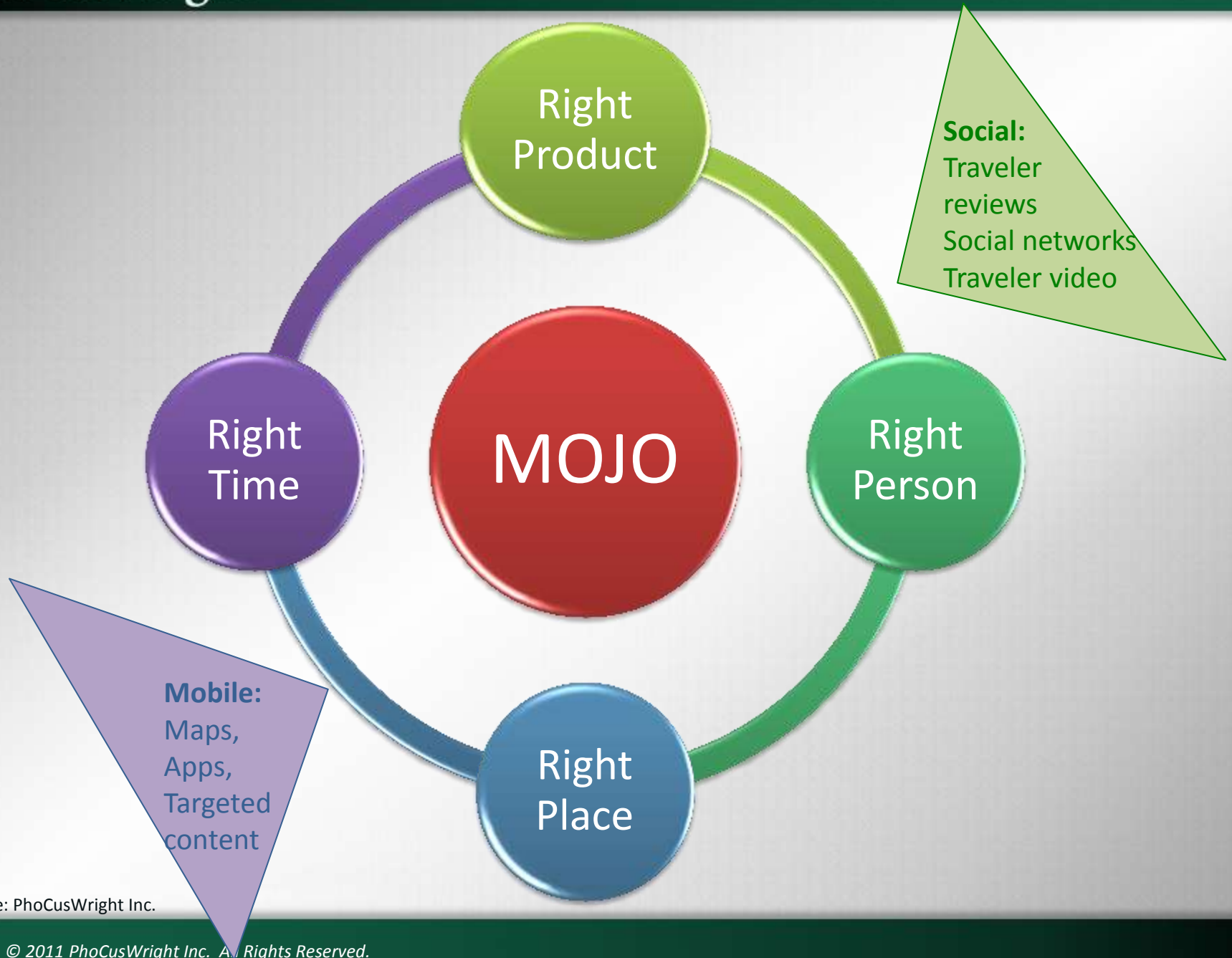
December 2010



# Mobile Travel Applications for Leisure Travel



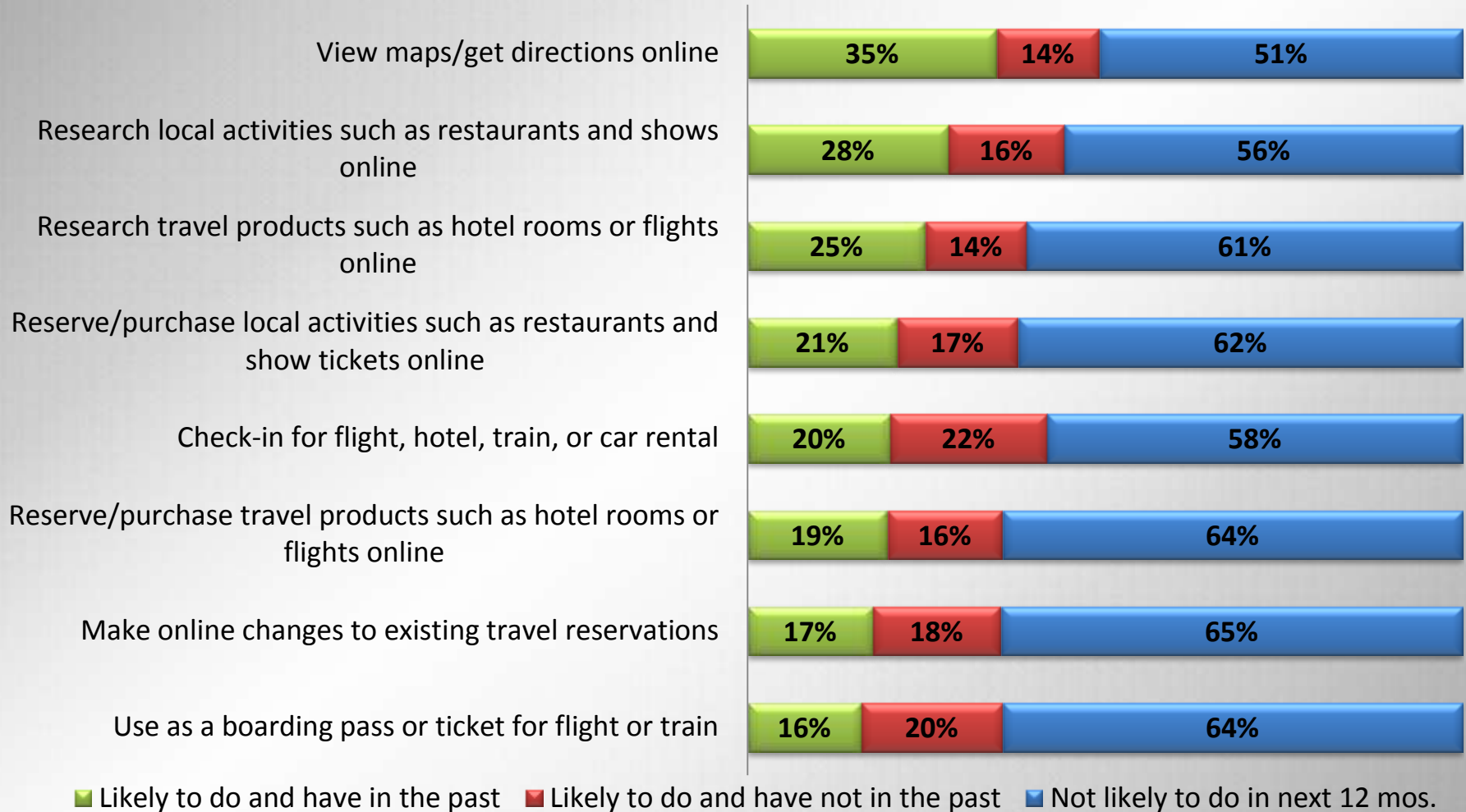
Source: PhoCusWright Inc.



Source: PhoCusWright Inc.

