January 2014

The 2013 Traveler's Road to Decision: Affluent Insights
WHAT WE FOUND

- Affluent travelers rely on digital for travel inspiration as well as research and booking.
- Affluents comparison shop for travel, and half anticipate shopping around more in the next year.
- Affluent travelers move across devices for all types of travel activities, from research to booking and check-in.
- Online travel video usage is increasing among affluents.
- Affluents are increasing their enrollment in loyalty programs, which impacts their likelihood to book.
I generally begin **researching** online before I decide where or how I want to travel.

**Search engines** will be my go-to sources for travel ideas and information.

I plan to spend more time **shopping around/researching** before booking travel because finding value for my money is important to me.

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**ATTITUDES ABOUT VACATIONS IN THE NEXT YEAR**

70% 59% 52%

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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; 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. (Select ONE for each statement).
Affluents continue to **comparison shop** for all components of travel, especially for hotels.

**PERCENTAGE OF THOSE WHO ALWAYS/FREQUENTLY COMPARISON SHOP**

- **Airline:**
  - 2013 N=316; 2012 N=383; 2011 N=823
  - 68%

- **Hotel:**
  - 2013 N=310; 2012 N=379; 2011 N=804
  - 70%

- **Car Rental:**
  - 2013 N=322; 2012 N=390; 2011 N=852
  - 72%

Source: Ipsos MediaCT, Google Travel Study, May to June 2013.

(Q23/Q26) Using the scale below, please indicate how much you agree or disagree with each of the following statements about traveling for [personal/leisure/business] purposes in the next year. (Select ONE for each statement.)

Air quotas: 2013 N=316; 2012 N=383; 2011 N=823
Hotel quotas: 2013 N=310; 2012 N=379; 2011 N=804
Car quotas: 2013 N=322; 2012 N=390; 2011 N=852
Affluents are flying coach more often than in the past.

Source: Ipsos MediaCT, Google Travel Study (Waves 3, 4 and 5), April to May 2011, April to May 2012 and May to June 2013.
Base: Airline Quota
QA6: When flying for personal or leisure/business reasons, which type of seat do you typically purchase? (Select ONE).
Letter indicates a significant difference from comparable group at the 95% confidence level. Only significant differences from 2013 are noted.
While affluents continue to prioritize upscale hotels, boutique and vacation rental interest is growing.

**Source:** Ipsos MediaCT, Google Travel Study (Waves 3, 4 and 5), April to May 2011, April to May 2012 and May to June 2013.

**Base:** Lodging Quota; 2013 N=310, 2012 N=379, 2011 N=804

QH4: When traveling for personal/business reasons, in which of the following types of lodging establishments do you typically stay? (Select ONE.)
New trend: nearly **half of affluents** consider less traditional methods of lodging and transportation.

plan to research or use **peer-to-peer sharing alternatives**

*to traditional hotels or car rental services, such as Airbnb or Zipcar, when traveling for business in the next year.*

Source: Ipsos MediaCT, Google Travel Study, May to June 2013.

Base: Business Quota

Q26: Using the scale below, please indicate how much you agree or disagree with each of the following statements about traveling for **business purposes** in the next year. (Select ONE for each statement.)
For affluents, **price is more important** in domestic than international car rental selections.

<table>
<thead>
<tr>
<th>MOST IMPORTANT FEATURES WHEN CHOOSING RENTAL CARS</th>
<th>Domestic (n=320)</th>
<th>International (n=153)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price</td>
<td>83%</td>
<td>58%</td>
</tr>
<tr>
<td>Past experience with car rental agency</td>
<td>46%</td>
<td>37%</td>
</tr>
<tr>
<td>Can earn reward/Travel points</td>
<td>33%</td>
<td>27%</td>
</tr>
<tr>
<td>Promotions (free upgrades, etc.)</td>
<td>28%</td>
<td>18%</td>
</tr>
<tr>
<td>Recommendation from company or company policy</td>
<td>22%</td>
<td>14%</td>
</tr>
<tr>
<td>Specific vehicle makes and models available</td>
<td>21%</td>
<td>18%</td>
</tr>
<tr>
<td>Cancellation policy/Ability to change booking</td>
<td>19%</td>
<td>20%</td>
</tr>
<tr>
<td>Car company website (accessed via computer)</td>
<td>14%</td>
<td>8%</td>
</tr>
<tr>
<td>GPS navigation-equipped vehicles</td>
<td>7%</td>
<td>11%</td>
</tr>
</tbody>
</table>

For affluents, **price is more important** in domestic than international car rental selections.

