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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

		MULTI-NATIONAL TRAVEL TRENDS NORTHSTAR RESEARCH 11 COUNTRIES	BLEISURE TRAVELER TRENDS LUTH RESEARCH 5 COUNTRIES
 GENERATION Z		N = 2,491	N = 120
 MILLENNIALS		N = 2,918	N = 1,289
 COUNTRIES		AR, AU, BR, CA, CN, DE, FR, JP, MX, UK, US	CN, IN, DE, UK, US



Generational Ages

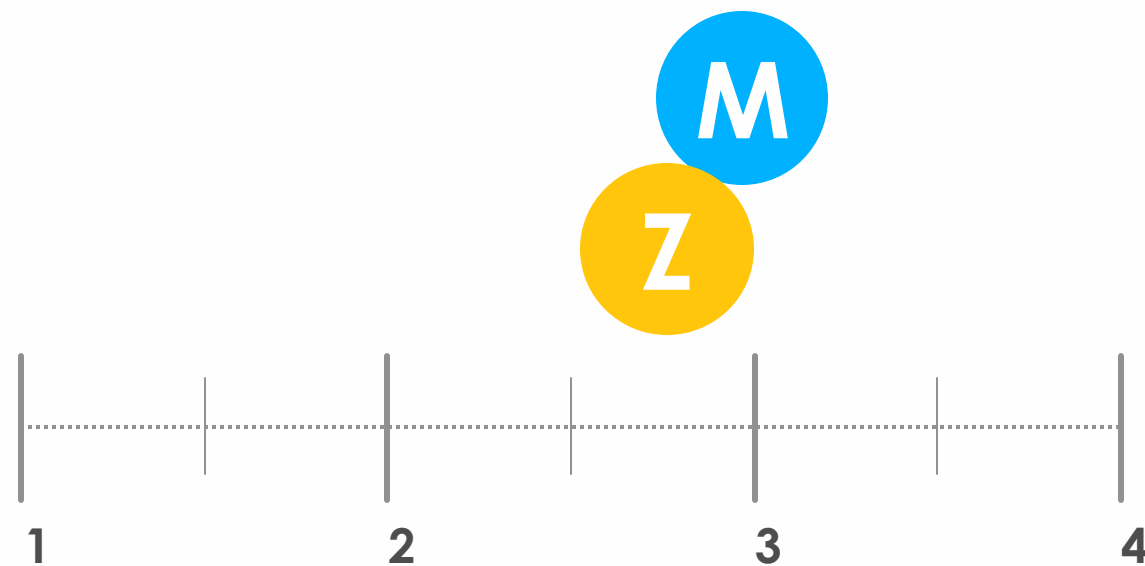
Generation Z = 18-23
Millennials = 24-35

LEISURE TRAVEL

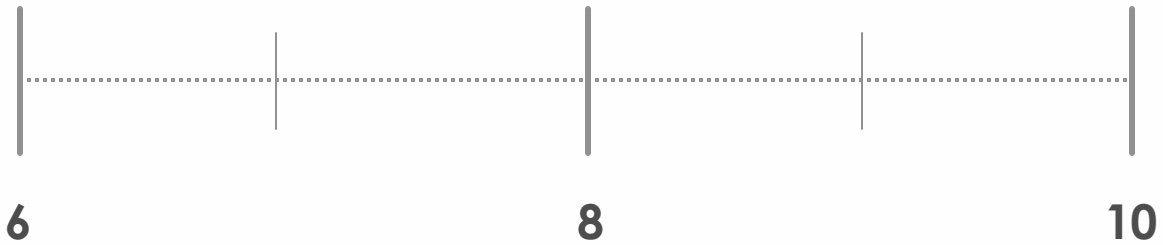
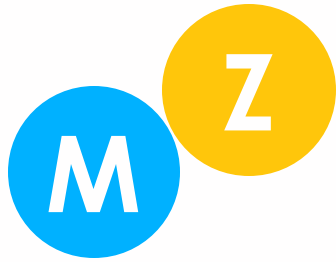




