
The shifting advertising environment for the travel industry: A look into the sources and driving mechanisms determining where and how we get our information

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"I have neither given nor received unauthorized assistance while preparing this assignment and I have written the code myself."

Bla. Sith

FOR A RECENT TRIP MY WIFE AND I TOOK TO GREECE, we undertook the daunting task of plotting out ten days worth of plans that included travel, lodging, activities and dining. All of these aspects were in a destination that neither of us had ever been to nor knew anyone who had ever been to the islands in the Cyclades of Thira (Santorini) or Naxos or the capital of Greece, Athens. With a somewhat limited budget and an unlimited amount of information to comb through to make decisions, we first how to decide how we would go about getting the information that seemed accurate, current, and worthwhile. One option that we could explore was relying on a travel agent to book everything for us. Although this option would have most likely been much better for our mental well-being in the planning stages, there was something missing from that process that would not have made the trip feel a little less “ours.” There is an aspect to getting to know the places and things one will do that makes the vacation more real while providing a sense of ownership pride to the whole event. We decided to forego the travel agent option, although we are sure they provide a lovely service, and try to figure the whole thing out ourselves.

Our next option for finding information about these places in Greece was to consult travel guides. There are a number of recognizable, well-established publishers like Frommer’s, Fodor’s and Moon that provide travel guides to seemingly any location one could wish to think of. After looking at the offerings of each, we decided to purchase *Frommer’s Greece* (Sixth Edition) which was printed in 2008. This book provided over 700 pages of information on nearly all aspects of Greece, including the dozens of islands we would not be going to or the hundreds of hotels where my wife and I would not be resting our heads at night. Although it was a good guide with maps of Athens (which did come in handy), it really only contained about ten pages of information that we would could use during our trip and maybe a few pages that we

actually did use on our trip. Because of the sheer number of topics that need to be covered in a book that attempts to be fully inclusive of Greece, it did not go very in depth into the areas where we would be spending the bulk of the trip. Even though we did not regret the purchase of the book, we did not get as much as we would have liked out of it and felt that the trip would not be as we had hoped it would transpire if we were to use this as our guide in preparing our itinerary.

Continuing with the traditional media route, we next searched for travel magazines that included information about Greece, and in particular, the islands that we were going to. These magazines allowed a little more freedom in the amount of space provided about a certain location and gave some good tips as to what to do on the trip. One problem we encountered though was that most of the activities provided could be considered on the luxurious side of the coin, with some of the hotels' nightly rack rates exceeding the amount of money we wanted to spend on our entire trip. We found that more in-depth information helpful, and we did glean some information that we could not acquire from the travel guide, but in the end the expansive list of information we were hoping to find was not provided, giving us merely a few more blocks of information on which to base our decision. If we really wanted to find a great amount of information, we needed to head to the biggest information source there is: the Internet.

This source of information was like no other. Instead of only having a few options from which to base decisions, we had a plethora of sites with numerous angles and aspects to uncover for our decisions. We were weighing an inordinate number of options and viewing websites for hotels, restaurants and services that all claimed to be the best on the islands. To help us parse out some options, we ventured into the review and opinion websites that cover various aspects of travel. The reviews are provided by fellow travelers from around the world and may be posted by any person that feels as though he or she has some insight to share. The information provided

was not monitored for accuracy in any formal way, and the only method of fact checking was by pitting that information against that provided by other opinion posters. Even at that point, it was a “he said, she said” affair with one only hoping to have a wealth of corroborating opinions to aid in supporting one side or the other.

Without any waffling toward the side of traditional media, we decided that this method of research gave us the best chance to really select options for our vacation. Instead of a dearth of information, we now were presented with a wealth. Instead of staying at a hotel that was recommended by one travel guide, we could scour these review sites and find the most current opinions that met the criteria of what we sought in a hotel. Instead of settling, we could be satisfied. The amount of information made us work for our final decision, but as we experienced, the work that went into this planning more than made up for it in the results that came from our labor.

An interesting aspect that I later thought about was how little of the information that went into our considerations could be classified as advertising. I would say that none of our decisions were influenced by advertising, but as an advertising professional, I know better than to consider that a possibility. In looking through the magazines or viewing web pages online, I am sure that an advertisement was noticed that then produced some level of thinking about a particular hotel or restaurant. That miniscule pondering may have lead to us looking at reviews for a restaurant and then marking that down as one we would attempt to visit. Even so, the fact that advertising was not intentionally sought to aid our process or that a recollection of an advertisement in any of those media is somewhat surprising. Traditionally, advertising has been a substantial form of product information. In travel, it can be safe to say that this has also the case. But where does

advertising fall in with the model now? With all of this other information provided on the Internet, what role does advertising play in the travel industry?

