

TRAVEL TRENDS 17

A VIEW OF THE LUXURY TRAVEL INDUSTRY THROUGH OUR DATA DRIVEN LENS

LuggageFree



TRAVEL TRENDS 17

Our clients ask us to send their luggage all over the globe – to and from 114 countries last year – and they come to us through many different channels. From strategic corporate partnerships to referrals and recommendations from many of the world’s leading travel advisors, our acquisition channels are as diverse and wide ranging as our clients themselves.

This large funnel allows us a unique view on the trends and preferences of the luxury traveler, and it’s a vantage point that remains largely independent of the inherent bias that can often be found when looking at this segment.

It becomes quickly obvious, for example, that luggage shipping is especially attractive to leisure travelers, especially families, skiers, golfers, cruisers, and those who value convenience and luxury above most else. Where they travel often depends on the season in which they are traveling, and the type of travel on which they are embarking.

Have a look and see for yourself. I hope you find the data and trends as interesting, informative and fun as we did. Most of all though, I hope you find it inspirational...inspiring new areas of focus, new opportunities, and new ideas.

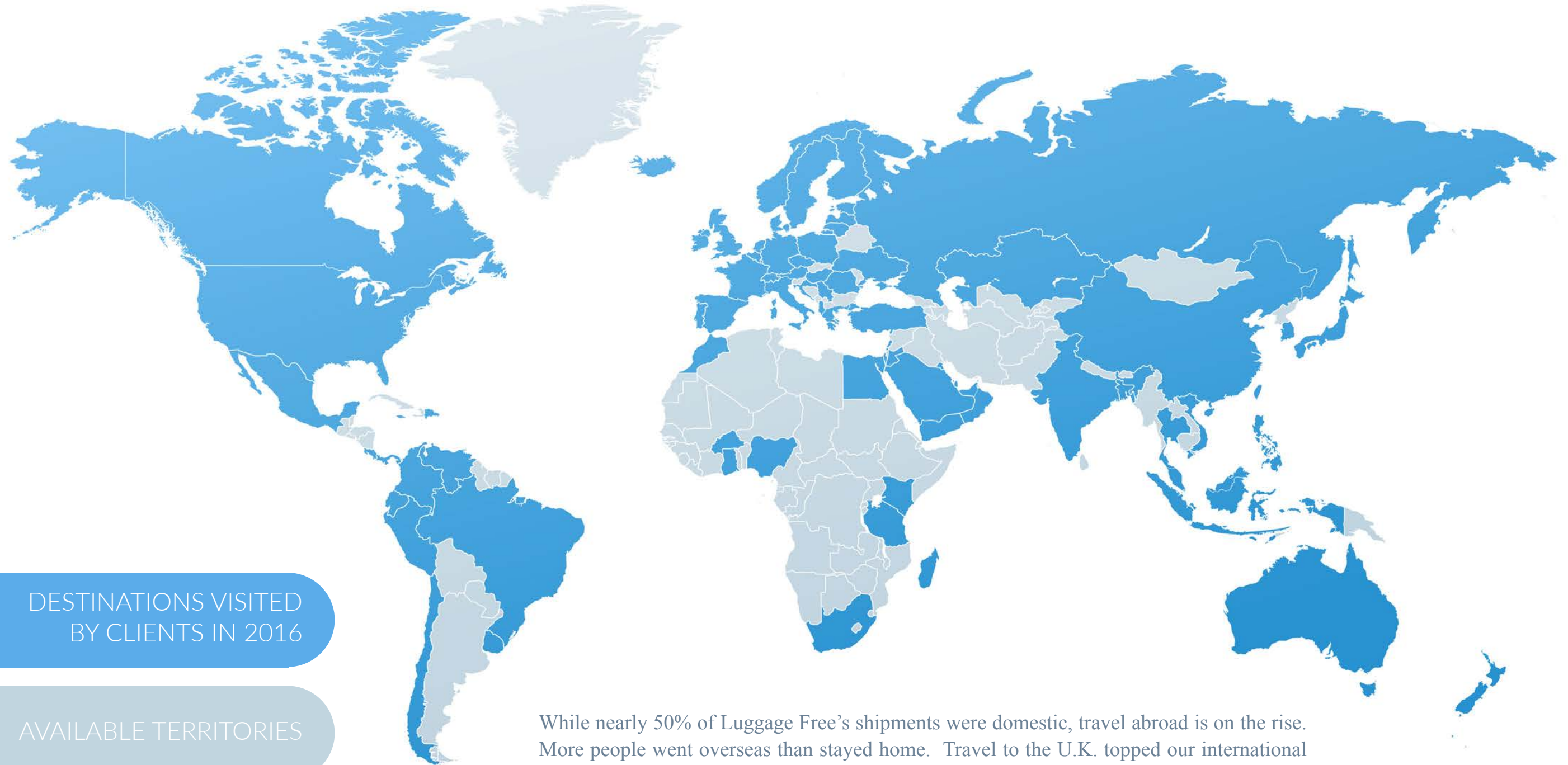
I would love to hear from you! How do these trends measure up with what you are seeing? Does anything surprise you? What advice would you offer?

