



The 2012 affluent traveler

Google/Ipsos OTX MediaCT
U.S., July 2012

Methodology

- Google commissioned OTX, an independent marketing research company, to conduct a travel tracking study to better understand the role travel plays in the lives of U.S.
- Respondents completed a 21 minute attitude & usage survey into travel habits and attitudes. If qualified, respondents were routed to one of four deep dive sections: Airline, Cruise, Lodgings, and Car Rental
- Interviews were conducted from 4/24/12 to 5/17/12 yielding a total sample of 5,000 consumers who have traveled at least once for leisure reasons (or a minimum of 3 times for business purposes) in the past six months
- An augment of 1,500 affluent leisure travelers and 1,000 cruisers were also recruited

Traveler types defined



Leisure traveler
has taken at least one trip for
leisure in the past 6 months



Business traveler
has taken at least three trips for
business in the past 6 months



Affluent traveler
has taken at least one trip for leisure
in the past 6 months and has a
household income of \$250K+

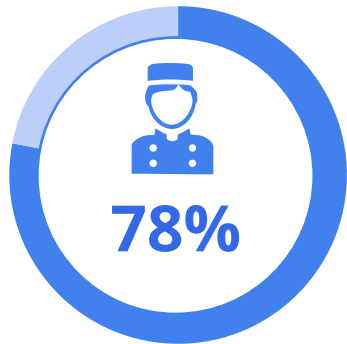
Key findings

- 1** The **Internet continues to be the most prevalent tool** for Affluents when planning travel, as they decrease their use of traditional sources such as print, TV and radio. Most use **search engines as their go-to sources** of information.
- 2** Affluent Travelers continue to **increase their use of smartphones and tablets** to research travel. 1 in 2 Affluents has booked travel on mobile devices **due to its convenience**.
- 3** Affluents **consult different types of online videos** throughout the planning process, and in many cases videos **prompt their destination decision**.
- 4** **Comparison shopping continues to be high** in Affluent Travelers for flights, hotels, car rentals and cruises.
- 5** The most popular loyalty programs among Affluents are **air and hotel programs**. **87% are somewhat or very loyal** to their programs.

Affluent traveler attitudes and online behavior

Affluent traveler mindset

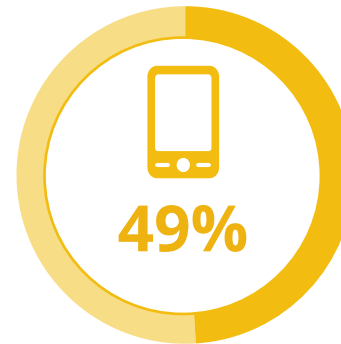
Agreement with 'next year' vacation statements



would like to stay in an upscale or luxury hotel if the price is right



view search engines as their go-to source



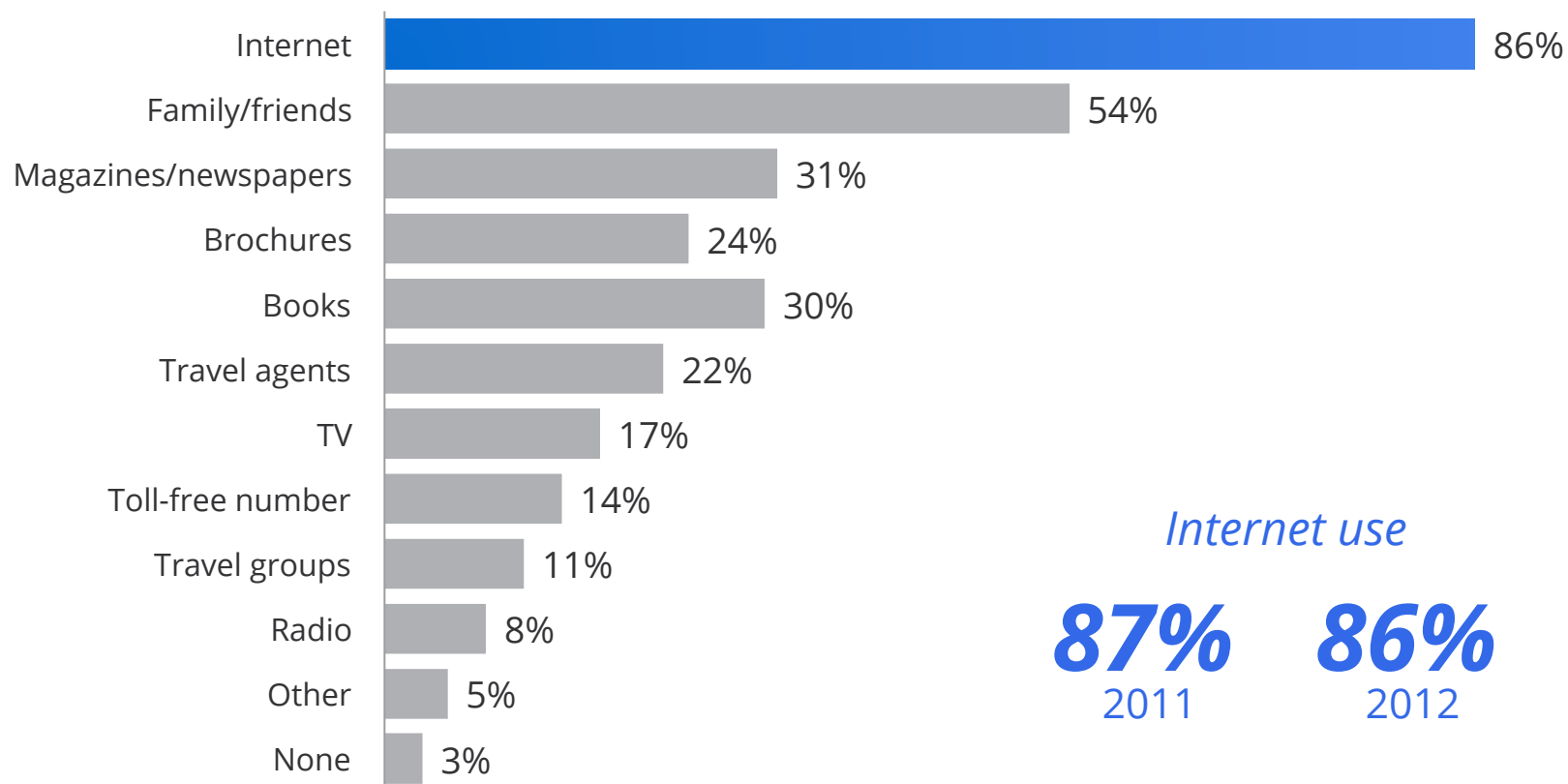
are more likely to use mobile devices for travel information while on trips



plan to spend more time shopping around before booking to ensure value

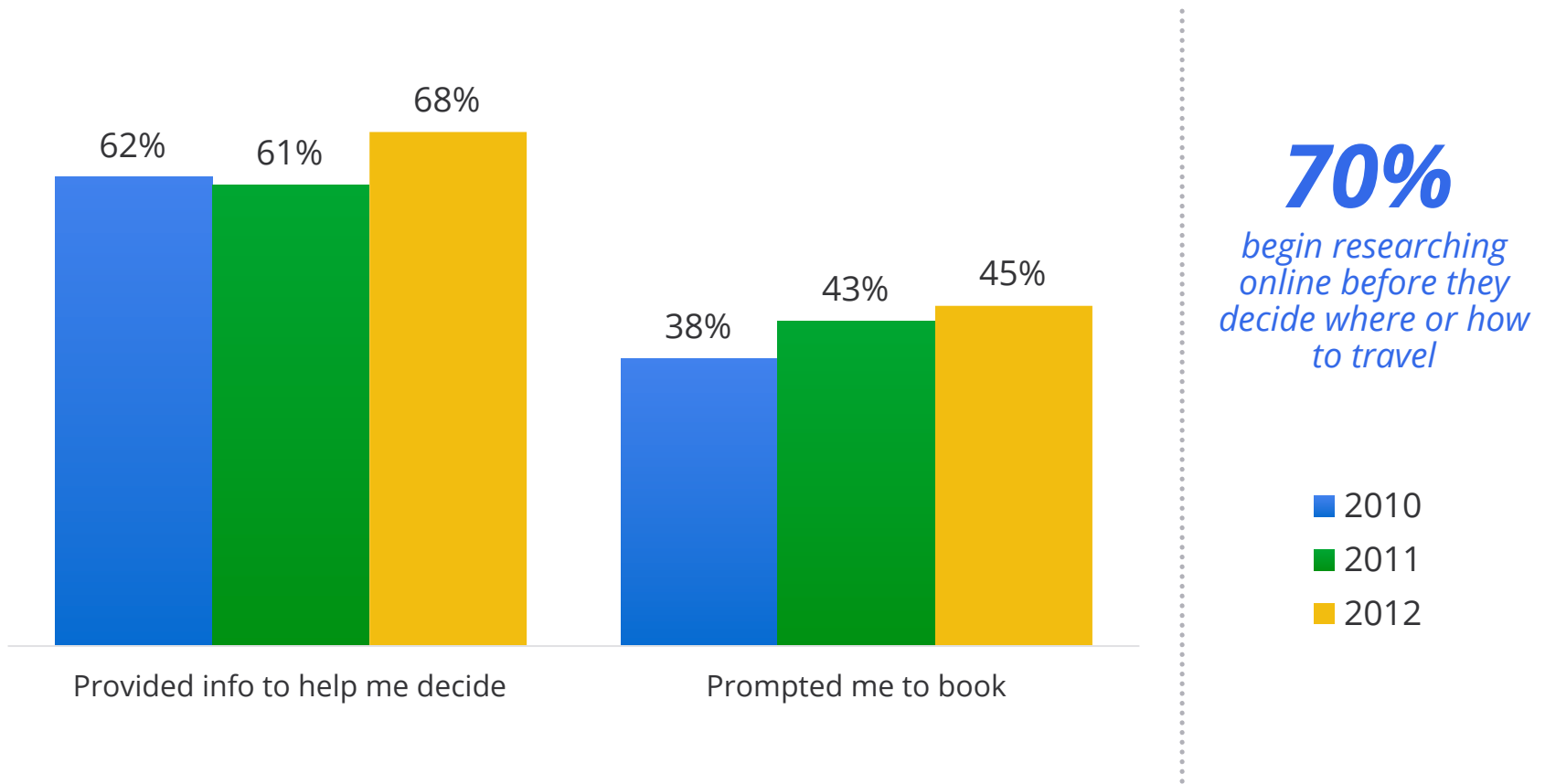
Affluent travelers shift from offline media, continue to use the internet the most

