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2010 Traveler's Road to Decision

The Role of Digital on Affluent Travelers
Google/OTX
U.S., September 2010

Research Methodology

- Google commissioned OTX, an independent marketing research company, to conduct a travel tracking study to better understand the role that travel plays in the lives of U.S. travelers.
- A base study of 5,000 personal and business travelers was conducted 4/10/10-4/27/10 and covered the categories of General Travel, Destinations, Hotel, Car, Air, and Cruise.
- An augment of 1,500 affluent personal travelers was included in the overall study and serves as the base for this specific set of data.
- Data concerning Affluent Travelers by sub-vertical (Car, Air, Hotel, Cruise) are contained within separate sub-vertical decks, available upon request.

Traveler Types Defined



Personal 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 \$200K+

Key Findings

1

Although the internet is used as the #1 planning resource for travelers both general and affluent, **online booking is more prevalent among affluent travelers.**

2

While Search is primarily used for information and research, it also prompts **1 out of 10 affluent travelers to book** – more so than general travelers.

3

Affluent travelers watch video **throughout the travel process**, watch video **more often than general travelers**, and **prefer expert videos** to user-generated content.

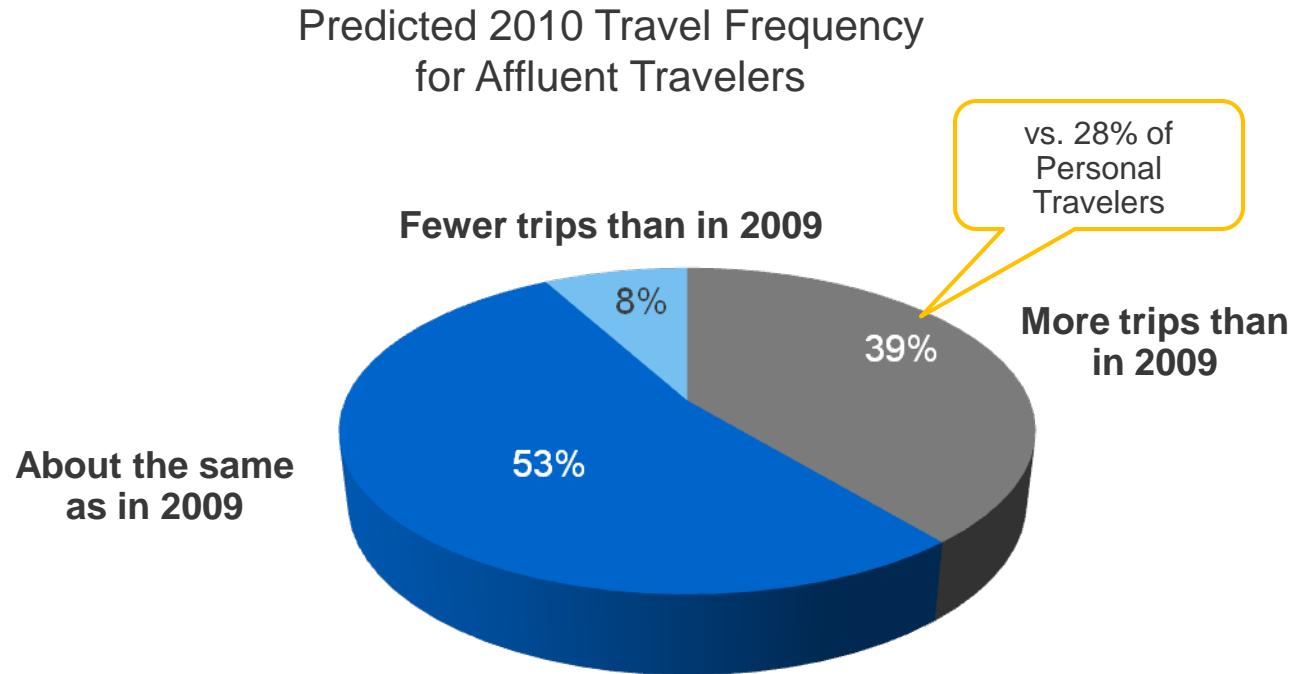
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Affluent travelers are **18% more likely** than general travelers to access the internet through Mobile phone.

5

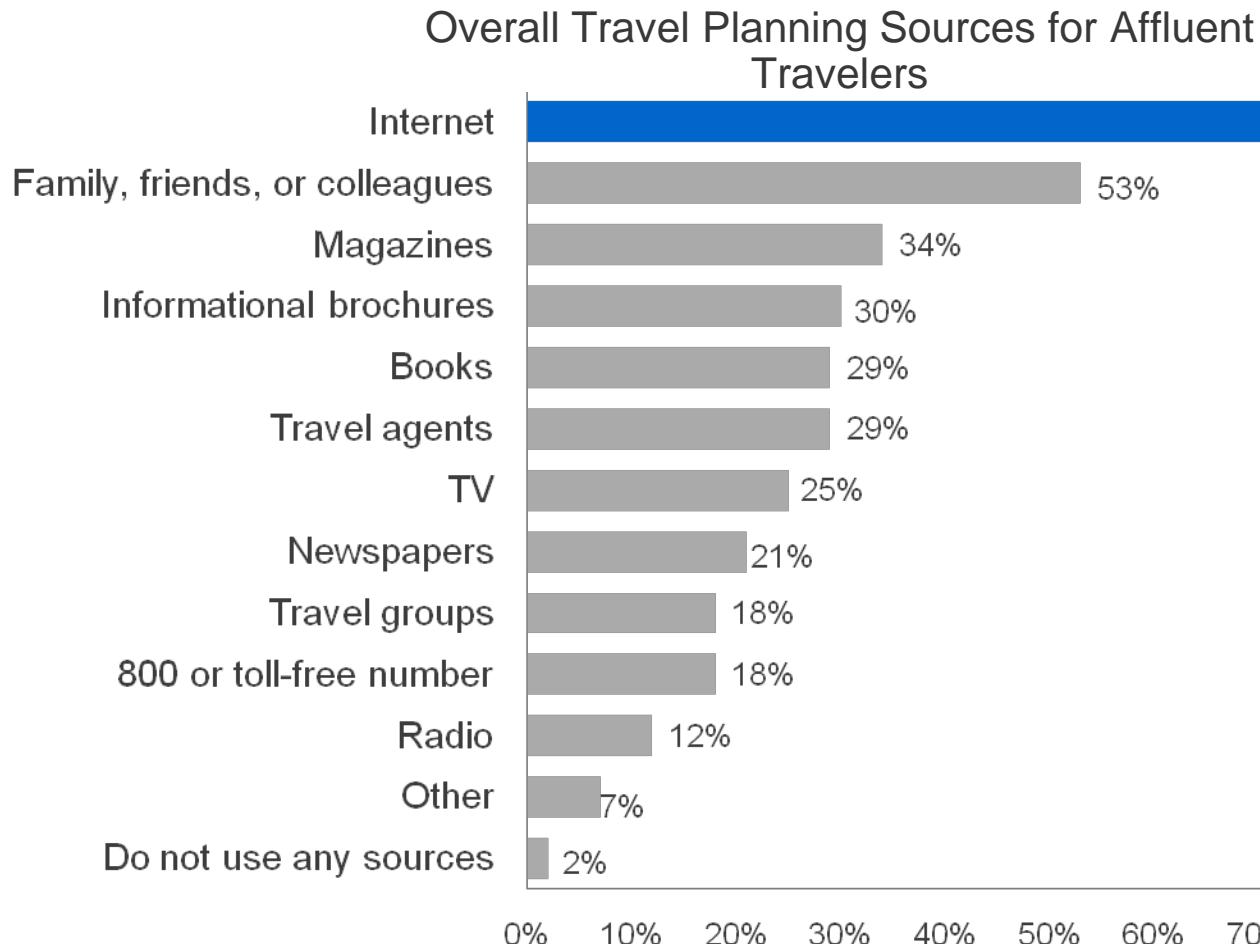
Not surprisingly, affluent travelers take **more international vacations** and **domestic vacations of greater distance** than the general population.

