

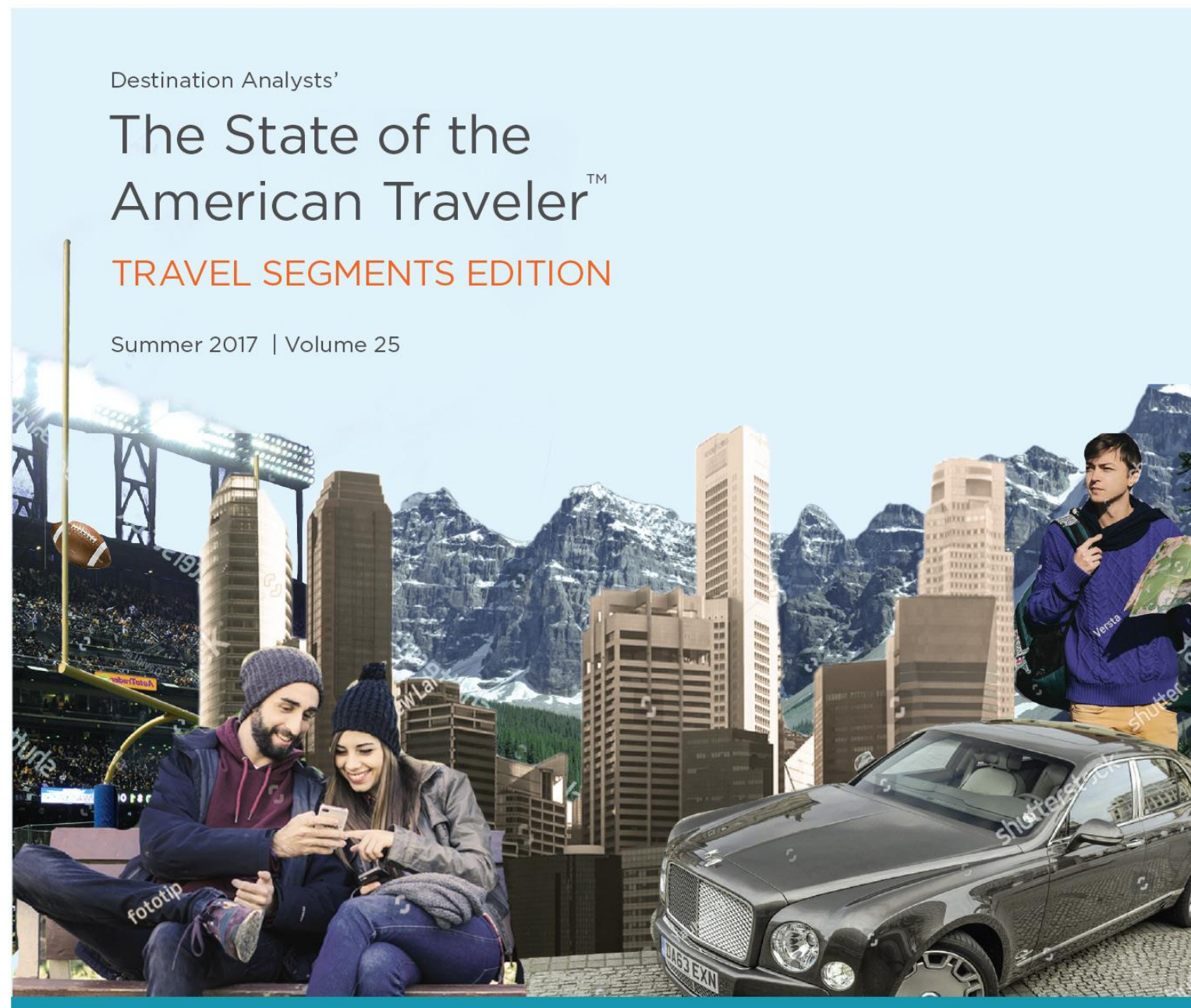
The background of the slide is a blurred photograph of a person with long brown hair, seen from behind, looking down at a map. The setting appears to be an outdoor urban area with buildings and trees in the background. A dark blue semi-transparent banner is overlaid across the middle of the image, containing the main title and logo.

# Traveler Segments: Their Sentiments, Interests and Behaviors

Destination  Analysts



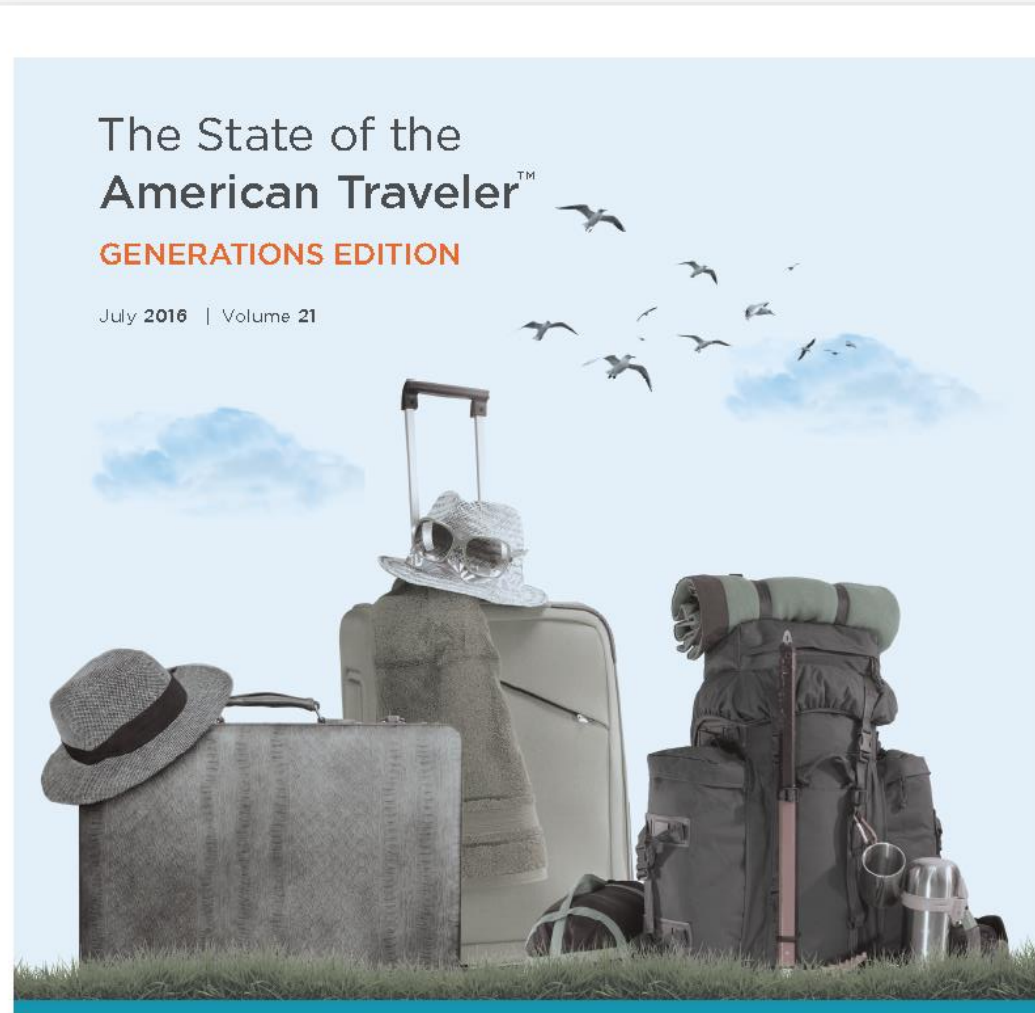
# The State of the American Traveler



Destination  Analysts

- Online survey conducted since 2006
- Conducted quarterly
- Survey invitation sent to a nationally representative sample of US adults
- Total sample of 2,000+ American leisure travelers
- Examines traveler sentiment, motivations & behaviors





