



DIGITAL INSIGHTS FOR THE TRAVEL AND HOSPITALITY INDUSTRY

Presented by: BEAN Interactive
and Google Kenya



IMPACT OF DIGITAL MARKETING

THE EFFECT ON THE TRAVEL INDUSTRY

40%

Global Digital Travel Sales

Source: PhoCusWright

Online and Total Travel Sales Worldwide, by Region, 2010-2016

billions and % of total

	2010	2011	2012	2013	2014	2015	2016
Online travel sales							
US	\$139	\$145	\$151	\$157	\$165	\$173	\$182
Europe	\$118	\$129	\$141	\$150	\$159	\$167	\$176
Asia-Pacific	\$44	\$55	\$68	\$82	\$97	\$114	\$131
Latin America	\$8	\$11	\$15	\$19	\$24	\$29	\$34
Total	\$309	\$340	\$374	\$408	\$446	\$483	\$523
Total travel sales							
US	\$254	\$277	\$293	\$307	\$319	\$329	\$337
Europe	\$292	\$303	\$312	\$324	\$333	\$343	\$350
Asia-Pacific	\$256	\$274	\$290	\$308	\$323	\$339	\$356
Latin America	\$58	\$63	\$67	\$72	\$77	\$83	\$88
Total	\$860	\$917	\$962	\$1,011	\$1,053	\$1,094	\$1,131
Online as a % of total							
US	54.7%	52.3%	51.5%	51.1%	51.6%	52.6%	53.9%
Europe	40.4%	42.6%	45.1%	46.5%	47.8%	48.8%	50.2%
Asia-Pacific	17.2%	20.1%	23.3%	26.6%	30.1%	33.6%	36.8%
Latin America	13.8%	17.5%	22.2%	26.8%	31.3%	35.1%	39.0%
Total	35.9%	37.1%	38.9%	40.4%	42.3%	44.2%	46.2%

Note: numbers may not add up to 100% due to rounding
 Source: Barclays Capital based on PhoCusWright, "Internet & Media 101," Sep 28, 2012

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www.eMarketer.com

The Priceline Group Inc.



Expedia, Inc.



The main revolution has been the creation of the OTA category that now contributes over 40% of global travel sales.

GLOBAL MATURITY

DIGITAL SALES MATURE IN EMERGING MARKETS

30.6%

India's online travel sales Compound Annual Growth Rate (2011-2016)

Source: eMarketer

It is noted that the main reason for the growth of the key OTA players such as Priceline and Expedia is “international expansion”

Online and Total Travel Sales Growth Worldwide, by Region, 2010-2016

% change

	2010	2011	2012	2013	2014	2015	2016
Online travel sales growth							
Latin America	33%	38%	35%	30%	25%	20%	18%
Asia-Pacific	22%	25%	23%	21%	19%	17%	15%
Europe	10%	9%	9%	7%	6%	5%	5%
US	5%	4%	4%	4%	5%	5%	5%
Total	10%	10%	10%	9%	9%	8%	8%
Total travel sales growth							
Latin America	11%	9%	6%	8%	7%	7%	6%
Asia-Pacific	17%	7%	6%	6%	5%	5%	5%
US	9%	9%	6%	5%	4%	3%	3%
Europe	-3%	4%	3%	4%	3%	3%	2%
Total	7%	7%	5%	5%	4%	4%	3%

