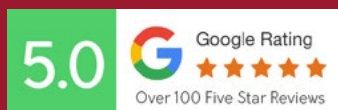




A CONSUMER'S PERCEPTION OF ONLINE TRAVEL AGENTS (OTA'S)

Survey on the power and awareness of
large OTAs' brands.





Chris Torres
Founder & Director

DO OTA'S SUFFER FROM BRAND BLINDNESS?

While those of us in the industry talk at length about Online Travel Agents (OTAs), are they well known by the general public they target? With all the investment they have received and the millions of dollars at their disposal, have they actually done a good job in putting their brands into the minds of travellers and consumers? Does that even matter?

These questions came up when I was talking with family and friends at a recent get-together. I discovered that most have never heard of any of the big OTAs I mentioned, with the exception of a select few brands. Pretty much everyone I asked had heard of Tripadvisor, Airbnb, and Booking.com, but when I mentioned Viator, Get Your Guide, and a few others, they stared at me blankly...

This got me thinking: do OTAs do a good job at raising their brand profile or have they been so focused on just getting bookings through the likes of Google Ads that they've lost sight of the path to growing a successful brand: by becoming a household name.

Apple, Virgin, Google... all of these companies are household names for various reasons because they focus on the customer and experience, not the products.

For me, Airbnb is the only brand within our sector that has truly built its brand awareness without relying heavily on the likes of Google. They may not be at the top of people's psyche (as you will shortly see) but they have 'got it right' in terms of being on our mind when it comes to booking alternative accommodation. No one

would search for an Airbnb accommodation on Google, but they would ‘Airbnb it’ directly on their app or website. They have arguably become the ‘Google’ of that sector. The same can not be said for likes of Tripadvisor or Booking.com. Far too many customers find products on these platforms after a Google Search.

Airbnb Experiences, on the other hand, has yet to gain the same momentum as the accommodation side of the brand offering, but I believe its time will come. The accommodation side of the brand took many years (launched August 2008) before they became a household name. That’s 13 years of building a brand and not overly relying on other platforms like Google Ads, Facebook, etc.

This is why I still maintain that eventually Airbnb will ‘WIN’ the OTA battle for tours, activities, and experiences. The only potential spanner in the works might be a brand like Amazon but this is a long way off.

Consumers gravitate towards brands that focus on the consumer and not the products themselves. Airbnb has effectively built their brand tribe... and will continue to do so.