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#### The Generations Edition

THIS SUMMER EDITION of The State of the American Traveler™ explores issues related to differences in how the generations travel. We begin with a look at how American travelers are feeling about the near-term future, and show how much of the existing optimism is driven by the high-spirited Millennial generation. The report also examines the psychographic make-up of the generations, as well as their use of technology in travel planning.

OUT OF THIS RESEARCH was also born our for Marketing to the Generations, which highlights which these insights can shape your strategies as travel marketing more effective. Please enjoy. As always, if you have questions or ideas for future topics, we welcome you to message us: info@destinationanalysts.com or @DA\_Research.



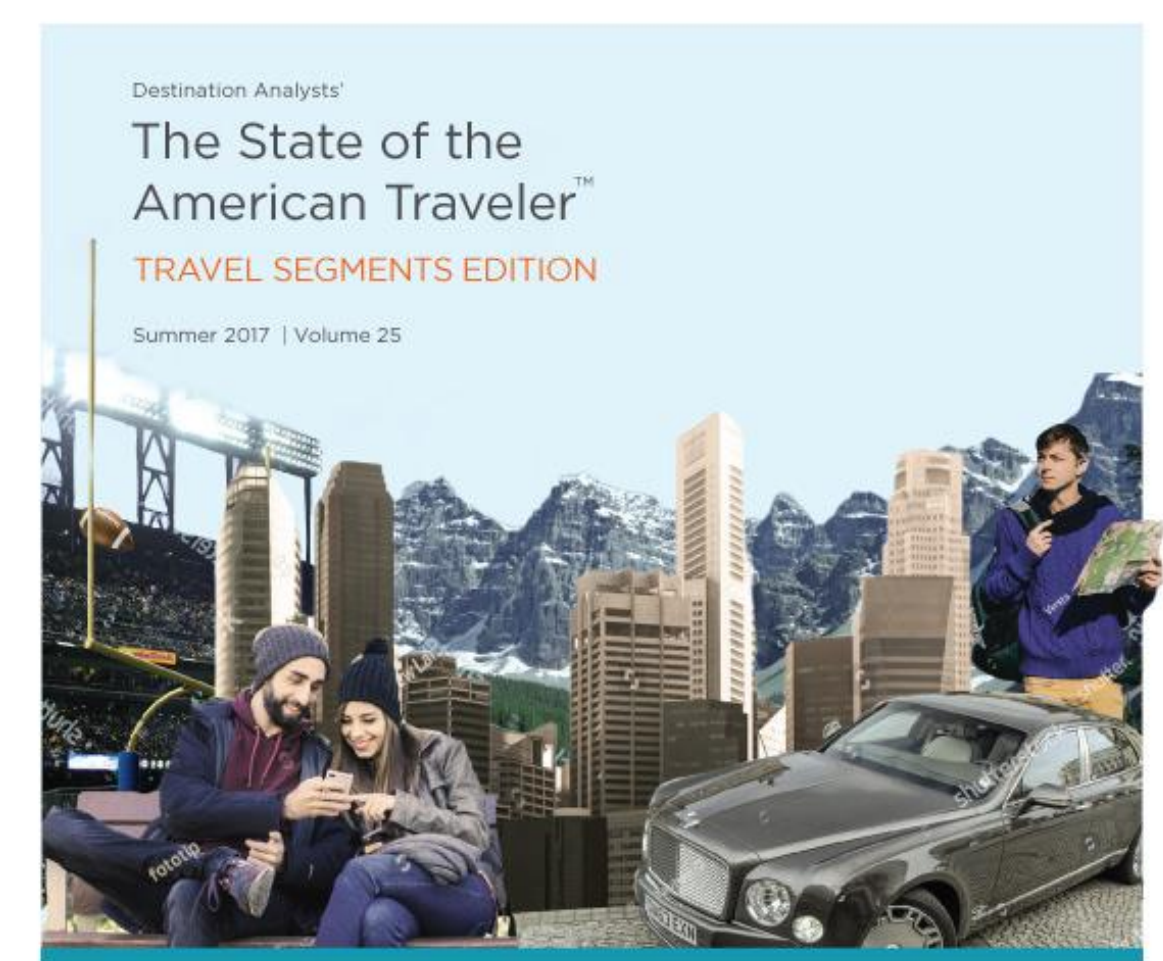
Destination  Analysts

#### The Destinations Edition

THIS EDITION of The State of the American Traveler™ explores contemporary travelers' relationships with destinations. As always, we begin with a look at the current leisure travel landscape, which is marked by considerable current optimism for future travel and travel spending. Americans are not only expecting to consume more travel product, they are feeling less constrained by factors such as personal finances and travel costs. This edition, in addition to exploring travel content used to make destination decisions,

looks at the types of destinations that travelers explore in the near-term, shows continued strong and urban escapes, with year for visiting nations. you have questions or ideas for future topics, we welcome you to message us: info@destinationanalysts.com or @DA\_Research.

info@destinationanalysts.com



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#### The Travel Segments Edition

THIS SPRING EDITION of The State of the American Traveler™ looks at travel segments. Destination marketers always seem to be on the hunt for the latest and great group of high-value travelers to lure to their destination. In this edition we look at six different high profile segments, and present some descriptive data to illustrate of they act, think and plan their leisure travels. For each segment, we present mostly data points where the segments differ markedly from their counterparts.

Segments examined in this edition include: Destination Marketing Organization (DMO) Content Users, Affluent Travelers, Sporting Event Travelers, Millennials, Festival & Special Event Travelers, Special Event & Festival travelers. We end with a fun look at how the genders differ. Please enjoy. As always, if you have questions or ideas for future survey topics, we welcome you to message us: info@destinationanalysts.com or @DA\_Research.

