AMERICAN MULTI-GENERATIONAL TRAVEL TRENDS

Travel Habits and Behaviors of Generation Z, Millennials, Generation X, and Baby Boomers
METHODOLOGY
ONLINE SURVEY

Data Collection Method
Quantitative Survey

Field Work
30 March – 7 April 2017

Sample Size | Total: n=1001
US Travelers
Generation Z (n=211)
Millennials (n=263)
Generation X (n=269)
Boomers (n=258)

Qualifying Criteria
Must have booked online travel in the past year

Generational Ages
Generation Z = 18-23
Millennials = 24-35
Generation X = 36-55
Boomers = 55+
HOW THEY TRAVEL
MILLENNIALS TAKE THE MOST TRIPS

While Boomers are not traveling as frequently as other generations, they make up for it in trip length.

<table>
<thead>
<tr>
<th>Total Number of Trips Taken Per Year</th>
<th>Last Vacation Duration in Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gen Z</td>
<td>Millennials</td>
</tr>
<tr>
<td>4.4</td>
<td>6.6</td>
</tr>
<tr>
<td>5.6</td>
<td>6.2</td>
</tr>
<tr>
<td>4.0</td>
<td>6.4</td>
</tr>
<tr>
<td>3.5</td>
<td>7.8</td>
</tr>
</tbody>
</table>

Q9: Typically, how many personal/leisure and business trips do you take per year?
Q15: How long was your vacation?
MOST PREFER TO EXPLORE THE VAST COUNTRY
Gen Z slightly most likely to travel outside the US

Q14. Was the trip...?

- **Gen Z:**
  - 23% travel outside the US
  - 77% stay in their country

- **Millennials:**
  - 19% travel outside the US
  - 81% stay in their country

- **Gen X:**
  - 12% travel outside the US
  - 88% stay in their country

- **Boomers:**
  - 19% travel outside the US
  - 81% stay in their country

In My Country:
- **Gen Z:** 77%
- **Millennials:** 81%
- **Gen X:** 88%
- **Boomers:** 81%
Q10: What types of vacations have you taken in the past year?

**VISITING FAMILY AND RELAXING VACATIONS ARE MOST POPULAR**

Boomers and Gen Z visit family, while Millennials and Gen X travel to relax and see the sights.

- **Visiting Family**:
  - Gen Z: 56%
  - Millennials: 51%
  - Gen X: 45%
  - Boomers: 31%
- **Relaxing**:
  - Gen Z: 67%
  - Millennials: 55%
  - Gen X: 48%
  - Boomers: 45%
- **Sight-seeing**:
  - Gen Z: 45%
  - Millennials: 42%
  - Gen X: 48%
  - Boomers: 44%
- **Family Play**:
  - Gen Z: 31%
  - Millennials: 45%
  - Gen X: 41%
  - Boomers: 27%
- **Romantic Getaway**:
  - Gen Z: 23%
  - Millennials: 34%
  - Gen X: 21%
  - Boomers: 19%

*Notable Generational Difference*
TRANSPORTATION IS CONSISTENT ACROSS GENERATIONS

All generations show little variation in their preferred method of travel

Q16. How did you get to your destination?

<table>
<thead>
<tr>
<th>Method</th>
<th>Gen Z</th>
<th>Millennials</th>
<th>Gen X</th>
<th>Boomers</th>
<th>Average Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plane</td>
<td>64%</td>
<td>61%</td>
<td>54%</td>
<td>51%</td>
<td>58%</td>
</tr>
<tr>
<td>Car Ride</td>
<td>30%</td>
<td>35%</td>
<td>43%</td>
<td>38%</td>
<td>37%</td>
</tr>
<tr>
<td>Train</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>2%</td>
<td>1%</td>
</tr>
</tbody>
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<td>1%</td>
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<td>2%</td>
<td>1%</td>
</tr>
</tbody>
</table>
ALL GENERATIONS PREFER HOTEL STAYS

Gen Z more likely than other generations to consider alternative accommodations

Q17. Where did you stay on your last trip?