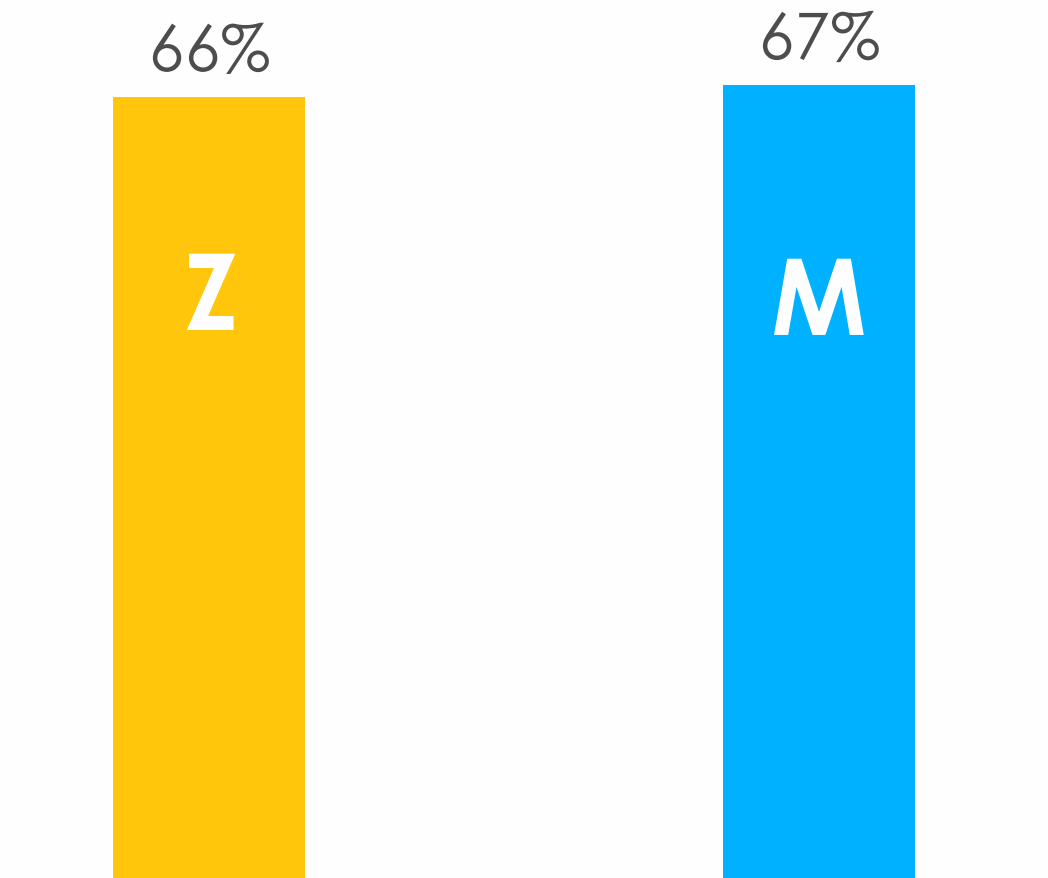
GEN Z ALREADY TAKING ALMOST AS MANY TRIPS AS MILLENNIALS



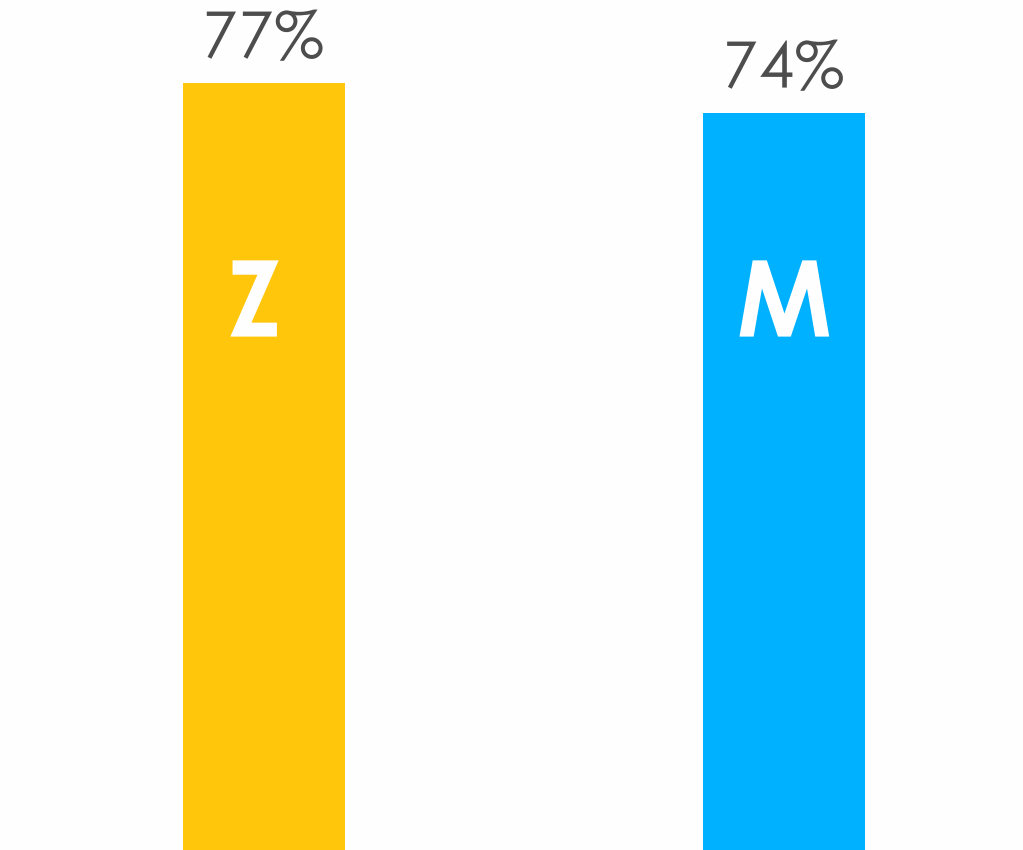
GEN Z TRAVELS RIGHT – TAKING EXTENDED VACATIONS



TWO-THIRDS ARE DESTINATION INDECISIVE

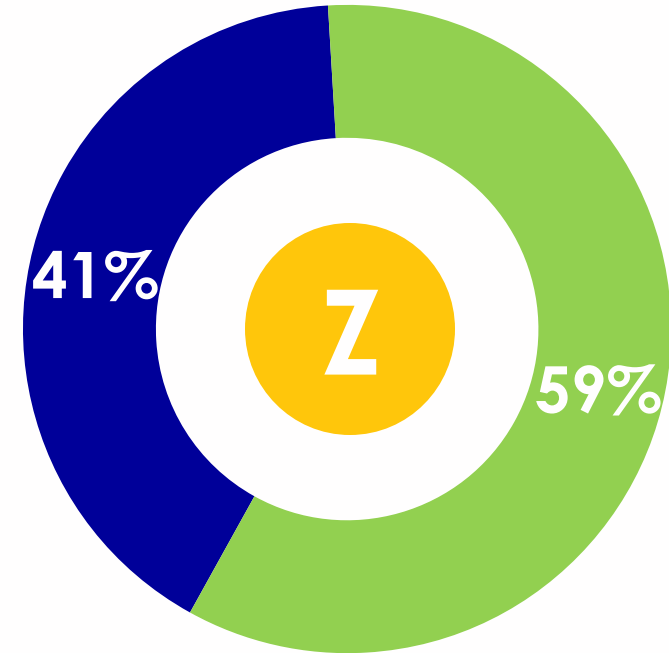


YOUNGER GENERATIONS OPEN TO DESTINATION INSPIRATION



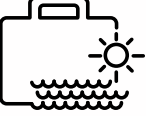










MORE LIKELY TO TRAVEL DOMESTICALLY



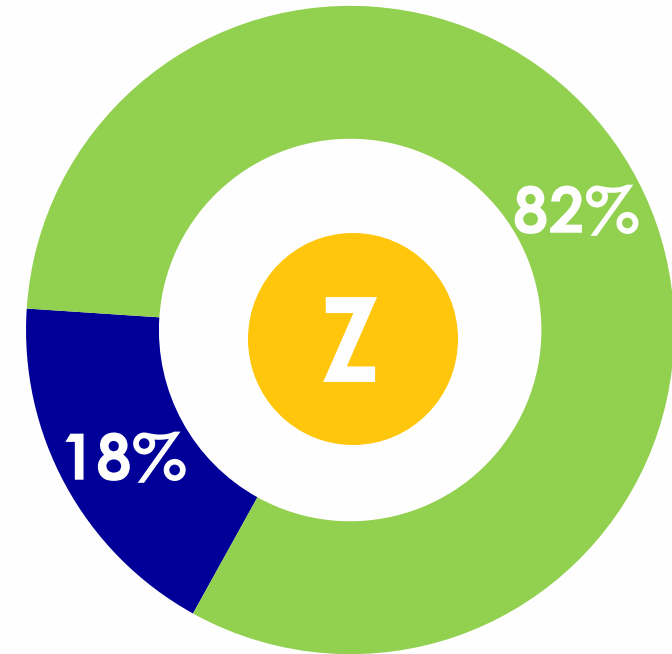
■ International ■ Domestic

RELAXING, SIGHTSEEING & FAMILY VACATIONS RANK HIGH

 RELAXING (Beach, resort, cruise, all-inclusive)	 54%	 57%
 SIGHTSEEING (Museums, landmarks, etc.)	 44%	 45%
 VISITING FAMILY	 42%	 39%








