

# Expedia Future of Travel

## October 2013



# Methodology:

**Dates:** August 20 to September 12, 2013

**Qualification Criteria:** Adults 18 or older and employed full-time, part-time or self-employed

**Method:** Online survey across Europe, North America, South America and Asia among 8,535 respondents

Europe Total	France	Italy	Spain	Norway	Sweden	Denmark	Ireland	Netherlands	U.K.	Austria	Germany
3,955	413	410	415	304	300	300	301	301	401	400	410
Asia-Pacific Total	India	South Korea	Japan	Australia	New Zealand	Singapore	Malaysia	Hong Kong	Thailand		
2,806	301	304	300	400	300	301	300	300	300		
North American Total *	U.S.	Canada		Mexico	Brazil						
1,054	501	553		404	316						

\*North America as presented in this report consists of the U.S. and Canada

**Weighting:** Each country was weighted using propensity scores and/or demographic data to reflect the country's employed adult population as a whole. Exceptions to this are Brazil, Thailand, Mexico, and India which were weighted to reflect the online employed populations of each country. In India, only three regions were surveyed: Delhi (n=95), Mumbai (n=100), and Hyderabad/Chennai/Bangalore (n=106). These three regions were then weighted together to reflect their population size.

For the global 24-country total, an additional post-weight was applied to adjust for the relative size of each country's adult population.

# Overall, those age 18-30 take more business trips on average each year when compared to those 31-65

*Globally, just over one third (37%) of 18-30 year olds report not taking any business trips*

## Business Travel

- ❑ In Europe, close to six in ten (59%) employees 46-65 years old do not travel for business compared to 54% of employees 31-45 years old and 48% of employees 18-30 years old. So those older Europeans that do travel, travel very frequently (more than 5 times each year).
- ❑ In Asia-Pacific, slightly less than half (45%) of employees 46-65 years old also say they do not travel for business, while just 28% of employees 18-30 years old the same. Employees 18-30 and employees 31-45 years old have similar frequency of business travel, but employees 18-30 years old take more business trips each year (5.2 mean) than those age 46-65 (2.1 mean).
- ❑ In North America, those age 18-30 take approximately 6 (mean) business trips each year, compared to 3 (mean) for those 31-45 and just under 4 (mean) for those age 46-65 years.

### Business : Trips Per Year

	(%)	Global Total	Age			Europe Total	Age			Asia-Pacific Total	Age			North America Total	Age		
			18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65
		Total	18-30	31-45	46-65	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65
Business Travel	0	44	37	43	54	55	48	54	59	38	28	31	45	54	49	46	61
	1-2	26	32	28	22	22	30	24	19	31	36	32	30	19	21	26	18
	3-4	9	11	12	9	8	8	9	7	11	13	16	11	6	10	5	8
	5+	20	19	17	15	15	14	13	15	19	23	20	14	20	20	23	13
	Mean	3.8	4.7	3.6	4.2	4.1	4	3.3	5.3	3.6	5.2	4.2	2.1	3.1	5.9	2.9	3.7

Q800: How many times a year do you travel for business? If you are not sure, please base your response on your best guess. (Base: All Qualified Respondents)

# Leisure travel varies by region

18-30 year olds take more leisure trips (4.2 mean) than those 31-45 (2.9 mean) and 46-65 (3.2 mean)

## Leisure Travel

- ❑ In Europe, employees 18-30 years old and employees 31-45 years old are more likely to travel between one and two times per year (59% vs. 58%) compared to just over half of employees 46-65 years old (51%).
- ❑ In Asia-Pacific, those age 18-30 take more leisure trips each year (4.2 mean) than those age 31-45 (3.1 mean) and those age 46-65 (2.6 mean). Older employees (46-65 years old ) are more likely than younger employees (18-30 and 31-45 years old ) to say they travel 0 times per year.
- ❑ On average, North American employees age 31-45 (2.9 mean) and 46-65 (3.5 mean) take a similar number of leisure trips a year. However, those age 18-30 take many more leisure trips a year (7.8 mean) than any segment across all regions.

### Leisure Travel: Times Per Year

	(%)	Global Total	Age			Europe Total	Age			Asia-Pacific Total	Age			North America Total	Age		
		Total	18-30	31-45	46-65	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65
Leisure Travel	0	9	7	8	10	11	7	8	10	10	5	7	10	12	17	12	11
	1-2	49	51	56	52	51	59	58	51	50	49	55	54	44	43	44	48
	3-4	22	21	21	24	22	21	20	25	23	21	21	25	20	13	25	23
	5+	19	21	16	13	16	14	14	14	17	25	17	11	24	28	19	17
	<b>Mean</b>	3.8	4.2	2.9	3.2	3.3	3	2.7	3.6	3.1	4.2	3.1	2.6	4.9	7.8	2.9	3.5

Q805: How many times a year do you travel for leisure? If you are not sure, please base your response on your best guess. (Base: All Qualified Respondents)

## Globally, the typical length of a business trip varies little across age

- Among European business travelers, those age 46-65 are more likely to take one day trips (32%) compared to employees 18-30 (24%), who are more likely to say they take three day trips (17% vs. 10%).
- In contrast to Europe, those age 18-30 in Asia-Pacific are more likely to take one day trips (22%) compared to employees 31-45 years old (14%). Those age 31-45 are more likely than 18-30 year old employees to say they travel more than three days.
- Among North Americans, there is little differentiation across age.