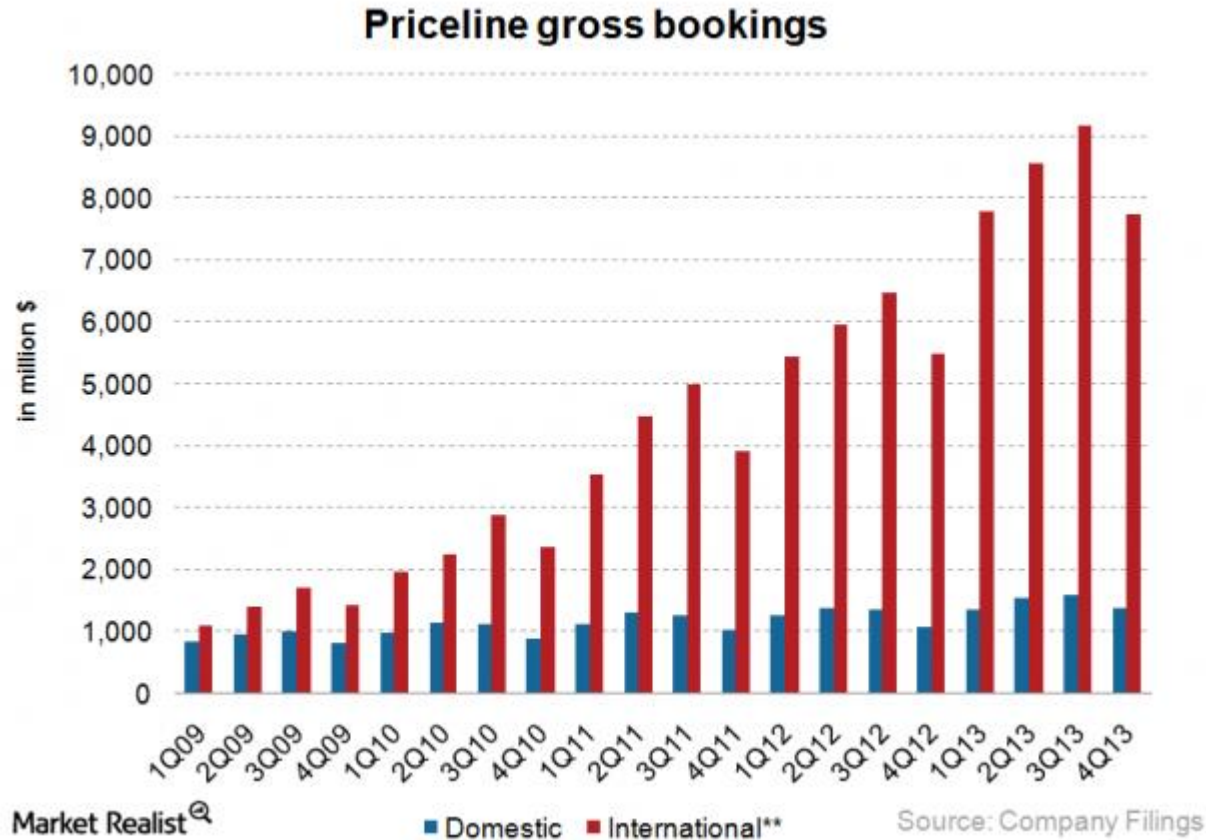
Source: Barclays Capital based on PhoCusWright, "Internet & Media 101," Sep 28, 2012

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GLOBAL MATURITY

DIGITAL SALES MATURE IN EMERGING MARKETS



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THE DIGITAL TRAVELER

How the internet has affected the attitudes and behaviours of leisure and business travellers.

THE TRAVELLER'S MINDSET

THE INTERNET IS AS ESSENTIAL FOR INSPIRING NEW TRAVEL AS IT IS FOR PLANNING TRAVEL

68%

began researching online before they decided where or how to travel
versus 65% in 2012.

64%

of business travelers always "start my travel booking and planning process with search."
Up from 58% in 2012

65%

book travel directly on company sites more often than via online travel agencies,
an 11% increase from last year.