Source: Ipsos MediaCT, Google Travel Study, May to June 2013.
Base: Car rental quota and rented car domestically or internationally (floating); *Business Quota only; Domestic N=320; International N=153
R9: What are the most important factors to you when deciding on a vehicle to rent when travelling on each type of personal or leisure/business trip? (Select up to three for each type of trip.)
Online ads, including search engine results, are most likely to influence affluent cruise bookings.

68% of affluents are influenced to book by some type of ad.

Source: Ipsos MediaCT, Google Travel Study, May to June 2013.
Base: Cruise Quota (N=311)
QW14: When thinking about the last cruise you booked, which advertisement(s), if any, influenced you to book? (Select ALL that apply.)

ADVERTISEMENTS THAT INFLUENCED BOOKING
- Search engine result: 24%
- Online advertisement/Banner: 24%
- Email promotion: 24%
- Television commercial: 22%
- Direct mail: 18%
- Social media advertisement: 16%
- Print advertisement: 15%
- Billboard: 13%
- Radio advertisement: 12%
- Other: 6%
The **internet** is as essential for inspiring new travel as it is for planning travel.
Affluents equally value the internet and word of mouth as sources of inspiration.

Magazines, traditionally viewed as a leading source for inspiration, are not viewed as important compared to other sources.

Source: Ipsos MediaCT, Google Travel Study, May to June 2013.
Base: Personal Quota and use specific sources for inspiration (N=53–982)
Q6E: How important do you consider each source for inspiring ideas for your personal or leisure trips?
Affluent travelers are **relying less on offline sources** for planning every year.

![Travel Planning Sources Used by Affluent Travelers](chart.png)

**Source:** Ipsos MediaCT, Google Travel Study (Waves 3, 4 and 5), April to May 2011, April to May 2012 and May to June 2013.

**Total Respondents:** 2013 N=1563; 2012 N=1637; 2011 N=1655

Q7: Which of the following sources do you typically use to **plan personal or leisure/business trips**? (Select ALL that apply).

*Magazines/Newspapers combined in 2012; 2011 excluded from report.*
Affluents engage in **travel activities** across the web.

One in three affluent travelers **watch** travel videos (consistent with 2012).

<table>
<thead>
<tr>
<th>Online Travel Activity</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Researched an upcoming trip</td>
<td>80%</td>
</tr>
<tr>
<td>Read reviews from other travelers</td>
<td>67%</td>
</tr>
<tr>
<td>Researched a destination, flight, hotel or vacation as a result of seeing an online ad</td>
<td>56%</td>
</tr>
<tr>
<td>Brainstormed or started thinking about a trip</td>
<td>55%</td>
</tr>
<tr>
<td>Requested more information related to an upcoming trip</td>
<td>41%</td>
</tr>
<tr>
<td>Read a travel-related blog</td>
<td>35%</td>
</tr>
<tr>
<td>Looked at travel content or reviews shared/posted by my friends or family</td>
<td>33%</td>
</tr>
<tr>
<td>Watched a travel video</td>
<td>30%</td>
</tr>
<tr>
<td>Posted reviews of places I have been</td>
<td>27%</td>
</tr>
<tr>
<td>Commented on a travel review</td>
<td>14%</td>
</tr>
</tbody>
</table>

Source: Ipsos MediaCT, Google Travel Study, May to June 2013.
Base: Total Respondents, Affluent 2013 N=1563
Q4: Which of the following have you done online in the past 6 months? (Select ALL that apply.)
Letter indicates a significant difference from comparable group at the 95% confidence level. Only significant differences from 2013 are noted.
Affluents rely on **brand.com**, search and OTAs the most for planning, consistent with last year.

