



# ALTIANT LUXURY TRAVEL SNAPSHOT

October 2018

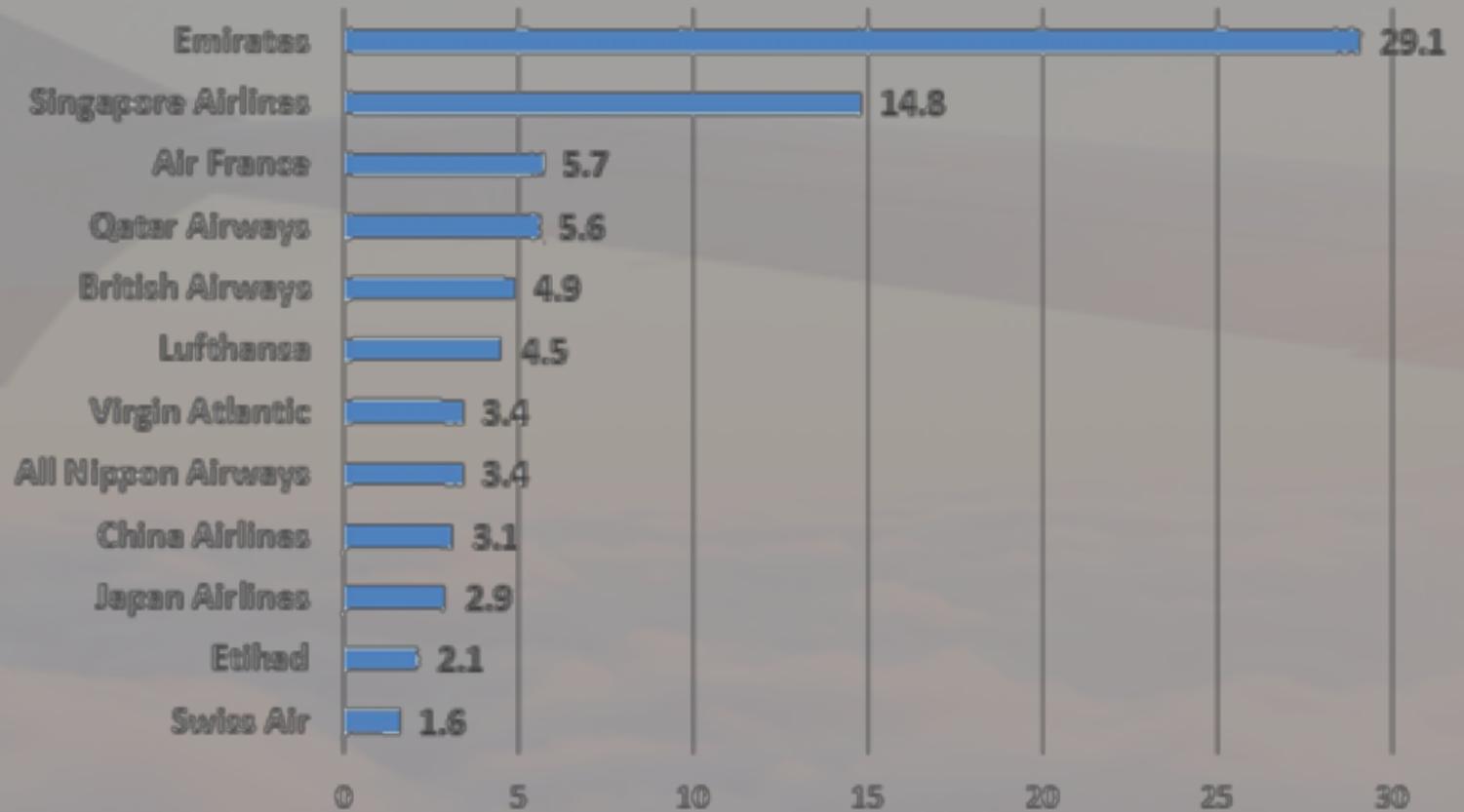
## CONTEXT

- This snapshot report is part of Altiant's Category Surveys, short questionnaires submitted to our in-house panel of affluent and High Net Worth Individuals, LuxuryOpinions®. This version explores **the Luxury Travel Market**.
- The aim was to assess our panel's sentiments and interactions with the luxury travel market and its associated brands. The quantitative online survey for this report was carried out during **summer 2018**, and used **1,000** members from various countries across our online affluent community.
- **45%** of this sample was aged 18-39, while **55%** was aged 40+. The gender split was **50:50%** male:female. In order to gain a proxy median household income of **€418,199** for this survey, we converted the respondents different currencies to Euros as of August 2018.
- A positive trend for the airline industry is noted among our affluent base, **42%** of our respondents plan to travel more for business or leisure within the next year compared to last year, with 18-39s significantly more likely than over-40s to do so (52% vs 35%). **Half** of respondents plan to travel about the same; rising to 57% among over-40s; while only **8%** expect to travel less within the next year.

## EMIRATES LEADS THE WAY FOR LUXURY AIRLINE BRAND AWARENESS

*“When thinking about luxury airlines, which is the first brand that comes to mind?”*

- Emirates was the most cited airline for top of mind awareness, with 29% of our global affluent respondents naming it as the first luxury airline brand which came to mind.
- Singapore Airlines was the only other airline to achieve a response of over 10% (15%), driven by Asian respondents (see next slide).
- A wide variety of brands are mentioned scoring 6% or below such as Air France and Qatar (6%), British Airways and Lufthansa (5%), and Virgin and ANA (3%).