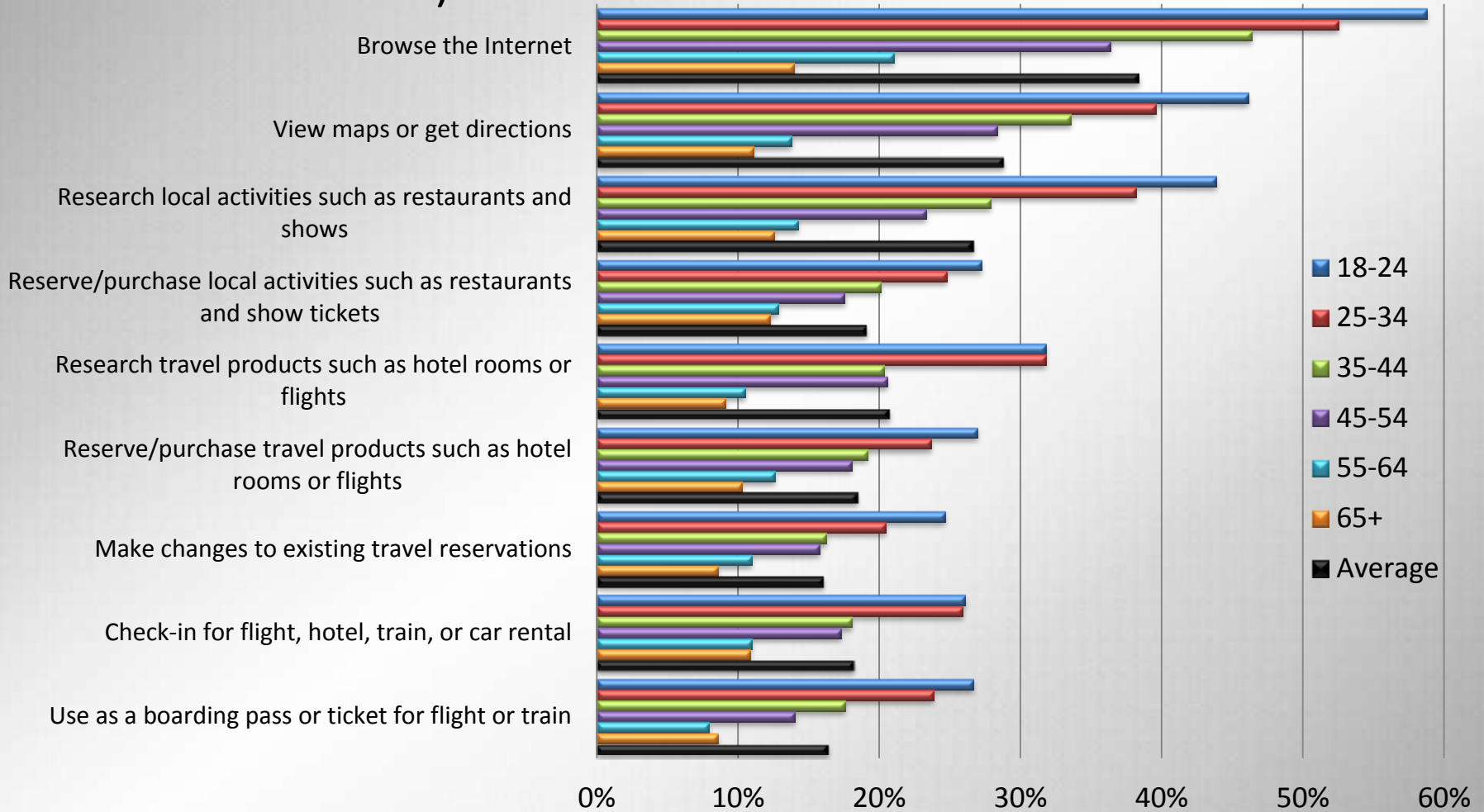


# Travel-Related Mobile Phone Activities (U.S.)



Note: Totals may not add to 100% due to rounding  
 Source: PhoCusWright's Traveler Technology Survey 2010

# Future Mobile Phone Activities, By Age (France, German, U.K. Markets Combined)



Base: Mobile phone users; French travelers (N=744), German travelers (N=730), U.K. travelers (N=714)

Source: PhoCusWright's European Consumer Travel Report



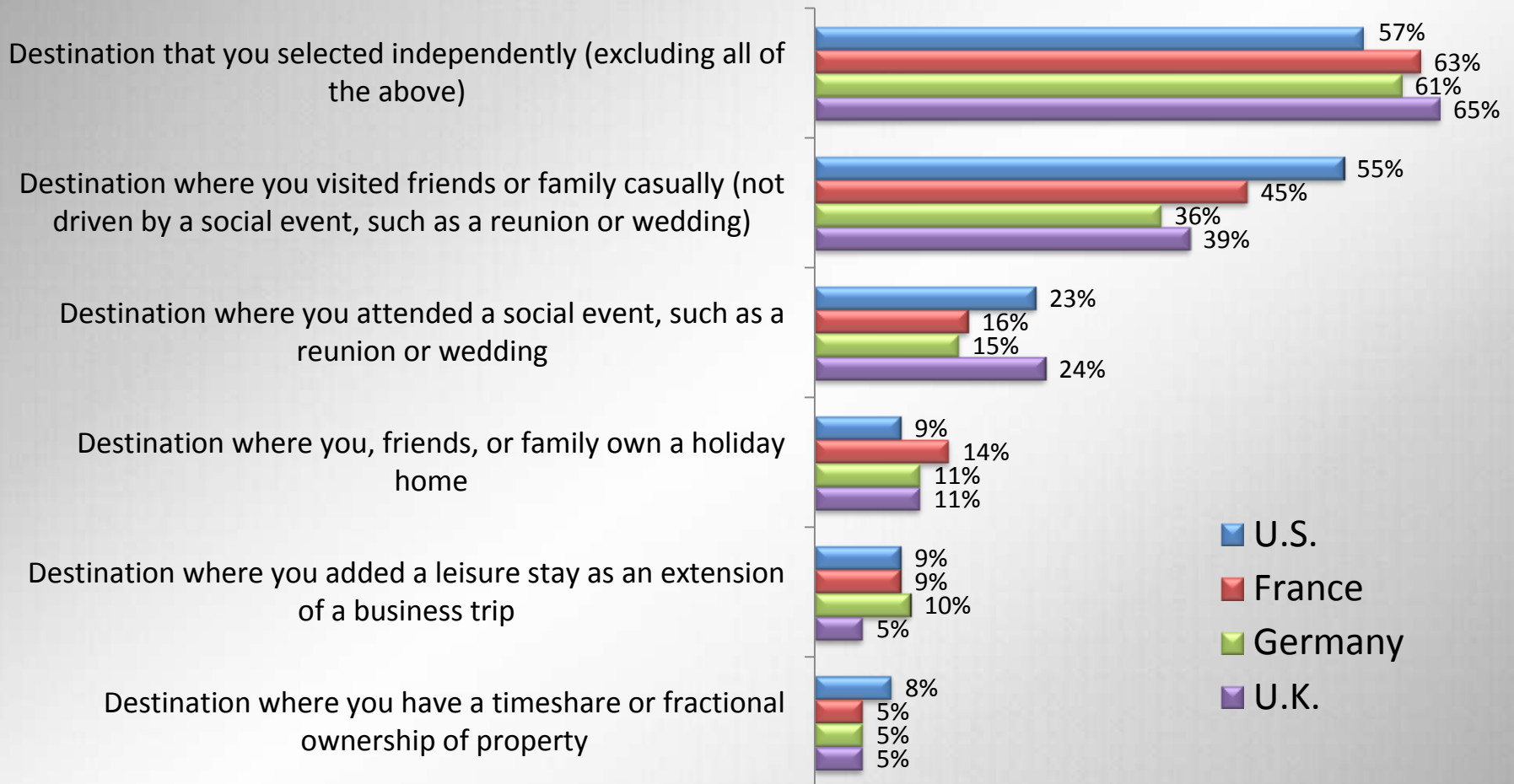
### 3. The Million-Dollar Question: “How DO Travelers Decide Where to Go?”