### Business Travel: Length of Stay

(%)	Global Total	Age			Europe Total	Age			Asia-Pacific Total	Age			North America Total	Age		
		18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65
Day trip	21	21	20	24	30	24	26	32	19	22	14	17	17	18	21	18
Overnight	26	23	24	24	24	24	26	26	32	22	23	26	24	28	20	16
Two days	20	22	23	19	20	21	25	17	18	21	21	17	17	19	22	23
Three days	18	19	18	16	13	17	12	10	16	20	20	20	25	23	23	26
Three+ days	15	15	16	17	13	14	11	16	14	15	21	20	16	13	14	17

Q810: On average, how long is your typical business trip? (Base: 1 or More Business Trips)

# Globally, hotel location is cited most often as the most important thing for booking business trips across all ages

- ❑ In Europe, 18-30 year old employees more frequently cite on-board Wi-Fi than employees 31-45 and 46-65 (16% vs. 10% vs. 6%).
- ❑ In Asia-Pacific, the overall importance of what employees look for when booking business trips remains consistent across all ages, however, employees 18-30 cite price of airfare (40%) more often than employees 31-45 (34%) and on-board Wi-Fi (12%) more often than 31-45 (8%) and 46-65 year olds (4%). Those age 46-65 are more likely to cite upgraded seats (10%) compared to employees 18-30 (6%).
- ❑ There is little variation across age groups within North America. However, brand or loyalty programs for airfare/hotel are most popular among 31-65 year olds (those age 46-65 equally cite hotel programs).

## Top Three Most Important Things When Booking Business Trips

(%)	Global Total	Age			Europe Total	Age			Asia-Pacific Total	Age			North America Total	Age		
		Total	18-30	31-45		46-65	Total	18-30		31-45	46-65	Total		18-30	31-45	46-65
Hotel location	53	49	52	51	49	42	47	48	56	53	54	51	49	42	44	56
Price of hotel room	44	41	42	40	43	38	44	36	45	41	39	45	38	34	41	32
Travel time, direct flights or layovers	42	43	45	45	42	43	43	45	47	45	50	47	38	36	33	46
Price of airfare	36	37	39	41	35	36	41	39	34	40	34	43	35	28	39	42
Flight times	27	32	31	29	24	28	26	28	27	36	38	31	32	29	33	31
Staying in a nice or luxurious hotel	16	16	16	13	17	19	15	15	13	13	15	12	16	17	14	13
On-board wi-fi on the plane	10	14	9	6	10	16	10	6	8	12	8	4	10	12	9	6
Preferred brand or loyalty programs for airfare	10	9	10	10	8	7	7	8	9	10	11	12	15	9	18	11
Preferred brand or loyalty programs for hotel	9	7	8	8	7	7	6	7	7	7	8	8	17	6	16	15
Upgraded seats/extra legroom on the plane	8	6	8	8	7	8	7	5	9	6	8	10	5	4	7	10

Q815: When booking business trips, what are the three most important things you look for? (Base: 1 or More Business Trips)

# Hotel price, hotel location and airfare are most important for leisure travelers

- ❑ Europe and Asia-Pacific: There are few differences across age ranges. In Asia-Pacific, those age 18-30 are more likely to cite Wi-Fi compared to 31-45 year olds and 46-65 year olds (8% vs. 5% vs. 3%). In Europe, 18-30 year olds are also more likely than 46-65 year olds to cite Wi-Fi (5% vs. 2%). On the other hand, 46-65 year olds are more likely to cite travel time than 18-30 year olds (38% vs. 32%).
- ❑ In North America, travel time is more important to 46-65 year olds (40%) compared to those age 31-45 (26%) or 18-30 (23%), while 31-45 year olds more frequently cite loyalty programs for hotels (16%) than 46-65 year olds (9%) and 18-30 year olds (6%). While also in the single digits, on-board Wi-Fi is more important to 18-30 year olds (7%) and 31-45 year olds (5%) than 46-65 year olds (1%).