A handwritten signature in blue ink, appearing to read "Jeff Boyd".

Jeff Boyd
PRESIDENT

Jeff@luggagefree.com | www.luggagefree.com

LUGGAGE FREE REACHES **A GLOBAL MARKET**



While nearly 50% of Luggage Free's shipments were domestic, travel abroad is on the rise. More people went overseas than stayed home. Travel to the U.K. topped our international list and we were able to add 11 countries to our roster this year.

GROWTH



**43%
INCREASE**

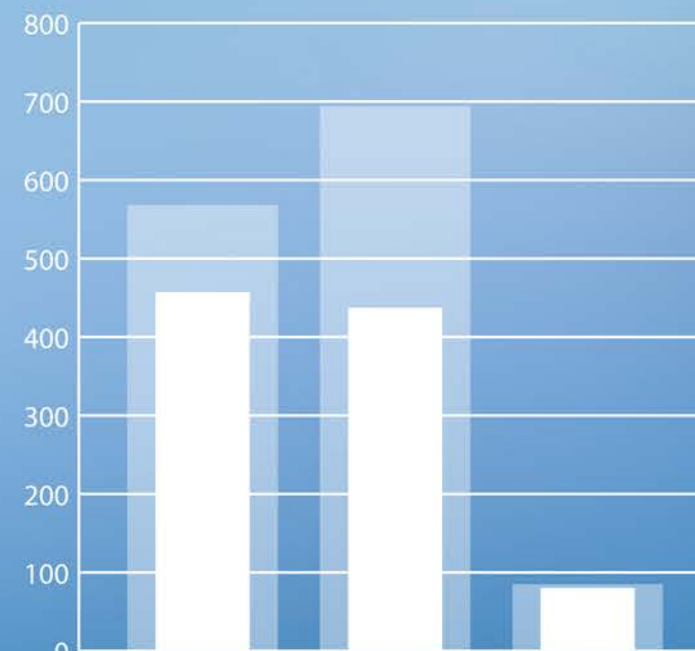
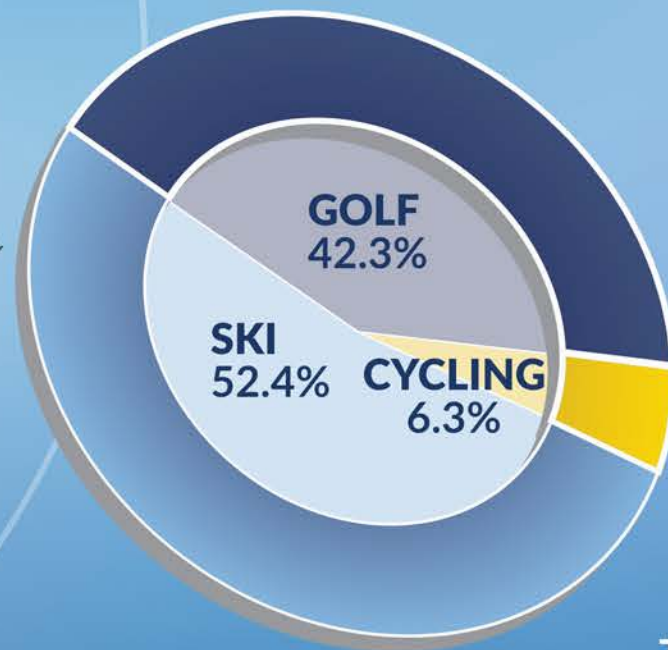
PERSONAL LUGGAGE

Luggage Free shipped 15,001 pieces of luggage in 2015, and 21,582 in 2016, for an increase of 43%



SKI SHIPPING

surpassed golf and luggage this year, having the greatest increase of 58%, compared to a 43% increase in luggage, 24% increase in golf bags, and just 5% increase in bicycle shipping



