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# Traveler's Road to Decision 2009: The Affluent Traveler

Google/OTX  
U.S., August 2009

# Objectives

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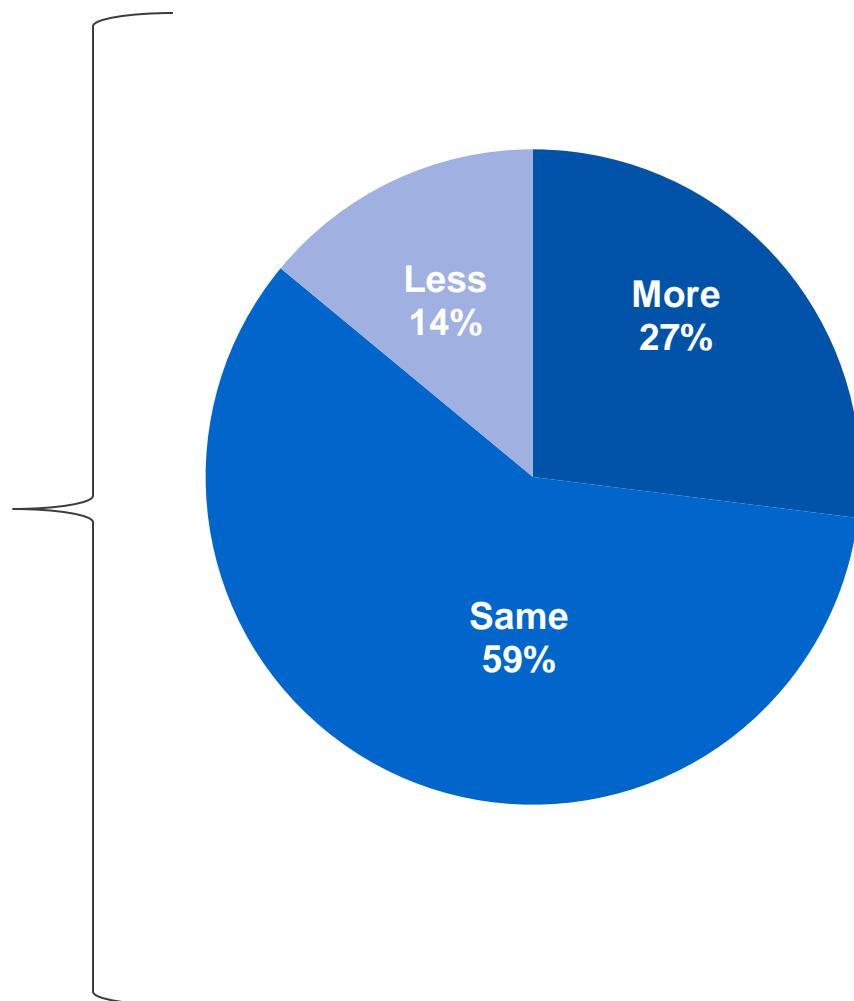
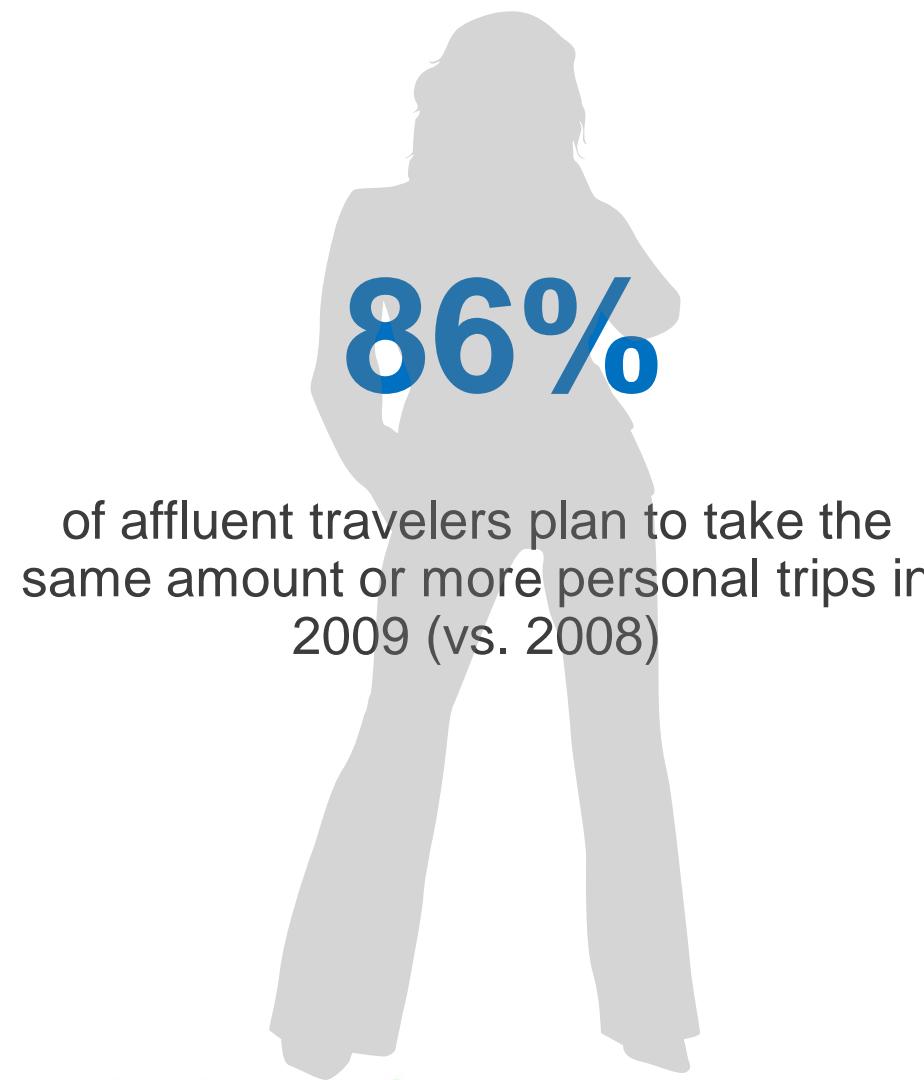
Source: Google & OTX, The Traveler's Road to Decision; June 2009