Sources used by affluent travelers to plan travel



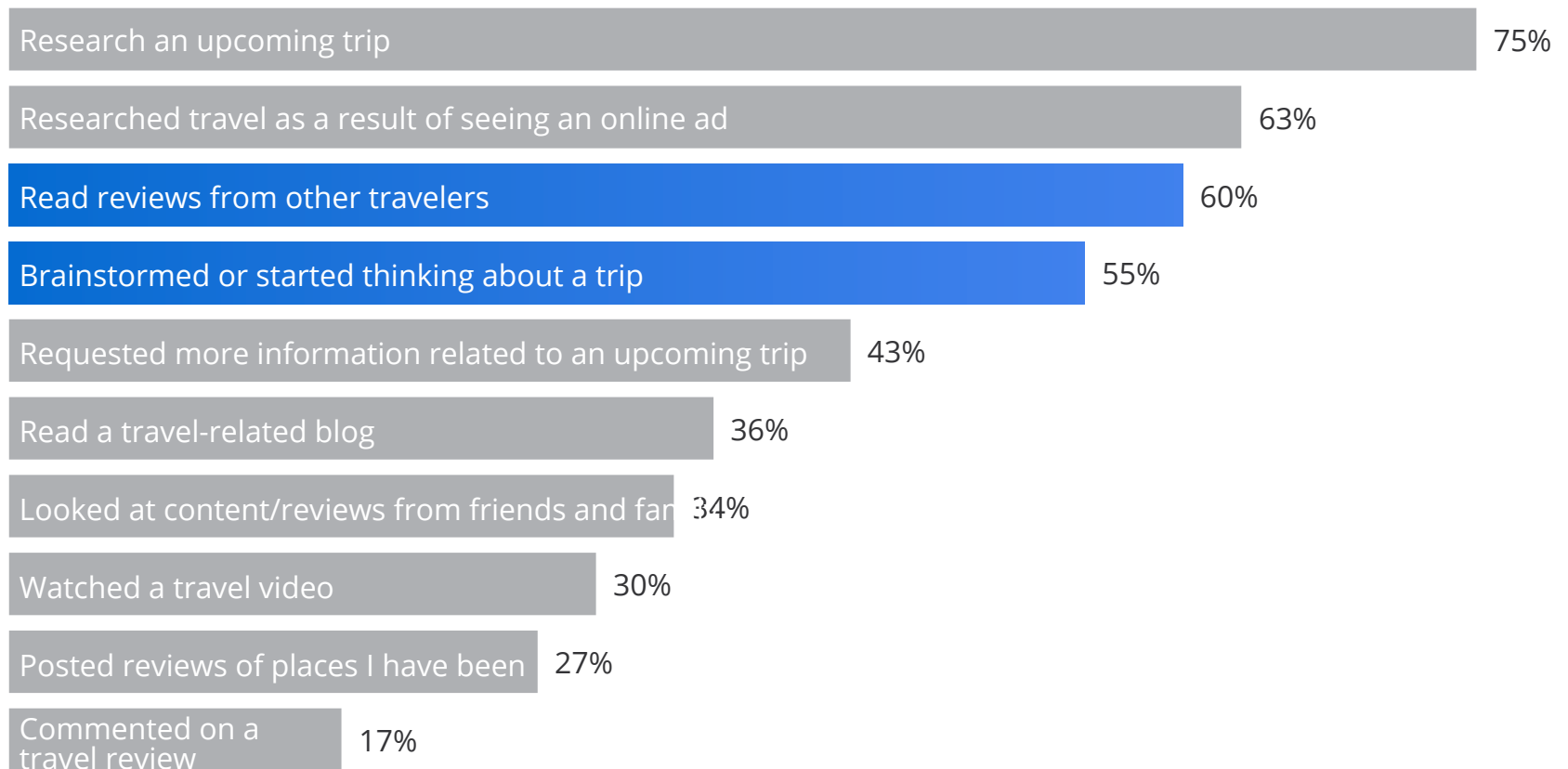
Affluents leverage the internet more for decision making and booking vs. just research

Effect of the internet on trip planning



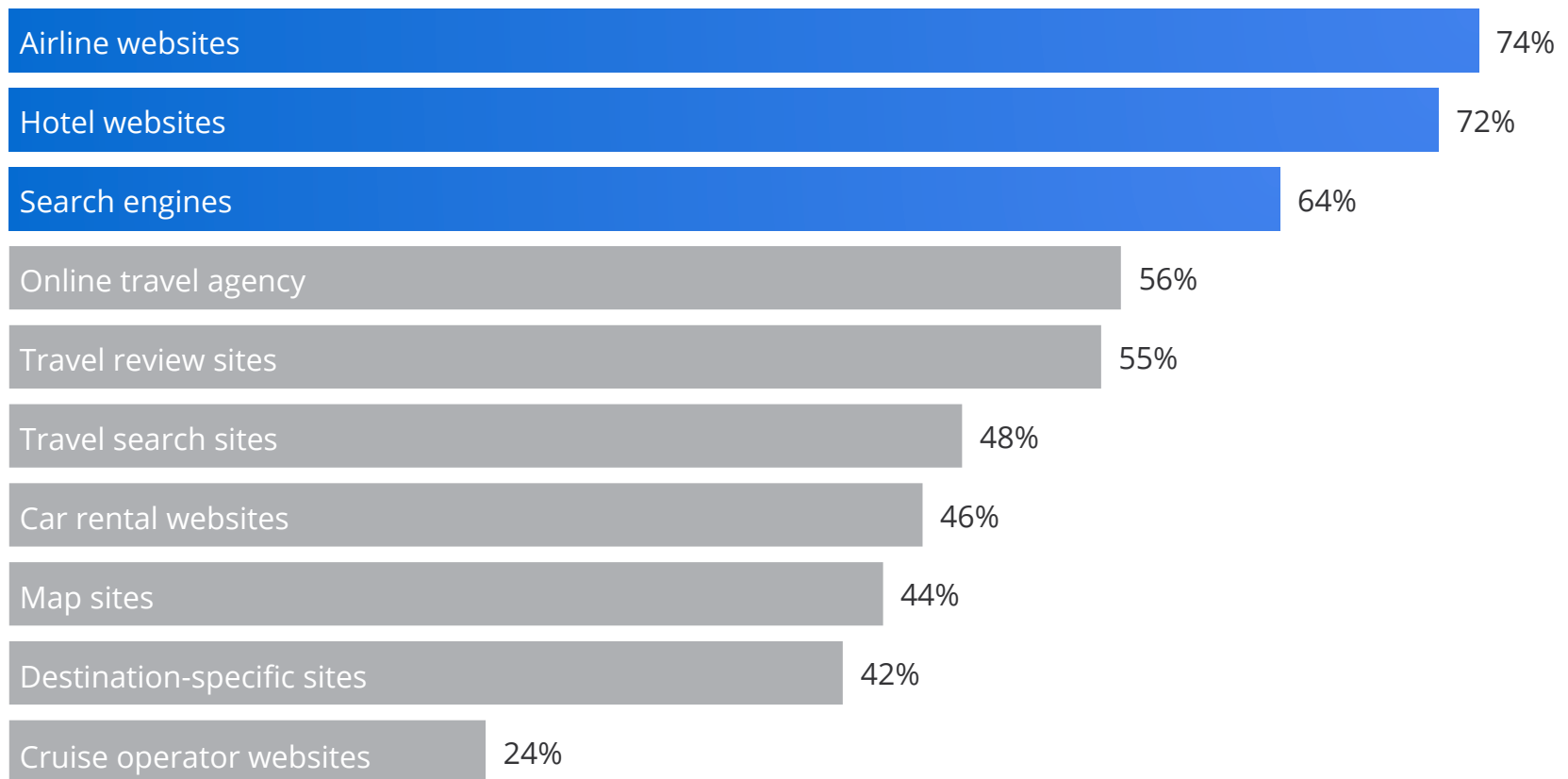
Affluent use of the internet for reviews and travel inspiration increasing compared to 2011

Top 10 online travel-related activities



Affluent travelers continue to prioritize brand sites and search engines for trip planning