TRIPS

GOLF

SKI

CYCLING

IN TOTAL LUGGAGE FREE MADE

10,147

SHIPMENTS IN 2016

7,989 IN 2015 FOR A

27%

ANNUAL GROWTH RATE



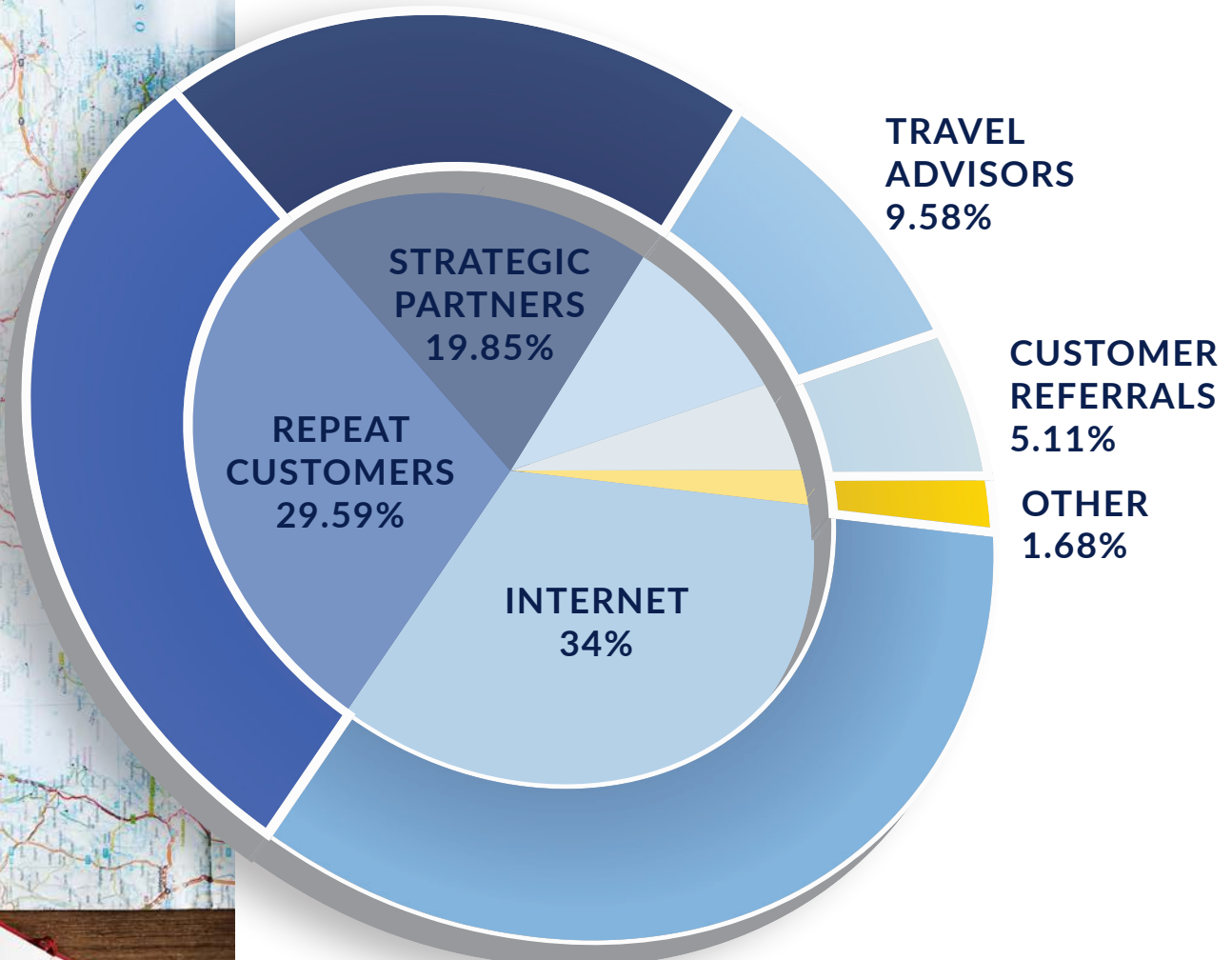
INTERNATIONAL TRIPS

outpaced domestic for Luggage Free clients this year. Last year 52% of our trips were domestic, this year only 49%



BRAND AWARENESS REFERRALS

While a third of our clients find Luggage Free on their own accord through online searches, almost 30% of our clients return as repeat customers. Equally important to us is the many loyal travel partners we have developed over the years by consistently providing the highest white glove service.





DESTINATIONS

IN 2016 WE SHIPPED LUGGAGE TO:

50

STATES

114

COUNTRIES

2586

CITIES

DESTINATION	RANK	CHANGE IN RANK 2015-16	PERCENTAGE OF INTERNATIONAL TRIPS
U.K.	1	↔	17.35%
ITALY	2	↔	11.41
FRANCE	3	▲1	9.42
CANADA	4	▼1	8.24
SPAIN	5	↔	6.00
AUSTRALIA	6	↔	5.63
GERMANY	7	▲1	3.51
SWITZERLAND	8	▲1	2.77
IRELAND	9	▼2	2.33
SINGAPORE	10	▼3	2.05
NEW ZEALAND	11	▲1	1.99
NETHERLANDS	12	▲6	1.65
GREECE	13	▲2	1.65
PORTUGAL	14	▲2	1.62
JAPAN	15	▼5	1.46
AUSTRIA	16	NEW!	1.37
MONACO	17	NEW!	1.27
SOUTH AFRICA	18	↔	1.18
DENMARK	19	▼6	1.12
HONG KONG	20	▼6	1.06

TOP 20 INTERNATIONAL COUNTRY DESTINATIONS

Our clients traveled to a total of 5,213 international destinations in 2016, 1,350 more than 2015, representing a 35% increase.



