TITLE OF CASE STUDY: Kayak.com, Search One & Done

Business Situation and Campaign Objectives

The founders of KAYAK.com got tired of digging their way through bad travel sites so one day they decided they could do it better. And they did. Enter KAYAK.com – a travel site with an all-new meta search engine that makes searching for travel online as in-depth & thorough as Google searches feel to consumers. Unlike their competitors who make money when people book travel, KAYAK.com is based on delivering relevant search quiries to people, who can then click on the most relevant deal for them to go to the offering site to buy their travel. Quite simply, they offer better travel search because they search all other sites for you through their top-secret algorithm. And they don't make money off people booking the travel, so it's fundamentally more truthful to the consumer – they simply offer you choices. Instead of going to all the sites yourself, KAYAK.com does it for you.

It's an amazing product. And people who use it love it. But the company struggled at getting the word out- how do you convince people in a heavily commoditized market (both online travel & the airline industry are both price driven- a double whammy) that there is a better way – and it really is free to them? Who would believe them? Plus, they were "last to market", with Expedia and Travelocity launching 8 years before, Priceline 6 years, Trip Advisor 4 years, Orbitz 3 years and Hotel.com 2 years.

From this conundrum a beautiful partnership was born. KAYAK.com came to GS&P and the mixture was powerful; the most innovative travel company in existence with the best product available, partnering with a strong strategic creative team who uses research as the foundation from where to discover consumer truths.

The Challenge: Evolve KAYAK.com from a "no-name" to a "big name" brand in a commoditized, price driven, market and infuse loyalty to the brand by sharing their core differentiation in a clear & meaningful way to consumers. Our goals were to 1) grow awareness of the KAYAK.com brand, 2) communicate the brands' unique meta search product differentiation clearly, and 3) drive people to the site.

The Story of How Research Continuously Infused the Campaign

At the time of KAYAK.com's launch, competitors had developed considerable brand awareness & brand affinity. Competitor brand awareness was approximately three times that of KAYAK.com, while their usage over the past 12 months ranged from 2 to 4 times greater than KAYAK.com:
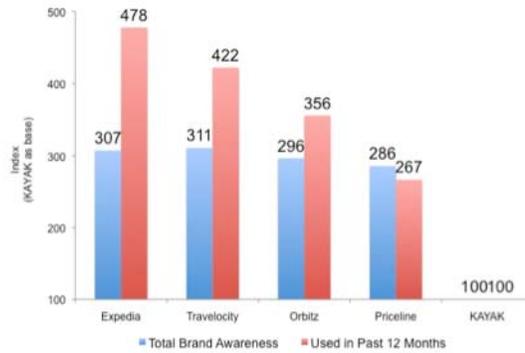
Awareness and Usage in Past 12 Months
Competitors vs. KAYAK.com, KAYAK.com Index =100
TNS Pre Wave Tracker, November 2009

The bottom line; we had 12 months to do what the online travel site brand leaders had achieved in eight years, and a budget three-quarters that of the marker leaders Expedia, Orbitz, and Travelocity (Source: AdViews, October 2010). We needed to break people's entrenched online travel booking behavior and get them to start using KAYAK.com.

Being a start up company KAYAK.com's founders knew their proposition was totally different from others & that it was better, but we needed to see what consumers thought. We designed a usability test where consumers would actually use the product & tell us what they thought (Agency Usability Research, July 2010). But first we asked them about the industry as a whole, preferred brands, impressions & how they search. The results showed that people search multiple sites as they have no faith that any one will deliver them what they need, that there is awareness of some brands but little understanding of the promise behind them, nor was there any differentiation between them. We knew KAYAK.com's unaided awareness was low, under 10%, but the total lack of recognition we saw strongly clarified the challenge. Then we had them play with KAYAK.com & the light bulb when on – we heard things like "I wouldn't need to go anyplace but here with this kind of site", an idea was born.

THE BIG IDEA: KAYAK.com is the only online travel site you need

The consumer "pre/post" KAYAK.com experience plus in-depth interviews with the KAYAK.com developers was the right stimulation our creative team needed. We knew we needed to increase awareness of the brand dramatically and now we knew there was something really different that consumers valued that we could communicate to build a strong, sustainable brand.

Several positioning expressions were developed and put into testing to see which one best communicated the proposition (Agency Quant Research, September 2009). One out performed all others as the one that would drive people to the site most the next time they went online to search for travel. What was even more interesting was the number of times one of the taglines associated with this creative was played back throughout the open-ends -> "Search One & Done" was stickier than we knew (See Appendix for quotes). And more so than any other line tested. Not only did this research

confirm which way was best at communicating the proposition, it also solidly nailed the tagline that delivered on the promise.