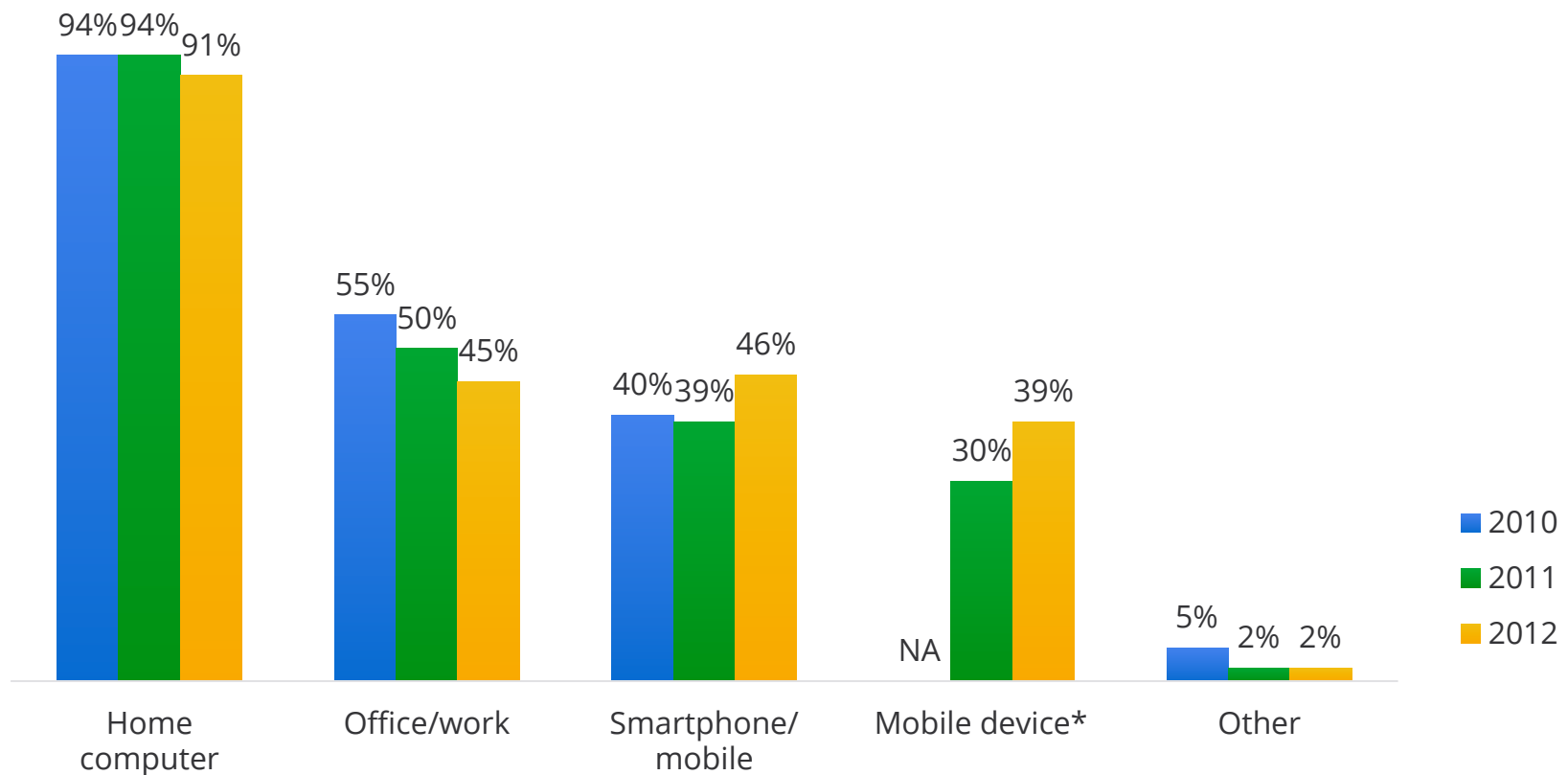
Top 10 online sources used



Affluent mobile usage

Affluent use of mobile devices for travel increasing

Where travel-related information is accessed





76%

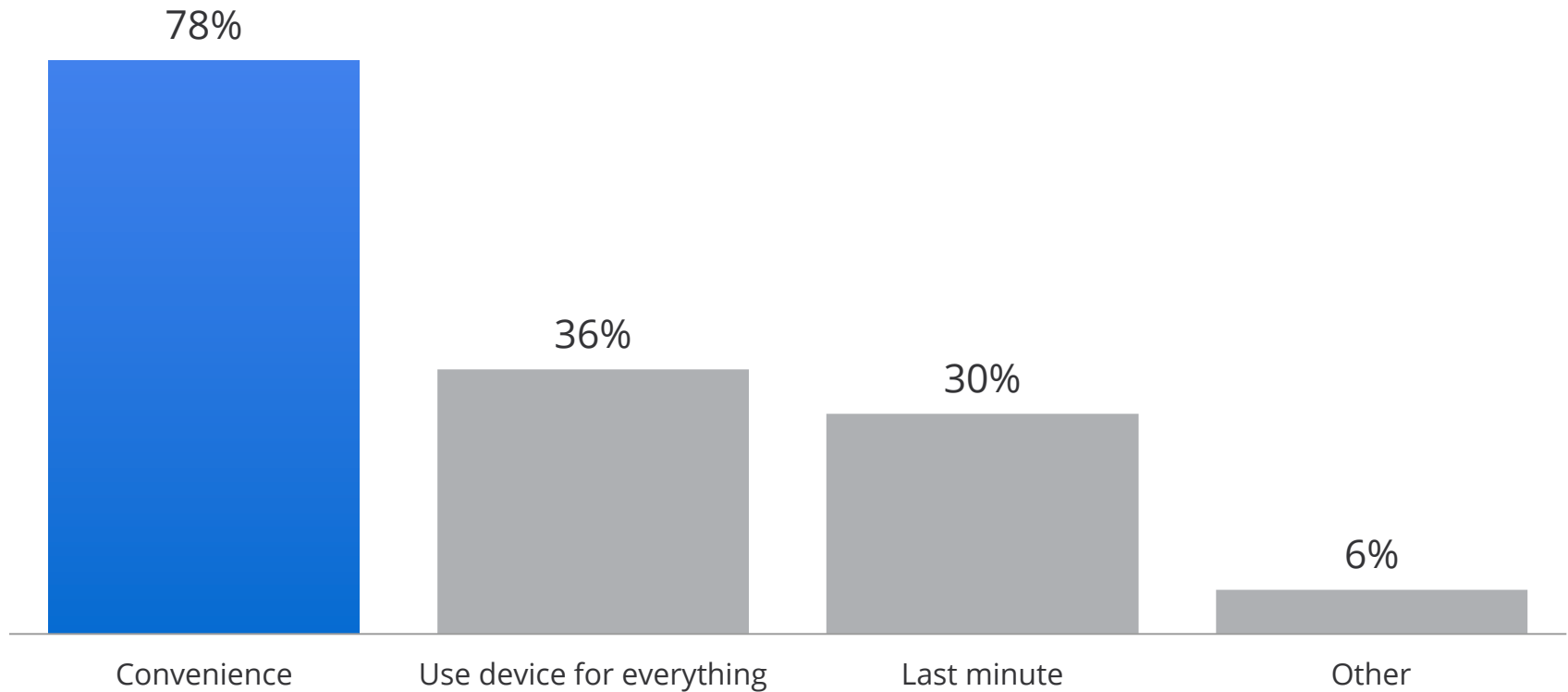
of affluent travelers use a smartphone, mobile device or tablet to access the internet

59%

use a mobile device to access travel information*

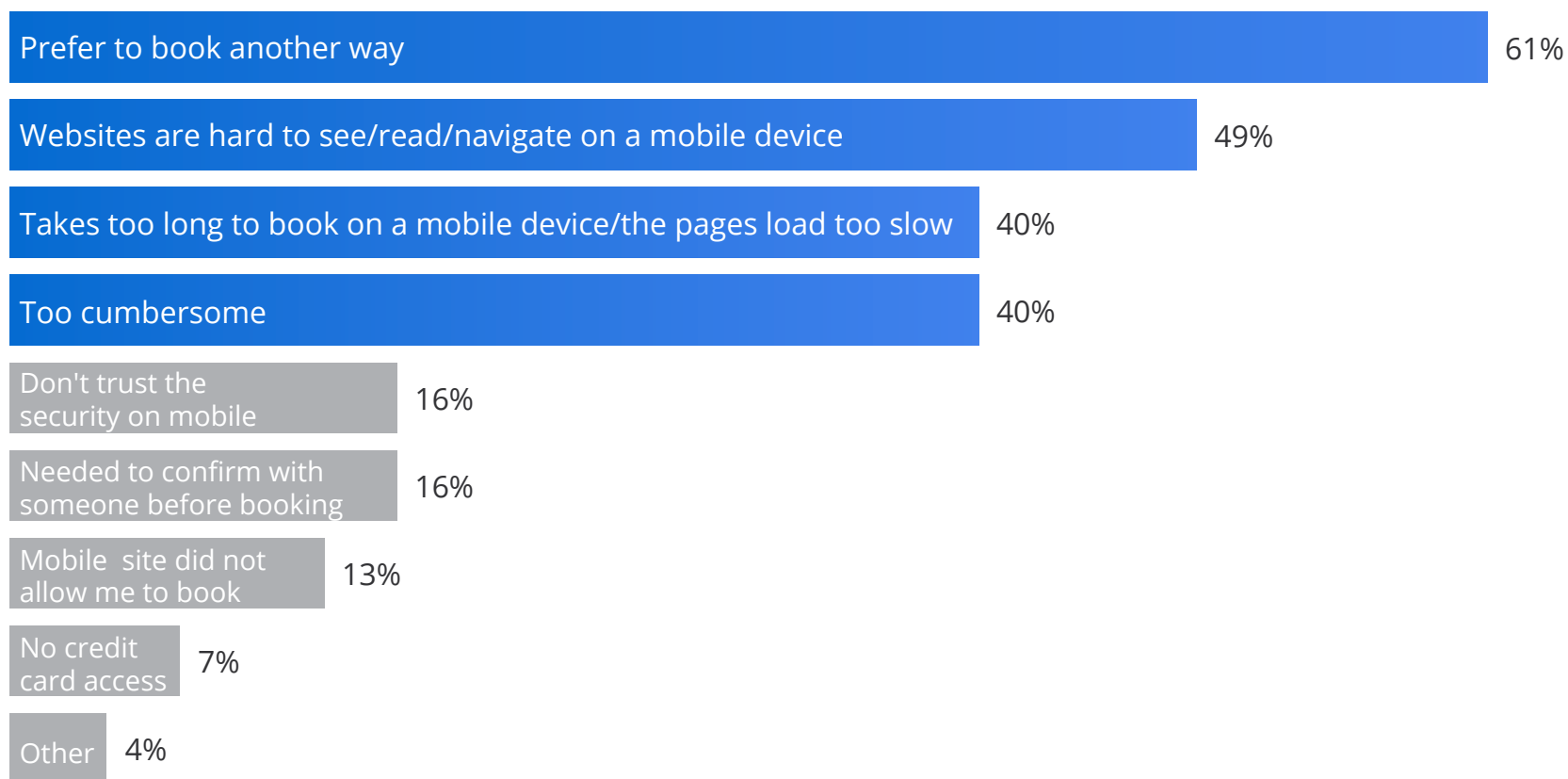
1 in 2 affluents has booked travel on mobile devices, largely due to convenience

Reasons for mobile travel bookings



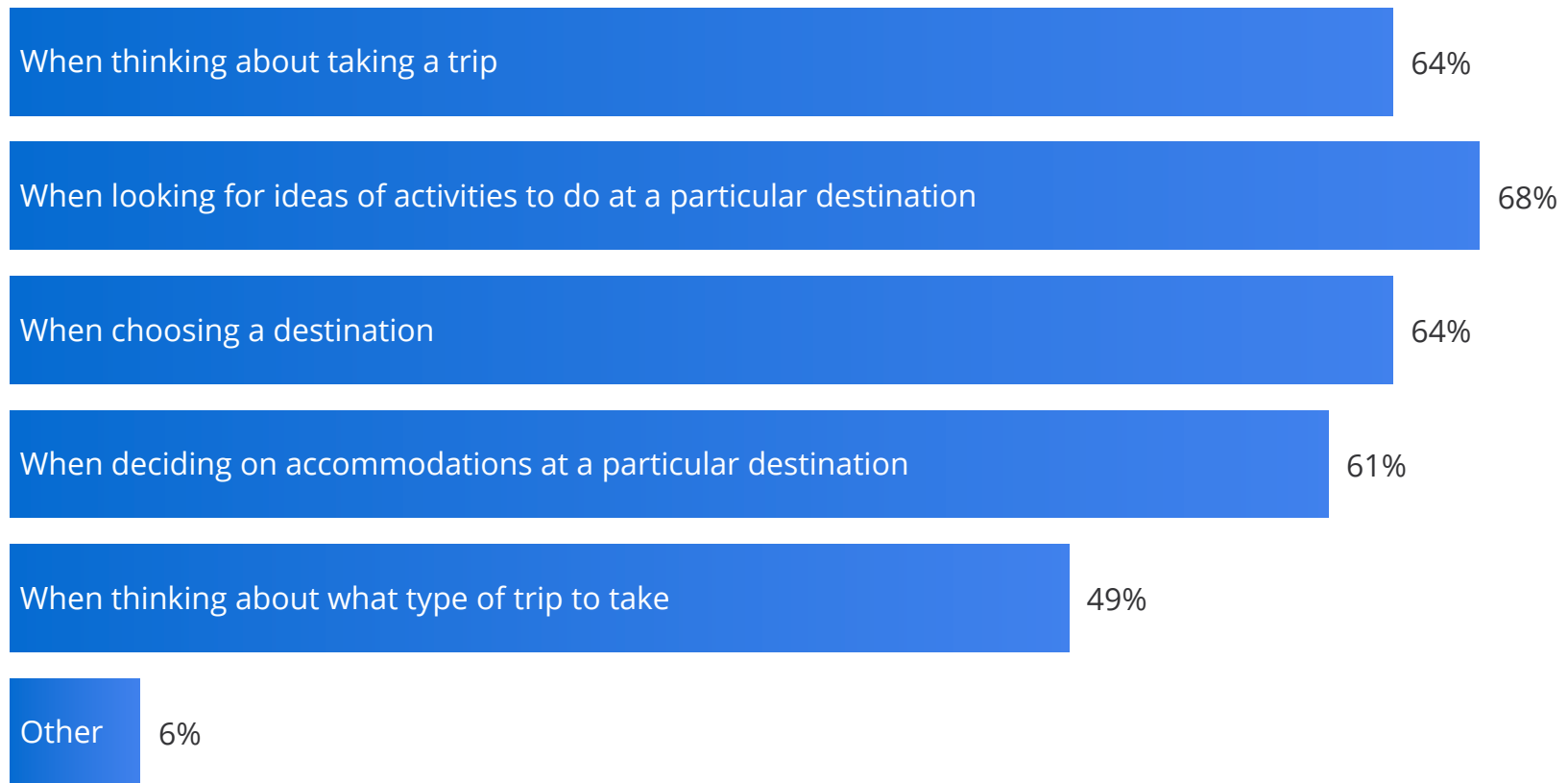
Personal preferences and challenging navigation limit affluent bookings on mobile devices