HAVE BUDGET, WILL TRAVEL



■ No

■ Yes

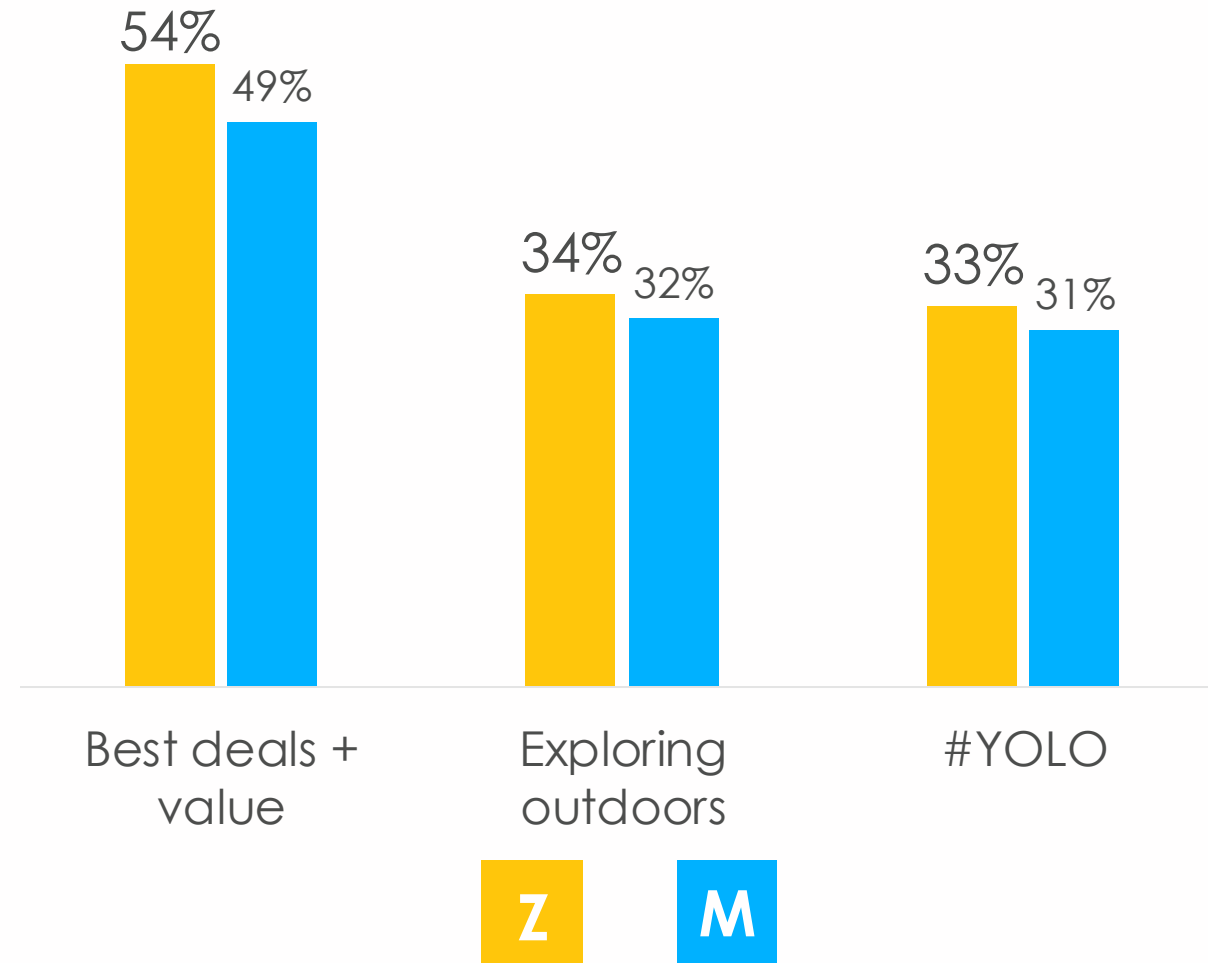
TRAVEL SPENDING ALLOCATION

		Z (%)	M (%)
	HOTEL	22.5	25.6
	FLIGHT	20.2	19.8
	FOOD	16.4	16.2
	TRANSPORTATION	11.4	10.3
	SHOPPING	11.1	10.5
	ATTRACTIONS	11.0	10.6





