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Traveler's Road to Decision 2009: The Affluent Traveler

Google/OTX
U.S., August 2009

Objectives

Understand how affluent research and gather information throughout the travel decision-making process

- ✓ How will travel planning change in this economy?
- ✓ Does the Internet play a significant role in travel planning?
- ✓ Does the research process change by traveler type?
- ✓ Does online video influence the travel decision-making process?

Research Methodology

- Categories covered: General Travel, Hotel, Car, Air, Cruise, & Destinations
- Survey of 5,002 consumers who have traveled at least once for personal/business purposes in the past six months
- An augment of 1,500 affluent personal travelers was also recruited
- Partnered with OTX; interviews conducted 4/10 – 4/27

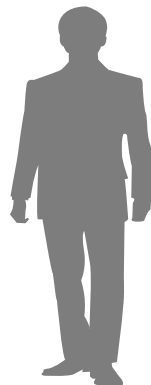
TRAVELER TYPES DEFINED



=

Personal Traveler

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



=

Business Traveler

has taken at least one trip 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 \$150K+

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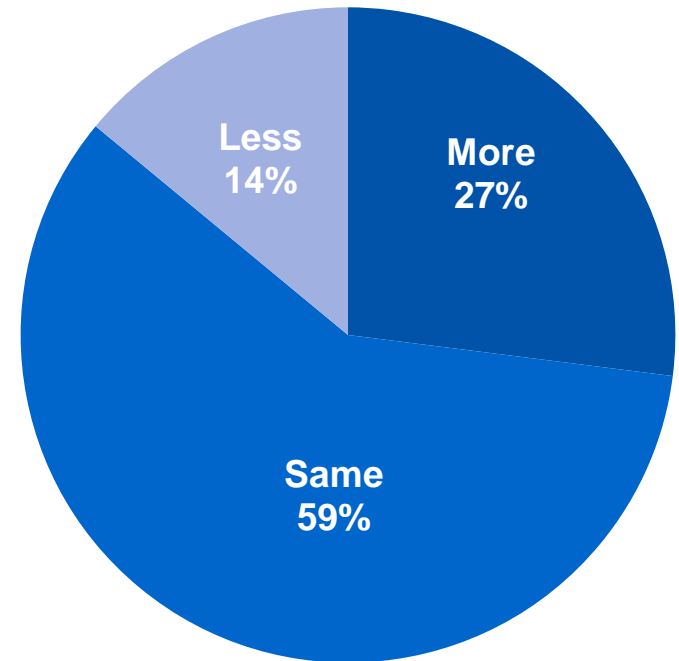
Personal Travel Outlook



Affluent Travel Outlook is Strong

86%

of affluent travelers plan to take the same amount or more personal trips in 2009 (vs. 2008)



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(Q22) Thinking about any personal/leisure trips you may take in 2009, would you say the number of trips you'll take will be... (n=1895)

