Travel Retail Behaviorial Research Study

Market research survey

2020 - 2021

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PROS.

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PROS.

Introduction

The survey allowed us to better understand the behaviors of how prospective consumers search and book their flights online.

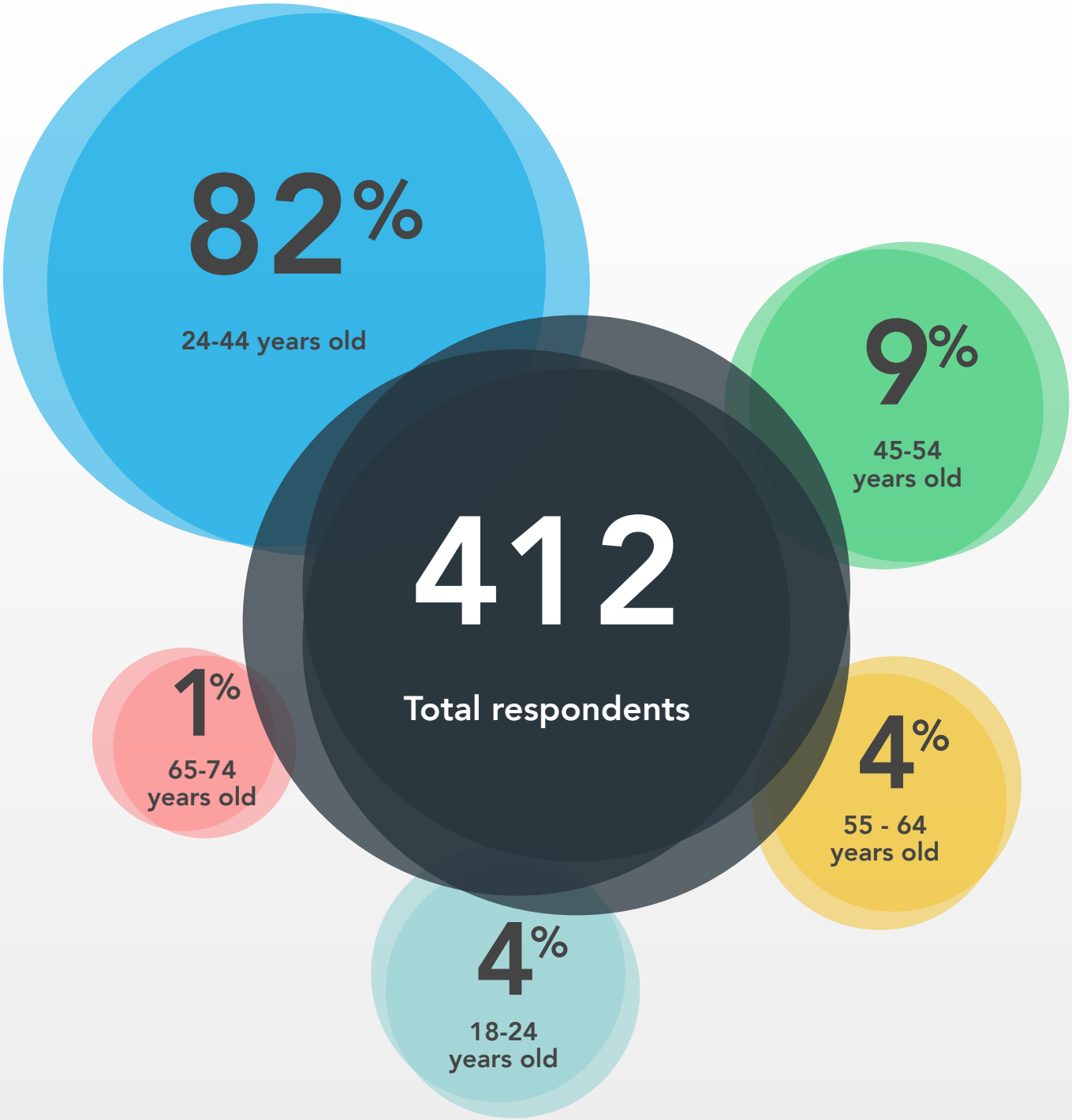
The insights we received provided us with clarity on how we can develop our core product to better fit the needs of both or customers and their users. We took these insights to build four personas to guide the development of our core product.

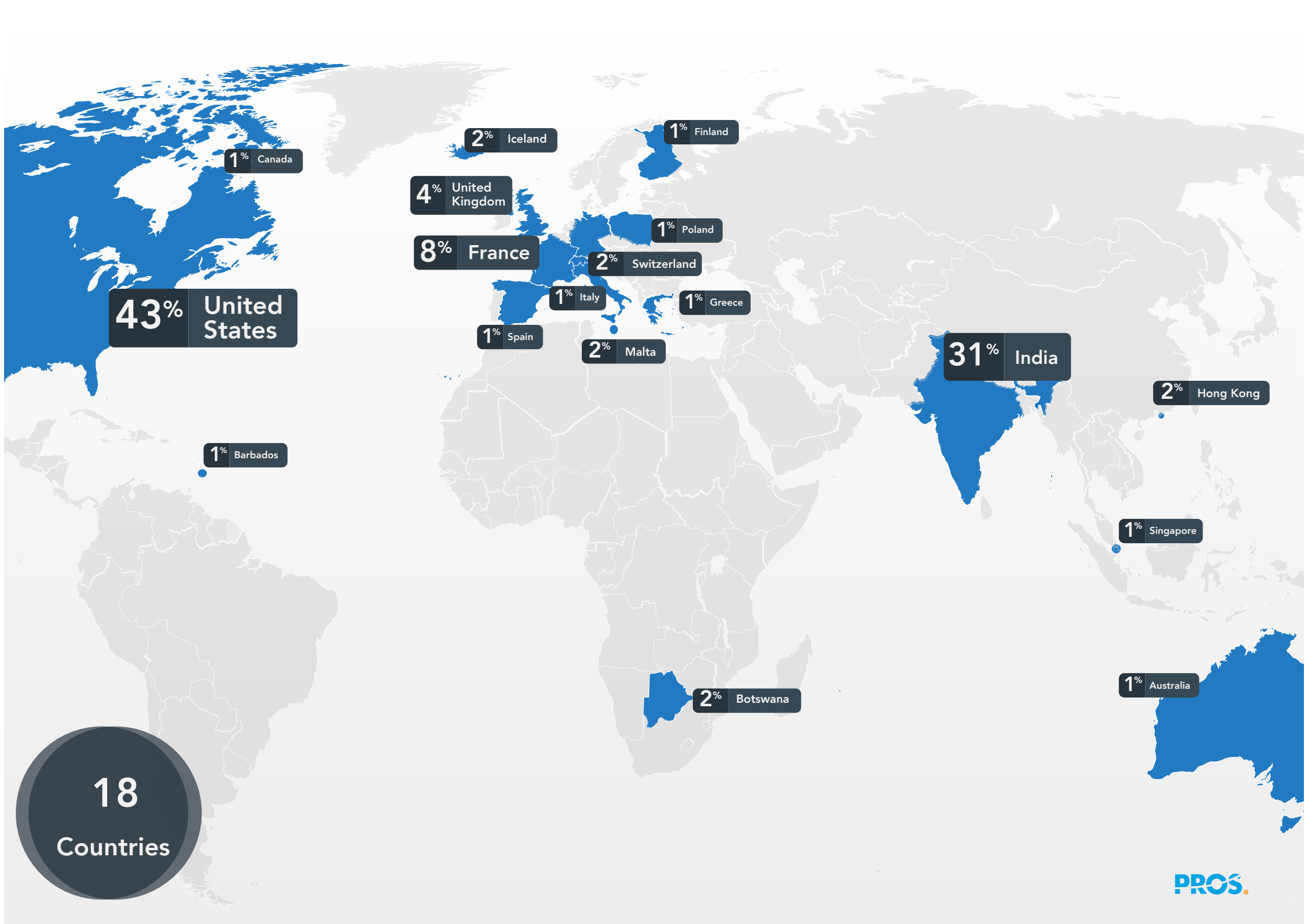
Demographics

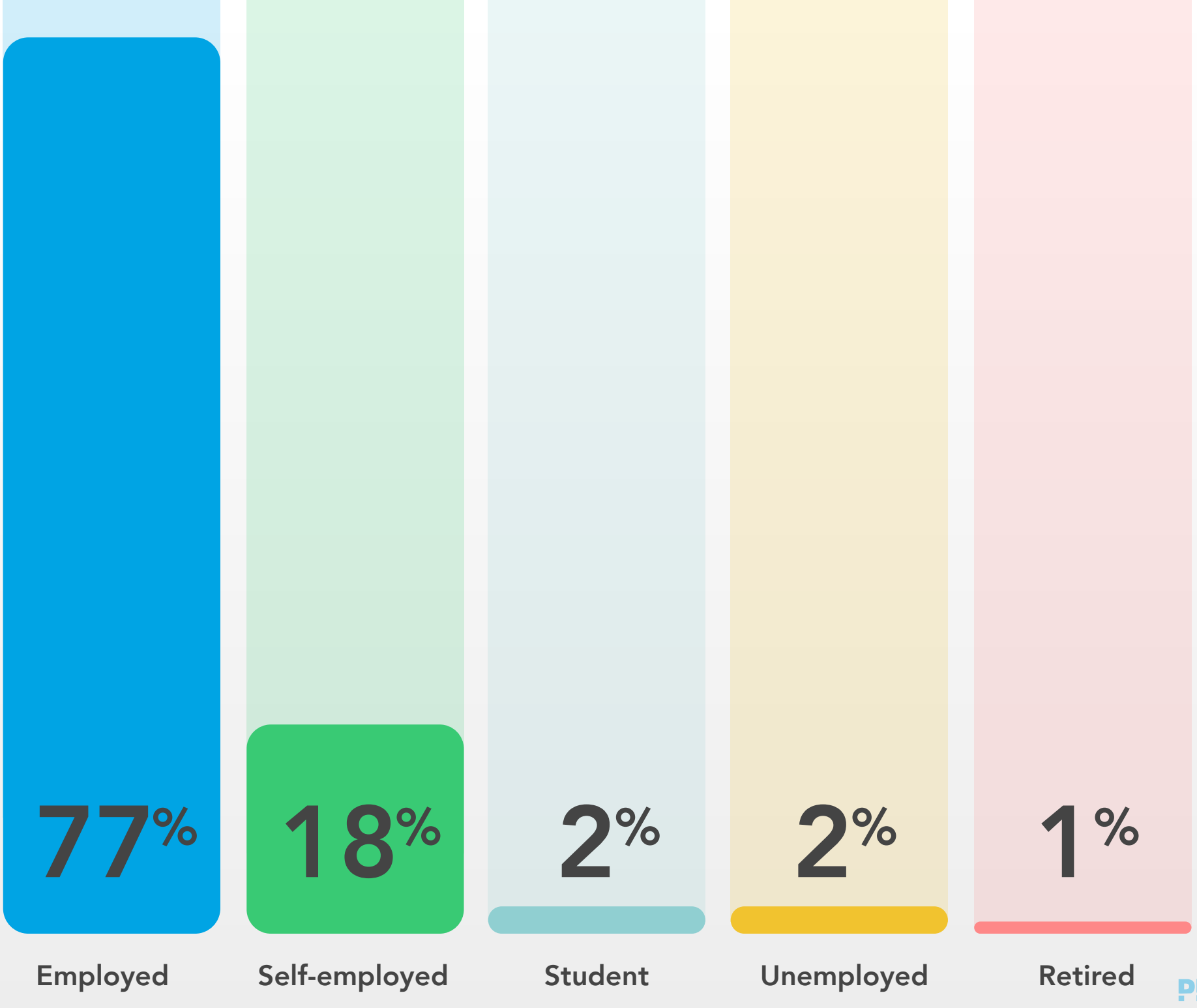
Our survey received responses from **412 respondents located in 18 countries**. Their geographical diversity allowed us to better understand global behavioural patterns existent when searching and buying flights online before the onslaught of covid-19.

