



Consumer Technographics®
MAKING LEADERS SUCCESSFUL EVERY DAY

European Technographics® Retail, Customer Experience, And Travel Online Survey, Q3 2011

EUROPEAN TECHNOGRAPHICS

Forrester fielded this online survey in June and July 2011. We surveyed 13,063 consumers across France, Germany, Italy, the Netherlands, Spain, Sweden, and the UK.

The purpose of this study was to analyze broad patterns in technology and attitudes among online consumers in Europe. While the survey instrument focuses mostly on the online behaviors of connected consumers, it also includes questions about general technology attitudes, retail and travel. The topic areas in this survey include (but are not limited to):

- Internet access and home access type.
- Retail and e-commerce.
- Generic consumer attitudes towards shopping and online shopping.
- Payment methods.
- Customer journey
- Online retail websites.
- Customer Service.
- Mobile commerce.
- Customer ratings/reviews Web sites.
- Leisure and business travel.
- Research and buying travel online.
- Use of mobile phone for travel related data services.
- Social Technographics

To help you perform custom analyses and profiling, you may segment consumers by their responses to any of the demographic questions. In addition, you have access to a set of variables that capture the Technographics segments that Forrester has used since 1997 to predict consumers' adoption of technology and their ongoing use of it.

For data subscribers, please contact the Technographics Team with any questions regarding the use of Forrester's European Technographics Retail, Customer Experience, and Travel Q3 2011 Survey or custom data analyses. The Technographics Team can be reached at ConsumerDataAdvisor@forrester.com.

For non-data subscribers, please contact the Technographics Business Development Team with any questions regarding the use of this data or custom data projects at data@forrester.com.

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INTRODUCTION

Welcome to this survey conducted by Ipsos MORI .The survey is about a range of topics including travel, shopping and the Internet. It will take around 20 minutes of your time to complete.

All data will remain confidential. Your attitudes and opinions are very important to us and we would be grateful if you could take the time to fill in our survey.

ASK ALL

S1

What is your gender? (SP)

1. Male
2. Female

S2

What is your date of birth (year and month)?

(RECORD EXACT AGE, NUMERIC ALLOW 16+)

Q01

How often do you go online on a computer (desktop, laptop, netbook or tablet)? This includes access to the Internet from home, work, or elsewhere (including weekdays and weekends).

Please select one answer only (SP)

1. Several times a day
2. About once a day
3. Several times per week
4. About once per week
5. Several times per month
6. About once per month
7. Less often than once per month **(CLOSE)**

RECODE:

Daily = codes 1 and 2

At least Once a Week = codes 3 and 4

Less often than Once a week = codes 5 and 6

ASK ALL

Q02

On average, for how many hours are you actively online per week?

Please select one answer only (SP)

1. Less than 1 hour
2. 1-4 hours
3. 5-9 hours
4. 10-14 hours
5. 15-19 hours
6. 20-24 hours
7. 25-29 hours
8. 30 or more hours
9. Don't know

RECODE:

1-4 hrs = codes 1 and 2

5-19hrs = codes 3, 4 and 5

20 or more hrs = codes 6, 7 and 8

DK = code 9

Q03

How long have you been going online?

Please select one answer only (SP)

1. Less than 6 months
2. About 1 year
3. About 2 years
4. About 3 years
5. About 4 to 6 years
6. About 7 to 9 years
7. About 10 to 12 years
8. 13 years or more
9. Don't know

Q04

What kind of Internet connection do you usually use at home?

Please select one answer only (SP)

For further information, please place your cursor over the coloured text

1. An ordinary telephone line (Dial-Up/Narrowband)
2. ISDN (i.e. not broadband)
3. Cable (broadband)
4. ADSL (broadband)
5. Another fast connection (e.g. Powerline, LAN)
6. **Mobile broadband** (that we use as our main connection at home)
7. A broadband connection, but I don't know which kind
8. Don't know
9. Don't have Internet connection at home

ASK ALL

Q05

How strongly do you agree or disagree with each of the following statements about shopping in general, where 5 means you strongly agree and 1 means you strongly disagree?

Please select one answer per row (SP per row)

RANDOMISE ROWS

ROWS

1. I like to shop around before making a purchase
2. Price is more important to me than brand names
3. I am influenced by what's new and in fashion
4. When I find a brand I like, I stick to it
5. I would pay more for products that save me time and hassle
6. I often tell my friends about products that interest me
7. I'm always willing to try or do new things
8. I rely a lot on recommendations from friends or family when making purchases
9. Owning the best brand is important to me
10. Advertisement helps me to decide what to buy
11. I would pay more for products consistent with an image I like
12. I love searching for the best deals I can find when shopping for products

COLUMNS

- a. 1- Strongly disagree
- b. 2
- c. 3
- d. 4
- e. 5- Strongly agree
- f. Don't know

Q06

Which, if any of the following types of designer/luxury products have you bought in the past 12 months?

Please select all that apply (MP)

RANDOMISE

1. Designer clothing (e.g. Gucci, Prada)
2. Designer footwear/accessories
3. Watches or clocks (e.g. Rolex)
4. Prestige beauty products (cosmetics, fragrances) (e.g. Lancôme)
5. Fine spirits/wine/gourmet food
6. Fine art or collectibles
7. None of these (SP - ANCHOR)

Q07

Please indicate to what extent you agree with each of the following statements, where 5 means you strongly agree and 1 means you strongly disagree.

Please select one answer per row (SP per row)

ROTATE ROWS ROWS

1. I generally know what I'm looking for when I search for products online
2. I like finding new and interesting products online
3. Search engines help me find the products that I'm looking for online
4. I often rely on word-of-mouth and recommendations to find products online
5. I often buy products after browsing without a specific objective
6. I often research products online and buy them offline
7. I care about my appearance
8. I enjoy meeting new people

COLUMNS

- a. 1 – Strongly disagree
- b. 2
- c. 3
- d. 4
- e. 5 – Strongly agree
- f. Don't know

ASK ALL

Q08 Which one of the following products was your most recent purchase?