Compiling these circumstances, I generated a number of questions that I feel may be important to understanding the impact of the social media on the travel industry, such as travel review and opinion sites, and even social networks, such as Facebook, Twitter, and WAYN (Where Are You Now?). Does comfort with social networking websites and online consumer shopping increase the likelihood that one would be comfortable basing travel decisions on the recommendations of (unknown) others? Is personal identification, such as a perceived similarity, with the individual providing online travel opinions important in determining whether one will use online travel opinions in their decision-making process? How important are the concepts of media credibility and source credibility in the decision-making processes of people who use online travel opinion sites when making travel choices? If one does seek opinions of travel online, is that person less likely to view advertising to collect information? Lastly, is there a difference in willingness to base travel decisions on online recommendations by age? My goal in this research is to provide some insight into these phenomena so as to shed some light on a rapidly changing consumer field. In doing so, I hope to lay the groundwork for further study to see what mechanisms are being employed in evaluating online information and potentially understand what can be expected of future developments in the travel marketing industry. Ultimately, I would like to answer the question: What is going to happen to travel advertising?"

Consumer and travel online review sites

Online consumer reviews and opinions have made an impact on consumers' understanding of product info. These reviews are similar to word-of-mouth referrals, in which interpersonal communication is conducted to share information regarding a specific product or service. Prior to the development and growth of the Internet, word-of-mouth referrals were limited to the ability that one could connect with members in a similar social network. Today, online shoppers can collect far more information beyond that provided by the producer or retailer, as consumers have the ability to review the product themselves and post their opinions to retailer sites, personal weblogs, or social networking sites for potential buyers to see. Despite this lack of control maintained by the producer or retailer, this information also can provide a marked advantage for them, with studies showing that products receiving a recommendation are being purchased as much as twice as often if recommended by a reviewer versus those without a recommendation.¹

This sector of online media (and the potential to place user-generated, product-specific information online) is growing. The Nielsen Company recently issued a press release reporting that time spent on social network and blogging sites accounted for 17% of all time spent on the Internet in August 2009, an increase of nearly 300% from the same time a year ago.² Not surprisingly, the amount of money spent on online display advertising on top social networking sites more than doubled year-to-year across the industries that Nielsen covered. This, however, does not represent an overall increase of advertising expenditures across the Internet; in fact, several industries decreased their total online ad spending. From August 2008 to August 2009, total advertising expenditures on online social network sites jumped from 7% to 15%, an

indication that marketers are recognizing the ability of social networking sites to connect with potential clients in a more targeted and impactful way than other forms of Internet advertising.

Possibly a precursor to the recent increase in online social media expenditures, a different global report conducted by The Nielsen Company recently found that consumers trusted the opinions of both friends and others online more than they did brand advertising. Ninety percent of respondents in the study reported that recommendations from friends were trusted, while 70% reported trusting consumer opinions online.³ The opinions placed by consumers online rated comparably with the perceived trustworthiness of editorial content, showing that consumers trusted information obtained from others online just as much as they did from established names or experts. An earlier study that recorded the trustworthiness of various forms of communication found that online consumer reviews were considered three times more trustworthy than social networking profiles created by companies and two times more trustworthy than e-mails sent from brands.⁴ Advertising, the traditional source of corporately-financed product-relevant information, engenders far fewer feelings of trustworthiness. Recent figures found perceived advertising trustworthiness at 14%, nearly five times less than online reviews.⁵ These feelings suggest a potential change where and from whom consumers collect information, leading consumers to forego information provided by traditional media for consumer products and rely on user-generated opinions in their determination of product decisions.

Even within the travel industry, business models have come along that shed light on some of the possible underlying mechanisms involved in evaluating information. In March of 2009, a travel review and opinion aggregator named TravelPost was launched to provide users a seemingly universal view of the sector by compiling the review information from hundreds of top travel websites. Included in these sites are over one million guest reviews from nearly

150,000 lodging locations worldwide.⁶ At first look, the notion of excessive amounts of information becomes evident, but the TravelPost site adds some new facets to their search that the other sites have not yet offered. With TravelPost's filtering system, users can set search criteria to identify reviews written by persons that they perceive to be similar to themselves or their situation.⁷ Searches can be conducted to find reviews that were created by persons who match certain age, lifestyle, and expense criteria. Another aspect the aggregator offers is the ability to exclude reviews from certain sites that users feel are untrustworthy.⁸ Any website deemed such will not be used in compiling reviews for the user. This website offers unique Internet search capabilities that make it an ideal engine from which to compile information for use in travel decision-making processes.