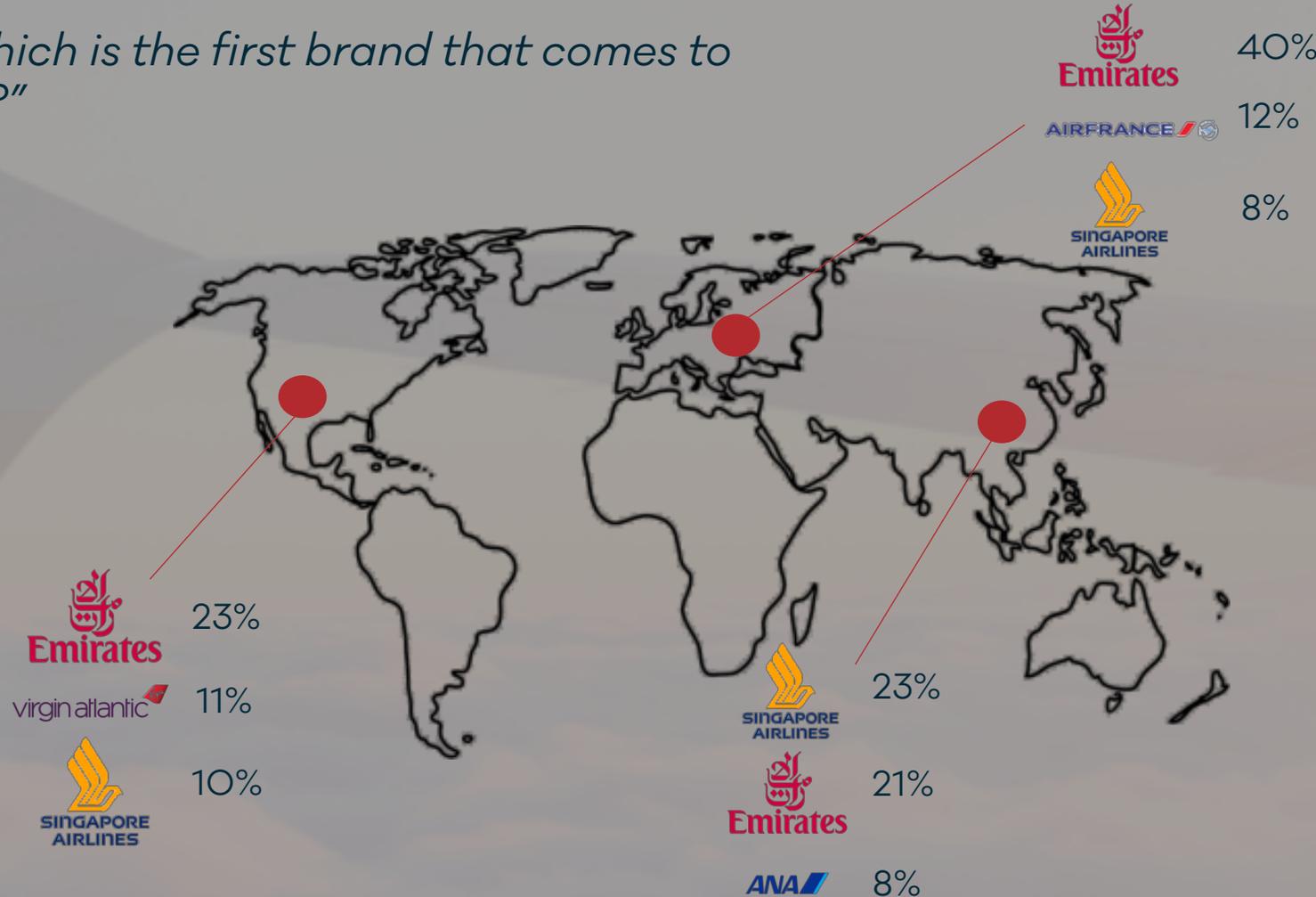


Base: 1,000 global HNWIs Source: LuxuryOpinions/Altiant

# EMIRATES' BRAND AWARENESS BUILT IN EUROPE

*"When thinking about luxury airlines, which is the first brand that comes to mind?"*

- Europeans were more likely than average to cite **Emirates (40%)** and **Air France (12%)** as the first airline brands which come to mind.
- Awareness of **Singapore Airlines** and **ANA** were particularly elevated in Asia (**23%** and **8%** respectively), while **Virgin (11%)** and **Delta (8%)** were more likely than average to be cited by Americans.



## CONSISTENT HIGH LOGO RECOGNITION AMONGST SELECTED AIRLINE BRANDS

*“Now we would like to know how familiar you are with the brands that provide high end air travel. Please indicate which brand you think the following logos belong to.” [% correctly identified]*

- Some **38%** of our panel state that brand name is **very important** to them when choosing which airline to fly with, falling to **44%** who state it is **somewhat important**. Brand name is unimportant to only 6% of our panellists.
- All of the selected airline brands' logos were recognised by **over 50%** of our panel. **Emirates** has the most recognisable logo, with **61%** identifying it when given a list 11 airlines to choose from.
- Closely behind, the logos for **Singapore Airlines** and **British Airways** were recognised by **60%** and **55%** respectively of our panellists. 16% mistook the British Airways logo for Air France.
- Some **51%** of our panellists identified both **Etihad** and **Qatar Airways**. Perhaps understandably given its use of Arabic letters, Etihad was also sometimes mistaken for Emirates (16%) and Qatar Airways (10%).

