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The Inside Look at the Travel Boomer Buff

Google/Nielsen Online/Sterling
U.S., September 2010

Study Scope and Methodology

- **Survey Approach Developed by Nielsen and Google**
 - Google/Nielsen Boomers Survey fielded August 2010, N=3,878
- **Definitions**
 - Gen Y: 18-30
 - Gen X: 31-45
 - Boomers: 46-65
 - **Travel Boom Buffs = Baby boomer decision makers for personal travel**
 - G.I. Generation: 66-75
 - Silent/Lost Generation: 75+

Executive Summary

The travel industry has a significant share of the Boomer wallet.

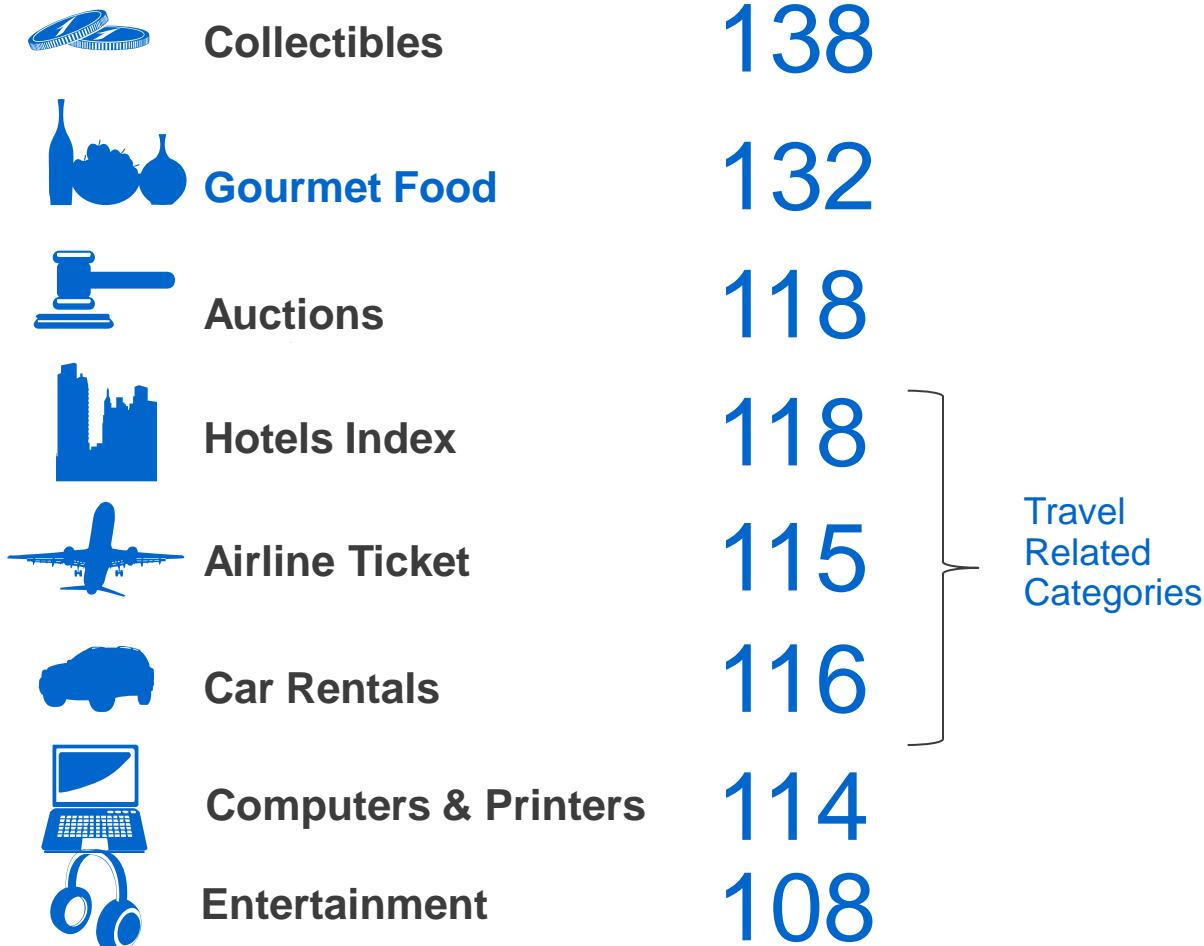
When it comes to gathering information, Boomers are just as search saavy as their younger counterparts. Boomer travel buffs are more likely to click on paid search links, find them relevant and useful than younger travelers.