## TOP ONLINE SOURCES USED BY AFFLUENTS

<table>
<thead>
<tr>
<th>Source</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airline sites</td>
<td>78%</td>
</tr>
<tr>
<td>Hotel sites</td>
<td>77%</td>
</tr>
<tr>
<td>Search engines</td>
<td>66%</td>
</tr>
<tr>
<td>Travel review sites</td>
<td>61%</td>
</tr>
<tr>
<td>Online travel agency</td>
<td>52%</td>
</tr>
<tr>
<td>Car rental sites</td>
<td>51%</td>
</tr>
<tr>
<td>Map sites</td>
<td>46%</td>
</tr>
<tr>
<td>Travel search sites</td>
<td>46%</td>
</tr>
<tr>
<td>Destination-specific sites</td>
<td>38%</td>
</tr>
<tr>
<td>Daily deal sites</td>
<td>19%</td>
</tr>
</tbody>
</table>

Source: Ipsos MediaCT, Google Travel Study (Waves 3, 4 and 5), April to May 2011, April to May 2012 and May to June 2013.
Base: Affluent 2013 N=1357

Q10 Base: Use Internet to plan trips
Q10: Which of the following **online sources** do you typically use to **plan personal or leisure/business trips**? (Select ALL that apply.)
Q10F: When you typically visit **online travel agency websites** (for example, Expedia, Travelocity, Priceline, Orbitz, etc.) to plan your personal or leisure trips, how far along are you in deciding where to go? (Select ONE.)
Affluents rely on brand.com, search and OTAs the most for planning, consistent with last year. (cont.)

SINCE 2011...

+5 pts.  -5 pts.  -8 pts.

Reliance on hotel sites  Reliance on OTAs  Reliance on destination-specific sites

Source: Ipsos MediaCT, Google Travel Study (Waves 3, 4 and 5), April to May 2011, April to May 2012 and May to June 2013. Base: Affluent 2013 N=1357

Q10: Which of the following online sources do you typically use to plan personal or leisure/business trips? (Select ALL that apply.)
Q10F: When you typically visit online travel agency websites (for example, Expedia, Travelocity, Priceline, Orbitz, etc.) to plan your personal or leisure trips, how far along are you in deciding where to go? (Select ONE.)
Travelers consider **search** just as important as brand sites in travel planning.

66% of affluent travelers rely on **search** to plan leisure travel, up from 65% in 2012.

Source: Ipsos MediaCT, Google Travel Study, May to June 2013.
Base: Affluent 2013 N=1357
Q10 Base: Use Internet to plan trips. Q: Which of the following online sources do you typically use to plan personal or leisure/business trips? (Select ALL that apply.)
Q10D: Base: Use specific sites for planning (N=154–1234) Q: And, how important do you consider each online source in planning your personal or leisure trips/business trips?
Affluents turn to **OTAs** for destination inspiration.

<table>
<thead>
<tr>
<th>50%</th>
<th>46%</th>
<th>4%</th>
</tr>
</thead>
<tbody>
<tr>
<td>are considering a <strong>few</strong> destinations.</td>
<td>know <strong>exactly</strong> where they're going.</td>
<td>are considering <strong>many</strong> destinations.</td>
</tr>
</tbody>
</table>

Source: Ipsos MediaCT, Google Travel Study, May to June 2013.
Q10 Base: Use Internet to plan trips / Q10F Base: Personal quota and plan using an OTA (N=699)
Q10: Which of the following **online sources** do you typically use to **plan personal or leisure/business trips**? (Select ALL that apply) / Q10F: When you typically visit **online travel agency websites** (for example, Expedia, Travelocity, Priceline, Orbitz, etc.) to plan your personal or leisure trips, how far along are you in deciding where to go? (Select ONE)
Affluent travelers prioritize destinations that offer activities of interest to them.

TOP FEATURES CONSIDERED MOST IMPORTANT WHEN CHOOSING DESTINATION (EXTREMELY/VERY IMPORTANT)

- Activities specific to my interests: 79%
- Price: 71%
- Past experience with destination (previously visited): 63%
- Variety of activities: 63%
- New experiences/foods/etc. to try: 61%
- Specific accommodation options available: 60%
- Able to relate to the destination on a personal level: 57%
- Recommendation from friend, family member or colleague: 51%
- Online reviews of destinations: 50%
- Promotion: 48%

Source: Ipsos MediaCT, Google Travel Study, May to June 2013.
Base: Personal Quota (N=1532)
QD10: How important are each of the following when choosing a destination for personal or leisure trips? (Select ONE for each.)
Affluents rely on both **online sources** and **on-site staff** to decide on activities once on their trip.