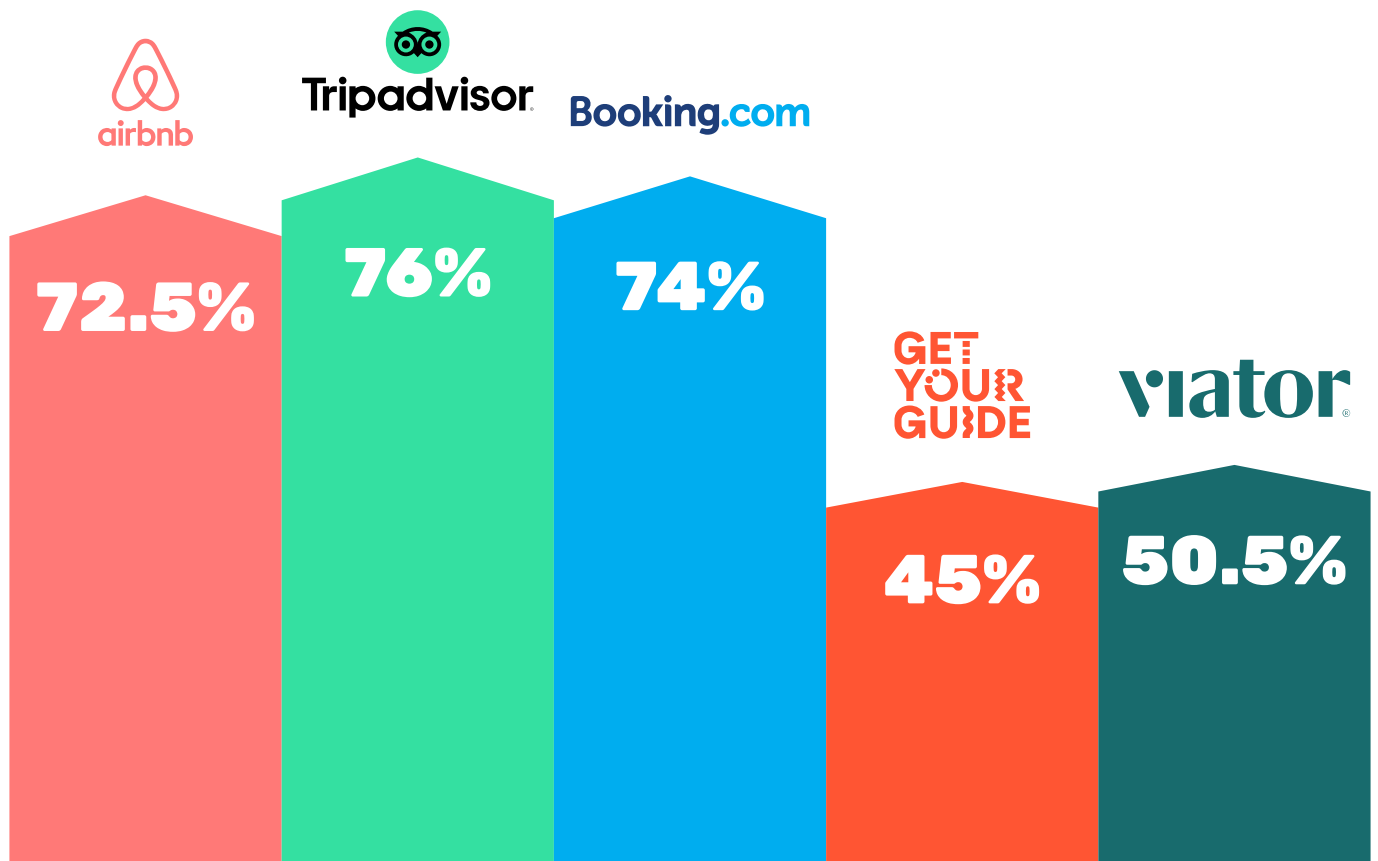
CONSUMERS’ PERCEPTION OF OTA’S

Because we feel data should always lead the opinions and strategies at TMA, we conducted a survey (full version available to [download for free here](#)), asking consumers from across the US and UK if they know of any of the ‘big’ OTAs in our sector and what first springs to mind about each brand. It makes for interesting reading.

United States

Have you heard of any of the following brands?

We first wanted to determine if the brand was known by the consumers who conducted the survey within the **United States**.