## Top Three Most Important Things When Booking Leisure Travel

(%)	Global Total	Age			Europe Total	Age			Asia-Pacific Total	Age			North America Total	Age		
		Total	18-30	31-45		46-65	Total	18-30		31-45	46-65	Total		18-30	31-45	46-65
Price of hotel room	63	59	61	58	63	60	63	56	65	59	60	61	62	55	59	60
Hotel location	50	49	51	50	50	47	51	50	58	50	53	51	44	44	44	46
Price of airfare	50	54	57	58	55	58	59	58	46	53	58	57	53	53	56	62
Travel time, direct flights or layovers	33	32	34	38	33	32	34	38	39	35	37	37	30	23	26	40
Staying in a nice or luxurious hotel	25	25	24	24	26	28	25	27	18	22	20	19	21	21	20	20
Flight times	19	22	19	21	18	21	17	19	16	23	23	24	23	20	21	23
Preferred brand for loyalty programs for hotel	9	6	7	6	5	6	4	4	8	6	9	9	14	6	16	9
Preferred brand for loyalty programs for airfare	7	7	6	6	4	5	3	3	8	9	8	10	8	6	10	8
On-board wi-fi on the plane	6	8	5	2	4	5	4	2	6	8	5	3	5	7	5	1
Upgraded seats/extra legroom on the plane	6	6	5	6	5	5	4	5	6	5	6	8	5	8	5	5

Q820: When booking leisure trips, what are the three most important things you look for? (Base: All Qualified Respondents)

# Just over half (54%) of employees have extended a business trip into a vacation (traveling alone for business part and/or having family member or friend join them)

- ❑ Across all regions, younger employees are more likely to say they have extended a business trip into a vacation than those age 46-65.
- ❑ This trend is most prominent in North America where 54% of 18-30 year olds say they have extended a business trip, but traveled alone for the business part compared to just 29% in Europe and 38% in Asia-Pacific.

## Extended Business Trip

(%)	Global Total	Age			Europe Total	Age			Asia-Pacific Total	Age			North America Total	Age		
		18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65
No	46	38	49	63	70	56	67	78	37	31	33	45	45	30	50	69
Yes, but I've travelled alone for the business part	32	36	29	18	18	29	18	12	38	38	38	26	37	54	36	16
Yes, and I've had a family member or friend join me	28	33	26	20	13	19	16	11	31	39	36	31	29	30	23	18

Q825: In the past year, have you extended a business trip into a personal holiday, vacation or getaway? (Base: 1 or More Business Trips)



# Globally, four in ten employees are equally careful about spending money on business or personal vacations

*Employees 18-30 are equally divided about their spending habits on business and leisure travel*

- ❑ Europeans age 46-64 (61%) are more likely to say they are equally careful about spending money than 18-30 year olds (40%), while 18-30 year olds (33%) and their counterparts age 31-45 (24%) are more careful about spending money on personal vacations than 46-65 year olds (13%).
- ❑ A similar trend is seen in Asia-Pacific where over four in ten age 46-65 (47%) and 31-45 (42%) say they are equally careful about spending money compared to one third (35%) of those age 18 to 30. Additionally, one-third of those age 18-30 (33%) and 31-45 years old (34%) are more careful about spending money on personal trips than 46-65 year olds (26%). 18-30 year olds are also more careful than 31-45 year olds when it comes to spending money on business trips (32% vs. 25%).
- ❑ North Americans age 18-30 are least likely to say they are equally careful about their spending when on business or leisure trips.

## Money Spending Habits: Business vs. Leisure

Global (%)	Global Total	Age			Europe Total	Age			Asia-Pacific Total	Age			North America Total	Age		
		18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65
I am equally careful about spending money when travelling for business or leisure	42	35	45	54	51	40	48	61	37	35	42	47	47	27	49	54
I am more careful about spending money on business trips	34	34	28	28	26	27	28	26	34	32	25	27	24	36	22	21
I am more careful about spending money on personal vacations	25	32	27	19	23	33	24	13	29	33	34	26	29	37	29	25

Q830: Do you consider yourself more careful about spending money when you are on a business trip (business expense) or on personal vacation (personal expense)? (Base: 1 or More Business Trips)

# When on business trips, employees are more likely to spend additional money on food when compared to their personal vacations

Generally, younger employees (18 to 30) spend more on business trips than their older peers across the board, older employees are more likely to indicate that they do not to spend more on anything

- ❑ In Europe, the only category that 18-30 year olds are not more likely to spend extra money on compared to either 31-45 or 46-64 year olds are extra legroom seats. Younger employees in Asia Pacific are also not more likely to spend additional money on extra legroom seats, along with baggage check fees and wine/alcohol.
- ❑ There is less variability in North America by age than in Europe or Asia-Pacific. However, those age 31-45 are more likely to spend on hotel upgrades (32%) and wine/alcohol (29%) than 46-65 year olds.