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# Personal Travel Outlook



# Affluent Travel Outlook is Strong



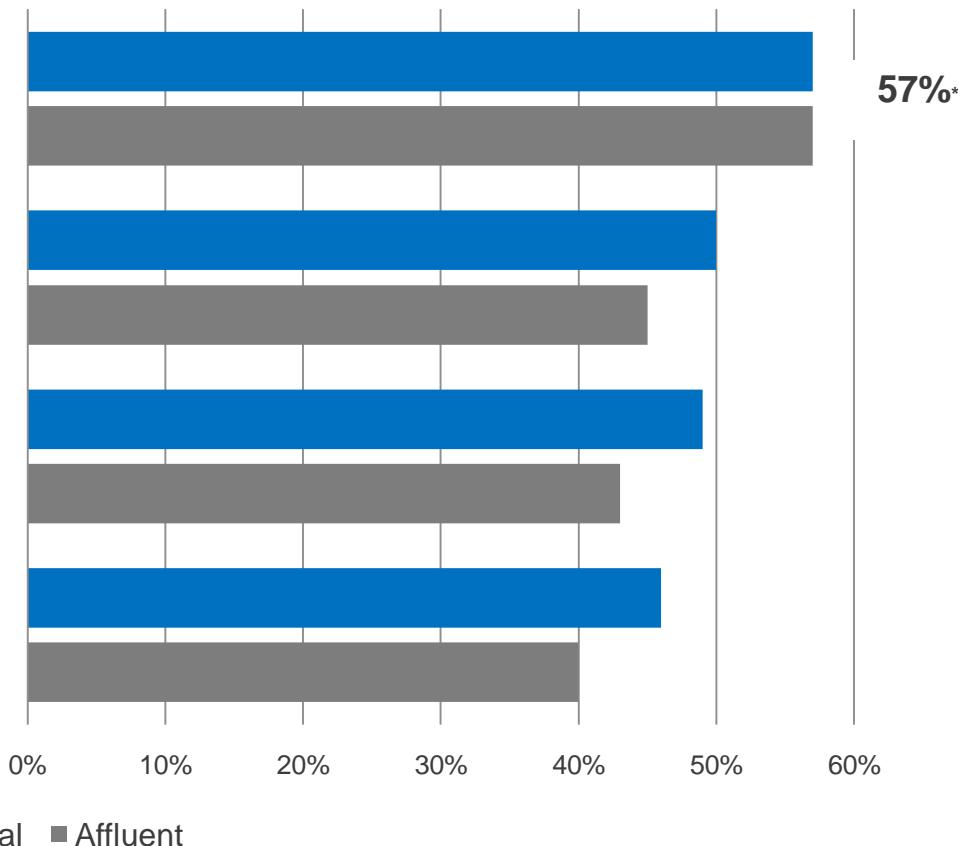
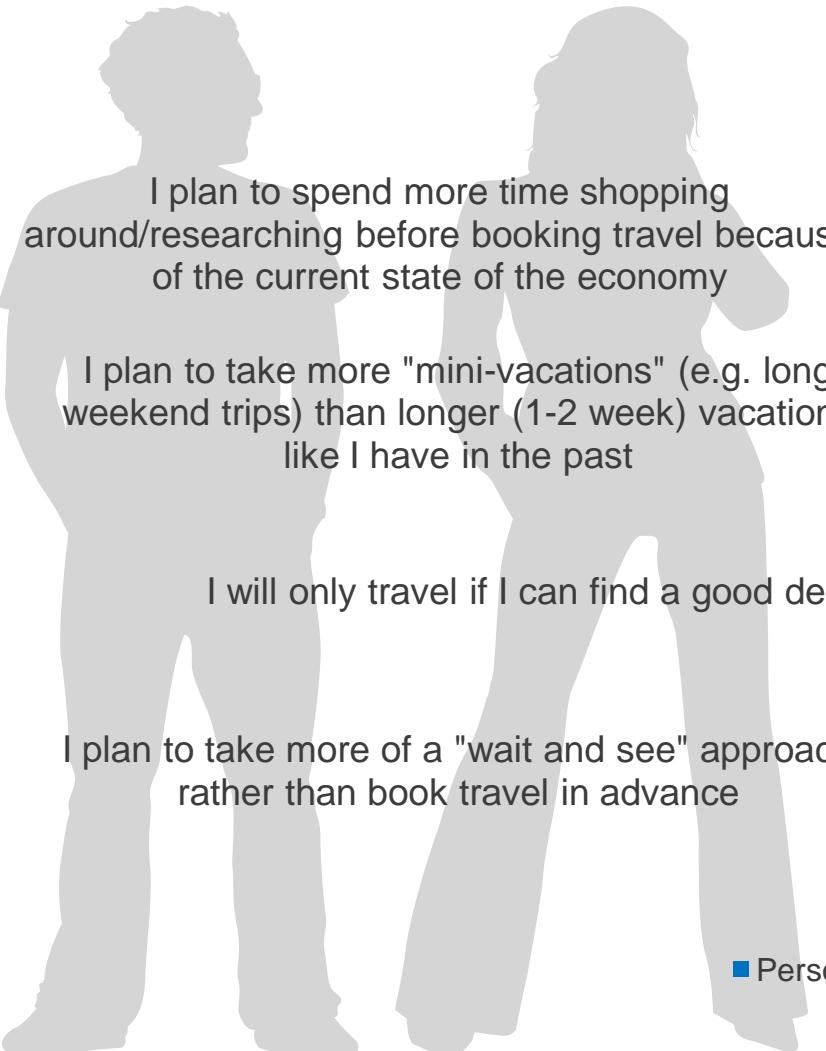
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Source: Google & OTX, The Traveler's Road to Decision; June 2009

