MULTI-GENERATIONAL TRAVEL TRENDS

Connecting the Digital Dots: The Motivations and Mindset of European Travellers

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METHODOLOGY

ONLINE SURVEY

Sample Size

UK: n=1001
Germany: n=1000
France: n=1002
Total Europe: n=3003

Data Collection Method

Quantitative Survey

Field Work

30 March – 7 April 2017

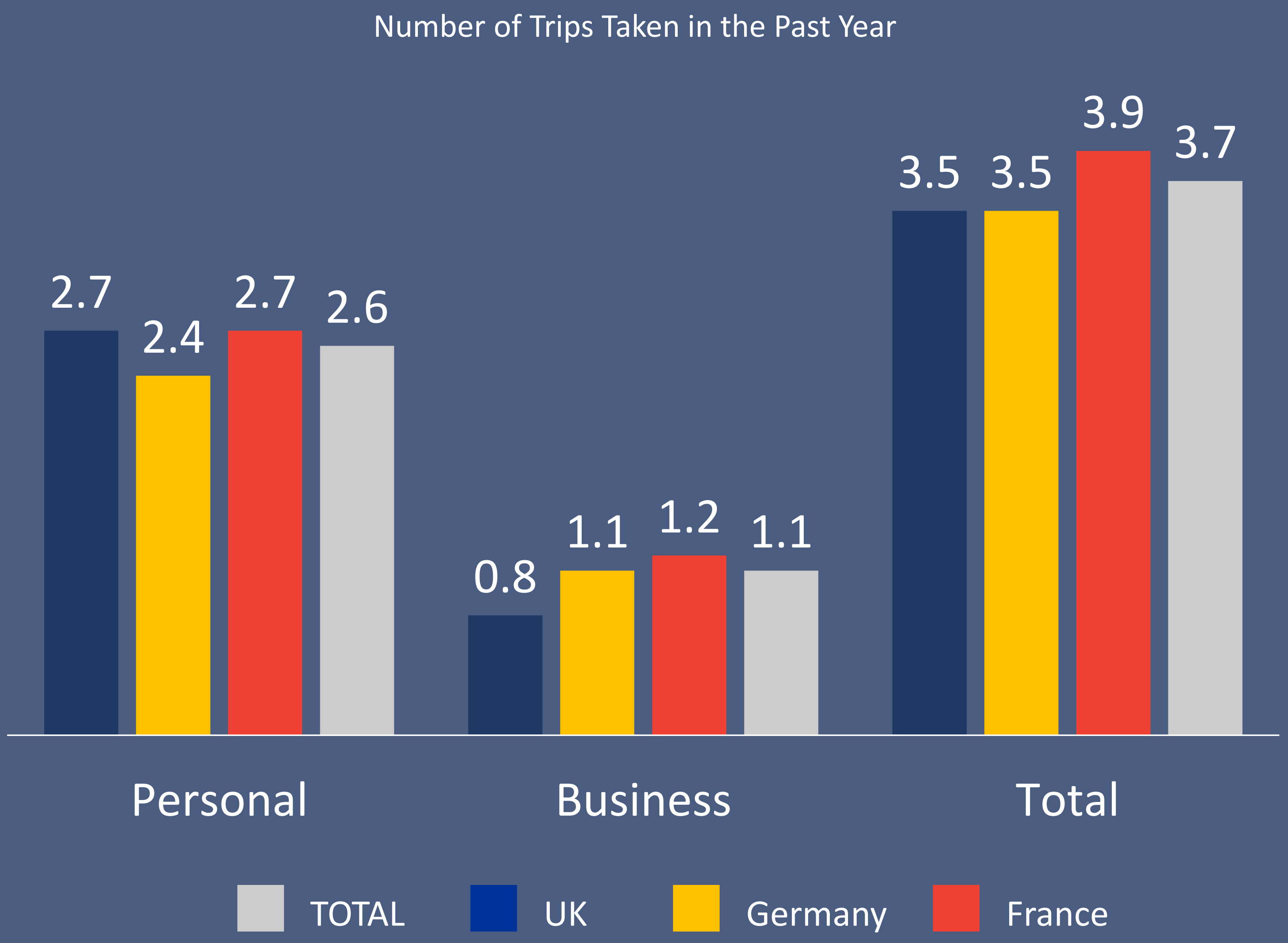
Qualifying Criteria

Must have booked online travel in the past year

LAST TRIP LOOK BACK BY COUNTRY

EUROPEAN TRAVELLERS **TOOK MORE THAN 3 TRIPS IN THE LAST YEAR**

British and French travellers took the most personal trips, and French travellers took the most trips total



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Q9: Typically, how many personal/leisure and business trips do you take per year?
Total (n=3003) UK (n=1001) Germany (n=1000) France (n=1002)

RELAXING TRIPS WERE POPULAR, ESPECIALLY WITH GERMAN TRAVELLERS

Sight-seeing holidays were also big with British and French travellers, while family play trips were only notable with the French

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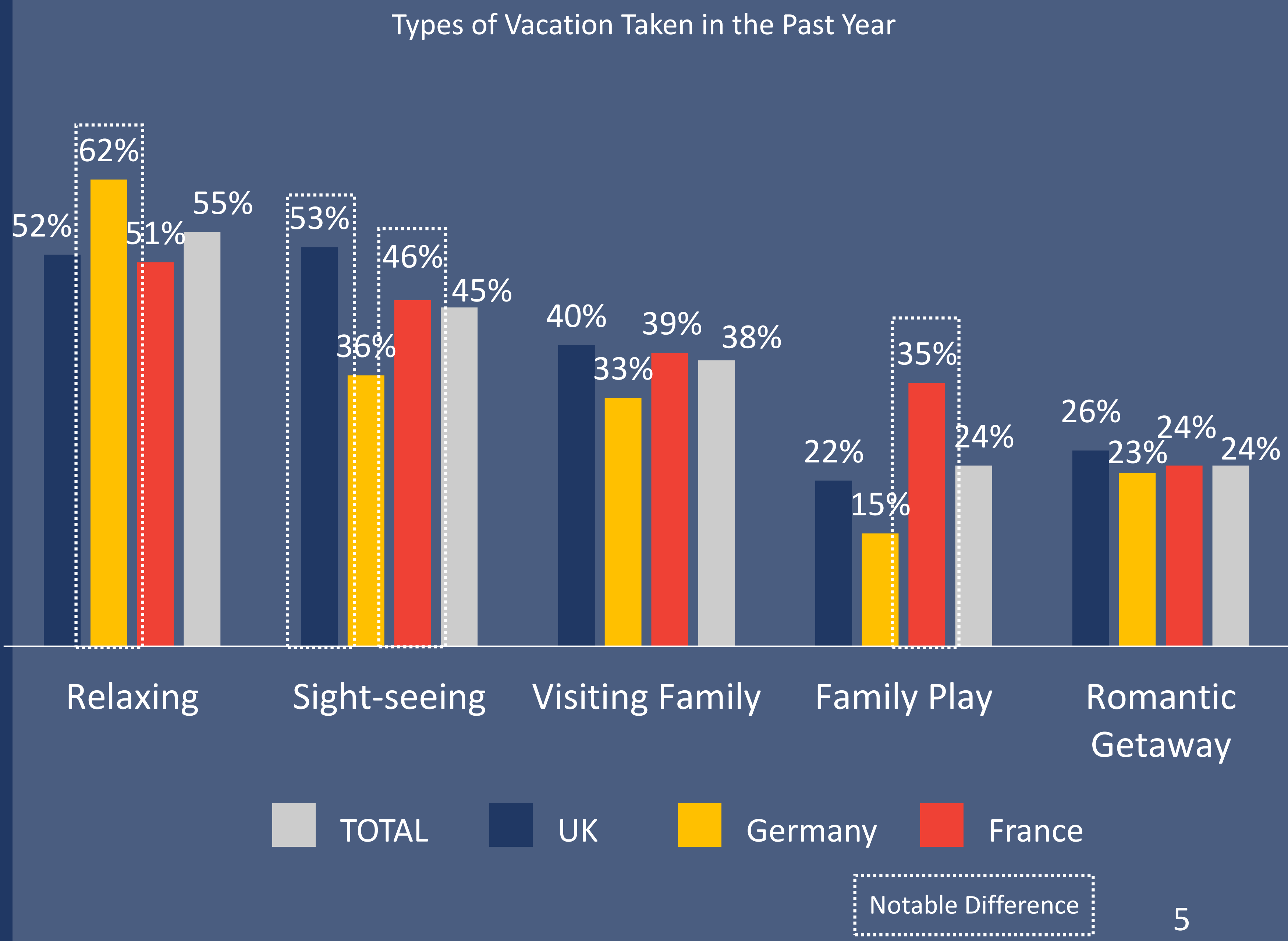
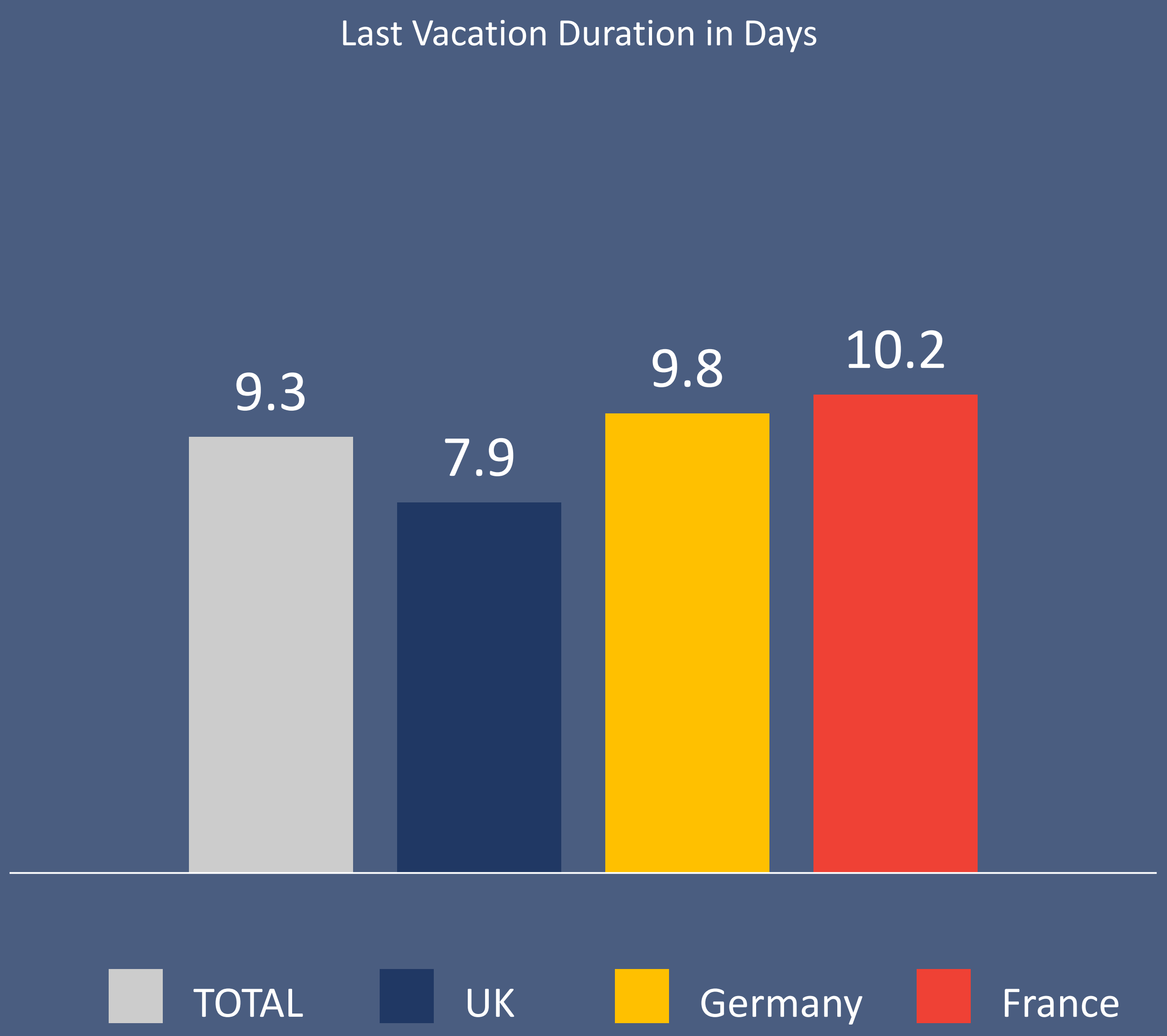