THE TOP 20

- 1 U.K.
- 2 ITALY
- 3 FRANCE
- 4 CANADA
- 5 SPAIN
- 6 AUSTRALIA
- 7 GERMANY
- 8 SWITZERLAND
- 9 IRELAND
- 10 SINGAPORE
- 11 NEW ZEALAND
- 12 NETHERLANDS
- 13 GREECE
- 14 PORTUGAL
- 15 JAPAN
- 16 AUSTRIA
- 17 MONACO
- 18 SOUTH AFRICA
- 19 DENMARK
- 20 HONG KONG

Milestone
LONDON

Savoy
LONDON

The Ritz
LONDON

Baglioni Hotel
Regina ROME

The Tribune Hotel
ROME

Hotel Campo
ROME

Hotel Ritz
PARIS

Four Seasons Hotel
George V PARIS

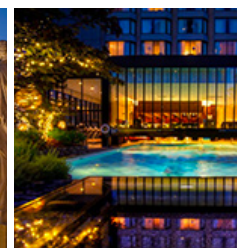
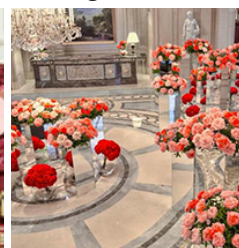
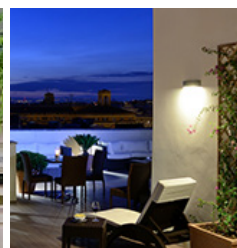
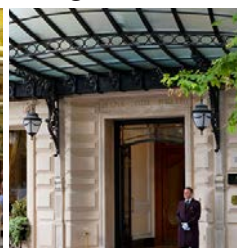
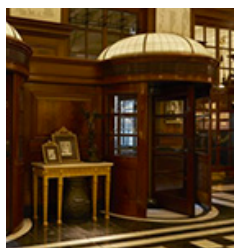
Hôtel de Sèze
PARIS