Please select one answer only (SP)

1. Books (digital and physical)
2. Music/ Videos/DVDs (e.g., CDs, tapes, vinyl)
3. Digital Music/Video (e.g. MP3, subscription services)
4. Clothing and accessories/Footwear
5. Cosmetics/beauty products
6. Mobile phone (handset without plan)
7. Travel (e.g. hotel reservation; airplane tickets)
8. I never bought any of the products above

ASK ALL

Q09

Still thinking about this most recent purchase, how much did you spend on the product?

Please select one answer only (SP)

Varies by country

1. Less than £25
2. £25 - £50
3. £51- £100
4. £101 - £200
5. Over £200
6. Don't know/don't remember

Q10

SHOW IF CODES 1 TO 7 AT Q8

Which of the following sources were used to research the <INPUT ANSWER FROM Q814> before it was bought?

SHOW IF CODE 8 AT Q8

Still thinking about your most recent purchase, which of the following sources were used to research the product before it was bought?

Please select all answers that apply (MP)

1. TV
2. Retailer brochures/leaflets
3. Price/product comparison website (e.g. Kelkoo)
4. Newspapers
5. Manufacturer's brochures
6. High street shop
7. Family/friends/colleagues
8. Retailer catalogues
9. Magazines
10. The website of a high street shop
11. General online retailer (e.g. Amazon)
12. Online auction site (e.g. eBay)
13. Manufacturer's website
14. Consumer rating and reviews
15. Expert review websites
16. Blogs/newsgroups
17. Search engines
18. Other
19. I did not research this purchase (SP)

Q11

SHOW IF CODES 1 TO 7 AT Q8

Still thinking of the <INPUT ANSWER FROM Q8> you bought recently, which of the following influenced you most when making the purchase?

SHOW IF CODE 8 AT Q8

Still thinking about your most recent purchase, which of the following influenced you most when making this purchase?

Please select all answers that apply (MP)

1. Promotion/special offer
2. Past experience with the brand
3. Image of the brand
4. The features of the product
5. Price
6. Advertising
7. In-store comparison of models
8. Manufacturer's website
9. Retailer's website
10. Consumer ratings and reviews
11. Online forums or blogs
12. Recommendation by friend or family member
13. Expert reviews
14. Comparison shopping site
15. Salesperson in retail store
16. Other
17. None of these (SP)

Q12

SHOW IF CODES 1 TO 7 AT Q8

Through which one of the following was the <INPUT ANSWER FROM Q8> bought?

SHOW IF CODE 8 AT Q8

Still thinking about your most recent purchase, through which one of the following was this product bought?

Please select one answer only (SP)

1. High street shop
2. Catalogue
3. By telephone order
4. The website of a high street shop (e.g. Argos/Tesco)
5. The website of a general online retailer (e.g. Amazon)
6. Manufacturer's website
7. An auction site (e.g. eBay)
8. Other

ASK ALL

Q13

In the past 3 months, have you researched any products/services online?

Please select one answer only (SP)

1. No
2. Yes

ASK ALL

Q14

In the past 3 months, which of the following apply to you?

Please select all that apply (MP)

1. I have ordered products/services online in the past 3 months and paid online **GO TO Q17**
2. I have ordered products/services online in the past 3 months and paid offline **GO TO Q17**
3. I have not bought any products/services online in the past 3 months **[EXCLUSIVE] GO TO Q15**

ASK ALL WHO DIDN'T SHOP ONLINE IN THE PAST THREE MONTHS (ASK ALL CODE 3 AT Q14)

Q15

Why haven't you bought products or services online in the past 3 months?

Please select all that apply (MP)

1. I want to see things in person before I buy them
2. I don't have convenient Internet access
3. I don't want to share my financial information online
4. Shipping costs are too high
5. I prefer to research online and purchase in the store
6. I've heard about others' bad experiences buying online
7. I don't want to wait for products to be delivered
8. I am concerned that my order would not be delivered at all
9. Shopping online is too complicated
10. I'm afraid products will arrive in poor condition
11. I'm afraid I will spend more than I can afford
12. I don't have a credit or debit card
13. I believe I can get a better price from a physical store or catalogue than online
14. I don't want to try anything new
15. I am concerned that returns will be a hassle
16. I am not comfortable with using the Internet
17. I am worried that online stores will send me too many promotional e-mails
18. I cannot speak to a sales assistant in person when I shop online
19. I do not want to register on a shopping website
20. I feel no need to buy products online
21. I didn't know I could buy or order products and services online
22. Other

ASK ALL WHO DIDN'T SHOP ONLINE IN THE PAST THREE MONTHS (ASK ALL CODE 3 AT Q14)

Q16

What would motivate you to start purchasing products or services online?

Please select all that apply (MP)

RANDOMISE

1. Better security for my credit card and/or personal information
2. Better prices
3. Easier to find items
4. Easier to compare products, features and prices
5. Faster delivery
6. Lower shipping prices
7. Products presented with more pictures
8. Ability to get answers to questions or advice from merchant
9. Ability to return merchandise easily
10. Availability of loyalty rewards (such as points toward future purchases or benefits)
11. Better information about products (descriptions, reviews, etc.)
12. Product information presented in an easier to understand format
13. Greater familiarity with the Internet and online purchasing
14. Greater trust in particular online merchants
15. Quicker buying process within an Internet store
16. Alternative delivery options
17. Other (**ANCHOR**)
18. Nothing would motivate me to start purchasing products and services online (**SP - ANCHOR**)

ASK ALL WHO SHOPPED ONLINE IN THE PAST THREE MONTHS (i.e. ASK ALL CODES 1 AND/OR 2 AT Q14), OTHERS GO TO Q22

Q17

In the past 3 months, about how much in total (including shipping and handling) have you spent buying products online, regardless of how you paid? (Please exclude financial products)

Please select one answer only (SP)

*****Varies by country*****

1. Up to £18
2. £19 to £35
3. £36 to £70
4. £71 to £140
5. £141 to £210
6. £211 to £280
7. £281 to £350
8. £351 to £525
9. £526 to £700
10. £701 to £1,050
11. More than £1,050
99. Don't know

ASK ALL WHO SHOPPED ONLINE IN THE PAST THREE MONTHS (i.e. ASK ALL CODES 1 AND/OR 2 AT Q14)

Q18

How often do you buy or order products and services online?