## Likelihood to Spend Additional \$ on Business Trips

(%)	Global Total	Age			Europe Total	Age			Asia-Pacific Total	Age			North America Total	Age		
		18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65
	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65
High-end meals/dinners	36	42	37	26	30	36	32	22	30	44	39	25	29	34	37	30
Room service	32	37	30	21	16	20	18	11	30	42	37	25	27	32	26	26
Hotel room upgrades	23	27	25	18	17	25	18	18	25	29	31	18	26	21	32	16
Baggage check fees	21	24	19	17	14	23	14	12	19	24	23	20	23	28	16	20
Wine/alcohol	19	21	17	13	10	16	10	8	21	22	20	16	19	19	29	12
Upgrade to first class/business class	18	22	19	12	14	20	12	11	17	24	25	12	20	20	18	11
Extra legroom seats	15	14	15	13	12	11	12	13	15	15	17	11	14	11	10	15
Limo/town car services	13	20	15	10	8	12	8	7	19	27	24	13	11	11	13	13
None of these	25	14	24	36	36	24	34	43	27	11	18	30	28	10	26	36

Q835: Which areas, if any, are you more likely to spend additional money when on a business trip (company money) that you wouldn't do on personal vacation (when spending your own money)? Please select all that apply. (Base: 1 or More Business Trips)

# A strong majority say loyalty programs are at least somewhat important when it comes to booking their flight (69%) or hotel (71%)

- ❑ In Europe, younger employees (18 to 30) are more likely to say these programs are at least somewhat important to them compared to older employees.
- ❑ Those age 18-45 in North America and Asia-Pacific are also more likely to say these programs are important but there is closer alignment between 18-30 year olds and 31-45 year olds in Asia-Pacific.

## Importance of Loyalty Programs

(%)	Global Total	Age			Europe Total	Age			Asia-Pacific Total	Age			North America Total	Age		
	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65
<b>( top 3 ) Flight</b>	69	77	66	58	49	63	49	45	75	82	82	73	69	77	73	66
Very important	18	20	14	12	7	11	6	7	17	20	21	16	19	22	18	18
Important	25	28	25	20	17	23	18	16	29	32	32	24	22	24	23	19
Somewhat important	26	29	27	26	25	29	25	22	29	30	29	33	28	31	32	29
<b>( top 3 ) Hotel</b>	71	78	67	57	51	64	52	46	70	83	80	69	74	83	76	67
Very important	19	21	16	11	9	13	9	7	14	22	18	13	22	20	23	19
Important	25	31	24	19	17	24	17	16	27	34	32	22	22	34	24	15
Somewhat important	27	26	27	27	25	27	26	23	29	27	30	34	30	29	29	33

Q840/845: How important are loyalty programs to you when it comes to booking your flight/hotel? (4 pt scale) (Base: All Qualified Respondents)

# Most employees feel entitled (83%) to their travel reward points

Globally, those age 18-30 and 31-45 tend to feel more entitled to their points than older employees

- ❑ Younger Europeans are more likely to say they feel somewhat entitled compared to 46-65 year olds (79% vs. 58%).
- ❑ There is less variability in Asia-Pacific and North America at the aggregate level (top 3 box).

## Entitlement to Travel Rewards

(%)	Global	Age			Europe	Age			Asia-	Age			North	Age		
	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65	Pacific	18-30	31-45	46-65	Total	18-30	31-45	46-65
( top 3)	83	86	80	72	66	79	67	58	86	87	87	84	84	88	83	84
Very entitled	30	29	25	23	18	20	19	17	25	27	24	21	31	31	37	41
Entitled	37	37	38	31	29	34	29	25	39	40	45	38	42	36	32	29
Somewhat entitled	16	20	17	18	19	25	19	16	22	20	18	25	11	21	14	14

Q850: To what extent do you feel entitled to claim your air/hotel travel rewards points when you are traveling for business purposes? (4-pt scale with d/k option)  
 (Base: 1 or More Business Trips)

# Although reward point entitlement is strong, one quarter don't have them

*Younger employees are more likely to say their employer keeps them, while 46-65 year olds are more likely to say they don't have reward points.*

- ❑ This trend holds true in Europe, however, younger employees are also more likely to say they keep their rewards (51%) compared to 31-45 year olds (42%) and 46-65 year olds (41%).
- ❑ In Asia-Pacific, younger employees (45 and below) are more likely to say their employer keeps their rewards compared to 46-65 year olds.
- ❑ In North America, 18-30 year olds (25%) are more likely to say their employer keeps their rewards points. However, those age 46-65 (82%) are more likely than all ages and regions to say they keep their rewards.

## Travel Reward Claim: Employee vs. Employer

(%)	Global Total	Age			Europe Total	Age			Asia-Pacific Total	Age			North America Total	Age		
		18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65
	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65
I keep them	60	57	56	54	43	51	42	41	65	59	65	62	67	56	69	82
My employer keeps them	15	19	16	11	15	20	18	9	14	18	17	11	14	25	10	7
I don't have rewards points for any hotels or airlines	25	24	28	35	42	30	40	50	21	23	18	27	19	19	20	12

Q855: Are you currently allowed to keep your own air/hotel travel rewards points, or does your employer claim them? (Base: 1 or More Business Trips)

# Globally, seven in ten (68%) work the same amount (29%) or more (39%) on business trips

Employees 18-30 year olds are more likely to say they work fewer hours (36%), while a similar percentage of those age 46-65 (36%) say they work the same amount of hours

- ❑ This trends hold true in Europe, Asia-Pacific and North America.
- ❑ Overall, Europeans (45%) are more likely than employees in Asia-Pacific (35%) or North America (32%) to say they work more hours.
- ❑ North Americans 31-65 years old are more likely to say they work the same compared to 18-30 year olds.