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>Gen Z</th>
<th>Millennials</th>
<th>Gen X</th>
<th>Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel</td>
<td>69%</td>
<td>68%</td>
<td>58%</td>
<td>58%</td>
</tr>
<tr>
<td>With Family / Friends</td>
<td>18%</td>
<td>8%</td>
<td>7%</td>
<td>18%</td>
</tr>
<tr>
<td>Resort</td>
<td>11%</td>
<td>16%</td>
<td>17%</td>
<td>11%</td>
</tr>
<tr>
<td>Alternative Accommodations</td>
<td>8%</td>
<td>3%</td>
<td>4%</td>
<td>3%</td>
</tr>
</tbody>
</table>
All generations spend almost half on hotel and flight.

Budget a Primary Factor?

<table>
<thead>
<tr>
<th>Generation</th>
<th>Yes (%)</th>
<th>No (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gen Z</td>
<td>81%</td>
<td>19%</td>
</tr>
<tr>
<td>Millennials</td>
<td>74%</td>
<td>26%</td>
</tr>
<tr>
<td>Gen X</td>
<td>62%</td>
<td>38%</td>
</tr>
<tr>
<td>Boomers</td>
<td>57%</td>
<td>43%</td>
</tr>
</tbody>
</table>

Proportion Spent On

<table>
<thead>
<tr>
<th>Category</th>
<th>Gen Z</th>
<th>Millennials</th>
<th>Gen X</th>
<th>Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel</td>
<td>27%</td>
<td>20%</td>
<td>30%</td>
<td>29%</td>
</tr>
<tr>
<td>Flight</td>
<td>25%</td>
<td>23%</td>
<td>17%</td>
<td>19%</td>
</tr>
<tr>
<td>Food</td>
<td>16%</td>
<td>16%</td>
<td>17%</td>
<td>19%</td>
</tr>
<tr>
<td>Transportation</td>
<td>11%</td>
<td>11%</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>Attractions</td>
<td>8%</td>
<td>8%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Shopping</td>
<td>6%</td>
<td>6%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Home sharing</td>
<td>5%</td>
<td>3%</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
<td>3%</td>
<td>2%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Q18. Was budget a primary factor when you were researching/booking your last trip?
Q20. What proportion of your travel budget did you spend on each of the following?
Q7: When was the last time you booked travel on a travel website for a personal vacation/holiday?

- **Less than 3 months ago**
  - Gen Z: 49%
  - Millennials: 52%
  - Gen X: 25%
  - Boomers: 33%

- **3-5 months ago**
  - Gen Z: 25%
  - Millennials: 21%
  - Gen X: 27%
  - Boomers: 19%

- **6 months ago**
  - Gen Z: 15%
  - Millennials: 17%
  - Gen X: 27%
  - Boomers: 21%

- **A year ago**
  - Gen Z: 11%
  - Millennials: 11%
  - Gen X: 27%
  - Boomers: 28%

Boomers are most likely to have booked travel a year ago.
TRAVELER ATTITUDES AND INFLUENCES
YOUNGER GENERATIONS ARE MORE DESTINATION INDECISIVE

Don’t have a destination in mind

Deciding between 2 or more destinations

Have already decided on a destination

Q23. Which of the following options best describes the way you feel when you first decide to take a trip? (Please select one)
Q35. Please indicate all of the resources you used when you planned your last trip? (Please select all that apply)
OTAS CONVERT THE MOST TRAVELERS, ACROSS GENERATIONS

Q38: Please indicate which resources you used to book travel online on your last trip