Boomers also over-index with travel videos and are inclined to share travel-related videos.

Boomers look at travel as a way to connect and spending time with the family. They are more concerned about quality over price.

Travel One of the Categories that Boomers Spend on the Most

Categories where Boomers Spend Most



More Than Half of All Boomers Rely On Search Engines for Their Travel Needs

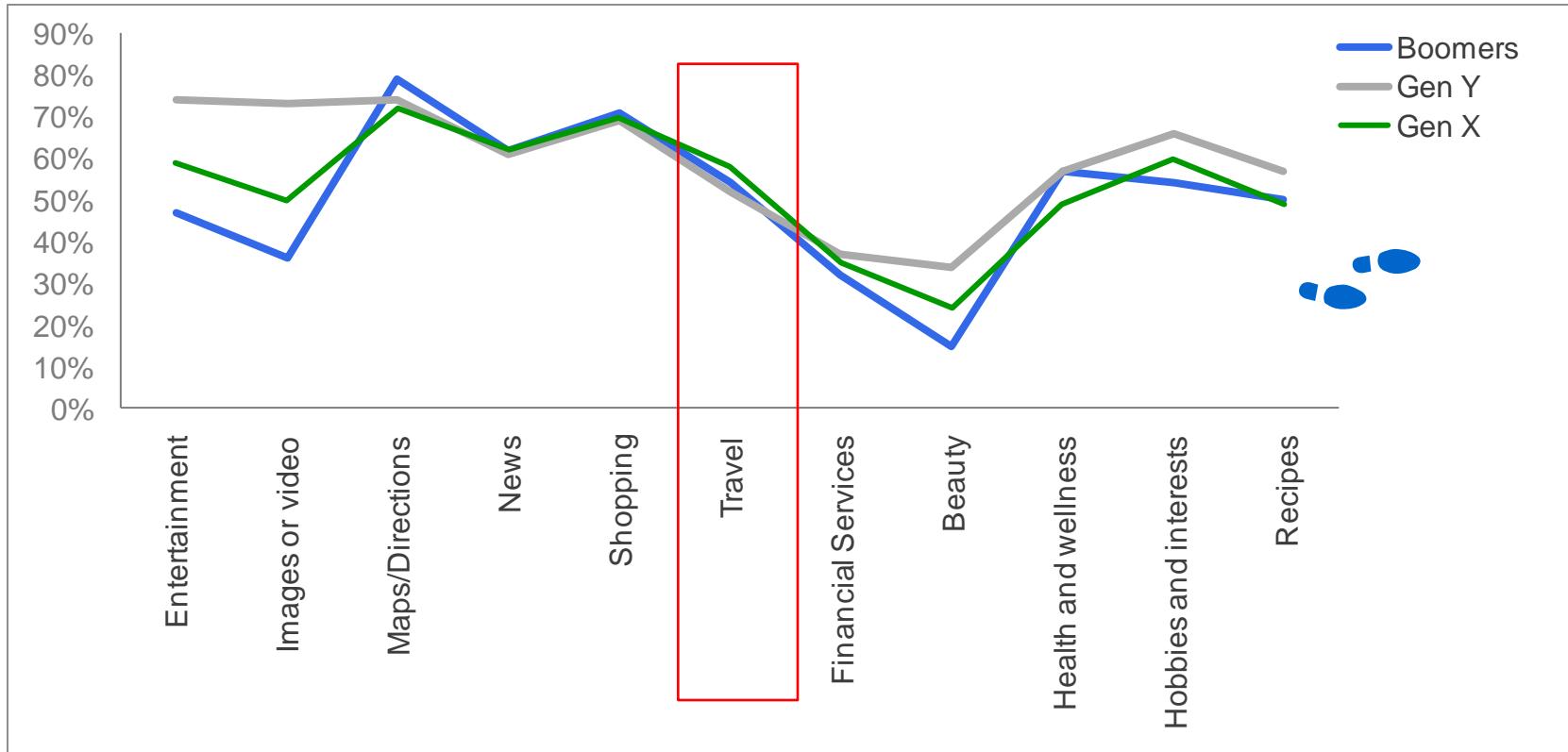
54%

use search to find travel related information such as destination information, vacation ideas, and booking