TRAVEL DEALS & VALUE ARE IMPORTANT



ACTIVITIES & EXPERIENCES GET TO THE HEART OF TRAVEL DECISIONS

Activities I will be doing on my trip

M

Z

A once in a lifetime experience

M

Z

The cultural experience

M

Z

Lowest Price

M

Z

125




150

175

200



FINDING THE FUN

	Z (%)	M (%)
 SPECIAL EVENTS	26	25
 ACTIVITY BASED VACAY	20	20
 PARTY	21	18



CONCERTS,
FESTIVALS,
SPORTING EVENTS

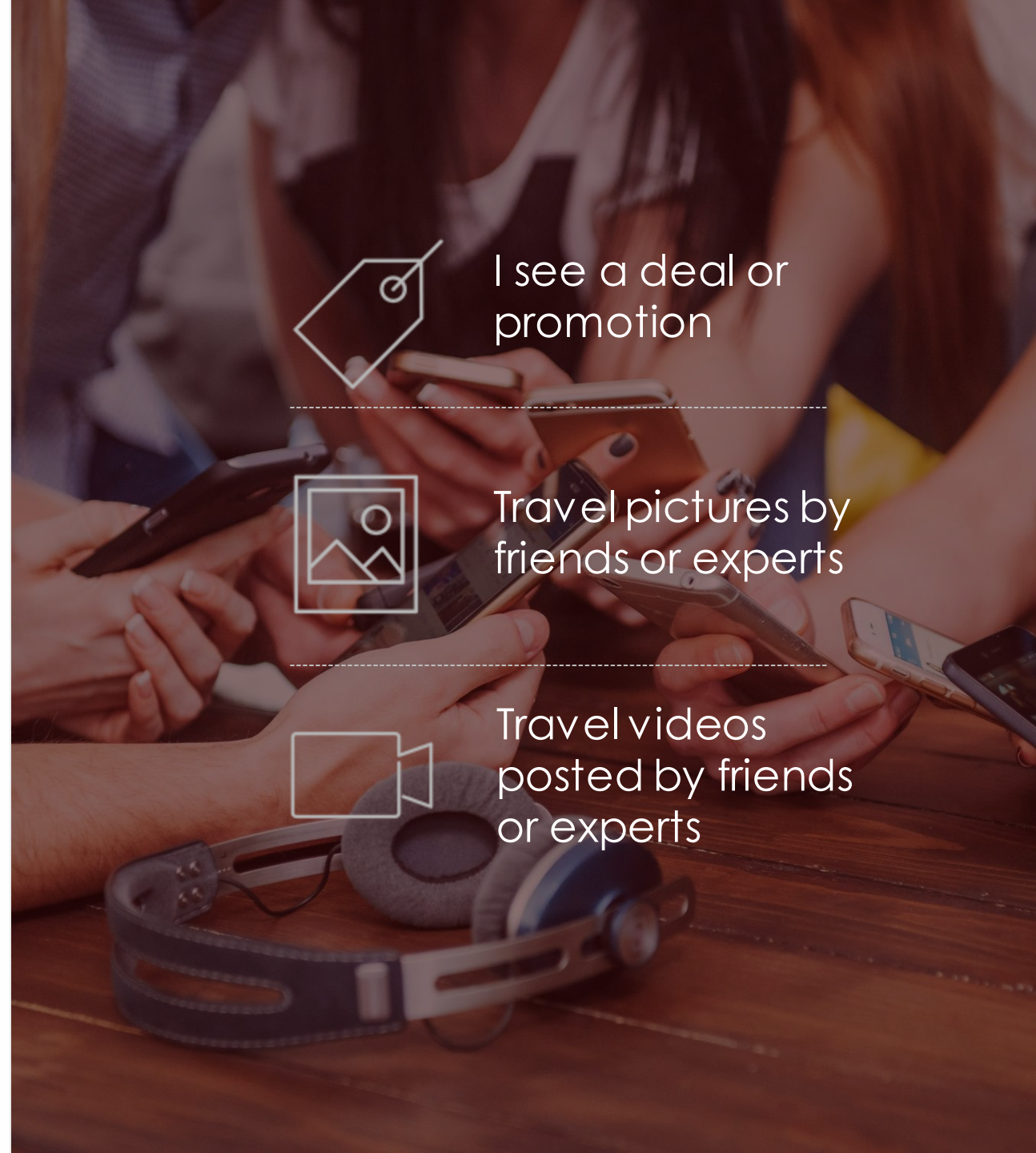
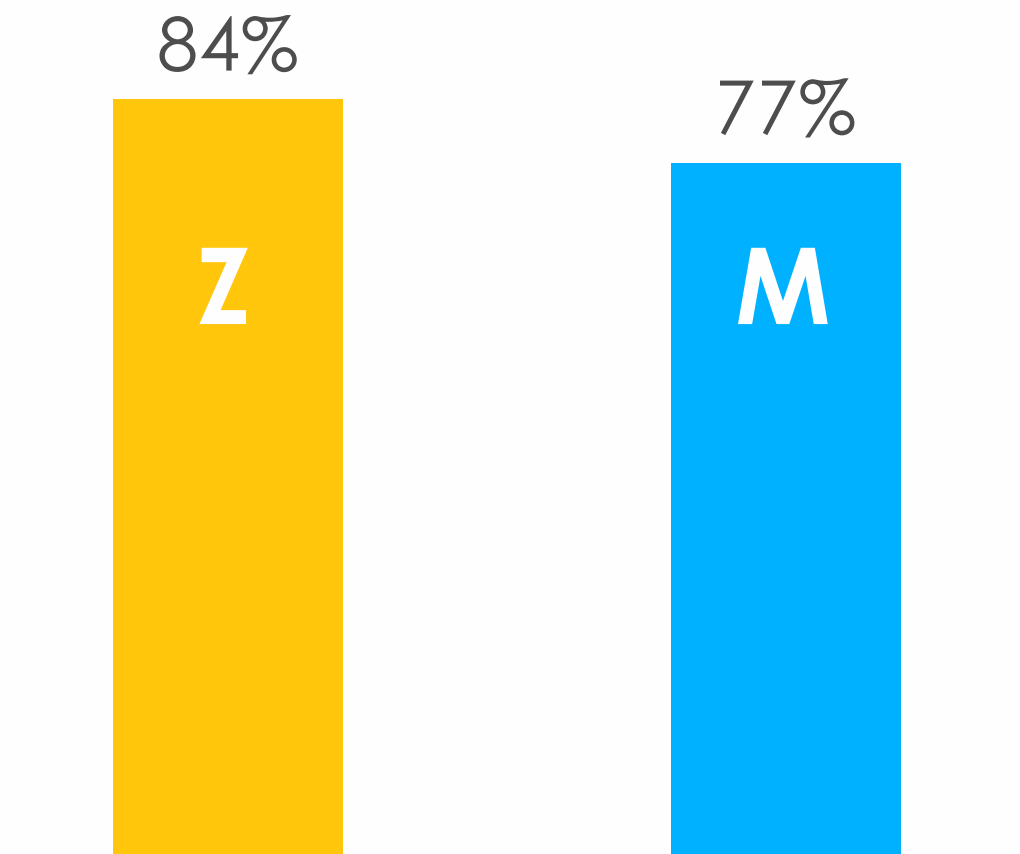


