CANADIAN MULTI-GENERATIONAL TRAVEL TRENDS

Travel Habits and Behaviors of Generation Z, Millennials, Generation X, and Baby Boomers
Data Collection Method
Quantitative Survey

Field Work
30 March – 7 April 2017

Qualifying Criteria
Must have booked online travel in the past year

Sample Size | Total: n=1001
Canadian Travellers
Generation Z (n=256)  Generation X (n=275)
Millennials (n=274)   Boomers (n=196)

Generational Ages
Generation Z = 18-23  Generation X = 36-55
Millennials = 24-35   Boomers = 56+

METHODOLOGY
ONLINE SURVEY
HOW THEY TRAVEL
MILLENIALS TAKE THE MOST TRIPS

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

Q9: Typically, how many personal/leisure and business trips do you take per year?

Q15. How long was your vacation?
ALL GENERATIONS PREFER TO TRAVEL BEYOND THEIR BORDERS

Millennials and Boomers are especially fond of international vacations

Q14. Was the trip....?
VISITING FAMILY AND RELAXING VACATIONS ARE MOST POPULAR

All generations travel to visit family, relax, and sightsee while Millennials and Gen X also travel for family play.

Q10: What types of vacations have you taken in the past year?

- **Visiting Family**
  - Gen Z (18 - 23): 52%
  - Millennials (24 - 35): 49%
  - Gen X (36 – 55): 49%
  - Boomers (56+): 51%

- **Relaxing**
  - Gen Z: 47%
  - Millennials: 48%
  - Gen X: 44%
  - Boomers: 49%

- **Sight-seeing**
  - Gen Z: 42%
  - Millennials: 44%
  - Gen X: 42%
  - Boomers: 39%

- **Special Event**
  - Gen Z: 25%
  - Millennials: 22%
  - Gen X: 20%
  - Boomers: 16%

- **Family Play**
  - Gen Z: 16%
  - Millennials: 25%
  - Gen X: 25%
  - Boomers: 11%

**Notable Generational Difference**
- Gen Z (18 - 23)
- Millennials (24 - 35)
- Gen X (36 – 55)
- Boomers (56+)

*Experedia Group Media Solutions*
TRANSPORTATION IS CONSISTENT ACROSS GENERATIONS

All generations prefer to take to the skies, although Gen X will also hit the road.
ALL GENERATIONS PREFER HOTEL STAYS

Boomers show a slight preference than other generations for staying at a resort

Q17. Where did you stay on your last trip?

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<tr>
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<tbody>
<tr>
<td>Hotel</td>
<td>54%</td>
<td>56%</td>
<td>60%</td>
<td>45%</td>
</tr>
<tr>
<td>With Family / Friends</td>
<td>18%</td>
<td>18%</td>
<td>16%</td>
<td>15%</td>
</tr>
<tr>
<td>Resort</td>
<td>14%</td>
<td>14%</td>
<td>12%</td>
<td>19%</td>
</tr>
<tr>
<td>Alternative Accommodations</td>
<td>7%</td>
<td>8%</td>
<td>7%</td>
<td>7%</td>
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</table>
YOUNGER TRAVELLERS MORE APT TO BUDGET

All generations spend almost half on hotel and flight

Budget a Primary Factor?

- Yes
- No

82% 74% 69% 67%

<table>
<thead>
<tr>
<th>Proportion Spent On</th>
<th>Flight</th>
<th>Hotel</th>
<th>Food</th>
<th>Transportation</th>
<th>Attractions</th>
<th>Home sharing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gen Z (18 - 23)</td>
<td>82%</td>
<td>74%</td>
<td>69%</td>
<td>67%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Millennials (24 - 35)</td>
<td>82%</td>
<td>74%</td>
<td>69%</td>
<td>67%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gen X (36 - 55)</td>
<td>82%</td>
<td>74%</td>
<td>69%</td>
<td>67%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>boomers (56+)</td>
<td>82%</td>
<td>74%</td>
<td>69%</td>
<td>67%</td>
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</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?

YOUNGER GENERATIONS BOOKED VACATION MOST RECENTLY

Boomers are planners and Millennials are least likely to have booked a year ago

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<tr>
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<tbody>
<tr>
<td>Less than 3 months ago</td>
<td>39%</td>
<td>38%</td>
<td>39%</td>
<td>31%</td>
</tr>
<tr>
<td>3-5 months ago</td>
<td>23%</td>
<td>24%</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>6 months ago</td>
<td>18%</td>
<td>25%</td>
<td>20%</td>
<td>26%</td>
</tr>
<tr>
<td>A year ago</td>
<td>21%</td>
<td>21%</td>
<td>24%</td>
<td>24%</td>
</tr>
</tbody>
</table>

Notable Generational Difference

- Gen Z (18 - 23): 39%
- Millennials (24 - 35): 38%
- Gen X (36 – 55): 39%
- Boomers (56+): 31%

Q7: When was the last time you booked travel on a travel website for a personal vacation/holiday?
TRAVELLER ATTITUDES AND INFLUENCES
YOUNGER GENERATIONS ARE MORE DESTINATION INDECISIVE

All generations, even Boomers, are deciding between multiple destinations.