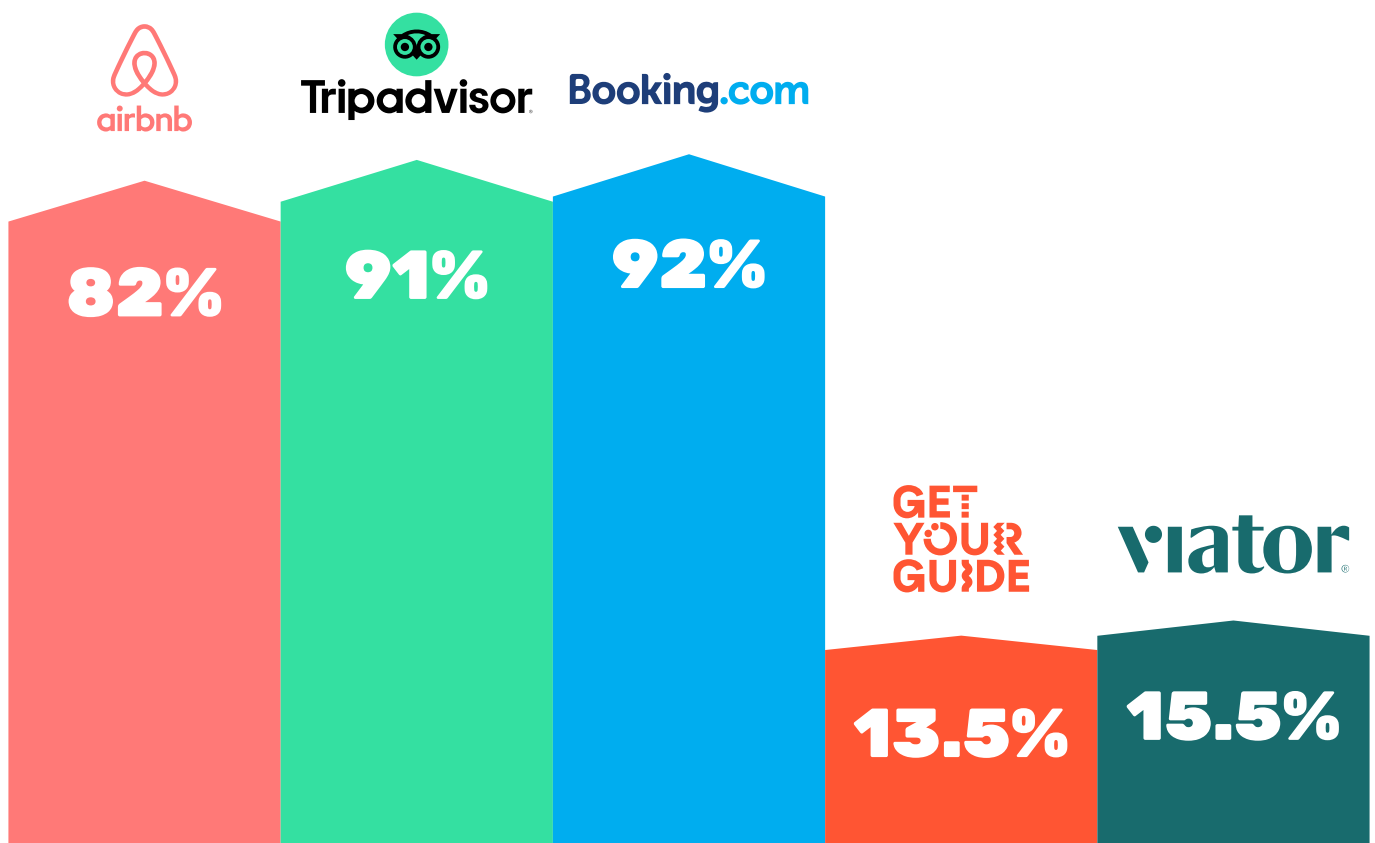
Tripadvisor is the best-known OTA from the above list, but is closely followed by Booking.com and Airbnb. Get Your Guide and Viator are way behind in consumers' minds in this destination.

Survey of 400 consumers across the US aged between 25-54+

United Kingdom

Have you heard of any of the following brands?

We first wanted to determine if the brand was known by the consumers who conducted the survey within the **United Kingdom**.