GOLF,
SKIING,
HIKING



BACHELOR,
GIRLS' TRIP

INFLUENCE OF SOCIAL MEDIA



I see a deal or promotion



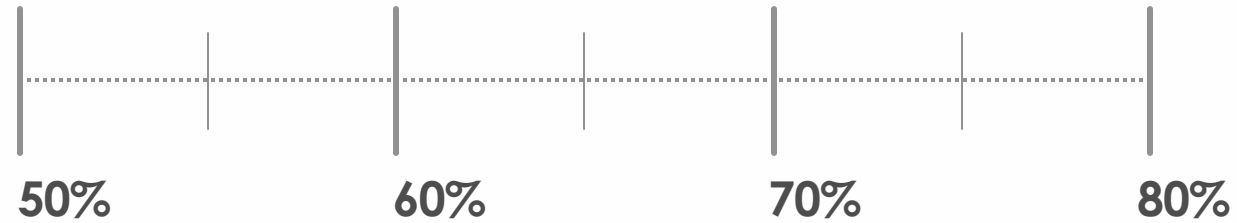
Travel pictures by friends or experts







Travel videos posted by friends or experts



ADS CAN BE INFLUENTIAL



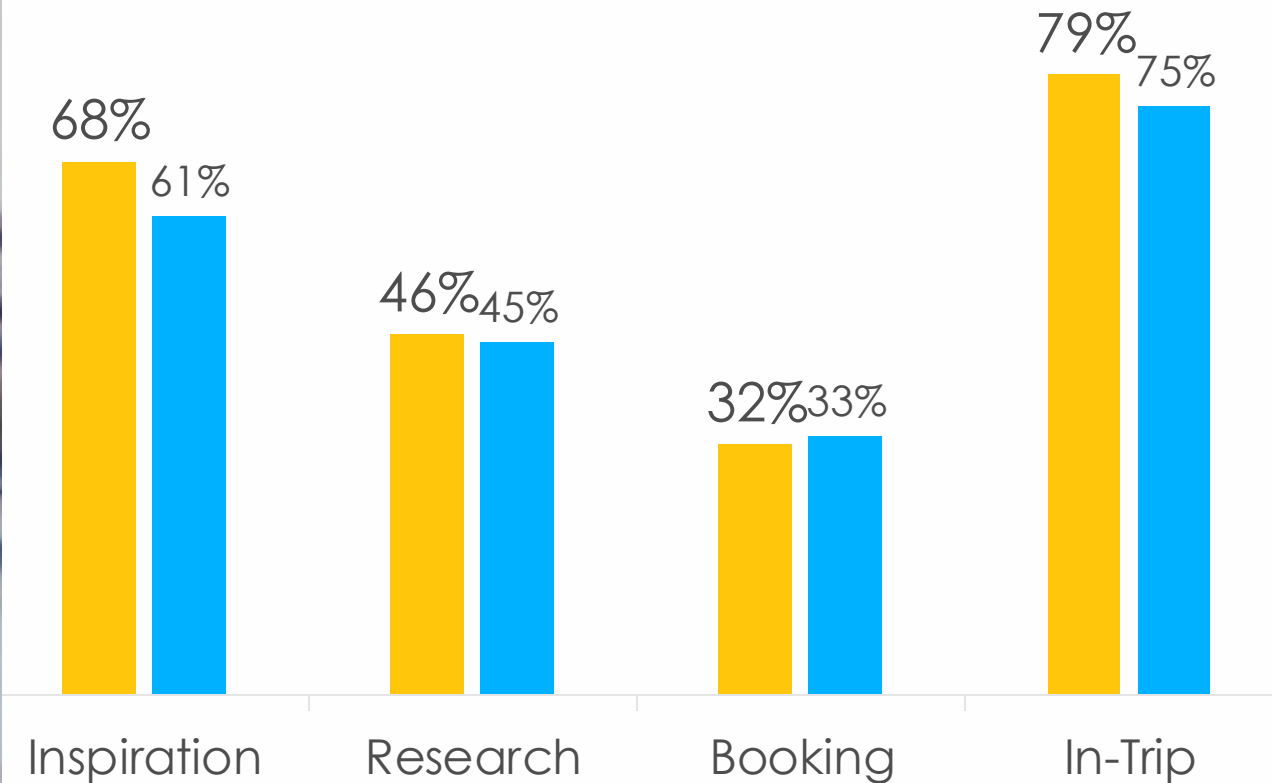
APPEALING DEALS & IMAGERY MOST INFLUENTIAL

		Z (%)	M (%)
	Appealing deals	56	56
	Appealing imagery	53	52
	Informative content	45	46
	Helpful reviews	28	27





