

Net Value

Marketing Travel On The Internet



From Travel Business Analyst

Go no FURther

FUR* often changes its tracking of on-line activities of leisure travellers in Germany.

Previously, it measured what share booked on the internet - and its annual studies showed that the number had increased five-fold over 2001-8, see table. This was not shown in 2009, but for 2010 the figure was put at 14% - well below the 23% it showed for 2008, and thus not quite believable.

In addition, FUR currently gives the 2005 share as 7%, well below the 14/15% it has shown earlier.

We presume that FUR has adjusted some criteria but not told anyone. Elsewhere, we have criticised other aspects of the FUR study, worrying that it may track certain activity with a purely academic interest rather than with a marketing bent. This way of working now seems to have extended to its research on internet activity.

For 2009 FUR began tracking what is an imprecise 'very often' and 'from time-to-time' categories for which sites respondents visited, and five of the seven categories were essentially the same. *Given the element of error, FUR's new findings are meaningless in a practical sense.*

Another measure was more categorical in its findings - showing the greatest share (37%) visiting 'reference websites and wikis' for information.

But we question the ability of those surveyed to categorise sites. Other categories were 'travel review platforms', 'blogs', 'social networks'. We would find it difficult to differentiate

between a reference site, a travel review site, and blog site - particularly when there are click-throughs for many activities, and many travel sites try to be

Internet usage in Germany for leisure travel, % share

Jan	Booking
2008	23
2005	14*
2003	9
2001	4

Notes: See text. *Adjusted; contemporary FUR data showed 15%. Source: FUR.

everything to everyone.

For 2010 there was another change. This provides interesting information, but devalued slightly as there is no comparison. This includes:

- Websites visited. An average of 13 - 22% visited 20-50 sites, 47% visited 7-19, and 31% visited 1-6.
- Time spent. An average of 9 hours - 22% for 12-25 hours, 45% 5-12 hours, 33% 1-4 hours.

*Forschungsgemeinschaft Urlaub und Reisen.

Reports from PhoCusWright

• Excerpts from a presentation by Carroll Rheem, research director, PCW:

• From France (F) the 18mn outbound travellers represent 35% of the adult population, and 51% of online adults. From Germany (G), 29mn 43% 59%. From the UK, 24mn 50% 65%.

• 'Very influential online feature for travel planning'. Online reviews on sites such as Expedia (F13% G23% UK16%). Online reviews from travel professionals (F13% G16% UK13%). Traveller review sites such as Trip Advisor (F10% G19% UK25%). Comments on social network from people you know (F8% G11% UK6%). Travel blogs (F8% G10% UK6%).

• 'Current and planned mobile phone activity'. Research travel products, last 12 months/next 12 months (F8/24% G9/17% UK12/22%). Reserve/buy travel products (F8/22% G7/16% UK10/18%). Check-in for flight, train, hotel, rental car (F6/20% G8/16% UK9/18%).

• PCW says The Asia Pacific online travel market, at a 20% share in 2010, will grow at double-digit rates this year and in 2012.

• A PCW report on Australia notes that traffic to travel websites increased 30% in 2010, compared to just 3% for

all internet traffic.

Some data reflects estimates by Travel Business Analyst from PCW data.

Thinking passengers

A survey of airline passengers by Mindset found:

• 29% go online for travel information 'sometimes', 20% 'most of the time', 21% rarely, 31% never. For those aged under 35 years, the shares were 26% 28% 26% 20%. For those over 55 years, 14% 26% 21% 39%. Of those who Mindset characterised as Adventurers, the shares were 24% 33% 20% 23%.

• Top-5 in social media used - 47% Trip Advisor, 41% Facebook, 10% Linked In, 3% Twitter, 3% Google.

• Those using social media for travel bookings - 56% never, 22% rarely, 16% sometimes, 6% mostly.

• Those using social media to search information during a trip - 38% never, 25% rarely, 27% sometimes, 10% mostly.

• Those using travel recommendations - 23% never, 25% rarely, 45% sometimes, 7% mostly.

• Do travel recommendations influence your booking or travel behaviour - 8% never, 24% rarely, 59% sometimes, 8% mostly.

• Using mobile device for travel search before booking - 29% never, 24% rarely, 22% sometimes, 7% mostly.

• Using mobile device for travel booking - 53% never, 28% rarely, 16% sometimes, 2% mostly.

• Using mobile device for check-in, boarding - 40% never, 21% rarely, 29% sometimes, 2% mostly.

Bites

• From Washington Aviation Summary:

• In a Skyscanner poll, 52% of respondents said that seeing friends' photos on Facebook had inspired them to book a vacation to the same place, 45% said Facebook encourages them to visit their friends, and 46% have either organised or been invited on a trip via Facebook.

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