58%

of leisure travelers always "start my travel booking and planning process with search."
Up from 56% in 2012

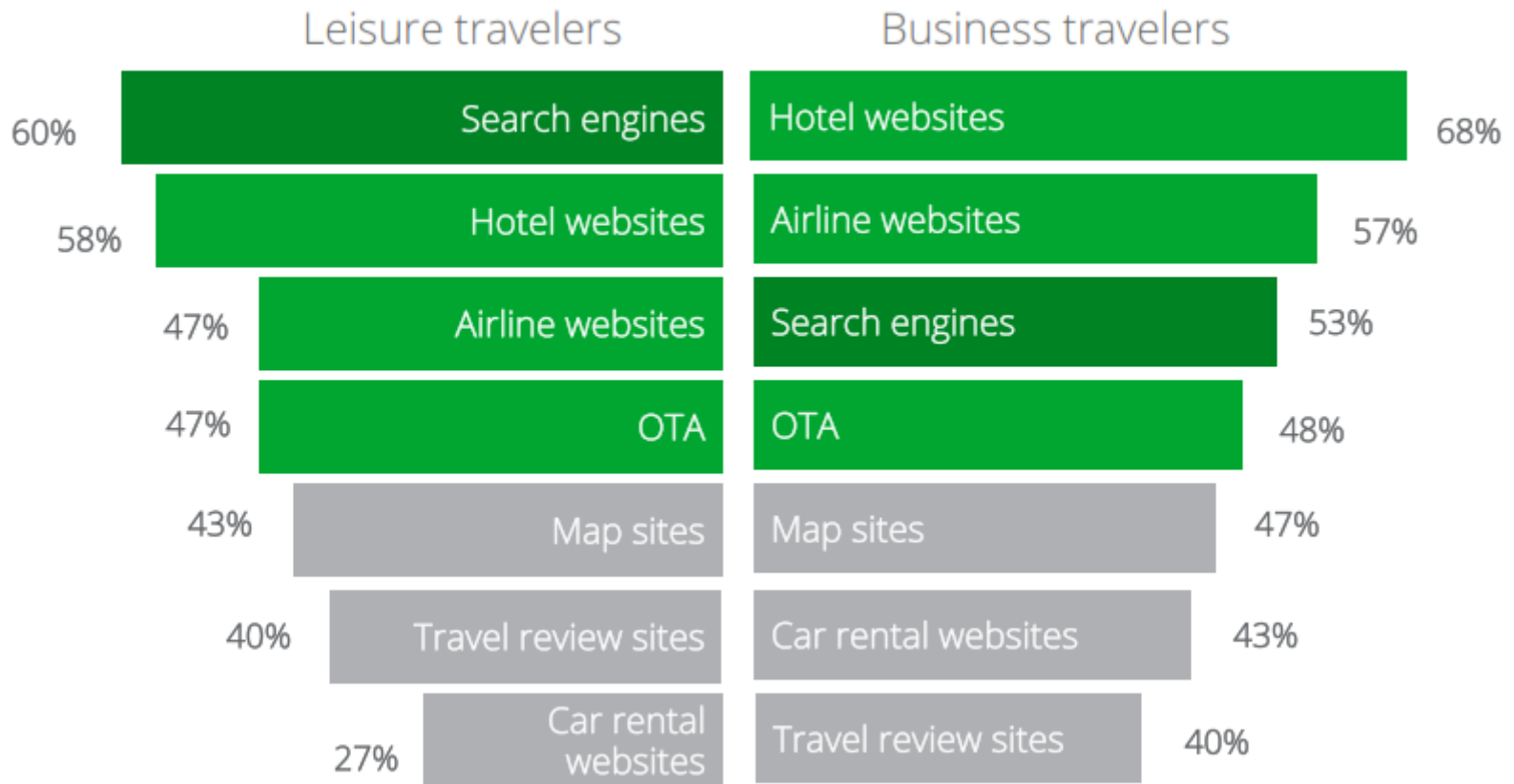


Source: Ipsos MediaCT/Google Travel Study, May-June 2013.

PATH TO PURCHASE

AMONG ONLINE SOURCES, TRAVELERS MOSTLY RELY ON BRAND SITES AND SEARCH

TOP ONLINE TRAVEL ACTIVITIES



Source: Ipsos MediaCT/Google Travel Study, May-June 2013.