**Not all Travelers Get to Choose  
Their Own Adventure**

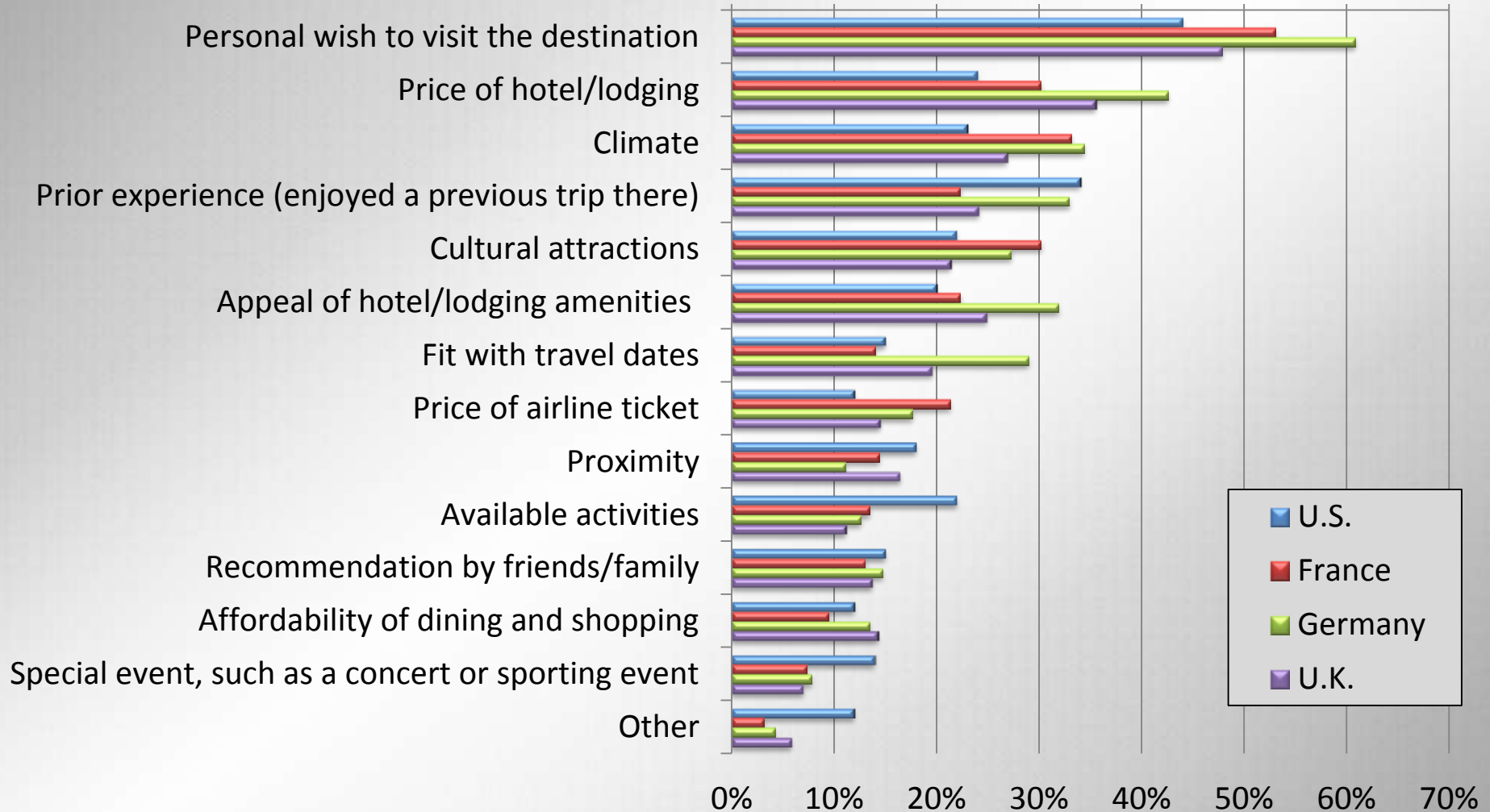


# Leisure Destination Types (Incidence Among Travelers)\*



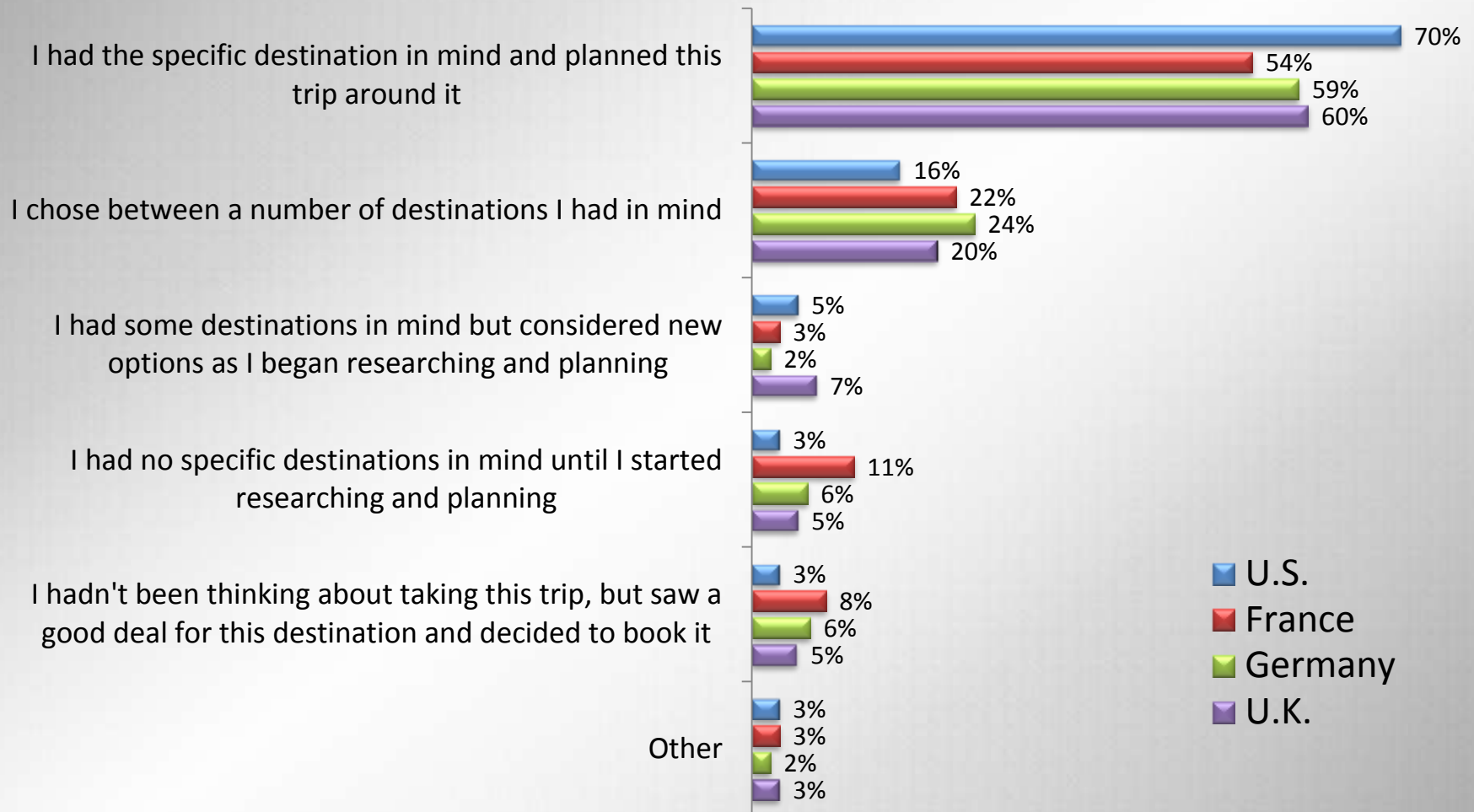
\*Respondents were asked to count each trip once in the most relevant category  
 Base: U.S. travelers (N=2,755), French travelers (N=807), German travelers (N=793), U.K. travelers (N=783)  
 Source: *Destination Unknown: How U.S. and European Travelers Decide Where to Go*

# Influences on Destination Selection

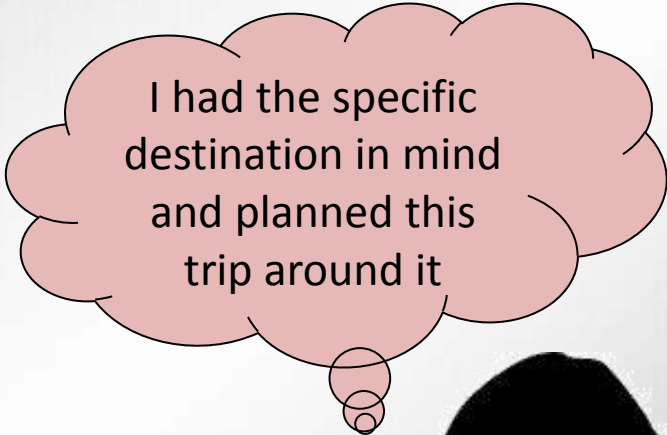


Base: Travelers who have selected a destination independently: U.S. travelers (N=1,569), French travelers (N=507), German travelers (N=477), U.K. travelers (N=510)  
 Source: *Destination Unknown: How U.S. and European Travelers Decide Where to Go*

# Factors Affecting Destination Selection



Base: Travelers who have selected a destination independently: U.S. travelers (1,569), French travelers (N=507), German travelers (N=477), U.K. travelers (N=510)  
 Source: *Destination Unknown: How U.S. and European Travelers Decide Where to Go*