Hotel Majestic
Barrière CANNES

Grand Hotel Bordeaux
BORDEAUX

Four Seasons
VANCOUVER

Fairmont Hotel
VANCOUVER

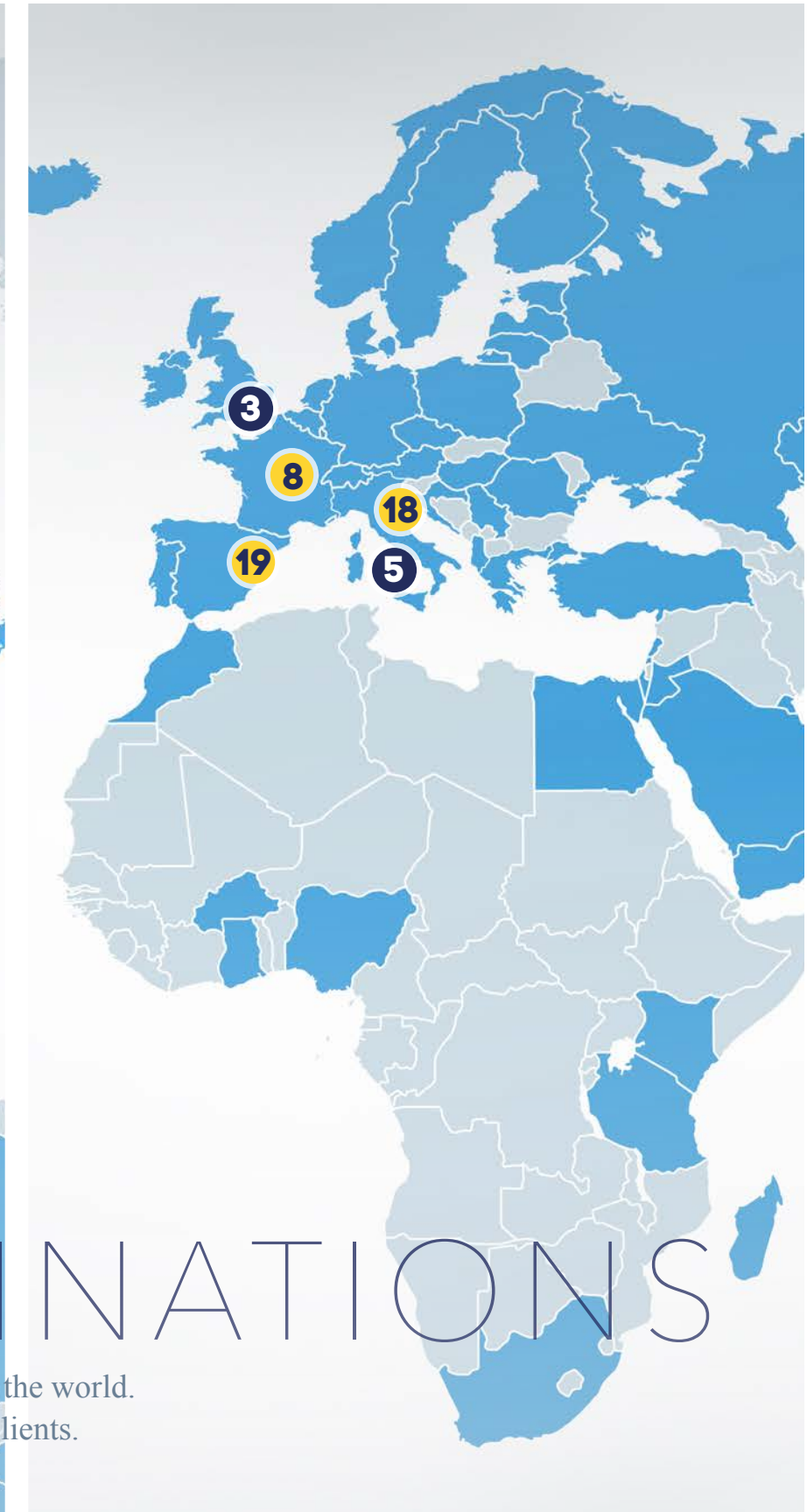


DESTINATION	RANK	CHANGE IN RANK 2015-16	NO. TRIPS
NEW YORK	1	↔	784
MIAMI	2	↔	486
LONDON	3	▲1	219
LOS ANGELES	4	▼1	180
ROME	5	▲9	122
SAN FRANCISCO	6	▲1	102
TETON VILLAGE	7	▼1	98
PARIS	8	▲3	97
PARK CITY	9	NEW!	95
CHICAGO	10	▲2	79
WASHINGTON	11	▼3	76
ASPEN	12	▲1	76
HOUSTON	13	▲2	68
SINGAPORE	14	▼9	66
VAIL	15	NEW!	64
VANCOUVER	16	NEW!	61
LAS VEGAS	17	▼8	59
TESSERA (VE)	18	NEW!	59
BARCELONA	19	▼10	58
BROOKLYN	20	NEW!	57

THE TOP TWENTY

CITY DESTINATIONS

Luggage Free clients' destinations represent many of the most frequently visited international cities.



- THE TOP 20**
- 1 NEW YORK
 - 2 MIAMI
 - 3 LONDON
 - 4 LOS ANGELES
 - 5 ROME
 - 6 SAN FRANCISCO
 - 7 TETON VILLAGE
 - 8 PARIS
 - 9 PARK CITY
 - 10 CHICAGO
 - 11 WASHINGTON D.C.
 - 12 ASPEN
 - 13 HOUSTON
 - 14 SINGAPORE
 - 15 VAIL
 - 16 VANCOUVER
 - 17 LAS VEGAS
 - 18 TESSERA (VE)
 - 19 BARCELONA
 - 20 BROOKLYN

THE TOP TWENTY CITY DESTINATIONS

Luggage Free has the capability to ship almost anywhere in the world.
These destinations represent those most frequented by our clients.

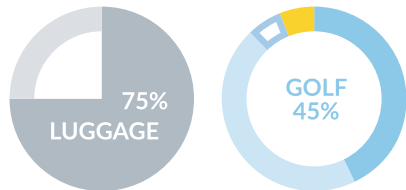
TOP FIVE CITIES

IN TOP FIVE INTERNATIONAL DESTINATIONS



UNITED KINGDOM

- 1 London
- 2 Southampton
- 3 Fife
- 4 Edinburgh
- 5 North Berwick



Luggage comprises 75% of UK travel

ACTIVITIES IN UK

Cruise 43%

Golf 45%

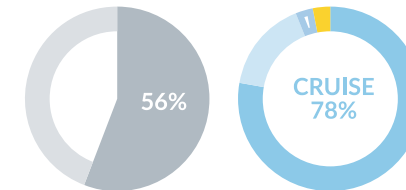
Ski 6%

Bike 6%



ITALY

- 1 Rome
- 2 Tesser (VE)
- 3 Florence
- 4 Venice
- 5 Milan



Italy 56% Luggage

ACTIVITIES IN ITALY

Cruise 78%

Golf 16%

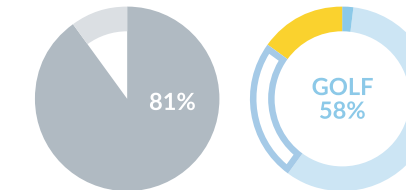
Ski 3%

Bike 3%



FRANCE

- 1 Paris
- 2 Cannes
- 3 Bordeaux
- 4 Saint Tropez
- 5 Neuilly sur Seine



France 81% Luggage

ACTIVITIES IN FRANCE

Cruise 2%

Golf 58%

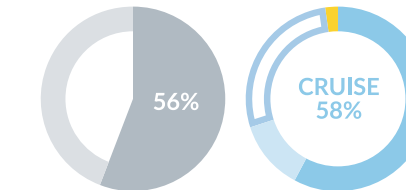
Ski 25%

Bike 15%



CANADA

- 1 Vancouver
- 2 Toronto
- 3 Montreal
- 4 Whistler
- 5 Wallace



Canada 56% Luggage

ACTIVITIES IN CANADA

Cruise 58%

Golf 12%

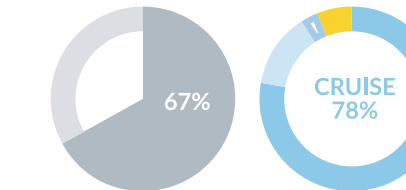
Ski 28%

Bike 2%



SPAIN

- 1 Barcelona
- 2 Madrid
- 3 Casares - Málaga
- 4 Caldes de Malavella
- 5 Seville