SMARTPHONE USAGE HIGH, ESPECIALLY IN INSPIRATION PHASE



BUSINESS + LEISURE
= **BLEISURE TRAVEL**



WATCH OUT WORLD – GEN Z ARE BEGINNING TO TRAVEL FOR WORK

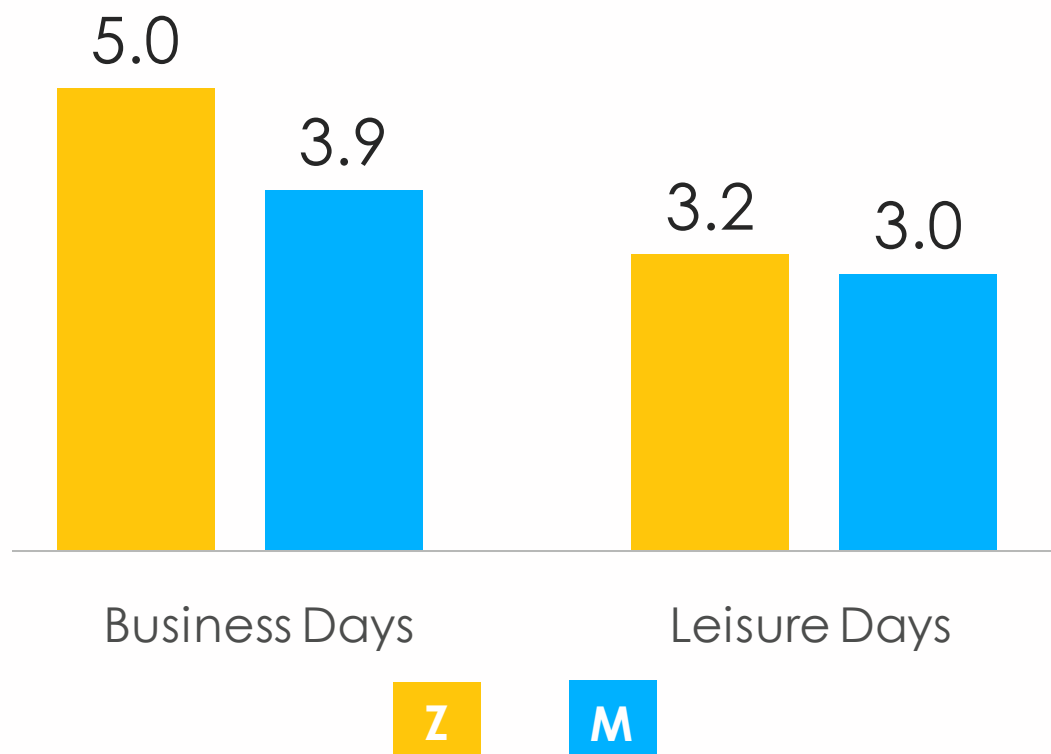




WHEN GIVEN THE CHANCE, GEN Z ARE BIG ON BLEISURE

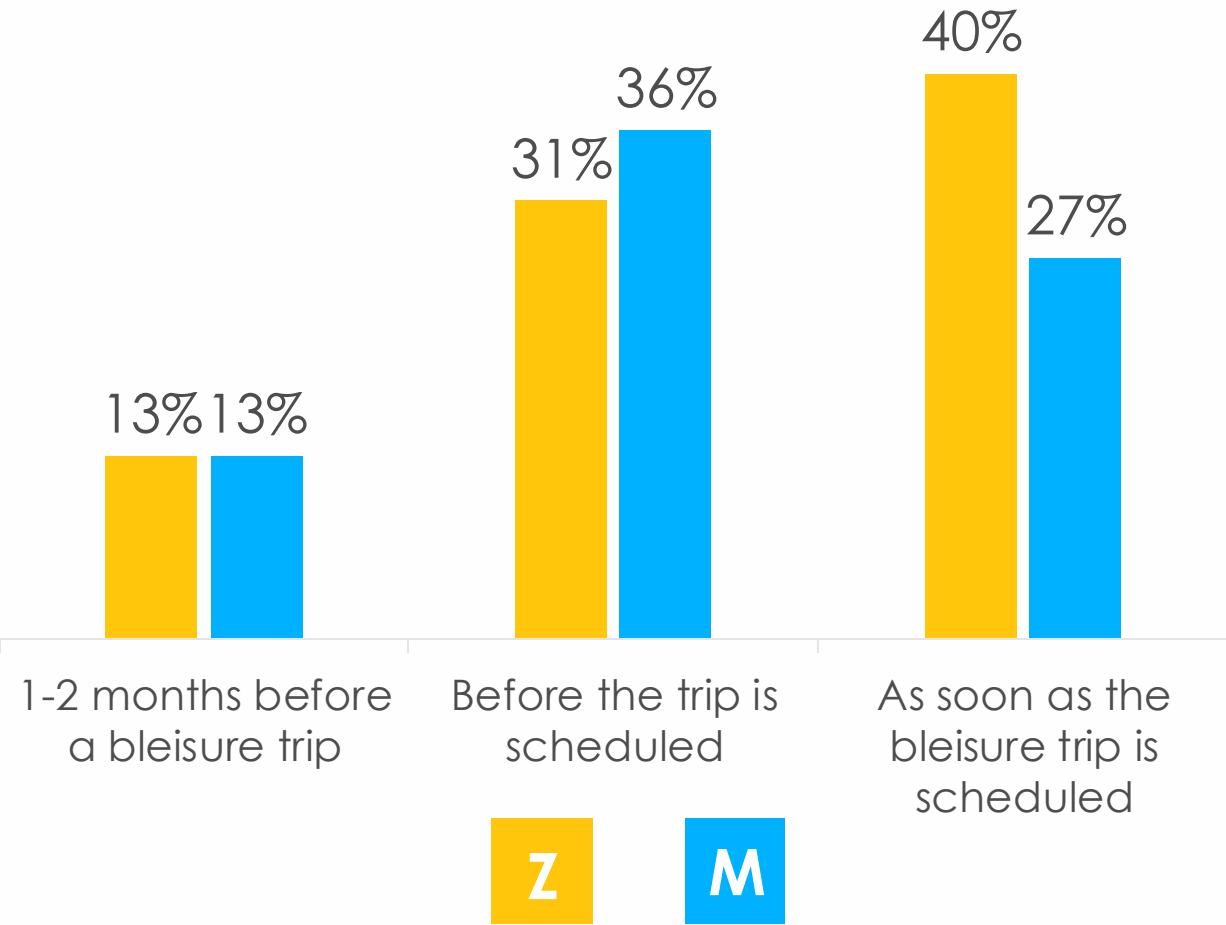
Z (%)	M (%)
66	61