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#### The Mobile Edition

THIS FALL EDITION of The State of the American Traveler™ explores travelers' use of mobile devices in planning and executing their trips. As always, we start with an examination of how American travelers are feeling about the near-term future, and the story continues to be very positive. Travelers are currently showing record levels of optimism for travel in the next year. In this issue we also introduce our Mobile Addiction Test, which shows that over the past two years, leisure travelers have

grown increasingly attached to these highly engaging devices. Despite this increasing dependence, travelers still heavily rely on (and actually prefer) more traditional laptop or desktop devices for their travel planning needs. Please enjoy this edition. As always, if you have questions or ideas for future survey topics, we welcome you to message us.

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#### The Technology Edition

THIS SPRING EDITION of The State of the American Traveler™ looks at technology and how travelers use it to dream about, plan and execute their trips. As always, first we look at the current leisure travel landscape, which is marked by considerable optimism for future travel and travel spending. In fact, leisure travel optimism is at a record high, mirroring positive trends seen in more general consumer confidence

indices. The report then dives into word-of-mouth, and its relationship to the many other resources used in travel planning. From there, we examine technologies and how they are being used and adopted for travel. Please enjoy. As always, if you have questions or ideas for future survey topics, we welcome you to message us: info@destinationanalysts.com or @DA\_Research.

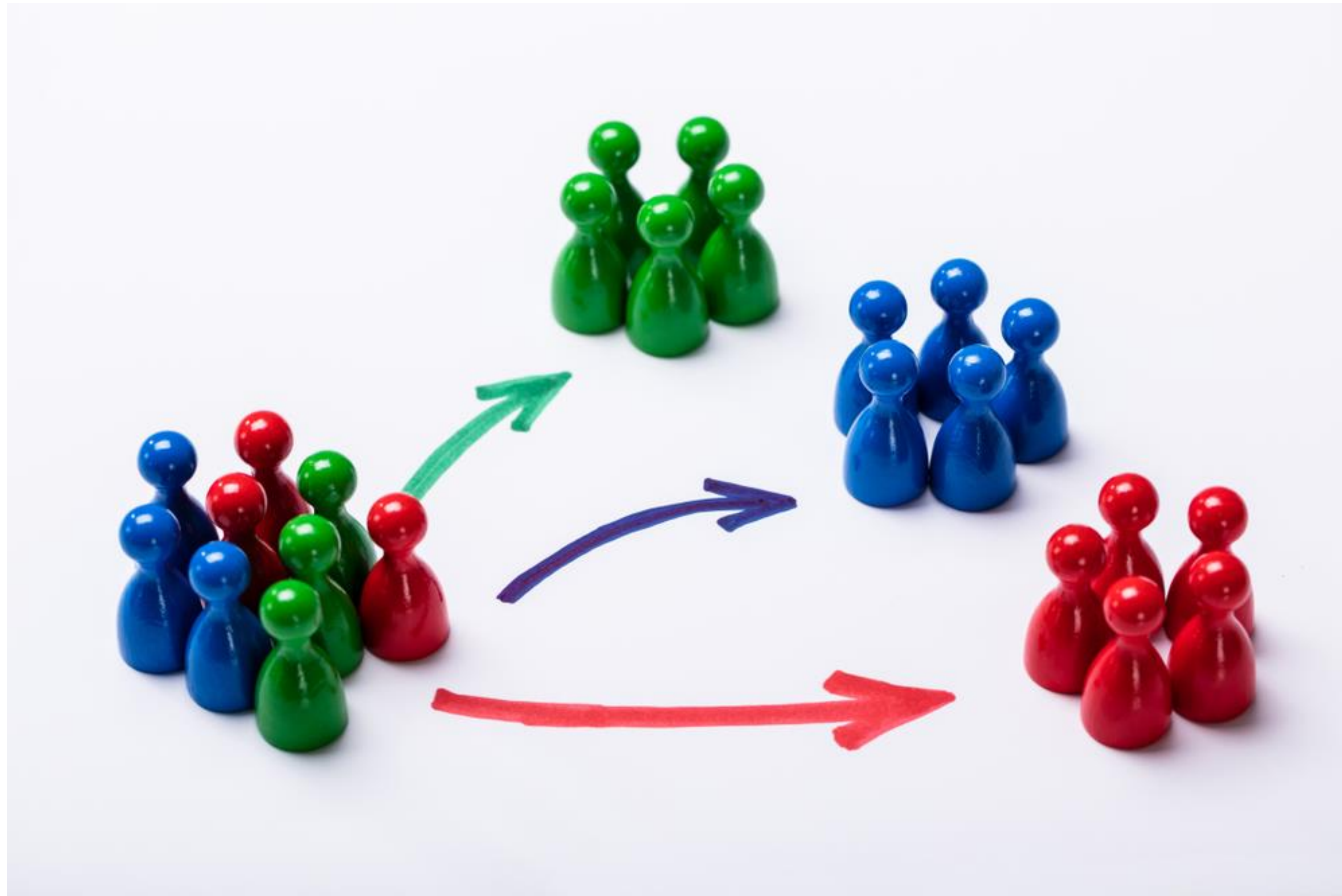
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# Traveler Segments







## Generation Z

Travelers between 15 and 23 years of age



## National Parks Travelers

Travelers who have visited a National Park on a leisure trip in the past 12 Months



## International Travelers

Travelers who have ventured abroad for leisure in the past 12 months



## Family Travelers

Travelers who have taken their own children with them on a leisure trip in the past 12 months





## Print Resource Users

Travelers who have used any printed travel planning resource in the past 12 months



## Social Media-Influenced Travelers

Travelers who visited a place because social media content influenced them to do so



## Bleisure Travelers

Travelers who have extended a business trip for leisure



# Generation Z

Travelers between 15 and 23 years of age

# 13.9%

of traveling adult Americans\*

\* Data presented here includes an oversample which allows us to include travelers 15-17 years of age.



BUSINESS INSIDER

TECH

FINANCE

POLITICS

STRATEGY

LIFE

INTELLIGENCE

ALL

# Meet Generation Z, the 'millennials on steroids' who could lead the charge for change in the US

Libby Kane

Dec. 4, 2017, 10:08 AM

f


t

...


• Generation Z is the youngest American generation.

• In many ways, it reflects and amplifies the millennial generation that came before it.

• It's the most diverse and inclusive generation yet.



Ad



Increase Tourism in Your City - Buxton Can Help

Generation Z is up next.

Gen Z was born between 1998 and 2016, meaning the oldest members are just 19.

That means they're the teenagers entering college, soon to join the workforce and spark their own round of why-young-people-are-the-worst think pieces on the internet.

But who are they, really? What can we expect from them? [A new report](#) from boutique research firm [747 insights](#) , in partnership with consumer research platform [Collaborata](#) , sheds some light on the up-and-coming generation.

The study, called "[Generation Nation](#) ," surveyed over 4,000 Americans from their late teens to their early 70s to find out how they feel about everything from work to friendships to brands, and analyzed their responses.

Wharton

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MARKETING

'Millennials on Steroids': Is Your Brand Ready for Generation Z?