Emirates



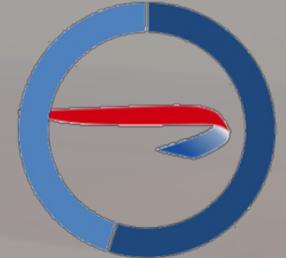
61%

Singapore Airlines



60%

British Airways



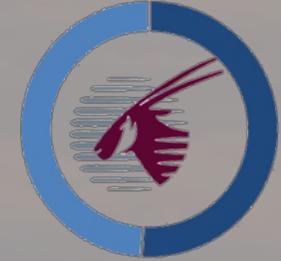
55%

Etihad



51%

Qatar Airways

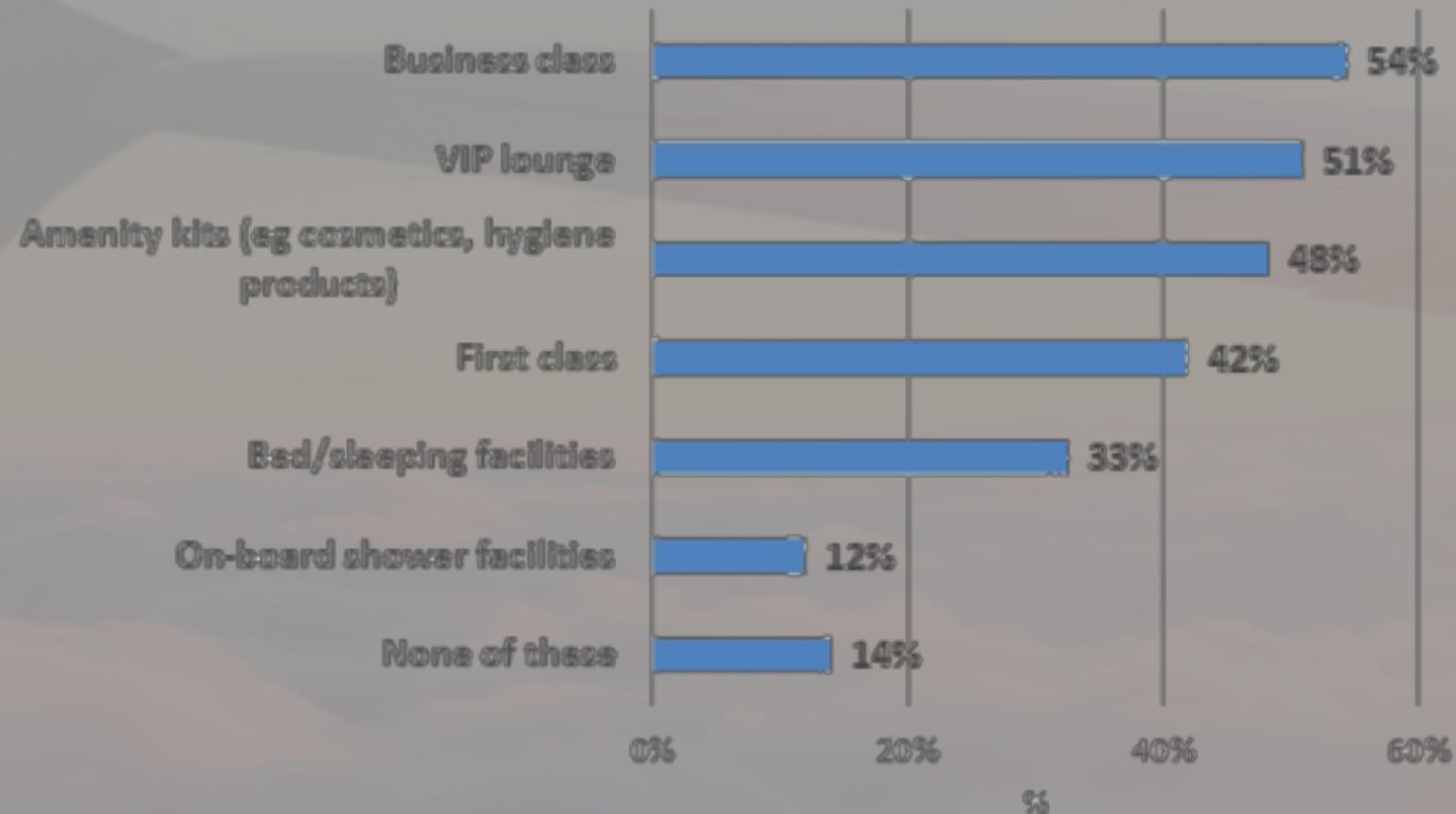


51%

## USE OF LUXURY FLIGHT SERVICES/FACILITIES

*“Which of the following services/facilities have you used when flying for business or leisure within the past year? Please select all that apply.”*