Even with consumers' ability to seek information from online sources, travel traditional media have remained strong in this regard. Although overall magazine and newspaper readership has dropped nearly 40% this decade, the travel segment of the industry has remained quite steady.⁹ An example of this strength can be found in the average circulation base of magazines like *Conde Nast Traveler*, which has enjoyed five-percent growth in its circulation base since 2005 and has maintained an average readership of over three million adults.¹⁰ Additionally, magazines were considered the most influential medium for travel services while newspapers were the most influential for local attractions. Although newspapers are found to be strong authorities in aiding local attraction decisions, travel books were considered two and a half times more influential than newspapers overall.¹¹

While traditional media remain somewhat steady in the travel sector, consumers' collection of travel-specific information online has increased and ultimately changed the way in which travelers conduct their decision-making processes. A recent survey found that online

research was indicated as the most influential source for travel planning, with over 75% of respondents indicating the information collecting method as influential or very influential.¹² Industry leaders in the travel sector have already recognized the power of online sources and have greatly factored this channel into their marketing plans. Nearly 40% of these industry leaders said they expect the continued growth of the online travel sites to be their key opportunity in 2010.¹³ Second to online research was recommendations from friends. These recommendations not only entail word-of-mouth personal contact, but also can be conducted via online services. Social media and networking sites like Facebook, Twitter and Flickr allow users to share information, photos, and personal descriptions with immediacy and ease. Recommendations from friends were considered more influential to respondents between the ages of 18-35 (74%) than they were for travelers over the age of 55 (47%).¹⁴ Also speaking to the differences in age groups is a recent survey that reported that of their sample, over 35% of 18-24 year olds reported they used social media in their travel planning.¹⁵ The survey also found that nearly one-quarter of respondents used social media in their planning. Based on these findings, it is not necessarily surprising then that 20% of travel industry respondents indicated that they were undertaking some social media initiatives in 2009.¹⁶ This same group of respondents also indicated that 60% of them planned to engage in social media connections in 2010.¹⁷ A number of factors could be influencing this, but these results are certainly intriguing when trying to understand the methods in which travelers collect trip-based information and how that may be changed in the future.

The travel industry, although stable and effective at promoting business interests in traditional media, has shifted some of its marketing focus to online social media. Another Nielsen study conducted by its online division found that the travel industry increased their

advertising expenditures on social networking sites by 364% in the past year.¹⁸ A further indication of the travel industry's recognition of social networking sites as a favorable medium is that total online advertising spending for the sector decreased by 11% during the same time frame. Of the 13 major industries included in the Nielsen study, only the Entertainment industry had a year-to-year percentage increase in ad expenditures greater than the travel industry.

With industries, including the travel industry, recognizing online social networks as viable options for the placement of their marketing dollars, it appears a greater amount of emphasis will be placed on this aspect in a marketing mix. As Alex Burmaster, the Online Communications Director for The Nielsen Company, wonders, "could it be the social media revolution has forced advertisers to use a more realistic form of messaging grounded in the experience of consumers rather than the lofty ideals of the advertisers?"¹⁹ In a market such as the travel sector, this way of thinking may be even heightened considering that much of the allure of travel is found in the experience of the trip and rarely, if ever, on tangible products or returns. Because of the experiential nature of tourism, it is foreseeable that branded travel advertising could have a lessened effect when positioned against opinions from others online.

Lastly, evidence supports the notion that consumers trust consumer reviews online more than they do advertising.²⁰ This can have major ramifications on the travel advertising industry, as clients will seek to engage with travelers in non-traditional ways. In doing so, advertisers will have to grasp the differences between forms of information delivery while also discovering the ways in which consumers have determined the usefulness of these newer forms of information. To better understand the mechanisms underlying this shift, this essay will seek to uncover some driving factors and consumer preferences that have shifted how travelers obtain information used in decision-making processes.