Sep 28, 2015

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It is a generational rite: complaining about “kids these days” and their habits and proclivities, grouching about the world they’re growing up in, and romanticizing generations past who were “perfect in every way.” Parents in the 1960s were horrified by their children’s risqué Elvis Presley-style dance moves and loud rock n’ roll (as portrayed in the musical, *Bye Bye Birdie*). When the baby boomers grew up, they derided Generation X as the MTV Generation, a bunch of lazy disaffected slackers. As Gen Xers settle into middle age, they moan about the millennials (or Generation Y): entitled products of helicopter parenting and an ‘everybody-gets-a-trophy’ ethos.

And now here comes Generation Z, the post-millennials loosely defined as those born between the mid- to late-1990s and 2010. Gen Z, which represents about a quarter of the U.S. population, is coming of age in the Era of Instagram; coming of age post-the Great Recession, and coming of age when an African American president and multiple women running for the title is a political reality. (This group hasn’t been the source of any generational angst yet, but give it time.)

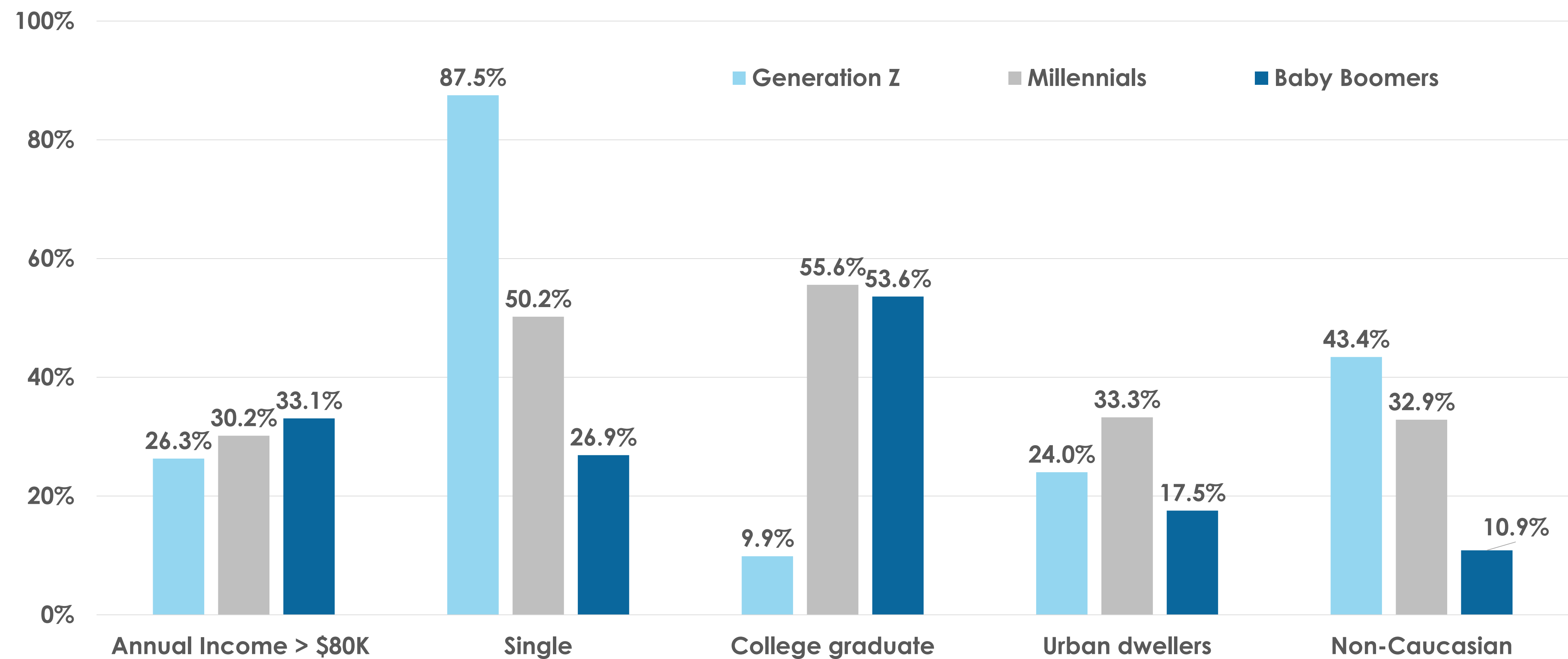
Many Gen Z-ers are still just kids — the oldest members of this demographic are graduating from college now — but since today’s teenagers are the workers and consumers of tomorrow, marketers and employers are eager to get a handle on them. They want to know how this generation differs from others, its values, how it interacts with brands, and what its members want to

The State of the American Traveler, Traveler Segments Edition, Destination Analysts, Inc.