Please select one answer only (SP)

1. About daily
2. Several times per week
3. About once per week
4. Several times per month
5. About once per month
6. Less often than once per month

ASK ALL WHO SHOPPED ONLINE IN THE PAST THREE MONTHS (i.e. ASK ALL CODES 1 AND/OR 2 AT Q14)

Q19

Are you familiar with the concept of "buy online, pick up in store" that is available from some online retailers?

Please select one answer only (SP)

1. Yes and I have used it already

2. Yes, but I have never used it
3. No
4. Don't know

ASK IF CODES 1 OR 2 AT Q19

Q20

What are your expectations when you order through the "buy online, pick up in store" method?

Please select one answer only (SP)

1. The item will be available for pickup immediately
2. The item will not be available for pickup immediately, but will be available for pickup within 24 hours
3. The item will be available for pickup in 1 to 3 days
4. The item will be available for pickup in 4 to 7 days
5. The item will be available for pickup in more than 8 days
6. Don't know

ASK ALL WHO SHOPPED ONLINE IN THE PAST THREE MONTHS (i.e. ASK ALL CODES 1 AND/OR 2 AT Q14)

Q21a

Which, if any, of the following payment methods have you used in the past 3 months to pay for products you bought online?

Please select all that apply (MP)

***** Varies by country *****

1. Credit card
2. Debit/payment card
3. Gift card
4. Prepaid card (e.g. Paysafecard)
5. Online banking transfer
6. PayPal
7. Cash (on delivery)
8. Cheque (UK / FR / IT)
12. Microbilling system (e.g. ClickandBuy)
13. Google Checkout (UK only)
14. Amazon Checkout (UK only)
15. Other payment method
16. None (SP)

ASK ALL WHO SHOPPED ONLINE IN THE PAST THREE MONTHS (i.e. ASK ALL CODES 1 AND/OR 2 AT Q14)

FILTER ROWS ONLY THOSE USED IN THE PAST THREE MONTHS AT Q21a

IF 'NONE' USED IN THE PAST 3 MONTHS AT Q21a GO TO Q22

IF ONE ANSWER SELECTED AT Q21A, AUTOCODE IN DATA AND GO TO Q22

Q21b Thinking about the payment methods you have used in the past 3 months, which one do you prefer to use when paying for products online?

Please select one answer only (SP)

***** Varies by country *****

1. Credit card
2. Debit/payment card
3. Gift card
4. Prepaid card (e.g. Paysafecard)
5. Online banking transfer
6. PayPal
7. Cash (on delivery)
8. Cheque (UK / FR / IT)
12. Microbilling system (e.g. ClickandBuy)
13. Google Checkout (UK only)
14. Amazon Checkout (UK only)
15. Other payment method
16. None (SP)

ASK ALL WHO SHOPPED OR RESEARCHED ONLINE IN THE PAST THREE MONTHS (i.e. ASK ALL CODE 2 AT Q13 OR CODES 1 AND/OR 2 AT Q14)

Q22 And which, if any, of the following websites did you use to:

- a. Research products/services in the past 3 months?
- b. Buy products/services in the past 3 months? – **SHOW ONLY TO THOSE WHO SHOPPED ONLINE IN THE PAST THREE MONTHS (i.e. ASK ALL CODE 1 AND/OR 2 AT Q14)**

Please select at least one answer per column (MP per column)

ROWS

*****Varies by country*****

1. Asda.co.uk
2. Amazon
3. Apple.com
4. Argos
5. ASOS.com
6. British Airways
7. Comet UK
8. Currys
9. Dell
10. EasyJet
11. eBay
12. Expedia.co.uk
13. GAME
14. HMV
15. John Lewis
16. Lastminute.com
17. Marks & Spencers
18. Next
19. Ocado
20. Play.com
21. Tesco.com
22. Ticketmaster
99. None of these

COLUMNS

- a. Researched in the past three months
- b. Bought in the past three months – **SHOW ONLY TO THOSE WHO SHOPPED ONLINE IN THE PAST THREE MONTHS (i.e. ASK ALL CODE 1 AND/OR 2 AT Q14)**

ASK ALL WHO SHOPPED ONLINE IN THE PAST THREE MONTHS (i.e. ASK ALL CODES 1 AND/OR 2 AT Q14)

Q23

Which of the following types of information did you use when considering buying products on retailer's website (e.g. Amazon)?

Please select all that apply (MP)

1. Low price guarantees
2. Product information from the retailer
3. Product information from the manufacturer
4. Product reviews and ratings from other customers
5. Product reviews from professionals/critics
6. Simplified, quick reference guides
7. Detailed product descriptions
8. Lists of products based on retailer recommendations and best sellers
9. Lists of products other people have bought who also bought the item you are looking at
10. Product recommendations that are created by the site based on my browsing/shopping history
11. Product information imported from news and information sites
12. Information about the source of the product (e.g. country of origin like China, USA)
13. Tutorials in how to use the product/learning modules
14. Videos to demonstrate the product
15. Retailer return policy
16. Retailer shipping policy
17. Shipping costs

18. Gift finders
19. Buying guides
20. Retailer privacy and security policy
21. Compare product features and product from other retailers on a retailer site
22. Messages about how many items are left in stock
23. Special offers/discounts (e.g. package deals, online discounts)
24. None of these **(SP)**

ASK ALL WHO SHOPPED OR RESEARCHED ONLINE IN THE PAST THREE MONTHS (i.e. ASK ALL CODE 2 AT Q13 OR CODES 1 AND/OR 2 AT Q14)

Q24

In which of the following ways have you interacted with retailers online in the past 3 months?