Q23. Which of the following options best describes the way you feel when you first decide to take a trip? (Please select one)
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<tr>
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</thead>
<tbody>
<tr>
<td>Online Travel Agency</td>
<td>47%</td>
<td>54%</td>
<td>57%</td>
<td>47%</td>
</tr>
<tr>
<td>Search Engines</td>
<td>52%</td>
<td>52%</td>
<td>50%</td>
<td>51%</td>
</tr>
<tr>
<td>Travel Review Sites</td>
<td>41%</td>
<td>41%</td>
<td>42%</td>
<td>46%</td>
</tr>
<tr>
<td>Discussed with Family/Friends</td>
<td>42%</td>
<td>42%</td>
<td>37%</td>
<td>38%</td>
</tr>
<tr>
<td>Comparison Travel Sites</td>
<td>33%</td>
<td>33%</td>
<td>38%</td>
<td>37%</td>
</tr>
<tr>
<td>Hotel Sites</td>
<td>26%</td>
<td>26%</td>
<td>25%</td>
<td>27%</td>
</tr>
</tbody>
</table>

Q35. Please indicate all of the resources you used when you planned your last trip? (Please select all that apply)
OTAs CONVERT THE MOST TRAVELLERS ACROSS GENERATIONS

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

- **Online Travel Agency**
  - Gen Z (18-23):
    - 55%
  - Millennials (24-35):
    - 53%
  - Gen X (36-55):
    - 52%
  - Boomers (56+):
    - 46%

- **Airline Sites**
  - Gen Z (18-23):
    - 27%
  - Millennials (24-35):
    - 31%
  - Gen X (36-55):
    - 24%
  - Boomers (56+):
    - 24%

- **Hotel Sites**
  - Gen Z (18-23):
    - 21%
  - Millennials (24-35):
    - 21%
  - Gen X (36-55):
    - 21%
  - Boomers (56+):
    - 21%

- **Alternative Accommodation Sites**
  - Gen Z (18-23):
    - 11%
  - Millennials (24-35):
    - 16%
  - Gen X (36-55):
    - 16%
  - Boomers (56+):
    - 16%

- **Car Rental Sites**
  - Gen Z (18-23):
    - 7%
  - Millennials (24-35):
    - 8%
  - Gen X (36-55):
    - 11%
  - Boomers (56+):
    - 13%

- **Destination Sites**
  - Gen Z (18-23):
    - 10%
  - Millennials (24-35):
    - 9%
  - Gen X (36-55):
    - 9%
  - Boomers (56+):
    - 10%

Boomers looked more to airline, hotel, and car rental sites to book travel.

**Notable Generational Difference**
VALUE AND EXPLORATION DRIVE
TRAVELLER SENTIMENT

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

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<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>I look for the best deals and most value for my dollar</td>
<td>94%</td>
<td>93%</td>
<td>96%</td>
<td>93%</td>
</tr>
<tr>
<td>I’ll go anywhere that allows me to explore the outdoors and be active</td>
<td>84%</td>
<td>82%</td>
<td>77%</td>
<td>71%</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>80%</td>
<td>73%</td>
<td>57%</td>
</tr>
<tr>
<td>I often opt for 'off the beaten path' locations and/or recommendations from locals</td>
<td>66%</td>
<td>70%</td>
<td>67%</td>
<td>62%</td>
</tr>
<tr>
<td>I prefer to go to museums, historical sites and arts &amp; culture fill up my travel itinerary</td>
<td>66%</td>
<td>71%</td>
<td>69%</td>
<td>59%</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>63%</td>
<td>61%</td>
<td>64%</td>
<td>46%</td>
</tr>
<tr>
<td>I’m all about taking a nap on the beach, spa treatments and all-day relaxation</td>
<td>64%</td>
<td>62%</td>
<td>59%</td>
<td>49%</td>
</tr>
<tr>
<td>I plan all my travel around where and what I eat and drink</td>
<td>56%</td>
<td>58%</td>
<td>44%</td>
<td>31%</td>
</tr>
<tr>
<td>I don’t like travelling far, as long as I’m not at work, I’m on vacation</td>
<td>25%</td>
<td>31%</td>
<td>31%</td>
<td>26%</td>
</tr>
</tbody>
</table>