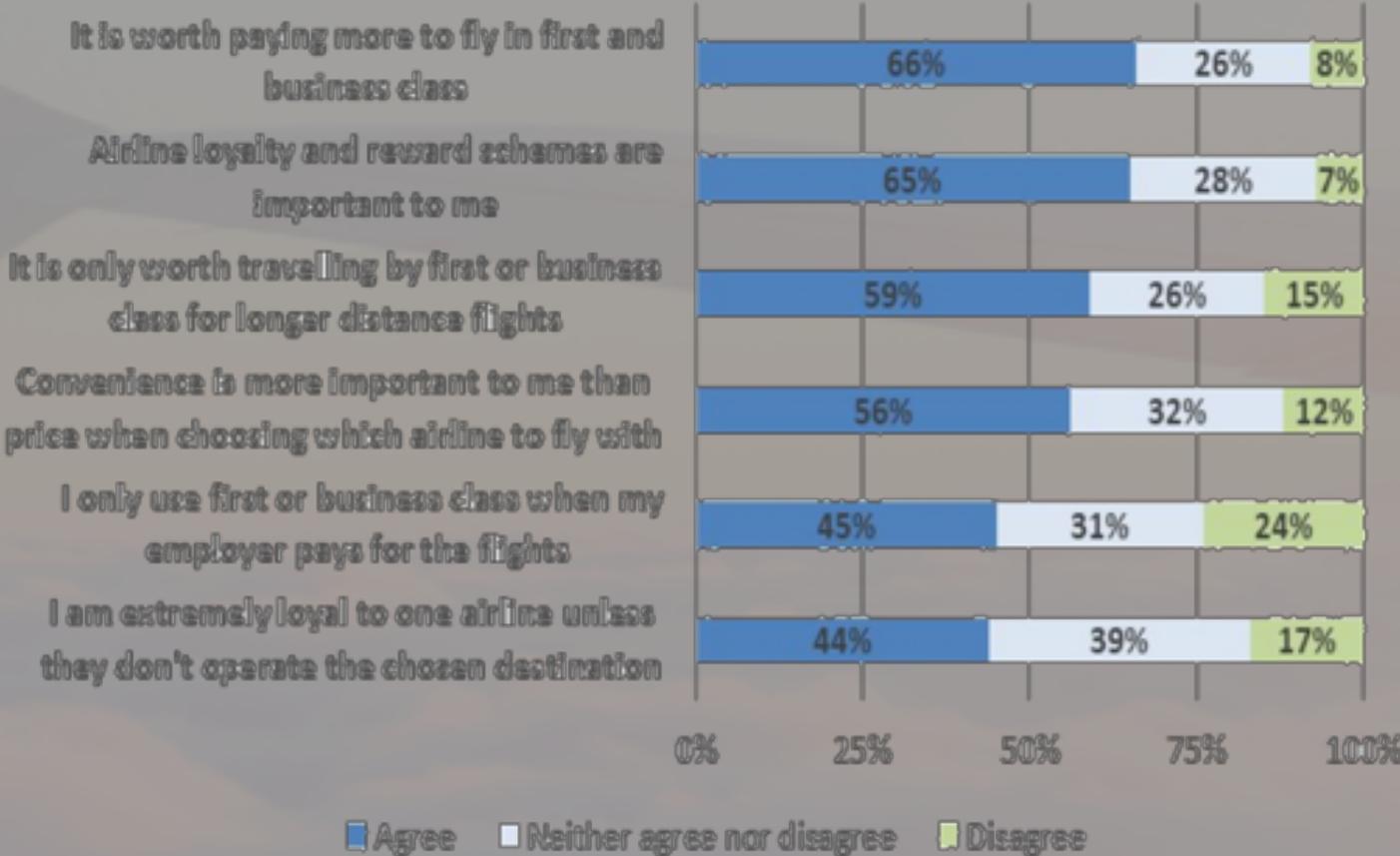
- Some **54%** of our panellists report to having travelled by business class within the past year, falling to **42%** among first class. 18-39s are significantly more likely than over-40s to do so in both cases.
- A number of services/facilities are commonly used by our panellists, with **VIP lounges** the most widely used (**51%**). **Amenity kits** are also popular with our panel and were used by **48%**, with women more likely than men to use them.
- A number of airlines are focusing on passenger comfort and upgrading sleeping and refreshment facilities. This seems wise, with **33%** of our HNWI panellists using **bed/sleep facilities** and **12%** **on-board showers** within the past year.



## AGREEMENT WITH STATEMENTS ON LUXURY AIRLINES AND TRAVEL

*“Do you agree or disagree with the following statements about airlines and travel?”*

- Some **two thirds** of our panellists believe that it is **worth paying more** to fly in first and business class. However, this may be most pertinent for longer-haul flights as **59%** believe that it is only worth using these for long-haul destinations.
- Cost may also play a part as **45%** only use these premium classes when their employer is footing the bill! Nevertheless, **convenience trumps price** for **56%** of our panellists when choosing their airline.
- **Airline loyalty schemes** are important to **two thirds**. There is a fairly high degree of loyalty as **44%** are extremely loyal to one airline unless they do not operate to the desired destination. However, **39%** neither agree nor disagree with this statement, indicating a relatively looser brand commitment.