DestinationAnalysts

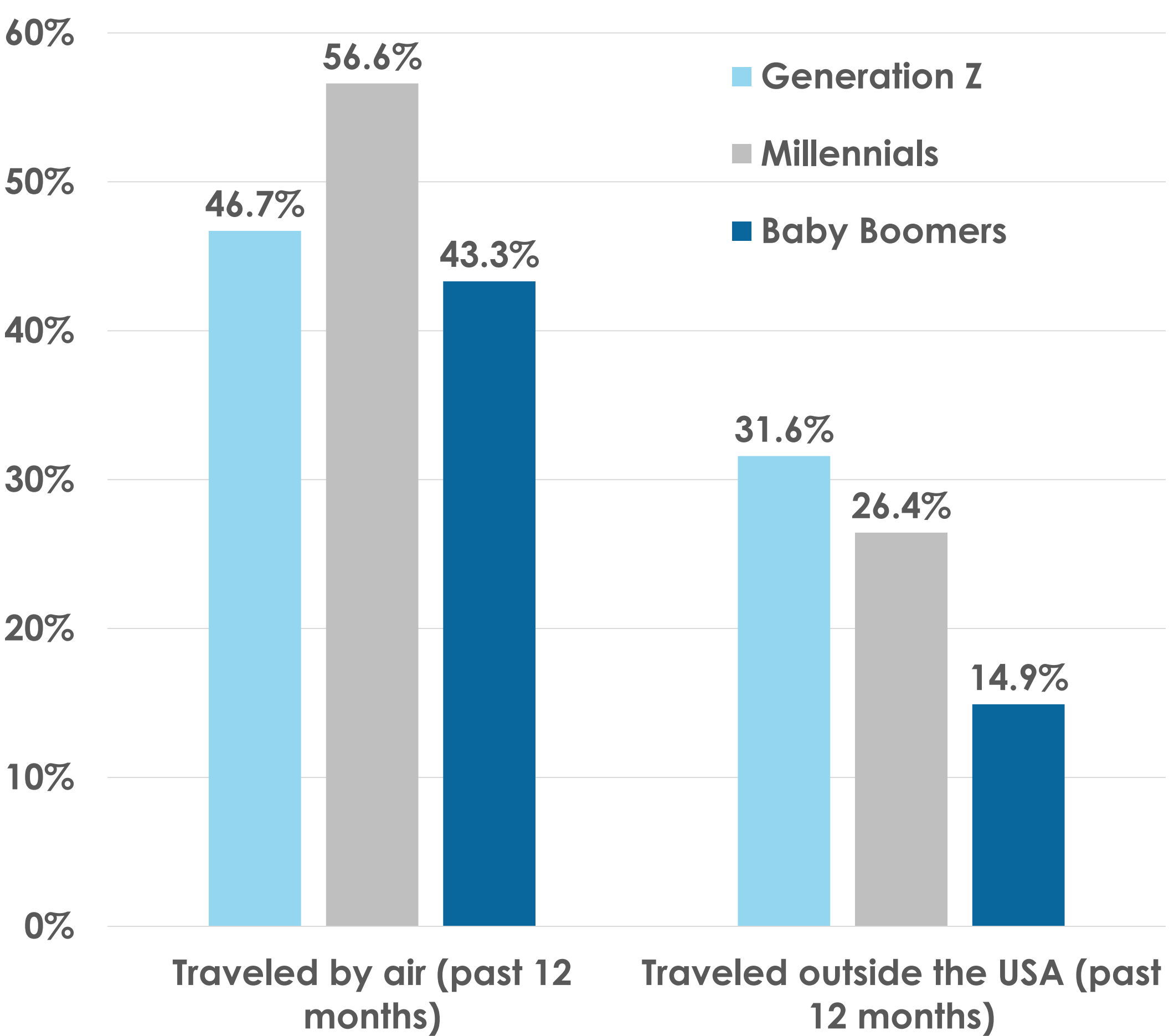
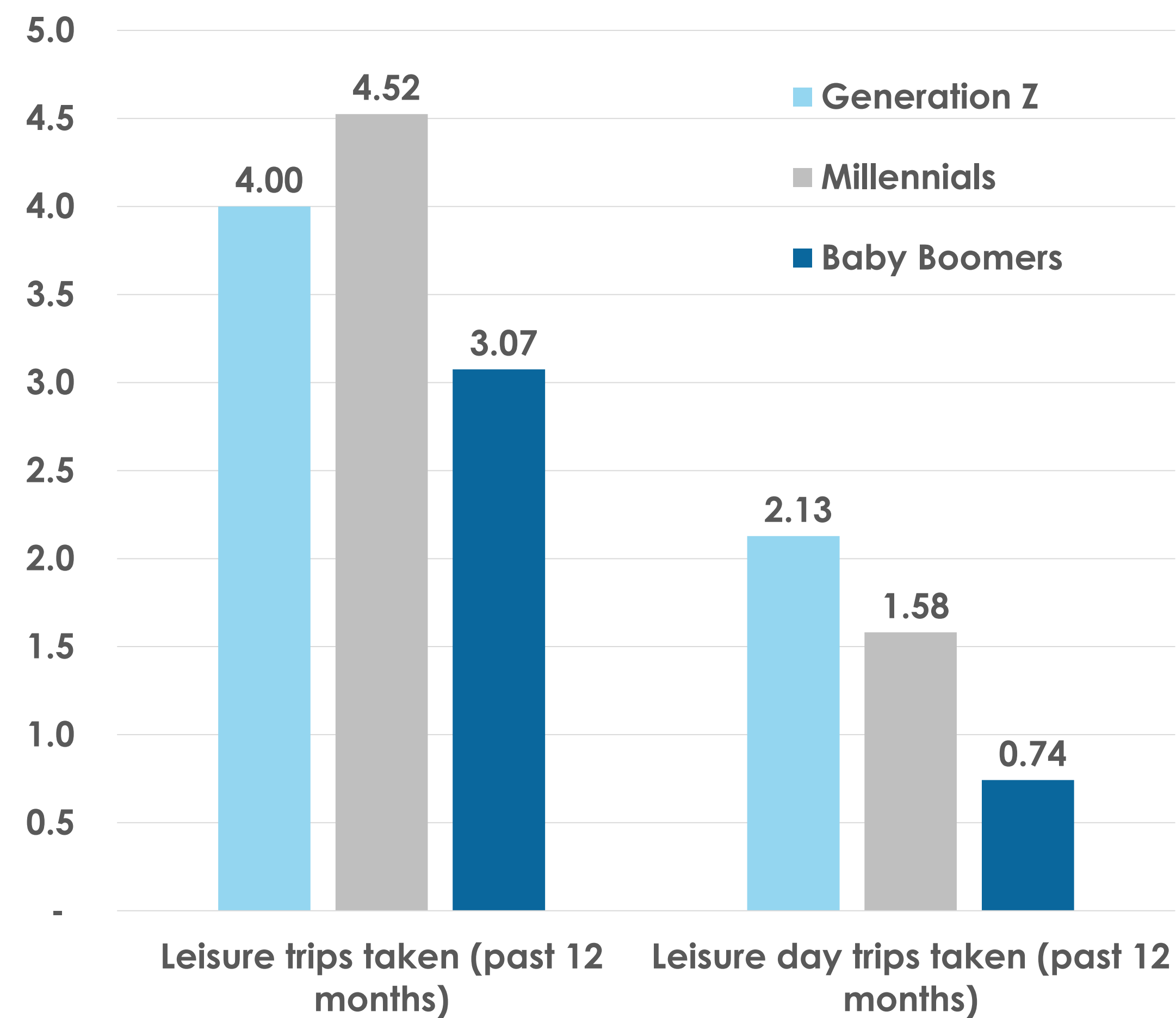


