A LOOK AHEAD: HOW YOUNGER GENERATIONS ARE SHAPING THE FUTURE OF TRAVEL

Custom Research
GETTING TO KNOW GEN Z

Up to $143 billion in buying power

Largest generation by 2020

Entering the workforce or early in their professional career

Constantly connected – more than half use their smartphone 5+ hours per day

Social media is an important communication platform – more than 50% use Twitter, Snapchat, Facebook, Instagram, YouTube
# METHODOLOGY

## Generation Z

<table>
<thead>
<tr>
<th>Generational Ages</th>
<th>N = 2,491</th>
<th>N = 120</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Generation Z</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Millennials</strong></td>
<td>N = 2,918</td>
<td>N = 1,289</td>
</tr>
<tr>
<td><strong>Countries</strong></td>
<td>AR, AU, BR, CA, CN, DE, FR, JP, MX, UK, US</td>
<td>CN, IN, DE, UK, US</td>
</tr>
</tbody>
</table>

**Generational Ages**

- Generation Z = 18-23
- Millennials = 24-35
LEISURE TRAVEL
GEN Z ALREADY TAKING ALMOST AS MANY TRIPS AS MILLENNIALS
GEN Z TRAVELS RIGHT – TAKING EXTENDED VACATIONS
TWO-THIRDS ARE DESTINATION INDECISIVE

66% Z

67% M
YOUNGER GENERATIONS OPEN TO DESTINATION INSPIRATION

77%  

Z

74%  

M

Multi-National Travel Trends Q24 First planning trip
MORE LIKELY TO TRAVEL DOMESTICALLY

41% International
59% Domestic
### Multi-National Travel Trends

**Q10** Types of vacation in the past year

<table>
<thead>
<tr>
<th>Type of Vacation</th>
<th>Z (Young)</th>
<th>M (Old)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>RELAXING</strong> (Beach, resort, cruise, all-inclusive)</td>
<td>54%</td>
<td>57%</td>
</tr>
<tr>
<td><strong>SIGHTSEEING</strong> (Museums, landmarks, etc.)</td>
<td>44%</td>
<td>45%</td>
</tr>
<tr>
<td><strong>VISITING FAMILY</strong></td>
<td>42%</td>
<td>39%</td>
</tr>
</tbody>
</table>
HAVE BUDGET, WILL TRAVEL

82% Yes
18% No

Multi-National Travel Trends: Q18 Was Budget a Consideration?
## TRAVEL SPENDING ALLOCATION

<table>
<thead>
<tr>
<th>Category</th>
<th>Z (%)</th>
<th>M (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>HOTEL</td>
<td>22.5</td>
<td>25.6</td>
</tr>
<tr>
<td>FLIGHT</td>
<td>20.2</td>
<td>19.8</td>
</tr>
<tr>
<td>FOOD</td>
<td>16.4</td>
<td>16.2</td>
</tr>
<tr>
<td>TRANSPORTATION</td>
<td>11.4</td>
<td>10.3</td>
</tr>
<tr>
<td>SHOPPING</td>
<td>11.1</td>
<td>10.5</td>
</tr>
<tr>
<td>ATTRACTIONS</td>
<td>11.0</td>
<td>10.6</td>
</tr>
</tbody>
</table>
TRAVEL DEALS & VALUE ARE IMPORTANT

- Best deals + value: 54% (Z generation), 49% (M generation)
- Exploring outdoors: 34% (Z generation), 32% (M generation)
- #YOLO: 33% (Z generation), 31% (M generation)
ACTIVITIES & EXPERIENCES GET TO THE HEART OF TRAVEL DECISIONS

Activities I will be doing on my trip

A once in a lifetime experience

The cultural experience

Lowest Price

Multi-National Travel Trends
Max Difference Index
### FINDING THE FUN

<table>
<thead>
<tr>
<th></th>
<th>Z (%)</th>
<th>M (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>SPECIAL EVENTS</td>
<td>26</td>
<td>25</td>
</tr>
<tr>
<td>ACTIVITY BASED VACAY</td>
<td>20</td>
<td>20</td>
</tr>
<tr>
<td>PARTY</td>
<td>21</td>
<td>18</td>
</tr>
</tbody>
</table>

- **CONCERTS, FESTIVALS, SPORTING EVENTS**
- **GOLF, SKIING, HIKING**
- **BACHELOR, GIRLS' TRIP**

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**Multi-National Travel Trends**