(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)

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

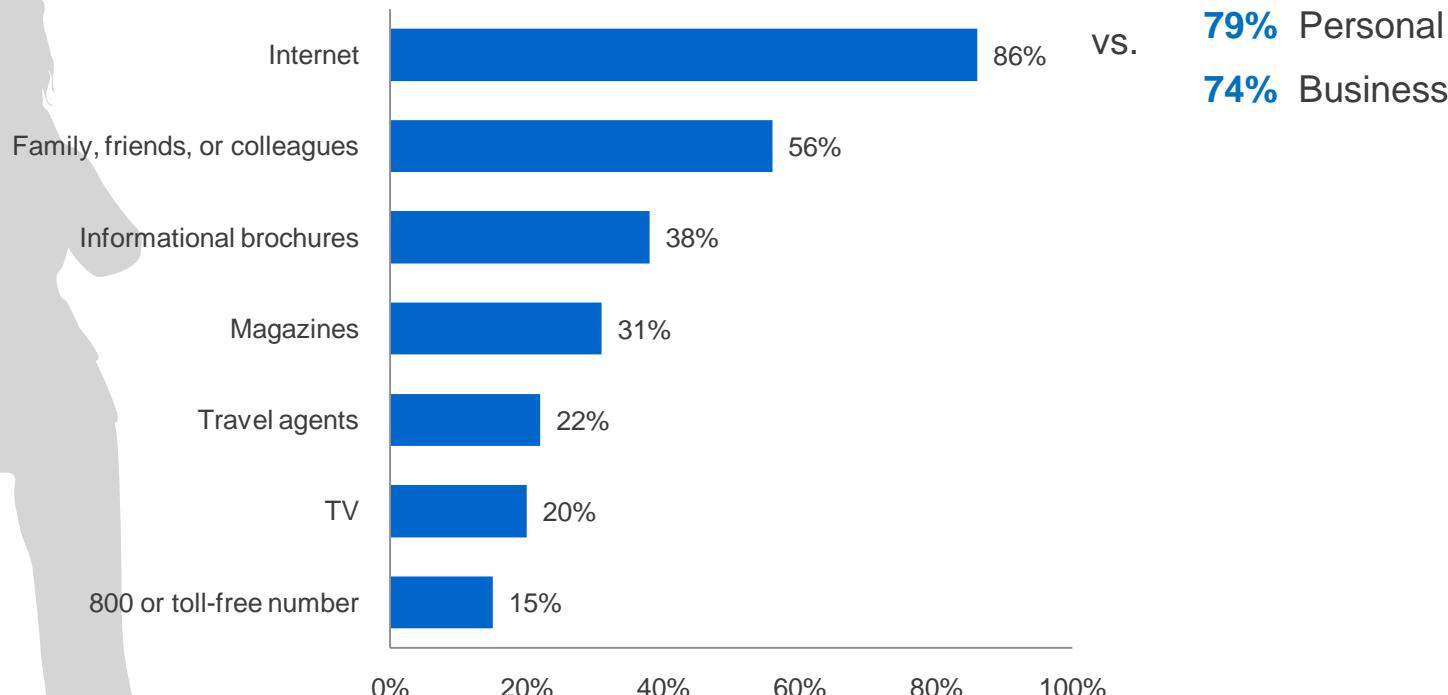


\*Top 2 box summary  
(Q23) Using the scale below, please indicate how much you agree or disagree with each of the following statements about traveling for personal/leisure purposes in the next year.  