Possible theoretical models

A commonly held and supported belief in marketing is that word-of-mouth (WOM) referrals are one of, if not the most, influential sources of product-related information.²¹ Recent studies have investigated whether WOM information positively impacts product sales, with the studies returning mixed results.²² Early studies of word-of-mouth and referential information found that this method of data collection was very influential in shaping consumers' attitudes and behaviors regarding physician selection, automotive choice, and grocery shopping.²³ More recently, scholars have taken to the idea of "eWOM," or electronic word-of-mouth.²⁴ Recent studies of eWOM found that source credibility, in addition to argument strength and confirmation of a prior belief, greatly influenced online WOM credibility.²⁵

In online environments, web users rely on cues such as the appearance of the website and the credentials of the site's author to determine if the information on the site is believable.²⁶ Even though author credentials are important, the persuasiveness of the recommendation source actually does not differ between reviews on a retailer website versus those on an independent third-party site.²⁷ This suggests that the user determines the quality of the information outside of the context where the information is placed, and in honing these abilities, people have become quite adept at distinguishing which information on the Internet is believable.²⁸ This sense or ability has somewhat devalued the importance of publicly established or industry-supported expertise in the Internet community, as users are identifying their own experts based upon the perceived quality of information they encounter. Along with trustworthiness, scholars still believe expertise is a key component of credibility, although this commonly relates more to online news and not necessarily product reviews.²⁹ As seems to be the case with online

information, the determination of expertise relies primarily on the perception that the source is providing “correct knowledge.”³⁰

Although various studies determine media credibility in terms of the medium or the vehicle,³¹ setting out to define advertising or basic online information based on the media credibility model has not been as readily undertaken. Though important aspects of credibility remain the same across different media, the slight variations can alter how the idea of credibility affects the measurement of the concept. In an online setting, past studies have recommended that media credibility can be gauged across four measures: believability, accuracy, lack of bias, and depth of knowledge.³² This definition of credibility also works beyond media credibility as it can relate to overall source credibility, but with one included measure.

When evaluating the potential utility of information, individuals evaluate how trustworthy the source of the information is. This development of the source credibility model stems from the social psychology work of Hovland and colleagues.³³ The model holds that two factors, expertise and trustworthiness, are the main components determining the effectiveness of the source.³⁴ The determination of these qualities lies solely in the receiver of the message, as they decide if the provider seems to be accurate in their assessments and if the message source is forthright in offering accurate assertions. Placing the model in a personal word-of-mouth context, this can mean the evaluation of a friend’s knowledge of a subject and the general believability of their message will determine its effectiveness, and in many cases, persuasiveness. In an online context, however, these same attributes hold, but determination of these attributes is seemingly more difficult due to the lack of familiarity one would acquire in a personal meeting. In fact, there are several reasons that checking the credibility of online information and sources is difficult, such as the lack of access to competing information or the

inability to discover authors' possible commercial interests.³⁵ As such, source credibility of the information source online is important to the users' assessment and use of the information.

Another aspect that coexists with the source credibility model is the source attractiveness model. This model contends that the effectiveness of a message lies in how people perceive the source to be likeable, familiar and similar to themselves, an identification factor that is also a component of some dual-process models.³⁶ Likability in most senses pertains to the fondness for the source based on factors such as behavior or appearance; familiarity has been defined as the knowledge obtained of the source through experience or encounters; and similarity is the assumed or perceived resemblance of the source to the message receiver. These three issues, though important to the source attractiveness model, are somewhat confounded by the use of online communication tools and social media. Of the factors, similarity is arguably the most subjective assessment and as such can be the least difficult (but also the least accurate) to perform in an online environment. This can be an evaluation that lacks support and may be based on a somewhat skewed sense of self.³⁷ Although the source credibility model and source attractiveness model exist as separate systems, these models have been grouped together in previous studies to create an overall source model due to their relatable themes.³⁸

Because of the inability to make face-to-face personal contact, individuals make personal assessments to further support or refute credibility. One such trait that is superficially deduced is how much an individual online is similar to the information seeker.³⁹ This identification component allows the user to more readily relate reviews to their personal circumstance to determine if the information contained in a review will be likely to coincide with their own eventual opinions. In an interpersonal online context, such as that of a social networking site, this factor is important to the overall determination of credibility.