Q10: What types of vacations have you taken in the **past year**?
Total (n=3003) UK (n=1001) Germany (n=1000) France (n=1002)



EUROPEAN TRAVELLERS TOOK ON AVERAGE **MORE THAN 9 DAYS FOR HOLIDAY**

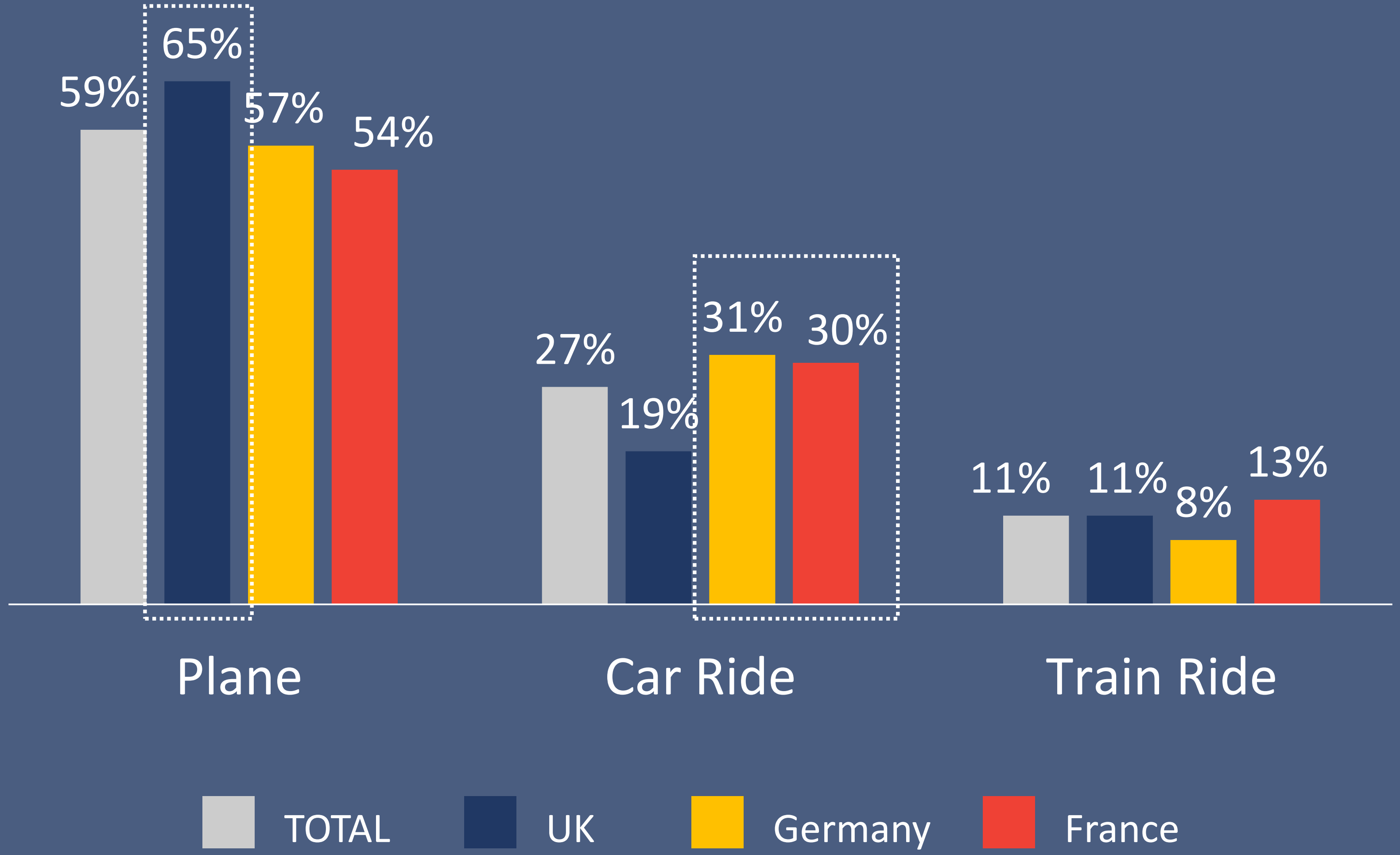
At nearly or more than 10 days in length, the last trip French and German travellers took was significantly longer than the last British holiday

Q15. How long was your vacation?
Total (n=3003) UK (n=1001) Germany (n=1000) France (n=1002)

EUROPEANS LARGELY **TRAVELLED BY PLANE TO GET TO THEIR LAST DESTINATION**

German and French travellers were more likely than Brits to travel by car

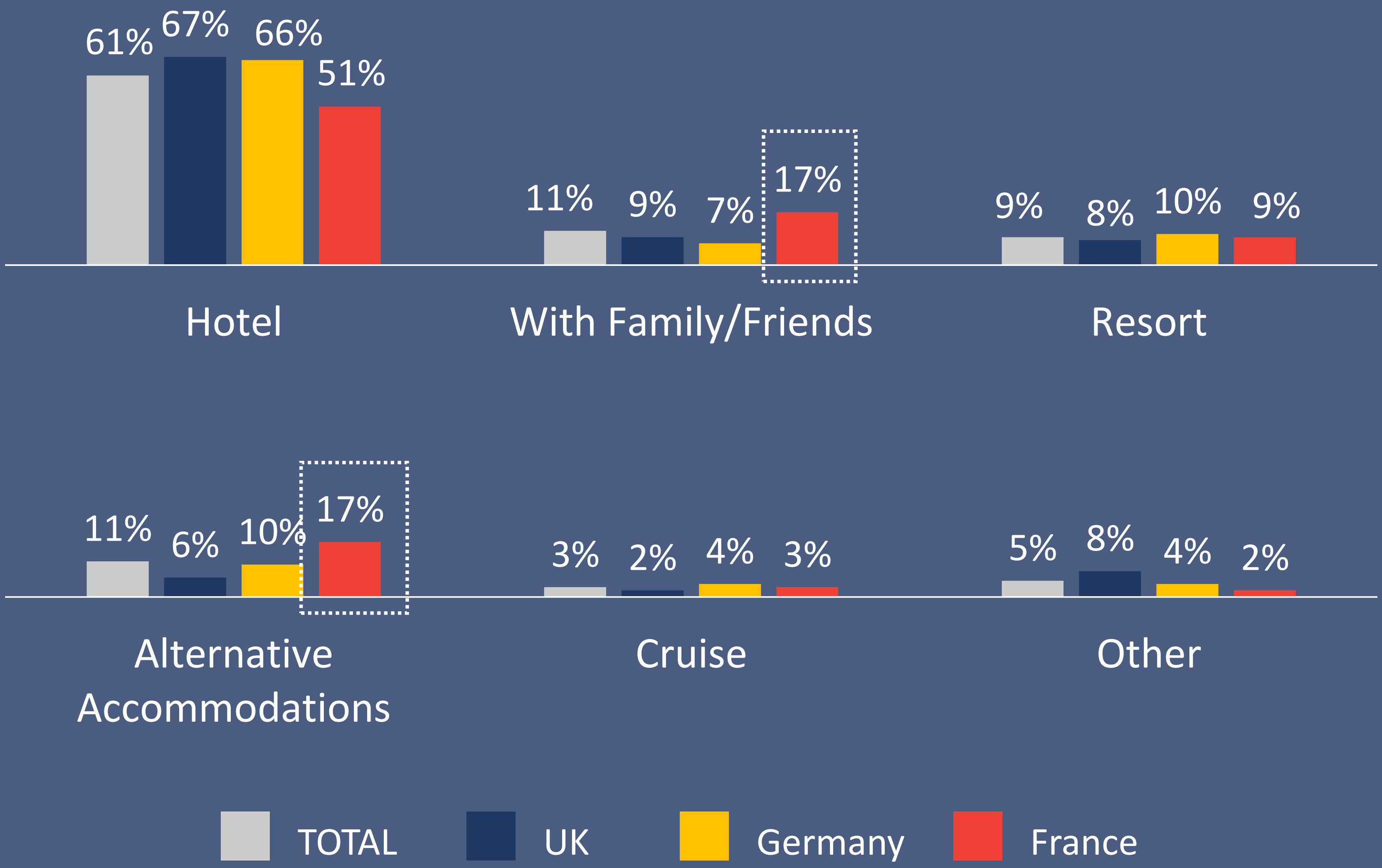
Type of Travel to Last Destination



Notable Difference

Q16. How did you get to your destination?
Total (n=3003) UK (n=1001) Germany (n=1000) France (n=1002)

Accommodations of Last Trip



6 OUT OF 10 EUROPEAN TRAVELLERS STAYED IN HOTELS

French travellers are the least likely to stay in a hotel, and most likely to stay with family or in alternative accommodations

Q17. Where did you stay on your last trip?
Total (n=3003) UK (n=1001) Germany (n=1000) France (n=1002)

Notable Difference

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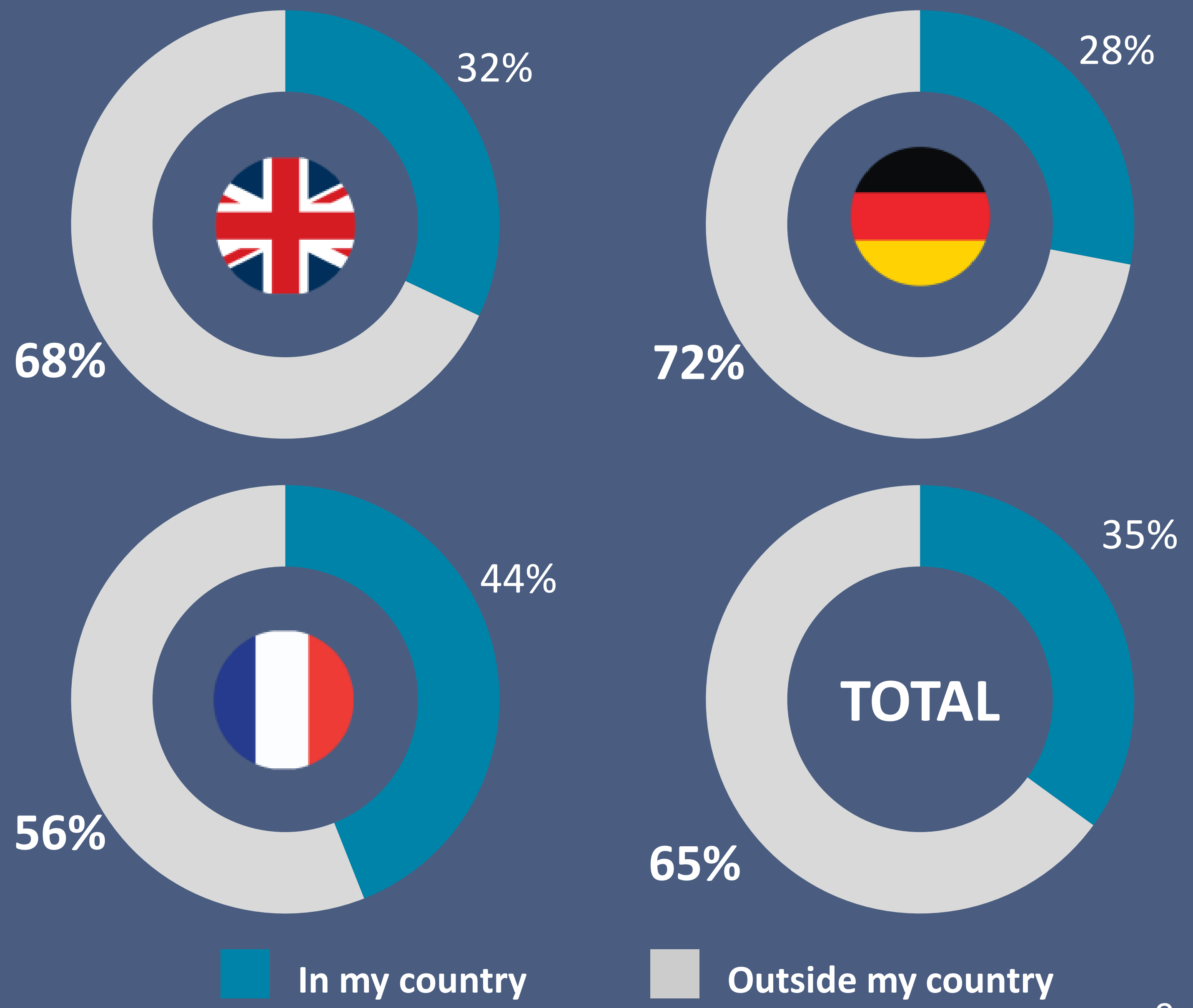
THE MAJORITY OF EUROPEANS **TRAVEL OUTSIDE THEIR COUNTRY ON HOLIDAY**