(n=4826 Leisure; n=1895 Affluent)

# The Role of the Internet in Travel Planning



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

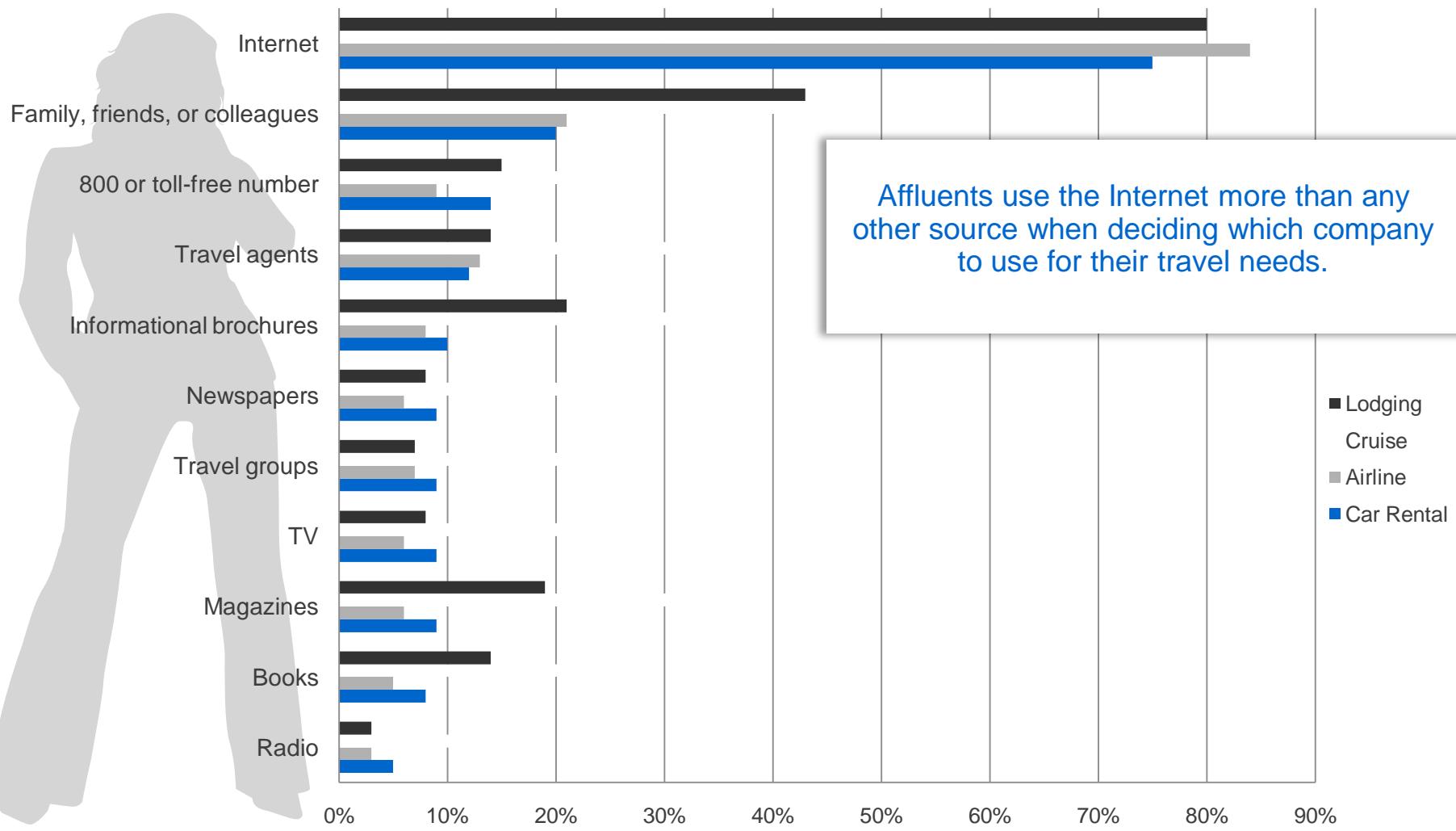


**86%** use the internet when planning travel and the same amount plan to continue to use it in the future, though they plan to use other sources less