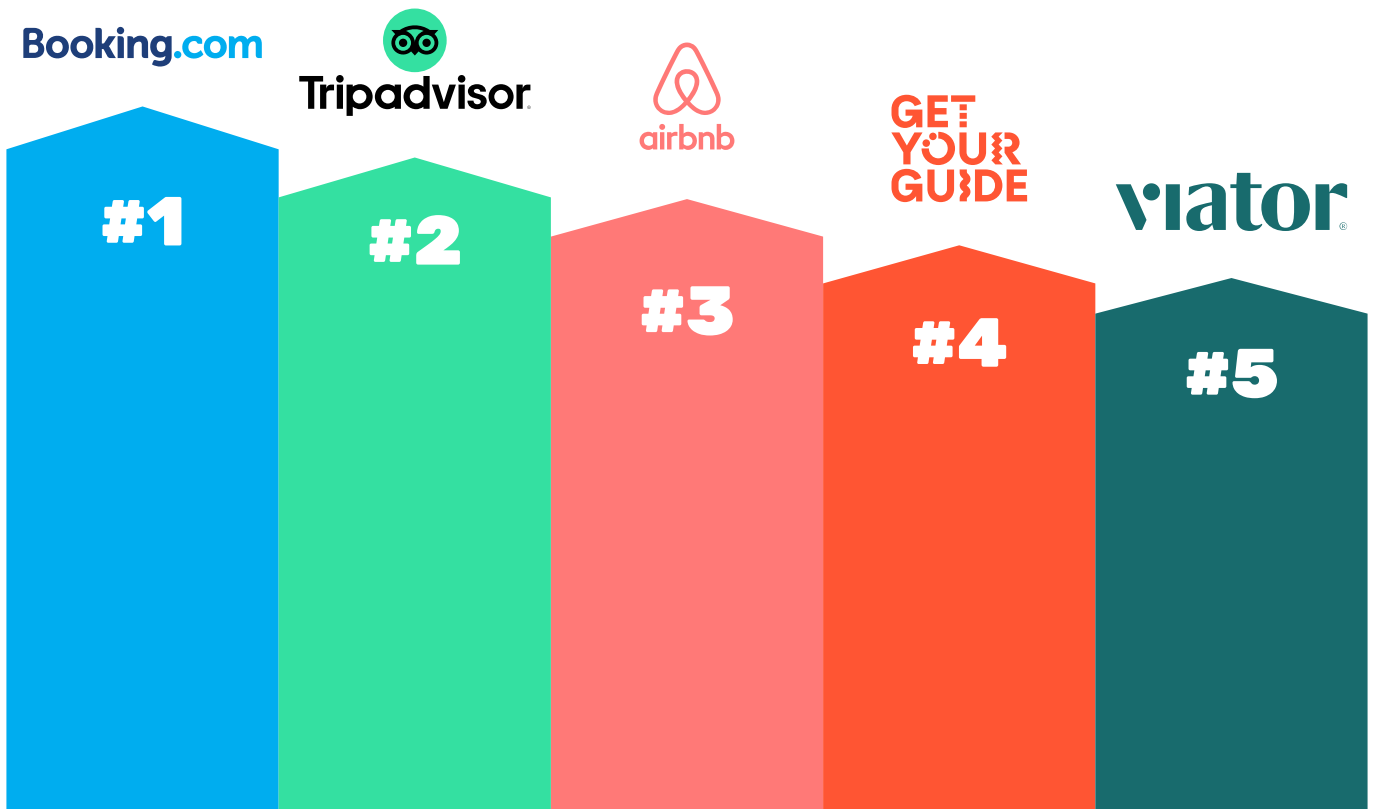


Booking.com is the best-known OTA from the above list, but is closely followed by Tripadvisor and Airbnb. Get Your Guide and Viator have a very small brand footprint in this destination.

United States

Please select the order of the brands you have heard/seen of the most

Next, in the **United States** we wanted to determine out of all the brands they have heard of which ones stand out the most in order of first to last