Simultaneously, TNS launched a consumer online tracking study, fielded among apx 2,000 consumers per quarterly wave Nationally. Pre-launch waves were done so we could explore product feature importance, brand association, awareness & loyalty levels, and the target. Advanced analytics, including regression analysis & factor analysis, showed that searching for multiple sites in one place was a strong driver of preference. Furthermore, it showed that competitive brands did not score highly in this area, but they did all score equally highly in the other areas – ones that were clearly cost-of-entry attributes and not differentiating (See Appendix). This quantitative evaluation proved we were onto something with the KAYAK.com positioning.

We knew the creative had to hit the ground running – it had to break through powerfully, be memorable & make people question what was going on, yet they had to link it all together and to KAYAK.com. We created a visual device affectionately named "Flippy" (a flip style information board seen, the type seen in airports prior to the digital age) to illustrate exactly what happens when a search is conducted at KAYAK.com; the names of travel sites whirl past as their information is tapped, and the final resting result is the perfect travel deal. This device is used in all communications and even become the logo.

We created an advertising campaign with two stages; "stand up", and then "stand out". The "stand up" TV spots were intended to simply generate awareness at scale (*get us famous, fast*) and launched in Q4 2009. There were deliberately tongue in cheek and designed to entertain, maybe even shock and get KAYAK.com on the radar of options. We showed, variously, a sexagenarian getting ready to storm the beaches (not of Normandy but of his youth in Cancun), an 'inappropriate office relationship' plainly getting ready to hit the road and a shared room, and two nuns about to embark on the journey to find their true selves – in Vegas. Everything was united under the one establishing thought of: *Compare hundreds of travel sites at once. KAYAK. Search One and Done.* The TV ads were complemented with high impact billboards in tourist-mecca places like Times Square and key airports, paired with online advertising designed for scale and efficiency.

But we needed to make sure we hadn't gone too far with the humor in the ads. Copy testing was done with a new series of questions developed to directly address the appropriateness of the humor – had we crossed the line or not? Simultaneously, one of the ads was shown to our internal research team using the Neurofocus technology to see what areas of the brain it triggered. And thirdly, we reached out to 100 consumers with the same Dial Technology used in the Super Bowl Ad Meter testing through Lombardo Consulting. During this testing we watched peoples reactions, second by second, to see if any areas of the ad went too far, followed by in-depth discussion to tease out the "why's". What we discovered allowed us to tweak the ads to be humorous, but not offensive. These results were compared back to our copy testing system and we were able to select questions we felt were the best predictors of this dynamic for use in future copy tests. All ads produced throughout the year were copy tested with the additional humor module to make sure we were on target.

Once we had established our presence, we quickly followed up with ads designed to position KAYAK.com as the only online travel site you need with a second phase of messaging ("stand out" and get *conversations to conversions*) which broke in Q1-2 2010: Once again, neither agency or client shied away from the risqué. This was travel for grown ups and so referencing speed dating, 'team bonding' and even money saved on travel for massages (from a masseur called Magnus who entered popular culture as the bearer of "bliss") was fair game. It wasn't all played for laughs. These TV ads were designed to startle people into paying attention & make them curious about what they were missing. We tested several possible creative expressions for each round to determine which ideas were strongest & best communicated the message. Out of 5 ad concepts tested, 1 or 2 were fully developed, on average, at each stage. The TV ads were complemented with contextually relevant out of home, like taxi tops and airports, and targeted online advertising. We considered the online ads to be, effectively, our "end-aisle display" designed to drive traffic to the site. In order to ensure the online work was doing this we tested it against PSA ads to see incremental lift in click & view throughs, optimizing site placements and messages along the way.

The Results

After the launch of the campaign the TNS brand tracker was fielded at specific intervals to check if we were building awareness, communicating the intended message, and linking this to the KAYAK.com brand. While we had tested the creative before launch to make sure it was communicating the message, we still had to check that it was working in-market. The tracker showed amazing awareness growth already within the first 6 months – stronger than we had seen with other brands at such an early stage of the campaign.   By the 12 month mark brand awareness increased by a factor of 79 - meanwhile usage doubled. Total Awareness of the brand went up 22% - almost twice what it was at launch, while Unaided Awareness more than doubled.
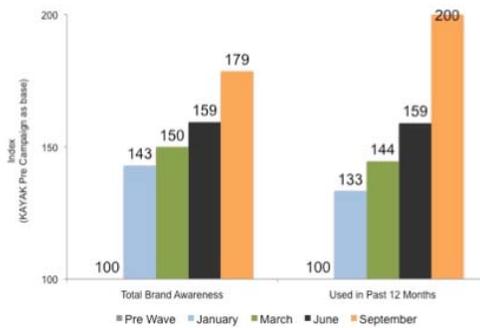
TNS Brand Tracker, September 2010 Wave
Awareness & Usage Past 12 Months (KAYAK.com = 100 Index)

We also carved out a firm positioning for KAYAK.com in this short period of time as an information aggregator. The "Search One and Done" benefit started being linked to the KAYAK.com brand, while no other competitor increased in this area at all.