38% of Affluent Travelers Plan To Take More Trips In 2010 Than They Did In 2009



Market your brand's offerings that are relevant to the affluent traveler population – a group that is looking to travel.

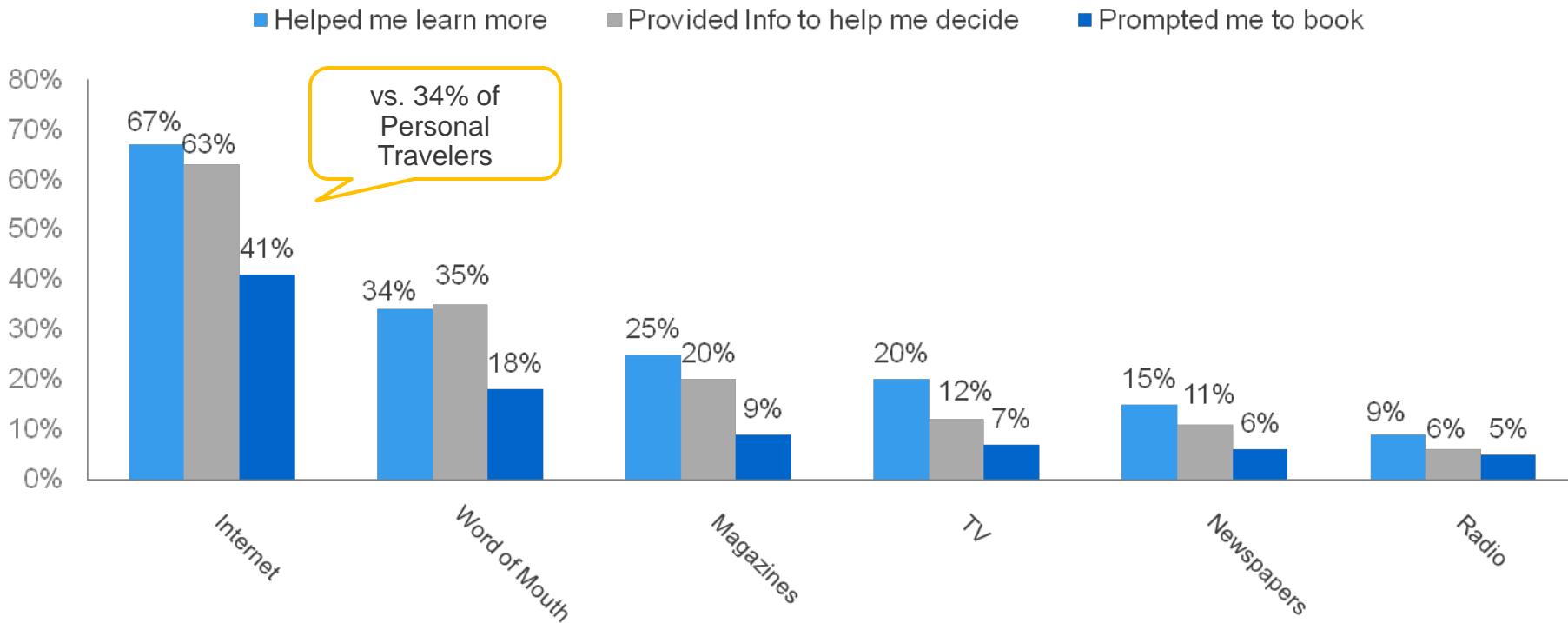
The Internet Is The #1 Travel Planning Tool for Affluent Travelers



In more detail: the Internet is the #1 planning resource among Affluent Travelers for planning Destinations (69%), Lodging (87%), Airlines (81%), Car Rental (72%), and Cruise (69%)

The Internet is the Most Influential Tool in Prompting Affluent Travelers to Book

Effect of Each Travel Source
Among Affluent Travelers



Online presence should be central to your strategy for capturing demand among affluent travelers.