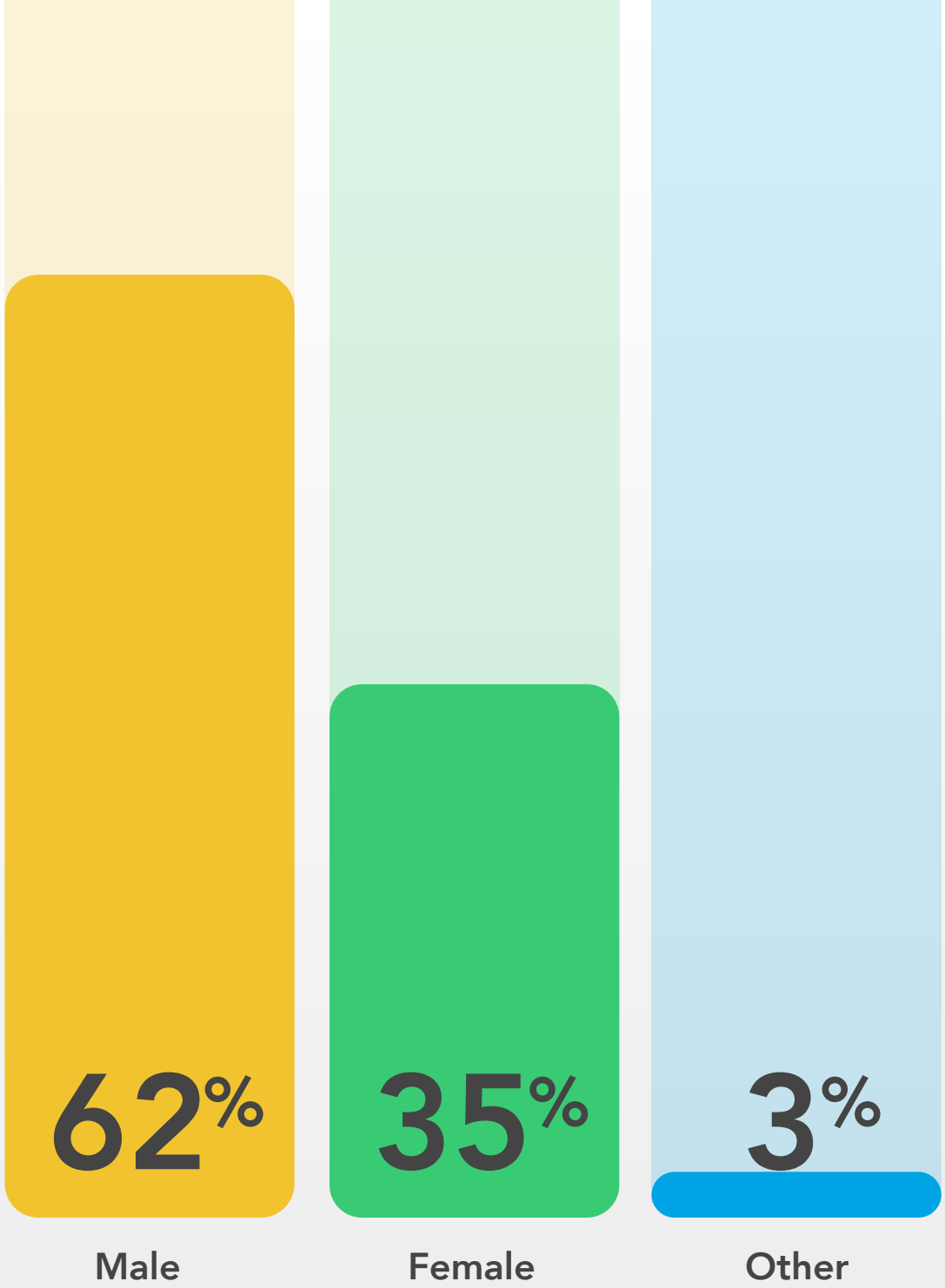
We observed that searching and buying flights online differed from country to country based on different factors such as the accessibility of traveling, holiday availability and the duration of trips.

PROS.


82%
24-44 years old
9%
45-54
years old
412
Total respondents
1%
65-74
years old
4%
55 - 64
years old
4%
18-24
years old

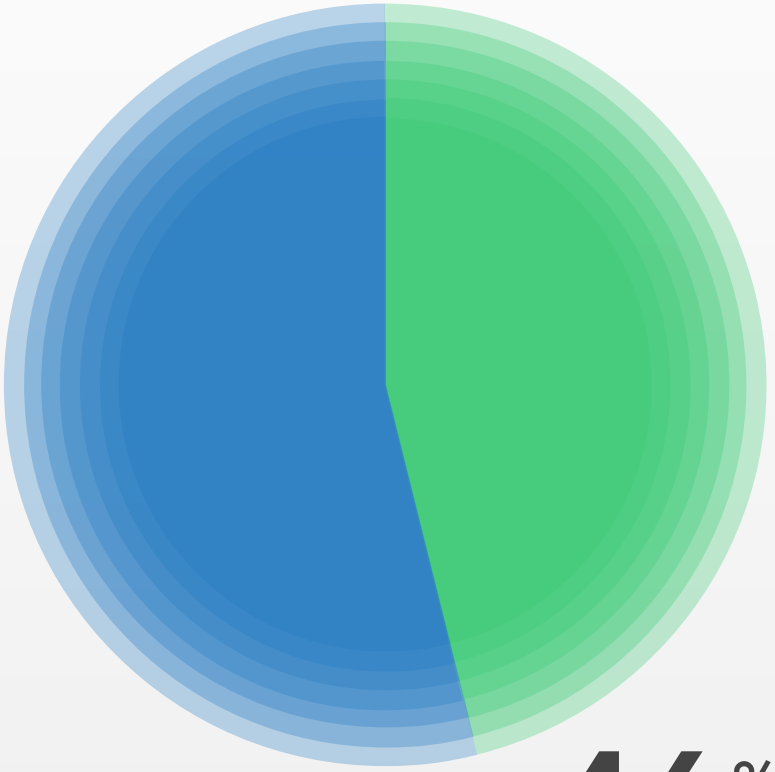

1% Canada
43% United States
2% Iceland
1% Finland
4% United Kingdom
8% France
1% Poland
2% Switzerland
1% Italy
1% Greece
1% Spain
2% Malta
31% India
2% Hong Kong
1% Barbados
1% Singapore
2% Botswana
1% Australia
18
Countries
PROS.


77%
18%
2%
2%
1%
Employed
Self-employed
Student
Unemployed
Retired



54%

Have children



46%

Do not have children

PROS

"I really like to travel but since I have kids travelling became more stressful.
I can't wait till they are older and they will get excited about travelling as much as I do."

Travel Behavior

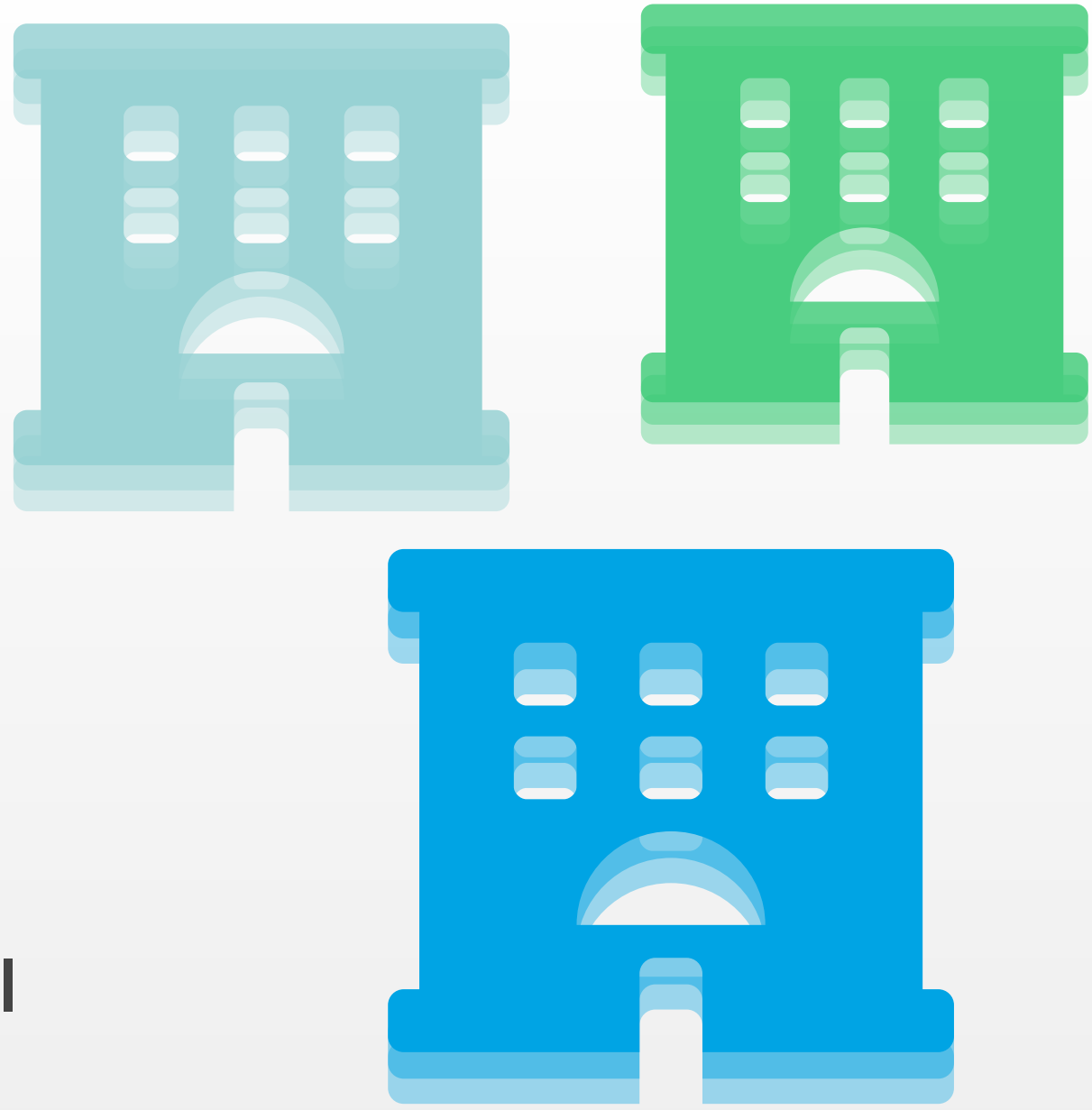
This element of our study brought us surprises from what we had imagined and the behaviors our participants revealed through the responses.

We observed differing behaviors based on the respondent's geographical location. We noticed that American and Indian participants preferred searching and purchasing their flights using their computers while European participants preferred using their mobile phones.