Reasons for not booking on a mobile device



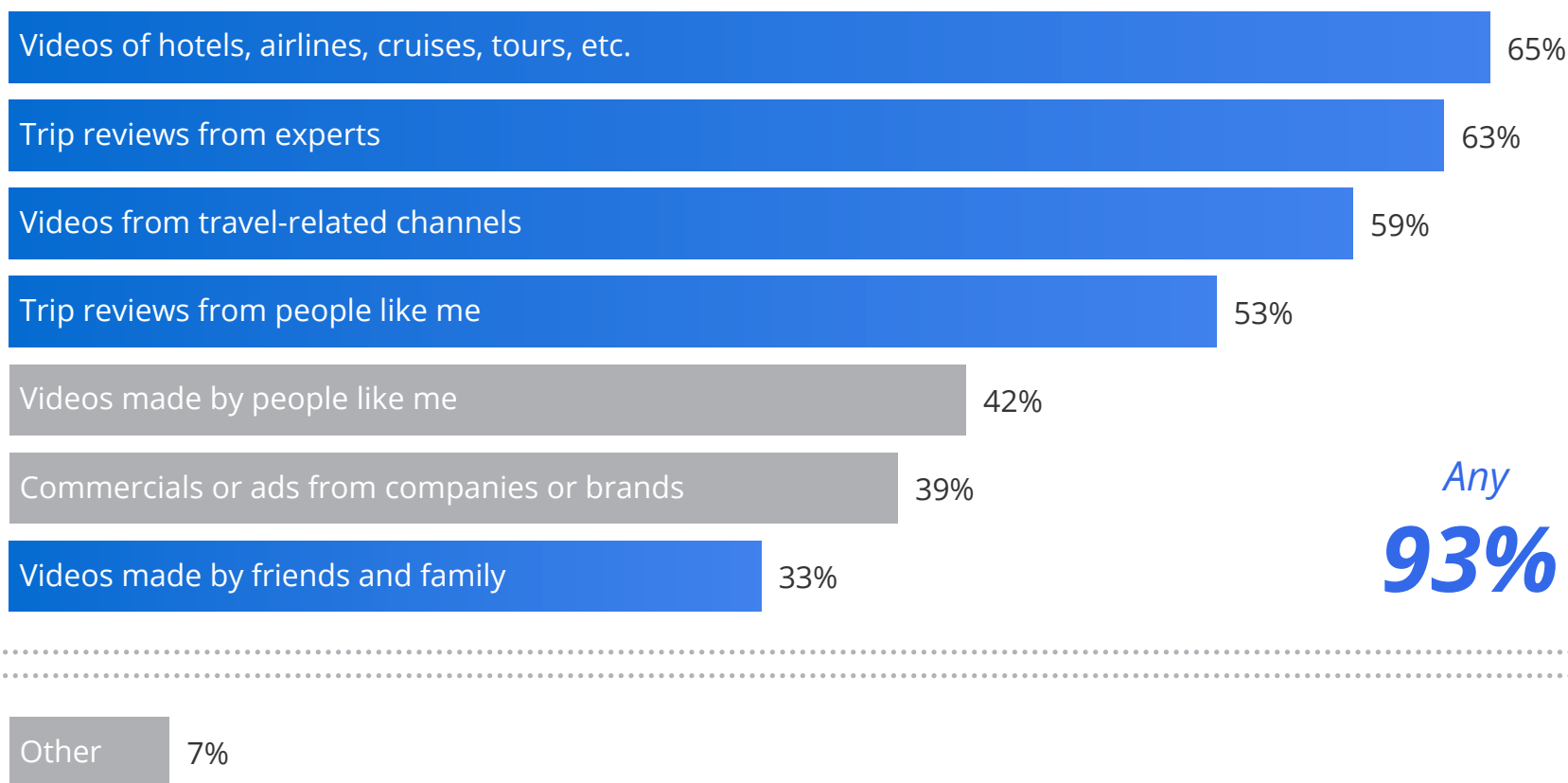
Affluent *video* usage

Affluent travelers view videos throughout the travel planning process



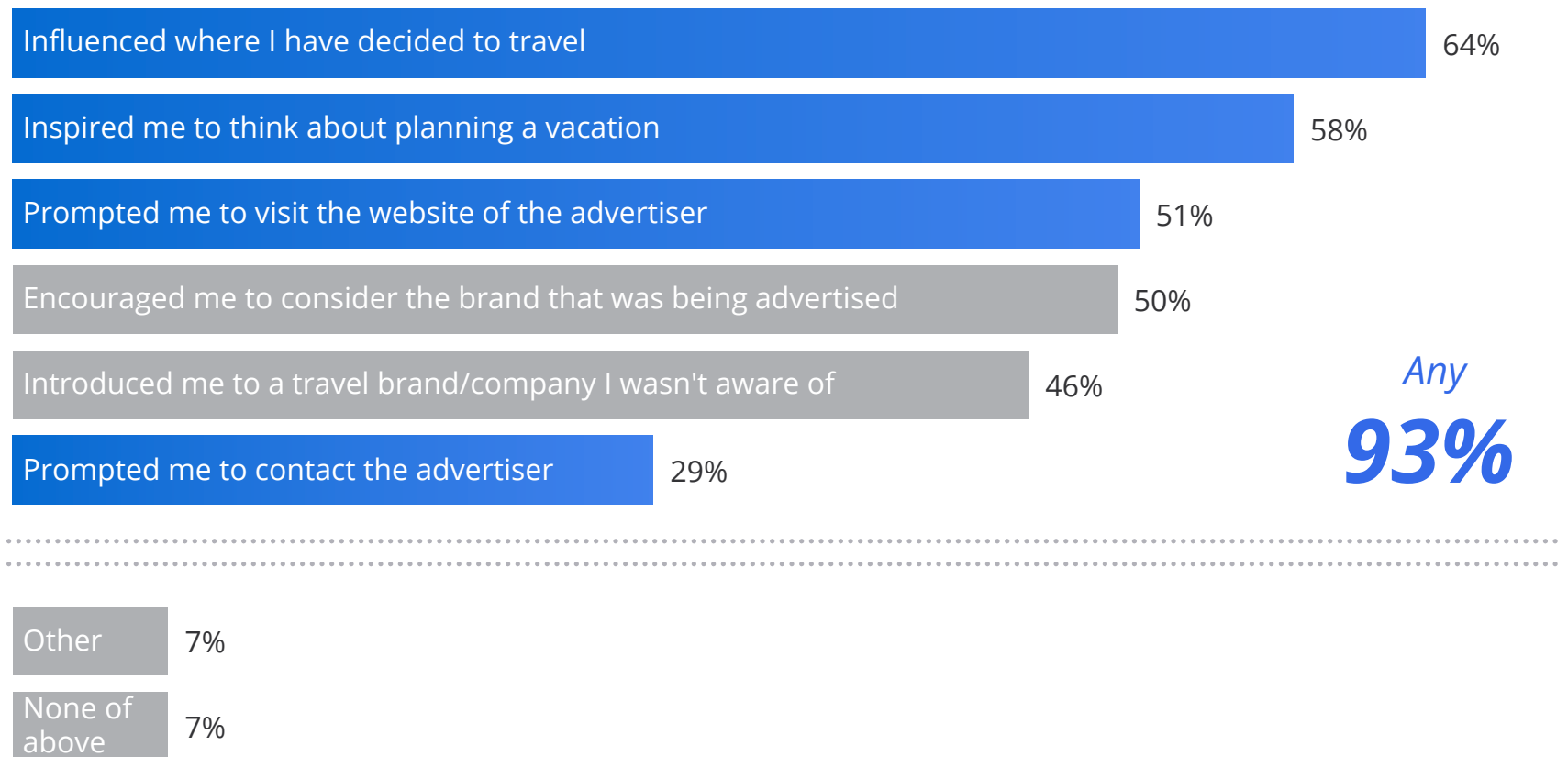
Affluent travelers value a variety of videos

Travel-related video content watched



Online video prompts affluent travel decisions

How video has influenced affluents





1 in 3

affluent travelers enjoys
filming videos of their travels

Affluents and flights,
hotels, car rentals
and cruises

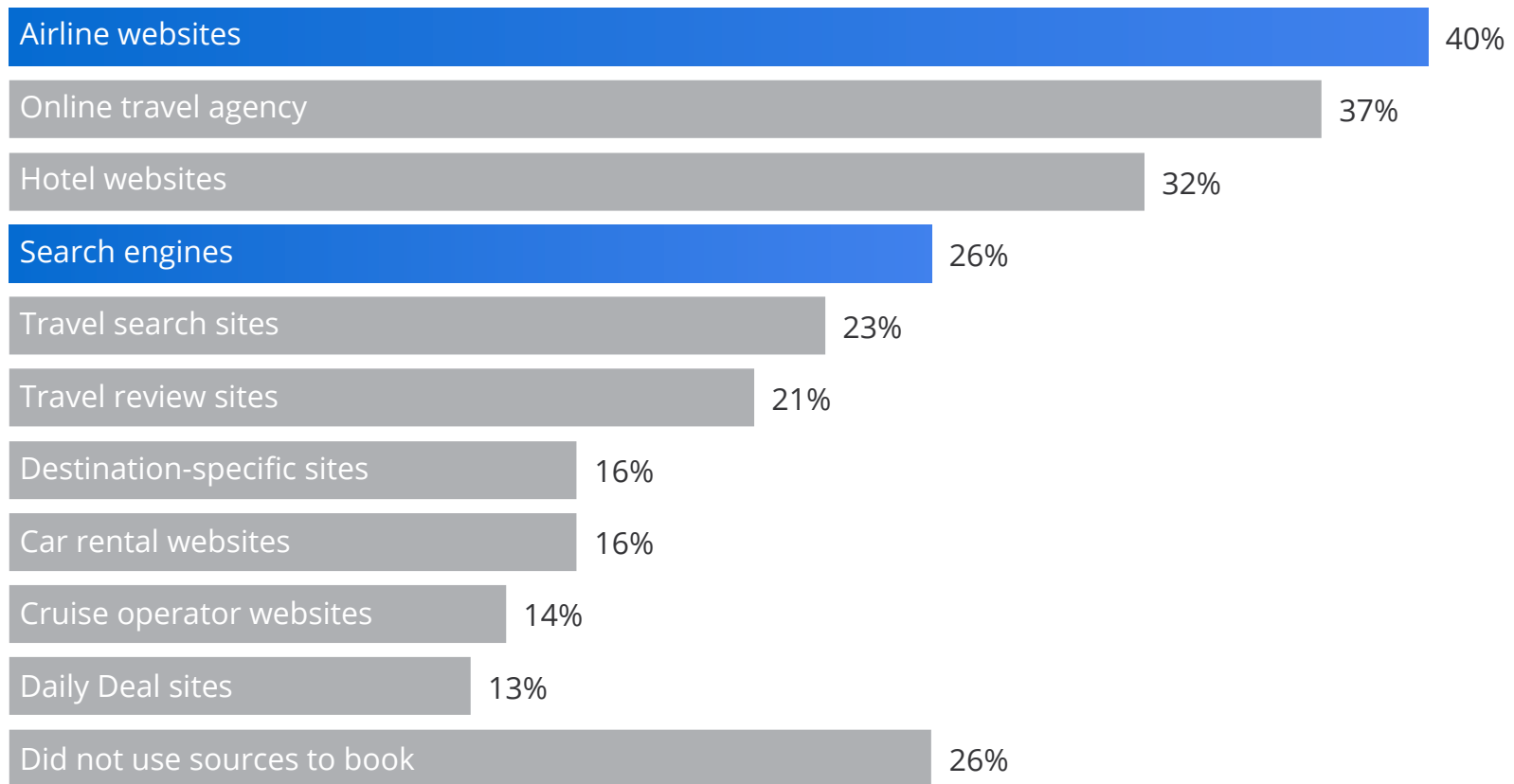
Affluent travelers frequently comparison shop for airline tickets