THE OPPORTUNITY



DIRECT DISTRIBUTION

Transient* Hotel Reservations in North America, by Channel, 2011 & 2012

% of total

2011

26.1%	23.3%	22.8%	18.2%	9.5%
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2012

26.7%	22.5%	22.7%	17.7%	10.4%
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■ Brand website

■ Direct

■ Global distribution system (GDS)

■ Central reservations system (CRS)

■ Online travel agency (OTA)

Note: reflects bookings from participating brands in top 25 markets in North America; numbers may not add up to 100% due to rounding;

**individual business and leisure travelers*

Source: TravelClick, April 22, 2013

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www.eMarketer.com

Despite the growth in OTA bookings, there has been a parallel growth in **direct distribution**

online travel purchases and by 2014, two-thirds of all online bookings for hotels, cruises and airline tickets will be made through suppliers' websites, rather than through third-party OTA's.

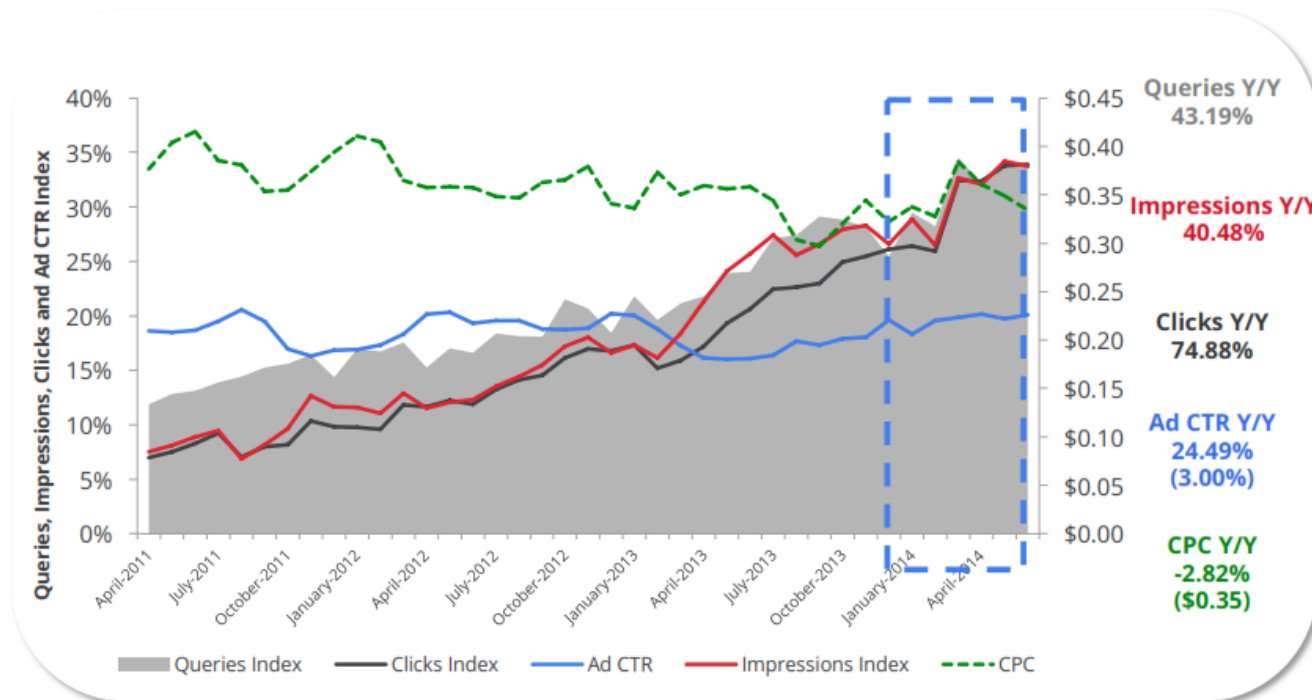
Source: PhoCusWright

LOCAL MARKET POTENTIAL

Queries grew by 43% in Q2 2014 in the Travel & Tourism Category
Desktop queries grew by 17%, while Mobile queries grew by 126% and Tablet searches grew by 43% YoY in the same period



Travel & Tourism: All Devices Auction metrics evolution



Source: Google internal search data, based on pre-categorised queries for the Travel & Tourism. Note: In-quarter metrics for Query Volume and Ad Depth are only available.