75%

Prefer to search for flights using their computer

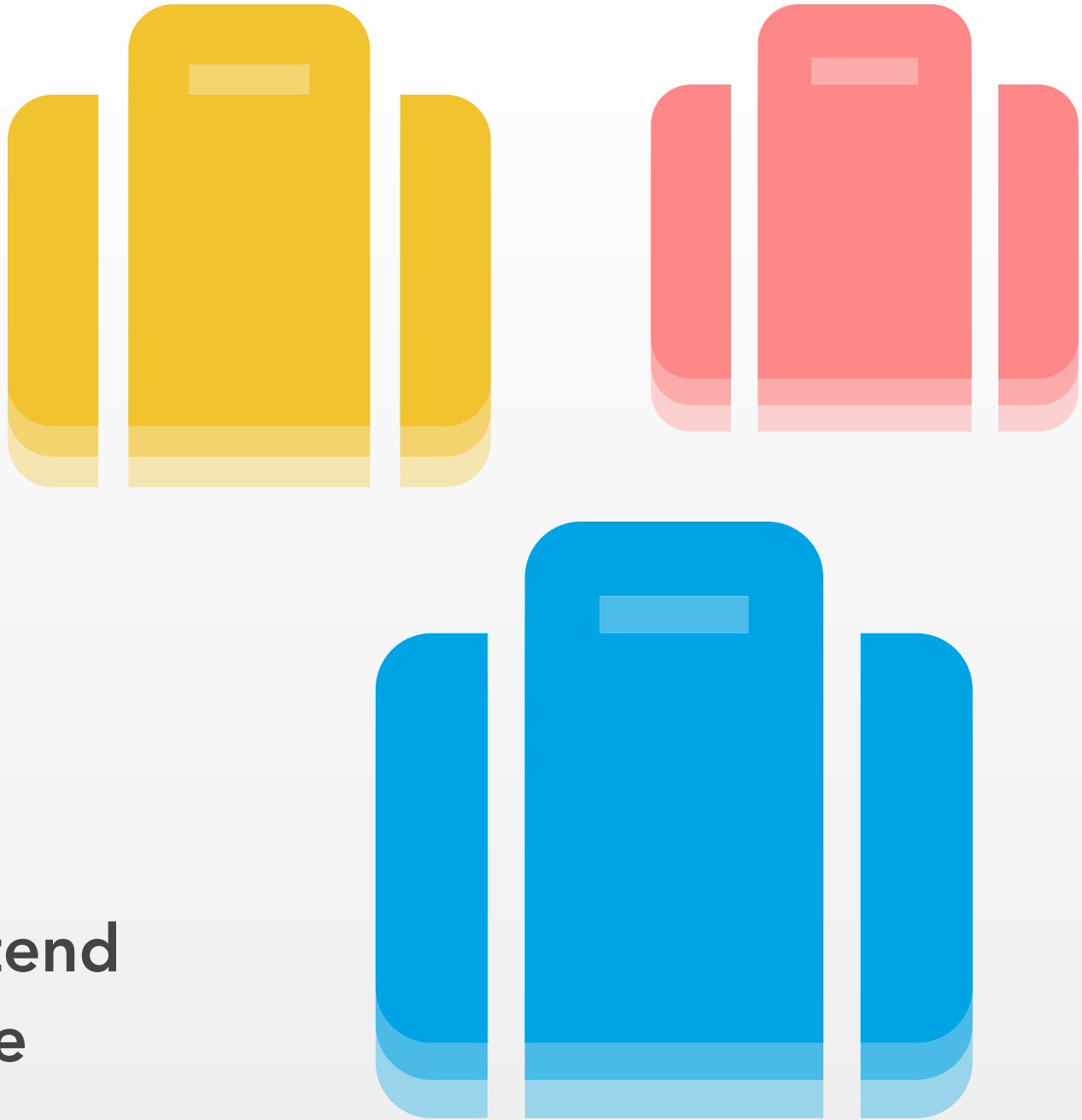
PROS



60%

Prefer to stay in a hotel when traveling

PROS



56%

Business travelers extend their trips for pleasure

PROS

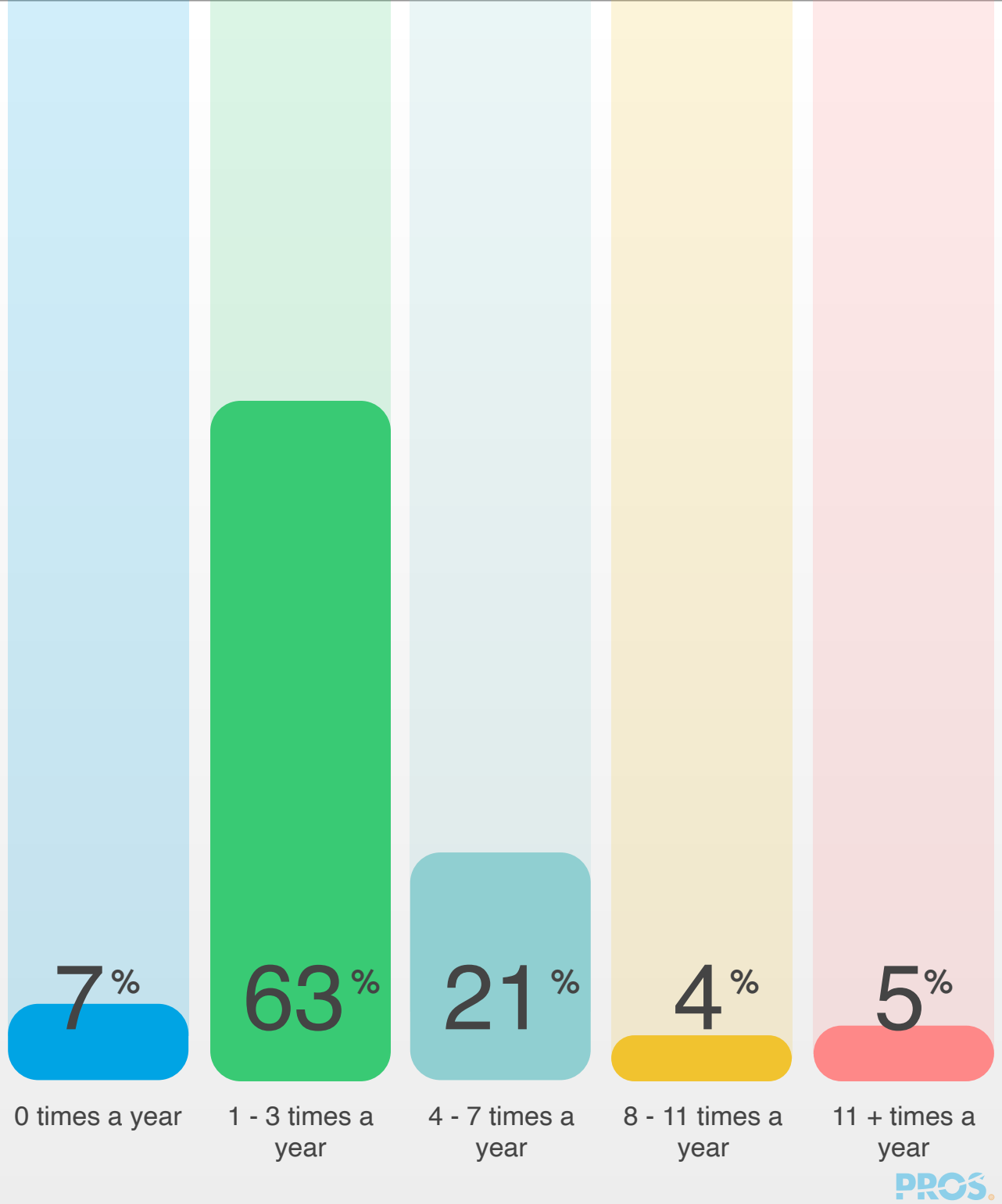
46%

respondents prefer to search & take a few days before making a purchase

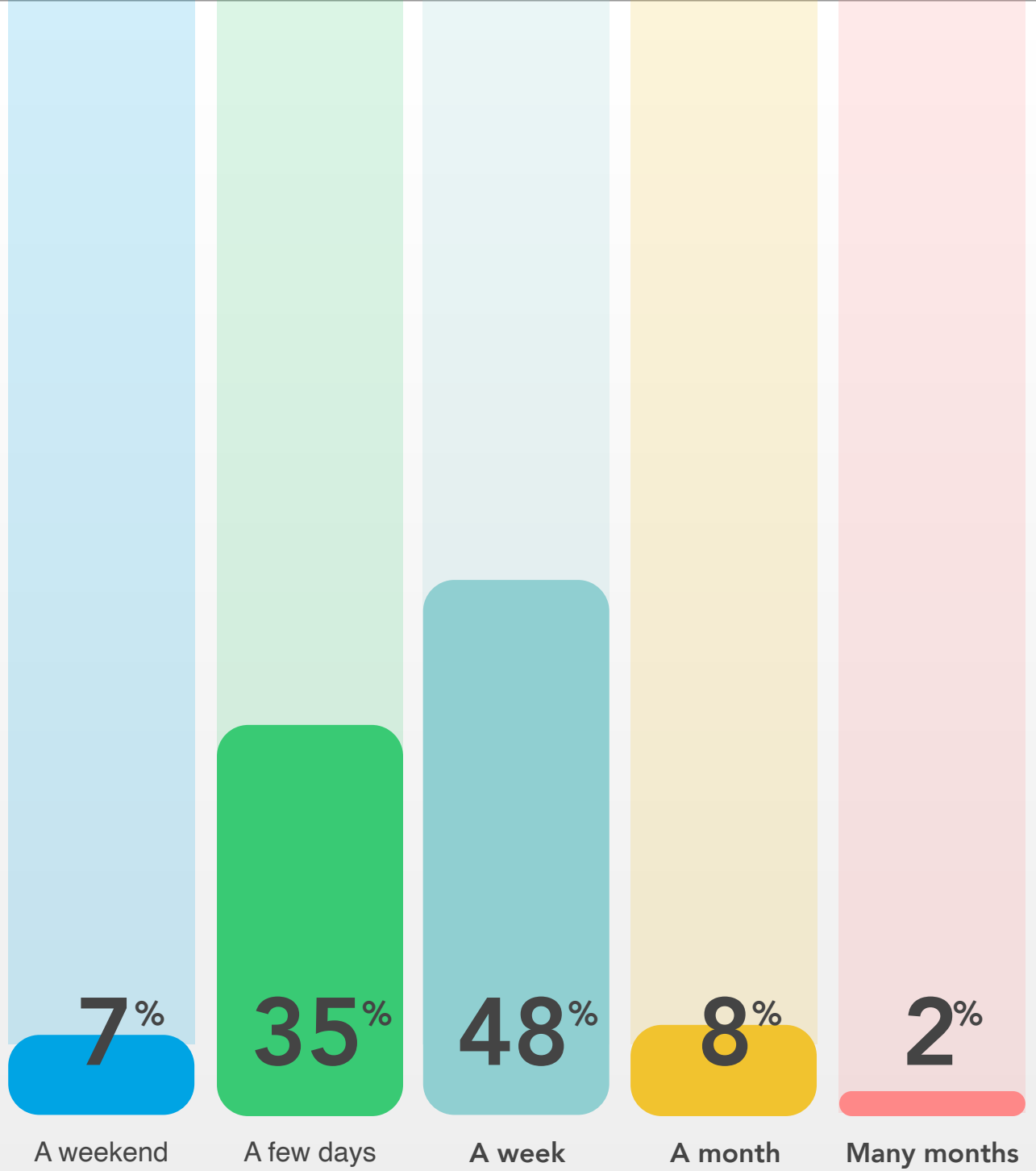
PROS

"I always found discounted tickets when I book ticket 3 to 4 months before my travel"

How many times a year do you travel by plane for pleasure?