68% of affulent travelers rely on **online sources** for ancillary information.

**TOP SOURCES USED FOR ACTIVITIES/EXCURSIONS**

- Concierge/Staff at my accommodations: 57%
- Website/App for the destination where I am staying: 52%
- Walking around the destination or my accommodations: 47%
- Brochures/Books in my room/house: 39%
- Website/App for the accommodations where I am staying: 35%
- Other travel websites/apps: 35%
- Other people on my trip: 25%
- Others staying at my accommodations: 15%
- TV in my room/house: 14%
- Tour guides: 14%

Source: Ipsos MediaCT, Google Travel Study, May to June 2013.
QD11 Base: Personal Quota (n=1532)
QD12 Base: Personal Quota and use internet-related sources to decide on activities/excursions at destination (N=1044)
QD11: When you are on a personal or leisure trip, which sources do you typically use to decide on activities/excursions to participate in once you have **arrived** at your destination? (Select ALL that apply.)
QD12: And, when deciding on activities/excursions to participate in once you have **arrived** at your destination, on which device(s) are you accessing the information? (Select ALL that apply.)
More than half of affluent travelers (55%) access travel info on their **smartphones** or **tablets** for planning.

**DEVICES USED TO ACCESS INTERNET FOR TRAVEL INFO**
(AMONG THOSE WHO USE THE INTERNET TO PLAN TRIPS)

Source: Ipsos MediaCT, Google Travel Study (Waves 3, 4 and 5), April to May 2011, April to May 2012 and May to June 2013.

Base: Use Internet to plan trips; 2013 N=1357

Q9N: From which of the following do you access the Internet for travel-related information when planning your personal or leisure trips/business trips? (Select ALL that apply).

* Differentiated between “Smartphone” and “Mobile phone” in 2012
**Wording changed from “Mobile Device/Tablet” in 2011 to “Tablet” in 2012
Affluent travelers use **all screens** to engage in travel-related activities.

### TRAVEL ACTIVITIES DONE ON DEVICES

<table>
<thead>
<tr>
<th>Activity</th>
<th>Computer (n=1283)</th>
<th>Smartphone (n=534)</th>
<th>Tablet (n=565)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Researched an upcoming trip</td>
<td>94%</td>
<td>55%</td>
<td>77%</td>
</tr>
<tr>
<td>Looked up maps or directions</td>
<td>85%</td>
<td>81%</td>
<td>69%</td>
</tr>
<tr>
<td>Checked into my hotel, flight, cruise, etc.</td>
<td>81%</td>
<td>69%</td>
<td>49%</td>
</tr>
<tr>
<td>Read reviews of other travelers</td>
<td>79%</td>
<td>44%</td>
<td>64%</td>
</tr>
<tr>
<td>Requested more information related to an upcoming trip</td>
<td>62%</td>
<td>27%</td>
<td>36%</td>
</tr>
<tr>
<td>Watched a travel-related video</td>
<td>49%</td>
<td>21%</td>
<td>37%</td>
</tr>
<tr>
<td>Downloaded a travel-related &quot;app&quot; (application)</td>
<td>N/A</td>
<td>61%</td>
<td>49%</td>
</tr>
</tbody>
</table>

**TIP**

A multi-device strategy is no longer optional

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Source: Ipsos MediaCT, Google Travel Study, May to June 2013.

Base: Use specific device for travel research (floating)

DEVELOPMENT 1: Thinking about your **personal or leisure travel travel** in the **past six months**, on which device(s) have you done each of the following travel-related activities? (Select ALL that apply for each activity.)
Affluent travelers booking on **smartphones** do so via both browser and mobile applications.