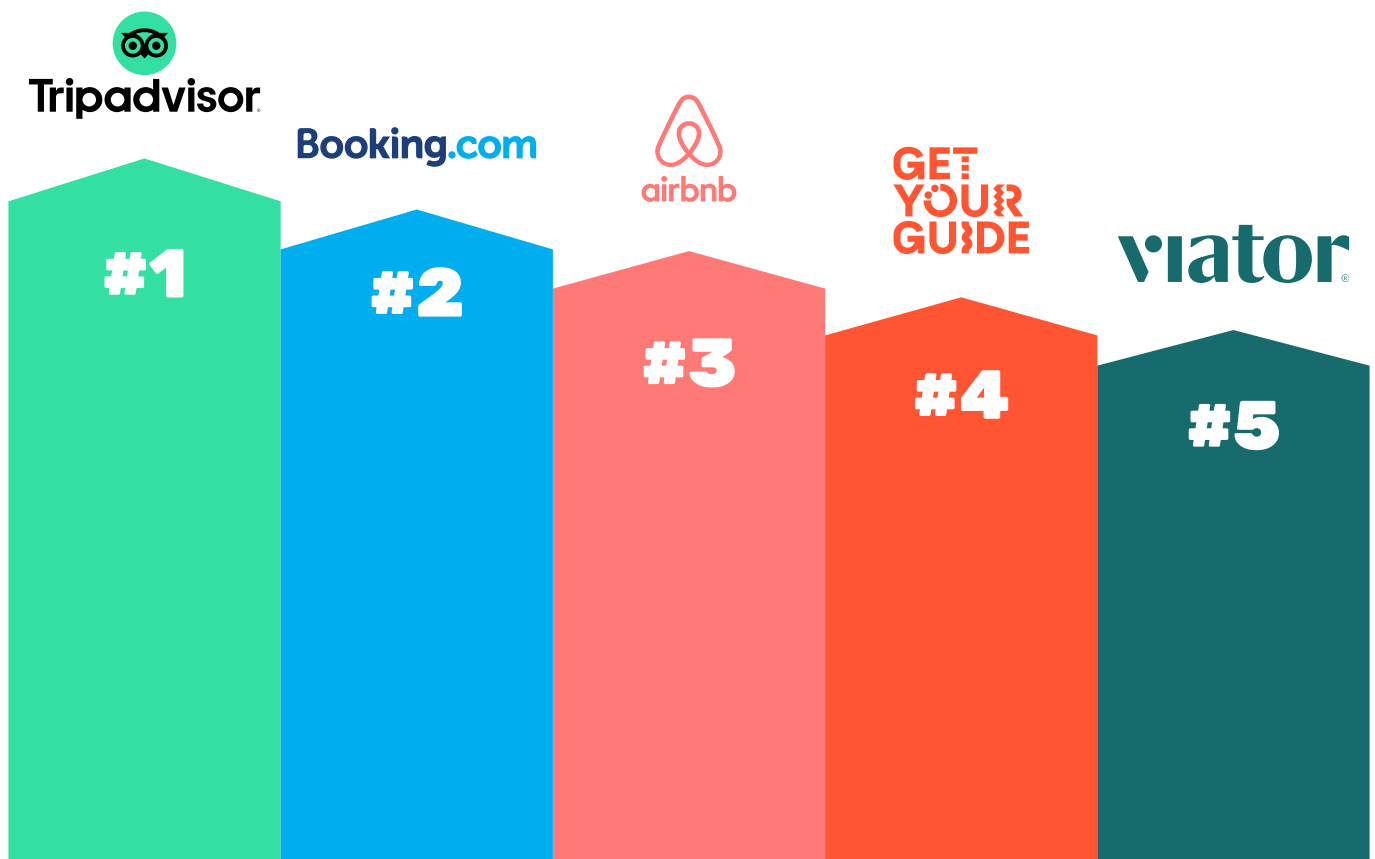
Booking.com comes out on top, highlighting they are doing a better job of trying to raise awareness of their brand. But, interestingly, Get Your Guide, the lowest in terms of brand awareness in this destination, is making a small gain here too.

Survey of 400 consumers across the US aged between 25-54+

United Kingdom

Please select the order of the brands you have heard/seen of the most

Next, in the **United Kingdom** we wanted to determine out of all the brands they have heard of which ones stand out the most in order of first to last.



Tripadvisor comes out on top, highlighting they are doing a better job of trying to raise awareness of their brand. But, interestingly, Get Your Guide, the lowest in terms of brand awareness in this destination, is making a small gain here too.

Survey of 400 consumers across the UK aged between 25-54+

United States

Choose up to 3 things that come to mind when you think of Airbnb

Brand awareness is all well and good, but do consumers actually know what a particular OTA is for? We asked the consumers to select their top 3 things that come to mind about Airbnb in the **United States**.



The number one perception of Airbnb is to search and book accommodation, so no surprises there. But it looks like they are doing an excellent job of growing the experience part of the brand.

Survey of 400 consumers across the US aged between 25-54+

United Kingdom

Choose up to 3 things that come to mind when you think of Airbnb

Brand awareness is all well and good, but do consumers actually know what a particular OTA is for? We asked the consumers to select their top 3 things that come to mind about Airbnb in the **United Kingdom**.