Frequency of online comparison shopping for airline tickets



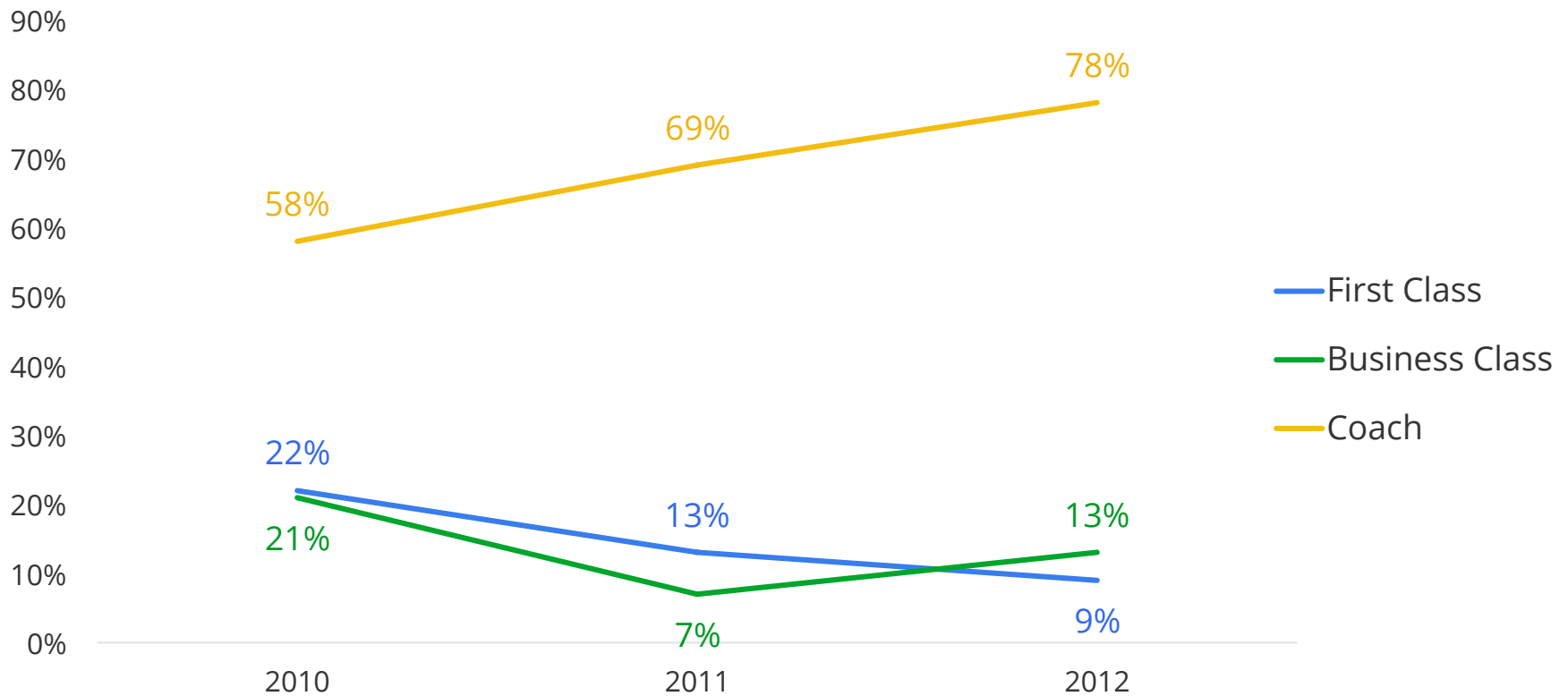
Affluent travelers look to airline websites to research travel packages

Top 10 online sources affluent travelers use to research packages



The number of affluent travelers typically flying coach has increased year over year

Type of seat typically purchased on a flight by affluent travelers



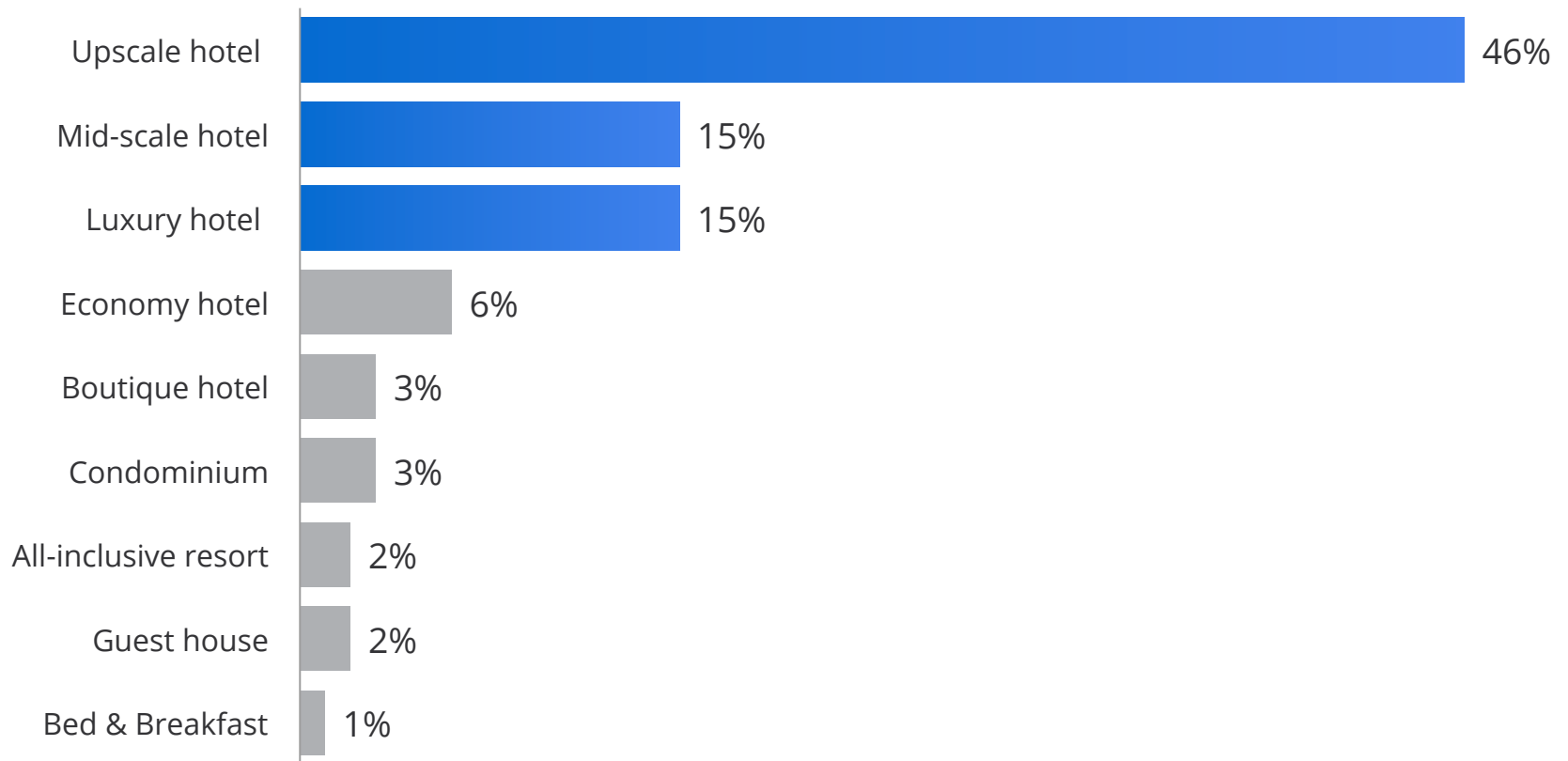
Affluent travelers frequently comparison shop for hotels

Frequency of online comparison shopping for lodging/ accommodations



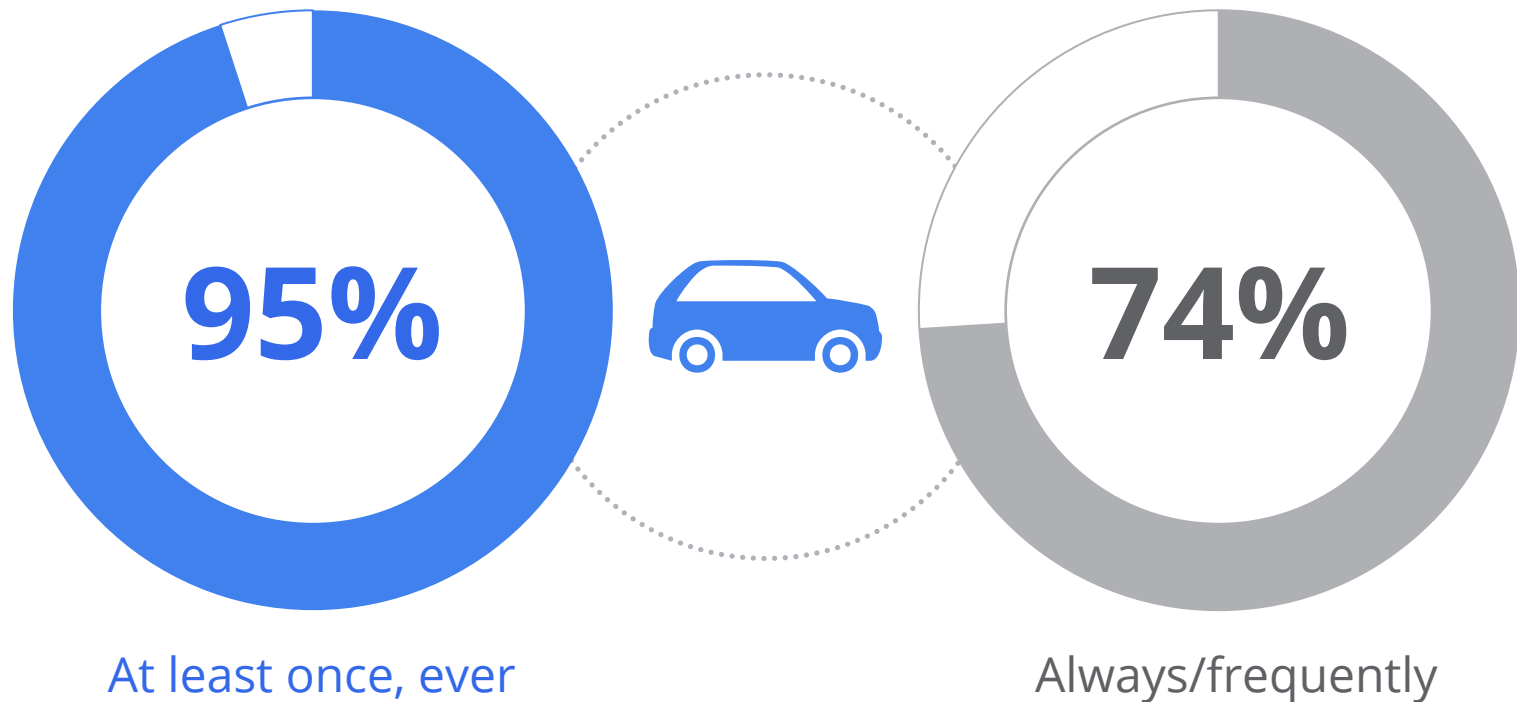
Upscale hotels remain the most popular type of accommodation among affluent travelers