### SMARTPHONE BOOKING METHODS

<table>
<thead>
<tr>
<th></th>
<th>Via the Internet using the browser</th>
<th>Used smartphone &quot;apps&quot; (applications)</th>
<th>Used smartphone to make a phone call to book</th>
<th>Not sure/Can't recall</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any component (Net)</td>
<td>67%</td>
<td>64%</td>
<td>48%</td>
<td>1%</td>
</tr>
<tr>
<td>Air travel</td>
<td>57%</td>
<td>67%</td>
<td>37%</td>
<td>1%</td>
</tr>
<tr>
<td>Car rental</td>
<td>56%</td>
<td>56%</td>
<td>38%</td>
<td>4%</td>
</tr>
<tr>
<td>Overnight accommodations</td>
<td>59%</td>
<td>55%</td>
<td>37%</td>
<td>4%</td>
</tr>
<tr>
<td>Vacation activities</td>
<td>64%</td>
<td>39%</td>
<td>50%</td>
<td>10%</td>
</tr>
</tbody>
</table>

**TIP**

Smartphone apps are more commonly used for bookings by affluent travelers than by personal travelers.

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Source: Ipsos MediaCT, Google Travel Study, May to June 2013.
Base: Booked on smartphone (Netted N=211; Components N=floating 27-128)

DEVICE4: Specifically, how have you booked the following on your **smartphone**? Again, please think about your personal or leisure trips. (Select ALL that apply for each component.)
Convenience is the top reason that affluent travelers book on **smartphones**. Many affluents also book last minute with their smartphones.

### REASONS FOR BOOKING ON SMARTPHONE

<table>
<thead>
<tr>
<th></th>
<th>Convenience/Device was at hand</th>
<th>I use my smartphone for everything</th>
<th>Last minute—before the trip</th>
<th>Last minute—while en route to my destination</th>
<th>Last minute—at my destination</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Air travel</strong></td>
<td>62%</td>
<td>36%</td>
<td>17%</td>
<td>15%</td>
<td>13%</td>
</tr>
<tr>
<td><strong>Car rental</strong></td>
<td>58%</td>
<td>35%</td>
<td>12%</td>
<td>13%</td>
<td>12%</td>
</tr>
<tr>
<td><strong>Overnight accommodations</strong></td>
<td>55%</td>
<td>30%</td>
<td>12%</td>
<td>23%</td>
<td>16%</td>
</tr>
<tr>
<td><strong>Vacation activities</strong></td>
<td>51%</td>
<td>39%</td>
<td>14%</td>
<td>20%</td>
<td>21%</td>
</tr>
</tbody>
</table>

Source: Ipsos MediaCT, Google Travel Study, May to June 2013.
Base: Booked on smartphone (N=27–128), *Caution: Small base size (N<50) **Base size too small to report (N<30)

DEVICES: For which reason(s) did you use your smartphone to book each type of travel? (Select ALL that apply for each component.)
Online travel video usage is increasing among affluent travelers.

55% watch travel videos online
+5 pts. since 2012
Affluent travelers turn to **online video** throughout all stages of travel.

**WHEN TRAVEL VIDEOS ARE VIEWED BY AFFLUENTS**

- when thinking about taking a trip: 60%
- when choosing a destination: 64%
- when looking for ideas of things to do at a particular destination: 67%
- when deciding on accommodations: 62%
- when deciding which website to book on: 22%

Source: Ipsos MediaCT, Google Travel Study, May to June 2013.
Affluent 2013 N=751
Q5: At what points in your travel planning process do you **view videos online**? (Select ALL that apply.)
Affluent travelers engage with all types of videos.

**TYPES OF TRAVEL VIDEOS VIEWED**

- Videos from hotels, airlines, cruises, tours, etc.: 70% (+4 pts. since 2012)
- Trip reviews from experts: 65%
- Videos from travel-related channels: 56%
- Trip reviews from people like me: 53%
- Videos made by people like me: 36%
- Commercials/Ads from companies/brands: 34%
- Videos by friends and family: 25%

Source: Ipsos MediaCT, Google Travel Study, April to May 2012 and May to June 2013.
Affluent 2013 N=751; Affluent 2012 N=740
Q6B: Specifically, what types of travel-related videos do you watch online? (Select ALL that apply.)
Videos that affluents watch extend beyond travel. Affluents engage with news content more than the typical traveler.