Searches more travel sites than other sites do

Searches every travel related site to find all the information

Searches all options in one place

Pre Campaign   Post (Sept '10)

TNS Brand Tracker, September 2010 Wave

In the words of TNS (Post Wave, Sept 2010); "KAYAK made some inroads during the September wave. Brand awareness (both unaided and total) increased and reached their highest levels to date. Significant gains are also evident in usage (ever used, used past 12 and 3 months). Two-thirds of online travelers have strong consideration for KAYAK. KAYAK TV campaign maintains the dramatic jumps in correct branding and ad diagnostics observed last wave".

Even better, the site itself saw dramatic increases in traffic and usage. The original goal of increasing site usage by 30% was almost doubled to 50%. (Source: KAYAK.com). Search query volume increased by 41% during the campaign (Nov '09 – Sept '10) (Source: KAYAK.com). Even with this huge increase in new people checking out the site, "Search to visit ratios" and "click-through-rates" held steady which meant people were coming to KAYAK.com to conduct a search AND found a travel deal easily (Source: KAYAK.com). Importantly, revenue increased commensurate with the search volume gains (Source: KAYAK.com).

Finally, the brand showed signs of pulling ahead of the competition as daily Google queries for KAYAK.com significantly outpaced competitors during the period of the campaign (normalized growth). In the months preceding advertising, KAYAK.com brand search queries tracked with the OTA peer set. After the campaign launched, KAYAK.com significantly outpaced the category consistently. (Source: Google Brand Query. September 2010). The peer index is a set of OTA and other travel site competitors.
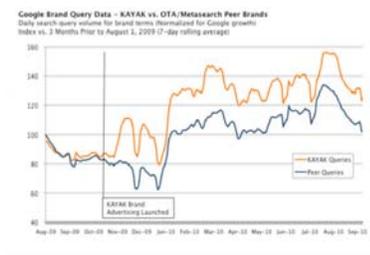

In the final analysis, KAYAK.com has become a known and well used brand that is starting to own a unique teritory in an otherwise commoditized market. All done in 1 year, thanks to consumer research allowing us to be strong & move fast correctly.

Wait till you see what we're doing with hotels next – we've just finished 6 months of really great research!
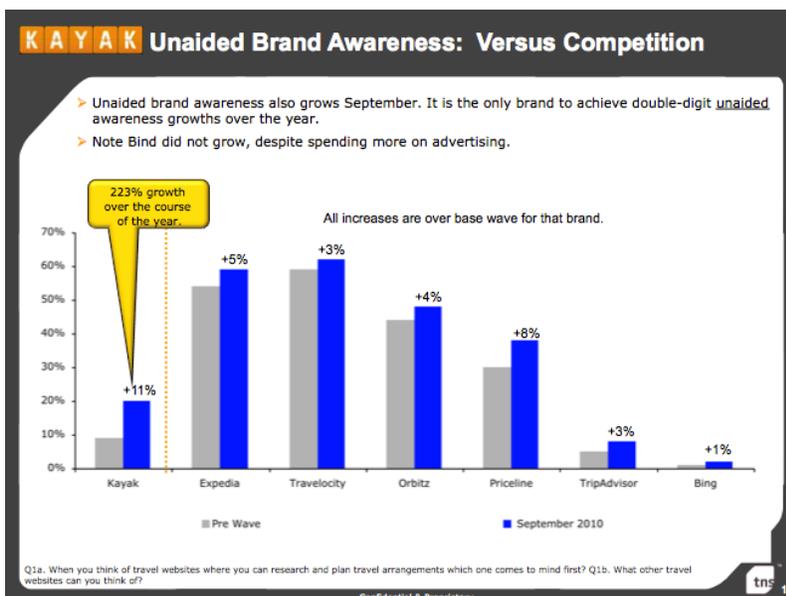
APPENDIX