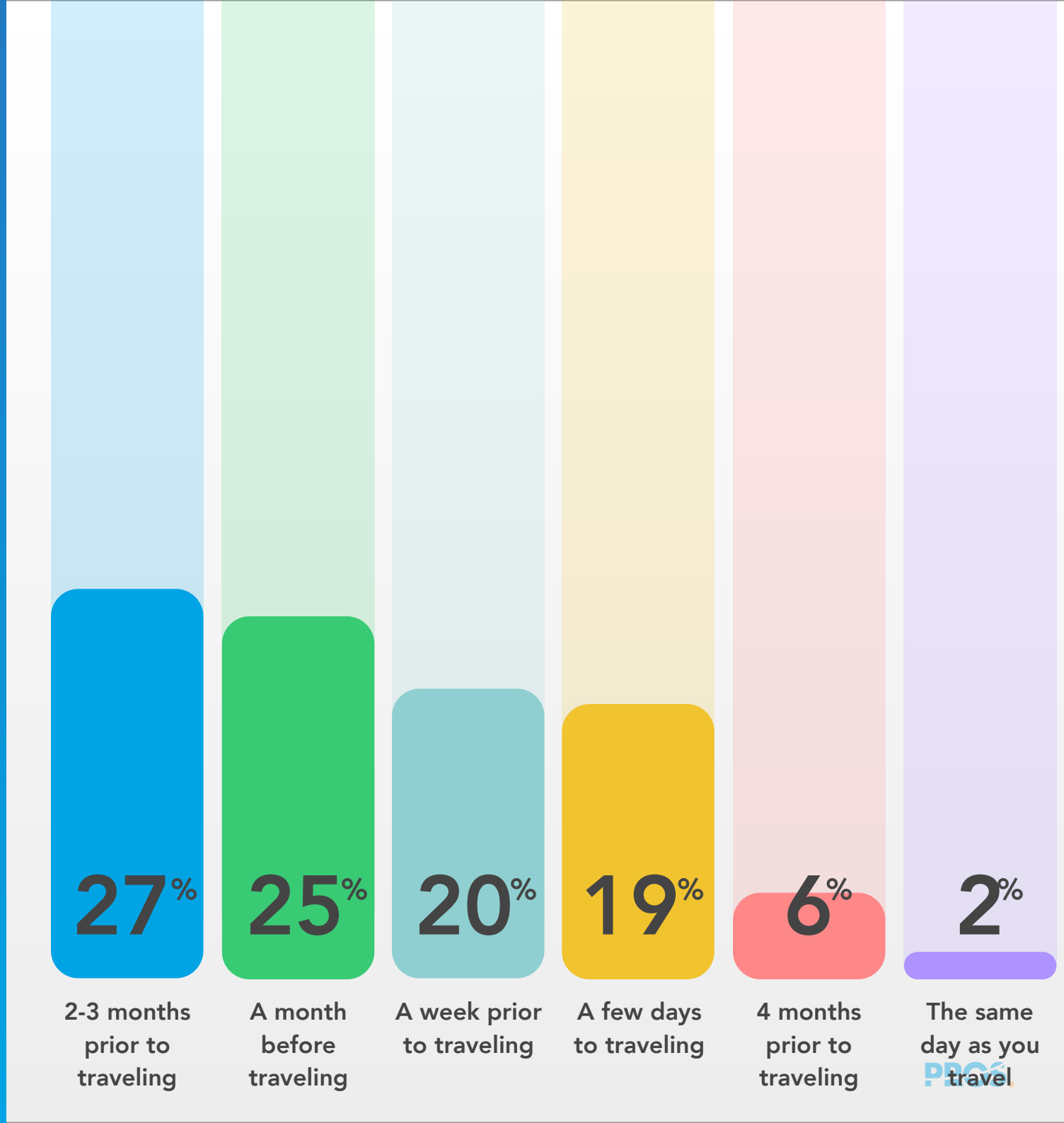


What is the average duration of your trips?



PROS

Preferences for purchasing flights in regards of time



"I'm just looking for the best rates based on my travel dates."

Device Preference

There is much talk these days on creating mobile-first for the digital experience of searching and booking flights online.

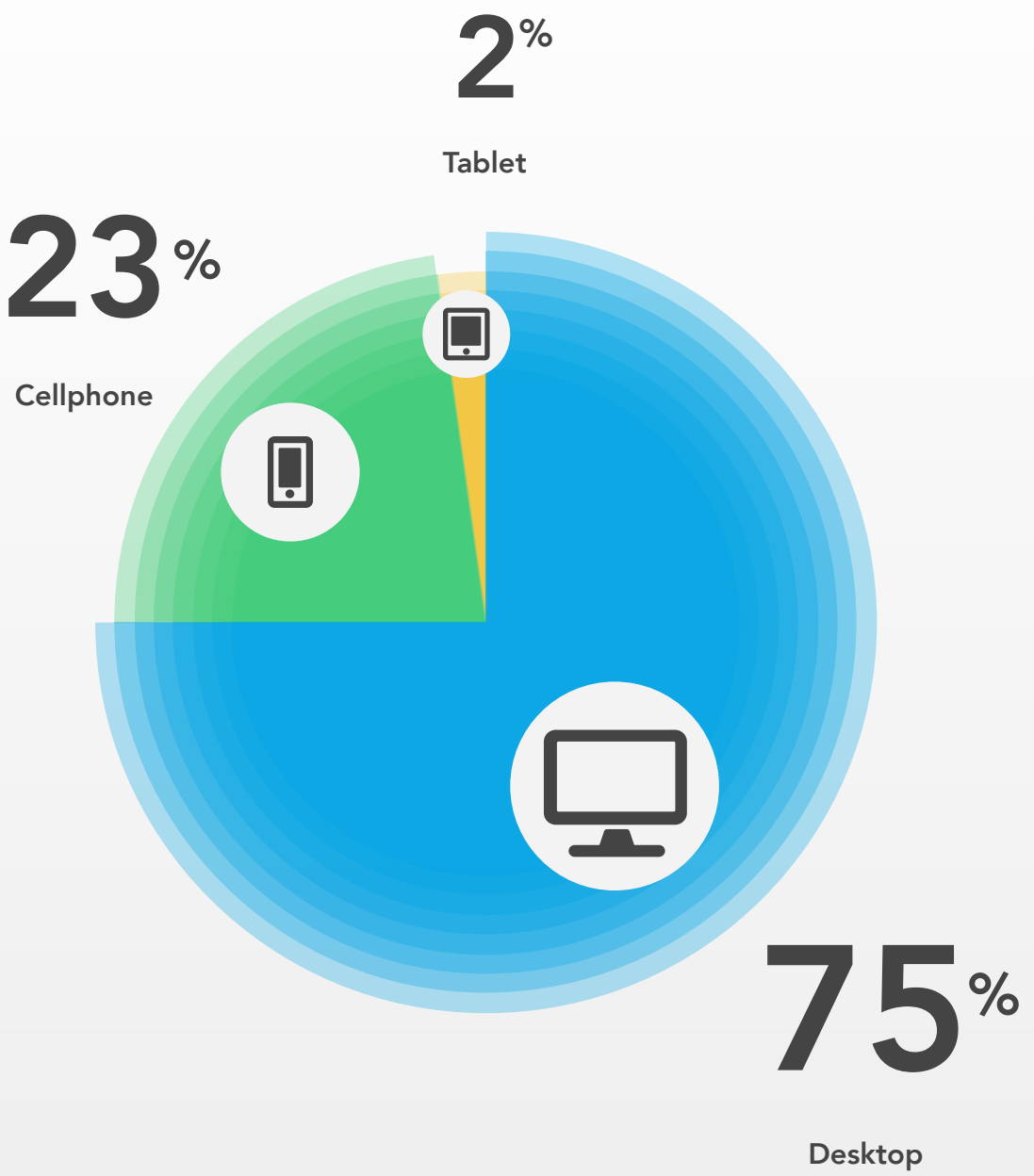
However, the results from our survey showed that this was not necessarily the preferred device for searching and buying a flight online. Respondents expressed **feeling reassured when using their desktop computers when searching and booking** their travel experience online.

Device Preference

Sharing that having a larger screen and multiple tabs provided them with a reassuring sense of security while also being able to have multiple tabs open to compare between sites and companies.

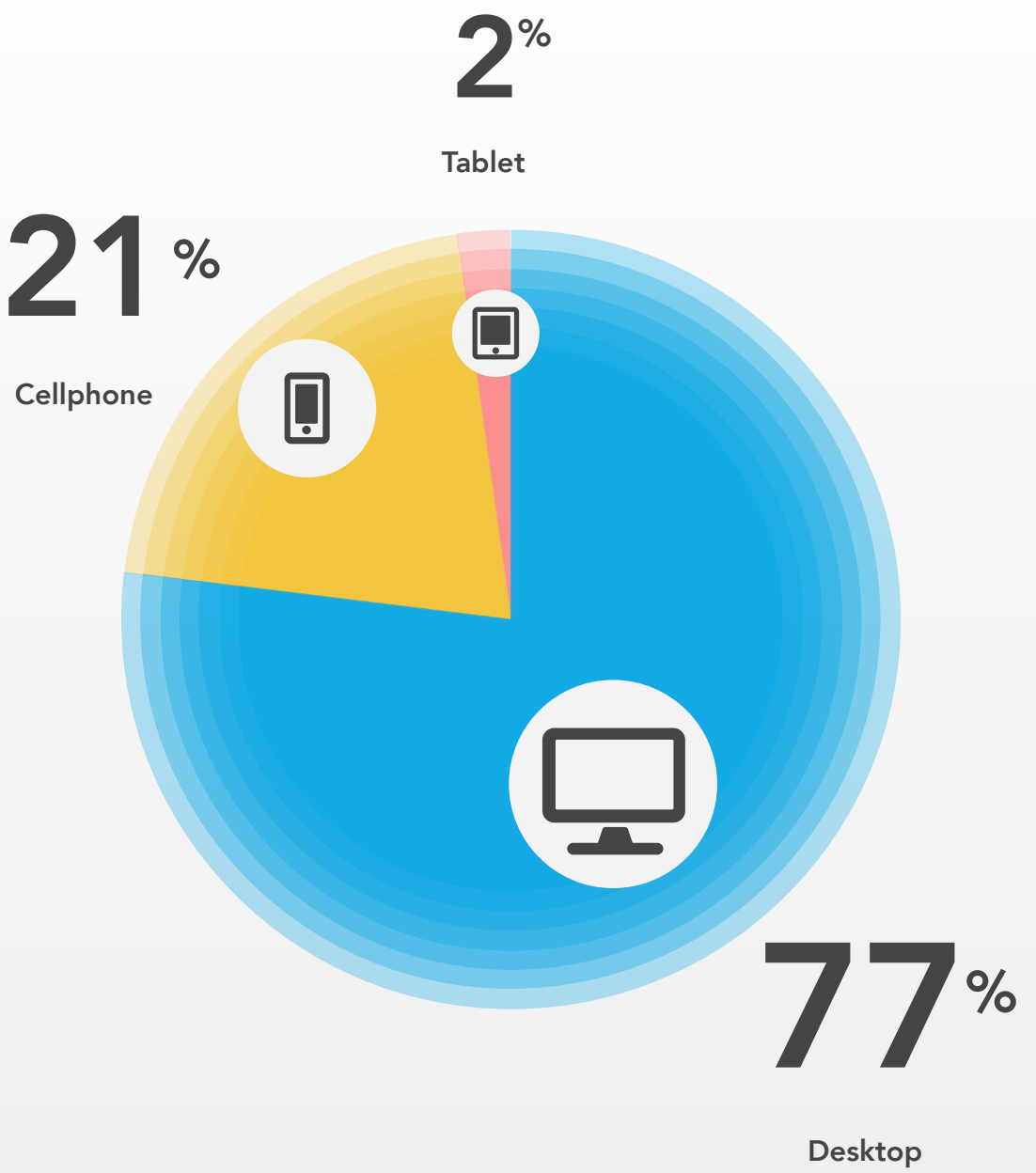
Respondents also stated a preference for booking their flights from 3rd party sites like Expedia, as they believed that they were able to **compare from a wider selection to obtain the best deal for their flight**.