## Business Trips and Workload

Global (%)	Global Total	Age			Europe Total	Age			Asia-Pacific Total	Age			North America Total	Age		
		18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65
I work more hours when I travel than when I'm at the office	39	38	41	42	45	41	44	46	35	37	37	36	32	42	35	38
I work fewer hours when I travel than when I'm at the office	32	36	30	22	25	32	26	17	40	38	35	30	31	38	25	22
I work about the same amount of hours when I travel as when I'm at the office	29	25	29	36	30	28	29	37	24	25	27	34	37	20	39	40

Q860: How do business trips impact your workload? (Base: 1 or More Business Trips)

# A majority (68%) of employees are compensated for their business trips on nights and weekends

Across all regions, 18-30 year olds are least likely to say they are not compensated with either money or days/hours (22%) compared to nearly half (45%) of those age 46-65

- ❑ In Europe those age 31-45 are equally divided across all three response categories.
- ❑ In Asia-Pacific 18-30 year olds and 46-65 year olds are equally likely to say they are compensated with days/hours for personal use.
- ❑ In North America, 18-30 year olds and 31-45 year olds are more likely to say they are compensated with money (52% vs. 46%) compared to 46-65 year olds (27%).

## Business Trips and Workload

Global Total	Age			Europe Total	Age			Asia-Pacific Total	Age			North America Total	Age		
	18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65
38	43	38	24	34	41	33	23	36	45	43	25	45	52	46	27
30	35	29	30	32	37	33	30	35	34	27	34	21	30	22	21
32	22	33	45	34	22	35	47	29	21	30	41	34	18	31	52

Q865 : Does your employer compensate you for business travel on nights and weekends? (Base: 1 or More Business Trips)

# A majority save some type of personal information to streamline the travel booking process, however one-third of employees still do not save any data online

*Overall, older employees are more likely to say they do not save personal data online compared to younger employees*

- ❑ In Europe, younger employees (18-30 years old) are more likely to save most personal data online than their older counterparts.
- ❑ In Asia-Pacific, those age 18-30 and 31-45 share similar practices and are more likely to save personal data online than those age 46-65.
- ❑ Overall, those in Asia-Pacific are more likely to save personal data than Europeans and North Americans.

(%)	Global Total	Age			Europe Total	Age			Asia-Pacific Total	Age			North America Total	Age		
	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65
Email	54	57	52	48	47	52	46	44	60	63	60	53	44	40	49	45
Mobile Phone	39	48	39	33	30	38	29	29	53	60	55	42	23	29	25	19
Home Address	32	33	30	27	28	33	26	26	41	37	36	30	27	23	31	27
Loyalty Program/Rewards #	24	21	21	18	12	15	12	11	24	25	28	21	33	21	32	28
Work Phone	24	25	23	16	14	17	13	12	25	30	30	22	18	17	24	14
Credit card #	22	22	21	16	13	14	14	12	28	26	27	21	22	22	29	16
Work Address	22	25	21	15	13	18	14	11	26	30	30	21	15	16	18	11
Passport #	17	22	18	13	12	17	11	10	24	29	29	20	8	12	10	5
I don't save any personal data online for travel booking	33	25	34	44	43	33	43	49	21	16	23	34	45	40	37	51

Q875: What personal data do you save online in order to streamline the travel booking process, either for leisure/personal or business trips? (Base: All Qualified Respondents)



# Offering incentives would entice employees to store or save additional personal data on travel related websites

Overall, those age 46-65 are least likely to store/save additional personal information compared to their younger peers

- ❑ Across the three regions, those in Asia-Pacific are generally more likely to store additional personal information compared to Europeans and North Americans.
- ❑ In Europe and Asia-Pacific, 18-30 year olds are more likely to be enticed to save data online by free Wi-Fi compared to those age 31-45 and 46-65.
- ❑ North Americans age 18-30 are more likely than those age 46-65 to be enticed by additional loyalty points (20% vs. 12%) and free Wi-Fi (18% vs. 3%).