(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



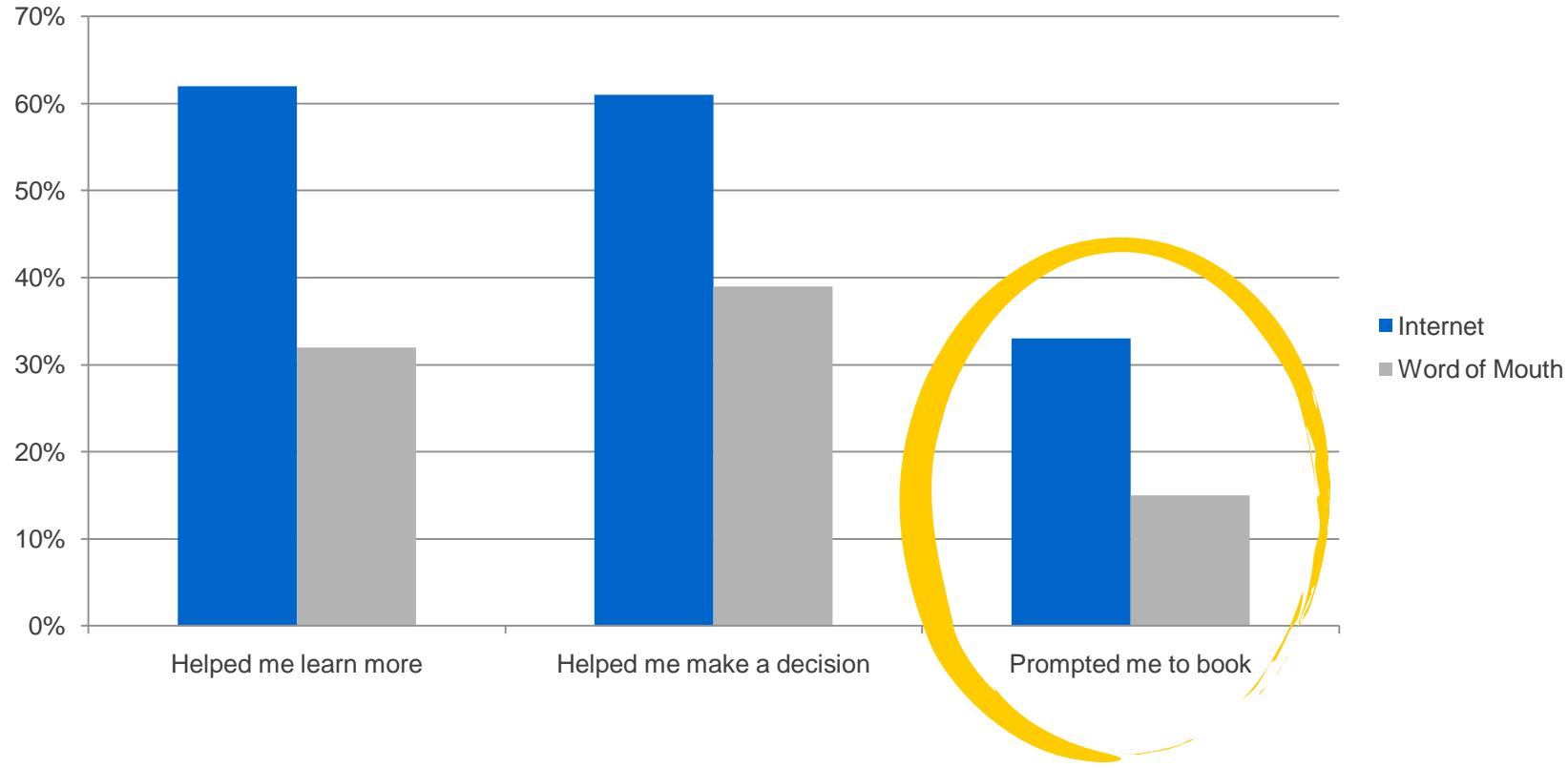
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(QR1/A1/H1/W1) Which of the following sources, if any, do you typically use to decide which company to rent a car from/airline/lodgings to use/cruise to book for personal/business trips? (n=2942)

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

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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

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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)

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

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



**52%**\*

vs.