Device preference when searching for a flight



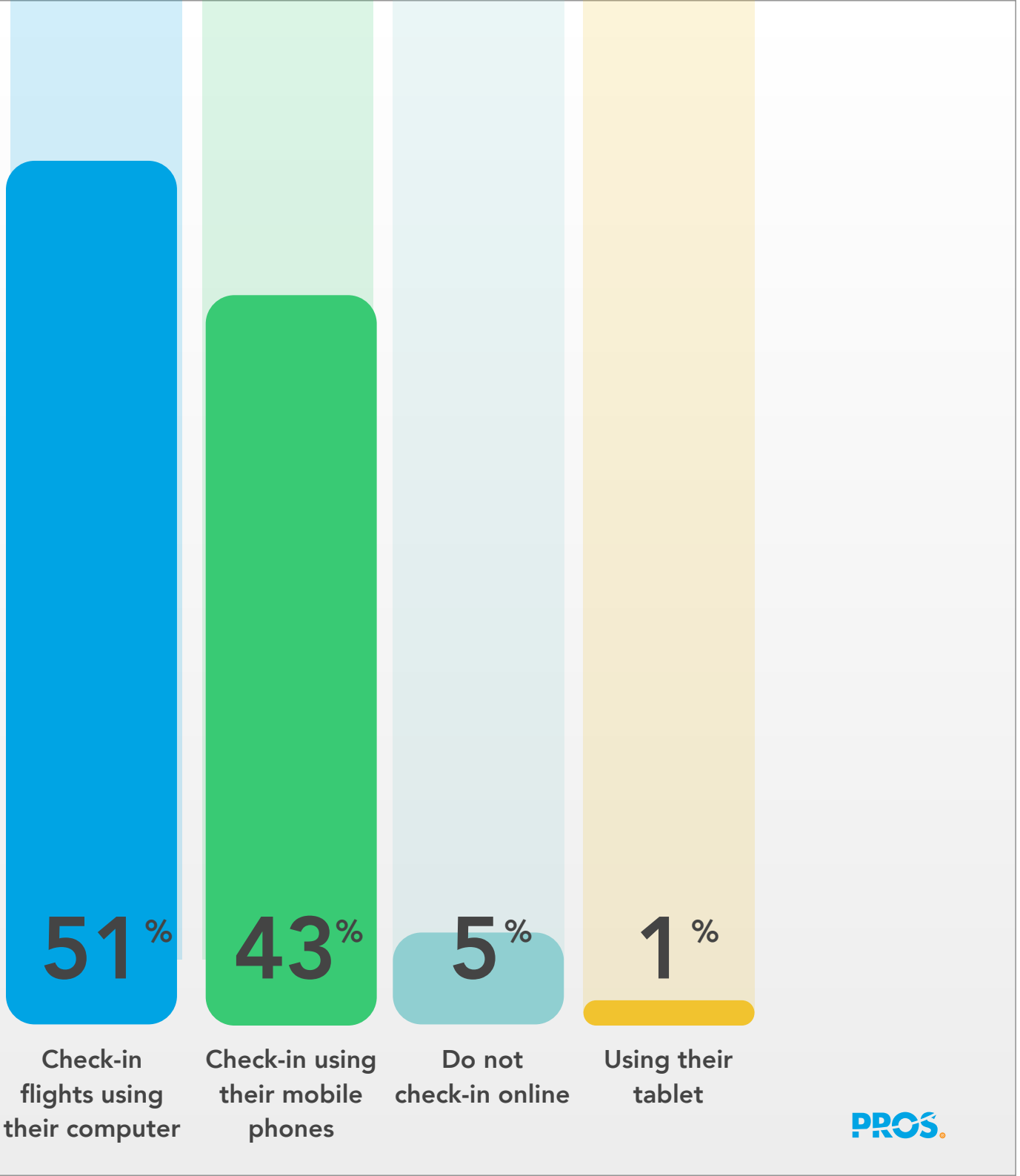
PROS.

Device preference when purchasing a flight

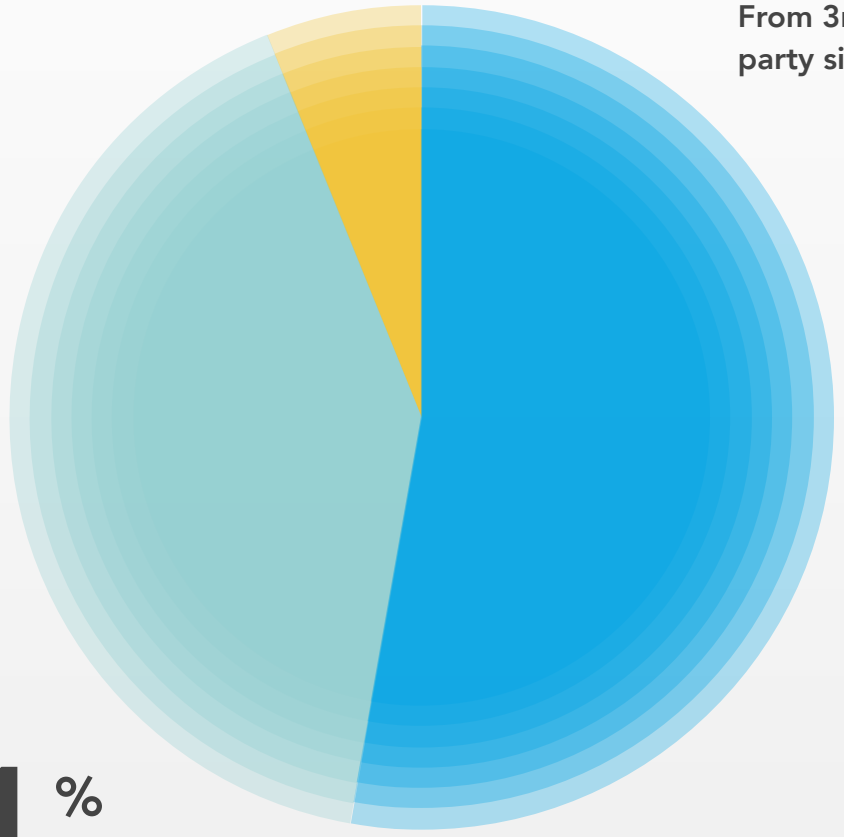


PROS.

Device preference when checking-in to a flight



Preference when purchasing flights



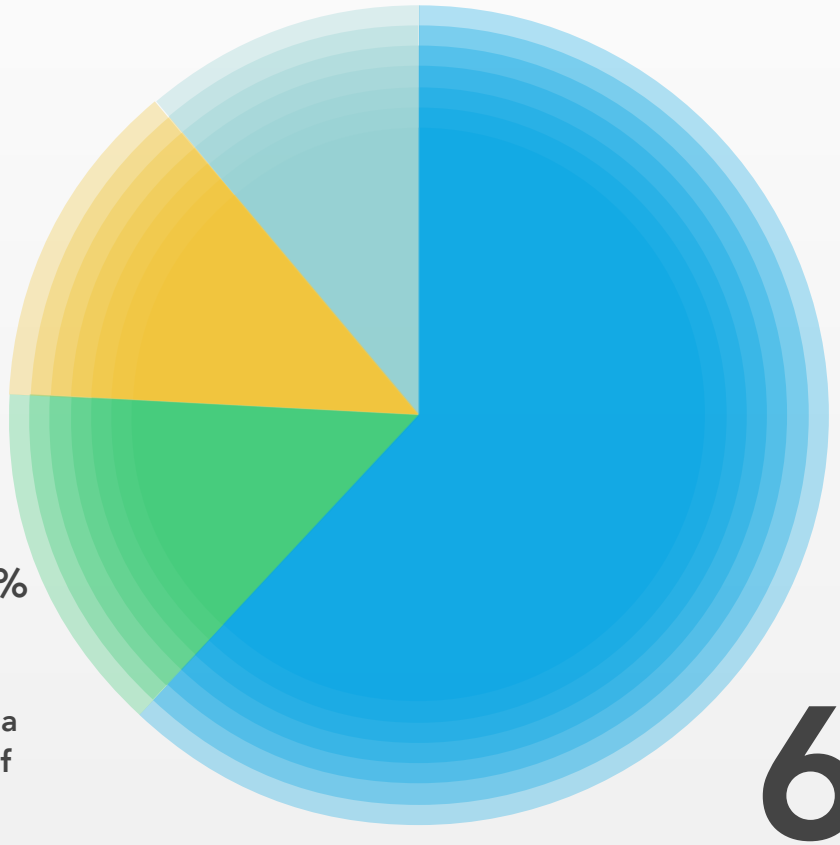
6%
From a travel agent

53%
From 3rd party sites

41%
Directly from an airline site

PROS

Reasons for preferring to use a 3rd party website?