<table>
<thead>
<tr>
<th>Resource</th>
<th>Gen Z</th>
<th>Millennials</th>
<th>Gen X</th>
<th>Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online Travel Agency</td>
<td>67%</td>
<td>59%</td>
<td>57%</td>
<td>46%</td>
</tr>
<tr>
<td>Hotel Sites</td>
<td>36%</td>
<td>33%</td>
<td>36%</td>
<td>36%</td>
</tr>
<tr>
<td>Airline Sites</td>
<td>34%</td>
<td>32%</td>
<td>34%</td>
<td>32%</td>
</tr>
<tr>
<td>Car Rental Sites</td>
<td>15%</td>
<td>18%</td>
<td>20%</td>
<td>18%</td>
</tr>
<tr>
<td>Destination Sites</td>
<td>17%</td>
<td>14%</td>
<td>16%</td>
<td>17%</td>
</tr>
<tr>
<td>Alternative Accommodation Sites</td>
<td>16%</td>
<td>9%</td>
<td>9%</td>
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</tr>
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<td>16%</td>
<td>9%</td>
<td>9%</td>
<td>19%</td>
</tr>
</tbody>
</table>
VALUE AND EXPLORATION DRIVE TRAVELER SENTIMENT

‘You only live once’ opportunities also rank high in consideration

### Percent of Travellers Who Somewhat Agree/Strongly Agree With The Statement

<table>
<thead>
<tr>
<th>Statement</th>
<th>Gen Z</th>
<th>Millennials</th>
<th>Gen X</th>
<th>Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>I look for the best deals and most value for my dollar</td>
<td>93%</td>
<td>92%</td>
<td>93%</td>
<td>95%</td>
</tr>
<tr>
<td>I’ll go anywhere that allows me to explore the outdoors and be active</td>
<td>83%</td>
<td>89%</td>
<td>78%</td>
<td>72%</td>
</tr>
<tr>
<td>You only live once, so taking risks and crossing things off my ‘bucket list’ is imperative</td>
<td>81%</td>
<td>83%</td>
<td>70%</td>
<td>60%</td>
</tr>
<tr>
<td>I often opt for &quot;off the beaten path&quot; locations and/or recommendations from locals</td>
<td>78%</td>
<td>78%</td>
<td>71%</td>
<td>67%</td>
</tr>
<tr>
<td>I prefer to go to museums, historical sites and arts &amp; culture fill up my travel itinerary</td>
<td>71%</td>
<td>73%</td>
<td>70%</td>
<td>67%</td>
</tr>
<tr>
<td>Every vacation is family oriented and has a specific focus on what will keep my family entertained and happy</td>
<td>72%</td>
<td>73%</td>
<td>71%</td>
<td>63%</td>
</tr>
<tr>
<td>I prefer all-inclusive vacations like resorts and cruises where I don’t have to worry about a thing</td>
<td>69%</td>
<td>83%</td>
<td>65%</td>
<td>52%</td>
</tr>
<tr>
<td>I’m all about taking a nap on the beach, I plan all my travel around where and what I eat and drink</td>
<td>70%</td>
<td>75%</td>
<td>64%</td>
<td>53%</td>
</tr>
<tr>
<td>I don’t like travelling far, as long as I’m not at work, I’m on vacation</td>
<td>58%</td>
<td>66%</td>
<td>39%</td>
<td>29%</td>
</tr>
<tr>
<td></td>
<td>32%</td>
<td>40%</td>
<td>24%</td>
<td>21%</td>
</tr>
</tbody>
</table>

Q8 Please select to what extent you agree with the following statements. (Please select strongly disagree, somewhat disagree, somewhat agree or strongly agree for each statement)
For this exercise, you will go through a small number of different screens where we will ask you to identify which consideration would be most important to you in terms of how you choose a vacation/holiday and which consideration would be least important to you in terms of how you choose to purchase a vacation/holiday.

WHEN PRIORITIZING, ACTIVITIES AND UNIQUE EXPERIENCES DRIVE TRAVEL DECISIONS

Activities I will be doing on my trip
A once in a lifetime experience
The cultural experience
Lowest Price
Deals and/or special offers
My food experience

Gen Z
Millennials
Gen X
 Boomers
Which of the following social media sites influence or inspire your decision making process in booking a trip? (Please select all that apply)

- Facebook
- Instagram
- Twitter
- Pinterest
- Snapchat
- Other
- Not Influenced by Social Media

Facebooks influential in travel decisions for younger generations. Boomers claim social media has little influence on travel booking decisions.
DEALS AND REVIEWS CAN HELP TRAVELERS CONVERT