Please select all that apply (MP)

1. Shared product information I found on a retailer's website
2. Visited a retailer social networking page
3. Became a fan of a retailer or added a retailer as a friend on my social networking page
4. Became a follower of a retailer on my social networking page
5. Read an official corporate blog written by an online retailer
6. Commented on an official corporate blog written by an online retailer
7. Posted positive product reviews online
8. Posted negative product reviews online
9. Participated in an online forum ran by an online retailer
10. Customised a product on an online retailer's website
11. Customised the website of an online retailer
12. Downloaded content from an online retailer's website (e.g. coupons, product information, widgets)
13. Followed retailers on Twitter
14. Bought products through social networking sites
15. Watched product video from a retailer
16. None of the above **(SP)**

ASK ALL WHO SHOPPED ONLINE IN THE PAST THREE MONTHS (i.e. ASK ALL CODES 1 AND/OR 2 AT Q14)

Q25

Thinking about any online shopping you have done, please indicate how much you agree with each of the following statements, where 5 means you strongly agree and 1 means you strongly disagree.

Please select one answer per row (SP per row)

ROWS

1. I prefer to shop online to avoid crowds when shopping
2. I find better value/deals online
3. I find products online that I cannot find anywhere else
4. I save time by shopping online
5. Shipping prices often deter me from buying online
6. I shop online because I can't find the products I want in stores
7. I like to look at shopping websites (e.g. fashion, technology) to stay up to date with current trends
8. I often go to the store to see and/or try a product first before buying online
9. Alternative payment options like PayPal make me more comfortable with making a purchase
10. I often buy products/services online from retailers that I have bought from before (either online or in stores)
11. I only shop from websites in my native language

COLUMNS

- a. 1- Strongly disagree
- b. 2
- c. 3
- d. 4
- e. 5- Strongly agree

ASK ALL

Q26

Which of the following customer service support methods, if any, have you used in the past 12 months?

Please select all that apply (MP)

For further information, please place your cursor over the coloured text

RANDOMISE

1. I have **not** used **any** customer support methods in the past 12 months (SP, ANCHOR)
2. Help or Frequently Asked Questions (FAQs) on a company's website
3. Sent an email to customer service
4. Instant messaging/online chat with a live person
5. **Screen sharing**
6. **Click-to-call**
7. Keyword search on a company's website
8. Online forum or community with other customers on a company's website
9. Online forum or community with other customers on a third party website
10. Searched for answers on the Web using a search engine (e.g. Google, Yahoo!)
11. Called a company and spoke to an agent
12. **Called a company and used phone self-service**
13. Contacted a company using Twitter
14. **Used an online "virtual agent"**
15. Sent a mobile / SMS message to the company requesting assistance
16. Watched an online video to help customers (i.e. instructions on how to assemble)
17. Other

ASK ALL

Q27 Please tell us which of the following statements do you agree with?

Please select all that apply (MP)

*****Varies by country (text only)*****

RANDOMISE

1. I am very likely to abandon my online purchase if I cannot find a quick answer to my questions
2. Having my questions answered by a live person while I am in the process of my online shopping is one of the most important features on a website
3. I like having an instant messaging/online chat box appear and ask if I need help with my online research or purchase
4. I trust the content on a company's social community or forum is unbiased and reliable content from other customers
5. I prefer to initiate contact with a company for customer service rather than have them contact me to ask if I need help
6. I always prefer the telephone for customer service rather than using online customer service
7. If I need to speak with a live agent, I would prefer a service to have someone call me back rather than wait on hold
8. I am very unlikely to return to a website that does not provide a satisfactory customer service experience
9. **Access to online customer service content (i.e. FAQ's, Help content) in languages other than English would be extremely useful for me**
10. It has a strong negative impact on my perception of a company when I read complaints or negative comments about customer service from other consumers on Twitter, Facebook or other social websites
11. I have a very favourable reaction to a brand when I see a company has responded to fix a consumer's negative comment on a social website
12. None of these (SP, ANCHOR)

ASK ALL

Q28

On average, how often do you use the mobile Internet?

Please select one answer only (SP)

1. I don't own a mobile phone **GO TO Q33**
2. Several times a day
3. About once a day
4. At least weekly
5. At least monthly
6. Less than monthly
7. Never
8. Don't know

ASK ALL WHO OWN A MOBILE PHONE (i.e. ALL CODES 2-8 AT Q28)

Q29

What brand is your primary mobile phone handset?

Please select one answer only (SP)

1. Apple/iPhone
2. Google Android phone
3. HTC
4. LG
5. Motorola
6. Nokia
7. Panasonic
8. RIM/BlackBerry
9. Sagem
10. Samsung
11. Sony Ericsson
12. Other
13. Don't know

ASK ALL EXCEPT IPHONE AND BLACKBERRY USERS (DO NOT ASK TO c.1 OR c.11 AT Q29)

Q30

What operating system does your mobile phone use?

Please select one answer only (SP)

1. iOS (**do not display; populate this option from brand of handset code 1 at Q29 (iPhone)**)
2. RIM (**do not display; populate this option from brand of handset question code 11 at Q29 (RIM/BlackBerry)**)
3. Android (made by Google)
4. Windows Phone/Windows mobile (made by Microsoft)
5. Symbian
6. Other
7. I know what an operating system is, but don't know what type of operating system my mobile phone has
8. I don't know what an operating system is

ASK ALL WHO OWN A MOBILE PHONE (i.e. ALL CODES 2-8 AT Q28)

Q31

Which of the following have you ever used your mobile phone for?