Types of lodging typically used



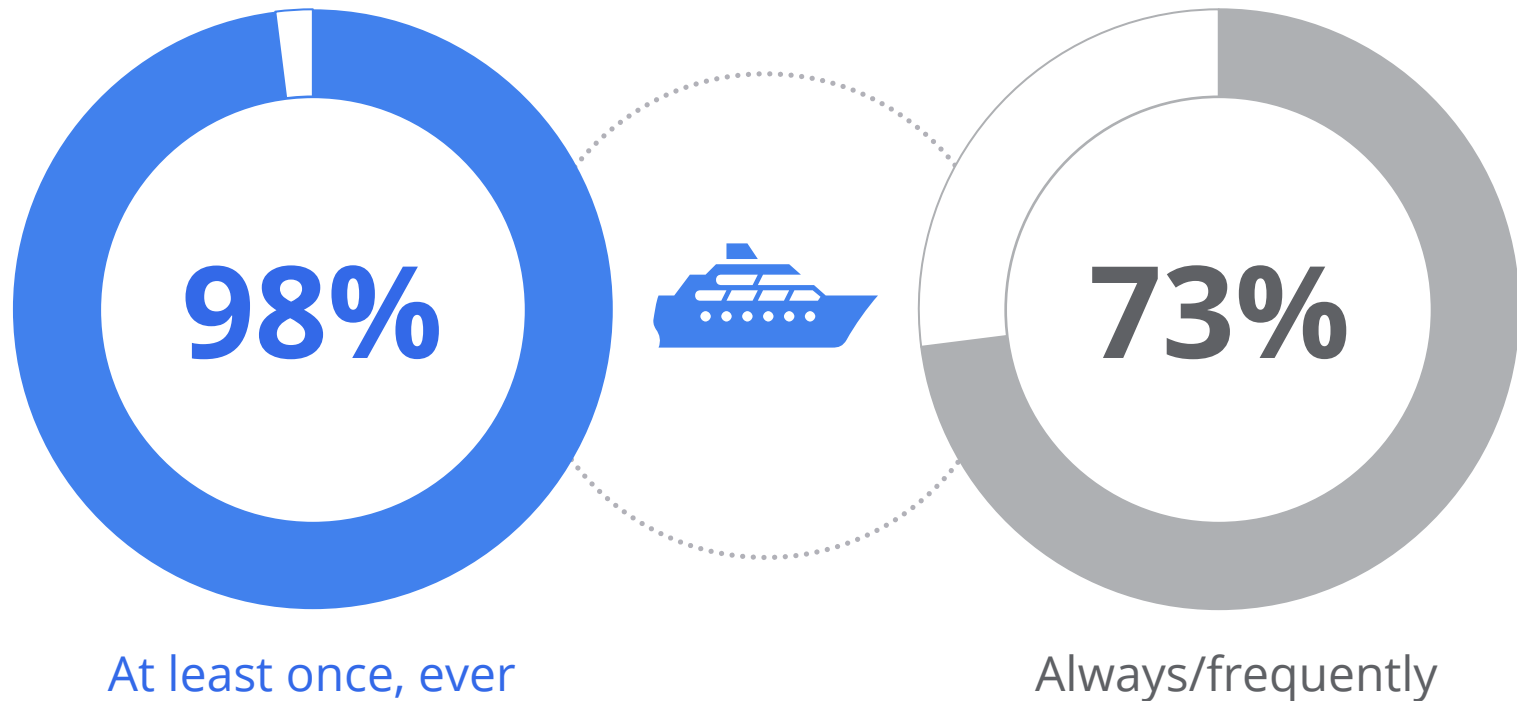
Affluent travelers frequently comparison shop for car rentals

Frequency of online comparison shopping for rental cars



Affluent travelers frequently comparison shop for cruises

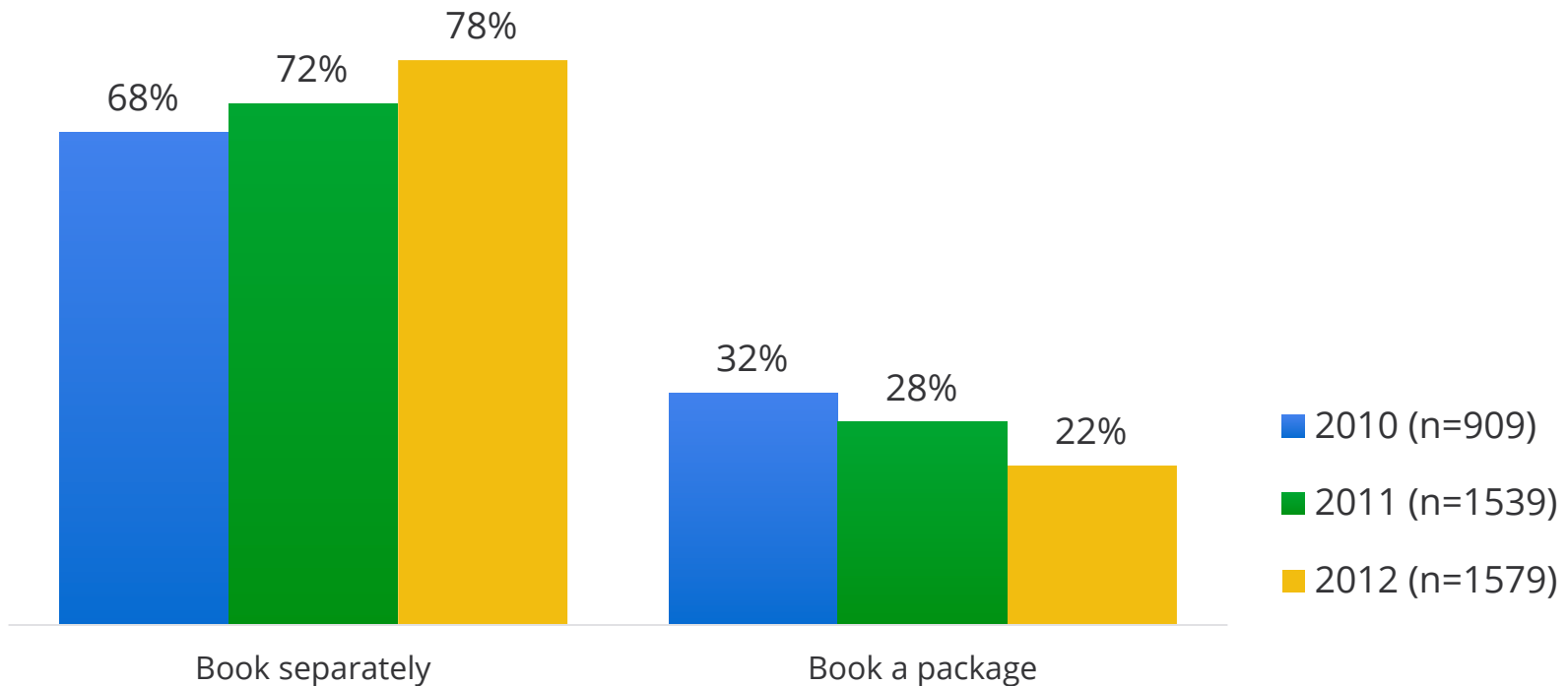
Frequency of online comparison shopping for cruise



Affluents and travel packages/deals

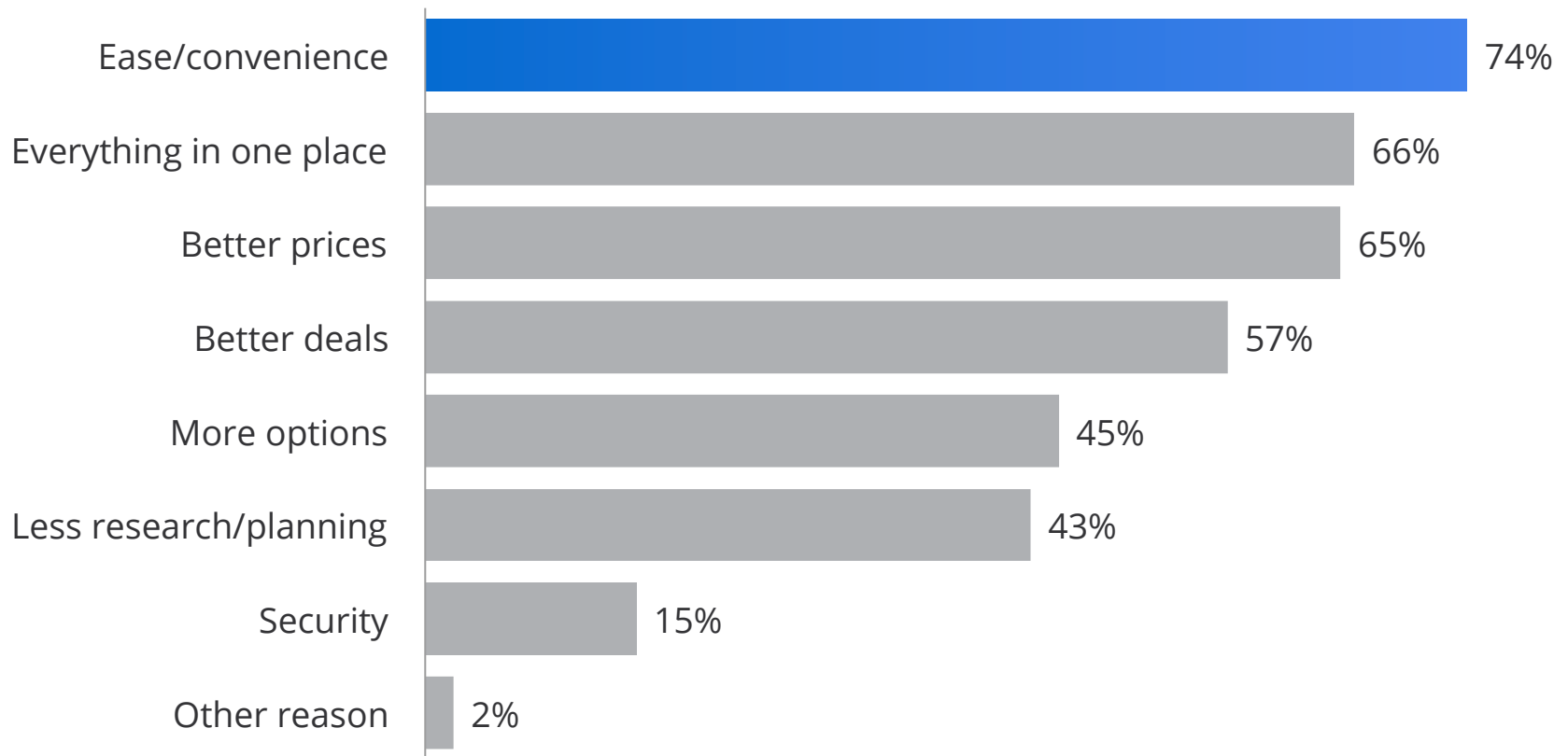
Affluent travelers opt to book trip components separately