LENGTH OF TRIP CAN NEARLY DOUBLE BY ADDING LEISURE

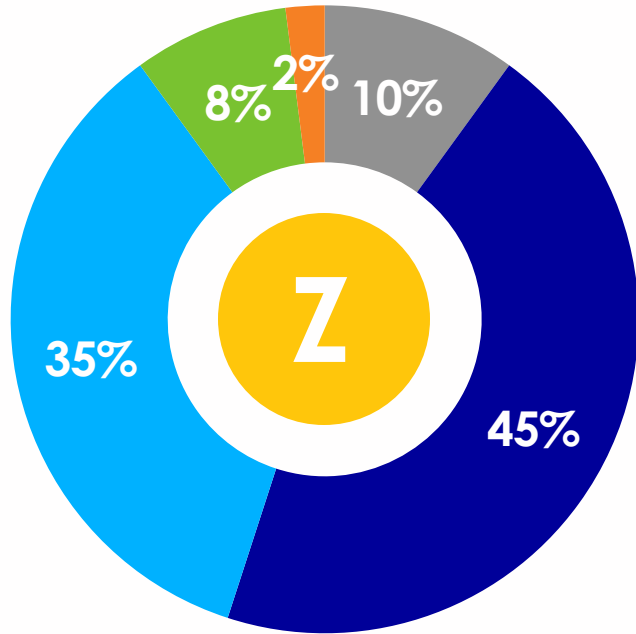




SAVING FOR BLEISURE STARTS EARLY



CONDENSED RESEARCH & DECISION WINDOW

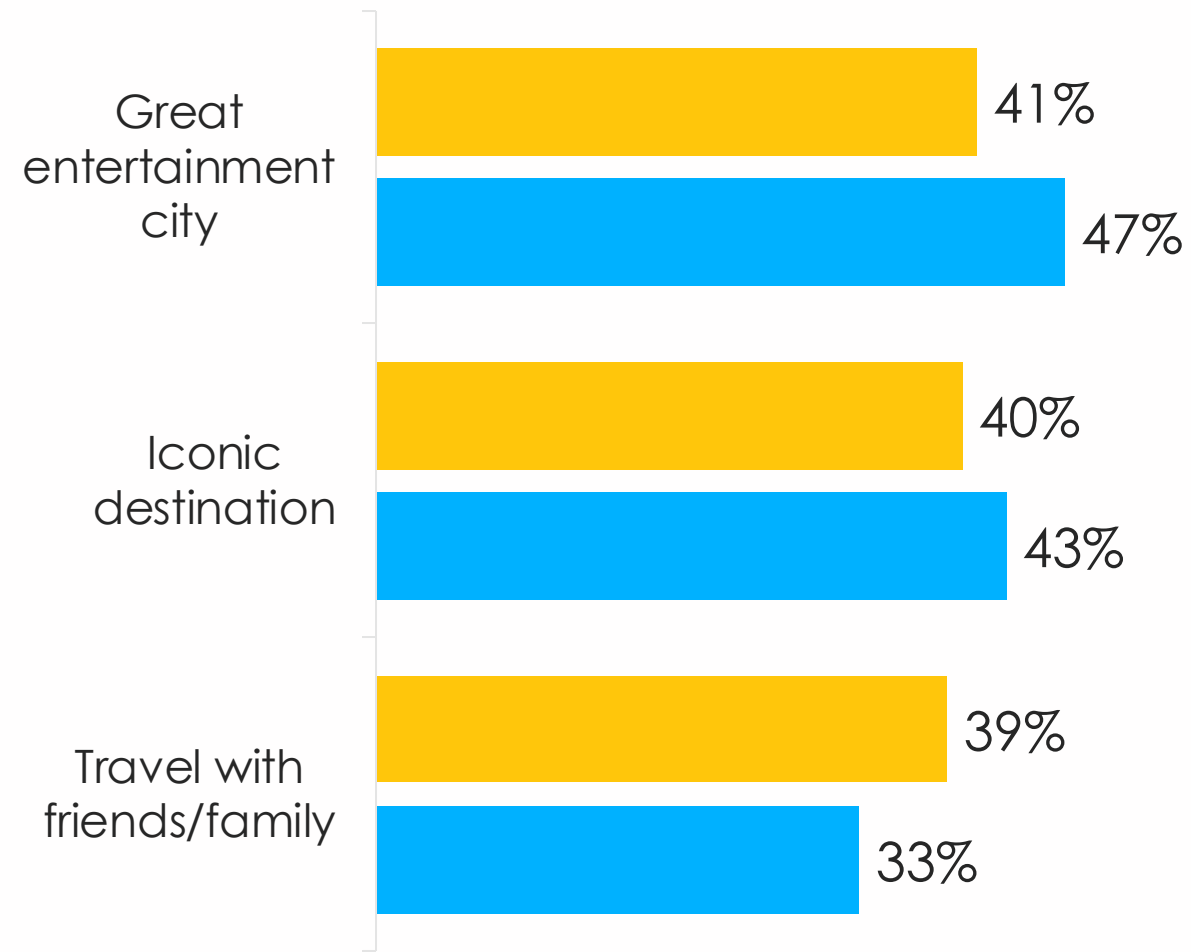


■ Almost None ■ 1-2 hours ■ 3-5 hours
■ 6-10 hours ■ 10+ hours

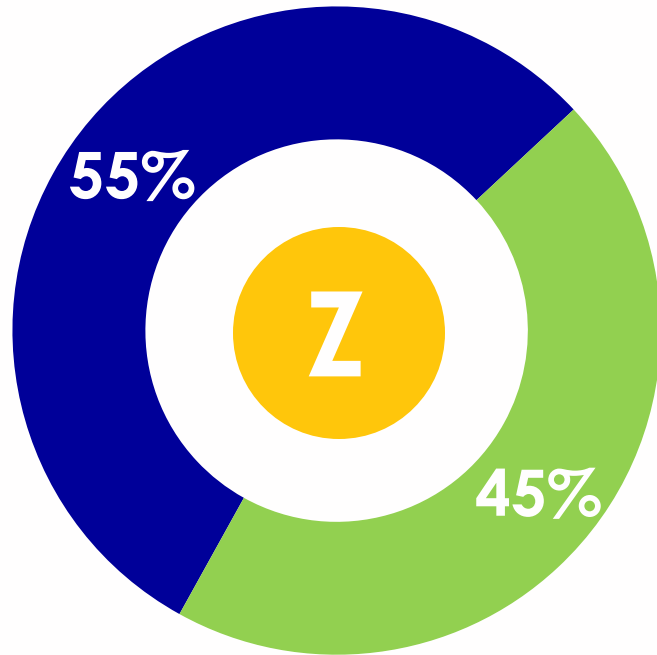