Source: Google/Nielsen Boomer Survey August 2010:
Q16: Which of the following types of information do you look for using search engines?
Boomers N= 2175.

Boomers Just As Search Saavy as Gen X and Y

Type of information searched for on search engine



Sponsored Links Speak to Boomer Travel Buffs

70%

**Boomer Travel
Buffs** click on
sponsored links

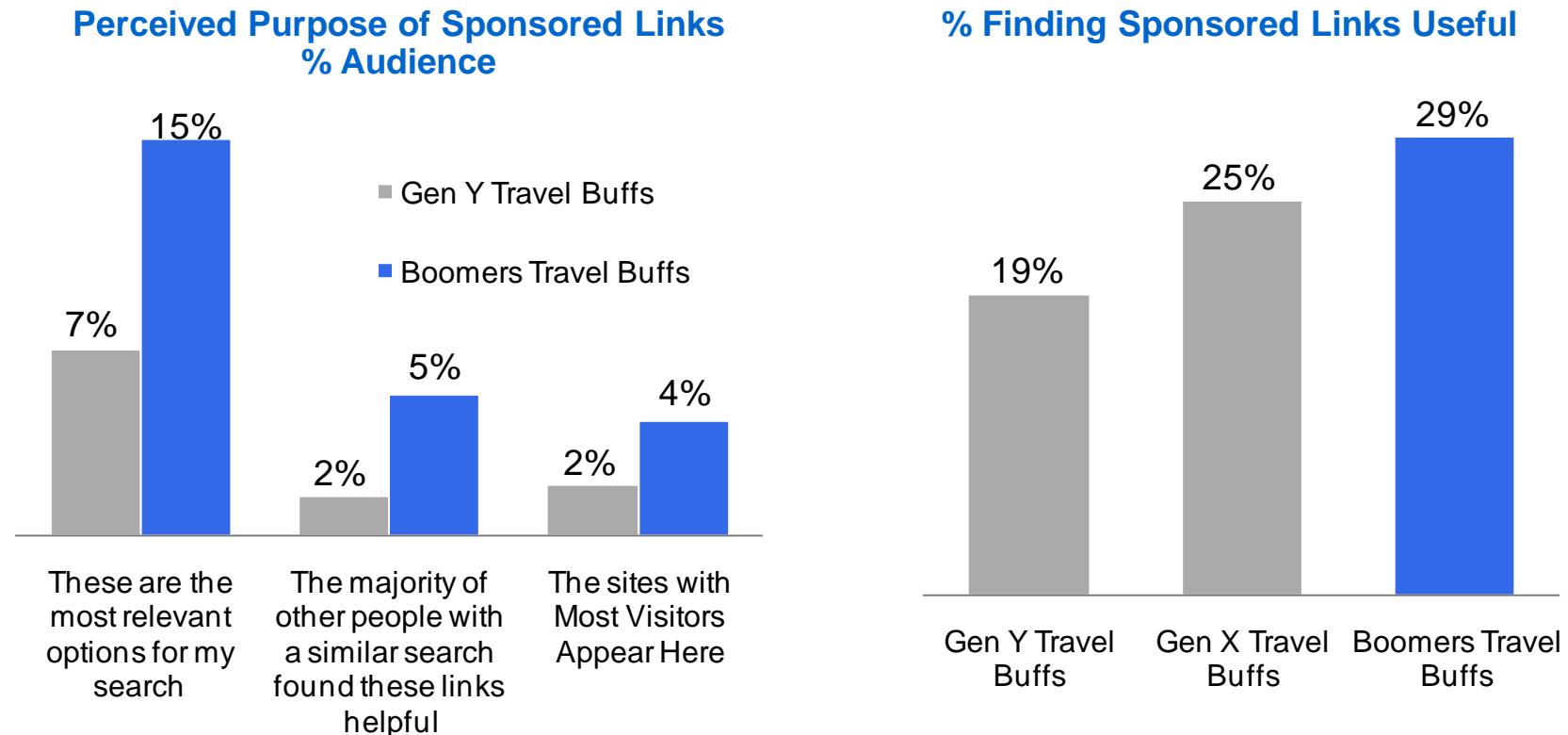
60%

Gen Y Travel Buffs
click on sponsored
links



Source: Google/Nielsen Boomer Survey August 2010:
Q21: "Have you ever clicked on links that typically appear in the sections highlighted in red?" Respondents who answered 'Yes'.
Gen Y N=265, Boomers N=2175

Boomer Travel Buffs Find Sponsored Links Relevant and Useful



Source: Google/Nielsen Boomer Survey August 2010:

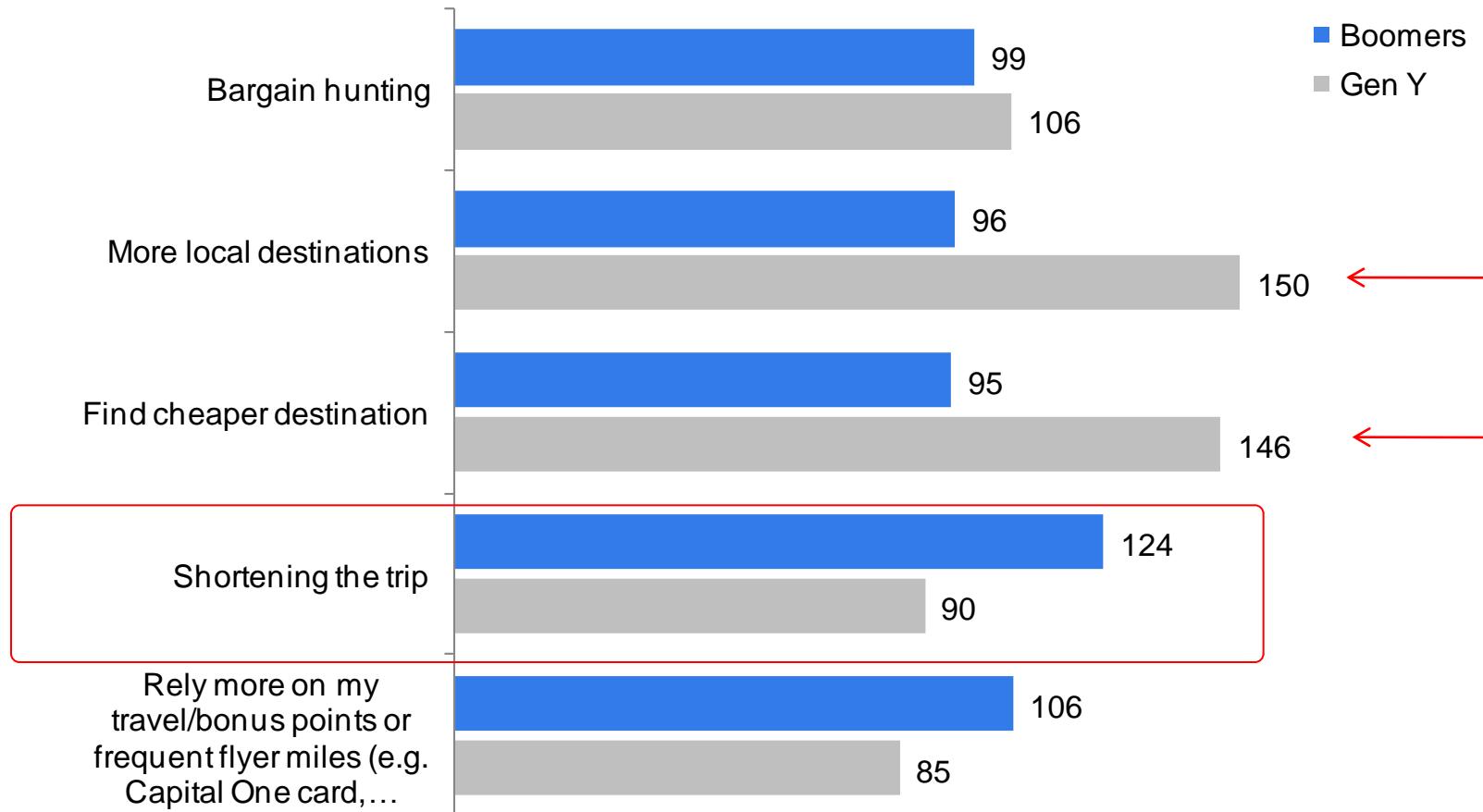
Q19: What one reason best explains why these listings appear prominently at the top of the page or to the right of the other listings?