Germans were most likely to travel abroad, and the French were most closely divided between a holiday in the country or elsewhere



Q14. Was the trip….?
Total (n=3003) UK (n=1001) Germany (n=1000) France (n=1002)

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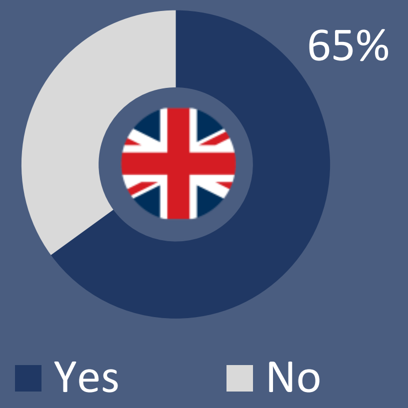
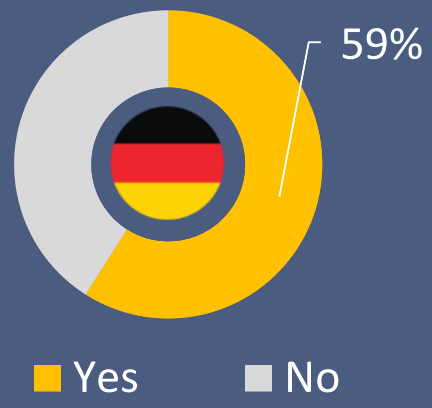
BUDGET WAS A PRIMARY FACTOR FOR EUROPEAN TRAVELLERS – ESPECIALLY THE FRENCH

Lodging is a significant portion of the budget for each—especially for British and German travellers—with the only difference in the top five being German travellers budgeted more for attractions than transportation



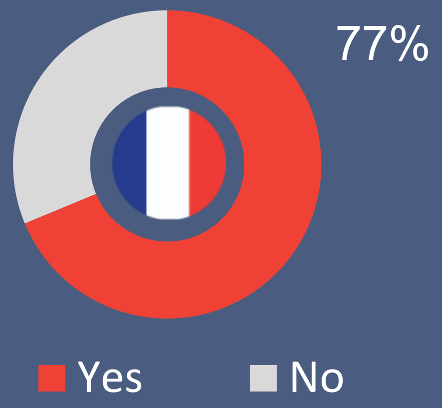
Proportion Spent On

Hotel	31%
Flight	20%
Food	16%
Transportation	10%
Attractions/Tours	10%
Shopping	7%
Alternative Accom.	3%
Other	3%



Proportion Spent On

Hotel	31%
Flight	17%
Food	16%
Attractions/Tours	10%
Transportation	8%
Shopping	8%
Alternative Accom.	6%
Other	4%



Proportion Spent On

Hotel	22%
Flight	18%
Food	16%
Transportation	12%
Attractions/Tours	11%
Shopping	9%
Alternative Accom.	7%
Other	4%

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?
Total (n=3003) UK (n=1001) Germany (n=1000) France (n=1002)

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LAST TRIP LOOK BACK BY GENERATION

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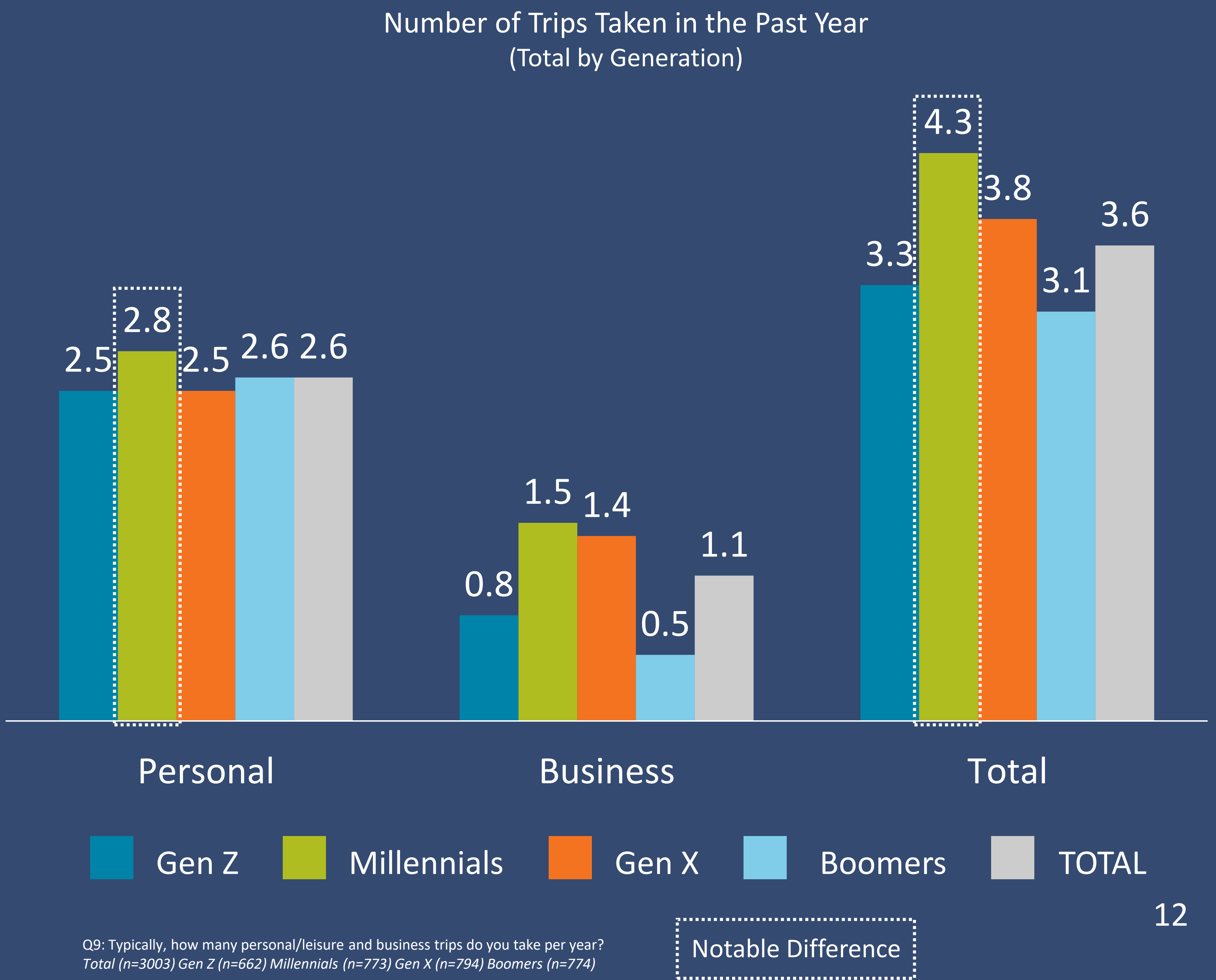
MILLENNIALS TOOK THE MOST TRIPS – BOTH PERSONAL AND BUSINESS

Gen X followed due to the number of business trips they took



Q9: Typically, how many personal/leisure and business trips do you take per year?
Total (n=3003) Gen Z (n=662) Millennials (n=773) Gen X (n=794) Boomers (n=774)

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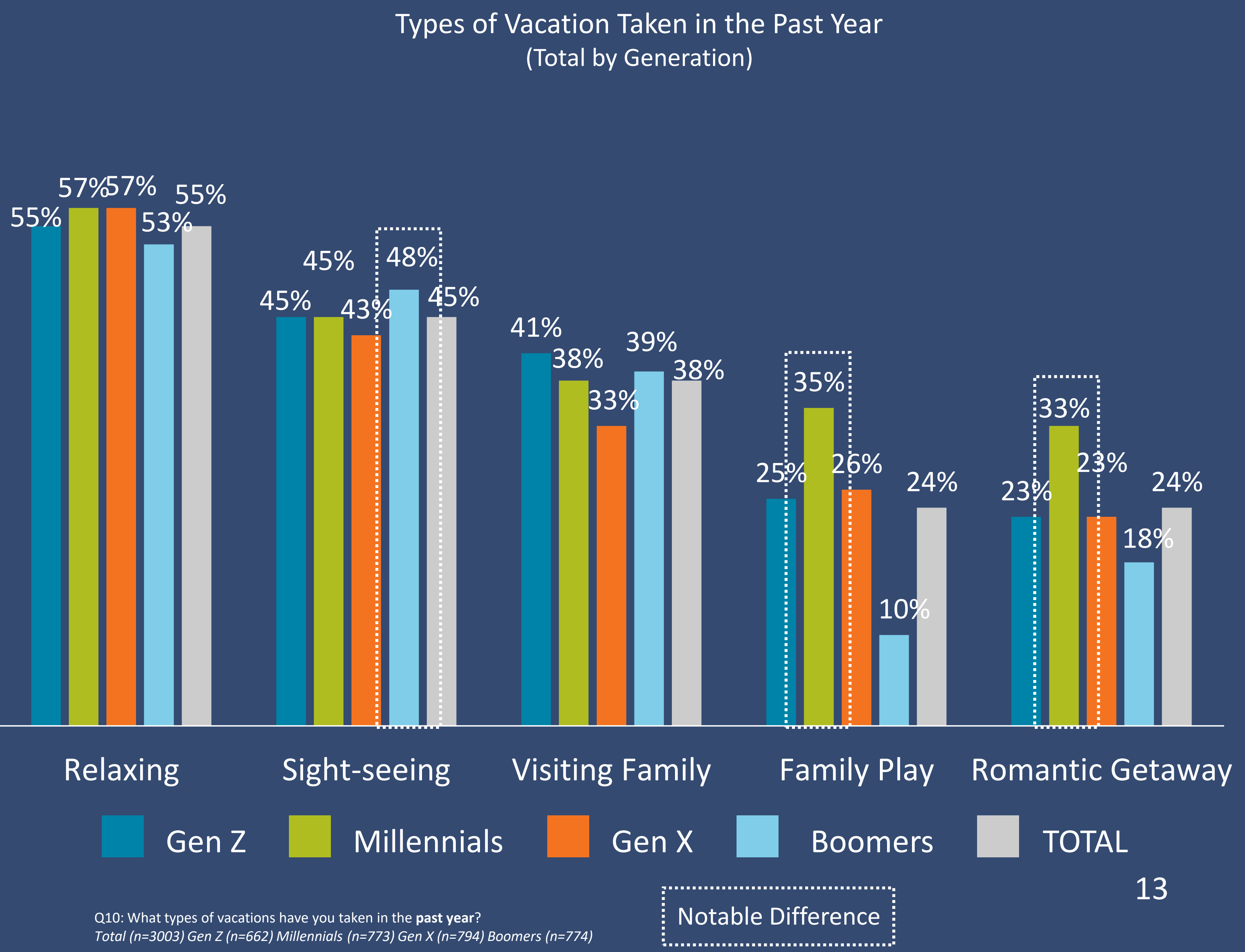
ALL PREFER RELAXING HOLIDAYS – ESPECIALLY MILLENNIALS & GEN X