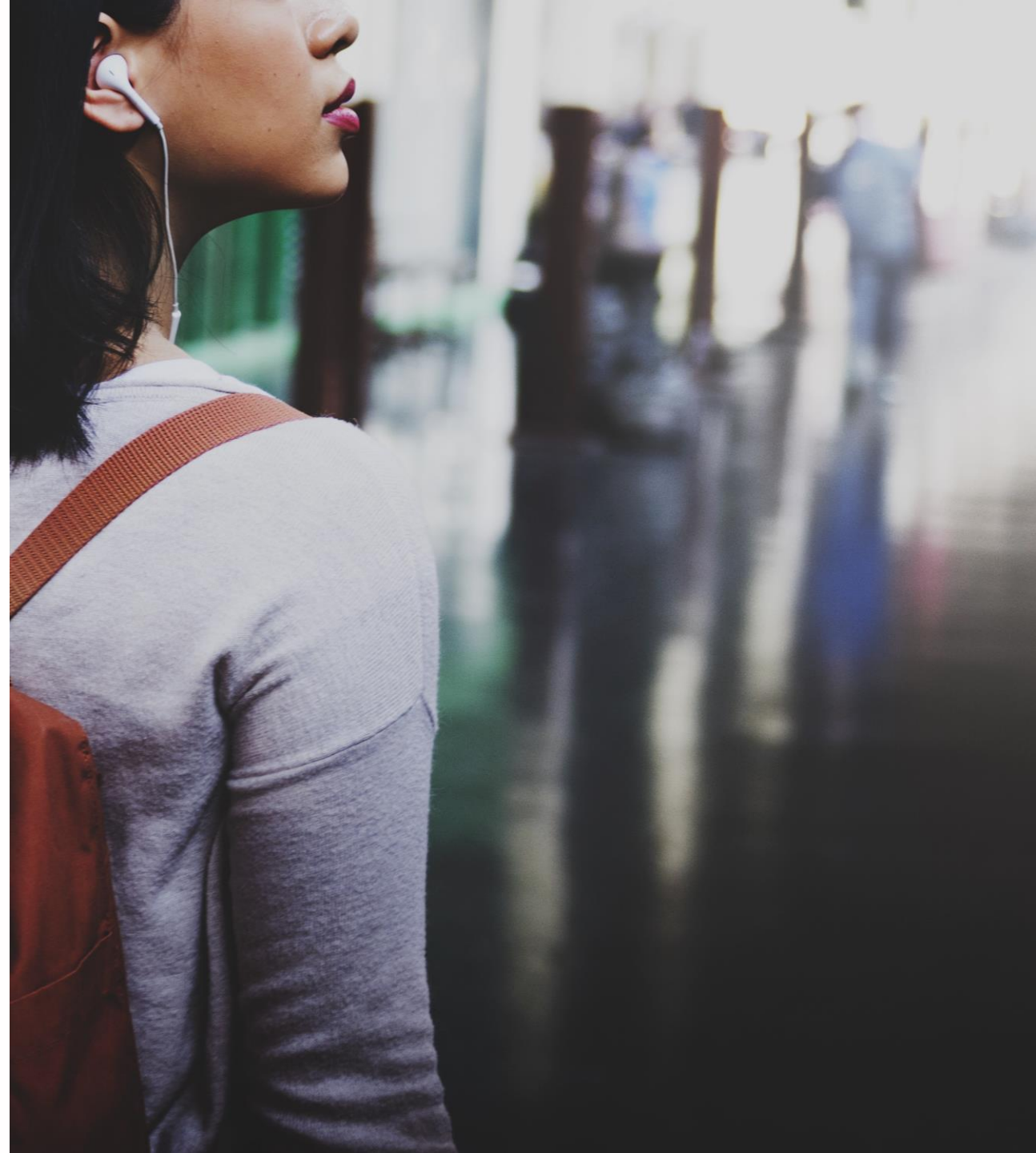
FACTORS FOR DECIDING TO BLEISURE



GEN Z ARE SPLIT ON STAYING PUT OR EXPLORING FOR BLEISURE

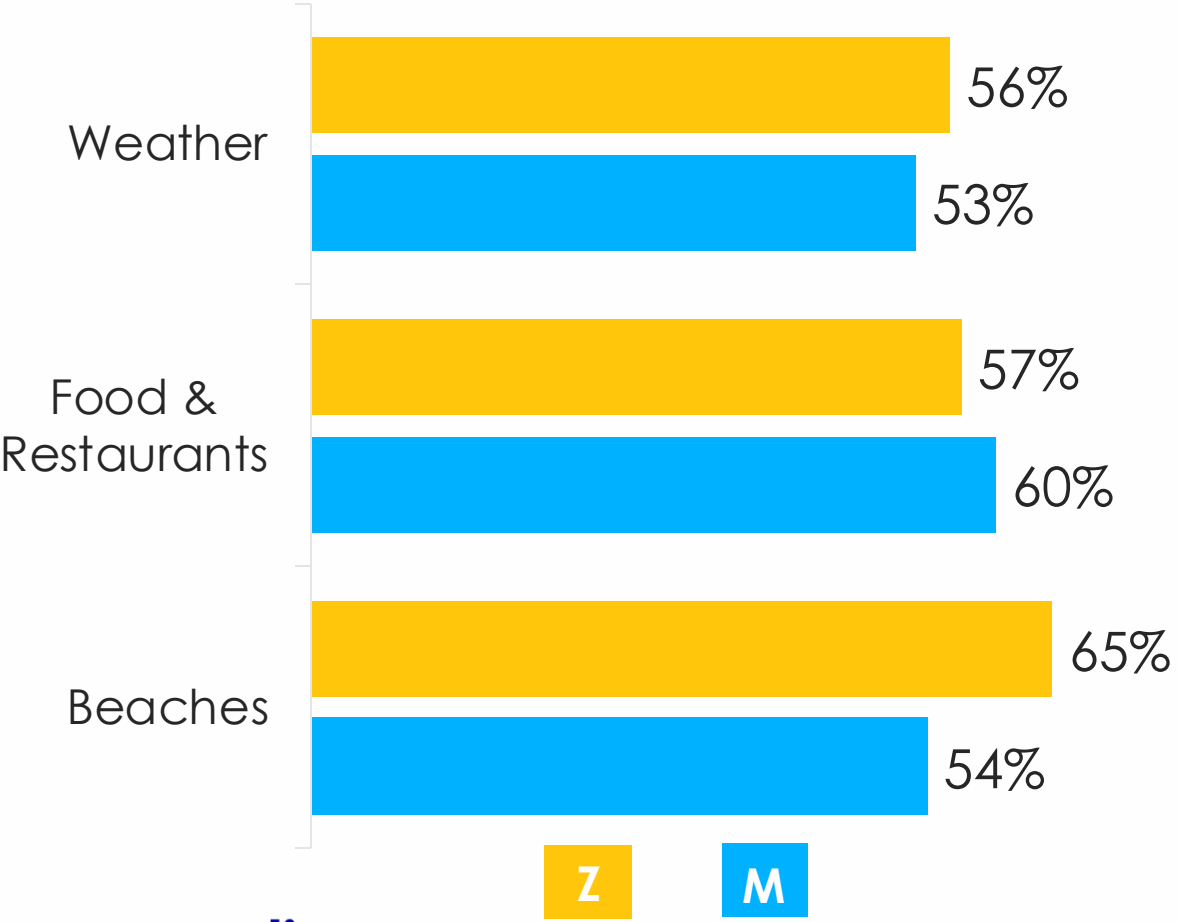


■ Same Place ■ Different Place





GEN Z DRAWN TO EXPERIENCES – ESPECIALLY BY THE BEACH



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