Q20: Thinking about a typical internet search results page like this one, how useful do you typically find results in the highlighted section? Top 2 box (out of 5):

Gen Y Personal Travel decision makers N = 218; Gen X Personal Travel Decision Makers N = 564; Boomer Personal Travel Decision Makers N = 1941

Quality Beats Price For Boomers

Strategies Used to Spend Less Money on Travel in 2010



Source: Google/Nielsen Boomer Survey August 2010:

Q54C: You mentioned that you feel that you have less money to travel with in 2010. Based on this, which of the below strategies would you say that you are applying to address your situation, if any?
Gen Y N=28 , Boomers N =307

Family Time is High On The List With Boomers

55%

Of Boomers pay the **entire bill** for family vacations where they are traveling with the extended family

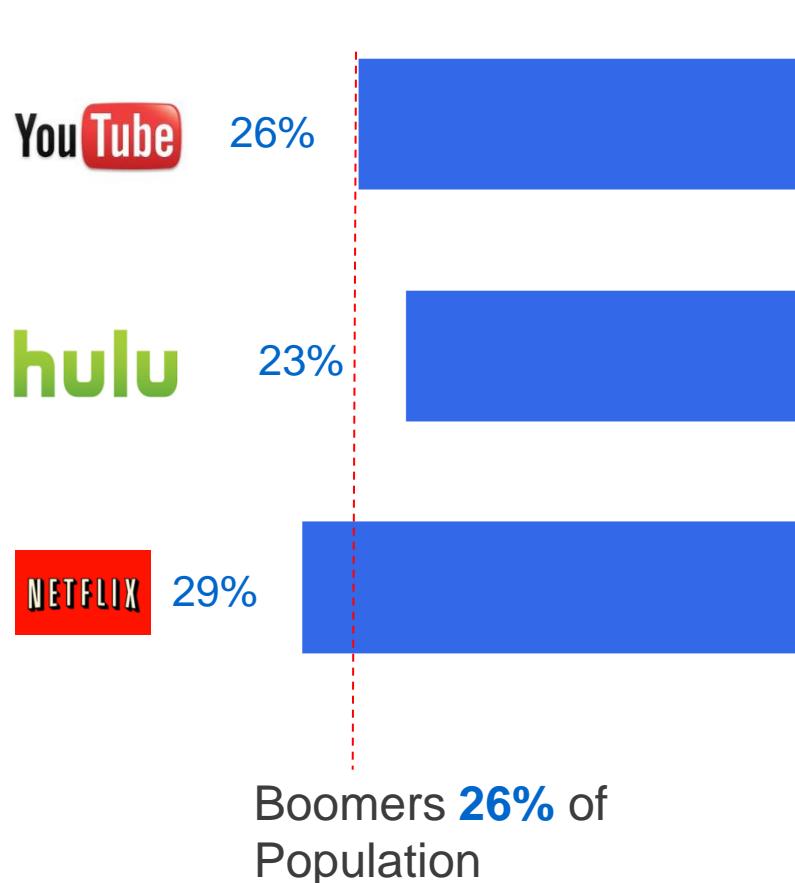


Source: Google/Nielsen Boomer Survey August 2010:

Q56: Thinking about the trips that you or you and your spouse will be taking with your extended family, who will be paying for these trips? Among respondents planning to travel with extended family.
N=486

Boomers Embrace Their Fair Share of Video

% Unique Audience Composition

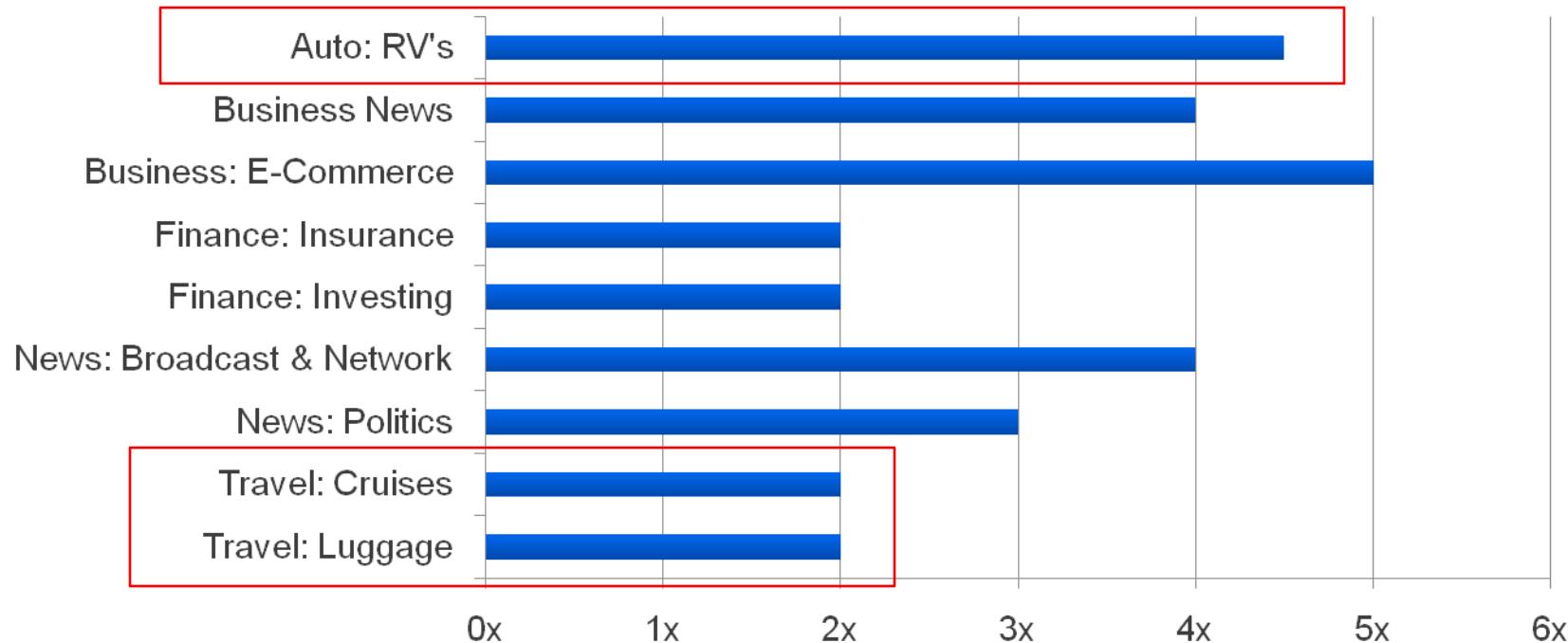


1 in 4

YouTube visitor is a Boomer

Boomers Have Interest in Watching Travel-Related Videos on YouTube

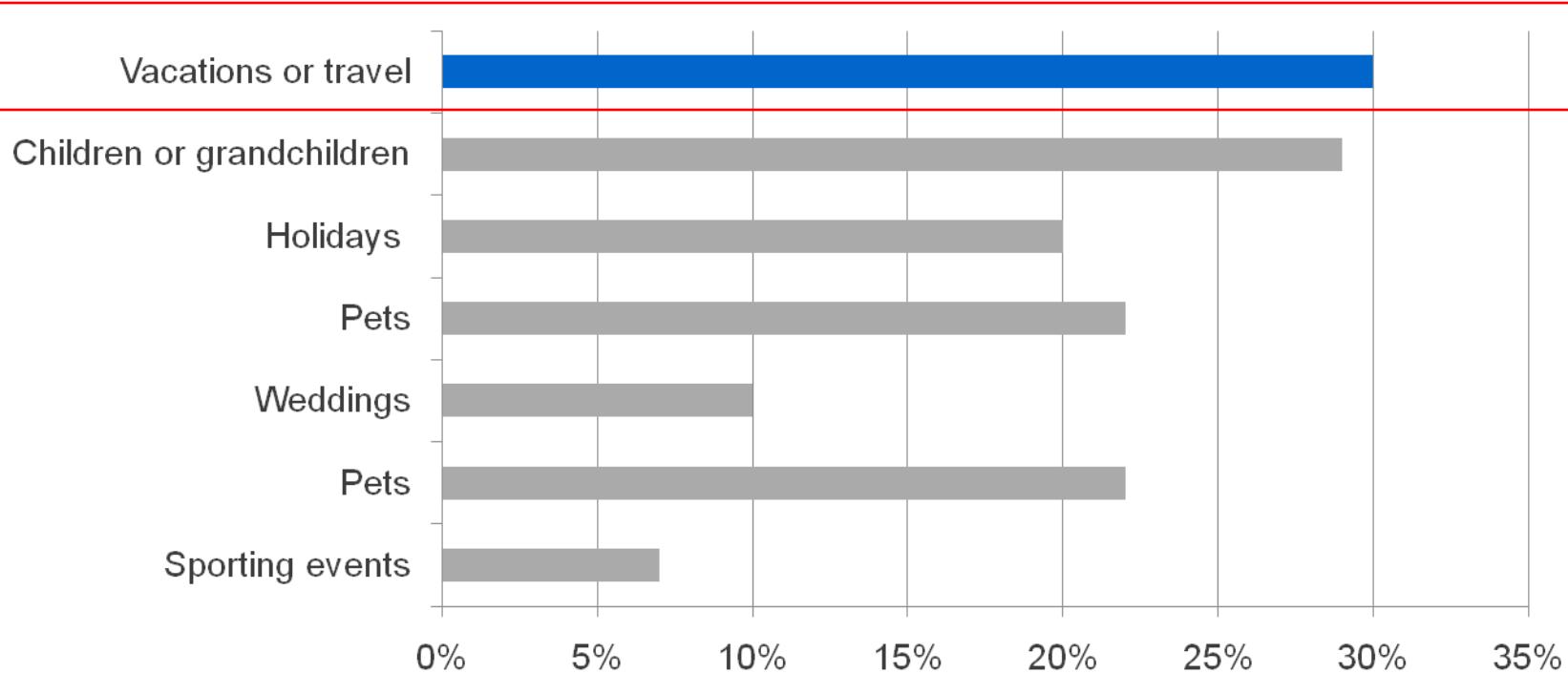
Males and Females ages 45-64 YouTube Viewing Index



Source: YouTube Video Targeting Tool Oct 2010

Boomers also Enjoy Sharing Travel-Related Videos with Others

Types of Video Content Shared by Boomers



Source: Google/Nielsen Boomer Survey August 2010:
Q29: What types of videos do you typically share with others, if any?
Boomers N=1452

Key Insights

Marketing Underpinnings

- 1 Boomer Travel Buffs are using search extensively for their travel needs. They find value sponsored links relevant and valuable
- 2 Boomers are comfortable with learning and sharing travel information in the form of video
- 3 Boomers are a curious and thoughtful demographic that value quality and family time.

Sponsored links are effective media vehicles to connect with the Boomer consumer.

Show, don't tell, in the form of videos to help Boomers visually research their travel destinations

Include creative messaging that emphasizes the experience of memorable family moments; it's not necessarily always about the deal and price.

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