Affluent Travelers are More Likely to Book as a Result of a Search Engine

Effect of Online Travel Sources Among Affluent Travelers

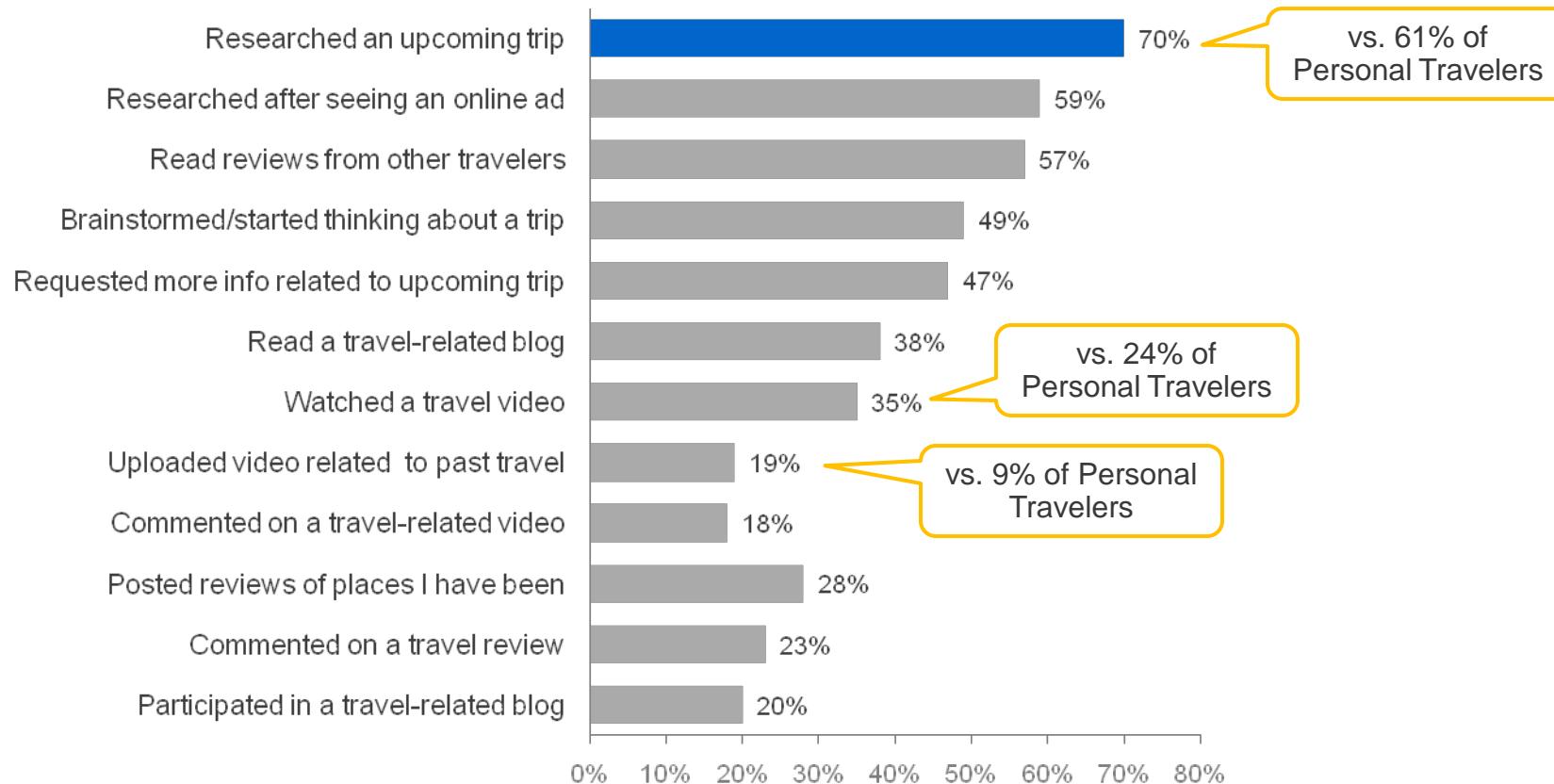
Effect of Online Travel Sources (Among Affluent)	Helped me learn more	Provided information to help me decide	Prompted me to book
Search engines	47%	41%	14%
Hotel websites	36%	44%	29%
Travel review sites	36%	31%	13%
Online travel agency	33%	39%	26%
Airline websites	32%	44%	33%
Destination-specific sites	31%	29%	12%
Online video sites	17%	13%	7%
Social networking sites	14%	11%	6%

vs. 9% of Personal Travelers

Providing relevant ads in Search results is a baseline, but messaging a call-to-action to affluent travelers ready to book is equally important.

Affluent Travelers Are Online Throughout the Entire Travel Process

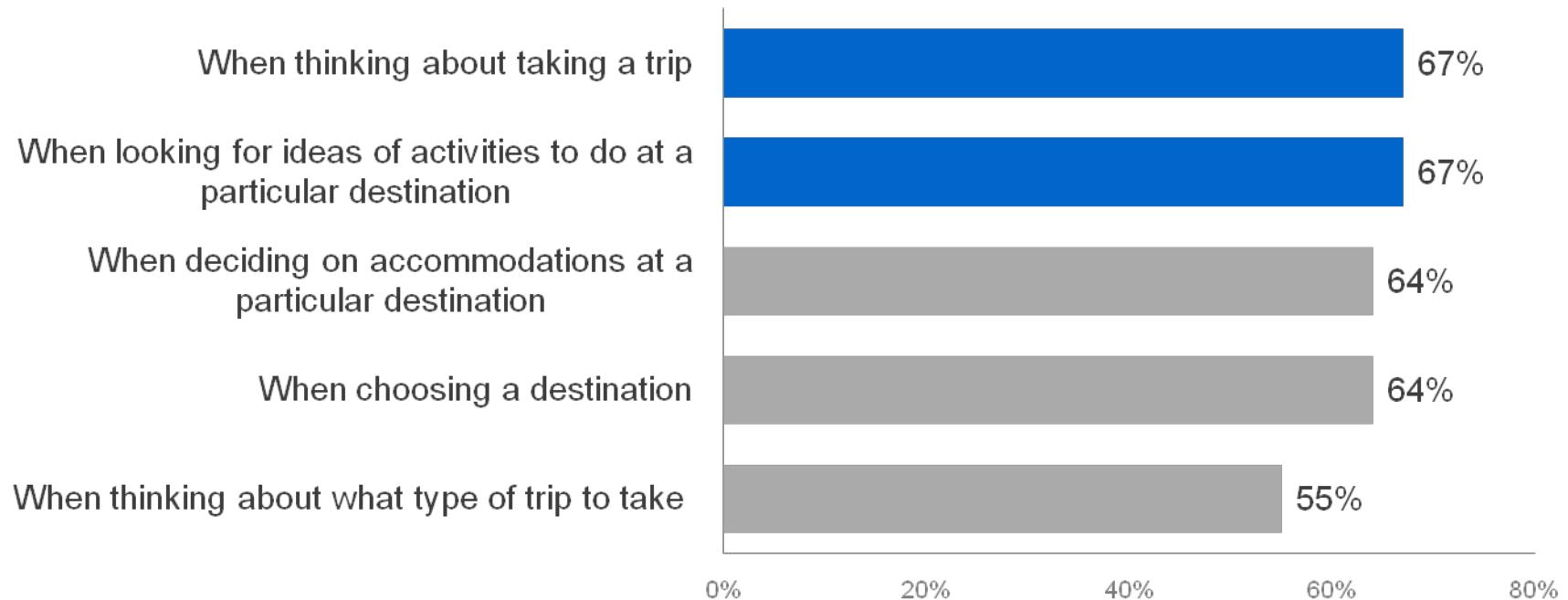
Online Travel Activity Among Affluent Travelers



Data and analytics provide actionable insights into your consumer, allowing for brand presence throughout the purchasing cycle.