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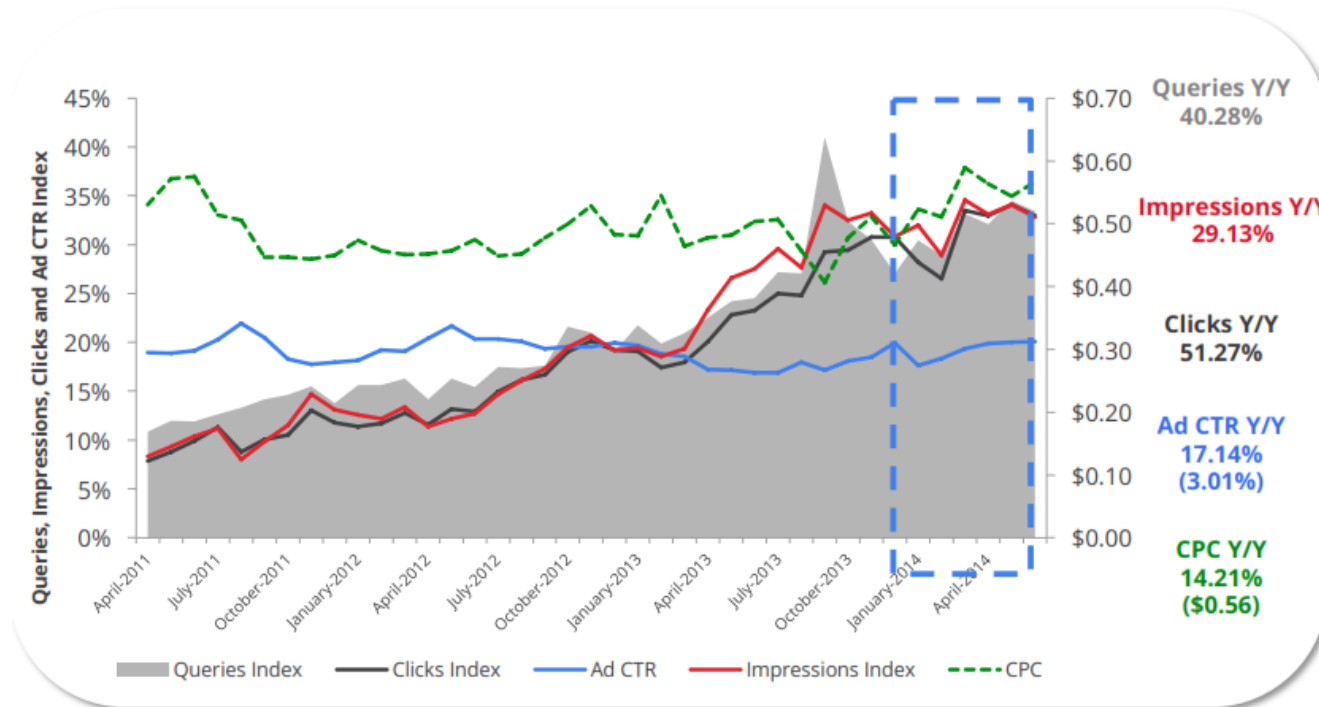


LOCAL MARKET POTENTIAL

Queries grew by 40% in Q2 2014 in the Hotels, Motels & Resorts Category
Desktop queries grew by 14%, while Mobile queries grew by 112% and Tablet searches grew by 36% YoY in the same period



Hotels, Motels & Resorts: All Devices Auction metrics evolution



Source: Google internal search data, based on pre-categorised queries for the Hotels, Motels & Resorts. Note: In-quarter metrics for Query Volume and Ad Depth are only available.