Boomers were more likely to take sight-seeing holidays than other generations, while Millennials were significantly more apt to go on Family Play or Romantic Getaways



Q10: What types of vacations have you taken in the **past year**?
Total (n=3003) Gen Z (n=662) Millennials (n=773) Gen X (n=794) Boomers (n=774)

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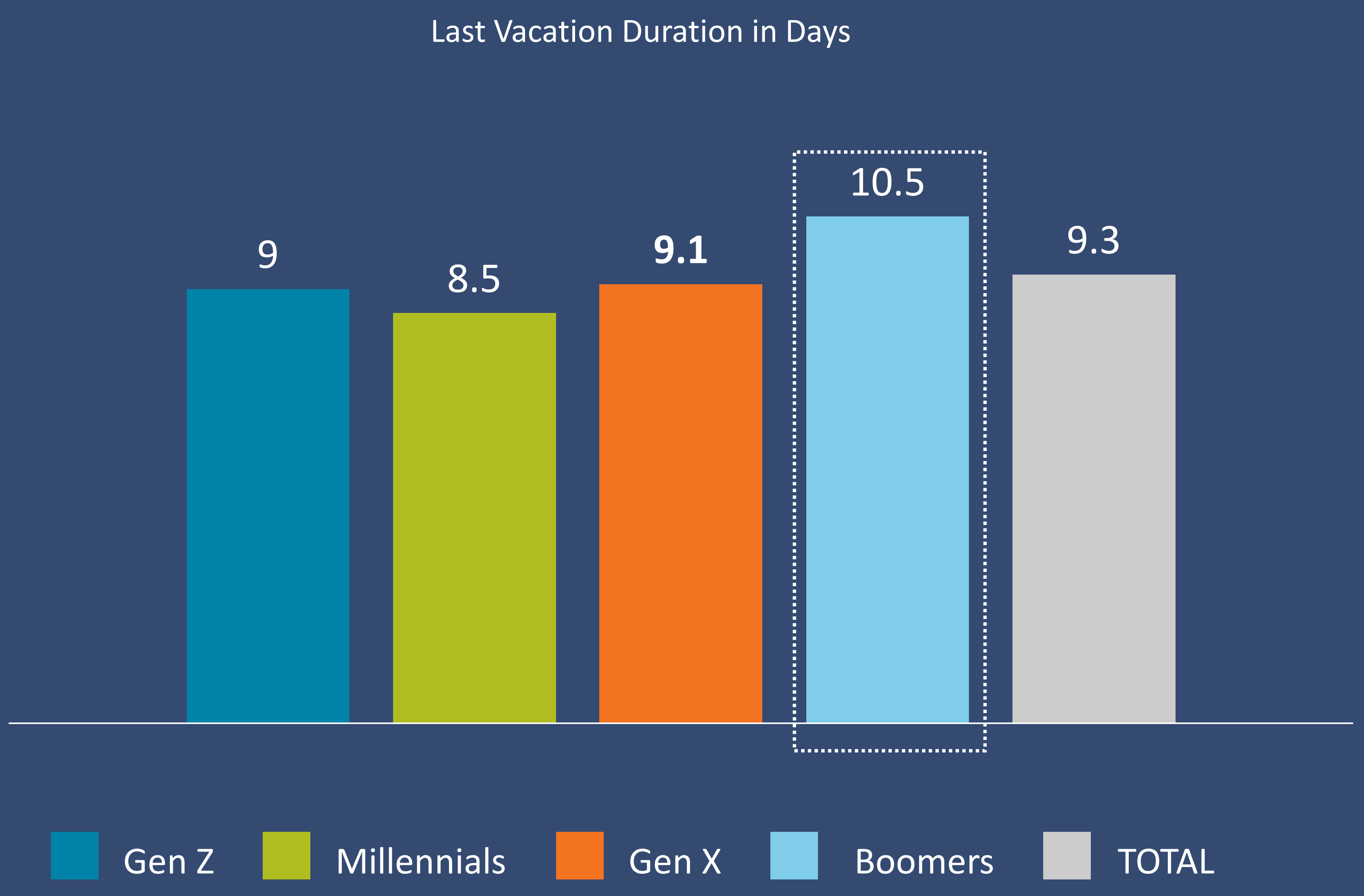
BOOMERS TAKE THE LONGEST TRIPS

At more than 10 days in length, the last trip Boomer travellers took was significantly longer than the other generations, followed by Gen X and Gen Z at about 9 days



Q15. How long was your vacation?
Total (n=3003) Gen Z (n=662) Millennials (n=773) Gen X (n=794) Boomers (n=774)

Notable Difference

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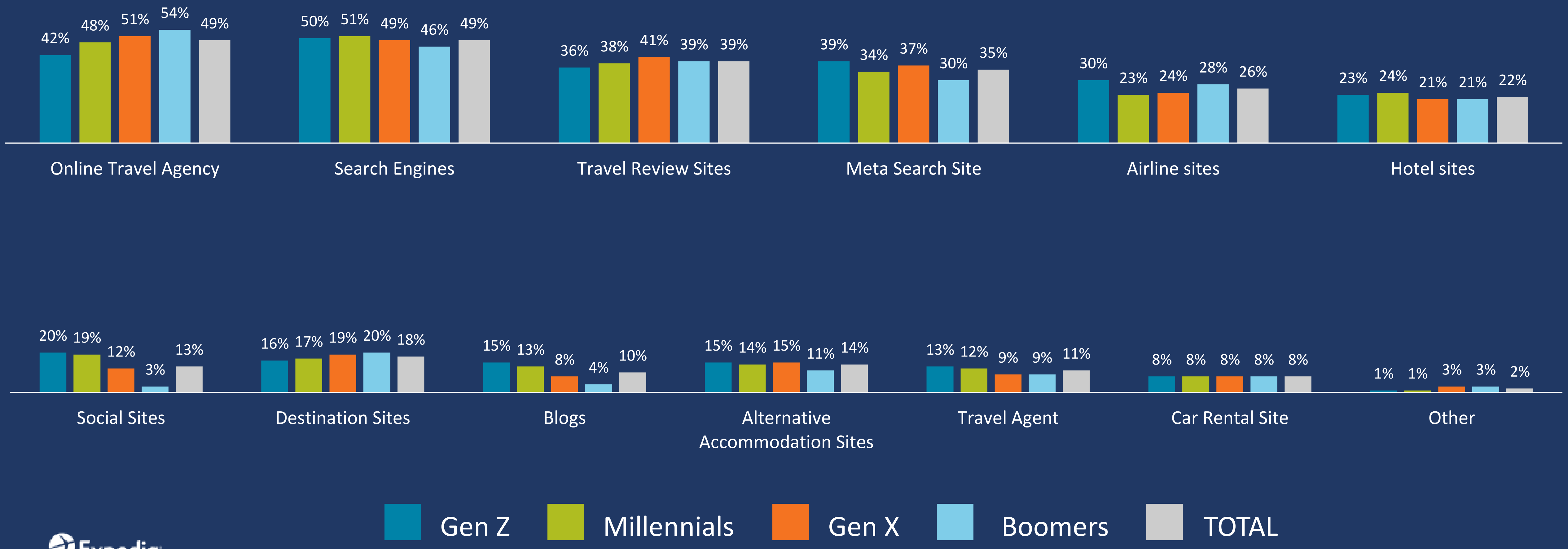
OTAS PROMINENT IN TRAVEL PLANNING

Especially for Gen X and Boomers, who also rely more on reviews

Resources Used For Planning Last Trip

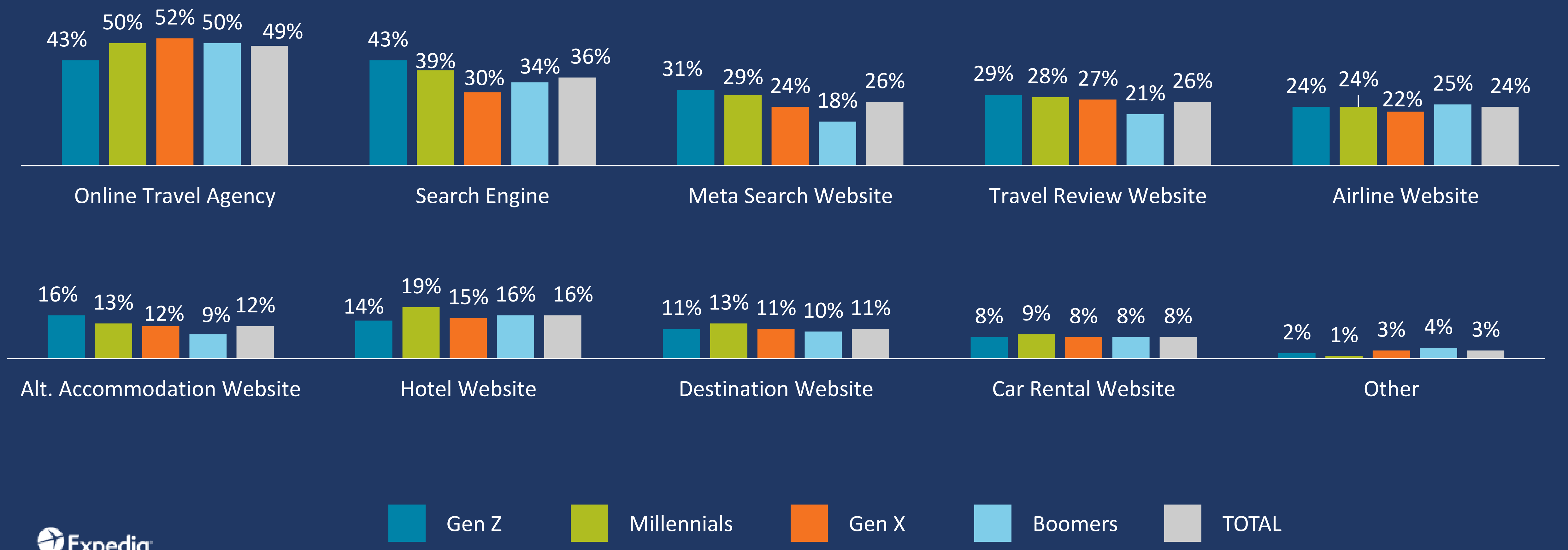


Q35: What resources were used for planning your last trip?
Total (n=3003) Gen Z (n=662) Millennials (n=773) Gen X (n=794) Boomers (n=774)