However, Both Personal & Affluent Travelers Will Adjust their Booking Behavior

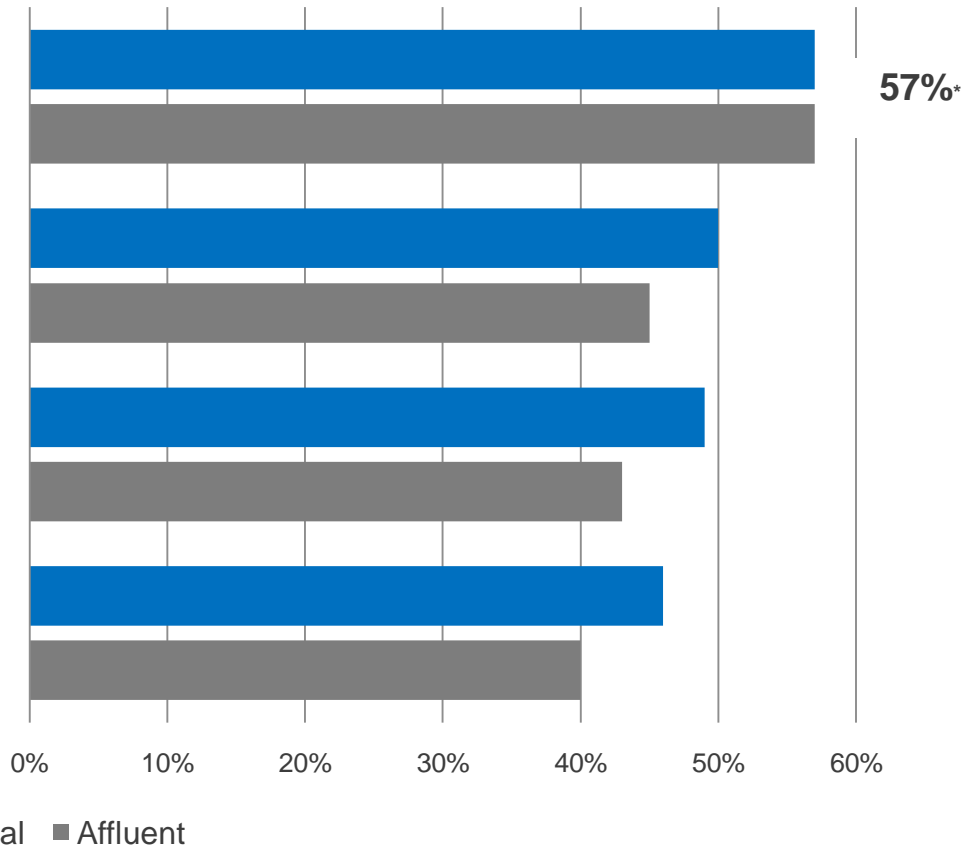


I plan to spend more time shopping around/researching before booking travel because of the current state of the economy

I plan to take more "mini-vacations" (e.g. long weekend trips) than longer (1-2 week) vacations like I have in the past

I will only travel if I can find a good deal

I plan to take more of a "wait and see" approach rather than book travel in advance



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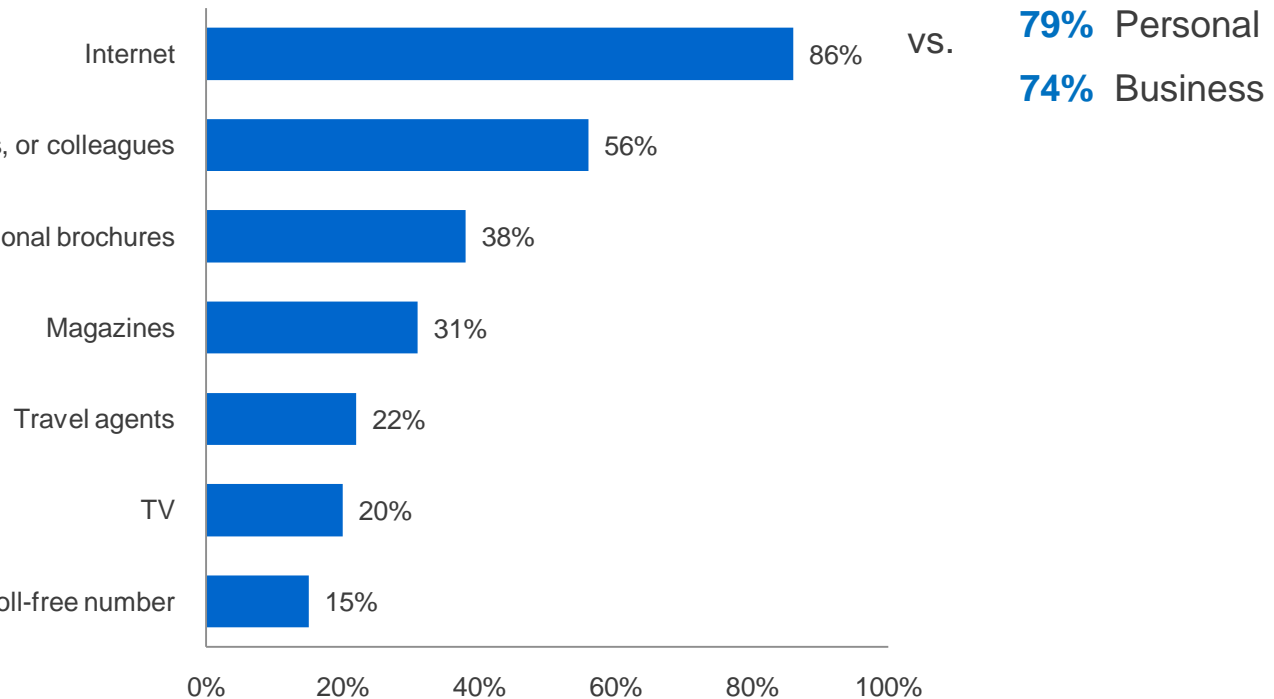
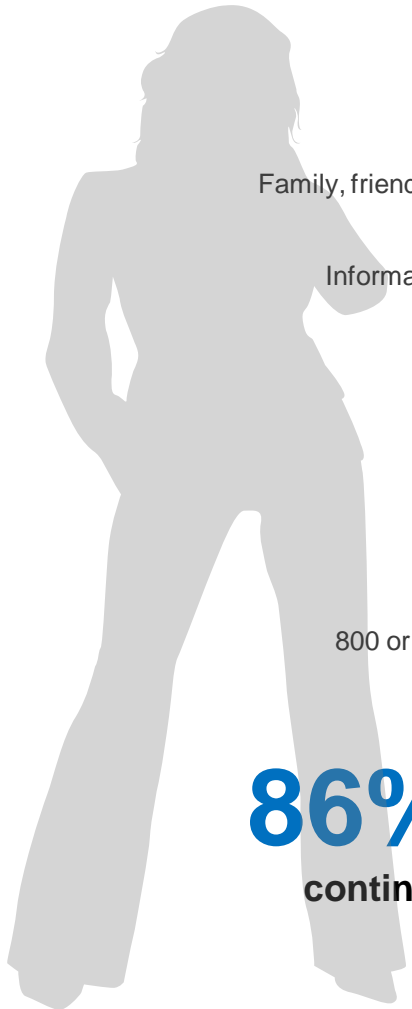
*Top 2 box summary (Q23) Using the scale below, please indicate how much you agree or disagree with each of the following statements about traveling for personal/leisure purposes in the next year. (n=4826 Leisure; n=1895 Affluent)