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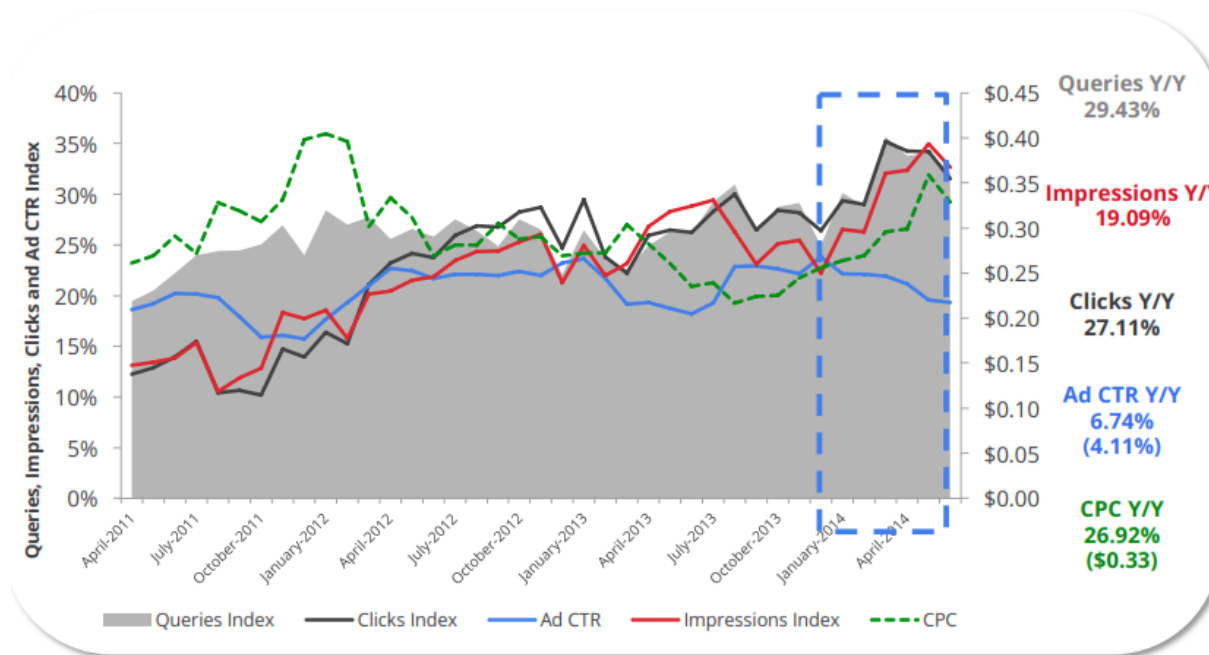


LOCAL MARKET POTENTIAL

Queries grew by 58% in Q2 2014 in the Airline Tickets, Fares & Flights Category
Desktop queries grew by 29%, while Mobile queries grew by 154% and Tablet searches grew by 49% YoY in the same period



Airline Tickets, Fares & Flights: Desktop Auction metrics evolution



Source: Google internal search data, based on pre-categorised queries for the Airline Tickets, Fares & Flights. Note: In-quarter metrics for Query Volume and Ad Depth are only available.

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A close-up photograph of a desk setup. A silver laptop is open, with a black spiral notebook and a black pen with gold accents resting on it. Several business cards are scattered on the laptop keyboard. One card is gold with the text 'MIND WITH' and 'ESTABLISHED 2014'. Another card is blue and white with the text 'ECONOMY CLASS'. A large, stylized blue graphic element, resembling a speech bubble or a large letter 'C', is overlaid on the left side of the image, containing the text.

SEIZE THE MOMENT

Give the opportunity for your inbound market to book through you directly.

ONLINE VALUE PROPOSITION

The online value proposition should state the intrinsic benefits a visitor will get from the site, content, web service or functionality.