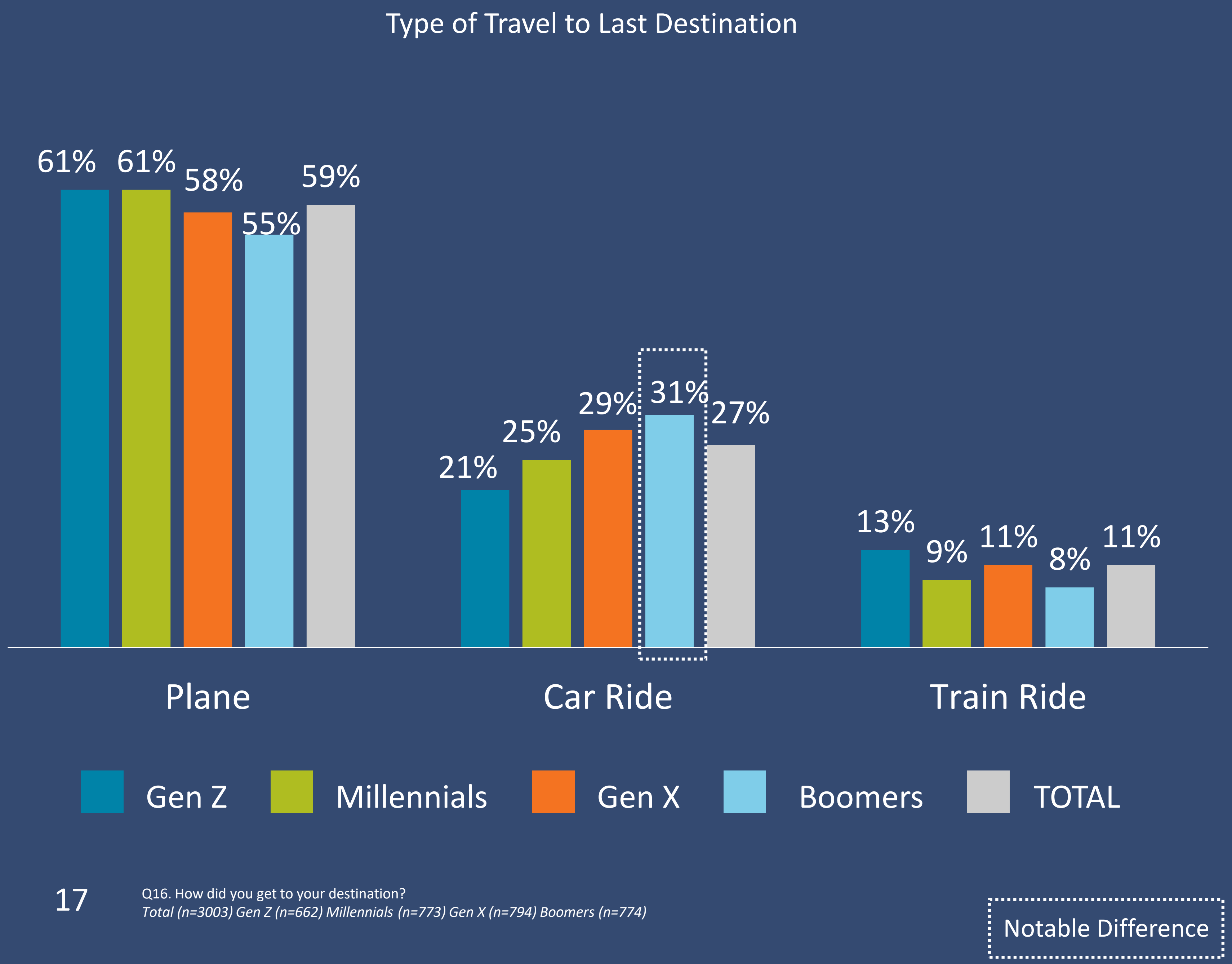
OTAS LEAD THE PACK FOR BOOKING TRAVEL

Gen X uses OTAs significantly more to book than any other resource

Sources Used To Book Travel Online On Last Trip



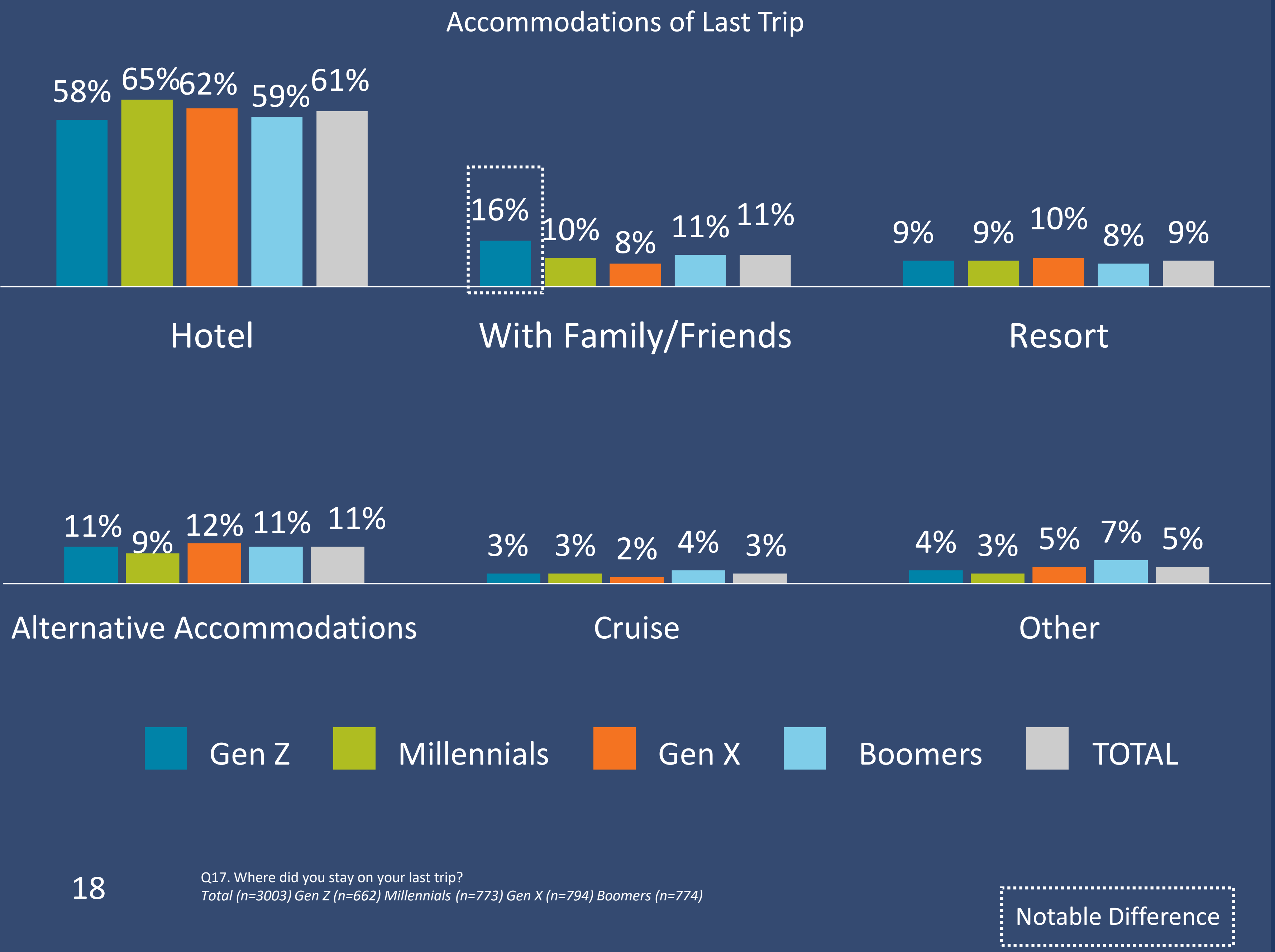
Q38: Please indicate which resources you used to **book travel online on your last trip**
Total (n=3003) Gen Z (n=662) Millennials (n=773) Gen X (n=794) Boomers (n=774)



PLANE TRAVEL MOST POPULAR TO GET TO DESTINATIONS

Boomers and Gen X were more likely to travel by car than the other generations

Q16. How did you get to your destination?
Total (n=3003) Gen Z (n=662) Millennials (n=773) Gen X (n=794) Boomers (n=774)



HOTELS PRIMARY SOURCE OF LODGING ESPECIALLY FOR MILLENNIALS

Gen Z was the most likely of the generations to stay with family and friends

Q17. Where did you stay on your last trip?
Total (n=3003) Gen Z (n=662) Millennials (n=773) Gen X (n=794) Boomers (n=774)

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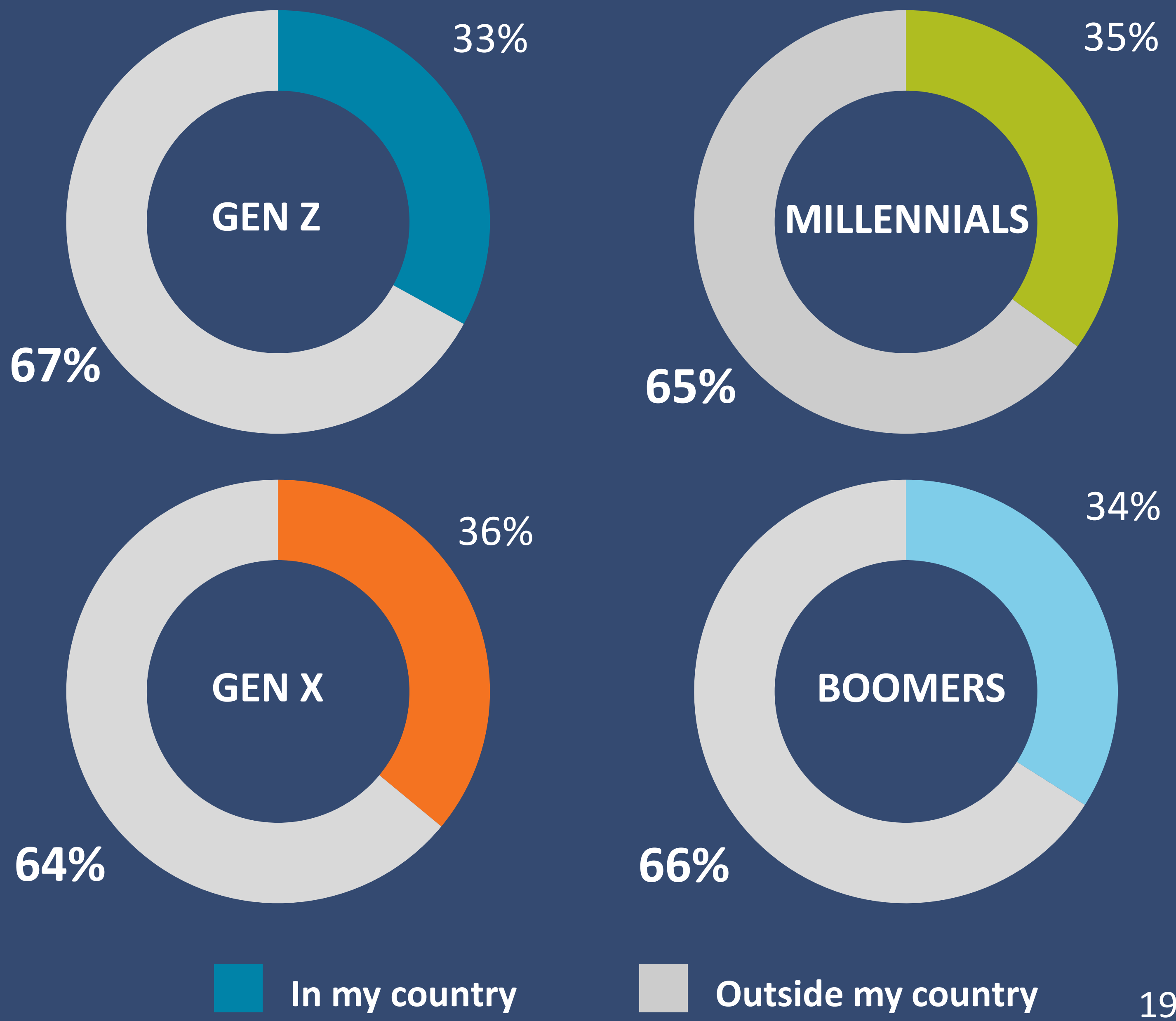
ALL GENERATIONS LIKE TO **EXPERIENCE OTHER COUNTRIES**

There is little difference between the generations in likeliness of travelling outside their country



Q14. Was the trip….?
Total (n=3003) Gen Z (n=662) Millennials (n=773) Gen X (n=794) Boomers (n=774)

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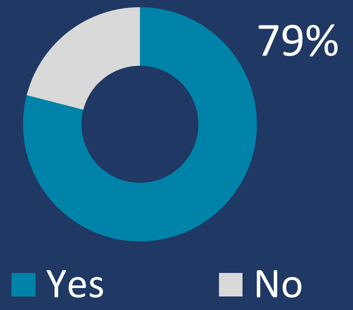
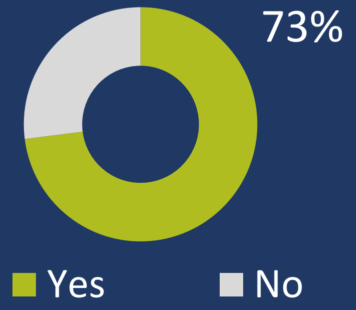
BUDGET KEY FOR YOUNGER GENERATIONS

Younger generations allotted more for flights and attractions/tours than the older generations.