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The Role of the Internet in Travel Planning



Affluents are Even More Likely than Non-Affluent Travelers to Use the Internet for Trip Planning



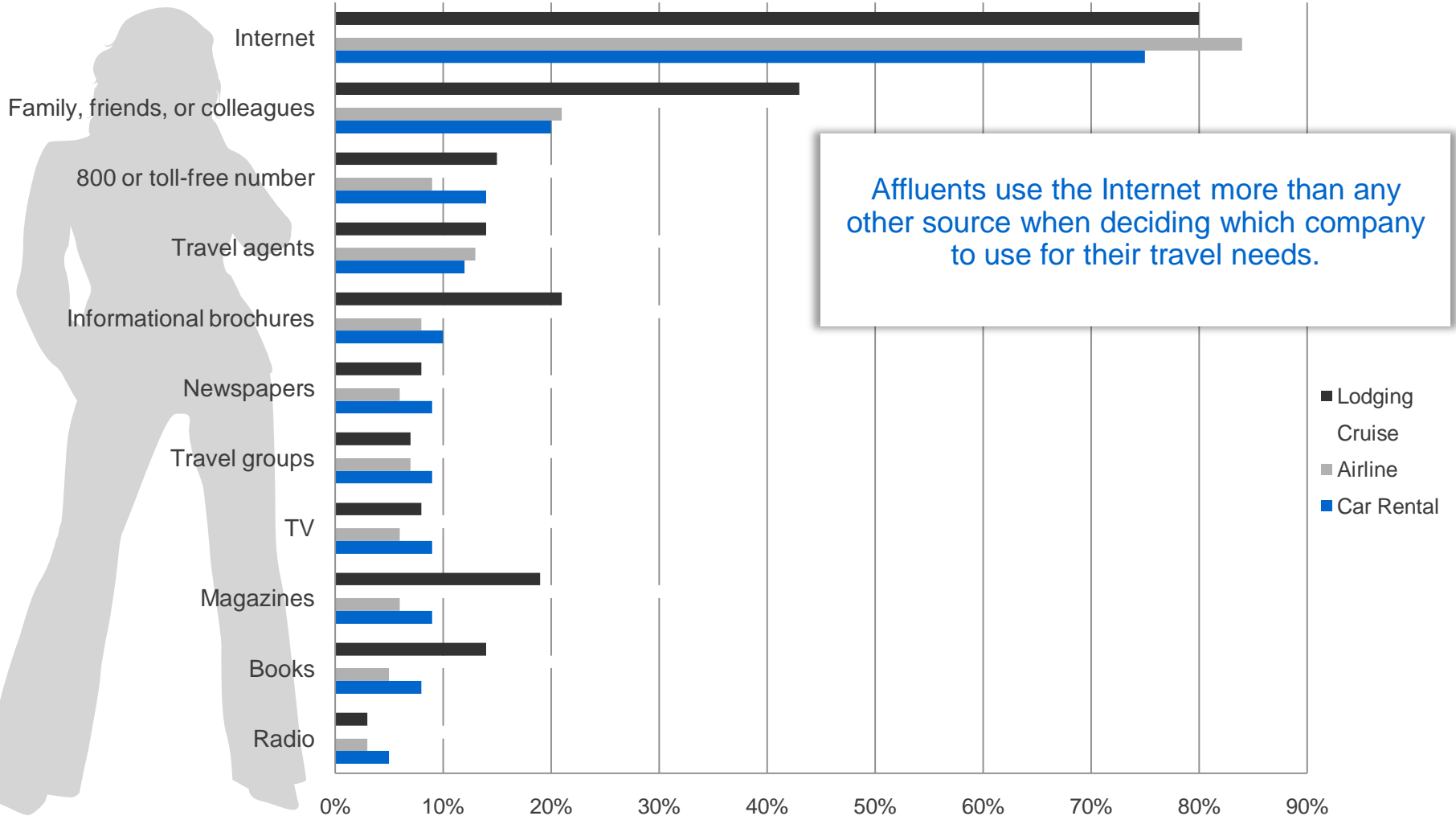
86% use the internet when planning travel and the same amount plan to continue to use it in the future, though they plan to use other sources less

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(Q7) Which of the following sources do you typically use to plan personal vacations/business trips? (n=1665)

(Q14) Which of the following sources of information are you likely to use the next time you plan a personal vacation/business trip?