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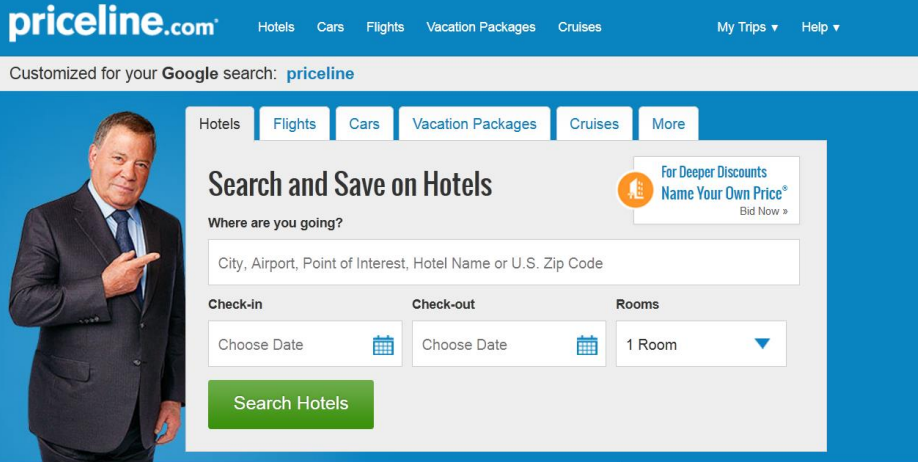
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ONLINE VALUE PROPOSITION



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Priceine's OVP is on the savings discount on hotels.

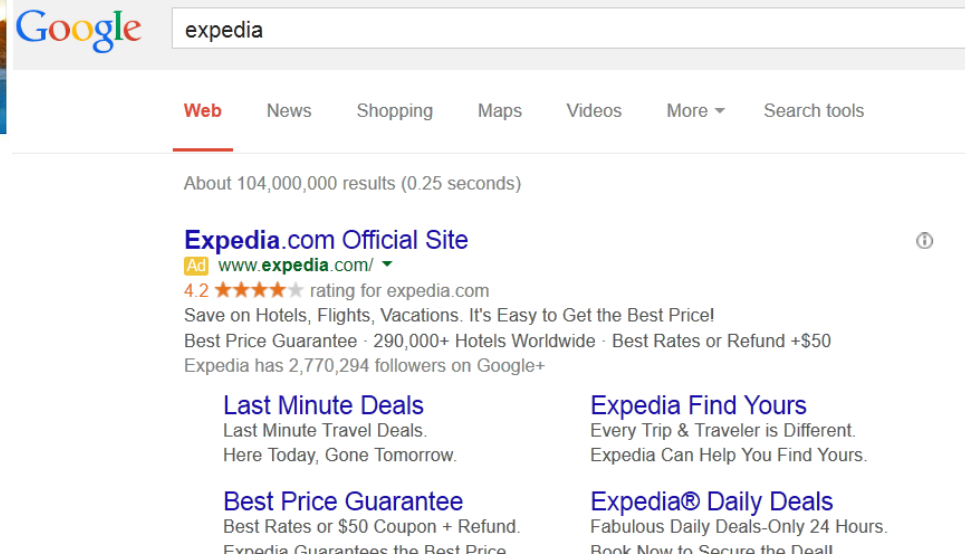
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Book Now to Secure the Deal!

ATTRACT INTEREST

UTILIZING TARGETED ADVERTISING CAMPAIGNS TO REACH YOUR TARGET AUDIENCE

See below an example showing the number of monthly searches for Kenya travel related search terms in **Kenya, USA** and **UK**.

kenya safari, hotels in kenya, flights to kenya

Travel & Tourism

Search volume trends

Average monthly searches



DOES IT WORK

SOME CAMPAIGN HIGHLIGHTS



LOEWS

HOTELS • RESORTS

THE GOALS

- Capture online share of voice
- Expand reach to a wider audience
- Reach qualified people similar to current customers

THE APPROACH

- Moved 70% of budget from offline to digital: 40% on search, 60% on display
- Began using Google Display Network, Remarketing
- Boosted budget, used Similar Audiences for Loews Regency Hotel campaign