**41%**  
**50%**

Personal  
Business

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



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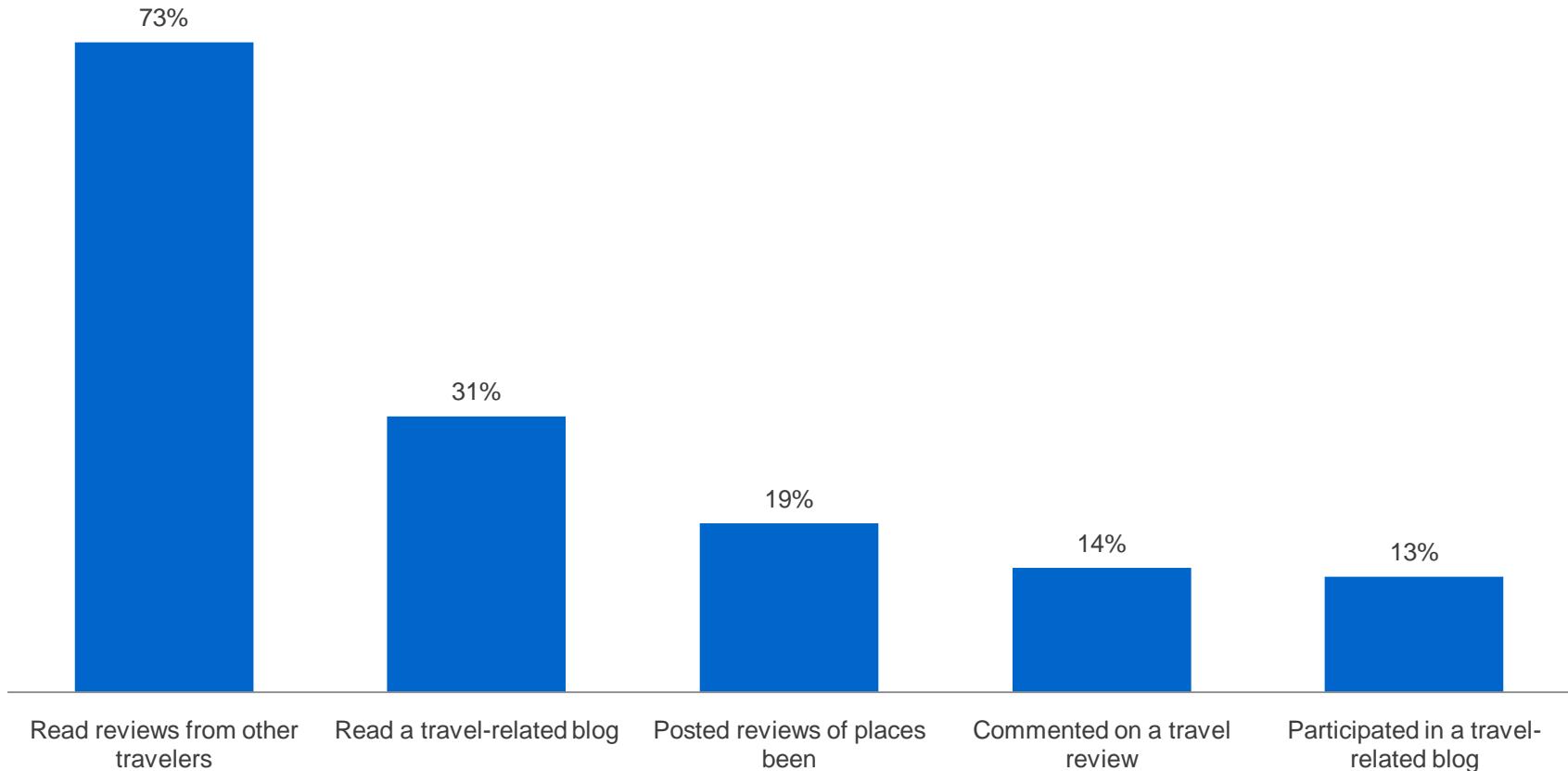
Source: Google & OTX, The Traveler's Road to Decision; June 2009

\*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



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

<b>I trust the content of....</b> (top 2 box summary)	<b>Affluents</b>
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