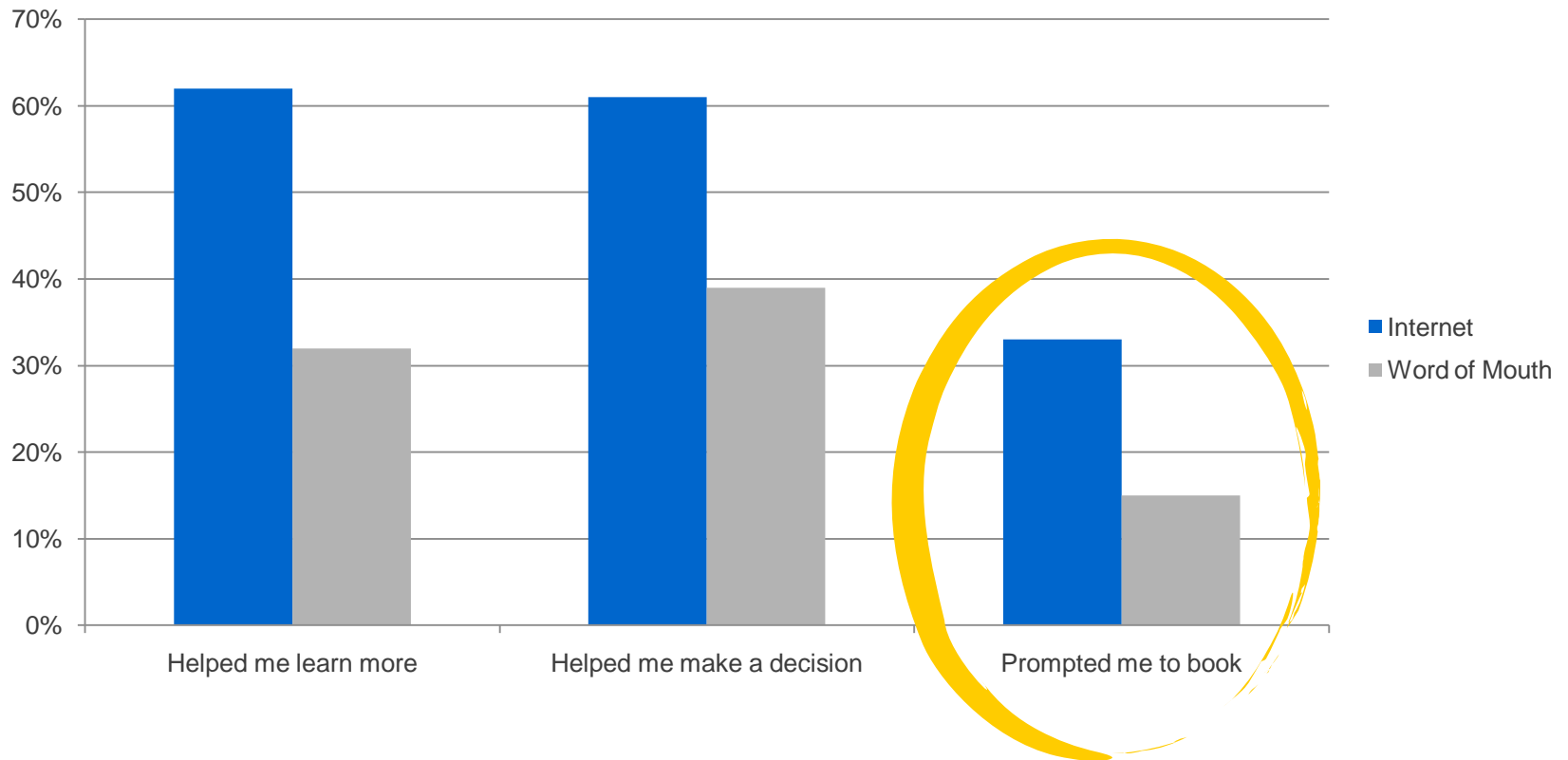
Affluents Use the Internet to Make Booking Decisions Across all Travel Components



(QR1/A1/H1/W1) Which of the following sources, if any, do you typically use to decide which company to rent a car from/airline/lodgings to use/cruise to book for personal/business trips? (n=2942)

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The Internet is Used More than Any Other Source Throughout the Purchase Cycle



The Internet prompts more than **2x** the bookings as the next highest source, word of mouth



Base: Used Internet as Source to Plan Trips (Q8) Listed below are some of the sources that you typically use to plan personal vacations/business trips. Please indicate the statements which you feel apply to each source of information. (n= 1586)

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User Reviews Influence the Purchase Decisions of Affluents Even More than Non-Affluent Travelers



52%*

vs.