Vacation booking method



OTAs are valued more for ease/convenience than for prices and deals

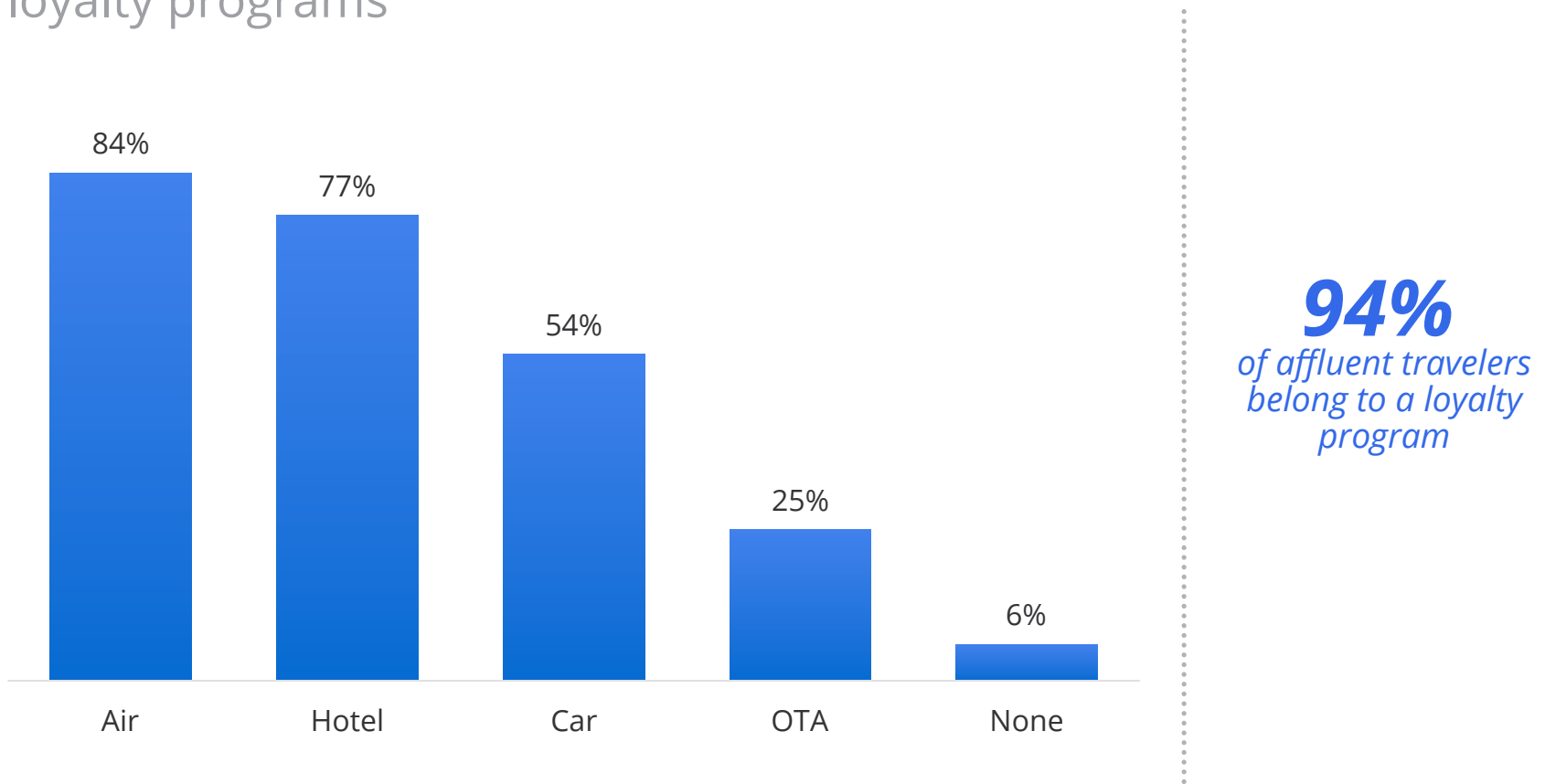
Reasons for using an OTA



Affluent travelers and loyalty programs

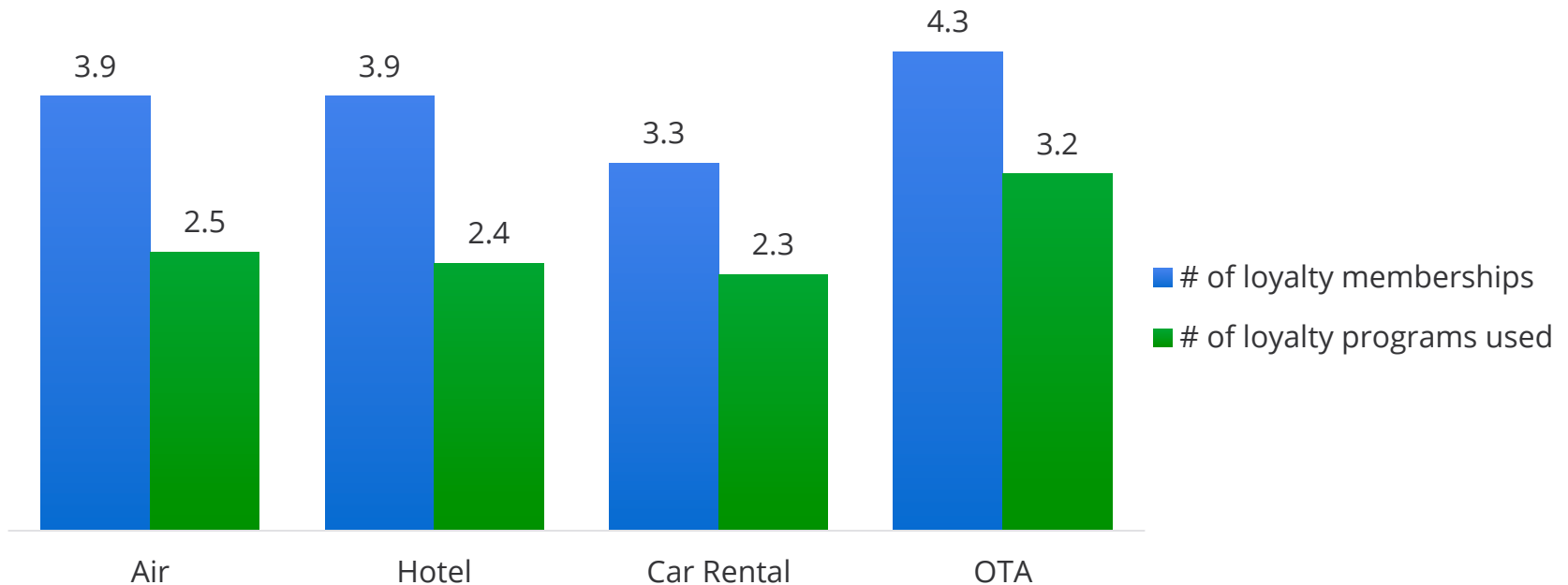
Nearly all affluent travelers belong to a travel loyalty program

Percentage of affluent travelers who belong to travel loyalty programs



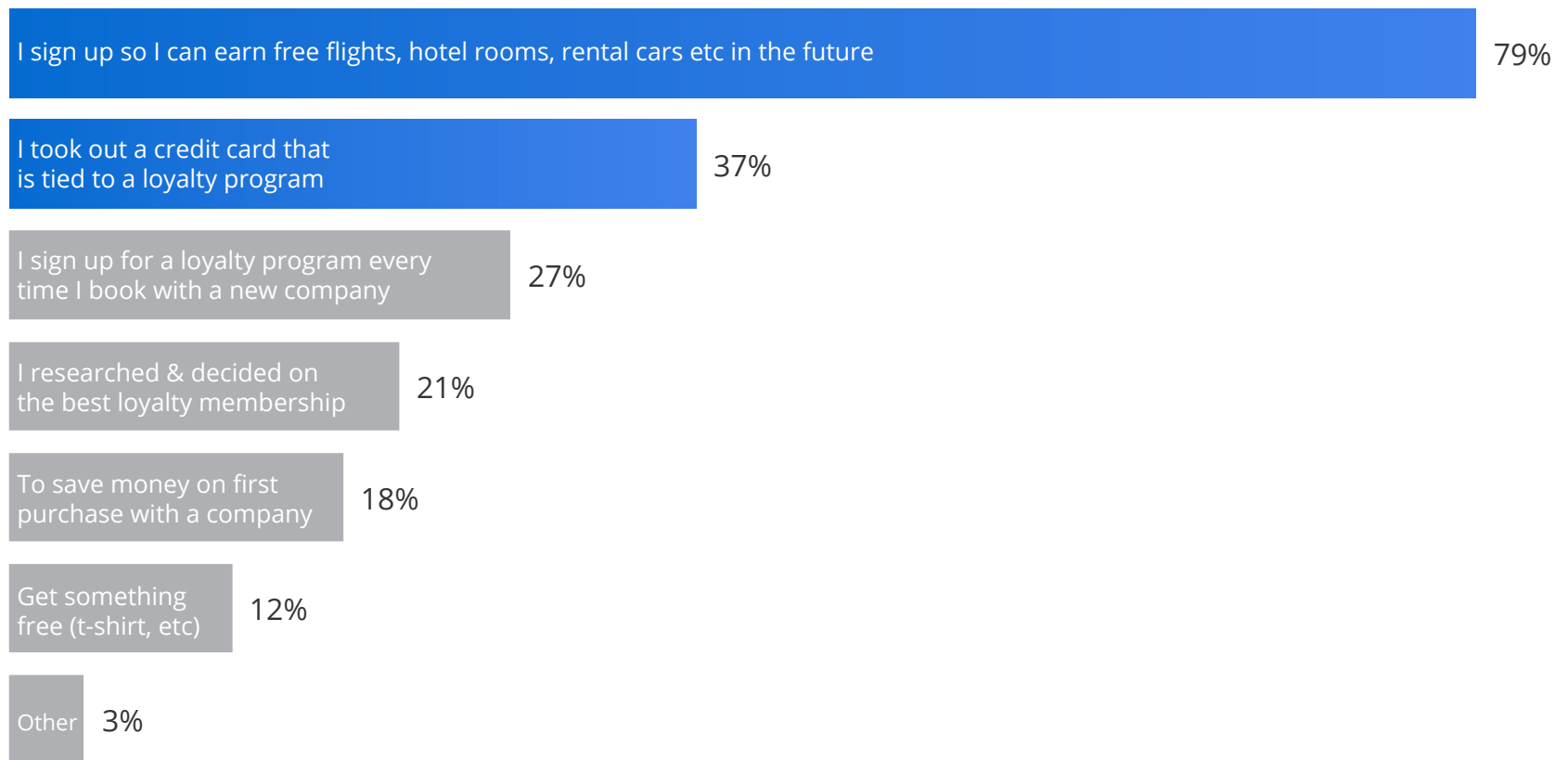
Affluent travelers enroll in and use many loyalty programs across all areas of travel

Average number of travel loyalty programs to which affluent travelers belong and use at least once per year



Affluent travelers are strongly motivated by free future benefits

Reasons for sign ups

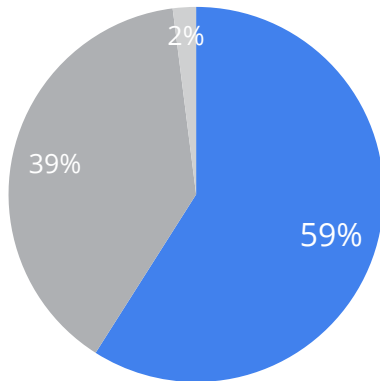


Affluents use loyalty memberships for both business and pleasure, maximizing their value

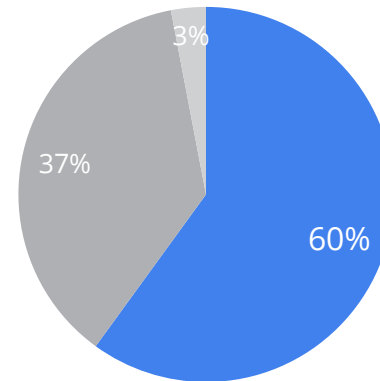
How affluent travelers use their loyalty programs