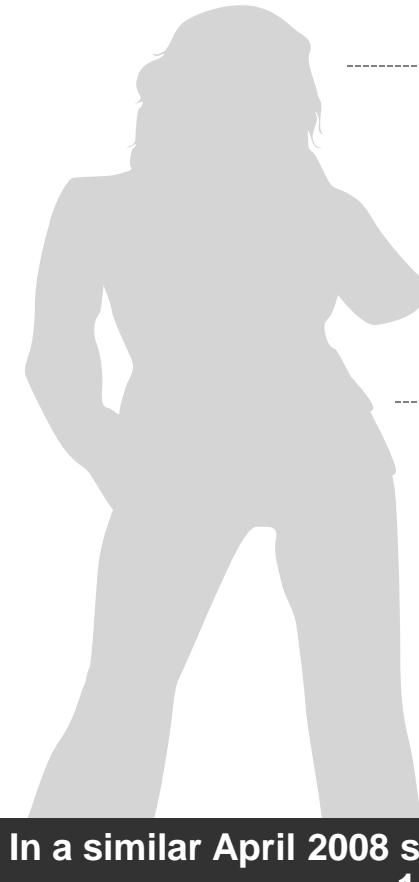
**73%.\***

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

# 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:

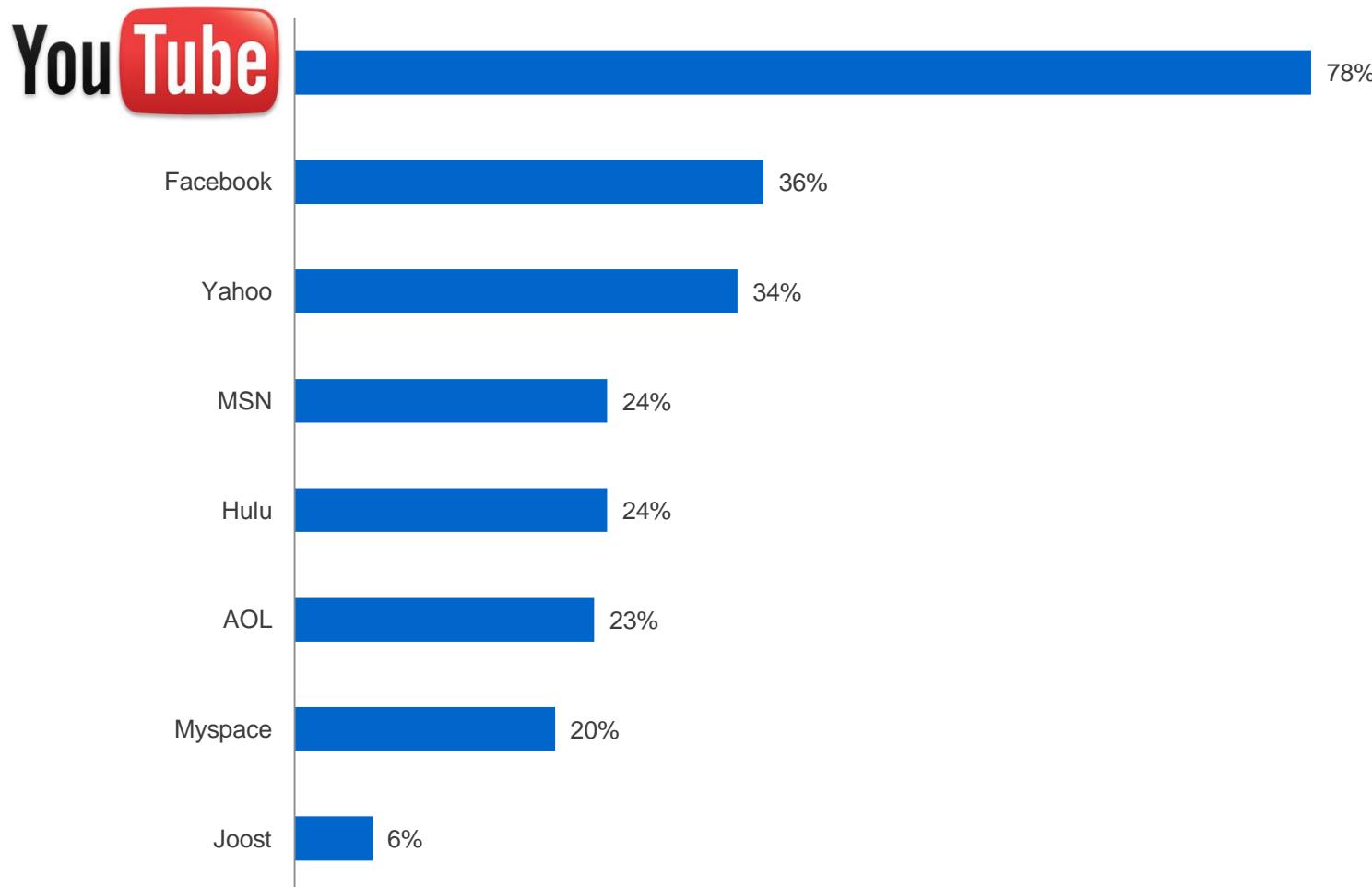
**53%**

Watch TRAVEL videos on the Internet:

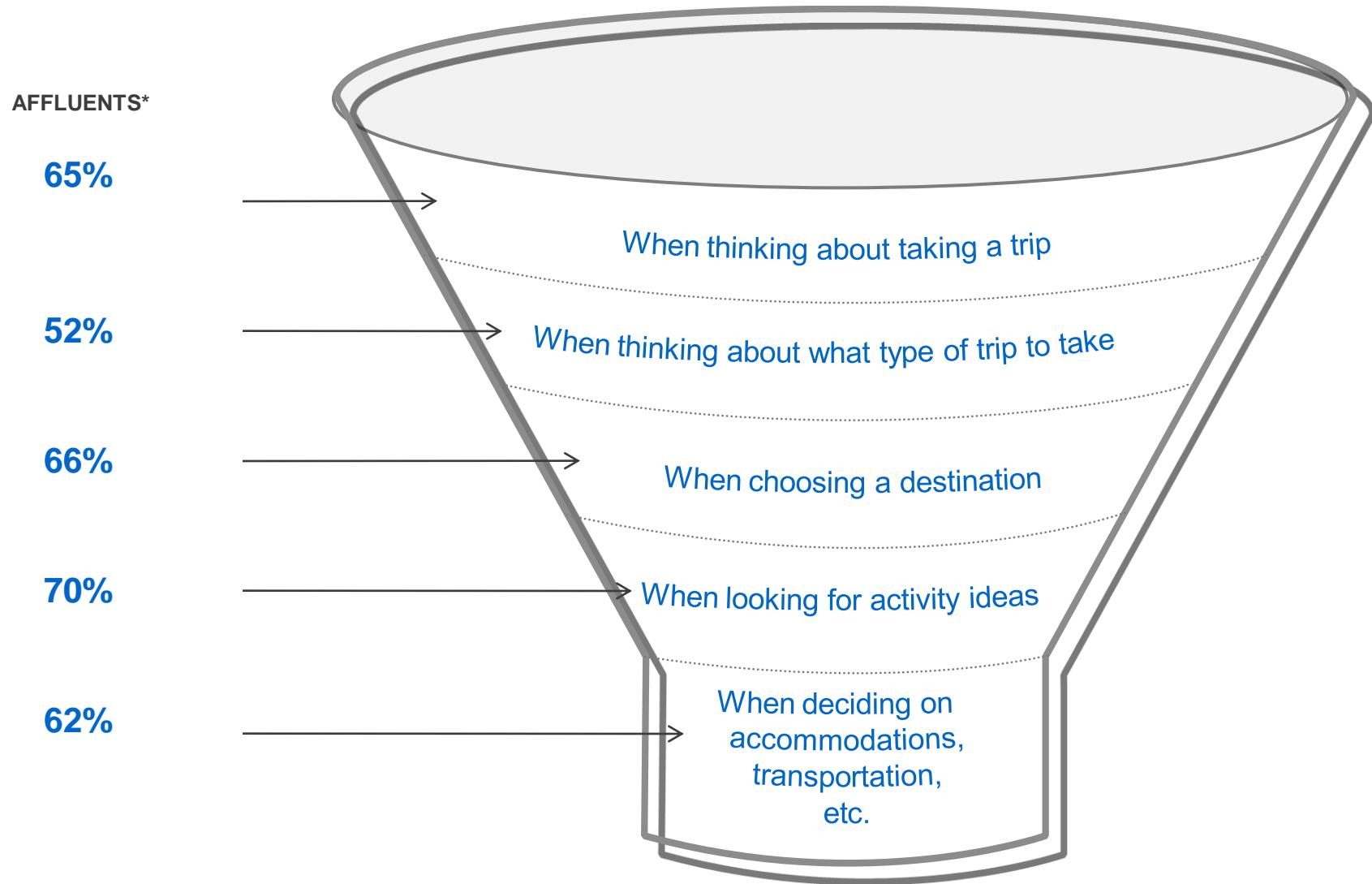
**49%**

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



\*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

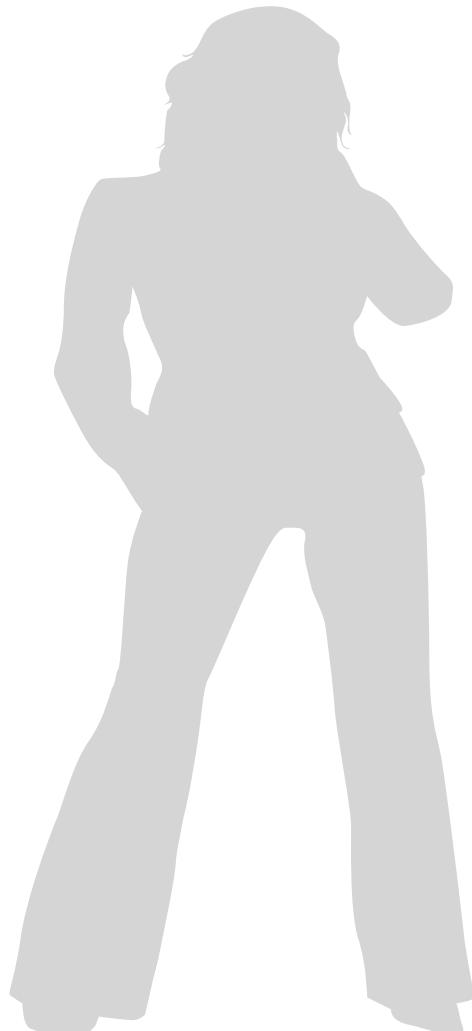
Marital Status: 84% Married/Living With Partner

Kids: 51% None; Mean: 1

Education: 73% College Grad+

Employment: 77% Employed

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

(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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