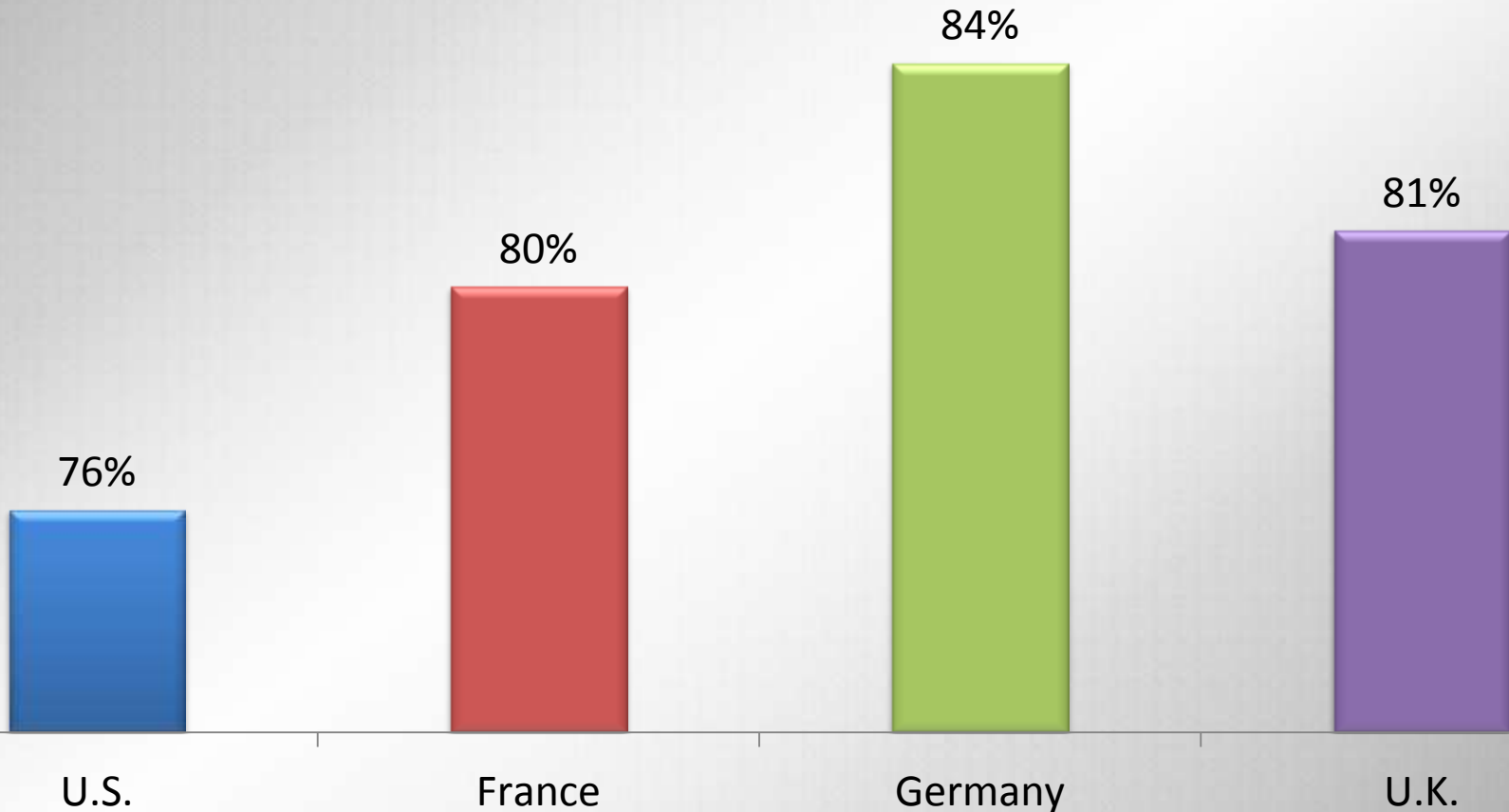
I had the specific  
destination in mind  
and planned this  
trip around it

- ✓ **Leisure Destinations Inspire Travel**
- ✓ **Target the Traveler, Not the Trip**
- ✓ **Opportunity to Influence = Long Term**