Spain 67% Luggage

ACTIVITIES IN SPAIN

Cruise 78%

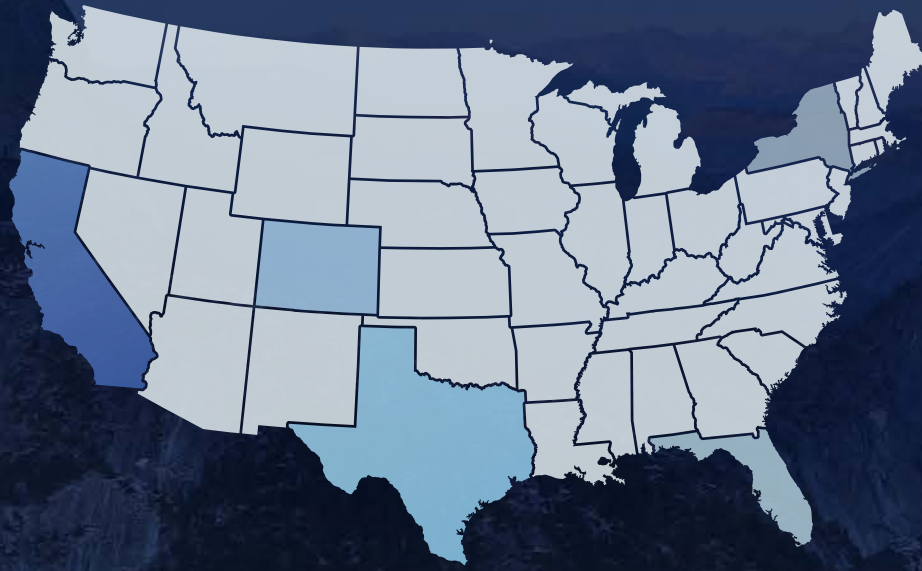
Golf 13%

Ski 3%

Bike 6%

DOMESTIC

TOP FIVE DESTINATION STATES



CA

NY

FL

CO

TX

TOP FIVE CITIES

IN TOP FIVE U.S. STATE DESTINATIONS



CALIFORNIA

- 1 Los Angeles
- 2 San Francisco
- 3 San Diego
- 4 Beverly Hills
- 5 Santa Monica



NEW YORK

- 1 New York
- 2 Brooklyn
- 3 Woodside
- 4 Scarsdale
- 5 Southampton



FLORIDA

- 1 Miami
- 2 Palm Beach
- 3 Fort Lauderdale
- 4 Boca Raton
- 5 Orlando



COLORADO

- 1 Aspen
- 2 Vail
- 3 Denver
- 4 Avon
- 5 Snowmass Village



TEXAS

- 1 Houston
- 2 Dallas
- 3 Austin
- 4 Plano
- 5 San Antonio

Peninsula
BEVERLY HILLS



St. Regis
NEW YORK CITY



The Crosby Hotel
NEW YORK CITY



The Breakers
PALM BEACH



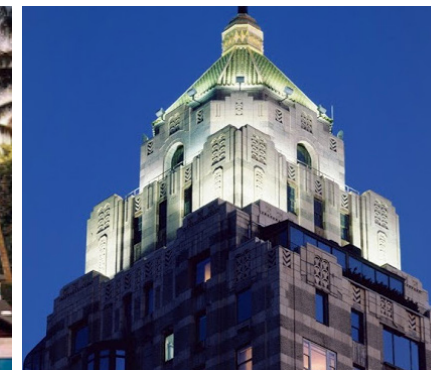
Faena Hotel
MIAMI



The Setai
MIAMI BEACH



The Carlyle
NEW YORK



OUR CLIENTS' FAVORITE **DOMESTIC HOTELS**



ORIGINS

IN 2016 WE SHIPPED LUGGAGE FROM:

50
STATES

97
COUNTRIES

2435
CITIES

THE TOP TEN

COUNTRIES OF ORIGIN



Luggage Free clients originate their travel from cities around the world, however the majority begin their travels in North America. Western Europe is the second largest jump off region.

TOP FIVE CITIES

IN TOP FIVE INTERNATIONAL ORIGINS



UNITED KINGDOM

- 1 London
- 2 Southampton
- 3 Edinburgh
- 4 Saint Andrews
- 5 Fife



ITALY

- 1 Rome
- 2 Venice
- 3 Florence
- 4 Capri
- 5 Porto Cervo



FRANCE

- 1 Paris
- 2 Biarritz
- 3 Angers
- 4 Cannes
- 5 Chamonix



CANADA

- 1 Vancouver
- 2 Toronto
- 3 Montreal
- 4 Whistler
- 5 Calgary



SPAIN

- 1 Barcelona
- 2 Madrid
- 3 Girona
- 4 Malaga
- 5 Hondarribia

DOMESTIC

TOP FIVE STATES OF ORIGIN



NY

CA

FL

TX

CO

TOP FIVE CITIES

IN TOP FIVE U.S. STATE ORIGINS



NEW YORK

- 1 New York
- 2 Brooklyn
- 3 Scarsdale
- 4 Rye
- 5 Southampton



CALIFORNIA

- 1 Los Angeles
- 2 San Francisco
- 3 San Diego
- 4 Beverly Hills
- 5 Santa Monica