## LUXURY TRAVEL PATTERNS

*“How often have you travelled and used commercial accommodation for business/leisure in the past 12 months?”*

- The majority of our panel **travel regularly** for both business and leisure. Respondents are more likely to travel **short** distances for leisure (**88%**) than for business (**80%**), and are most likely to do so 1-5 times per year.
- Longer-haul business flights** are undertaken by **76%** of our panel, with the majority doing so 1-5 times per year. A higher share – **85%** – do so for leisure purposes.
- The vast majority (**95%**) of our respondents have stayed in a **hotel, resort or private/serviced location**, falling to **87%** for business. A quarter do so around 5-10 times per year, while just under a half do so 1-5 times per year.

<i>B=Business L=Leisure</i>	1-5 times		5-10 times		More than 10 times		Never	
	B	L	B	L	B	L	B	L
Taken a short-distance flight (eg around 2 hours or less)	47%	58%	21%	21%	13%	9%	20%	12%
Taken a longer distance flight (eg more than 2 hours)	50%	61%	17%	17%	9%	7%	24%	15%
Stayed in a hotel/resort/private or serviced location	43%	54%	25%	25%	19%	16%	13%	5%

Base: 1,000 global HNWIs Source: LuxuryOpinions/Altiant

## DATA SOURCE

LuxuryOpinions® is a global community of Affluent and High Net Worth Individuals (HNWIs) designed to facilitate research in the luxury goods and wealth management industries. LuxuryOpinions is a division of Altiant, a European Insight company.

Our members are recruited by invitation only and primarily join to voice their opinions about topics that matter to them and to help luxury companies build better, more suitable products and services. By joining, members can also network with one another in a safe, private environment while earning amazing rewards.

Our LuxuryOpinions members are carefully selected before being invited to join the community. For every respondent, we conduct a manual validation to verify beyond reasonable doubt their identity and earning/wealth potential.

## ABOUT ALTIANT

Altiant is a specialised fieldwork company which enables large scale, global research among **affluent consumers/High Net Worth Individuals (HNWIs)** in 15+ countries worldwide.

By servicing dozens of the world's top luxury and wealth brands, Altiant helps renowned brands and their research agencies to answer critical questions among this very hard-to-reach demographic. We ensure that all of our survey respondents are genuinely affluent by having their identities **verified** and wealth levels **validated**.

Altiant is a corporate member of **ESOMAR**, the World's leading association for standards & Ethics within market research. Altiant adheres to, and abides by their strict guidelines governing the best practice in the industry.

## PROJECT PORTFOLIO EXAMPLES

Some of our recent projects combining work with both prestigious brands and well recognised agencies.

### Multi Country Ad Tracking

- Client: Major Global Wealth Company
- Markets: CN, DE, HK, IT, JP, SG, CH, TW, UK
- Sample size: >1,000 split across all markets
- Respondents: Investible assets >\$1m/\$5M/\$10M

### Continuous Global Brand Tracking

- Client: Major Global Wealth Company
- Markets: UK, US, HK, SG & DE
- Sample size: >1,000 split across all markets
- Respondents: Investible assets >\$1m
- Interview length: 12 minutes

### Multi Country Consumer Research

- Client: Major Global Luxury Group
- Markets: US, FR, CH, JP
- Sample size: 400 interviews per country
- Respondents: Brand buyers of specific Luxury category items
  - 15%: Spend €2-5k
  - 35%: Spend €2-10k
  - 40%: Spend €10-25k
  - 10%: Spend > €25k
- Interview length: 20 minutes

### Market Segmentation

- Client: Major Global Luxury Group
- Markets: UK, US, Japan
- Sample size: 1,000 interviews per market
- 5%, 3%, 1% plus category consumer quotas
- Interview length: 16 minutes

### Brand Tracker

- Client: Major Global Wealth Company
- Sample size: 400 interviews in UK
- Respondents: Investible assets of
  - 50%: Investible assets \$500k-\$1m
  - 50%: Investible assets +\$1m
- Interview length: 15 minutes

### Multi Country Ad hoc

- Client: Luxury Automotive Brand
- Sample size: 900 interviews across 6 countries including UK
- Respondents: Owners of 12 specific luxury brands
- Interview length: 8 minutes

# CONTRIBUTORS

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