**Majority**

## U.S. and European Travelers Typically Use the Internet When Selecting a Destination

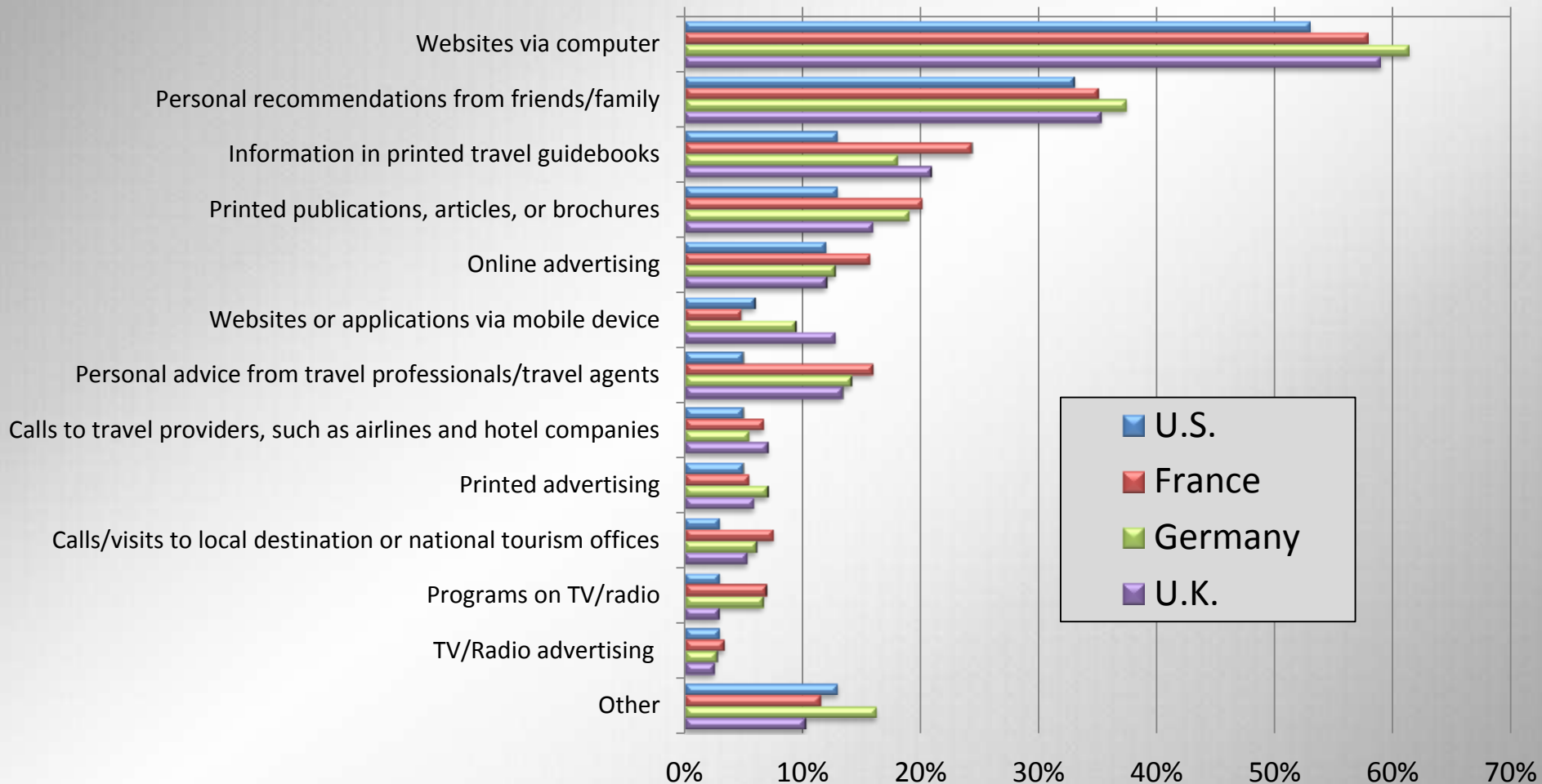


Means exclude zero.

Base: U.S. travelers (N=2,755), French travelers (N=815), German