Please select all that apply (MP)

1. To locate a nearby store to purchase a specific product
2. To check store opening hours
3. To read customer reviews of a product
4. To check in-store availability of a product
5. To add a product to a wish list
6. To compare physical store prices with online prices, when shopping in a store
7. To look up online product information while shopping in a store
8. To learn about an in-store promotion or event
9. To find or redeem a coupon/coupon code
10. To use a special mobile shopping application (e.g. Red Laser, Kraft iFood Assistant)
11. To purchase an item that was not available/in-stock in the store

12. To check on the status of an order
13. None of these (SP)

ASK ALL WHO OWN A MOBILE PHONE (i.e. ALL CODES 2-8 AT Q28)

Q32a

Have you ever used your mobile phone to purchase a product without speaking to anyone (i.e. without calling the retailer, wireless carrier, or seller)?

Please select one answer only (SP)

1. Yes
2. No

ASK ALL WHO HAVE USED THEIR PHONE TO PURCHASE A PRODUCT (i.e. ALL CODE 1 AT Q32a)

Q32b

How did you purchase that product?

Please select all that apply (MP)

1. By accessing the mobile Internet to visit a retailer's mobile website
2. By using a mobile payment service like PayPal Mobile
3. By using a service provided by your wireless carrier (e.g. V Cast, Power Vision)
4. By text messaging a short code (i.e. a five-digit number)
5. By using a special mobile shopping application (e.g. Red Laser, Kraft iFood Assistant)
6. Other

ASK ALL

Q33

On which of the following websites, if any, have you ever:

- a. read online customer ratings/reviews of products or services
- b. posted online customer ratings/reviews of products or services

Please select at least one answer per column (MP per column)

ROWS

****Varies by country****

UK

1. Amazon
2. Ciao
3. DooYoo
4. Epinions
5. Kelkoo
6. PriceRunner
7. ReviewCentre
8. Shopping.com
9. TripAdvisor
99. None of these (SP)

SW: PLEASE LEAVE SPACE FOR 30 CODES FOR EACH MARKET

COLUMNS

- a. Read a ratings/review
- b. Posted a ratings/review

ASK ALL

Q34a

There are many ways to put your own opinions, videos, music, and photos on the Internet. Which of the following activities do you do at least monthly?

Please select all that apply (MP)

****Varies by country (examples only)****

RANDOMISE

1. Publish, maintain or update a blog
2. Upload video you created to a public website (e.g. YouTube, MySpace)
3. Upload audio/music you created to a public website
4. Post to photo-sharing sites (e.g. Snapfish, Flickr)
5. Publish or update your own Web pages
6. Write articles, stories, poems etc. and post them online (e.g. Gather, Helium, thenextbigwriter.com)
7. None of these (SP, ANCHOR)

Q34b

There are also many ways to contribute to, organise or “tag” content on websites on the Internet. Which of the following activities do you do at least monthly?

Please select all that apply (MP)

****Varies by country (examples only)****

RANDOMISE

1. Comment on someone else’s blog
2. Post ratings/reviews of products or services (e.g. Amazon)
3. Contribute to online forums or discussion groups
4. Contribute to/edit articles in a wiki (e.g. Wikipedia)
5. Use RSS (Really Simple Syndication) feeds
6. Add labels or “tags” to Web pages, online photos, etc. (e.g. Delicious, Flickr)
7. “Vote” for websites online (e.g. Digg, Reddit)
8. None of these (SP)

Q34c

There are also many ways to consume content, including social content, on websites on the Internet. Which of the following activities do you do at least monthly?

Please select all that apply (MP)

****Varies by country (examples only)****

RANDOMISE

1. Read blogs
2. Watch video from other users (e.g. YouTube)
3. Listen to or download audio/music from other users
4. Read online forums or discussion groups
5. Read customer ratings/reviews of products or services (e.g. Amazon)
6. Listen to podcasts
7. Use personal portal/content sites (e.g. My Yahoo!)
8. View photo-sharing sites (e.g. Flickr)
9. None of these (SP)

Q34d

There are also many ways to participate in online social networks like MySpace, Facebook and LinkedIn. Which of the following activities do you do at least monthly?

Please select all that apply (MP)

****Varies by country (examples only)****

RANDOMISE

1. Update/maintain a profile on a social networking site (e.g. MySpace, Facebook)
2. Visit social networking sites (e.g. MySpace, Facebook)
3. Add comments to someone’s page or profile on a social networking site (e.g. MySpace, Facebook)
4. Read other people’s updates on Twitter
5. None of these (SP)

Q34e

There are also many ways to converse with others on the Internet. Which of the following do you do at least weekly?

Please select all that apply (MP)

****Varies by country (examples only)****

1. Post updates on Twitter
2. Update your status on a social networking site (e.g. MySpace, Facebook)
3. None of these (SP)

ASK ALL

Q35

Which of the following websites do you visit at least monthly?

Please select all that apply (MP)

RANDOMISE

****Varies by country****

1. Facebook
2. MySpace
3. Twitter
4. LinkedIn
5. Flickr
6. Wikipedia
7. YouTube
8. Windows Live
99. None of the above (SP, ANCHOR)

SW: PLEASE LEAVE SPACE FOR 30 CODES FOR EACH MARKET

ASK ALL

NUMBER OF TRIPS SELECTED FOR ROW 1 HAS TO BE EQUAL WITH THE SUM OF NUMBER OF TRIPS SELECTED FOR CODES 2 TO 7

Q36

In this survey "LEISURE/PERSONAL travel" means travel for holidays, family visits, or other personal reasons.