# Generation Z: Demographically Different



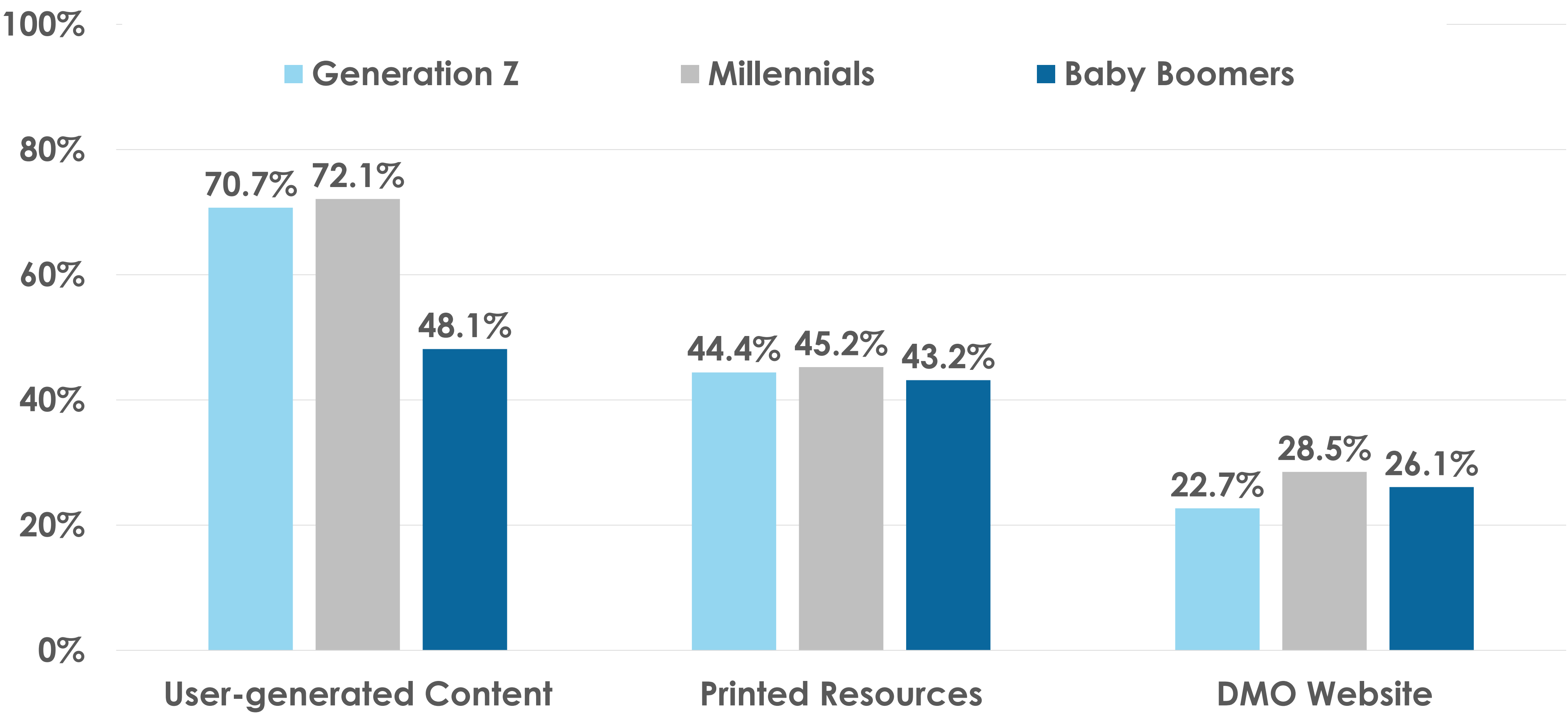


# Generation Z: How They Travel





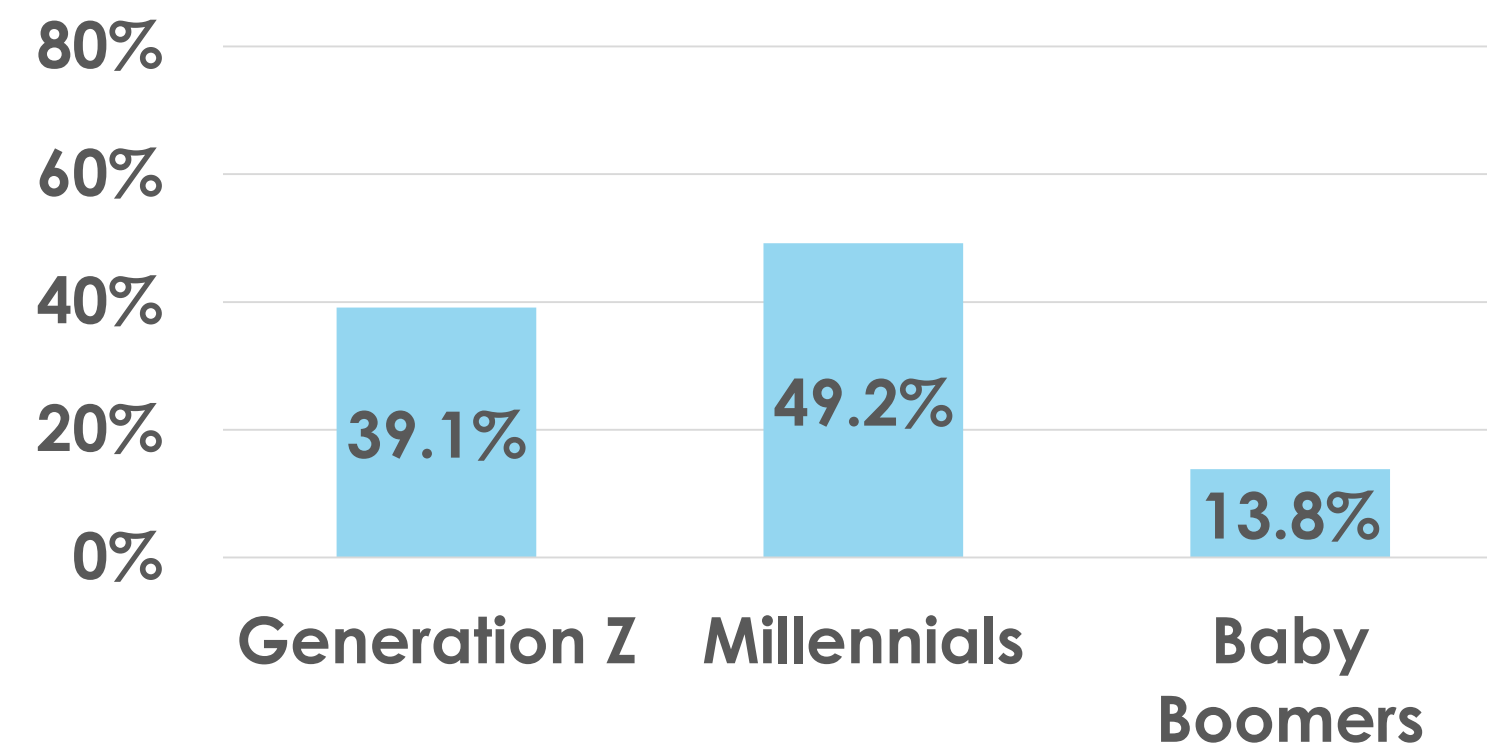
# Generation Z: Travel Planning Behaviors