travelers (N=802), U.K. travelers (N=788)

Source: *Destination Unknown: How U.S. and European Travelers Decide Where to Go*

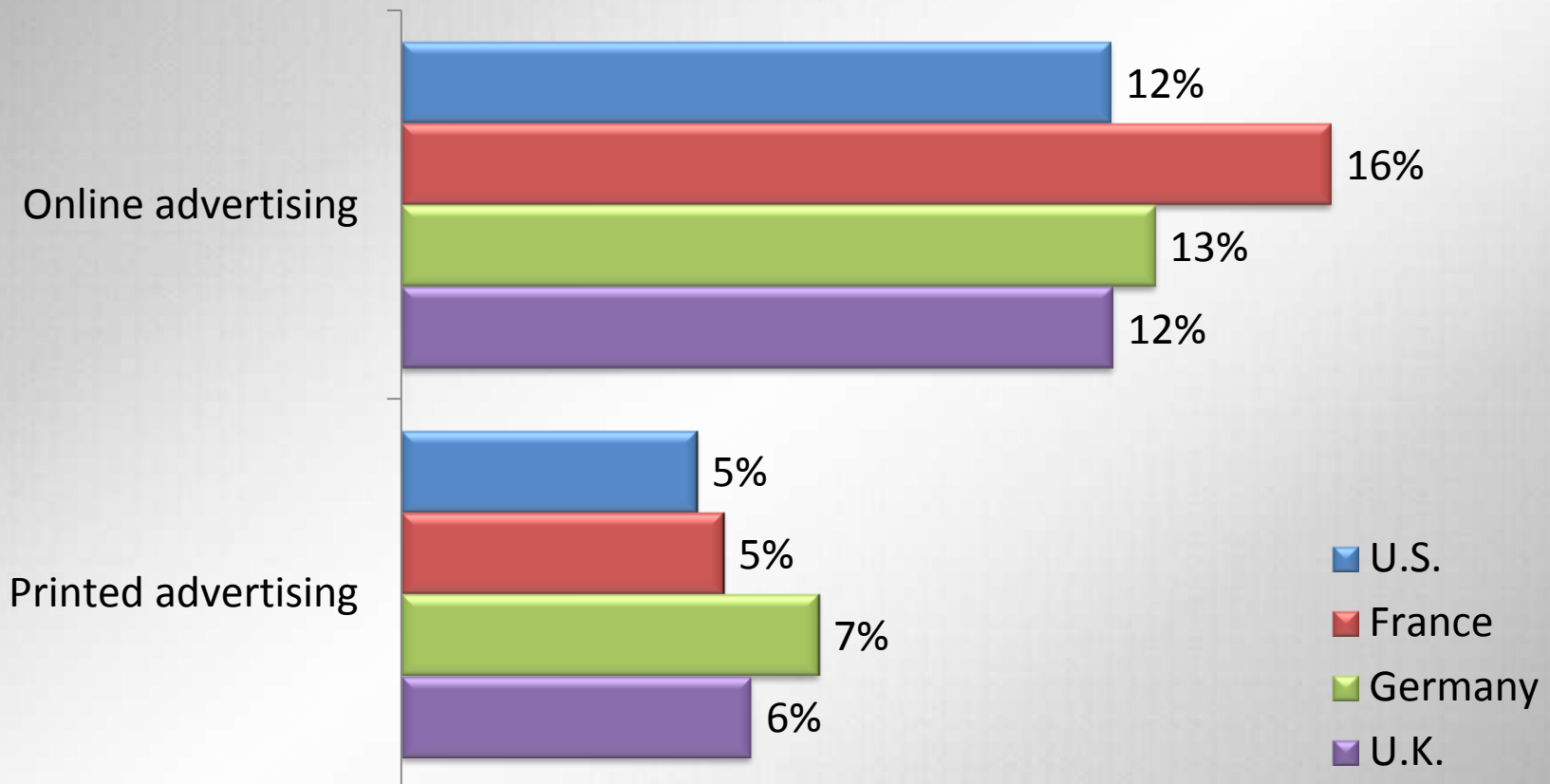
# Information Sources Used for Destination Selection Phase