41% Personal
50% Business

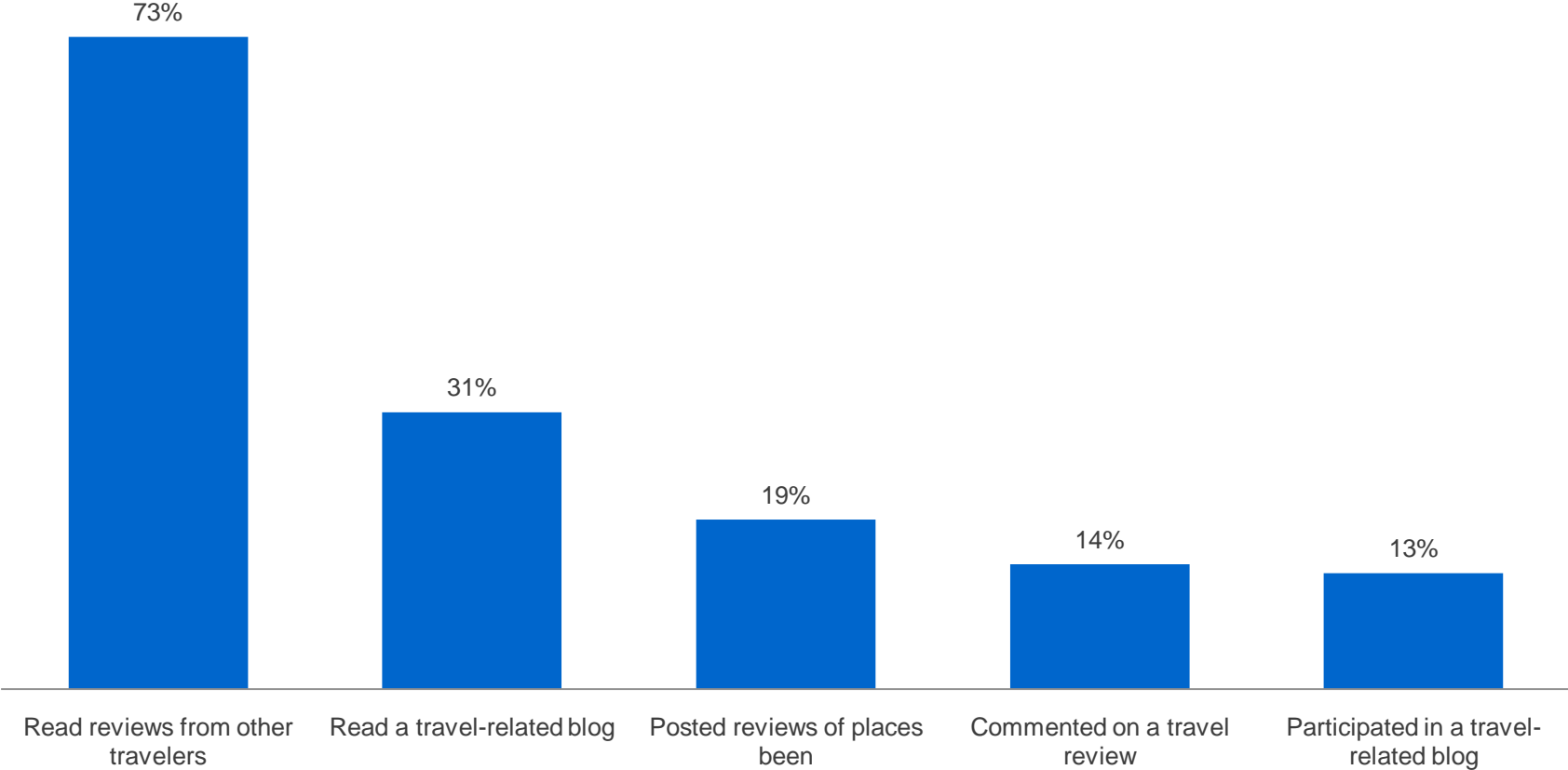
“I have made travel plans based on the reviews and experiences of others”

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*Top 2 box summary (Q21) Here are some (more) statements that may or may not describe your attitudes and opinions related to travel. Please indicate how much you agree or disagree with each statement. (n= 1910)

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When it Comes to Reviews, Affluents are Much More Likely to Be an Observer than a Contributor



(Q4) Which of the following have you done online in the past 6 months?