Affluent Travelers Look at Video at All Stages of Planning

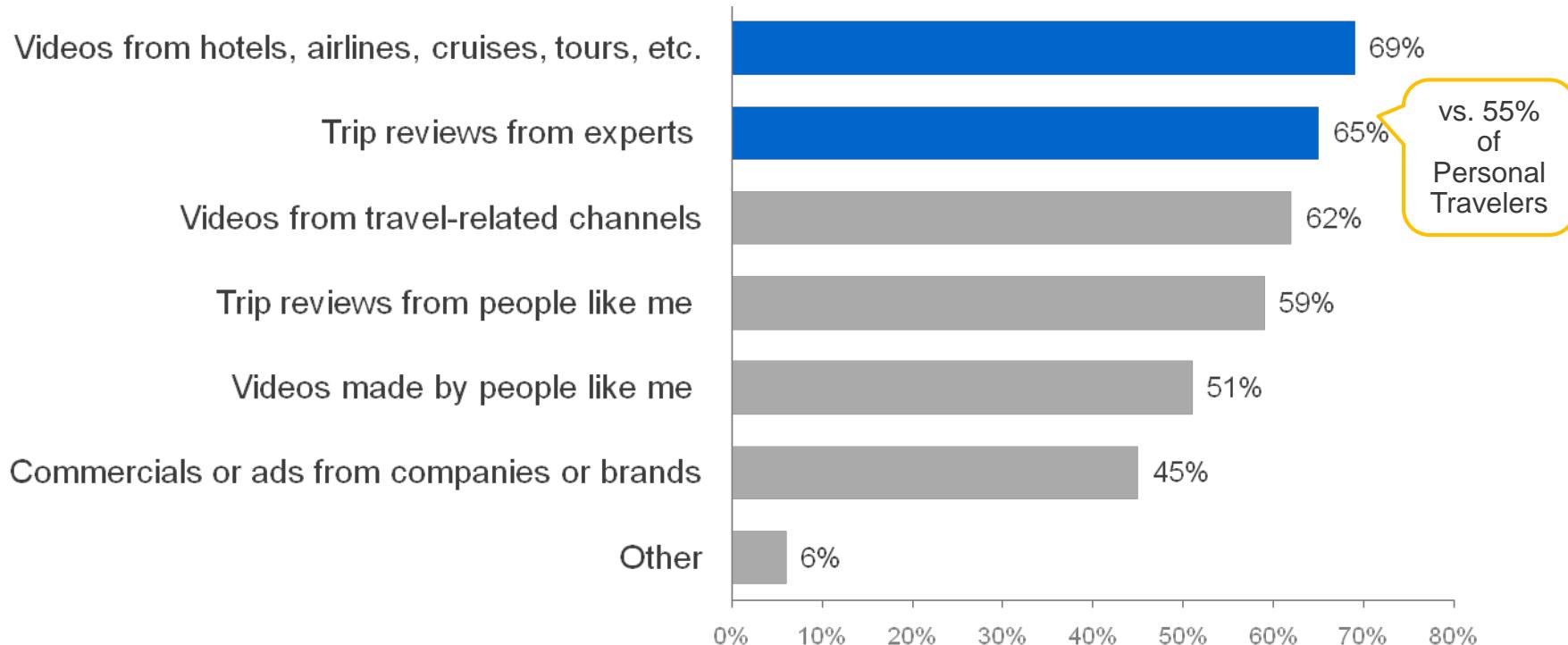
Stage of the Process When Affluent Travelers Watch Video



Considering that affluent travelers are watching video especially when they are looking for ideas and inspiration, consider advertising around video content of this nature.

Affluent Travelers Prefer Video by Experts and Brands

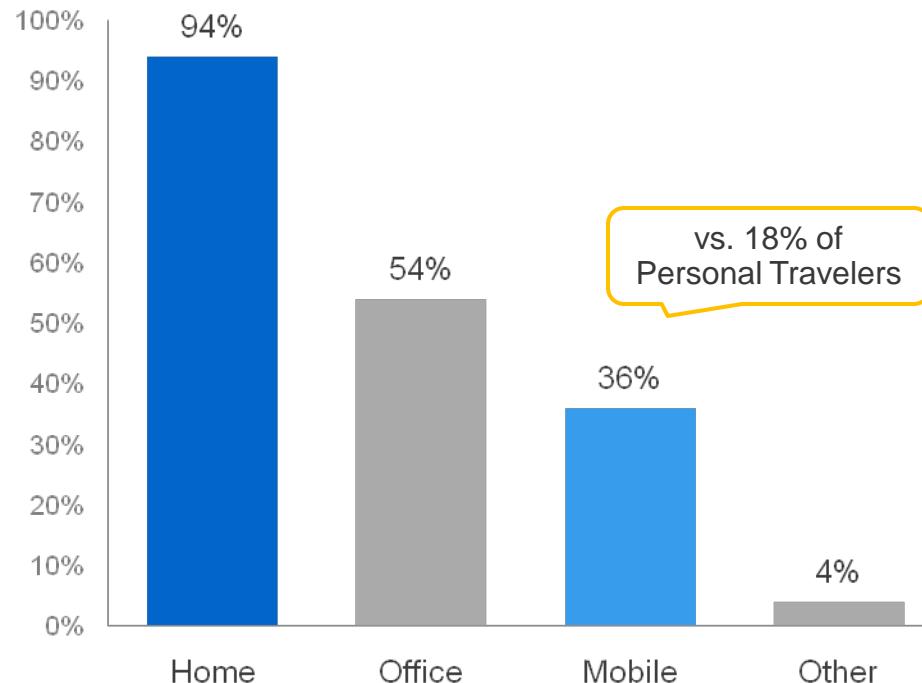
Types of Travel Video Watched by Affluent Travelers



If consumers are searching for or talking about your brand on video sites, you should provide content for them to find and consider.

Affluent Travelers are 18% More Likely to Access the Internet through a Mobile Phone

Where Affluent Travelers Access the Internet for Travel Info



A well-designed Mobile website and Mobile-specific Search campaigns should be a baseline, to reach affluent travelers – incremental demand on Mobile phones.

Affluent Travelers are More Likely to Use a Mobile Phone for Travel-Related Activity

Mobile Device Activity Among Affluent Travelers

Mobile Device Activities (Among Affluent)	Looked for information	Reserved or booked	Checked into
Vacation activities	60%	26%	26%
Air travel	58%	36%	38%
Overnight accommodations	57%	39%	29%
Car rental	52%	30%	28%
Travel packages	49%	27%	27%
Cruises	43%	24%	22%
Rail travel	35%	19%	23%

vs. 20% (each) of Personal Travelers

vs. 25% (air) and 18% (accomm.) of Personal Travelers

To capture incremental demand – among affluent travelers on mobile devices – implement Mobile Search and Click-to-Call functionality.