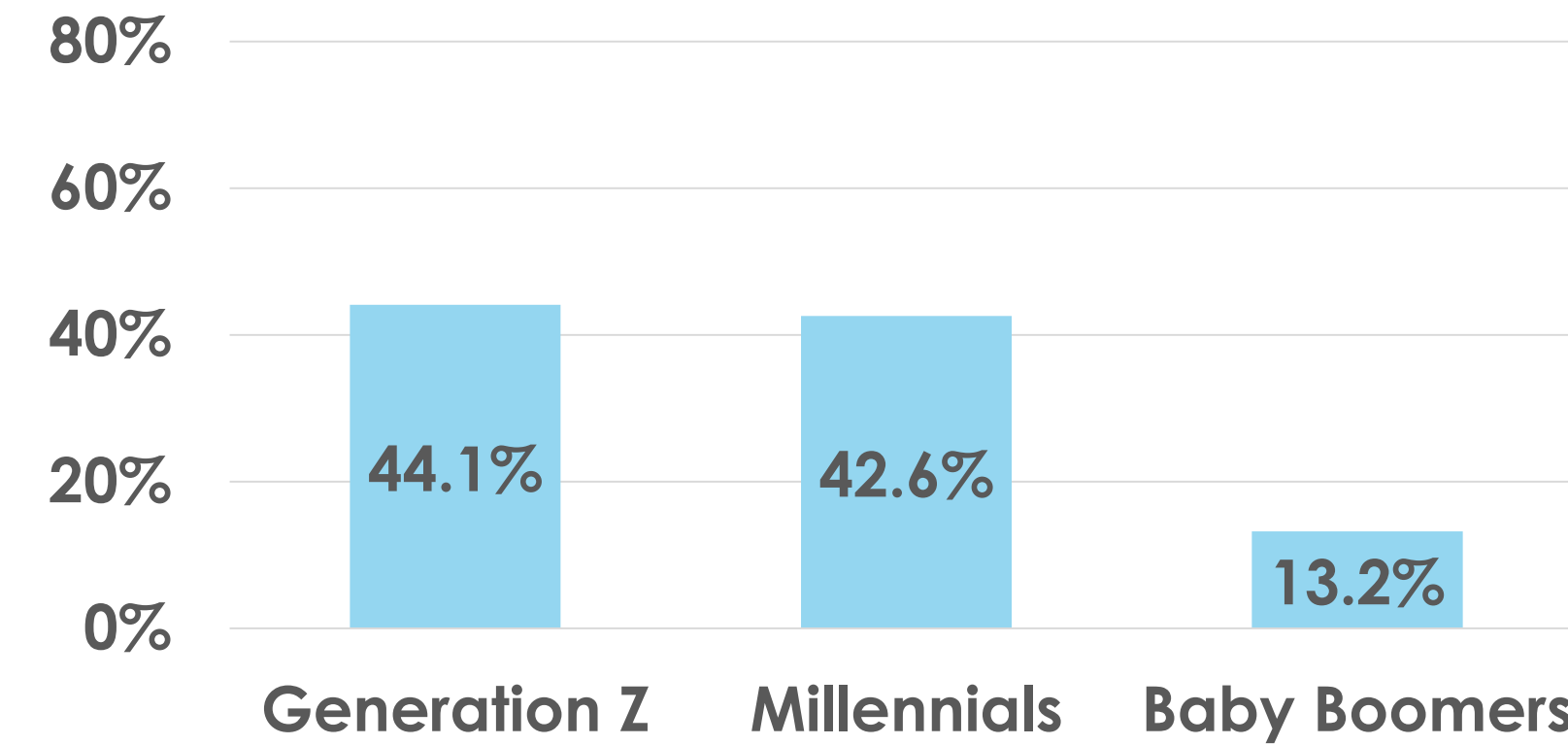


# Travel Behaviors: Generation Z

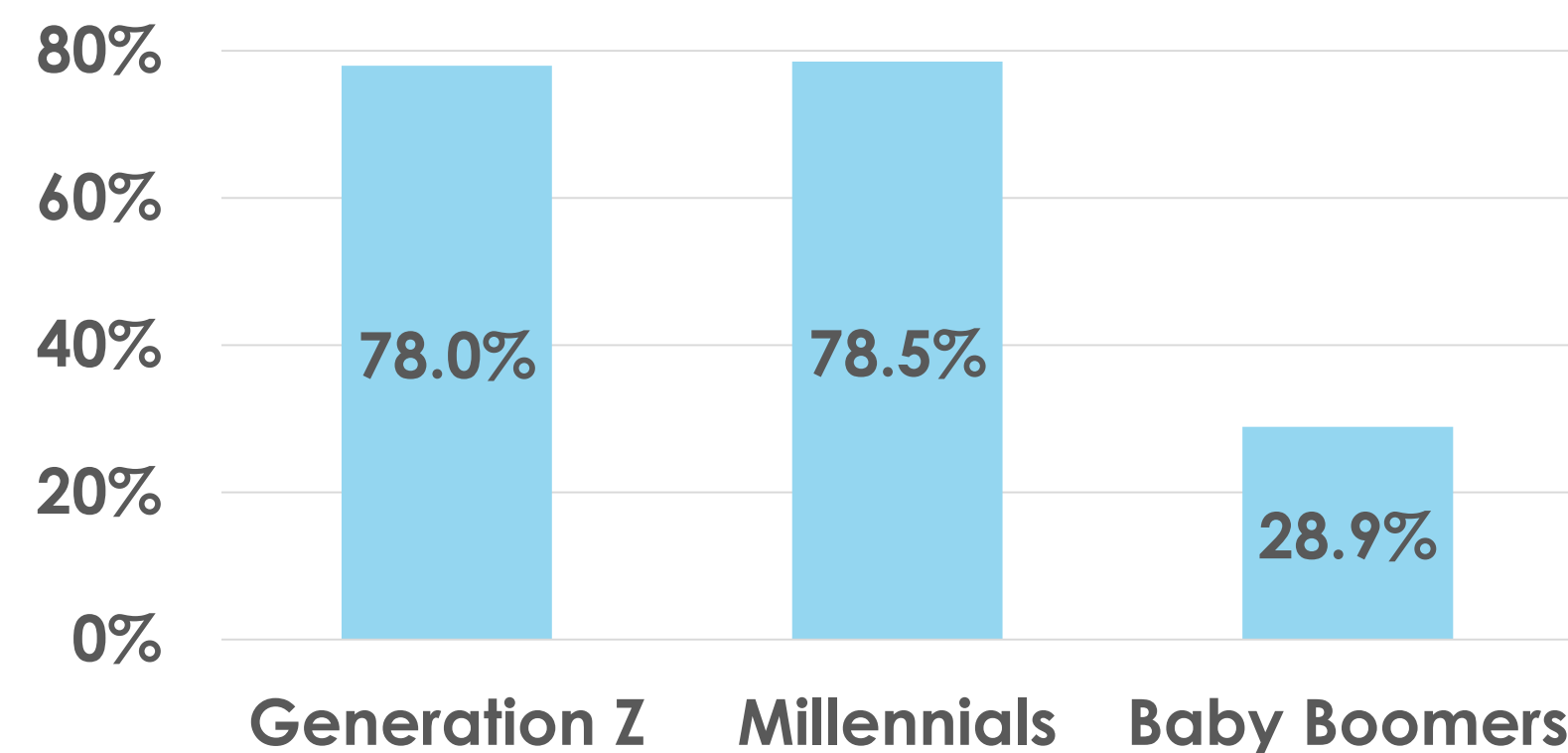
## Used Peer-to-Peer Lodging (Past 12 Months)



