



Hey Big Spenders! Elite Traveler Insights

Based on Travel Trends of June-November 2015

ADARA has identified, through data driven research, that marketers should challenge how they target Elite Travelers. Contrary to the industry's view, the Elite Traveler conducts a higher number of searches prior to booking flights and hotels compared to non-Elite Travelers (94% vs 76%, respectively) and has a much wider booking window as a consequence.

ADARA has also found that Elite Travelers will drop luxury to secure the right location for their needs. As a result, if targeted correctly, Elite Travelers will be receptive to deals, packages and paid for upgrades. ADARA is able to provide marketers with this unique insight into an elusive yet valuable audience through its proprietary technology and unique data set.

Elite Travelers are identified as those that have purchased a business or first class airline ticket and/or have stayed at a luxury hotel in the past six months. On average they travel twice as much as non-Elite Travelers with a high average daily rate spend for hotels compared to non-Elite Travelers. This makes the target group extremely valuable to marketers. Travel industry assumptions of the target group are that they have existing knowledge of flight routes and are less price-sensitive, therefore requiring a shorter timeline for the booking period and making them harder to reach. However, ADARA's data analysis shows this is not necessarily the case.

This report shows that Elite Travelers are receptive to relevant marketing and actually have a longer search window than previously assumed. Having strong creative that talks to this audience and their dynamics will improve marketers' engagement with this hard to reach audience group.

What Makes an Elite Traveler?

- Elite Travelers make up 10% of the travel market
- Gender - They are predominantly male (70%) in comparison to Non-Elite Travelers (53%)
- Up in the Air - On average, they take 8.6 flights and 6.4 hotel stays annually, which is nearly double compared to 3.4 and 3.6 respectively among Non-Elite Travelers
- Bigger spenders – their average daily rate (ADR) for hotels is \$212 vs. \$174 among Non-Elite Travelers

Reaching and engaging Elite Travelers

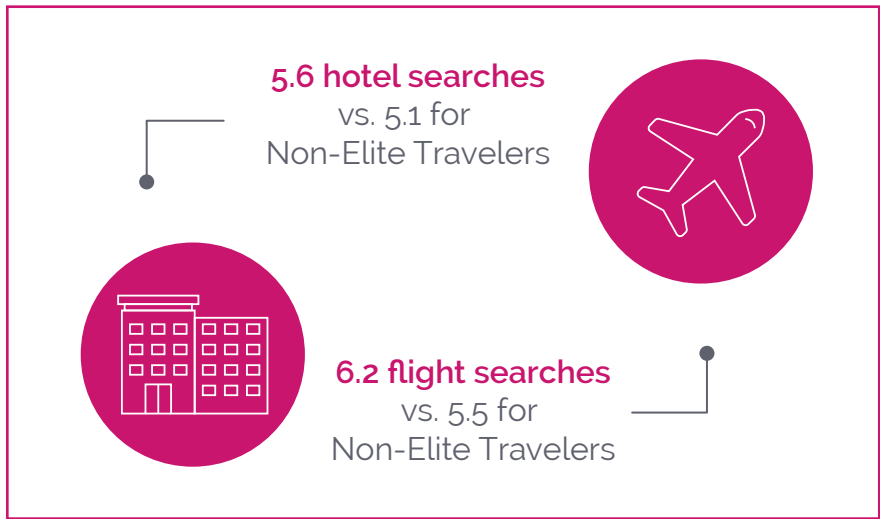
Elite Travelers have a longer search process than Non-Elite Travelers. This provides a longer window of opportunity for marketers to reach and engage with them during their planning mode, in addition to the benefit of their larger budget.

As illustrated below, you can see that Elite Travelers typically begin planning eight days before committing to a flight booking and a lengthy 32 days before departure date. Data insight also shows they search for around four days before picking a hotel booking, which happens after they have booked their flights and 23 days prior to their trip, meaning that Elite Travelers are receptive to marketing and will engage if the deals and packages meet their requirements. This is a much larger window in comparison to non-Elite Travelers who typically begin searching six days prior to booking flights and around 30 days until their flight departure. Hotels are researched two days before booking a flight.

Trip Planning Time

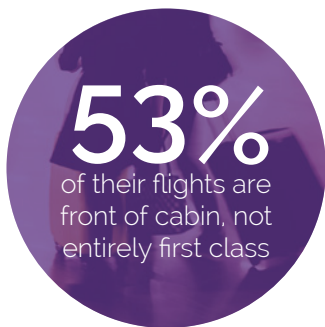


Elite Travelers have also been revealed as conducting a higher number of searches prior to purchasing flights and hotels, (94% vs. 76%) and are more likely to search directly on hotel and airline sites (95% vs. 84%). This means they are far more receptive to individual and packaged deals provided by the airline or hotel.