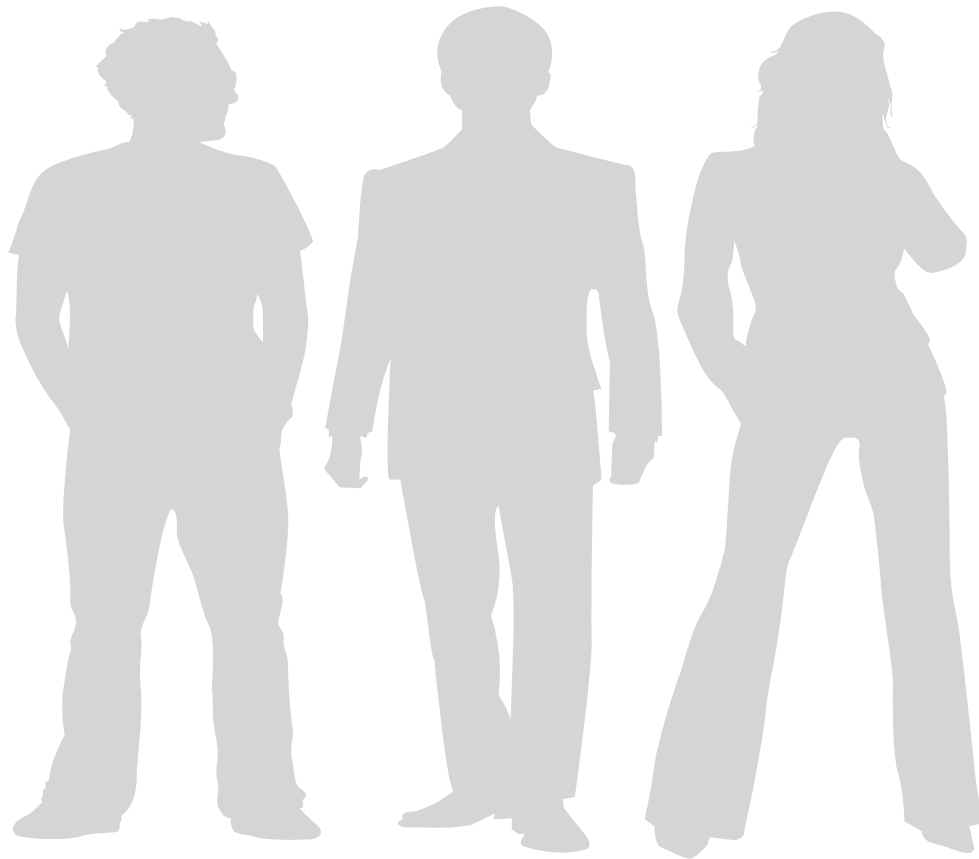
Unlike Business & Personal Travelers, Affluents Slightly Prefer Expert Opinions Over their Peers

I trust the content of.... (top 2 box summary)	Affluents
Trip reviews from people like me	63%
Trip reviews from experts	66%

The Importance of Search Engines in Travel Planning



Search Engines are Useful in Trip Planning



73%*

Nearly 3 out of 4 Personal, Business, & Affluent Travelers will attest that search engines are either “extremely” or “very” useful in trip planning

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Source: Google & OTX, The Traveler's Road to Decision; June 2009

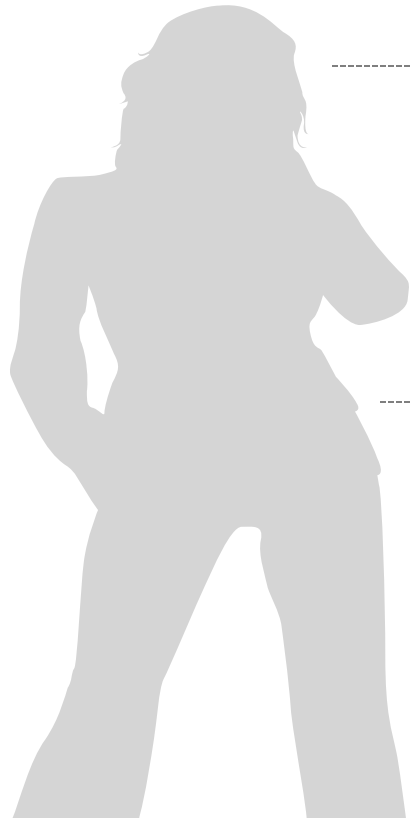
Base: Internet Users (for travel planning)
(Q11) How useful are search engines (e.g., Google, Yahoo) to you while you plan personal vacations/business trips? *Top 2 box summary