Source: 2010 Traveler's Road To Decision - Affluents, Google/OTX, September 2010

Base = Affluent & Use Mobile Phone for Travel Related Activities (n=496) (Q15c) Thinking about your personal/business travel, for which of the following, have you looked for information /booked /checked into via your mobile device in the past year?

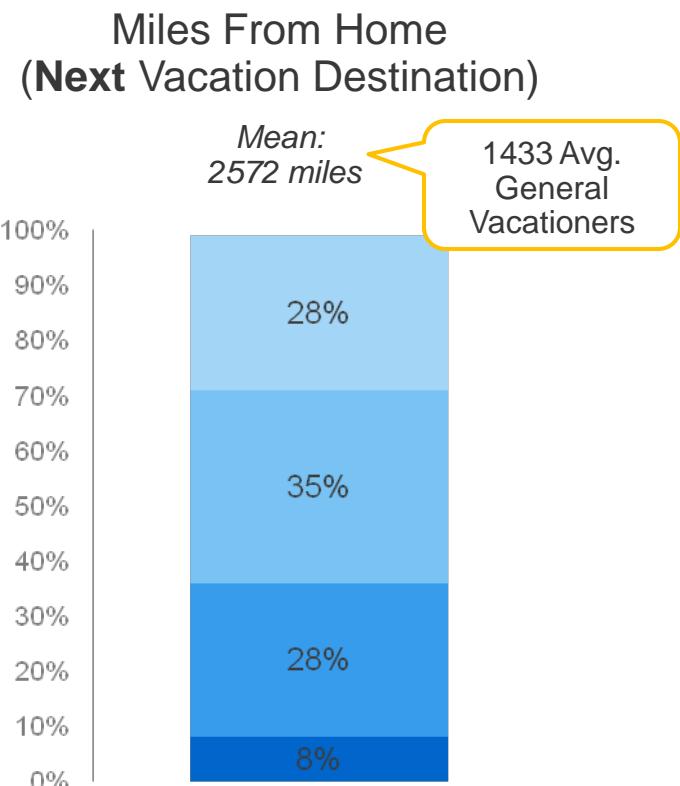
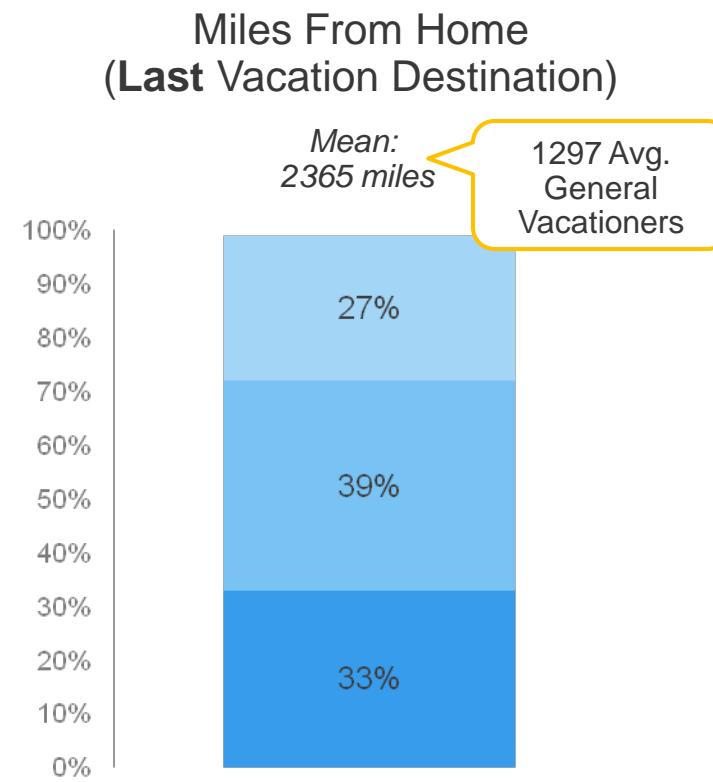
Affluent Travelers Engage with the Mobile Internet

Use of Mobile Device for Reservation/Booking Among Affluent Travelers

How Use Mobile Device To Reserve/Book (Among Affluent)	Using Mobile “Apps”	Via the Internet – Using the Browser
Air travel	28%	42%
Overnight accommodations	26%	47%
Car rental	23%	36%
Travel packages	20%	33%
Vacation activities	17%	34%
Cruises	17%	31%
Rail travel	12%	25%

Developing a consumer-friendly Mobile website, with appropriate landing pages and functionality, is key to generating conversions through Mobile devices.

Affluent Vacationers Travel Almost 2x Farther Than General Vacationers



When considering your target audience of affluent travelers, take the time to understand which major geographic areas are drivers.

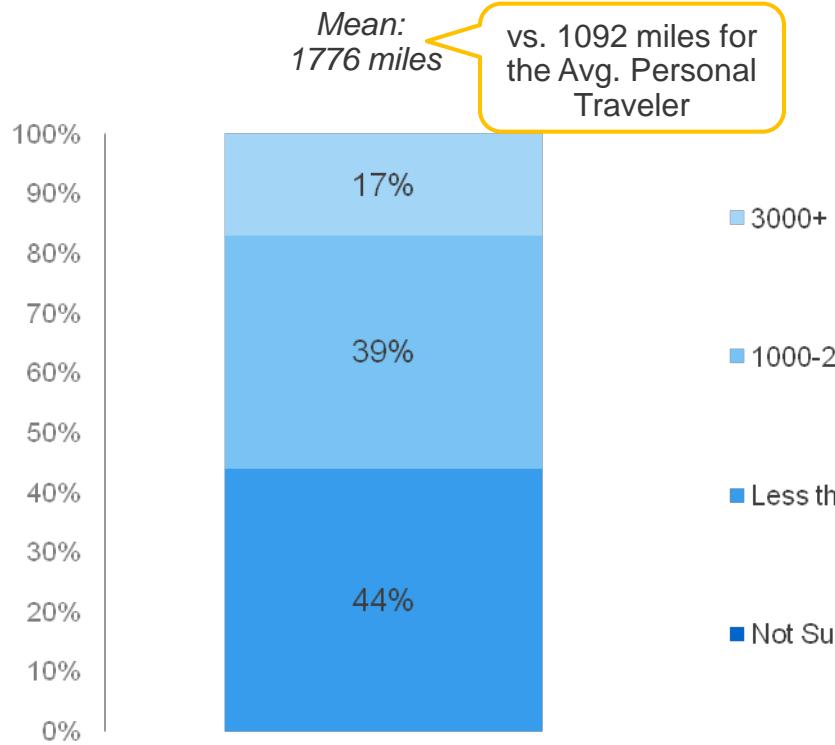
Source: 2010 Traveler's Road To Decision - Affluents, Google/OTX, September 2010

Base = Affluent Personal Travelers (n=1567) (QD2) Approximately how many miles from home was your last vacation destination?