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

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)
WHEN PRIORITIZING, ACTIVITIES AND UNIQUE EXPERIENCES DRIVE TRAVEL DECISIONS

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.
FACEBOOK INFLUENTIAL IN TRAVEL DECISIONS FOR YOUNGER GENERATIONS

Boomers claim social media has little influence on travel booking decisions

Q28. Which of the following social media sites influence or inspire your decision-making process in booking a trip? (Please select all that apply)
**DEALS AND REVIEWS CAN HELP TRAVELLERS CONVERT**

Destination content closely follows in influencing travellers

- I look for deals before making a decision: 93%, 90%, 91%, 93%
- I read reviews of places I want to visit from sites like TripAdvisor before making my final decision: 84%, 85%, 85%, 83%
- Informative content from destinations and/or travel brands can influence my decision making process: 79%, 80%, 82%, 80%

- I talk to people who have visited the place before making a decision: 80%, 77%, 70%, 62%
- Ads can be influential in my decision making process: 52%, 56%, 55%, 52%
- I use loyalty programs in my decision making process: 47%, 56%, 48%, 51%

**Q32. Please select to what extent you agree with the following statements. (Please select one for each statement)**
EFFECTIVE ADS FEATURE RELEVANT DEALS, INFORMATIVE CONTENT, AND APPEALING IMAGERY

Q33. How can ads help influence in your decision making process? (Select all that apply)

- The deals advertised look appealing
- The imagery in the ad looks appealing
- The content in the ad is informative
- The ad includes helpful reviews
- None of the above

Notable Generational Difference

- Gen Z (18 - 23)
- Millennials (24 - 35)
- Gen X (36 – 55)
- Boomers (56+)

19% of Gen Z prefer relevant deals, 56% of Millennials prefer informative content, 45% of Gen X prefer appealing imagery, and 30% of Boomers prefer helpful reviews. 61% of all respondents find the deals appealing, 50% the imagery appealing, 39% informative content, and 30% helpful reviews.
### DESKTOPS DOMINATE THE PATH, SMARTPHONES IN TRIP

<table>
<thead>
<tr>
<th></th>
<th>Smartphone</th>
<th>Desktop/Laptop</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>When I’m looking for inspiration on where to travel</strong></td>
<td>58%  46%  23%  9%</td>
<td>71%  76%  84%  93%</td>
</tr>
<tr>
<td><strong>When I’m researching on where to travel</strong></td>
<td>41%  37%  19%  7%</td>
<td>80%  81%  88%  96%</td>
</tr>
<tr>
<td><strong>When I’m booking the travel</strong></td>
<td>21%  20%  11%  4%</td>
<td>88%  88%  91%  95%</td>
</tr>
<tr>
<td><strong>During my trip</strong></td>
<td>82%  71%  61%  46%</td>
<td>35%  34%  38%  40%</td>
</tr>
</tbody>
</table>


Q47. For each of the following statements, which device(s) do you use? Please select all that apply.
Total (n=8006) UK (n=1001) Germany (n=1000) France (n=1002) China (n=1000) Japan (n=1001) Australia (n=1000) Canada (n=1001) US (n=1001)
KEY INSIGHTS FOR CANADIAN GENERATIONS

**Gen Z**

- Travel 21 days a year, and although they have a budget in mind when planning a trip, they are the most open-minded when it comes to destination inspiration. They rely on search engines and online travel agencies (OTAs) for planning and booking.

- They prioritize activities and once in a lifetime experiences, and rank highest in the #YOLO mindset and going places where they can explore the outdoors and be active.

**Millennials**

- Travel 26 days a year and prefer to explore international destinations, as they are most likely to travel beyond their borders.

- Tackling their bucket list, #YOLO experiences, and finding off the beaten path locations are important to Millennials, but they also look to fill their itinerary with museums, historical sites, and arts and culture more than other generations.

**Gen X**

- Travel 21 days a year, choose hotel stays more than any other generation, and are most likely to travel by car.

- More than 50 percent turn to OTAs for planning and booking, and they prioritize activities, deals and the lowest price when booking a trip.

**Boomers**

- Compared to other generations, Baby Boomers travel the most (28 days a year) and nearly half have already decided on a destination when they decide to take a trip.

- They are more likely to take an international getaway than stay within their own borders and are also quite adventurous once they get to their destination. Boomers are less likely than other generations to stay with family or friends, but are more likely to stay in a resort.
KEY TAKEAWAYS

- Gen Z Visit Family, Sightsee, and Prefer Outdoor Exploration
- Destination Indecisive Millennials Prioritize Activities and Price
- Gen X Likes Consistency: They Are the Most Likely Generation to Drive to a Destination and Choose Hotel Stays
- Baby Boomers Are Decisive, Less Budget Conscious and Not Influenced by Social Media
THANK YOU

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