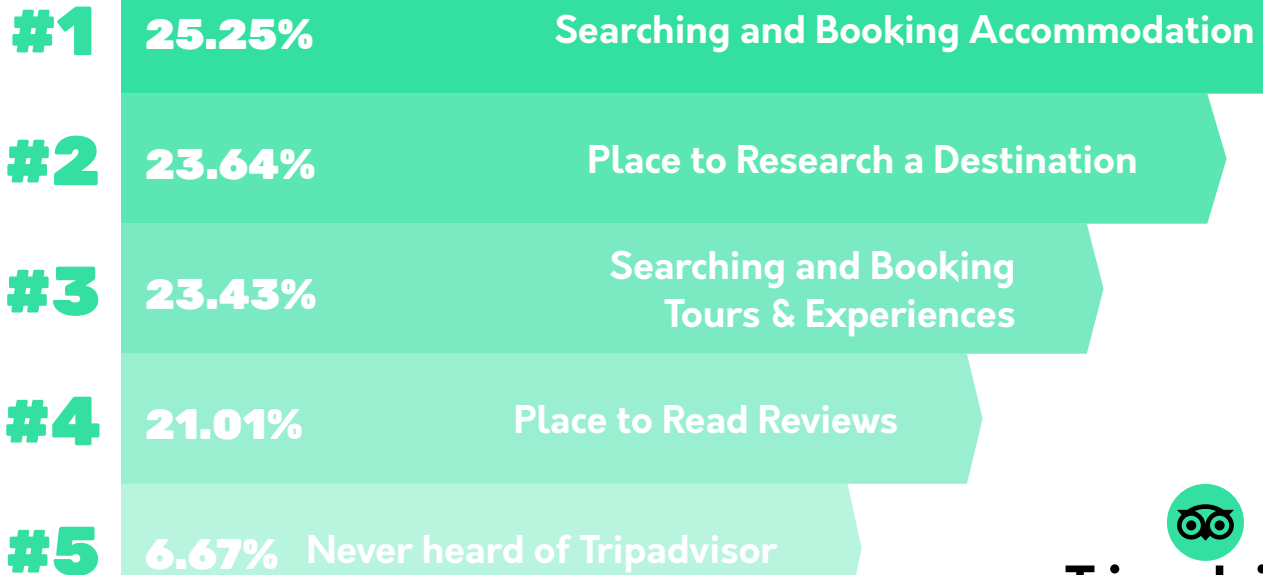


The number one perception of Airbnb is to search and book accommodation, so no surprises there, but reviews and researching a destination take positions 2 and 3. Unlike the US, booking experiences on Airbnb is less known in the UK.

United States

Choose up to 3 things that come to mind when you think of Tripadvisor

Brand awareness is all well and good, but do consumers actually know what a particular OTA is for? We asked the consumers to select their top 3 things that come to mind about Tripadvisor in the **United States**.



The number one perception of Tripadvisor is to search and book accommodation, so no surprises there. But researching a destination just edges ahead of booking tours and experiences in the United States. Surprisingly, reviews — what Tripadvisor is famous for — sits in 4th place, so perceptions are changing.

Survey of 400 consumers across the US aged between 25-54+

United Kingdom

Choose up to 3 things that come to mind when you think of Tripadvisor

Brand awareness is all well and good, but do consumers actually know what a particular OTA is for? We asked the consumers to select their top 3 things that come to mind about Tripadvisor in the **United Kingdom**.



Unlike the US market, in the United Kingdom consumers perception is that Tripadvisor is a place, predominantly, for reading reviews. Booking accommodation and researching a destination take spots 2 and 3, with tours and experiences as the least known parts of Tripadvisor's offering in the UK.

Survey of 400 consumers across the UK aged between 25-54+

United States

Choose up to 3 things that come to mind when you think of Booking.com

Brand awareness is all well and good, but do consumers actually know what a particular OTA is for? We asked the consumers to select their top 3 things that come to mind about Booking.com in the **United States**.



The number one perception of Booking.com is that it's used to search and book accommodation – so, no surprises there. Booking tours and experiences comes in a close second; so, in the United States, booking experiences is nearly as popular as booking accommodation. A large number of consumers use this platform as a review resource too.

Survey of 400 consumers across the US aged between 25-54+

United Kingdom

Choose up to 3 things that come to mind when you think of Booking.com

Brand awareness is all well and good, but do consumers actually know what a particular OTA is for? We asked the consumers to select their top 3 things that come to mind about Booking.com in the **United Kingdom**.



Booking.com

Booking.com is better known in the United Kingdom and the number one reason people use it is to search and book accommodation. Experiences sits in second place, so in the UK Booking.com is also becoming known for this. However, accommodations are still out in front. A large number of consumers use this platform as a review resource too.

Survey of 400 consumers across the UK aged between 25-54+

United States

Choose up to 3 things that come to mind when you think of Get Your Guide

Brand awareness is all well and good, but do consumers actually know what a particular OTA is for? We asked the consumers to select their top 3 things that come to mind about Get Your Guide in the **United States**.