11% The website is easy to use

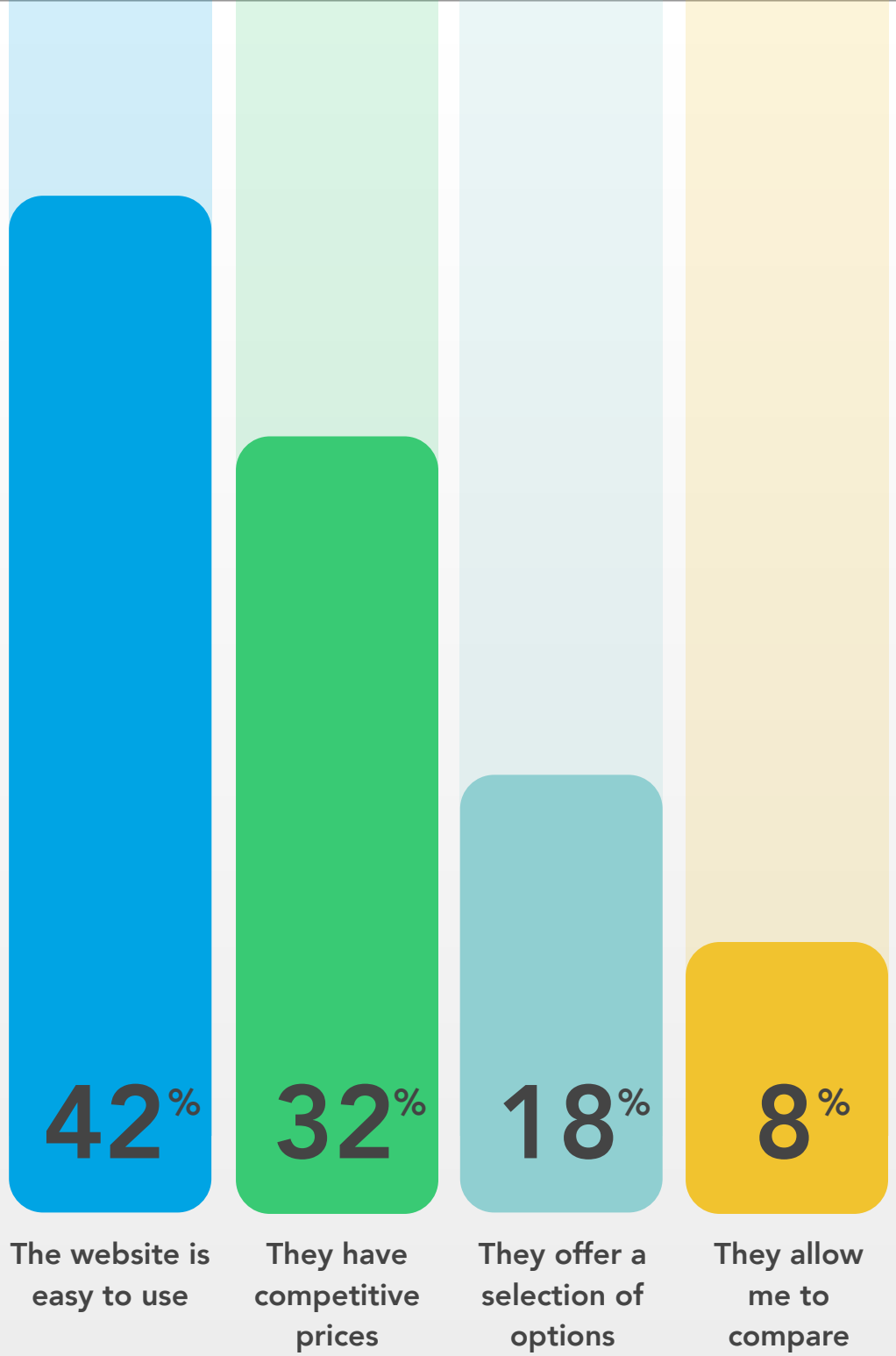
13% They allow me to compare flights

14% They offer a selection of options

62% They have competitive prices

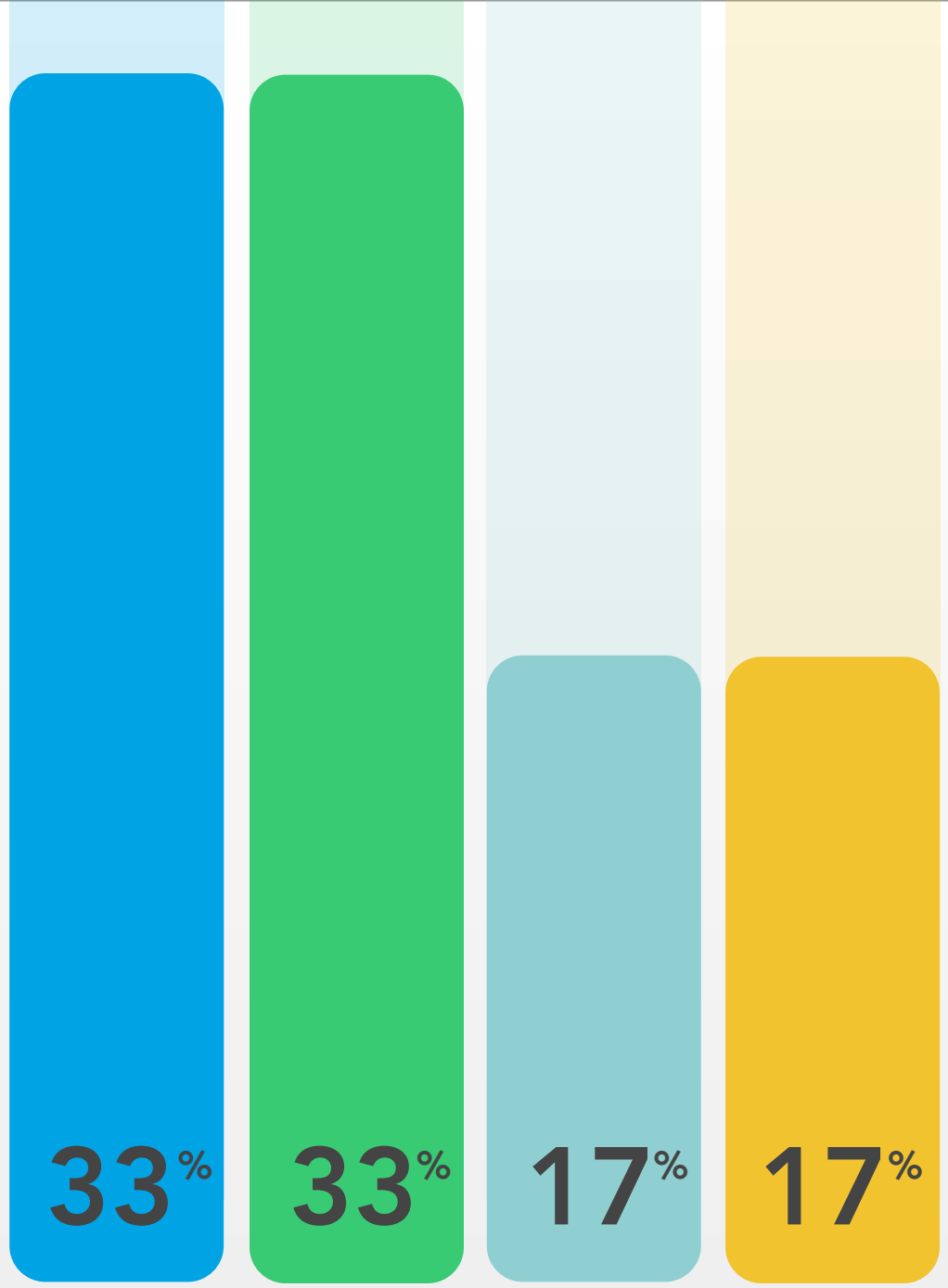
PROS.

Reasons for preferring to buy directly from an airline?



PROS.

Reasons for preferring to buy from a travel agent?



PROS.

"I like the process to be simple, straightforward and easy to accomplish."

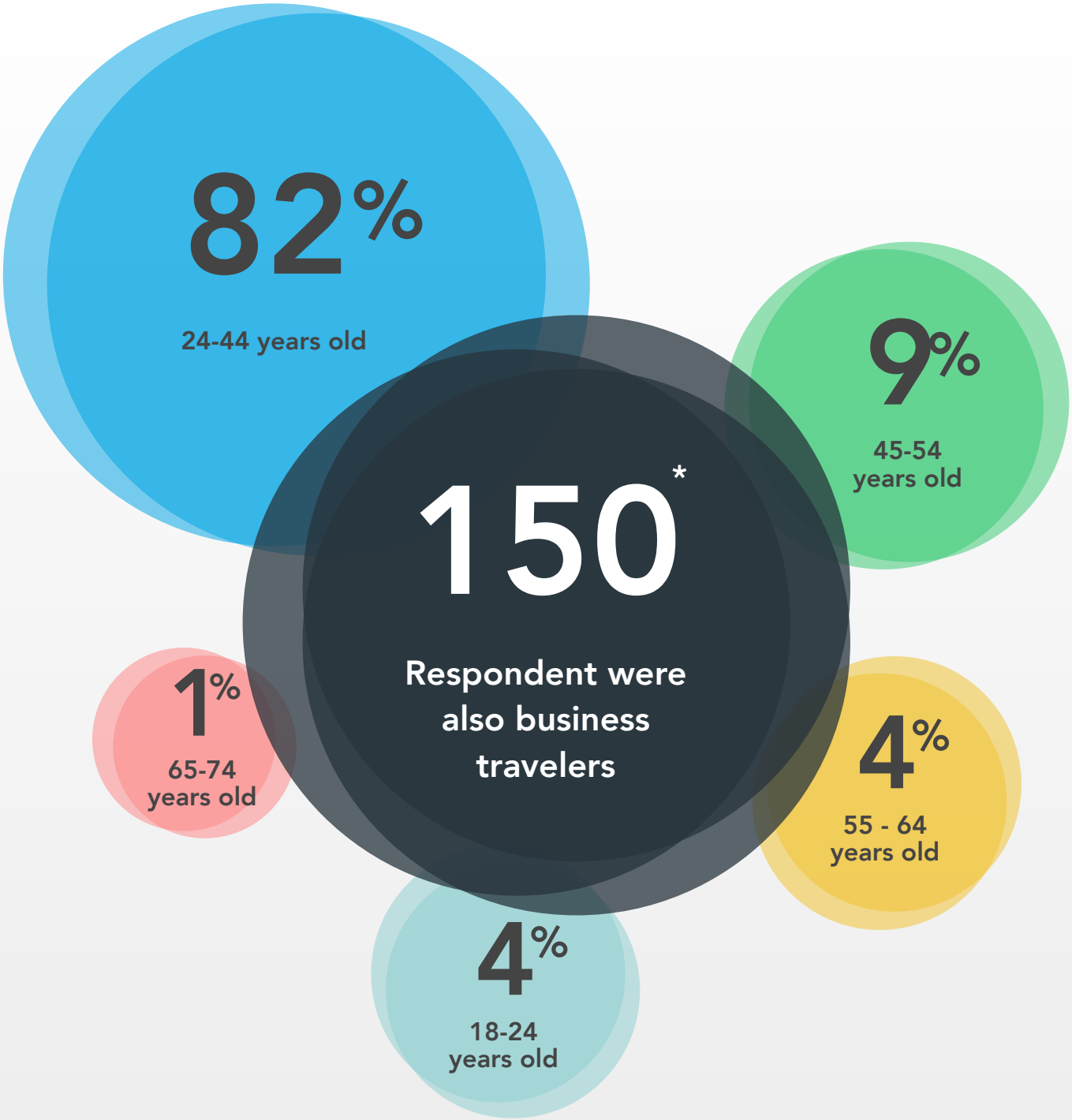
Business Travel Behavior

A trend we noticed from our survey was that **business travelers would often extend their trips into leisure trips.**

We also observed that a majority of business travelers would arrange their own bookings or trips compared to having a colleague perform the task for them.

Similarly to leisure travelers, business travelers also showed a preference for staying in a hotel when traveling for work or when extending their trip.

PROS.