The source credibility aspect aims to provide an explanation as to why and how impactful tourists are finding travel review and opinion websites and if the recommendations on these sites are considered in their final decisions and actions. Travel advertising can also be viewed in a similar context to see if the rise of online information and social networking sites has created a perception that advertising is more or less credible than these sources of information. The TravelPost aggregator speaks directly to the notions of media credibility and source credibility as the two search features unique to the site, demographic selection and blacklisting, match perfectly with the concepts of identification (or familiarity) and trustworthiness. By selecting demographics that match one's own, users are attempting to get reviews from others who they perceive could be accounting for options and offerings that they themselves consider of more importance. As such, they are identifying with that poster and as such hold their opinions to be more valid than someone who they perceive to be more dissimilar to them. The concept of trust is of interest also as it is fueled by the perception that the information provided by a certain poster or website is dishonest. This could be caused by a number of assumptions, such as dishonesty by a reviewer hiding behind relative anonymity or ulterior business motives on behalf of the poster. Not only is it interesting to consider these concepts in this realm of social media, but it is intriguing to contemplate how these concepts relate to social networking sites, wherein anonymity is reduced and identification with contacts would seem to be increased.

What the data suggest

From this research, some initial suppositions can be made regarding the questions I posed at the beginning of the essay. In regards to comfort with social networking sites and online consumer shopping, it appears that some level of comfort purchasing from online consumer sites would encourage one to take advice from an online travel site. The more secure one feels in the transaction, whether the capital exchanged is money or information, the more likely she will be to feel secure in subsequent transactions. As noted above, consumers feel comfortable with feedback from others who have had some experience with a product (as evidenced by products with online reviews being twice as likely to be purchased than those that do not). Though more information or further study into this may be needed to fully support this, it seems that the more a person is comfortable with online consumer sites and connecting with others online, the more likely they would be to take advice about travel from an unknown other online. As their experience with these media increases, peoples' trust of opinion posters overall will likely increase, instilling a sense of comfort in not only searching for, but also collecting travel information from unknown parties.

In conjunction with level of comfort with social media, age also seems to be a factor in people's willingness to base travel decisions on consumer recommendations. The *Content and User Experience* survey found that 35% of 18-24 year olds used social media to help with travel decisions.⁴⁰ Survey-wide, those who reported using social media in travel decisions was only 23%, an indication that younger people are seeking out social media to find information on travel. Although no indication of why they are seeking out these sources (e.g. not familiar with travel in general, can't afford other sources, etc.) is presented, it is important to note that one can

assume that if they find these sources useful, they will continue to utilize the information and possibly add to the databases.

As the information about TravelPost suggests, perceived similarity to the individual posting a travel review seems to be important to the ultimate utilization of the information. In review of the source models, this identification factor is one of the components that increases the persuasiveness of a message from the source.⁴¹ The validity of this likely holds true in the travel review realm also, which makes the concepts of media credibility and source credibility useful models when investigating possible mechanisms that can help explain why certain reviews, or more accurately, certain sources providing reviews, influence more than others. Understanding how these reviews are influential can aid in comprehending what motivates individuals to select certain pieces of information.

In terms of the use of advertising in the evolving media environment for travel information, it is difficult to forecast what may happen to the industry overall. The travel sector has already indicated that they plan to advertise more on new media, and in particular social networks, in 2010.⁴² The online advertising practices of the travel industry seem to have some indication of an upward trajectory in the coming years, but that does not necessarily answer what will happen to traditional media advertising in this sector. One would assume that displacement could occur as advertising dollars are shifted from traditional to online, but then again that does not answer whether the traditional media advertising will be influential or even used. Ironically, the marketers may be making the decision for travelers by providing far fewer ads in traditional media. It would be assumed that this would reduce the impact of this form of advertising or only be used for specific destinations that may only fare well in a traditional media environment. Based on the information collected, it seems that advertising in these social media arenas may be

the way the industry is moving, and as such, as consumers, there is little we can do to alter this change. As consumers have taken to the use of social media in various levels in recent years, the impact and effectiveness in relaying information provided by these sites introduced a unique model that has marketers re-evaluating how travel is sold. For those of us watching these developments, it seems like it could be quite a trip.

Although investigating how people make travel choices seems to be a somewhat niche area, the financial impact of these choices worldwide is quite staggering. In 2008, international tourism receipts tallied \$944 billion, making travel one of the most lucrative industries worldwide.⁴³ Understanding how and why people feel they can trust online sources (and how they use that information in their decision-making processes) is a practice that could help spur growth in the industry in the range of billions of dollars. Future research should go into further investigation of the mechanisms behind various aspects of tourism social media and how these media can be better utilized to fulfill the needs of the traveling public. With the information created by studies such as those suggested, travel marketers can better connect with travelers to produce better experiences for tourists all the way from computer boot up to plane touch down.

NOTES:

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