**TOP 10 TYPES OF TRAVEL VIDEOS EVER WATCHED ONLINE BY AFFLUENT TRAVELERS**

- 63% News
- 61% Movie clips and trailers
- 60% Full-length TV shows
- 56% Music
- 56% Humor
- 49% Full-length movies
- 49% Food
- 49% Sports
- 47% Weather
- 41% Celebrity

Source: Ipsos MediaCT, Google Travel Study, May to June 2013.
Base: Ever watch online videos (N=1398)
Q3: What types of videos have you ever watched on the Internet? (Select ALL that apply).
Travel videos **influence** and prompt action.

90% of affluent travelers take some type of action after viewing an online travel video.

<table>
<thead>
<tr>
<th>Action</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Influenced where I have decided to travel</td>
<td>62%</td>
</tr>
<tr>
<td>Inspired me to think about planning a vacation</td>
<td>46%</td>
</tr>
<tr>
<td>Prompted me to visit the website of the advertiser</td>
<td>44%</td>
</tr>
<tr>
<td>Introduced me to a travel brand/company I wasn't aware of</td>
<td>41%</td>
</tr>
<tr>
<td>Encouraged me to consider the brand that was being advertised</td>
<td>39%</td>
</tr>
<tr>
<td>Prompted me to contact the advertiser</td>
<td>19%</td>
</tr>
</tbody>
</table>

Source: Ipsos MediaCT, Google Travel Study, May to June 2013.
Base: Watched/commented on travel-related video; Affluent N=751
Q6C: Thinking about online videos, how would you say watching them has influenced the way you think about, plan, or book travel? (Select ALL that apply.)
Loyalty programs are growing in popularity among affluents.

96% of affluent travelers belong to a loyalty program (+2 pts. since 2012).

Source: Ipsos MediaCT, Google Travel Study (Waves 3, 4 and 5), April to May 2011, April to May 2012 and May to June 2013.
Base: Total Respondents; 2013 N=1655; 2012 N=1637; 2011 N=1563
C1: Which, if any, of the following types of travel-related loyalty/rewards programs do you belong to? (Select ALL that apply.)
Affluent travelers continue to join loyalty programs for financial and future perks.

**Reasons for Joining Loyalty?Reward Program(s)**

- I sign up so I can earn free flights, hotel rooms, rental cars, etc. in the future: 81% in 2013, 79% in 2012
- I took out a credit card that is tied to a loyalty program: 37% in 2013, 37% in 2012
- I sign up for a loyalty program every time I book with a new company: 28% in 2013, 27% in 2012
- I did research and decided on the best loyalty membership to have: 18% in 2013, 21% in 2012
- I did it to save money on my first purchase with a company: 16% in 2013, 18% in 2012
- I signed up to get something free (a towel, a t-shirt, etc.): 10% in 2013, 12% in 2012

Source: Ipsos MediaCT, Google Travel Study (Waves 3, 4 and 5), April to May 2011, April to May 2012 and May to June 2013.
Base: Loyalty/reward program members
LOY3: In general, why do you sign up for travel-related loyalty/rewards programs? (Select ALL that apply)
Letter indicates a significant difference from comparable group at the 95% confidence level. Only significant differences from 2013 are noted.
Affluents are **increasingly likely** to book based on loyalty program membership.

**TIP**
Ensure that your loyalty program is marketed to the right audiences

Source: Ipsos MediaCT, Google Travel Study (Waves 3, 4 and 5), April to May 2011, April to May 2012 and May to June 2013. Base: Loyalty/reward program members (floating)
C1A: And, how does being a member of the following loyalty/reward(s) program(s) impact your decision to book with a particular company? Would you say you are . . . (Select ONE for each.)
Affluents value a variety of **benefits** in airline and hotel loyalty programs.