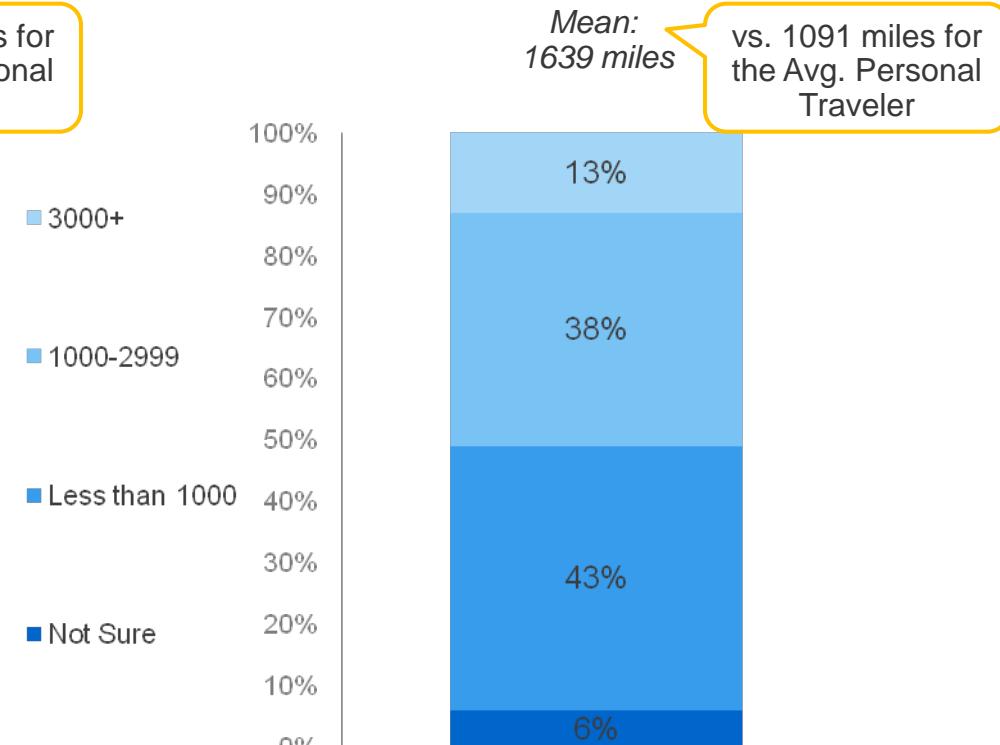
(QD3) Approximately how many miles from home do you think your next vacation destination will be?

Affluent Vacationers Take Longer Domestic Trips

Miles From Home
(Last Domestic Vacation Destination)

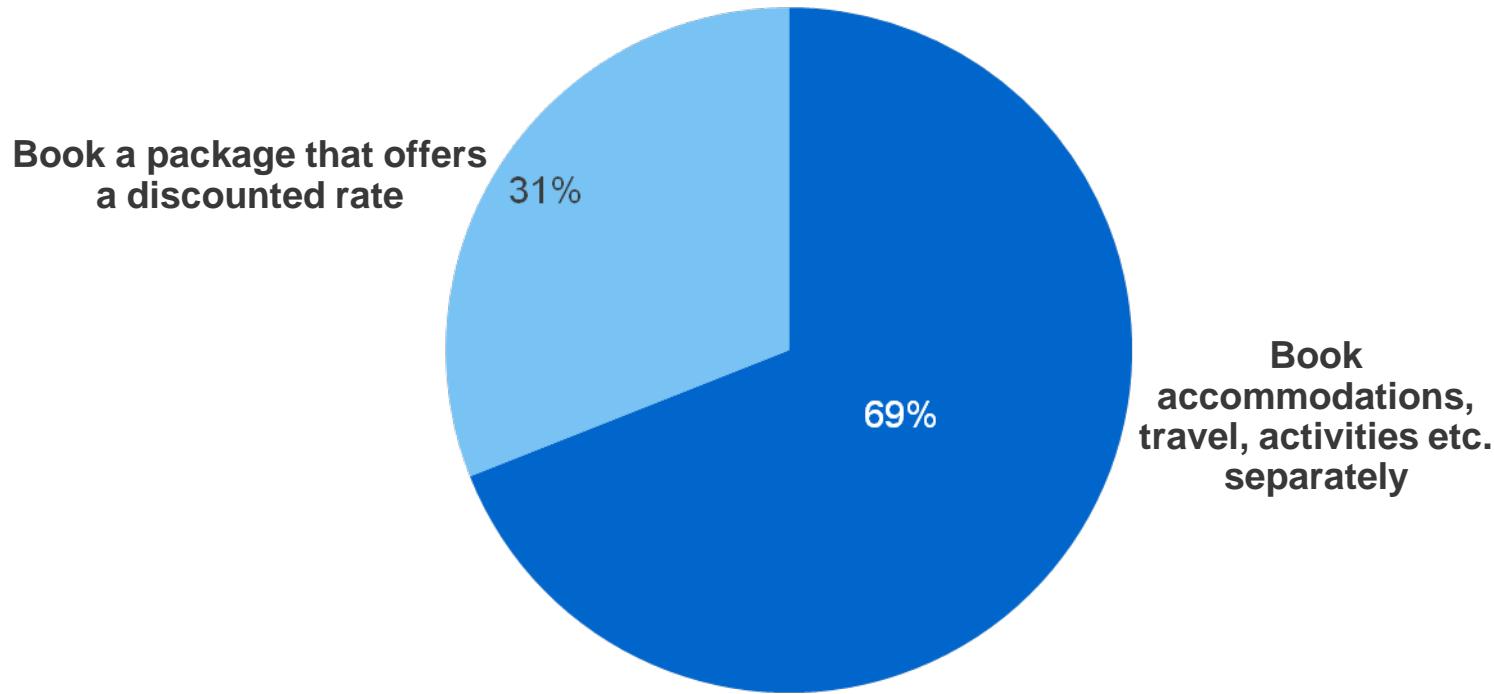


Miles From Home
(Next Domestic Vacation Destination)