Destination content closely follows in influencing travelers

I look for deals before making a decision
- Gen Z: 90%
- Millennials: 91%
- Gen X: 92%
- Boomers: 90%

Informative content from destinations and/or travel brands can influence my decision making process
- Gen Z: 86%
- Millennials: 88%
- Gen X: 87%
- Boomers: 84%

I read reviews of places I want to visit from sites like TripAdvisor before making my final decision
- Gen Z: 82%
- Millennials: 89%
- Gen X: 89%
- Boomers: 81%

I talk to people who have visited the place before making a decision
- Gen Z: 76%
- Millennials: 89%
- Gen X: 74%
- Boomers: 67%

Ads can be influential in my decision making process
- Gen Z: 65%
- Millennials: 72%
- Gen X: 65%
- Boomers: 66%

I use loyalty programs in my decision making process
- Gen Z: 58%
- Millennials: 66%
- Gen X: 48%
- Boomers: 50%

Q32. Please select to what extent you agree with the following statements. (Please select one for each statement)
The deals advertised look appealing
The content in the ad is informative
The imagery in the ad looks appealing
The ad includes helpful reviews
None of the above

Q33. How can ads help influence in your decision making process? (Select all that apply)
ALL GENERATIONS USE SMARTPHONES IN TRIP

Gen Z and Millennials more likely than older generations to use smartphone during inspiration phase

Q47. For each of the following statements, which device(s) do you use? Please select all that apply.

<table>
<thead>
<tr>
<th>When I'm looking for inspiration on where to travel</th>
<th>When I’m researching on where to travel</th>
<th>When I'm booking the travel</th>
<th>During my trip</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gen Z 67% Millenials 62% Gen X 33% Gen Z 11%</td>
<td>Gen X 44% Millenials 41% Gen Z 25% Gen X 7%</td>
<td>Gen X 27% Millenials 30% Gen Z 13% Gen X 8%</td>
<td>Gen Z 78% Millenials 71% Gen X 72% Gen Z 70%</td>
</tr>
</tbody>
</table>

When I'm looking for inspiration on where to travel
When I’m researching on where to travel
When I'm booking the travel
During my trip
Boomers most reliant on desktop throughout all phases, except in-trip

Q47. For each of the following statements, which device(s) do you use? Please select all that apply.

- When I'm looking for inspiration on where to travel
- When I'm researching on where to travel
- When I'm booking the travel
- During my trip

- Gen Z
- Millennials
- Gen X
- Boomers

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<tr>
<td>During my trip</td>
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<td>32%</td>
<td>29%</td>
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KEY INSIGHTS FOR AMERICAN GENERATIONS

**Gen Z**
Are looking to opt for off the beaten path destinations, are open-minded, looking for recommendations from locals, and embrace the you only live once mentality (#YOLO)

Travel nearly 30 days a year and although they have a budget in mind when planning a trip, they invest in travel, and are more likely than other generations to travel internationally

**Gen X**
Travel fewest days per year, but when they do, they spend more on hotels, prefer relaxing trips, sightseeing vacations, and visiting family

About 90 percent of Gen X said they look for deals and read travel reviews before making a decision, and 88 percent said informative content from destinations and travel brands can influence their decision

**Millennials**
More than any other generation, said ads can be influential during the decision-making process, and they are the most influenced by ads featuring appealing deals or imagery and informative content

More than half of Millennials are using OTAs to book travel, followed by search engines

**Boomers**
Travel on average 27 days per year and are heavily focused on visiting family, so they know where they want to go and how to get there

Boomers are less likely to be tied to a budget than other generations, and when not visiting family, they fill their itinerary with museums, historical sites, arts and culture, and recommendations from locals
KEY TAKEAWAYS

- **Gen Z is Open-Minded, Bucket-List Oriented and Looking for Off the Beaten Path Locations**
- **Millennials Embrace YOLO and Prefer All-Inclusive, Relaxing and Romantic Vacations**
- **Gen X are Vacation Deprived Road Trip Warriors, Traveling Less Frequently than Other Generations**
- **Baby Boomers Are Decisive and Confident Travelers, and Not Tied to Budget**
THANK YOU

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