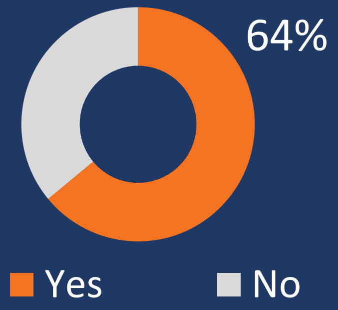
Proportion Spent On

Hotel	25%
Flight	20%
Food	15%
Transportation	11%
Attractions/Tours	11%
Shopping	9%
Alternative Accom.	5%
Other	3%



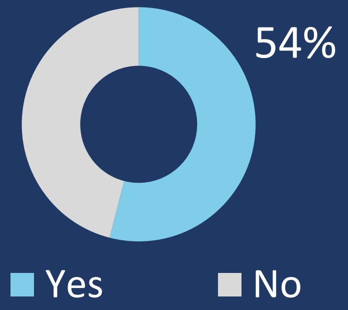
Proportion Spent On

Hotel	28%
Flight	19%
Food	16%
Transportation	10%
Attractions/Tours	11%
Shopping	8%
Alternative Accom.	5%
Other	3%



Proportion Spent On

Hotel	29%
Flight	18%
Food	16%
Transportation	11%
Attractions/Tours	9%
Shopping	8%
Alternative Accom.	6%
Other	3%



Proportion Spent On

Hotel	31%
Flight	16%
Food	17%
Transportation	10%
Attractions/Tours	8%
Shopping	7%
Alternative Accom.	6%
Other	6%

Gen Z Millennials Gen X Boomers

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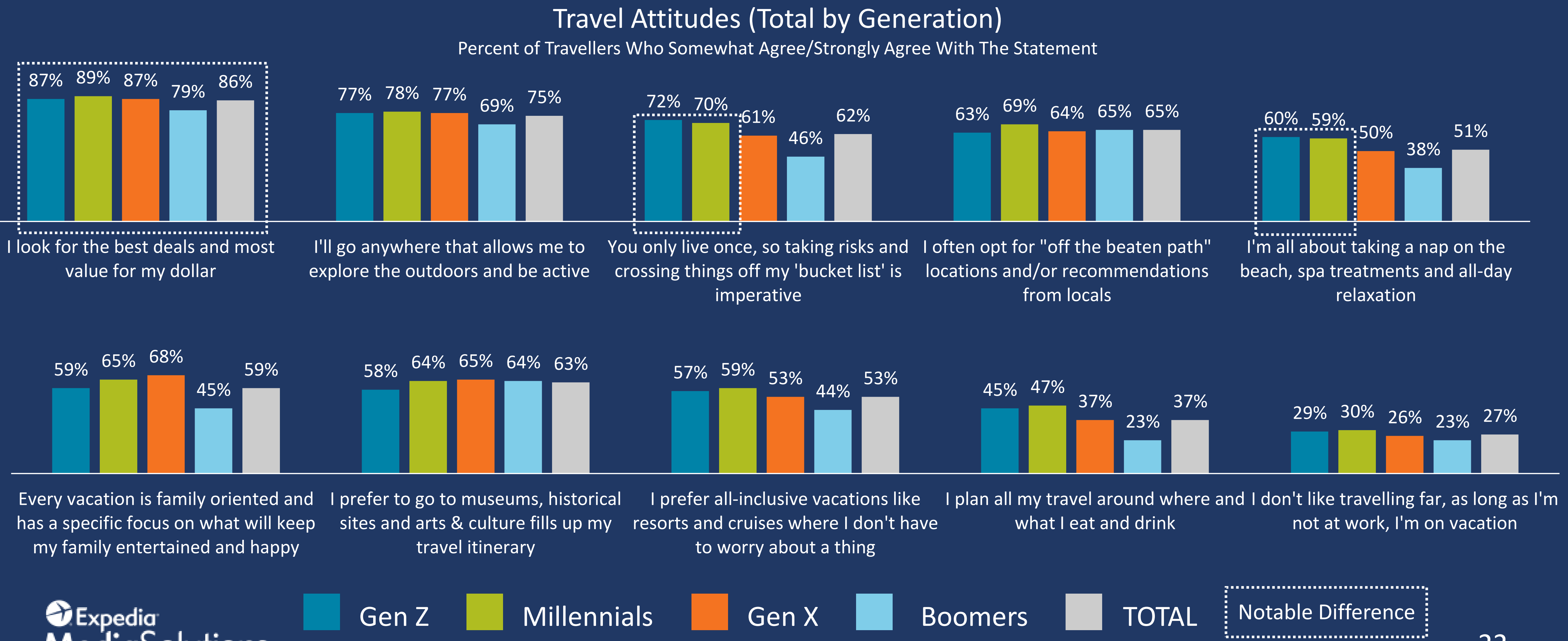
Q18. Was budget a primary factor when you were researching/ booking your last trip?
Q20. What proportion of your travel budget did you spend on each of the following?
Total (n=3003) Gen Z (n=662) Millennials (n=773) Gen X (n=794) Boomers (n=774)

EUROPEAN TRAVELLER ATTITUDES BY GENERATION

MAJORITY LOOK FOR DEALS & VALUE

Outdoors and activities also high for all except Boomers, and the younger generations like bucket list and relaxing trips



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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)*
Total (n=3003) Gen Z (n=662) Millennials (n=773) Gen X (n=794) Boomers (n=774)

WHEN ASKED TO PRIORITIZE **ACTIVITIES & EXPERIENCES RANKED SIGNIFICANTLY HIGHER**

Price and deals still important but not the most important in choosing a holiday

Notable Difference

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. *Total (n=3003)*

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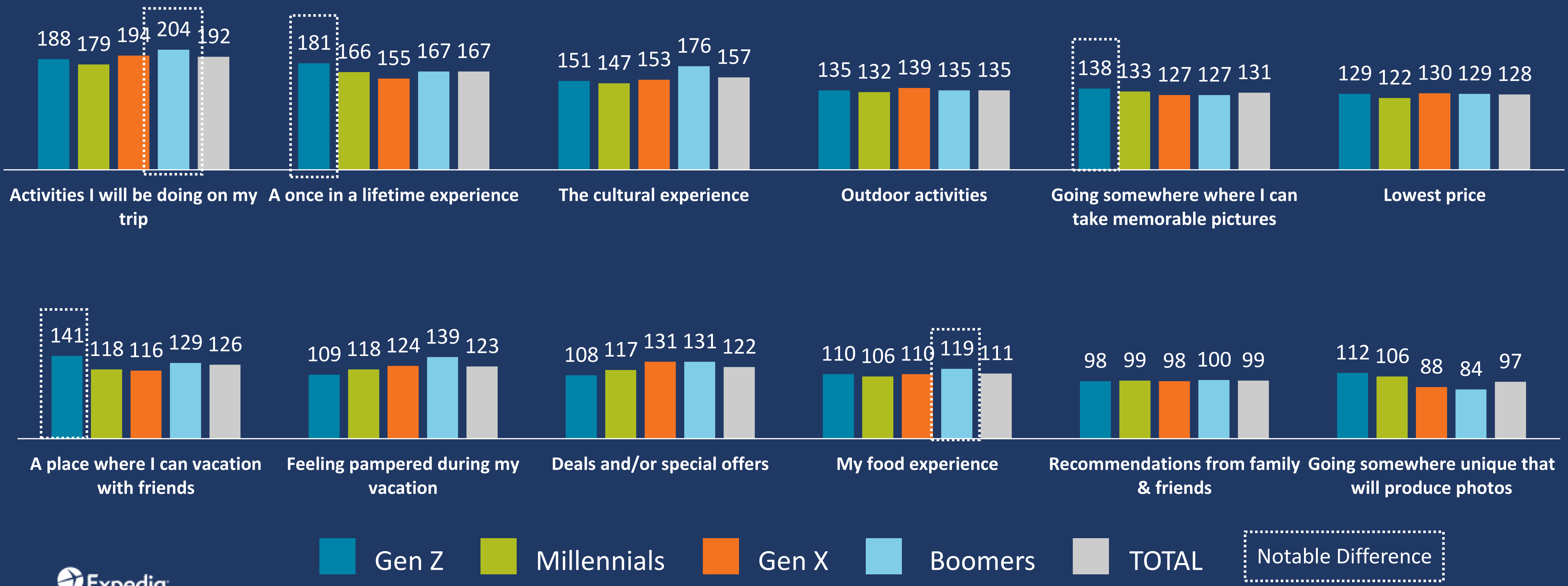
ACTIVITIES & EXPERIENCES RANK TOP FOR ALL

Activities especially high for Boomers – while Gen Z also looks for bucket list experiences and trips with friends