## Likelihood to Store Personal Data

(%)	Global Total	Age			Europe Total	Age			Asia-Pacific Total	Age			North America Total	Age			
		18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65	
( top 3)	Total	73	80	71	62	59	70	61	54	85	88	85	77	68	72	73	54
	Very likely	18	21	15	11	9	13	10	7	18	26	19	14	16	18	16	12
	Likely	31	36	30	25	25	33	25	21	45	40	39	37	24	29	26	15
	Somewhat likely	24	23	26	26	25	24	26	26	22	22	27	26	28	25	31	27

## Incentives to Store/Save Personal Data

(%)	Global Total	Age			Europe Total	Age			Asia-Pacific Total	Age			North America Total	Age			
		18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65	
	Total	42	46	46	41	39	44	44	40	47	49	50	45	37	38	43	36
	Discounts on flights/hotels	14	13	15	13	14	13	14	11	16	16	17	14	16	12	12	17
	Free upgrades	14	13	11	10	8	11	8	7	17	14	12	14	15	20	13	12
	Additional loyalty points	10	15	8	5	7	13	5	4	9	14	9	7	10	18	14	3
	Free WiFi	21	13	21	31	33	19	29	38	12	8	12	20	22	11	18	32
	None of these																

Q880: How likely would you be to store or save your personal data on travel related websites if incentives (i.e., discounts, extra loyalty points, free upgrades, etc.) were offered by the websites? (4-pt scale)

Q885: Which of these would be most enticing to influence you to store or save more of your personal data on a travel website. (Base: All Qualified Respondents)

# Overall, three in four (75%) use Smartphones, Tablets or both for personal or business reasons

*18-45 year olds are more likely to use Smartphones or both Smartphones and Tablets than 46-65 year olds*

- While Asia-Pacific follows the global pattern, in Europe those age 18-30 are more likely than 46-65 year olds to use Smartphones (52% vs. 43%), while those age 18-30 and 31-45 are both more likely (25% each) to use both Smartphones and Tablets compared to those age 46-65 (16%).
- In North America, half (52%) of employees 18-30 year olds use Smartphones compared to just 39% of 31-45 year olds and 35% of 46-65 year olds. Those age 31-45 are more likely to use Smartphones and Tablets (31%).

## Use of Mobile Devices for Business or Leisure

Global (%)	Global Total	Age			Europe Total	Age			Asia-Pacific Total	Age			North America Total	Age		
		18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65
I use a Smartphone	45	53	48	42	45	52	47	43	50	56	53	43	40	52	39	35
I use both a Smartphone and Tablet	22	26	28	17	20	25	25	16	18	27	29	17	23	21	31	17
I use a Tablet	8	8	9	8	8	8	9	8	7	8	9	8	8	10	10	9
I do not use either	25	13	16	33	26	15	20	33	25	10	10	32	29	17	19	40

Q890: Do you use a Smartphone or Tablet for personal or business reasons? Please choose all that apply. (Base: All Qualified Respondents)

# Personal computers are the most frequently chosen method to book travel

*Similar to Smartphone and Tablet usage, younger employees more frequently cite using their Smartphone and Tablets for booking travel than older employees*

- ❑ The global trend stands true for all regions, with the exception of North America where Tablet usage for leisure travel is similar across all three age groups.
- ❑ Generally, employees in Asia-Pacific are more likely to use travel agents than employees in Europe and North America for both leisure and business travel.
- ❑ Those age 18-45 in Asia-Pacific and 18-30 in North America are more likely to use Smartphones for business and leisure travel compared to all age groups in Europe. Those age 18-30 in Asia-Pacific are the most likely to use Smartphones for leisure trips.

## Use of Mobile Devices for Business and Leisure Travel

(%)	Global Total	Age			Europe Total	Age			Asia-Pacific Total	Age			North America Total	Age		
		18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65
<b>Business</b>																
Computer	69	68	66	65	67	67	66	64	69	66	64	64	73	66	67	68
TMC	31	28	32	33	24	20	24	27	35	33	39	41	25	26	27	29
Smartphone	27	32	25	12	14	22	15	10	31	38	33	14	31	41	29	11
Tablet	16	20	16	9	12	18	14	8	15	21	19	8	18	21	19	10
Did not travel	8	8	7	11	11	10	10	14	6	7	5	8	7	8	9	11
<b>Leisure</b>																
Computer	66	65	68	65	65	67	71	66	67	65	65	63	68	55	64	66
TMC	20	22	21	22	17	17	14	19	27	26	31	28	11	13	20	18
Smartphone	18	27	17	7	8	15	9	5	24	37	25	12	18	26	20	5
Tablet	11	14	12	7	7	11	10	6	9	17	15	6	11	11	12	9
Did not travel	18	14	15	20	21	14	16	20	15	10	12	19	21	26	20	22

Q895: In the last year, through which of the following devices has your business? Please choose all that apply. (Base: 1 or More Business Trips)

Q900: In the last year, through which of the following have you booked personal travel? Please choose all that apply. (Base: All Qualified Respondents)

# Among business travelers who use their Smartphone and/or Tablet, a strong majority use their mobile devices for travel purposes

*18-45 year olds are more likely than 46-65 year olds to use these mobile devices for business travel purposes*

- This trend is consistent across all three regions.
- Overall, employees in Asia-Pacific are more likely to say they use their Tablets and Smartphones than other age groups and regions.