FLORIDA

- 1 Miami
- 2 Palm Beach
- 3 Fort Lauderdale
- 4 Naples
- 5 Sarasota



TEXAS

- 1 Houston
- 2 Dallas
- 3 Austin
- 4 Plano
- 5 San Antonio

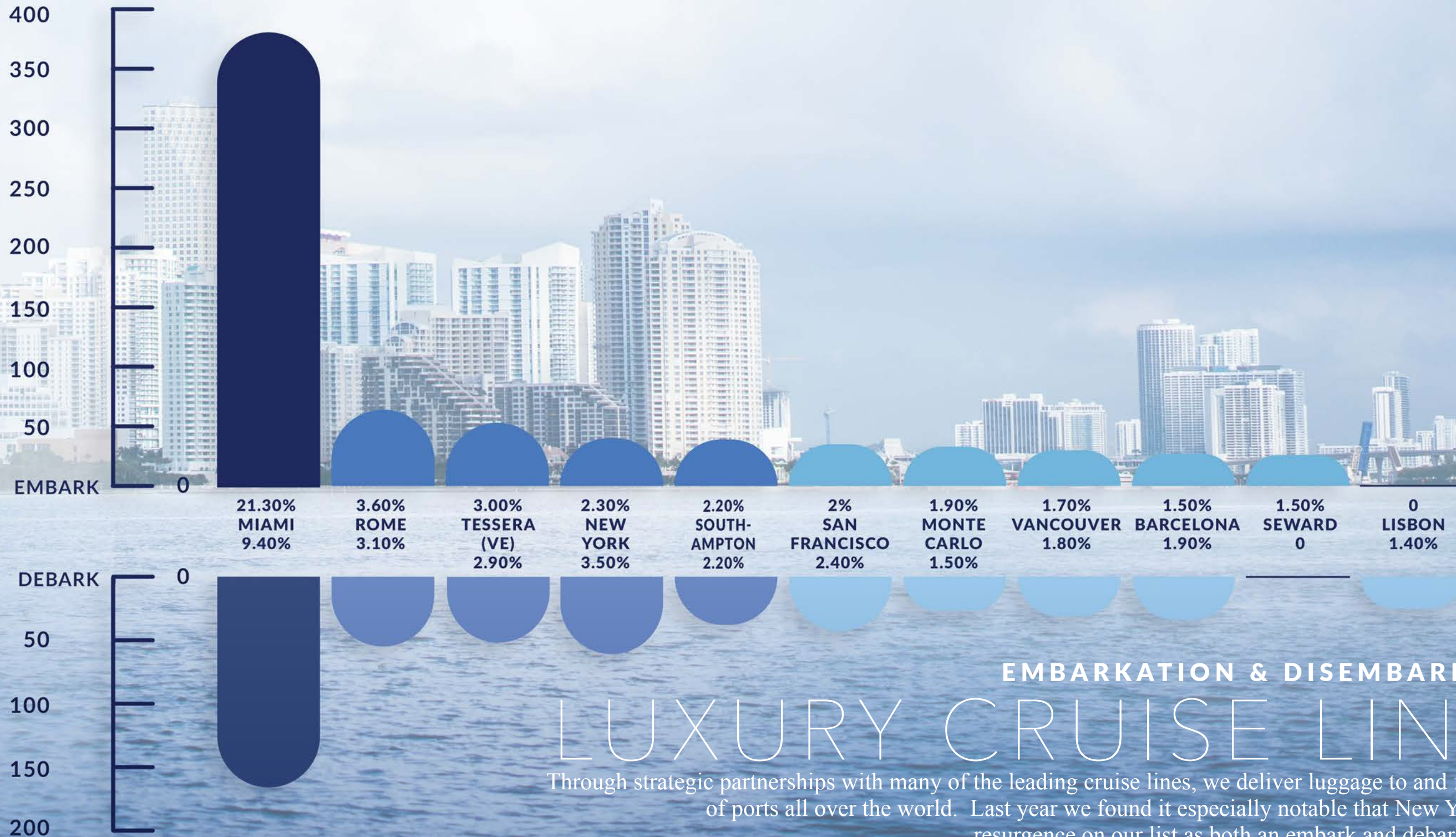


COLORADO

- 1 Aspen
- 2 Vail
- 3 Denver
- 4 Snowmass Village
- 5 Avon



ACTIVITY DESTINATIONS



EMBARKATION & DISEMBARKATION

LUXURY CRUISE LINES

Through strategic partnerships with many of the leading cruise lines, we deliver luggage to and from scores of ports all over the world. Last year we found it especially notable that New York made a resurgence on our list as both an embark and debarkation port.

TOP TEN DESTINATION
GOLF



It's no secret golf bags are cumbersome, which is why sending golf bags ahead is so popular with our clients. When it comes to destinations, the scattered distribution of golf bag shipments is extremely unique.