THE RESULTS

- Overall: 10%+ revenue, 9%+ bookings, 5%+ unique site visitors
- Remarketing generated \$60,000 for \$800 spent
- Loews Regency Hotel campaign: 60%+ revenue, 57%+ bookings, CPA dropped 9%
- Cyber Monday campaign: Grew revenue from \$1.3M to \$2M YOY

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DOES IT WORK

SOME CAMPAIGN HIGHLIGHTS



THE GOALS

- Make the Accor Hotel brand top-of-mind for potential travelers
- Make the consumer online booking experience as relevant and seamless as possible
- Increase conversions and traffic to Accor Hotel sites

THE APPROACH

- Implemented Ad Extensions to reach customers with the right messages at the right time and stand out in the competitive online hotel landscape

THE RESULTS

- Increased CTR 4% using Call Extensions
- Increased CTR 9% using Local Extensions
- Sitelinks and Image Extensions nearly doubled CTRs on enabled Adwords ad groups from 13% to 24%
- Increased CTR 6% using Social Annotations on brand terms
- Increased CTR 19% using Review Extensions
- Sitelinks and Form Extensions resulted in a 14% increase in incremental conversions

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DOES IT WORK

SOME CAMPAIGN HIGHLIGHTS



DOES IT WORK

SOME CAMPAIGN HIGHLIGHTS

DOES IT WORK

SOME LOCAL CAMPAIGN HIGHLIGHTS



Duration:
4 weeks

Campaign Impressions:
7,589,257

Campaign Clicks:
7,676

Qualified Financing Leads:
373



Better. Simple. Life.

Duration:
6 weeks

Campaign Impressions:
15,927,845

Campaign Clicks:
13,989

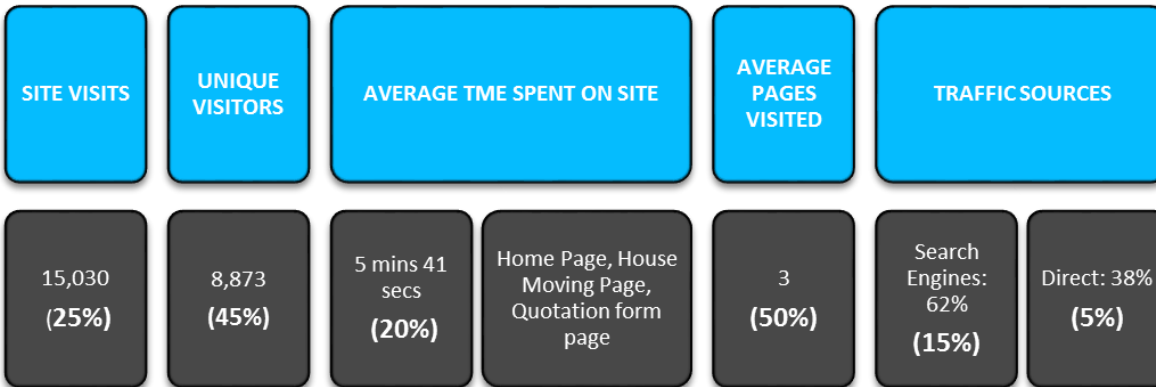
Qualified Insurance Leads:
453

DOES IT WORK

SOME CAMPAIGN HIGHLIGHTS

July 2011 – July 2012

Marketing Effectiveness



To date, around 30% of revenue for the company is generated from its digital strategy primarily driven by Google Keyword Advertising.

Business Contribution



Between July 2013 and July 2014 the company received a total of **2,706** leads from its website.

PERFORMANCE ADVERTISING

YOU PAY FOR ACTIONS

The best thing about online advertising, is that you don't pay to be seen. **Impressions are FREE.**

You only pay for actions taken i.e. CLICKS.

Meaning as long as you have a clear call to action and a strong OVP you only pay for interactions with people who are interested in your product/ service.

TECH REVIEW

YOUR
AD
HERE

START YOUR ONLINE CAMPAIGN

Our dedicated digital marketing team are on hand to answer your questions and setup meetings with you.



**THANK
YOU**