## Mobile Device for Booking Travel/Monitoring Itineraries

(%)	Global Total	Age			Europe Total	Age			Asia-Pacific Total	Age			North America Total	Age		
	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65
Yes	77	80	78	61	65	70	69	53	82	86	84	73	72	79	76	49
No	23	20	22	39	35	30	31	47	18	14	16	27	28	21	24	51

Q905: Do you use one of your personal mobile devices (i.e., Smartphone or Tablet) for business travel purposes, such as for booking travel and monitoring itineraries? (Base: 1 or More Business Trips and Use Smartphone or Tablet)

# Smartphones are most often used to plan a trip or sharing a trip when traveling

*Unsurprisingly, 18-30 year olds and 31-45 year olds more frequently cite using their Smartphone for travel than 46-65 year olds*

- Generally, those age 18-45 in Asia-Pacific are more likely to use a Smartphone during the travel process than Europeans and North Americans.
- In Europe, the only area where 18-30 year olds are on par with 46-65 year olds is in their use of Smartphones to edit their trip when their traveling.
- There are fewer significant differences in North America than in Europe and Asia-Pacific. However, those age 18-45 are still more likely than 46-65 year olds to say they use their Smartphone to share about their trip after their back, to book a trip and to edit their trip when their traveling.

## Smartphone for Booking Travel/Monitoring Itineraries

(%)	Global Total	Age			Europe Total	Age			Asia-Pacific Total	Age			North America Total	Age		
		18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65
	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65
Planning a trip	40	49	39	26	30	40	29	23	49	62	50	31	39	37	43	25
Sharing my trip when I'm traveling	36	40	34	23	19	25	23	17	38	49	42	32	31	28	33	25
Sharing about my trip after I'm back	30	34	26	19	16	20	16	12	27	40	33	26	28	31	33	16
Booking a trip	29	35	26	17	16	22	16	12	38	45	36	24	24	31	24	10
Editing my trip when I'm traveling	23	24	21	13	10	14	11	10	28	32	31	18	21	22	25	10
I haven't used my Smartphone for travel	27	18	29	45	44	30	42	53	22	9	18	33	30	22	23	52

Q910: What part of the travel process have you used your Smartphone for (check all that apply)? (Base: Use Smartphone)

# Travel reviews are important for consumer and business travelers

- ❑ In Europe and Asia-Pacific younger employees are generally more likely to say that travel reviews are more important to them as consumers than those age 46-65. However, in North America there is little variation in importance across the different age groups for consumer reviews.
- ❑ Travel reviews for business are also important, but slightly less so than consumer. These reviews are more important for business travelers age 18-30 in Europe and 18-45 in both Asia-Pacific and North America.

### Importance of Travel Reviews

(%)	Global	Age			Europe	Age			Asia-Pacific	Age			North	Age		
	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65
<b>( top 2 box) Consumer</b>	79	82	81	71	76	80	77	67	79	85	86	74	78	78	82	76
Very important	32	36	31	21	25	32	25	20	27	36	35	19	31	34	35	24
Somewhat important	47	47	50	50	51	48	52	48	51	49	51	55	47	44	47	52
<b>( top 2 box) Business Traveler</b>	75	77	73	65	65	71	62	57	73	79	81	72	76	74	75	64
Very important	32	33	28	20	18	22	17	14	28	37	32	21	32	37	28	19
Somewhat important	43	44	46	46	47	50	45	43	45	43	49	51	44	37	47	45

Q915: How important are travel reviews to you as a consumer? (Base: All Qualified Respondents) (4-pt scale)

Q920: How important are travel reviews to you as a business traveler ? (Base: 1 or More Business Trips) (4-pt scale)

# Negative reviews: most (67%) do not post negative reviews, those that do tend to focus on hotels and restaurants – primarily during leisure trips

Those age 18-30 tend to post more negative reviews than older employees across all regions.

- ❑ Across all regions, those age 18-30 are the most likely to post a negative review.
- ❑ While there is little differentiation across the age ranges in Europe and Asia-Pacific concerning the type of trip they are posting a negative comment about (leisure, business or both), in North America, those age 46-65 who do post are more likely to post about leisure (77%).