It is evident that there is something wrong with Get Your Guide’s brand awareness and messaging in the United States. Researching a destination tops booking and experience, and the consumers surveyed think they can book accommodation – something this platform does not cater for!

Survey of 400 consumers across the US aged between 25-54+

United Kingdom

Choose up to 3 things that come to mind when you think of Get Your Guide

Brand awareness is all well and good, but do consumers actually know what a particular OTA is for? We asked the consumers to select their top 3 things that come to mind about Get Your Guide in the **United Kingdom**.



**GET
YOUR
GUIDE**

Get Your Guides brand awareness in the UK is very small, with nearly 30% of consumers having never even heard of it. For those who do know the brand, it is a place for reviews before booking an experience. Booking an accommodation, something the platform does not cater for, is very high at 14.33%. Something not quite right here.

Survey of 400 consumers across the UK aged between 25-54+

United States

Choose up to 3 things that come to mind when you think of Viator

Brand awareness is all well and good, but do consumers actually know what a particular OTA is for? We asked the consumers to select their top 3 things that come to mind about Viator in the **United States**.



The number one perception of Viator is that it's used to search and book experiences. No surprises there. But searching and booking accommodation is a close second – something Viator does not offer. Has the association with Tripadvisor somehow diluted the Viator brand? A large number of US consumers have yet to hear about the brand.

Survey of 400 consumers across the US aged between 25-54+

United Kingdom

Choose up to 3 things that come to mind when you think of Viator

Brand awareness is all well and good, but do consumers actually know what a particular OTA is for? We asked the consumers to select their top 3 things that come to mind about Viator in the **United Kingdom**.



With nearly half of those surveyed yet to hear of this brand, Viator is clearly yet to break into the United Kingdom. For those who do know it, Viator is jointly known for booking experiences and a place to research a destination.

WHAT ISSUES DO OTAS HAVE?

(AND WHAT ARE THE SOLUTIONS?)

Going by the findings above, I still find it surprising that with the resources these OTAs have, consumers have little to no knowledge of the vast majority of them. Or, if they do, they know them for one area, such as reviews on Tripadvisor for the UK market.

They all focus their efforts and investor cash on Google Ads but all they are doing is feeding an already huge monster that has their own aspirations in this space. To truly stand on their own feet, becoming the type of brand Airbnb has become, they must refocus how they brand and market themselves, and they must do this quickly! Most have had two years of a pandemic to implement these changes but I think it is safe to say that the majority of OTAs have been stagnant in their efforts.

Where is the innovation from the big OTAs? Who made the decision to focus most of the online marketing on Google Ads? Why are some not a household name after all these years? If I was an investor, these are the questions I would be demanding answers to.

Get Your Guide's brand perception may also be confusing. Are they an OTA or an operator with their Get Your Guide Originals brand. Personally, I think consumers are finding it hard to work out what they are.

Shane Whaley at Tourpreneur highlighted that [Get Your Guide released a series of ads](#) on NYC TV. The ads are nice, but this ad campaign is a drop in the ocean compared to what they need to do. It is likely that these ads are probably either a

test to see how effective they can be, or just a way to appease investors... or both... But at least it's a step in the right direction. Will it be successful? Time will tell, but it will take a vast amount of money, more years of better brand development, and more investment to make it work... And with Airbnb so ahead of the game in terms of brand equity... it may be a little too late in the game for some of the other OTAs.

WHY YOU NEED TO BUILD A DIRECT RELATIONSHIP WITH YOUR CUSTOMERS

Building your own brand is vital to the long term success of any business, whether you are a small, one-person company or a multi-million dollar business. Without brand equity you are never going to gain the sort of traction that you should, or that is possible. This is why I am so surprised that most OTAs miss the mark in this area. They may have amazing tech, a massive library of products, shit-tons of money, and they even 'own' your customers' data. But do they truly own the customer's hearts?

Building a brand is everything. Without it, you are nothing more than a platform or brand that exists for the sake of existing, not because the consumer really wants you to exist.

If you build that brand relationship directly then you stand a better chance of building your own tribe of fans and followers that will help spread the word about your brand.