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The Growing Role of Online Video in the Travel Planning Process



More Travelers are Watching Videos Online – Including Travel Specific Content



Watch videos on the Internet at least once a week:

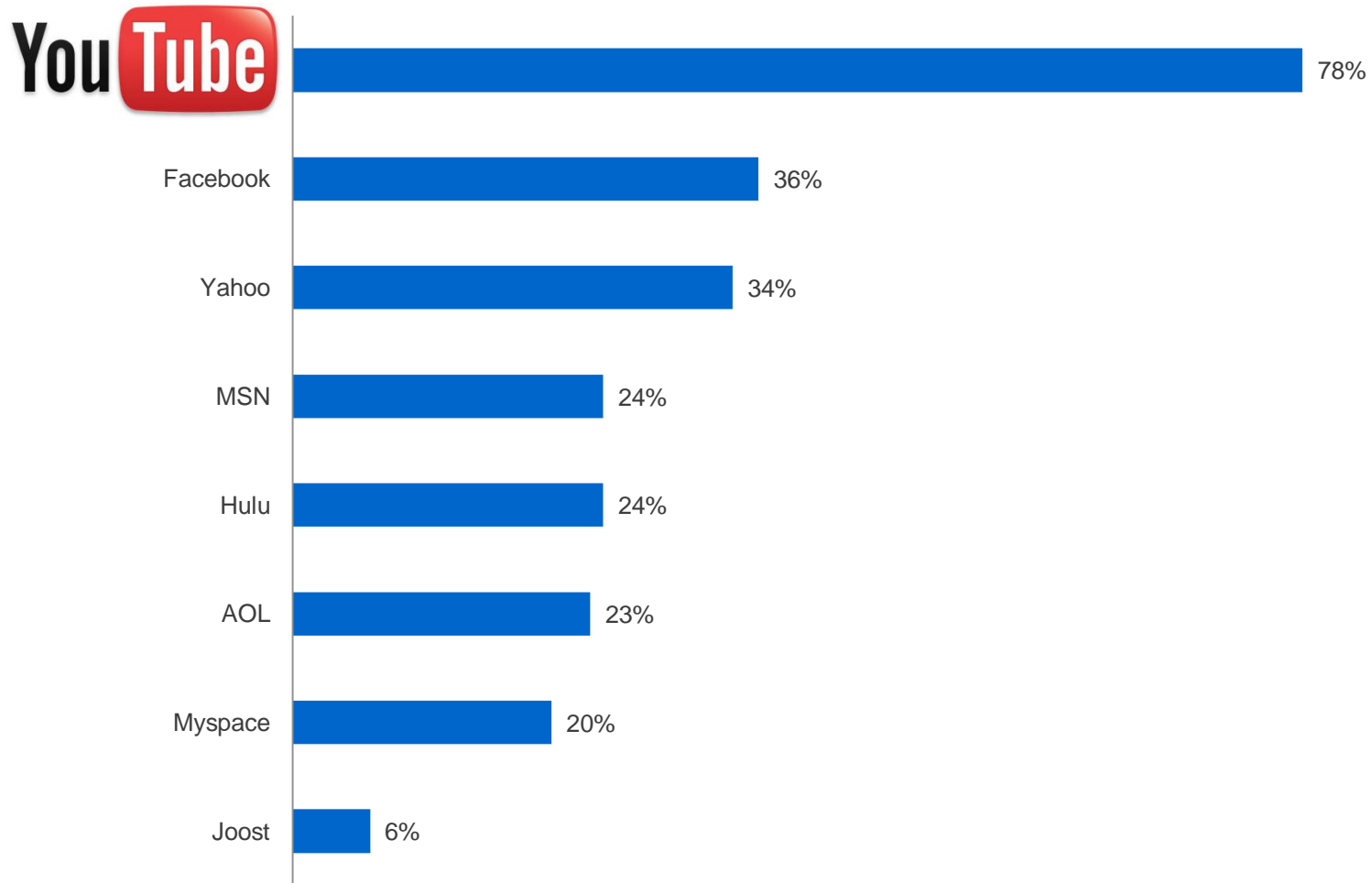
53%

Watch TRAVEL videos on the Internet:

49%

In a similar April 2008 study, only 41% of travelers watched online video at least once a week and only 15% of online video viewers watched travel related videos

For Affluent Travelers, YouTube is Far and Away the Most Popular Place to Watch Videos Online



Online Video is Used Throughout the Planning Process

AFFLUENTS*

65%

When thinking about taking a trip

52%

When thinking about what type of trip to take

66%

When choosing a destination

70%

When looking for activity ideas

62%

When deciding on accommodations, transportation, etc.