In the past 12 months, how many trips have you taken for leisure/personal travel, excluding school, routine shopping, or commuting purposes, of more than 80 kilometers (or 50 miles) each way from your home?

And how many of your LEISURE/PERSONAL trips involved air travel, a hotel stay, car rental, long-distance/inter-city rail, holiday packages, or using your own car for the entire trip?

Please select one answer per row (SP per row)

ROWS

1. Leisure trips total
2. Airline flight
3. Car rental
4. Hotel /B&B
5. Inter-city rail (e.g. EuroStar, TGV)
6. Package holiday
7. Using your own car for the entire trip

COLUMNS

- a. 0/None
- b. 1 trip
- c. 2 trips
- d. 3 trips
- e. 4 trips
- f. 5 trips
- g. 6 trips
- h. 7 trips
- i. 8 - 10 trips
- j. 11 - 19 trips
- k. 20 or more trips

ASK ALL WHO TRAVEL FOR LEISURE (i.e. ASK ALL CODING b-k IN ROW 1 AT Q36)

Q37

To the best of your recollection, about how much did you and members of your household spend on leisure/personal travel in the past 12 months?

In your answer, please include the cost of airline tickets, hotels, cruise tickets, holiday packages, car rentals, and long-distance train tickets, but do not include the cost of meals, beverages, entertainment, souvenirs, shopping, petrol, or other personal items.

Please select one answer only (SP)

****Varies by country (currency labels only)****

1. £1 - £400
2. £401 - £800
3. £801 - £1600
4. £1601 - £2400
5. £2401 - £3200
6. £3201 - £4000
7. £4001 - £4800
8. £4801 - £8000
9. £8001 - £12000
10. £12001 - £16000
11. £16001 - £24000
12. £24001 or more
13. Don't Know/Not Sure
14. My household spent no money on leisure travel

ASK ALL WHO TRAVEL FOR LEISURE (i.e. ASK ALL CODING b-k IN ROW 1 AT Q36)

Q38

Please tell us how much you agree or disagree with each of the following statements, where 5 means you strongly agree and 1 means you strongly disagree.

Please select one answer per row (SP per row)

ROWS

1. I usually have a destination in mind when I begin researching my leisure trips
2. Staying within my budget is more important to me than going to my first choice destination
3. Travel is an area in which I indulge myself
4. I am taking more time for myself now than I did a year ago
5. I avoid staying at certain hotels that I can afford because I don't see photos, video or written information that would make me think I'd feel comfortable at them
6. I travel to play and have fun
7. I will pay above-average prices for a noticeably better-quality travel product or service
8. I will pay above-average prices for travel products that save me time and hassles
9. In general, I select the lowest-priced travel options available to me
10. I will accept some inconveniences (such as an inconvenient flight schedule) in order to save money on travel
11. I am "making do" with fewer things, and that's OK

COLUMNS

- a. 1- Strongly Disagree
- b. 2
- c. 3
- d. 4
- e. 5 – Strongly Agree

ASK ALL WHO TRAVEL FOR LEISURE (i.e. ASK ALL CODING b-k IN ROW 1 AT Q36)

Q39

Which of the following have you used to research/plan leisure/personal travel in the past 12 months?

Please select all that apply (MP)

****Varies by country (examples only)****

1. Visit, call, or email a high street travel agent
2. Visit or call a travel provider directly (e.g. call an airline or a hotel, or go to a rail or airline ticket office)
3. Use a high street travel agency website (e.g. thomascook.co.uk)
4. Use a Travel Club (e.g. [M&S](#), [HSBC](#))
5. Use the website of an airline, hotel or other travel supplier (e.g. Novotel.com, Ryanair.com)
6. Use a Web-based travel agency (e.g. lastminute.com, Expedia)
7. Use a general search engine (e.g. Google)
8. Use a travel search/price comparison site (e.g. [Kelkoo](#), [Mobissimo](#))
9. Use a tourist/visitor bureau website (e.g. VisitLondon.com)
10. Use a traveller written review site (e.g. TripAdvisor)
11. App on a mobile phone/smartphone
12. App on a tablet computer
13. TV commercial
14. Newspaper or magazine advertisement
15. Email from a travel company
16. Ask friends and family
17. "Flash sale" website/email (e.g. [Voyage Prive](#))
18. "Deal of the day" website/email (e.g. [Groupon](#))
19. Other
20. None of these (SP)
21. I have not personally researched leisure travel in the past 12 months (SP)

ASK ALL

Q40

Have you noticed any travel offers or promotions on social networking sites like Facebook or MySpace in the past 12 months?

Please select one answer only (SP)

1. Yes
2. No

ASK ALL

Q41

Some social networking sites will soon be selling products/services directly through their profile pages. Would you consider planning and/or buying travel on social networking sites in the next 12 months?

Please select one answer only (SP)

1. Yes
2. No

ASK ALL WHO STAYED AT HOTEL IN THE PAST 12 MONTHS (i.e. ASK ALL CODING b-k IN ROW 4 AT Q36)

Q42

Which, if any, of the hotels below did you stay with in the past 12 months?

Please select all that apply (MP)

Varies by country

1. Best Western
2. Hilton Hotels
3. Holiday Inn
4. Marriott Hotels & Resorts
5. Mercure
6. Novotel
7. Premier Classe
8. Radisson Edwardian Hotels
9. Ramada
10. Sheraton Hotels & Resorts
11. Sofitel Hotels
12. Travelodge
99. None of these (SP)

ASK ALL WHO TRAVEL FOR LEISURE (i.e. ASK ALL CODING b-k IN ROW 1 AT Q36)

Q43

In the past 12 months, how much of your leisure/personal travel have you researched online and how much of your leisure/personal travel have you booked (i.e. reserved or purchased) online?