OUR CLIENTS' FAVORITE **GOLF COURSES**

North Berwick Golf Club
NORTH BERWICK, SCOTLAND

Old Course (St. Andrews)
ST. ANDREWS, SCOTLAND

Kingsbarns Golf Links
ST. ANDREWS, SCOTLAND

PGA Catalunya Resort
GIRONA, SPAIN

Elmgreen Golf Club
DUBLIN, IRELAND

Kauri Cliffs Golf Course
MATAURI BAY, NEW ZEALAND





TOP TWENTY DESTINATIONS

SKIING

The top twenty places we send our clients to ski.

Where do our clients ski? Just about anywhere it seems and they are doing it more often as evidenced by the 58% increase in the number of skis we sent last year (year over year).

OUR CLIENTS' FAVORITE **SKI RESORTS**

Hotel Jerome
ASPEN



The Little Nell
ASPEN



Montage
DEER VALLEY



Four Seasons
JACKSON HOLE



Stein Eriksen
PARK CITY



ORIGINATION & DESTINATION CYCLING

TOP ORIGINS

TOP DESTINATIONS



BICYCLES LEFT FROM NEW YORK



BICYCLES ARRIVED IN NY

PORTO

SANTA MONICA

WASHINGTON
D.C.

SAINT LARY
SOULAN

BROOKLYN

ALBERTVILLE

DUBLIN

AUSTIN

LONDON

BARCELONA

PARIS

BERLIN

TETON
VILLAGE

AMSTERDAM

FALLS
CHURCH

HOUSTON

DEL
MAR

ZURICH

Nothing beats riding your own bike when you travel, but not much is worse than getting it there, which is why bike shipping is so popular with our clients.



2 0 1 6 T R E N D S

2016 DESTINATION SEASONAL TRENDS

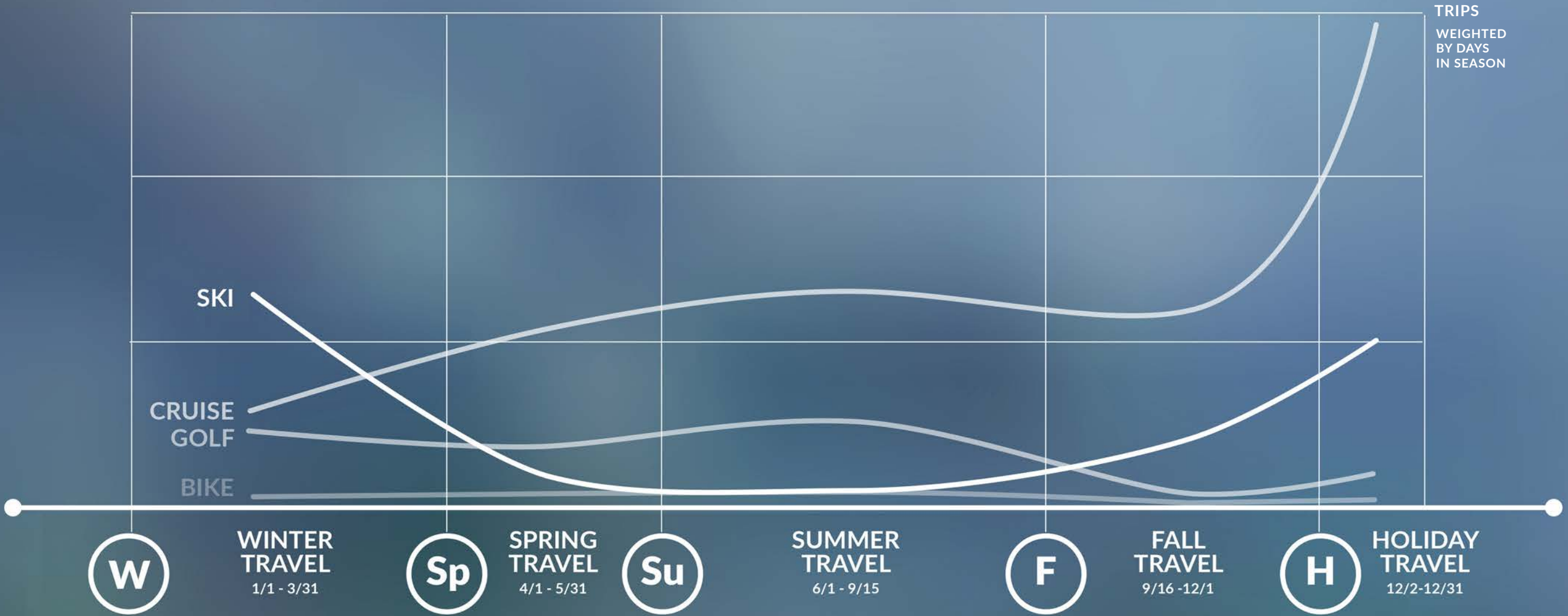
A quick glance shows
a significant spike in
international travel during
the summer, along with
a noteworthy increase in
domestic shipments during
the Holiday season.



2016 ACTIVITY

SEASONAL TRENDS

Luggage Free clients stay active, consistently golfing and cycling year round. Skiing is obviously seasonal, with shipments spiking in the Winter and Holiday seasons. However most interesting is the volume of clients setting off on luxury cruises during the Holidays.





LuggageFree

TELL US WHAT YOU THINK

Jeff@luggagefree.com