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*Top 2 box summary

Base: Watch travel videos online

(Q5) At what points in your travel planning process do you view videos online?

(n=667)

Unlike Reviews, Affluent Travelers Prefer Travel Videos Made by “People Like Them” Over the Experts

I trust the content of.... (top 2 box summary)	Affluents
Videos made by people like me	50%
Videos from hotels, airlines, cruises, etc.	42%

Uploading Their Own Experiences is Becoming More Commonplace



12%

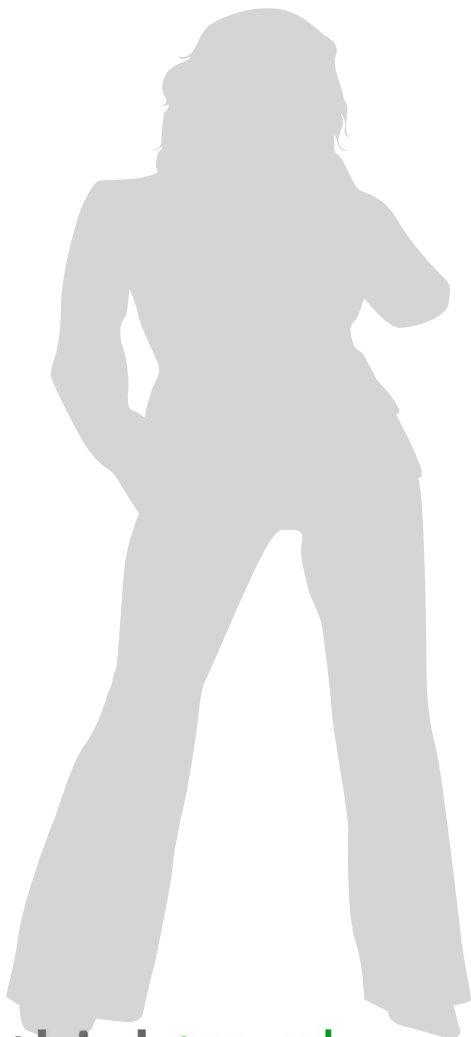
“I have uploaded a travel video in the past 6 months”

In a similar April 2008 study, only 4% of travelers surveyed had uploaded their own travel video in the previous 6 months

Profile of the Affluent Traveler



Profile of the Affluent Traveler



Mean Income: \$237K

Marital Status: 84% Married/Living With Partner

Kids: 51% None; Mean: 1

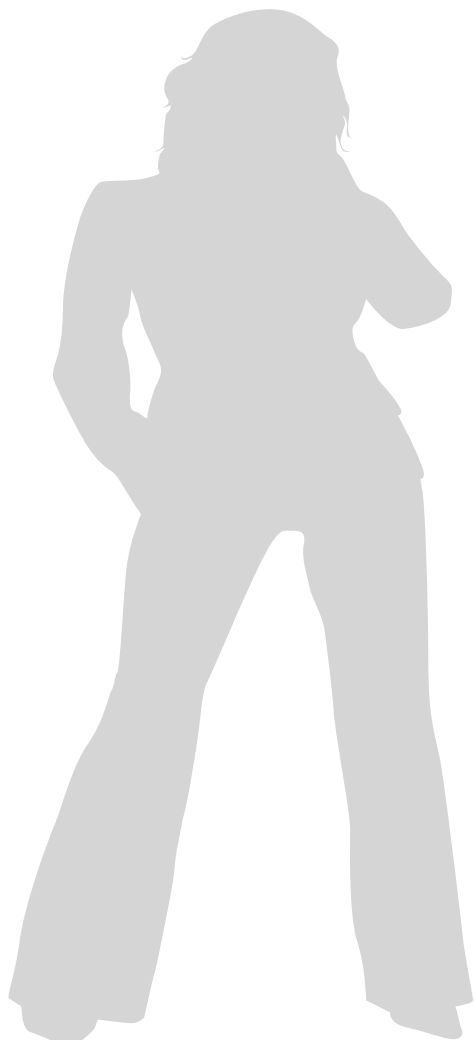
Education: 73% College Grad+

Employment: 77% Employed

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Profile of the Affluent Traveler



	Frequency
Stay at least one night in a hotel, resort, time-share, or other lodging accommodations	3.24
Travel to your destination by air	2.7
Travel to your destination by a car you own (not a rental)	2.27
Rent a car once you've arrived at your destination	1.88
Stay with friends or family, rather than a hotel	1.71
Take a guided tour	1.23
Travel to your destination by rental car only	1.08
Take a cruise	0.99
Travel to your destination by train	0.95
Travel to your destination by bus	0.86

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(Q19) Considering all the personal vacations/business trips you took in the past 6 months, how many times, if at all, did you do each of the following? (n=1665)

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