Elite doesn't have to mean out of reach

Elite Travelers tend to prefer first class travel and luxury hotels; however, their primary factor upon booking where to stay is location. As the data illustrated below shows, they are not averse to flying economy or staying in mid-tier/full service accommodation in order to secure the specific location they require – 53% of Elite Traveler flights are front of cabin and not entirely first class and 54% do not stay only at luxury hotels. Therefore, the valuable Elite Traveler group is still receptive to relevant marketing efforts which help them achieve the destination they desire.



Where Are Elite Travelers Going?

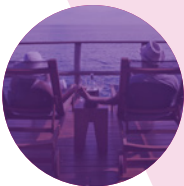
Top Ten Traveler Destinations



Solo Elite Travelers' top destinations include:

- 1 Atlanta, GA, US
- 2 New York, NY, US
- 3 Chicago, IL, US
- 4 Minneapolis, MN, US
- 5 Los Angeles, CA, US
- 6 Detroit, MI, US
- 7 Washington, DC, US
- 8 San Francisco, CA, US
- 9 Dallas-Fort Worth, TX, US
- 10 Las Vegas, NV, US

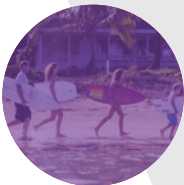
- Atlanta, New York, Chicago are top solo destinations
- These top destinations for Solo Elite travelers are the same for their Non-Elite counterparts
- Washington DC, San Francisco, Seattle and Houston are ranked higher in top 20 for Elite Vs. Non-Elite
- London, GB ranks 19th among elite travelers and is not in the top 20 destinations for non-elite travelers



Elite Traveler Couples' top destinations include:

- 1 New York, NY, US
- 2 Atlanta, GA, US
- 3 Las Vegas, NV, US
- 4 Los Angeles, CA, US
- 5 Orlando, FL, US
- 6 San Francisco, CA, US
- 7 Minneapolis, MN, US
- 8 Fort Lauderdale, FL, US
- 9 Chicago, IL, US
- 10 Detroit, MI, US

- Paris, the city of love, makes it into the top 20 (in addition to London)
- San Francisco is higher than among Non-Elite Travelers
- Salt Lake City features as a top 20 destination for the winter months



Elite Traveler Families' top destinations include:

- 1 Orlando, FL, US
- 2 New York, NY, US
- 3 Atlanta, GA, US
- 4 Los Angeles, CA, US
- 5 Cancun, MX
- 6 Fort Lauderdale, FL, US
- 7 Salt Lake City, UT, US
- 8 Las Vegas, NV, US
- 9 London, GB
- 10 Miami, FL, US

- Salt Lake City ranks higher than with their Non-Elite counterparts (most likely as a ski destination)
- Honolulu, Hawaii makes the top 20 for Elite Traveler Families only, as a key vacation destination
- Cancun, Mexico and Miami, Florida also feature as top holiday destinations for Elite Traveler Families