Q10 Types of vacation in the past year
INFLUENCE OF SOCIAL MEDIA

84%

77%

Z

M

I see a deal or promotion

Travel pictures by friends or experts

Travel videos posted by friends or experts

Multi-National Travel Trends
Q28 Social Media Influence
Q29 How Social Media Influences
ADS CAN BE INFLUENTIAL
### Appealing Deals & Imagery Most Influential

<table>
<thead>
<tr>
<th></th>
<th>Z (%)</th>
<th>M (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appealing deals</td>
<td>56</td>
<td>56</td>
</tr>
<tr>
<td>Appealing imagery</td>
<td>53</td>
<td>52</td>
</tr>
<tr>
<td>Informative content</td>
<td>45</td>
<td>46</td>
</tr>
<tr>
<td>Helpful reviews</td>
<td>28</td>
<td>27</td>
</tr>
</tbody>
</table>

Multi-National Travel Trends Q33 Ad Influence
SMARTPHONE USAGE HIGH, ESPECIALLY IN INSPIRATION PHASE

<table>
<thead>
<tr>
<th>Stage</th>
<th>Z Usage</th>
<th>M Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inspiration</td>
<td>68%</td>
<td>46%</td>
</tr>
<tr>
<td>Research</td>
<td>61%</td>
<td>45%</td>
</tr>
<tr>
<td>Booking</td>
<td>32%</td>
<td>33%</td>
</tr>
<tr>
<td>In-Trip</td>
<td>79%</td>
<td>75%</td>
</tr>
</tbody>
</table>
BUSINESS + LEISURE
= BLEISURE TRAVEL
WATCH OUT WORLD – GEN Z ARE BEGINNING TO TRAVEL FOR WORK

Bleisure Traveler Trends
S2: Business Trips – How many business trips did you take during the past 12 months?
WHEN GIVEN THE CHANCE, GEN Z ARE BIG ON BLEISURE

<table>
<thead>
<tr>
<th></th>
<th>Z (%)</th>
<th>M (%)</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>66</td>
<td>61</td>
</tr>
</tbody>
</table>
LENGTH OF TRIP CAN NEARLY DOUBLE BY ADDING LEISURE

Expedia Group Media Solutions – Bleisure Traveler Trends
C2: How many of those days were for business, how many of those days were for leisure?
SAVING FOR BLEISURE STARTS EARLY

Bleisure Traveler Trends
A21: Which of the following statements best describes you?

13% 13%
1-2 months before a bleisure trip

31% 36%
Before the trip is scheduled

40% 27%
As soon as the bleisure trip is scheduled

expedia group media solutions
Bleisure Traveler Trends
B1: Before/while considering turning a business trip into a bleisure trip, how much time do you typically spend on research to help you make your decision?

- Almost None
- 1-2 hours
- 3-5 hours
- 6-10 hours
- 10+ hours
FACTORS FOR DECIDING TO BLEISURE

- Great entertainment city: 41%
- Iconic destination: 40%
- Travel with friends/family: 39%

A11: What are the biggest factors that influence your decision to turn a business trip into a bleisure trip?
GEN Z ARE SPLIT ON STAYING PUT OR EXPLORING FOR BLEISURE

55% Same Place

45% Different Place

Bleisure Traveler Trends
A6: What % of all your past bleisure trips have you stayed in the same city vs. staying in a different city for both?
GEN Z DRAWN TO EXPERIENCES – ESPECIALLY BY THE BEACH

- Weather: 56% (Z), 53% (M)
- Food & Restaurants: 57% (Z), 60% (M)
- Beaches: 65% (Z), 54% (M)
KEY TAKEAWAYS FOR REACHING YOUNGER TRAVELERS

**Activities & Experiences Above All Else**
Younger travelers prioritize activities and experiences ahead of price, but budget is still a consideration.

**Destination Indecisive**
Approximately two-thirds of younger travelers are undecided on a destination when they decide to take a trip, illustrating an opportunity to influence through relevant content and advertising.

**Open to Inspiration & Advertising**
More than 70% of younger travelers are open to help and inspiration when planning a trip. Social media and advertising can influence their decisions, especially appealing deals, photos and videos.

**Trip Types Vary**
Gen Z and millennials are interested in popular trip types – like relaxing vacations and visiting family – but wherever they go they crave activities, events and adventures.

**Soon-to-Be Bleisure Travelers**
Gen Z are starting to take business trips, following millennial counterparts. Younger generations are saving for bleisure travel and capitalizing on opportunities to extend business trips for leisure.
THANK YOU