Think about what Airbnb has done. When you think back, remembering a place you stayed at, most of us will not think 'That was a great accommodation that our host Jill had in Scotland' but you will say 'That Airbnb we stayed at last summer was amazing'. When a brand becomes synonymous with the product or service... then it has won.

The rest are just playing catch up, and from what I'm seeing, some are doing a pretty poor job at it.

ABOUT CHRIS TORRES



Chris is an author, podcaster, and brand & digital tourism expert with over 26 years' industry experience. Chris speaks at many tourism events worldwide, offering his advice and guidance on how travel, tourism, and destination businesses can gain brand recognition and increase bookings.

Chris has focused his business, the Tourism Marketing Agency, on tour operator marketing with over 90% of his client base coming from outside the UK, working with some of the biggest players in the industry.

Chris is the author of the best-selling marketing book, *How to Turn your Online Lookers into Bookers*, a 400-page book full of practical marketing advice dedicated to the tours and activities sector.

Chris also produces a video advice series called *The Digital Tourism Show* which you can watch on his [Facebook Group](#), [YouTube channel](#), or listen via [Google or Apple podcasts](#).

Chris has won numerous awards over the years, such as the Best Tourism Website, Best Digital Agency, and the Scottish SME's Businessman of the Year 2018.

ABOUT THE TOURISM MARKETING AGENCY

The Tourism Marketing Agency (TMA) is an international digital tourism agency that has been in operation for 13 years. We have partnered with many worldwide tourism brands, such as Overland Ireland, Asheville Wellness Tours, and Gray Line — the oldest and largest sightseeing company in the world.

With over 90% of our client base coming from outside the UK, where we are based, we have gained great insight and knowledge of international markets. This gives TMA unique insight into how destination businesses should market themselves to attract international travellers.

We do not have clients or customers; we have partners with whom we wish to build long-lasting relationships, helping you through the many challenges of promoting a business online. We believe in strong communication as the backbone of this successful relationship.

We wish to turn your Lookers into Bookers, and we have the experience and expertise to make this happen.

“TMA have been greatly supportive from start to finish, especially during the Covid-19 crisis, helping to maintain our marketing needs during this time. They respond quickly with every question we have and assists with new ideas to grow our business. We are extremely thankful and hope to work with the team for many years to come.

Thanks TMA!” **Nicola Holland - Horizon Sail**

SURVEY DEMOGRAPHICS

We asked 400 consumers, split between the US and UK.

Age

25-34	31.25%
35-44	39.25%
45-54	14.75%
>54	14.75%

Gender

Male	52.25%
Female	47.75%

Ethnicity

Arab	0.50%
Asian	4.75%
Black	5.25%
Hispanic	2.00%
Latino	0.50%
White	83.75%
Multiracial	1.00%
Other	1.00%
Prefer not to say	1.25%

Education

Middle school	6.50%
High school	19.00%
Vocational/Technical college	18.00%
University	29.00%
Post-graduate	27.50%

Marital Status

Single	22.50%
Married	54.50%
Divorced	5.25%
Living with partner	13.75%
Widowed	1.75%
Separated	1.75%
Prefer not to say	0.50%
Single	22.50%

Children

None	30.50%
1	25.00%
2	31.00%
3	8.25%
4	2.50%
5	1.25%
6 or more	0.75%
Prefer not to say	0.75%

Income

Under \$25,000	15.25%
Between \$25,000 and \$49,999	13.00%
Between \$50,000 and \$74,999	23.25%
Between \$75,000 and \$99,999	13.50%
Between \$100,000 and \$124,999	10.25%
Between \$125,000 and \$149,999	8.50%
\$150,000 or more	12.25%
Prefer not to say	4.00%

Employment Status

Employed for wages	59.00%
Self-employed	10.50%
Out of work and looking for work	6.75%
Out of work but not currently looking for work	0.75%
Homemaker	8.00%
Student	3.00%
Military	0.25%
Retired	6.00%
Unable to work	3.25%
Other	2.50%

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They respond quickly with every question we have and assists with new ideas to grow our business. We are extremely thankful and hope to work with the team for many years to come. Thanks TMA!”

Nicola Holland - Horizon Sail



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