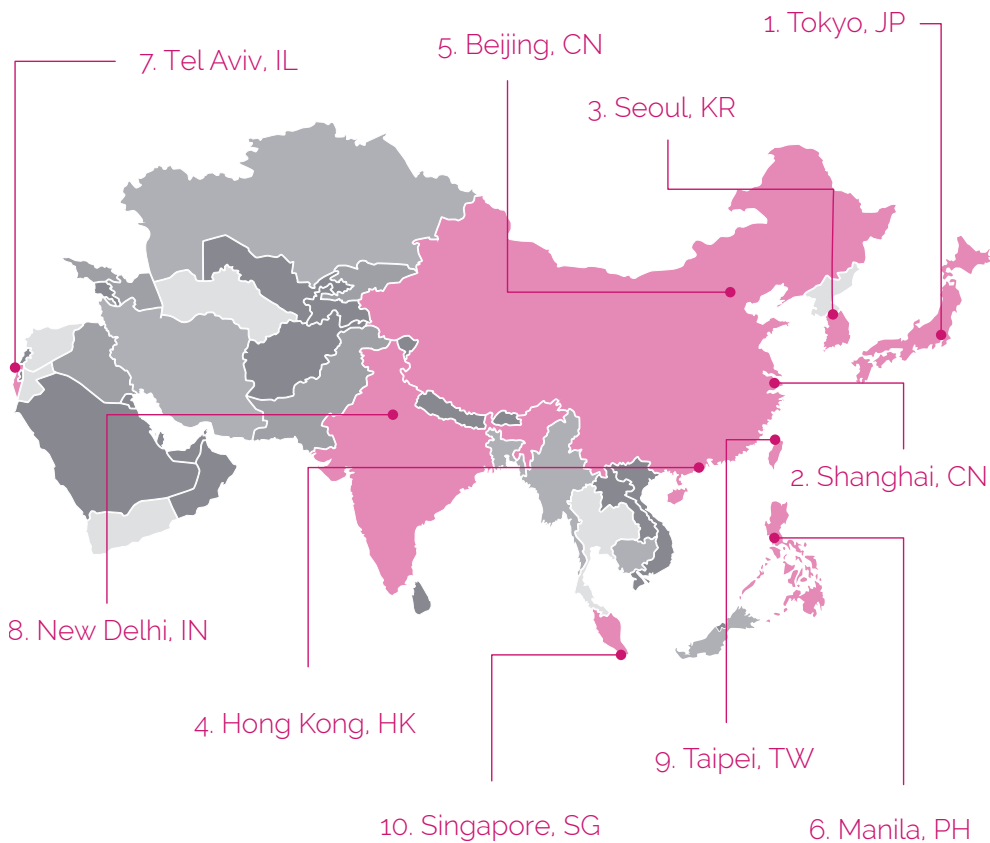
International Travel

Elite Travelers are shown to venture far and wide across the globe, with Asia and the Middle East both proving popular destinations. With the ability to analyze data geographically, ADARA identified the top destinations for Elite Travelers flying into Europe and Asia.

Top Destinations in Asia

Top long haul destinations for both Elite and Non-Elite travelers include Tokyo (Japan), Shanghai (China) and Manila (The Philippines). Locations favored by Elite Travelers included Guangzhou (China), Moscow (Russia) and Tokoname (Nagoya, Japan) which all featured exclusively in the Elite Traveler Top 20 Destinations.

Top Ten Elite Traveler Destinations in Asia



Top Destinations in Europe

The top European destinations are London (England), Paris (France) and Amsterdam (The Netherlands). Zurich (Switzerland) and Nice (France) were also common flight routes, both for holidays and as key business destinations. Less common locations vs. Non Elite travelers were Barcelona (Spain), Milan (Italy), Dublin (Ireland), Madrid (Spain) and Athens (Greece).





Key Takeaways

- Elite Travelers are reachable, they will engage and spend more time searching for deals and locations prior to booking than Non-Elite Travelers
- Elite Travelers conduct more searches prior to booking than Non-Elite Travelers, both for flights and hotels
- Elite Travelers will book second-tier hotels if luxury options are not available, despite luxury usually being their first choice, location is key
- Elite Travelers research flights three to four weeks before they depart, giving marketers a large window of opportunity to engage with them. Additionally, they tend to search for flights separately from hotels, so can be enticed by luxury package deals
- Elite Travelers venture far and wide with Asia and the Middle East both proving popular destinations
- Elite Travelers are not unreachable, and are open to price plans and deals

Methodology

ADARA's transactional travel data is based on its relationships with over 175+ of the world's top travel brands. ADARA is in a unique position to assess real-time travel searches and determine what patterns in the data reveal about the past travel season, to help marketers determine how such trends will impact future travel.

All data in this report refers to searches and bookings during the period of Monday 1st June-Monday 30th November 2015.

ADARA is the world's travel data co-op providing a unique holistic understanding of travel patterns, trends and behavior. It's a safe and secure way to share and analyze historical and real time data about more than 500 million monthly unique traveler profiles from more than 175 of the world's top travel brands.

The ADARA data co-op fuels three core business areas: Advertising, Measurement & Analytics and Traveler Intelligence. Together they provide unparalleled access to insights and knowledge allowing travel marketers to increase marketing efficiency, maximize revenues and grow their brands.

Let's Travel Together

ADARA is headquartered in Palo Alto, California and has 20 offices across North America, Europe, Middle East and Asia Pacific. Partners include Marriott, Accor, Etihad, United, American, Delta and Hertz. For more information visit ADARA.com or follow us on Twitter [@adaraglobal](https://twitter.com/adaraglobal)