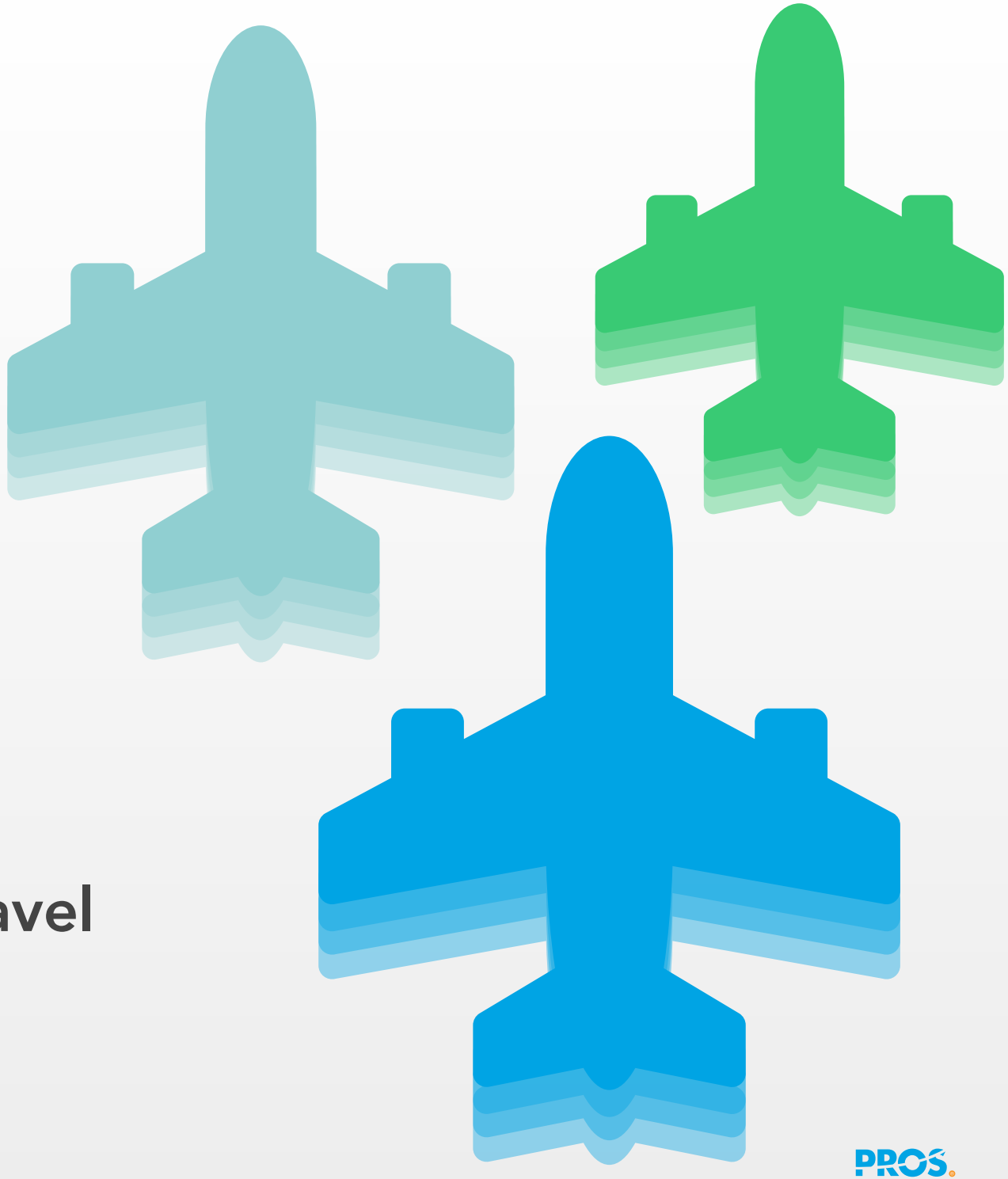


*Out of a total of 412 respondants

PROS.

60%

Of business travelers travel
1-3x times a year



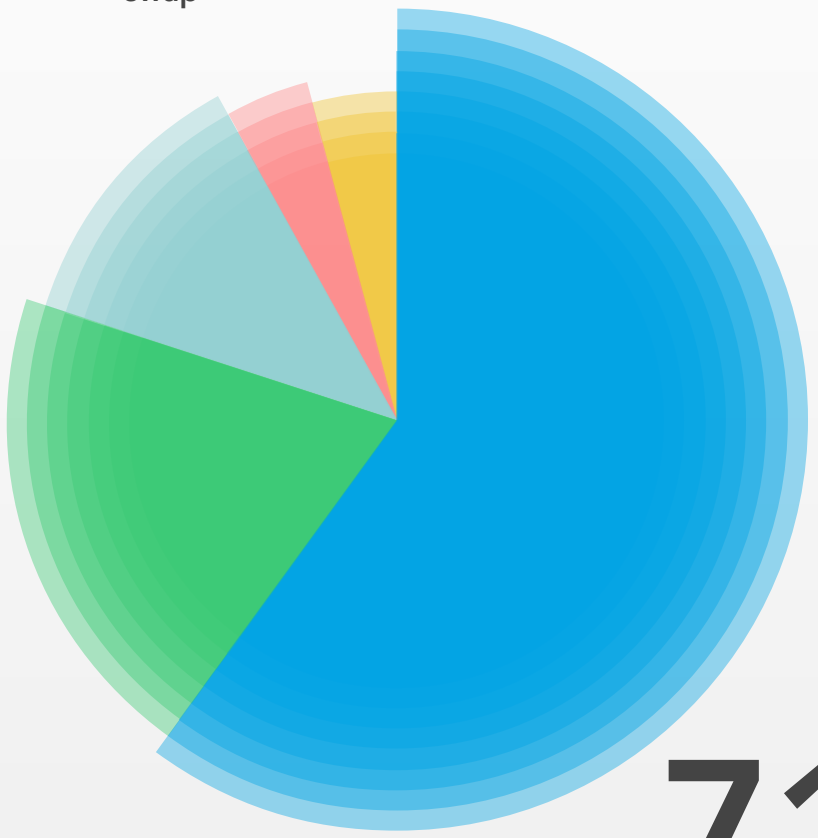
PROS

47%

Of business travelers
arrange their own trips

PROS.

When extending your business trip for pleasure, do you prefer to:



3% Do a house / apartment swap

5% Stay in a hostel

8% Stay with friends and family

13% Apartment rental, e.g. AirBnB

71% Stay in a hotel

PROS.

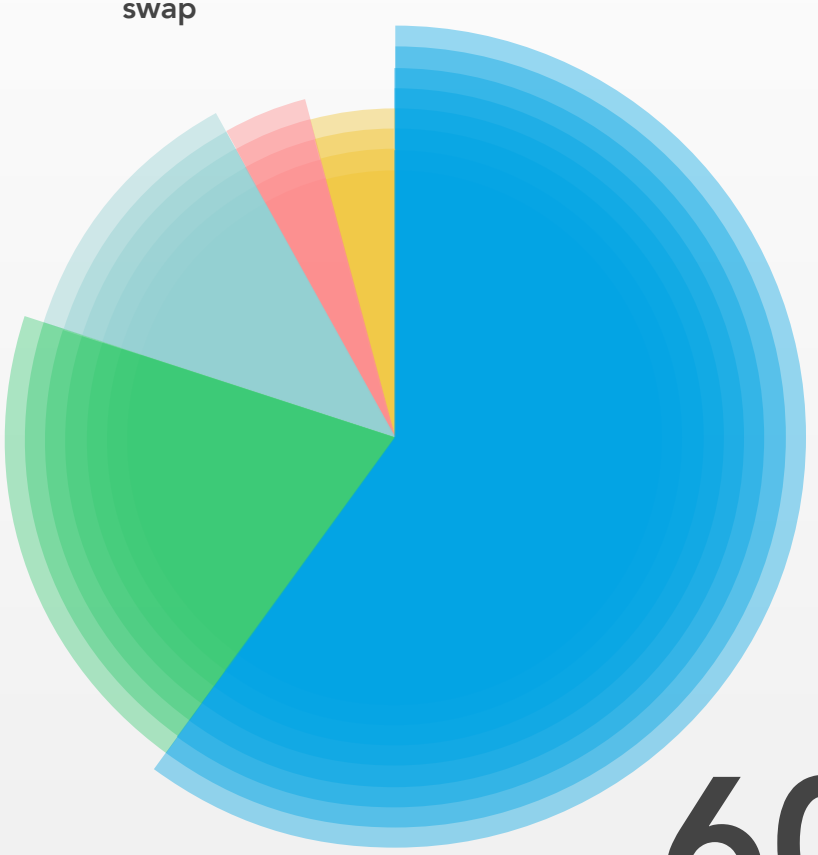
"When I travel for business I use a hotel, but if I am travelling for pleasure I use Airbnb. I don't envision booking a hotel through an airline - I have zero faith an airline would give me a good price on a hotel room."

Accommodation

We also observed that despite the rise in popularity of apartment rental services like Airbnb, respondents still had a strong preference for booking hotels during their trips.

However, when booking a flight and hotel together, respondents stated that **they prefer to first book their flights and return later to book their hotel.** Although there was an interest to have everything in one place to manage, it appears that there is a preference to first focus on being able to book a flight and returning a few days later to continue the preparations for one's accommodations.

When traveling for pleasure, do you prefer to:



4% Do a house / appartment swap

4% Stay in a hostel

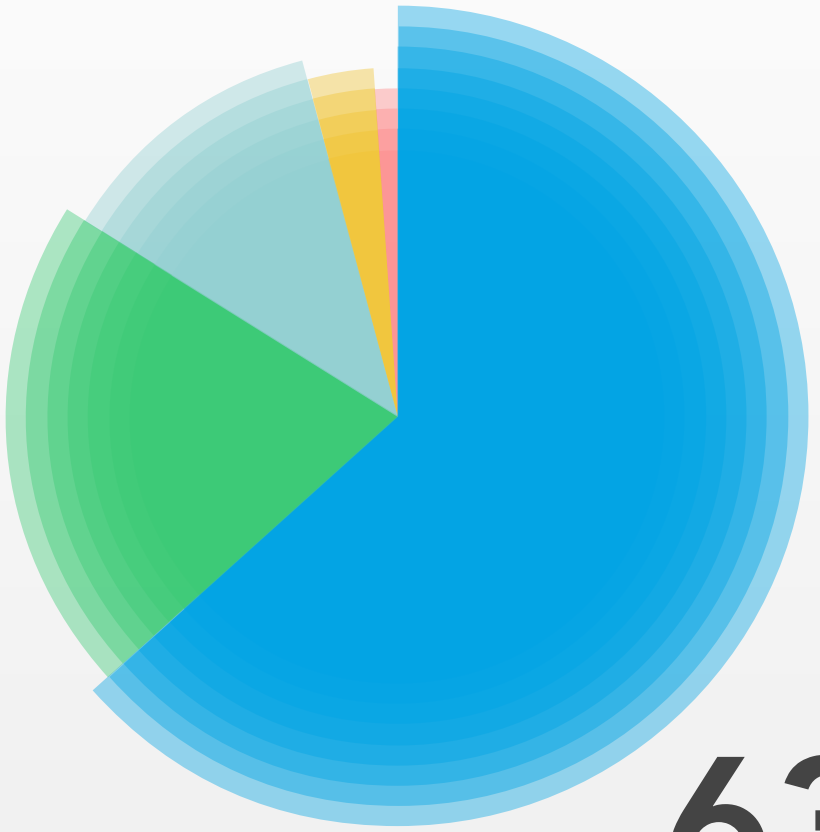
12% Stay with friends and family

20% Apartment rental, e.g. AirBnB

60% Stay in a hotel

PROS.