Wealthy Travelers Tend To Book Travel Elements Separately Rather Than Booking A Package

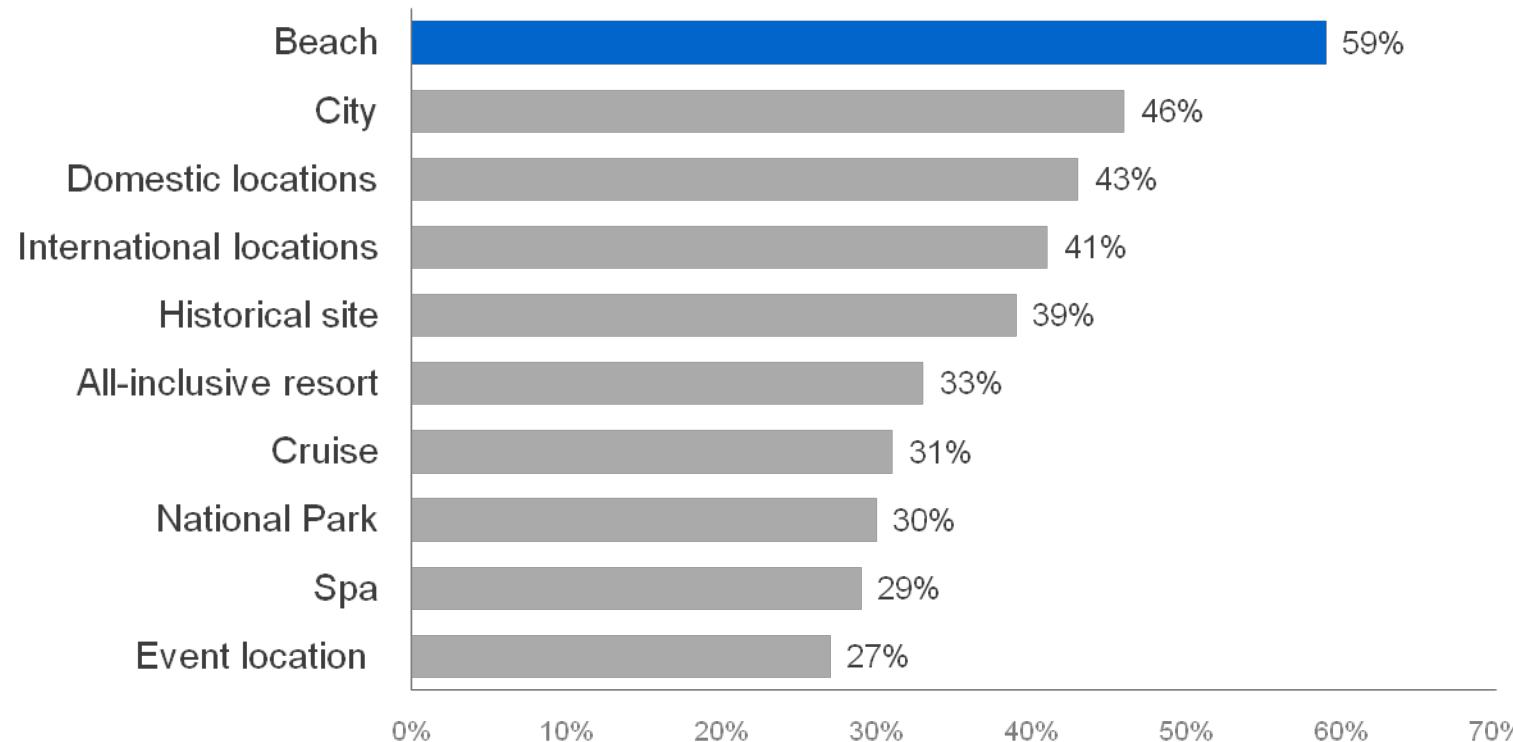
Vacation Booking Method Among Affluent Travelers



Providing relevant packaged and separate offerings – as relevant to your brand – are both important strategies.

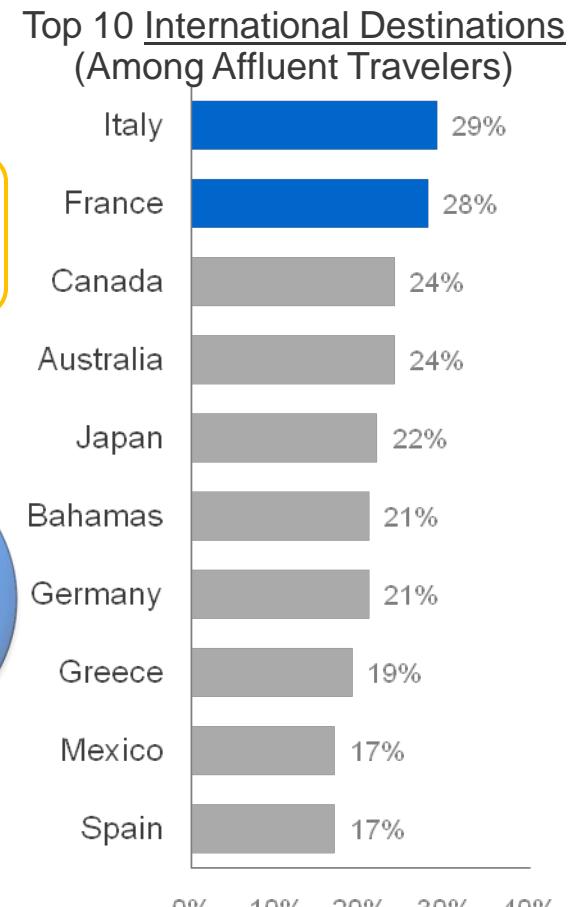
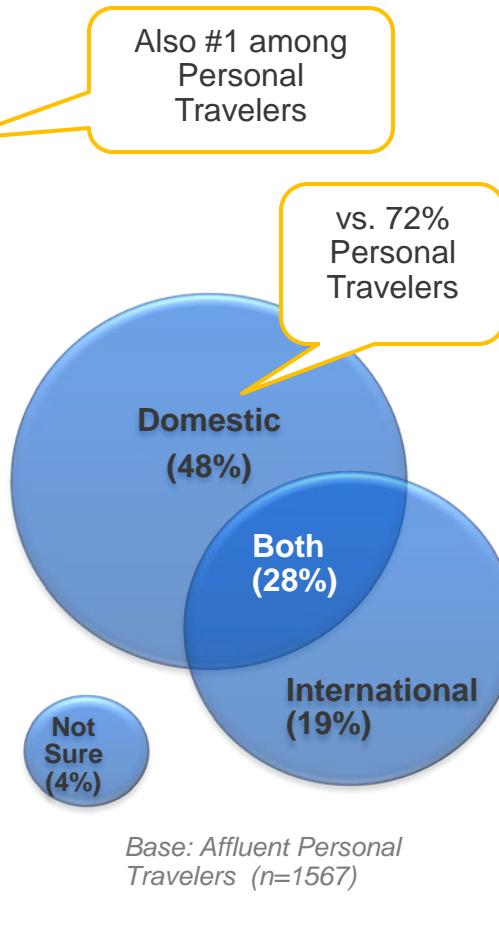
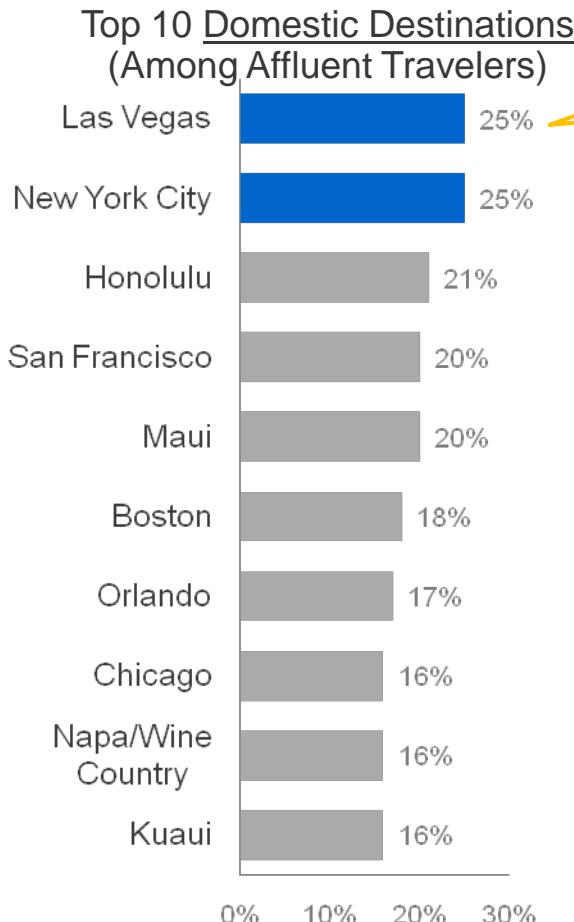
Nearly 3 out of 5 of Affluent Travelers List ‘Beach’ as a Top Destination