**MOST IMPORTANT FEATURES IN LOYALTY/REWARDS PROGRAMS**

- **Ability to earn free flights, hotels rooms, rental cars, etc.**
  - Airline: 81%
  - Hotel: 74%
- **Perks**
  - Airline: 57%
  - Hotel: 60%
- **Ability to earn credit card points**
  - Airline: 30%
  - Hotel: 21%
- **Large network/Multiple routes or locations**
  - Airline: 28%
  - Hotel: 23%
- **Exclusive benefits**
  - Airline: 23%
  - Hotel: 27%
- **Cancellation or check-in/out benefits**
  - Airline: 19%
  - Hotel: 30%
- **Ability to leverage points with other companies/partner hotels**
  - Airline: 16%
  - Hotel: 18%
- **International offerings**
  - Airline: 12%
  - Hotel: 9%
- **Personalized recommendations either pre-trip or during trip**
  - Airline: 3%
  - Hotel: 4%

Source: Ipsos MediaCT, Google Travel Study, May to June 2013.
Airline N=1403; Hotel N=1272
Base (L): Airline loyalty/rewards program members
Base (R): Hotel loyalty/rewards program members
LOYS: Which of the following features are most important to you in each type of loyalty/rewards program? (Select up to three features for each program.)
Affluent travelers overwhelmingly **prefer** to get updates from loyalty programs by email.

86% of affluent travelers prefer some type of online contact/outreach.

**PREFERRED SOURCES FOR STAYING CONNECTED TO LOYALTY/REWARDS PROGRAMS**

- Email: 82%
- In person when traveling: 16%
- Direct mail: 16%
- Social media: 8%
- Online video: 6%
- TV: 6%
- Calls/800 number: 6%

Source: Ipsos MediaCT, Google Travel Study, May to June 2013.
Base: Loyalty rewards/program members (N=1505)
LOY6: How do you prefer to learn about or stay connected to the travel-related loyalty/rewards program you belong to? (Select ALL that apply.)
Google commissioned Ipsos MediaCT, 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. consumers.

Respondents completed a 20-minute attitude and usage survey on their travel habits. If qualified, users were routed to one of five in-depth sections: Airline, Cruise, Lodgings, Car Rental and Vacation Packages. Total sample size was 5,000 (3,500 personal and 1,500 business travelers). One augment was also recruited, consisting of 1,500 affluent (with $250K+ household income) travelers.

Respondents had to be 21 to 54 years old, live in the U.S., go online at least once per month and have traveled at least once for personal reasons (or a minimum of 3x for business purposes) in the past six months.

**WHAT WE DID**

How has travel planning changed this year?

What role does the Internet play in travel inspiration and planning?

How have mobile devices influenced our behavior?

How is online video used in the travel planning process?
Demographics
### Demographics – Affluent Travelers

<table>
<thead>
<tr>
<th><strong>Demographic</strong></th>
<th><strong>Affluent Travelers</strong></th>
<th><strong>Affluent Travelers</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Base</strong></td>
<td>(1563)</td>
<td>(1563)</td>
</tr>
<tr>
<td><strong>Age</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>21-24</td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>25-34</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>35-44</td>
<td>31%</td>
<td></td>
</tr>
<tr>
<td>45-54</td>
<td>27%</td>
<td></td>
</tr>
<tr>
<td>55-64</td>
<td>23%</td>
<td></td>
</tr>
<tr>
<td><strong>Gender</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>48%</td>
<td></td>
</tr>
<tr>
<td>Female</td>
<td>52%</td>
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</tr>
<tr>
<td><strong>Education</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less than College Grad</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>College Grad+</td>
<td>90%</td>
<td></td>
</tr>
<tr>
<td><strong>Children Ages 0-17</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>38%</td>
<td></td>
</tr>
<tr>
<td>No</td>
<td>62%</td>
<td></td>
</tr>
<tr>
<td><strong>Employment</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employed</td>
<td>82%</td>
<td></td>
</tr>
<tr>
<td>Retired</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>Homemaker</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>Student</td>
<td>2%</td>
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</tr>
<tr>
<td>Unemployed</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td><strong>Marital Status</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Married</td>
<td>79%</td>
<td></td>
</tr>
<tr>
<td>Single, never married</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>Living with partner</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>Divorced/Separated</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Widowed</td>
<td>1%</td>
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</tr>
<tr>
<td><strong>Ethnicity</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>White</td>
<td>81%</td>
<td></td>
</tr>
<tr>
<td>Black</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Hispanic (Net)</td>
<td>4%</td>
<td></td>
</tr>
</tbody>
</table>

**Source:** Ipsos MediaCT, Google Travel Study, May to June 2013.