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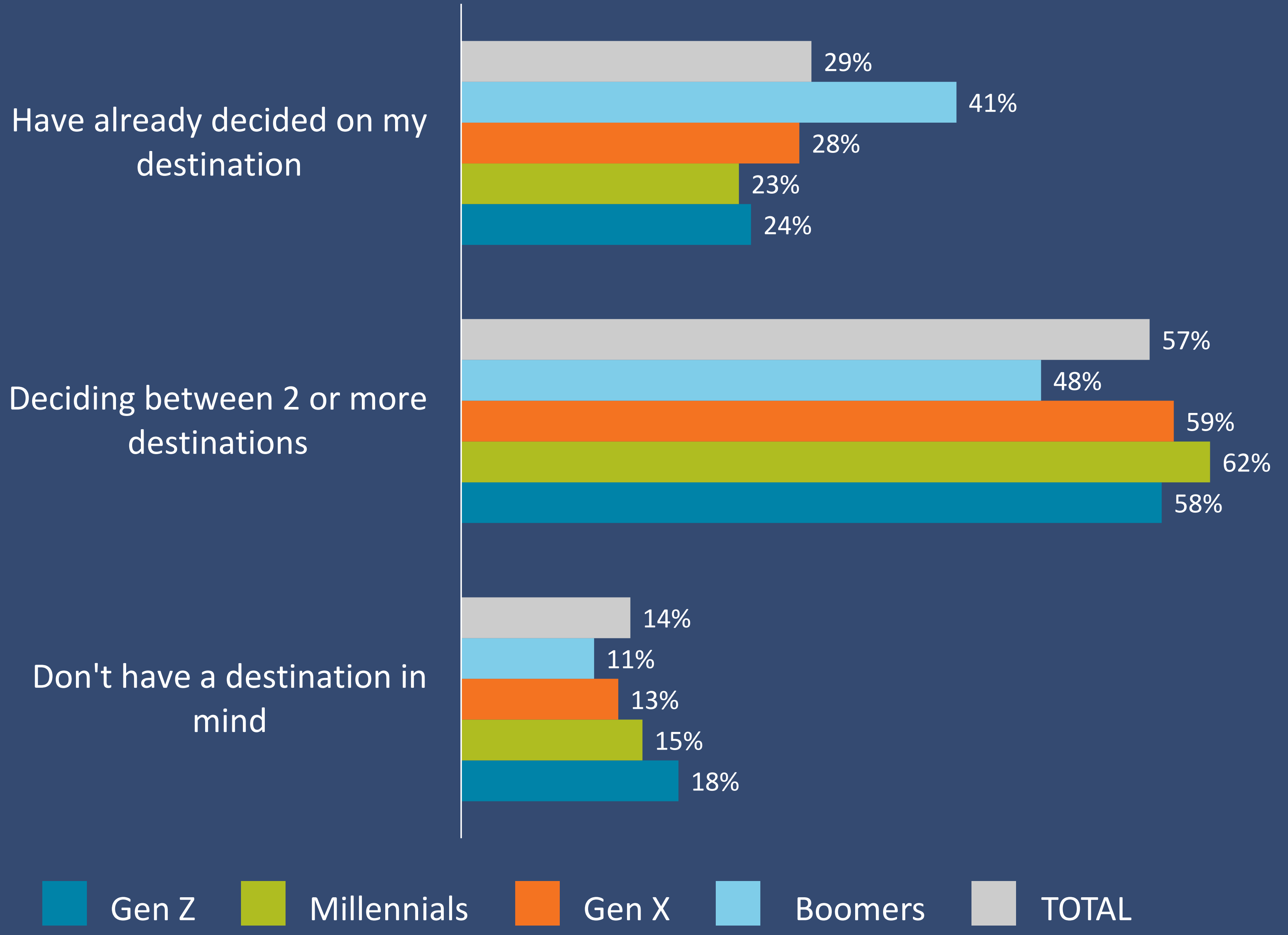
For this exercise, you will go through a small number of different screens where we will ask you to identify which consideration would be **most important** to you in terms of how you choose a vacation/ holiday and which consideration would be **least important** to you in terms of how you choose to purchase a vacation/holiday.
Total (n=3003) Gen Z (n=662) Millennials (n=773) Gen X (n=794) Boomers (n=774)

ALL GENERATIONS **DECIDING BETWEEN MULTIPLE DESTINATIONS**

Millennials especially are deciding between two or more destinations when first deciding to take a trip



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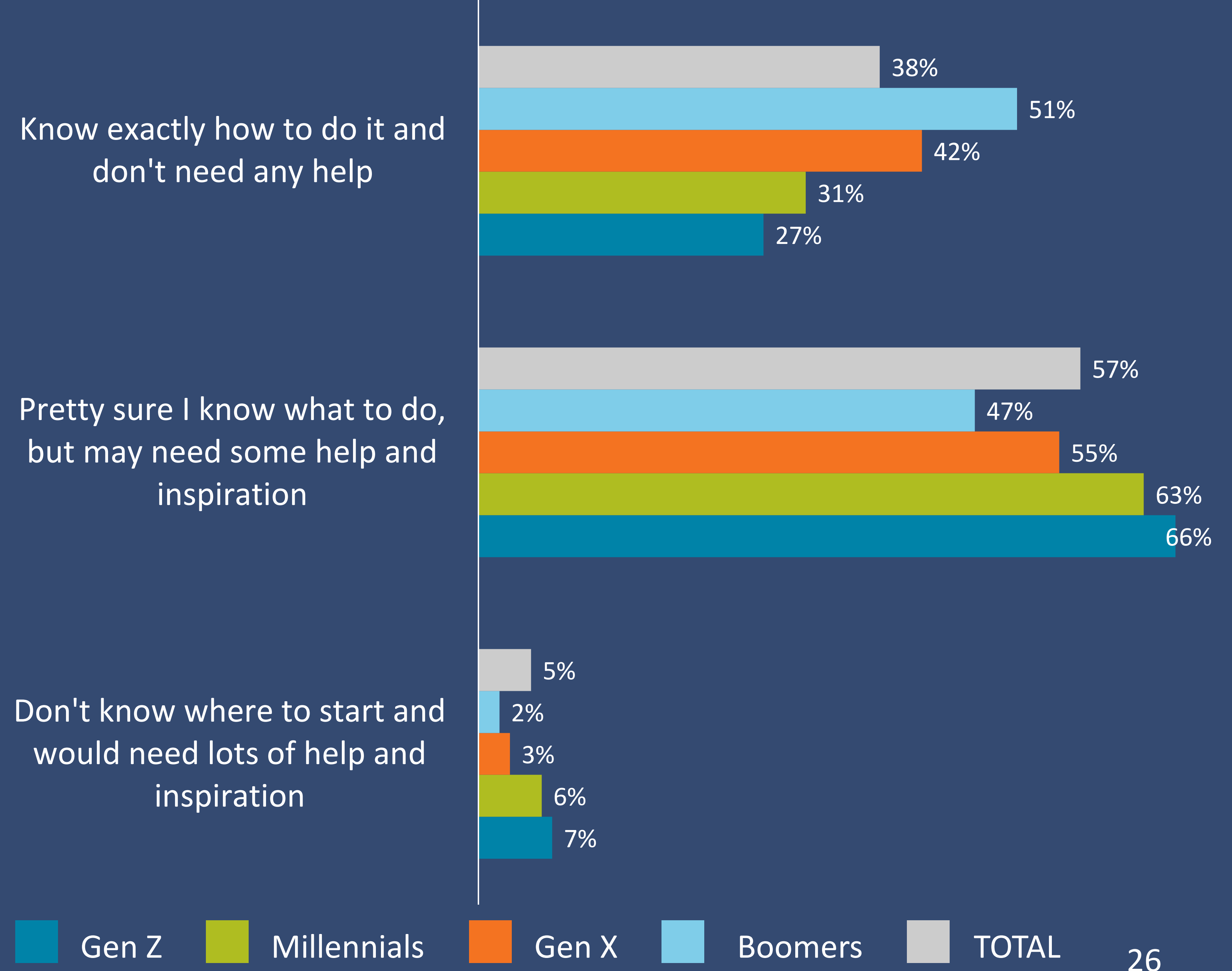
Q23. Which of the following options best describes the way you feel when you first decide to take a trip? (Please select one)
Total (n=3003) Gen Z (n=662) Millennials (n=773) Gen X (n=794) Boomers (n=774)

YOUNGER GENERATIONS **OPEN TO DESTINATION INSPIRATION**

More than half of Boomers think they know where to go and how to get there, while younger generations looking for ideas



Q24. Which of the following options best describes the way you feel when you **first start planning** a trip/holiday?
Total (n=3003) Gen Z (n=662) Millennials (n=773) Gen X (n=794) Boomers (n=774)

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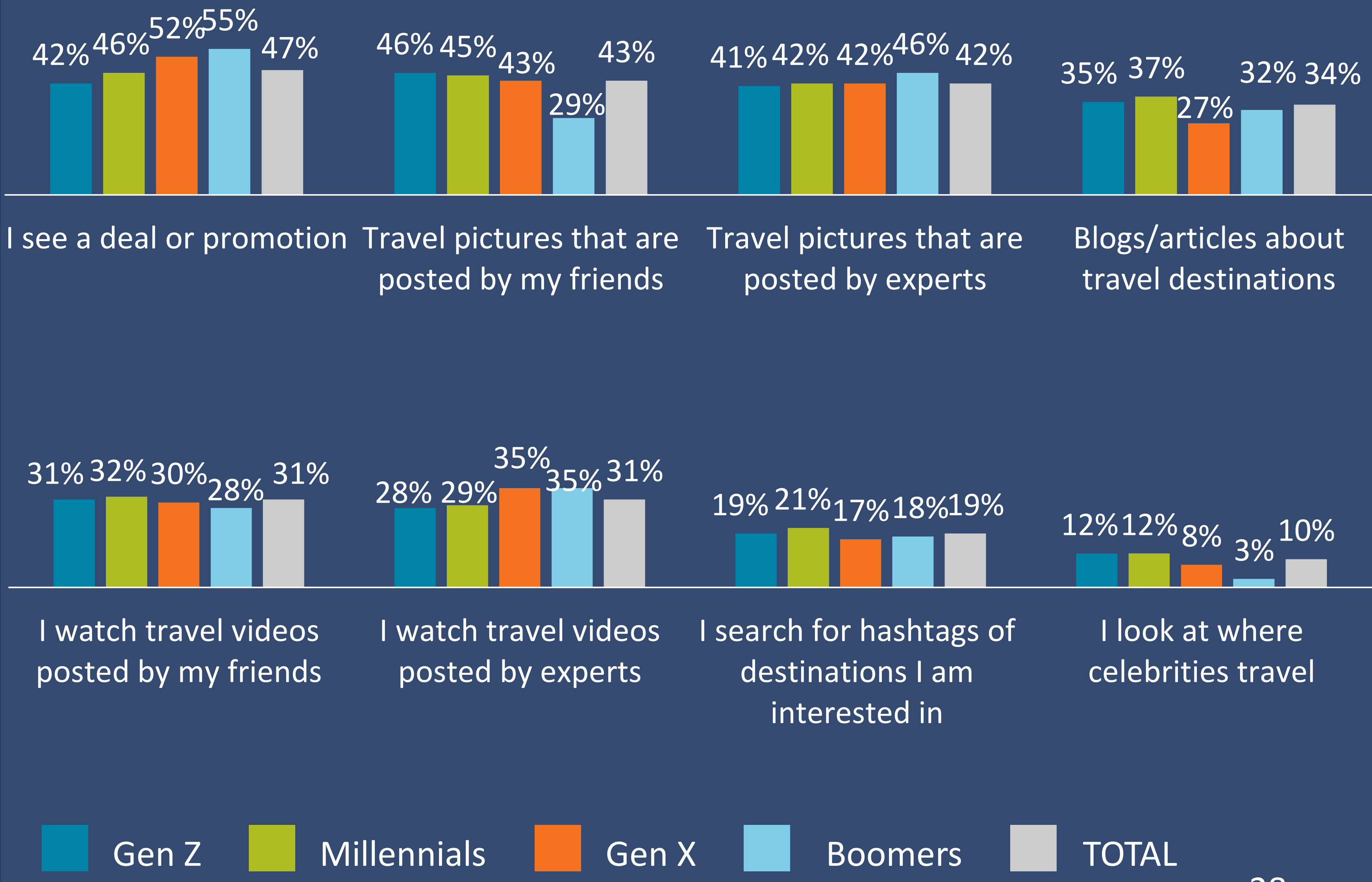
INFLUENCERS AND KEY CONNECTION POINTS FOR EUROPEAN TRAVELLERS