Top 10 Destination Types Considered By Affluent Travelers



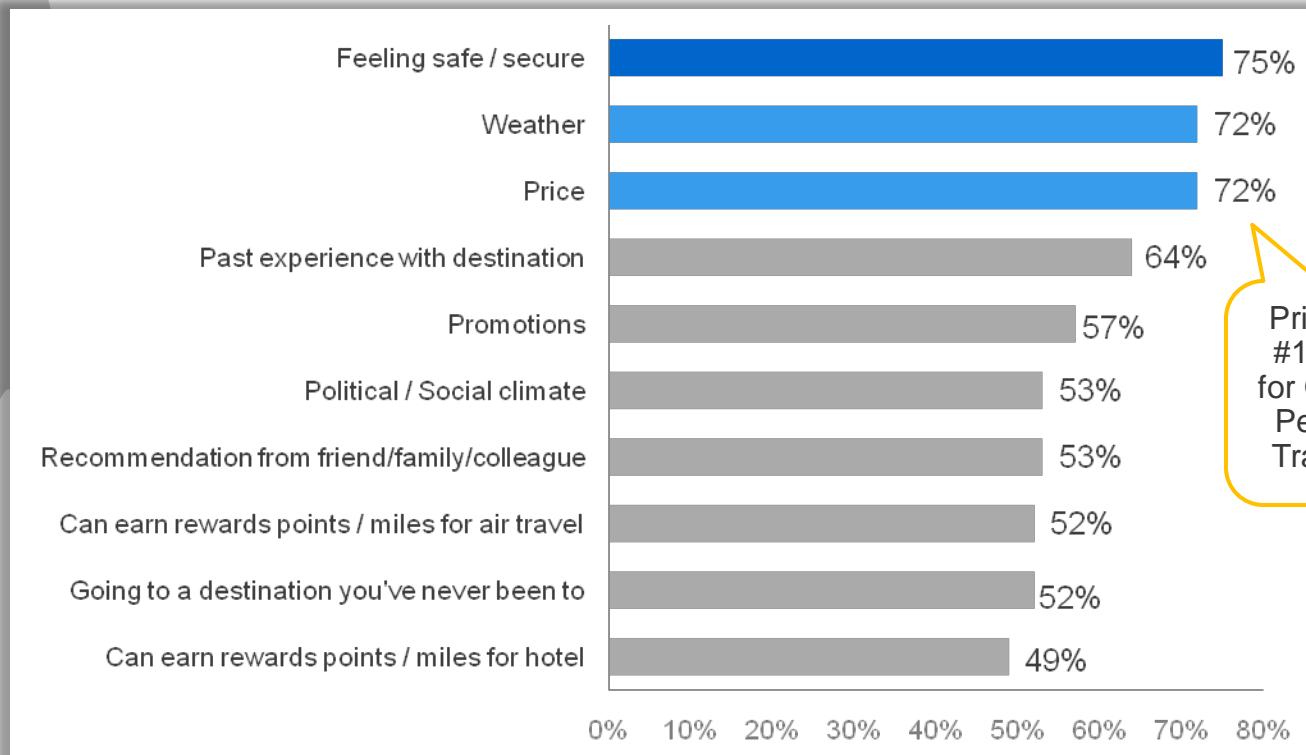
If you are targeting affluent travelers, there are clear destination types that should merit your focus.

Affluent Travelers Are More Likely To Travel Internationally Than General Travelers Are



Price is Secondary to Security Among Affluent Travelers

Features Most Important When Choosing Destination (Among Affluent - Top 2 Box)



Data into Action: Marketing Opportunities

- 1** Build an online presence to remain top-of-mind among affluent consumers actively and passively interacting with your brand.
- 2** Develop an extensive online booking engine that is easy to navigate and user-friendly to allow quick online bookings.
- 3** Build your presence through online video to match your brand – uploading professional assets where possible and driving relevant visits to promoted videos.
- 4** Make it easy for affluent travelers using their mobile phone to book with you – through improved internet or app functionality as well as a click-to-call option with all ad text.
- 5** Identify key destinations and vacation types that appeal to affluent travelers and match your offerings (ad copy, promotions, etc.) to consumer interest.

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