Base: U.S. travelers= 1,569, French travelers (N=660), German travelers (N=665), U.K. travelers (N=681)

Source: *Destination Unknown: How U.S. and European Travelers Decide Where to Go*

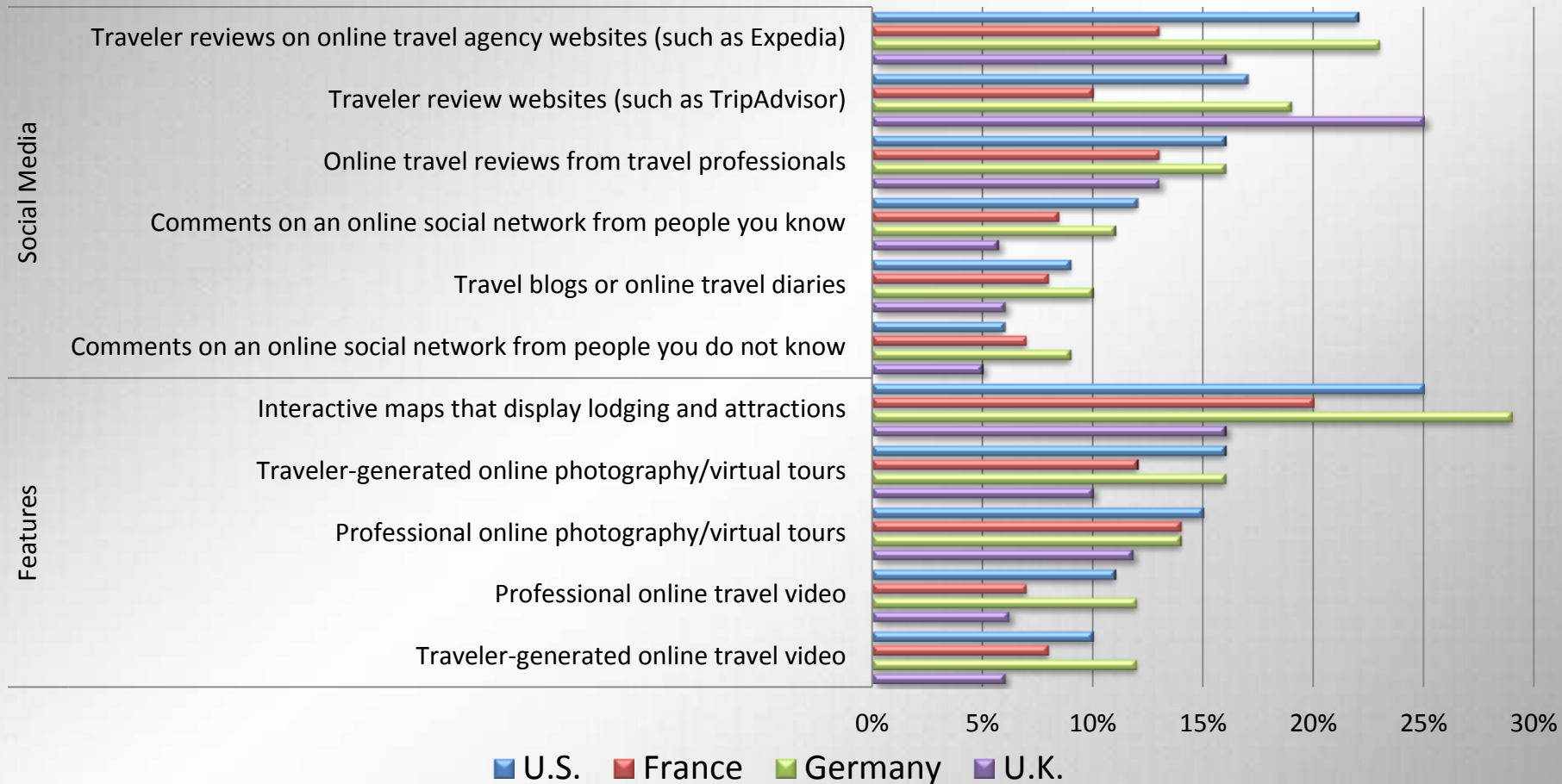
# Information Sources Used for Destination Selection Phase



Base: U.S. travelers= 1,569, French travelers (N=660), German travelers (N=665), U.K. travelers (N=681)

Source: *Destination Unknown: How U.S. and European Travelers Decide Where to Go*

# “Very Influential” Online Features for Leisure Travel Planning



Base: U.S. travelers who typically use websites to plan travel (N=2,558), French travelers (N=815), German travelers (N=802), U.K. travelers (N=788)

Source: *Destination Unknown: How U.S. and European Travelers Decide Where to Go*

# Maximize Influence



- 1. Connect: Global Travelers Shift Online**
- 2. Innovate: Social, Local, Mobile**
- 3. Inspire: Target the Traveler, Not the Trip**



Thank You!

# PhoCusWright Syndicated Research

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- U.S. Online Travel Overview
- European Online Travel Overview
- India Online Travel Overview
- China Online Travel Overview
- Australia/New Zealand Online Travel Overview
- Latin America Online Travel Overview
  
- DMO Study
- Mobile Travel Studies
- PhoCusWright's 2011 Technology Trend Predictions
- U.S. Travel Agency/Tour Operator Study
- Social Media Analytics
- Activities, Attractions and Events Study
- Destination Unknown: How U.S. and European Travelers Decide Where to Go



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