TRAVEL PICTURES BY FRIENDS ON SOCIAL MEDIA INFLUENTIAL TO YOUNGER GENERATIONS

Deals on social media can be more influential to Gen X and Boomers



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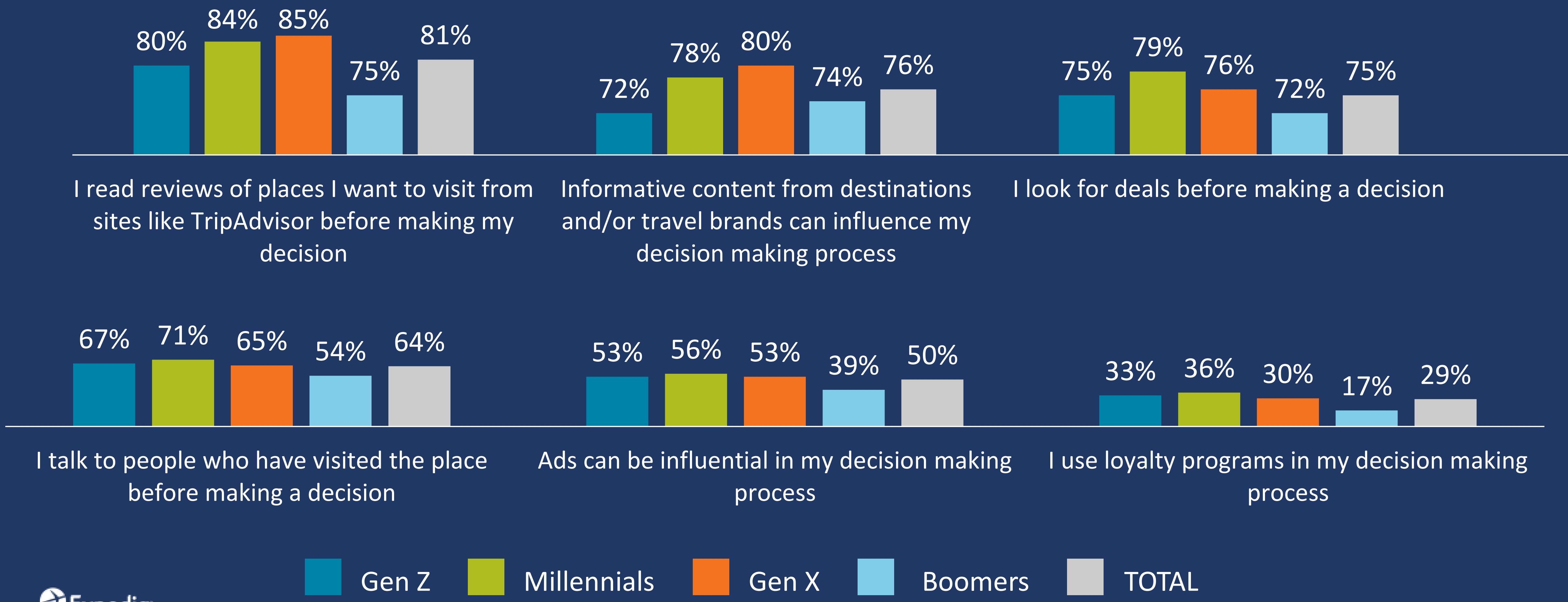
Q29. How does social media influence you? Which of the following influence your decision in booking a trip?
Total (n=3003) Gen Z (n=662) Millennials (n=773) Gen X (n=794) Boomers (n=774)

REVIEWS & CONTENT INFLUENTIAL FOR GEN X

Closely followed by Millennials and Gen Z, who also look for deals and talk to fellow travellers



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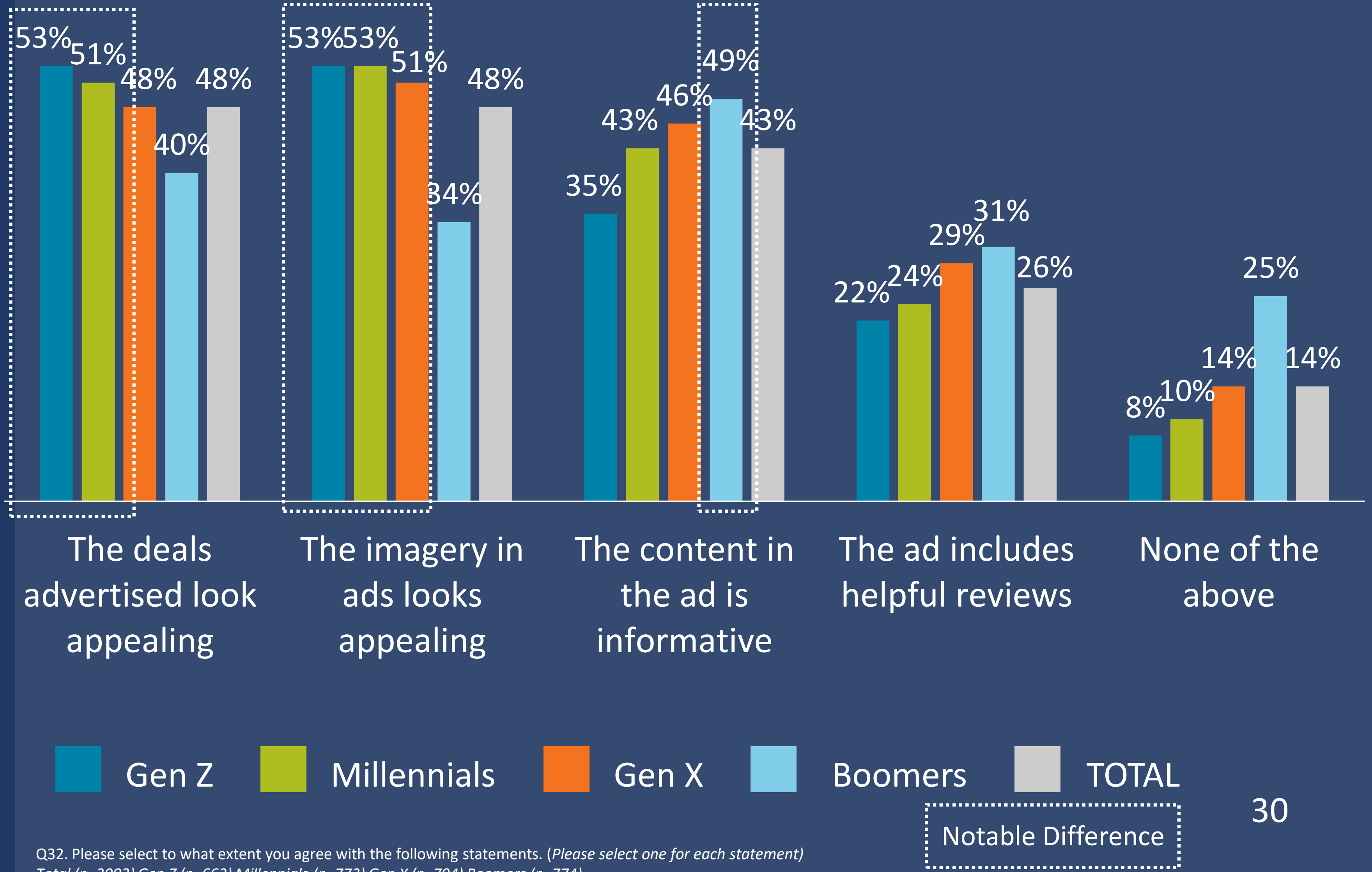
Q32. Please select to what extent you agree with the following statements. (*Please select one for each statement)*
Total (n=3003) Gen Z (n=662) Millennials (n=773) Gen X (n=794) Boomers (n=774)

IMAGERY AND DEALS IN ADS INFLUENCE GEN Z & MILLENNIALS

Closely followed by Gen X, while ads with informative content and reviews speak more to Boomers – if they are influenced at all



Q32. Please select to what extent you agree with the following statements. (*Please select one for each statement*)
Total (n=3003) Gen Z (n=662) Millennials (n=773) Gen X (n=794) Boomers (n=774)

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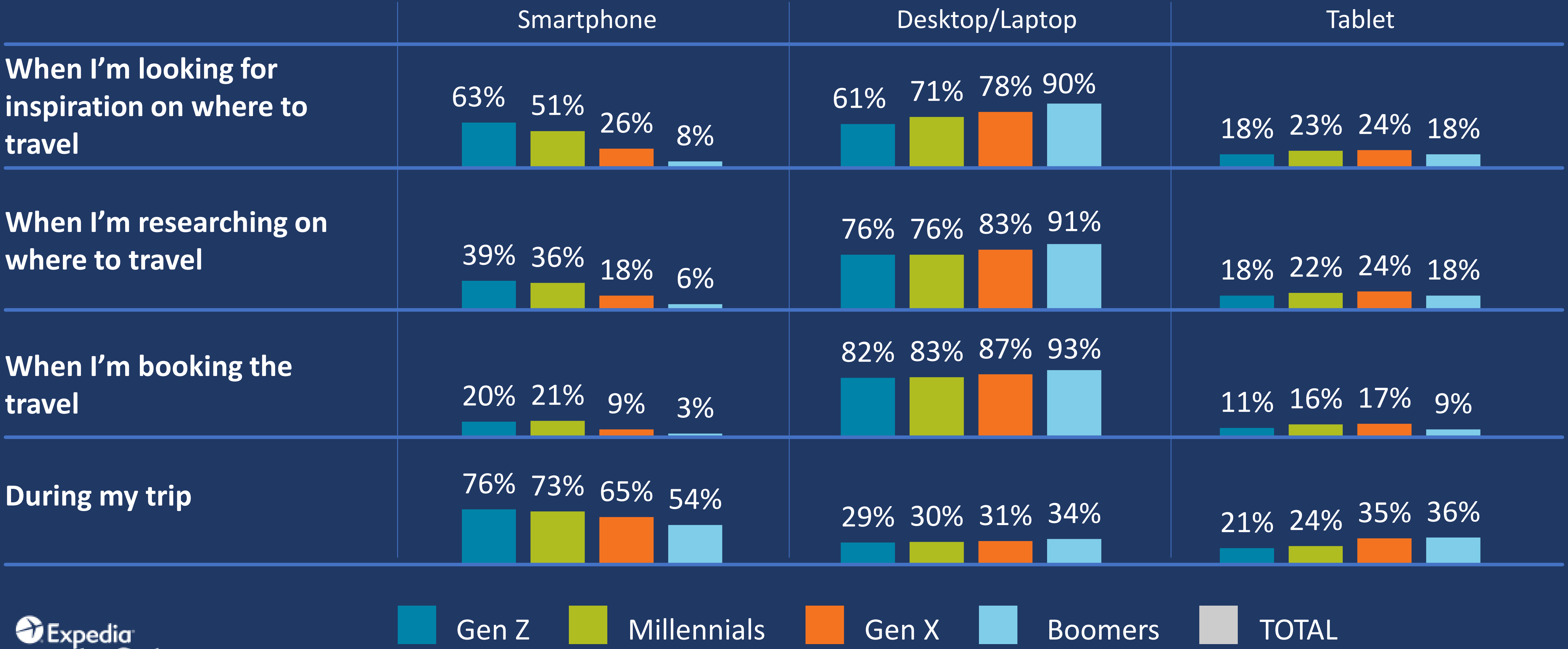
COMPUTERS STILL PROMINENT IN THE PURCHASE PATH

When it comes to travel inspiration before booking and during the trip, Gen Z use their smartphone more than the other generations, followed closely by Millennials



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Q47. For each of the following statements, which device(s) do you use? Please select all that apply.
Total (n=3003) Gen Z (n=662) Millennials (n=773) Gen X (n=794) Boomers (n=774)

KEY INSIGHTS & MARKETING TAKEAWAYS

- Travel imagery is especially impactful to younger generations – whether in social media or online ads

Use compelling imagery when appealing to younger audiences, especially of people who are the same generation

- Budgets, deals and value are necessary considerations for all travellers, but when prioritizing activities and experiences hold more sway

Lead with unique activities and experiences – while providing deals to make the decision even easier

- Younger generations are online and mobile, but computers are still prevalent for all throughout the purchase journey

Create a multi-screen strategy with relevant content for how and at what stage people are using various devices

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