When do you normally book your accomodation?



3% Right before taking my flight

1% Once I arrive at my destination

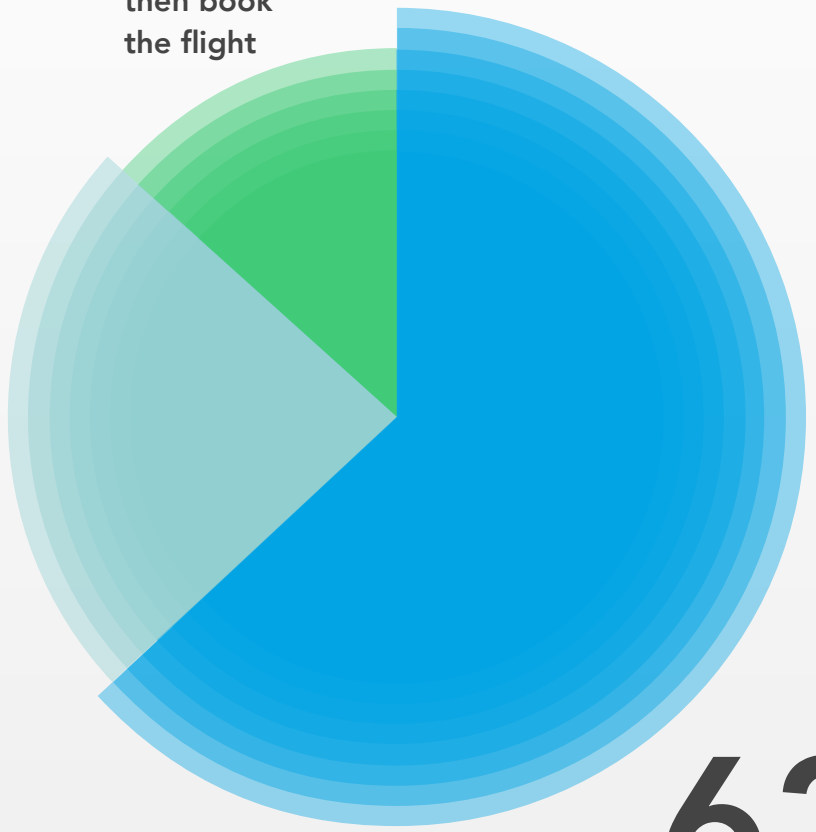
12% A few days after I book my flight

21% Right before booking my flight

63% Right after booking my flight

PROS.

If you were to purchase a flight and hotel directly from an airline, would you prefer to:



15%

Book the hotel and then book the flight

23%

Book both hotel and flight at same time

62%

Book the flight and then book the hotel

PROS

"Finding a good hotel at the desired location is stressful, comparing prices and decision making is a bit frustrating."

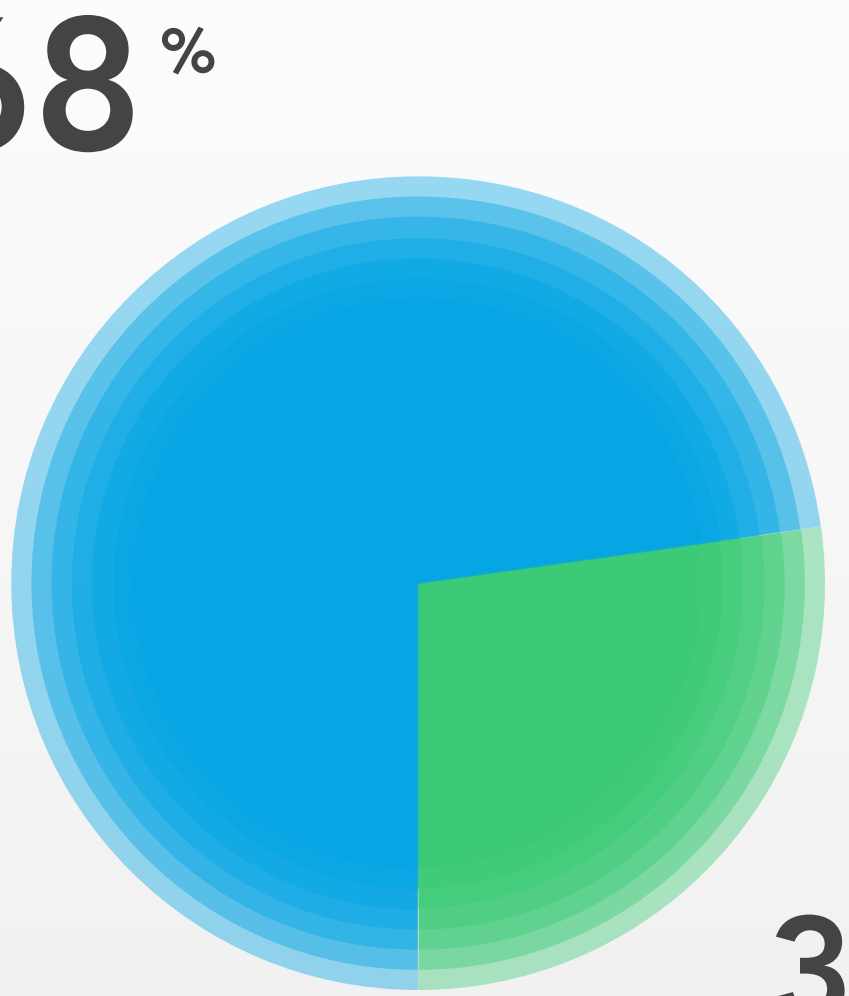
Stopover Experience

Our questions on the stopover experience showed that there were not many respondents who had already taken one. **Those who had taken a stopover were inspired by the opportunity of discovering a new city**.

For the respondents who had yet to take a stopover, they said that they would be interested in taking a stopover in the future if they were given a discount on their flight.

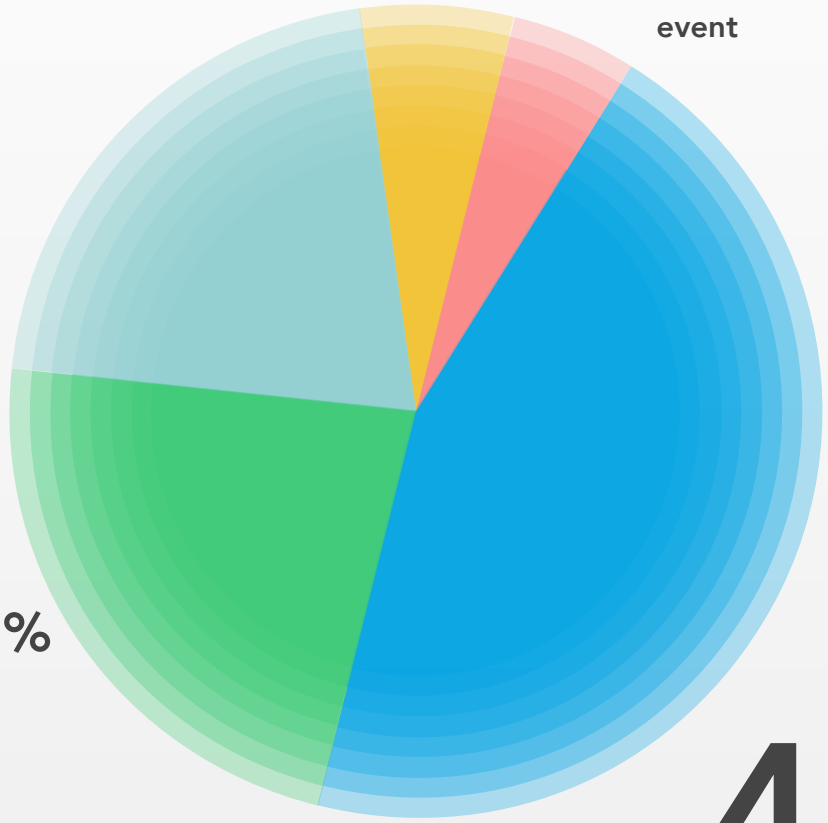
PROS.

Have you ever booked a stopover including a hotel through with an airline?



PROS.

What inspired you to take a stopover?



6%
To return back to a city that I have already visited

5%
To attend a cultural event

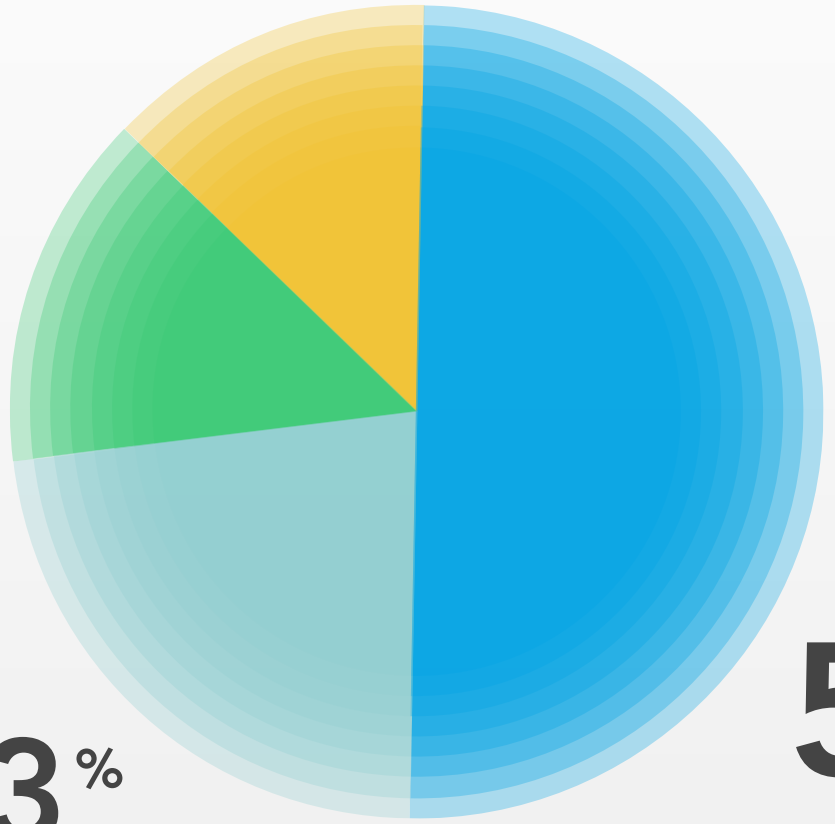
21%
To receive a good deal on the flight & hotel

23%
To visit friends & family

45%
To discover a new city

PROS

What would interest you in booking a stopover through an airline company?



12%
Obtain extras at a discounted price

14%
Be able to manage my hotel and flights at the same time

23%
Being offered a discount on my hotel

51%
Being offered a discount on my flight

PROS

"I would want them (hotel & airline) to be together if I chose the stop over because I would feel it is a respectable company."

Conclusion

In-depth research on travel behavior at the start of a pandemic could fall under bad timing. **As our survey began before the onslaught of Covid-19 and as we observed the global travel industry put to a halt. We modified our survey to ask participants to imagine how they would and had traveled previously.**

Overall, our research has allowed us to examine global behaviors when searching and booking online travel. Providing us with insights on a better understanding of who we are designing for to guide us towards making the appropriate decisions in regards to their subsequent needs.

We are curious to follow up in the future with this study to compare if and or how behaviors for searching and buying changed due to covid-19.

PROS.