## Negative Reviews Posted

Global Total	Age			Europe Total	Age			Asia-Pacific Total	Age			North America Total	Age			
	18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65	
Total	18-30	31-45	46-65	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65	
Hotels	22	17	11	13	18	13	11	17	23	22	12	17	20	17	12	
Restaurants	19	16	8	11	15	12	6	14	22	19	8	14	14	18	10	
Flights	15	9	5	5	10	5	3	9	17	13	5	7	15	10	2	
Public transportation	14	8	4	4	9	5	3	9	17	11	4	4	7	5	1	
Taxis	11	6	2	3	7	3	1	7	13	10	4	4	5	5	0	
Rental cars	9	6	2	3	5	3	1	6	10	9	2	5	12	7	1	
I haven't posted a negative review	67	55	68	81	74	60	73	83	70	53	62	79	74	62	72	82

## Type of Travel Review Posted

Global Total	Age			Europe Total	Age			Asia-Pacific Total	Age			North America Total	Age		
	18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65		18-30	31-45	46-65
Total	18-30	31-45	46-65	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65
Leisure	54	54	61	70	70	68	69	47	47	46	52	49	45	50	77
Business	17	16	18	12	12	12	14	19	18	15	17	19	27	10	12
Both	29	30	20	19	18	19	17	33	35	39	30	32	29	40	12

Q925: In the past year, for which of the following have you written/posted negative comments, posted a negative travel review or a negative social media post about a travel-related experience? (Base: All Qualified Respondents)

Q930: If you posted, for which type of the following travel? (Base: Posted Negative Review)

# Positive reviews: Globally, just over half have not posted a positive travel review, those that do focus on hotels and restaurants – again during leisure trips

Similar to negative reviews, 18-30 year olds tend to post more often than travelers age 46-65

- Similar to the behaviors seen in posting negative reviews, those age 18-30 are the most likely to post a positive comment.
- Moreover, younger employees in Asia-Pacific are generally more likely to post positive reviews compared to their peers in Europe and North American.
- While those age 46-65 may be least likely to post a positive comment, when they do it is typically about leisure travel across all regions.

## Positive Reviews Posted

(%)	Global Total	Age			Europe Total	Age			Asia-Pacific Total	Age			North America Total	Age		
	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65
Hotels	31	38	33	24	25	30	28	23	33	45	40	25	25	30	28	20
Restaurants	26	33	26	15	18	23	21	13	27	40	32	16	25	25	25	17
Flights	14	21	14	6	7	16	6	5	15	24	21	9	10	17	15	4
Public transportation	6	10	6	3	3	6	4	2	8	14	10	4	4	9	5	0
Rental cars	6	8	6	2	3	6	3	2	6	10	7	4	6	8	10	1
Taxis	6	8	5	2	3	6	3	1	6	8	8	4	5	6	5	1
I haven't posted a positive review	55	41	53	68	63	49	59	70	53	35	45	66	63	55	62	73

## Type of Travel Review Posted

(%)	Global Total	Age			Europe Total	Age			Asia-Pacific Total	Age			North America Total	Age		
	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65	Total	18-30	31-45	46-65
Leisure	52	52	56	70	71	65	71	78	51	50	47	58	48	38	49	79
Both	36	37	35	21	24	26	24	16	35	41	42	31	43	43	45	16
Business	12	11	9	9	5	9	5	5	14	10	11	11	9	19	5	5

Q935: In the past year, for which of the following have you written/posted praise, posted a positive travel review or a positive social media post about a travel-related experience? (Base: All Qualified Respondents)

Q940: If you posted, for which type of the following travel? (Base: Posted Positive Review)



# Employees typically do not post on social media and similarly, do not expect a response.

*Whether they have posted or not, those age 18-30 are divided between those that would expect a response to a post (49%) and those that would not (50%).*

- ❑ In Europe, 18-30 year olds are more likely to say they have posted a review than 46-65 year olds (30% vs. 15%). Those age 46-65 are more likely to say they have not posted and do not expect a response compared to 31-45 and 18-30 year olds (54% vs. 46% vs. 39%).
- ❑ Similar to Europe, those age 46-65 in Asia-Pacific are more likely to say they have not posted and do not expect a response (42%) compared 31-45 year olds (26%) and 18-30 year olds (24%). One the other hand, 18-45 year olds are more likely to say they have posted a review and expect a response compared to 46-65 year olds.
- ❑ Consistent with Europe and Asia-Pacific, North American employees between 46-65 year olds are more likely to not post and not expect a response (52% ) than 18-30 year olds (39%).

## Review Feedback Expectations

(%)	Global Total	Age			Europe Total	Age			Asia-Pacific Total	Age			North America Total	Age		
		Total	18-30	31-45		46-65	Total	18-30		31-45	46-65	Total		18-30	31-45	46-65
I <u>have not</u> posted about a customer service issue and wouldn't expect a response	40	31	37	50	50	39	46	54	35	24	26	42	47	39	43	52
I <u>have not</u> posted about a customer service issue but would expect a response	28	27	30	29	30	31	31	31	28	26	27	29	22	21	26	26
I <u>have</u> posted about a customer service issue and don't/didn't expect a response	17	19	16	11	12	17	12	8	19	20	23	16	19	23	14	14
I <u>have</u> posted about a customer service issue and expect a response	16	22	17	9	9	13	11	7	19	30	24	13	13	17	16	8

Q945: Do you expect travel suppliers (hotel, airline, car service) to respond to a social post about your travel for a customer service issue? (Base: All Qualified Respondents)