Brand Awareness Change Trended: KAYAK.com

Note actual % replaced with growth due to sensitive nature of information. A "+22%" means that if the base awareness was 10%, then the awareness after the 1 year of the campaign would have been 32%. Also note that 10% was not the base awareness of the brand.
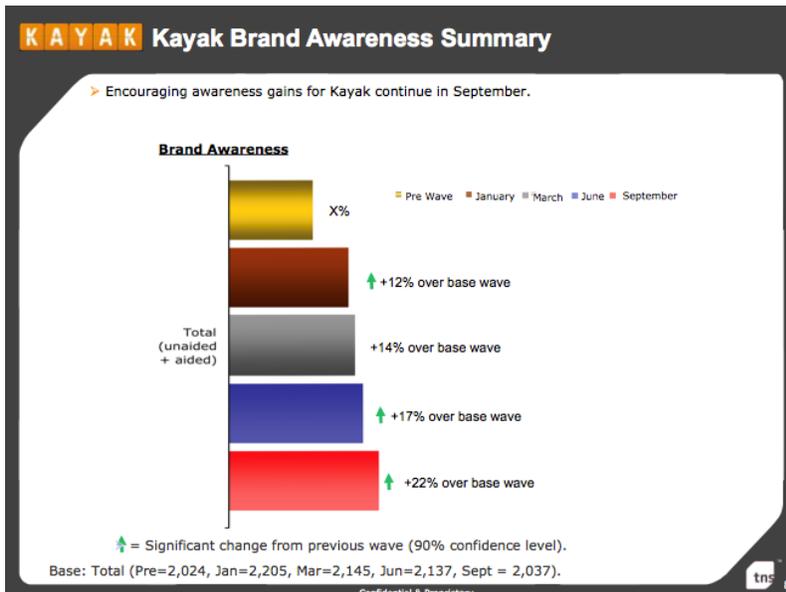

Brand Awareness Change pre/post: KAYK.com & competitors

Brand Image Increases on Core Product Differentiation pre/post: KAYK.com

Note actual % replaced with growth due to sensitive nature of information. A "+22%" means that if the base awareness was 10%, then the awareness after the 1 year of the campaign would have been 32%. Also note that 10% was not the base awareness of the brand.
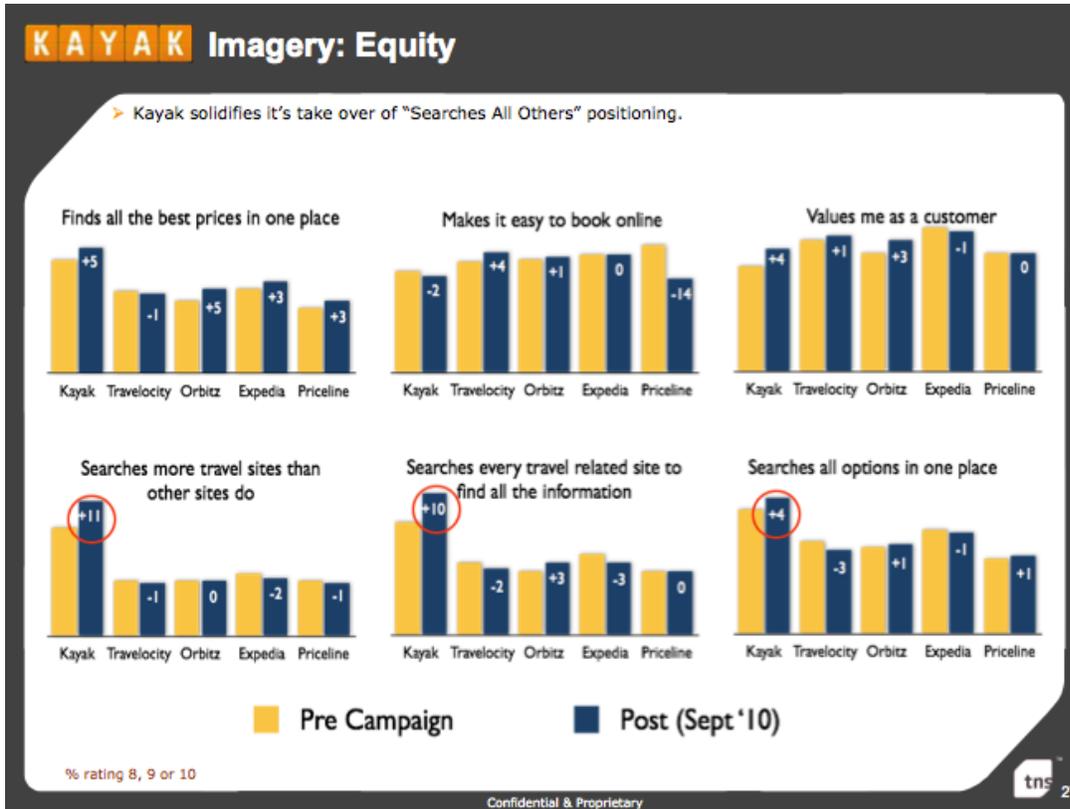
Quotes from Agency Quant Positoning Test (Sept 2009) on Tagline "Search One & Done"

Enlarged chart on Google Search (from Page 5)

Google Brand Query Data – KAYAK vs. OTA/Metasearch Peer Brands
Daily search query volume for brand terms (Normalized for Google growth)
Index vs. 3 Months Prior to August 1, 2009 (7-day rolling average)