Please select one answer per row (SP per row)

ROWS

1. Researched online
2. Booked online

COLUMNS

- a. None
- b. Less than half
- c. About half
- d. More than half
- e. All

ASK IF RESEARCHED OR BOUGHT TRAVEL ONLINE AT (i.e. ASK ALL CODING b-e IN ROW 1 OR 2 at Q43)

DISPLAY COLUMN A IF RESEARCHED ONLINE (i.e. IF b-e IN ROW 1 AT Q43)

DISPLAY COLUMN B I IF BOUGHT ONLINE (i.e. IF b-e in ROW 2 at Q43)

Q44

Please tell us which of the following leisure/personal travel products or services you have researched or booked online in the past 12 months.

Please select at least one answer per column (MP per column)

ROWS

1. Leisure trips total
2. Airline flight
3. Car rental
4. Hotel/motel/B&B
5. Inter-city rail (e.g. EuroStar, TGV)
6. Package holiday
7. None of these (SP)

COLUMNS

- a. Researched online
- b. Booked online

ASK ALL WHO TRAVEL FOR LEISURE (i.e. ASK ALL CODING b-k IN ROW 1 AT Q36)

Q45

Which of the following have you used to actually book leisure/personal travel in the past 12 months?

Please select all that apply (MP)

****Varies by country (examples only)****

1. Call or visit a high street travel agent
2. Call or visit a travel supplier directly (e.g. call an airline or a hotel, or go to a rail or airline ticket office)
3. A Travel Club (e.g. M&S, HSBC)
4. A high street travel agency website (e.g. thomascook.co.uk)
5. A website of an airline, hotel or other travel supplier (e.g. Novotel.com, Ryanair.com)
6. A Web-based travel agency (e.g. lastminute.com, Expedia)
7. App on your mobile phone/smartphone
8. App or browser on your tablet computer
9. Other
10. I have not personally booked leisure travel in the past 12 months (SP)

ASK ALL WHO TRAVEL FOR LEISURE (i.e. ASK ALL CODING b-k IN ROW 1 AT Q36)

Q46

When you first think about taking a trip for LEISURE, which of the following websites are you most likely to visit FIRST to research or plan?

Please select one answer only (SP)

****Varies by country (examples only)****

RANDOMISE OPTIONS

1. Travel agency website (thomascook.com)
2. Travel supplier website (Novotel.com, Ryanair.com)
3. Web-based travel agency (e.g. Expedia)
4. Discount travel site where you cannot choose specific hotels or flights
5. Travel section on Web portal travel site (e.g. Yahoo! Travel, MSN Travel Central)
6. General search engine (e.g. Google, Yahoo!)
7. Deal-of-the-day site (e.g. Groupon.com)
8. Tourist/convention bureau website (VisitLondon.com)
9. Travel search/price comparison site (e.g. Kayak)
10. Travel sales and specials site (e.g. TravelZoo)
11. Traveller community site (e.g. FlyerTalk.com)
12. Traveller-written review site (e.g. TripAdvisor)
13. Social networking site (e.g. Facebook, Twitter)
14. Other
15. None of these

ASK ALL WHO TRAVELLED FOR LEISURE AND OWN A MOBILE PHONE (i.e. ALL CODING b-k IN ROW 1 AT Q36 AND CODE 2-8 AT Q28.

Q47

Which of the following travel activities are you interested in doing on your mobile phone (using a mobile application, mobile browser, OR SMS/text)?

Please select all that apply (MP)

1. Looking up a flight's departure or arrival status
2. Checking-in for a flight
3. Using your mobile device as an airline boarding pass
4. Looking up a train schedule
5. Booking a train ticket
6. Checking into a hotel
7. Checking out of a hotel
8. Using your mobile device as a hotel room key
9. Requesting a hotel room upgrade
10. Requesting a flight upgrade
11. Getting updates on baggage arrival status
12. Changing/cancelling existing travel reservations
13. Locating services in an airport (e.g. ATMs, airline lounges)
14. Checking in for your rental car
15. Checking in your rental car upon return
16. Booking a taxi or a car service
17. Booking destination activities/events (e.g. making dining reservations, buying music concert tickets)
18. Booking a flight
19. Booking a hotel
20. Booking a rental car
21. Other
22. I am not interested in using my mobile device to help me with my travel (SP)

ASK ALL WHO TRAVELLED FOR LEISURE AND OWN A MOBILE PHONE (i.e. ALL CODING b-k IN ROW 1 AT Q36 AND CODE 2-8 AT Q28.

Q48

Which of the following types of travel-related apps (free or paid) have you downloaded to your mobile phone in the last 12 months?

Please select all that apply (MP)

RANDOMISE

1. Apps that track flight status, delays, cancellations, and/or gate changes (e.g. FlightTrack, FlightView)

2. Apps from airlines that allow you to book, check-in, and view flight schedules (e.g. British Airways)
3. Apps from hotels that allow you to find hotels, check-in, and choose bed/pillow type (e.g. Hilton)
4. Apps from Web-based travel agencies that search for hotels, flights, and travel deals (e.g. Expedia)
5. Apps that check live weather and forecasts (e.g. WeatherBug)
6. Apps that find nearby restaurants, movies, or businesses (e.g. Yelp)
7. Apps that search for hotel rooms, flights, and travel deals (e.g. Travelocity, Kayak)
8. Apps that act as city guides for specific destinations (e.g. TimeOut)
9. Other
10. I have not downloaded any travel-related apps to my phone in the last 12 months (SP, ANCHOR)

ASK ALL WHO TRAVEL FOR LEISURE (i.e. ASK ALL CODING b-k IN ROW 1 AT Q36)

Q49

Please tell us how much you agree or disagree with each of the following statements, where 5 means you strongly agree and 1 means you do not agree at all?