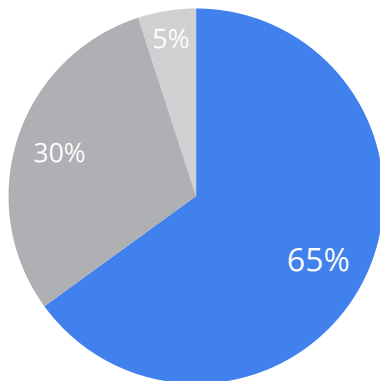
Airline



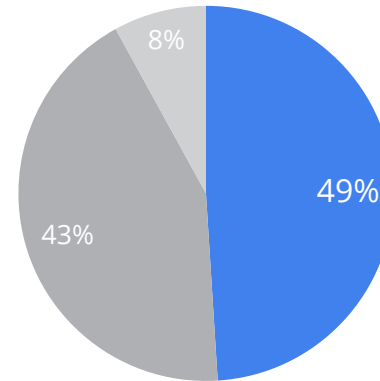
Hotel



Car rental



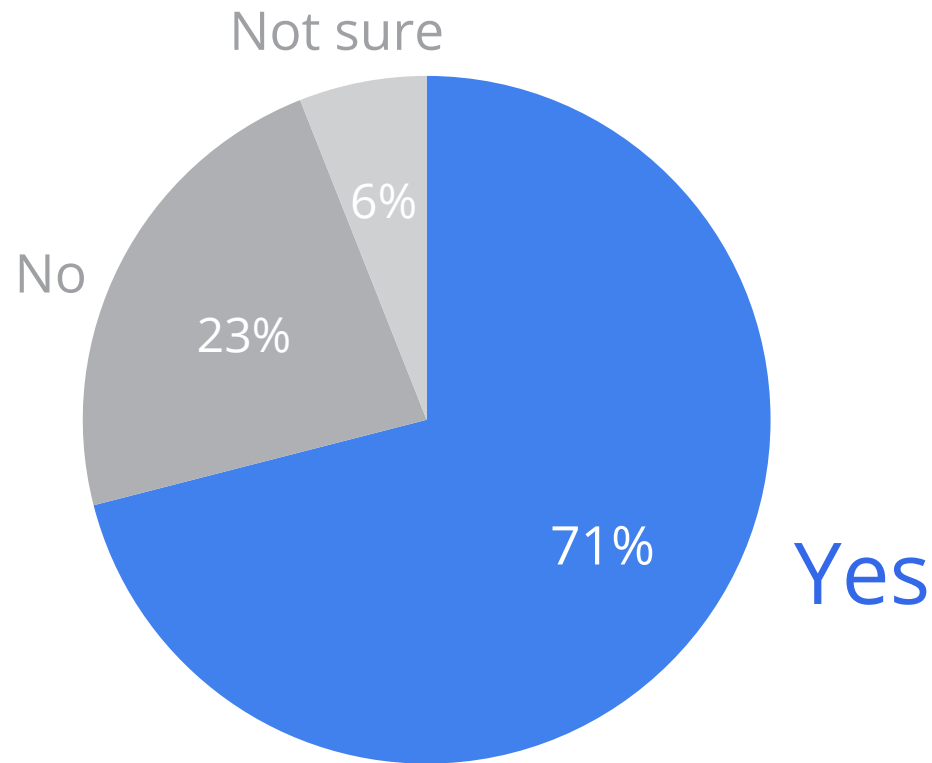
Online travel agent



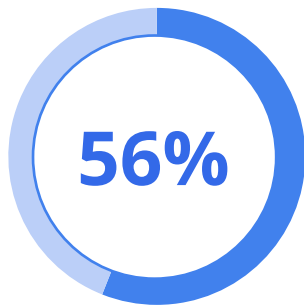
- Both
- Personal use
- Business use

Affluent travelers download apps of loyalty programs that they belong to

Downloaded loyalty program app

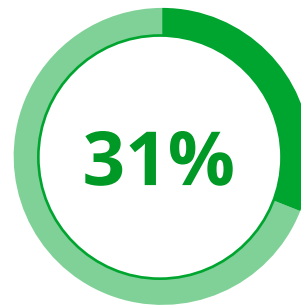


Most affluent travelers are loyal to programs that they belong to



Somewhat loyal

"I usually book with companies for which I have a loyalty/rewards membership but occasionally will book with another company if the price is better."



Very loyal

"I always book with companies for which I have a loyalty/rewards membership with, regardless of cost."



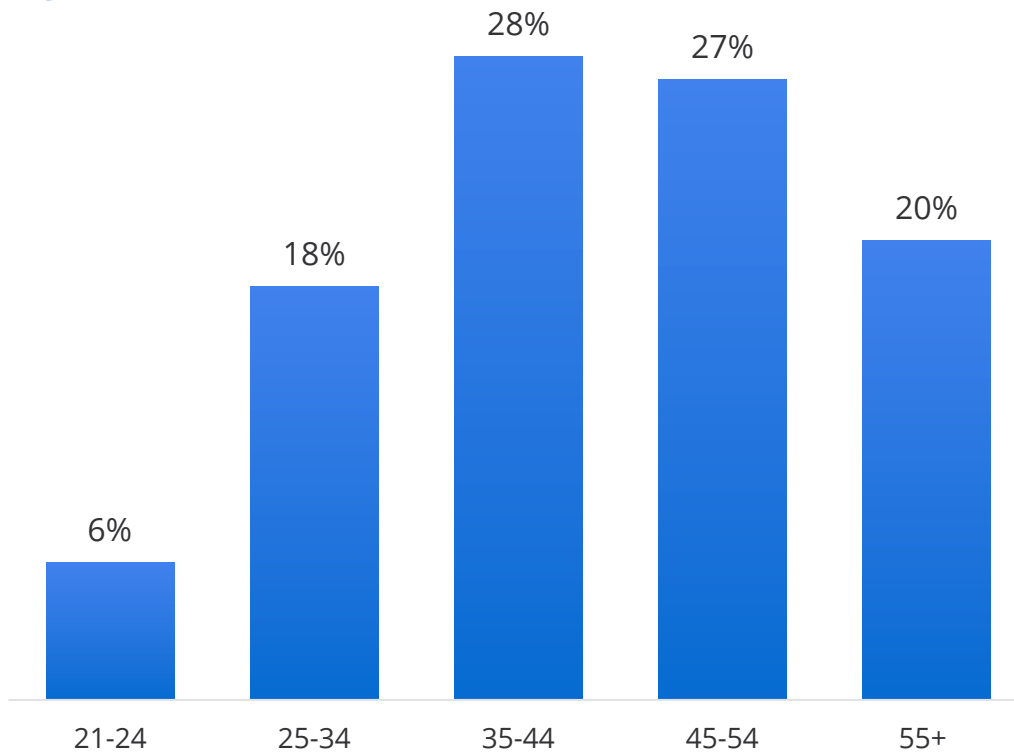
Not very loyal

"I will book with whichever company provides the best price for my travel regardless of what loyalty/rewards memberships I may have."

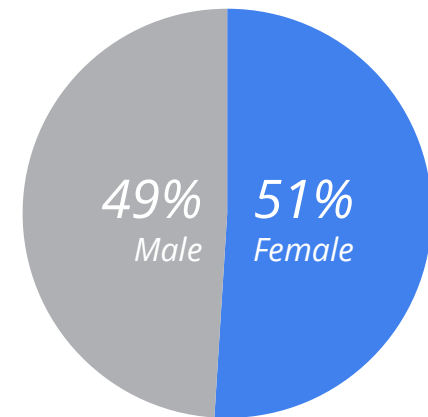
Demographics

Demographics of affluent travelers

Age

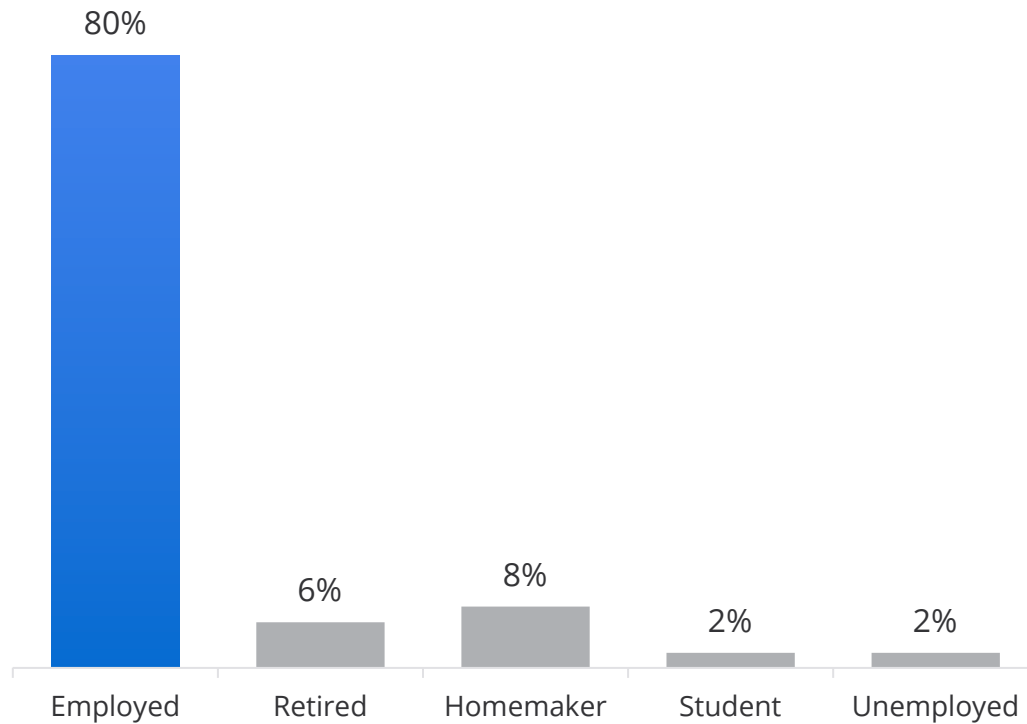


Gender



Demographics of affluent travelers

Employment



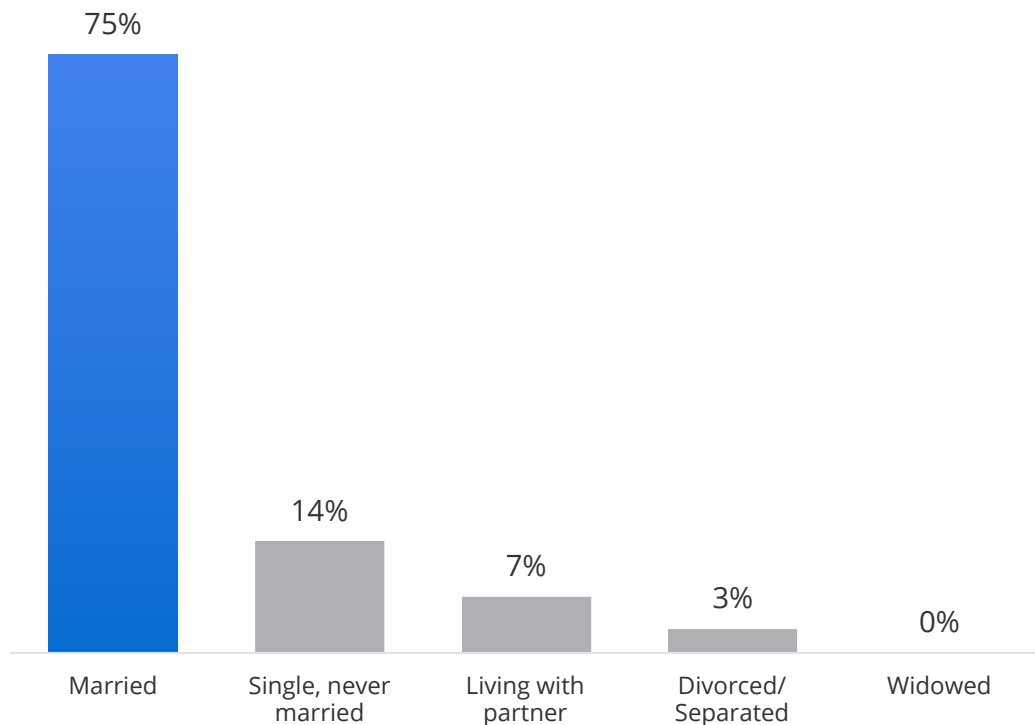
Average household income



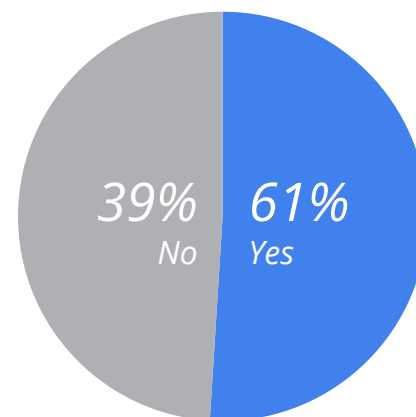
\$316,630

Demographics of affluent travelers

Marital status



Children ages 0-17



Demographics of affluent travelers

Ethnicity