Please select one answer per row (SP per row)

ROWS

1. It's easy to use the Internet to plan and buy travel
2. I enjoy planning and buying travel on the Internet
3. It's difficult to find the travel information I want online
4. It's more convenient to research travel offline (by calling a travel supplier, visiting a travel agent, etc.)
5. I do not trust the Internet for accurate or updated travel information
6. I am concerned about disclosing personal information to travel companies online
7. Travel websites clearly present my choices and trade-offs
8. Travel websites help me save money
9. If I could find a good travel agent to work with, I would
10. It is important to me that a travel website is available in my own language when researching and booking leisure travel online
11. When buying leisure/personal travel, I consider myself to be "brand loyal" (that is, I prefer to do business with certain travel companies)

COLUMNS

- a. 1 – Strongly Disagree
- b. 2
- c. 3
- d. 4
- e. 5 – Strongly Agree

ASK ALL

Q50

Below is a list of statements, which may or may not describe your attitudes towards technology and your lifestyle. Please indicate to what extent each statement describes your attitude, where 10 means it describes your attitude completely and 1 means it does not describe your attitude at all.

Please select one answer per row (SP per row)

RANDOMISE

ROWS

1. Most of my spare time is devoted to activities with my family
2. I like technology
3. I am constantly looking for new ways to entertain myself
4. I spend most of my free time doing fun stuff with my friends
5. My family is by far the most important thing in my life
6. I put a lot of time and energy into my career
7. Technology is important to me
8. I am very competitive when it comes to my career
9. I like to impress people with my lifestyle
10. I like to show off my taste and style
11. Making a lot of money is important to me
12. Having fun is the whole point of life
13. When making online purchases, my personal financial information (e.g. credit card numbers) is very secure

COLUMNS

- a. 1 - Does not describe my attitude at all
- b. 2

- c. 3
- d. 4
- e. 5
- f. 6
- g. 7
- h. 8
- i. 9
- j. 10 - Describes my attitude completely

ASK ALL

Q51

Which of the following best describes your working status?

Please select one answer only (SP)

1. Looking after the home or family full time
2. Working in a paid job or self employed (30+ hours a week)
3. Working in a paid job or self employed (8-29 hours a week)
4. Working in a paid job or self employed (under 8 hours a week)
5. Working in an unpaid job/doing voluntary work
6. Unemployed/redundant and looking for work
7. Permanently sick or disabled and not able to work
8. Retired from paid work
9. A student at school/college/university or in training

ASK IF IN PAID WORK OR SELF EMPLOYED (i.e. ALL CODES 2-4 AT Q51)

Q52

Which of the following best describes the type of job that you do?

Please select one answer only (SP)

1. Senior management (e.g. Director)
2. Middle management
3. Junior management/supervisor
4. Professional (e.g. Dentist, Lawyer)
5. Technical specialist
6. Clerical/administrative
7. Skilled manual (e.g. Electrician, hairdresser, mechanic, etc.)
8. Semi- or unskilled manual (e.g. Security guard, waitress, trainee, etc.)
9. Other

ASK ALL

Q53

What is the highest level of education you have?

Please select one answer only (SP)

****Varies by country****

UK

1. Primary school only (to age 11 or 12)
2. Secondary school (to age 14, 15 or 16)
3. Secondary school (to age 17, 18 or 19)
4. Beyond secondary school but below degree level
5. Beyond secondary school to degree level
6. Beyond degree level (e.g. masters degree, PhD, etc.)

Q54

How many people live in your household (including yourself)?

Please select one answer only (SP)

1. One
2. Two
3. Three
4. Four

5. Five or more

Q55

Are you a parent/step-parent?

Please select all that apply (MP)

1. I'm a parent/step-parent of a child under 16 and they live with me
2. I'm a parent/step-parent of a child under 16 and they do not live with me
3. I'm a parent/step-parent of a child over the age of 16 and they live with me
4. I'm a parent/step-parent of a child over the age of 16 and they do not live with me
5. I'm not a parent/step-parent (SP)

ASK IF MORE THAN 'ONE' PERSON IN HOUSEHOLD (i.e. CODES 2-5 AT Q54)

Q56

How many children younger than 16 live in your household?

Please select one answer only (SP)

1. None **SHOW ALWAYS**
2. One **SHOW IF CODE 2 OR 3 OR 4 OR 5 SELECTED AT Q54**
3. Two **SHOW IF CODE 3 OR 4 OR 5 SELECTED AT Q54**
4. Three **SHOW IF CODE 4 OR 5 SELECTED AT Q54**
5. Four **SHOW IF CODE 5 SELECTED AT Q54**
6. Five or more **SHOW IF CODE 5 SELECTED AT Q54**

ASK IF ONE OR MORE CHILD IN HOUSEHOLD (i.e. CODES 2-6 AT Q56)

Q57

What are the ages of the children living in your household?

Please select all that apply (MP)

1. Under 6 months
2. 6 to 12 months
3. 1 to 2 years old
4. 3 to 4 years old
5. 5 to 6 years old
6. 7 to 12 years old
7. 13 to 16 years old

As with all other questions, your answers to this last question will not be linked back to your name or address. Your answers are added to those from other people and are used purely for analysis purposes to see how many people in total are in each income band.

ASK ALL

Q58

What is the gross annual income of your household (before tax)?

Please select one answer only (SP)

****Varies by country (currency labels only)****

UK

1. Under £5,000
2. £5,000-£7,999
3. £8,000-£11,999
4. £12,000-£15,999
5. £16,000-£19,999
6. £20,000-£23,999
7. £24,000-£27,999
8. £28,000-£31,999
9. £32,000-£35,999
10. £36,000-£43,999
11. £44,000-£59,999

12. £60,000-£79,999
13. £80,000-£99,999
14. £100,000 or more
15. Don't know
16. Prefer not to answer