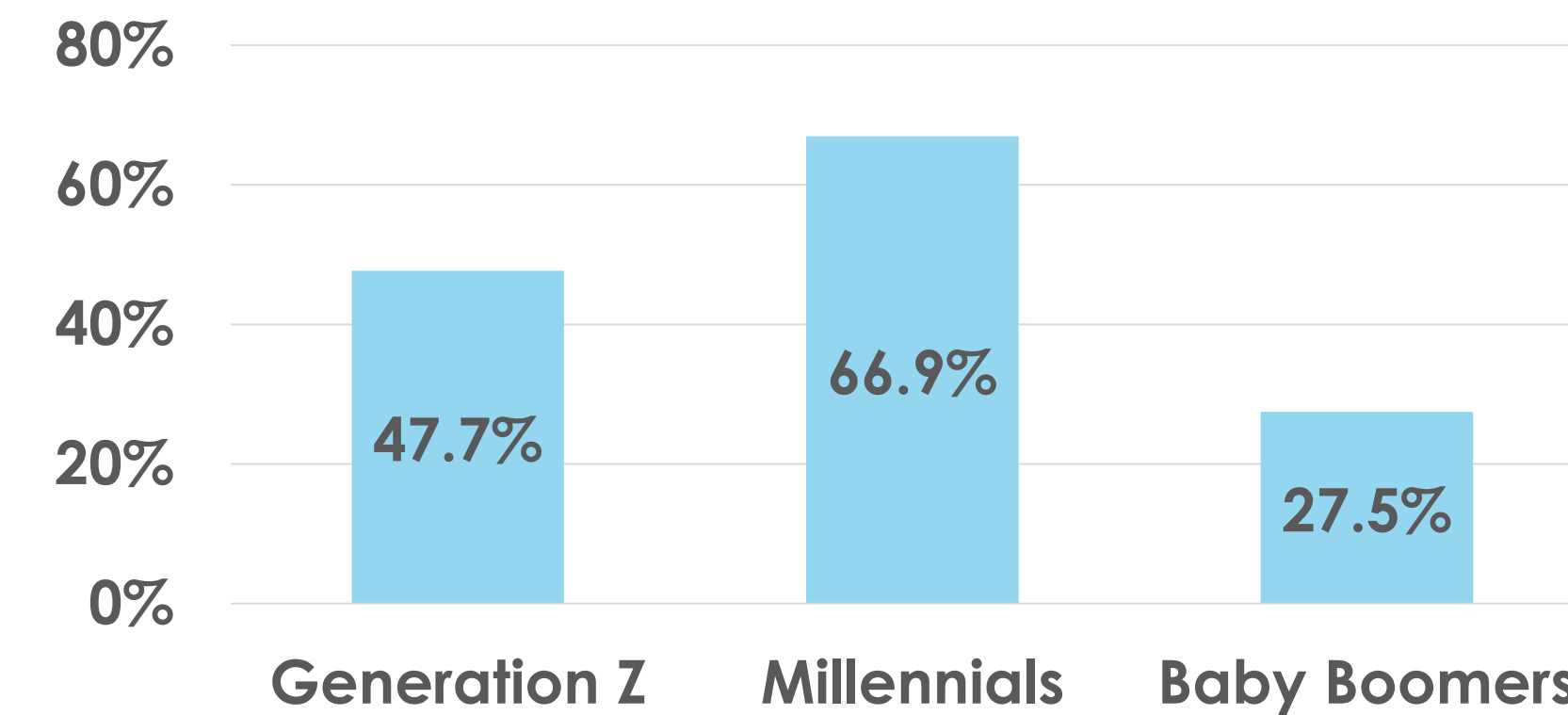
## Used Group Discount Website for Travel (Past 12 Months)



## Used Mobile Phone to Plan Travel (Past 12 Months)

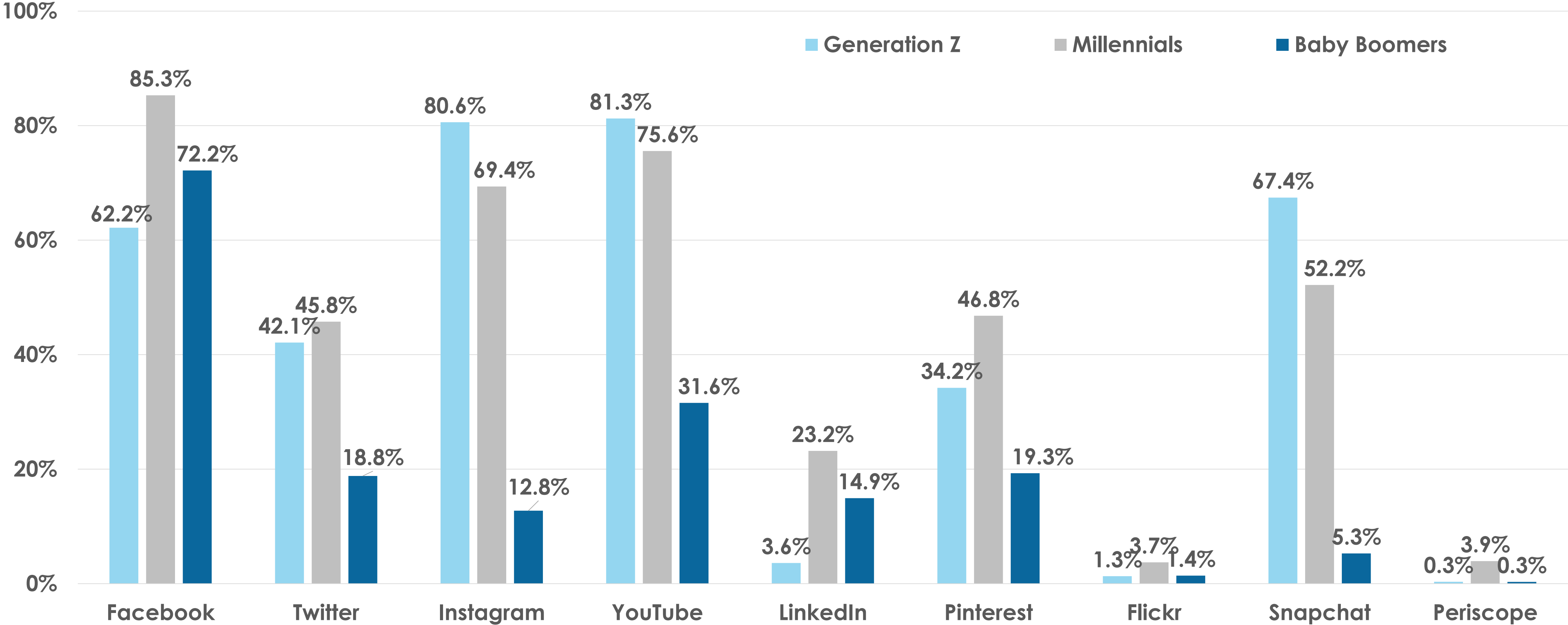


## Used Any Social Media to Plan Travel (Past 12 Months)





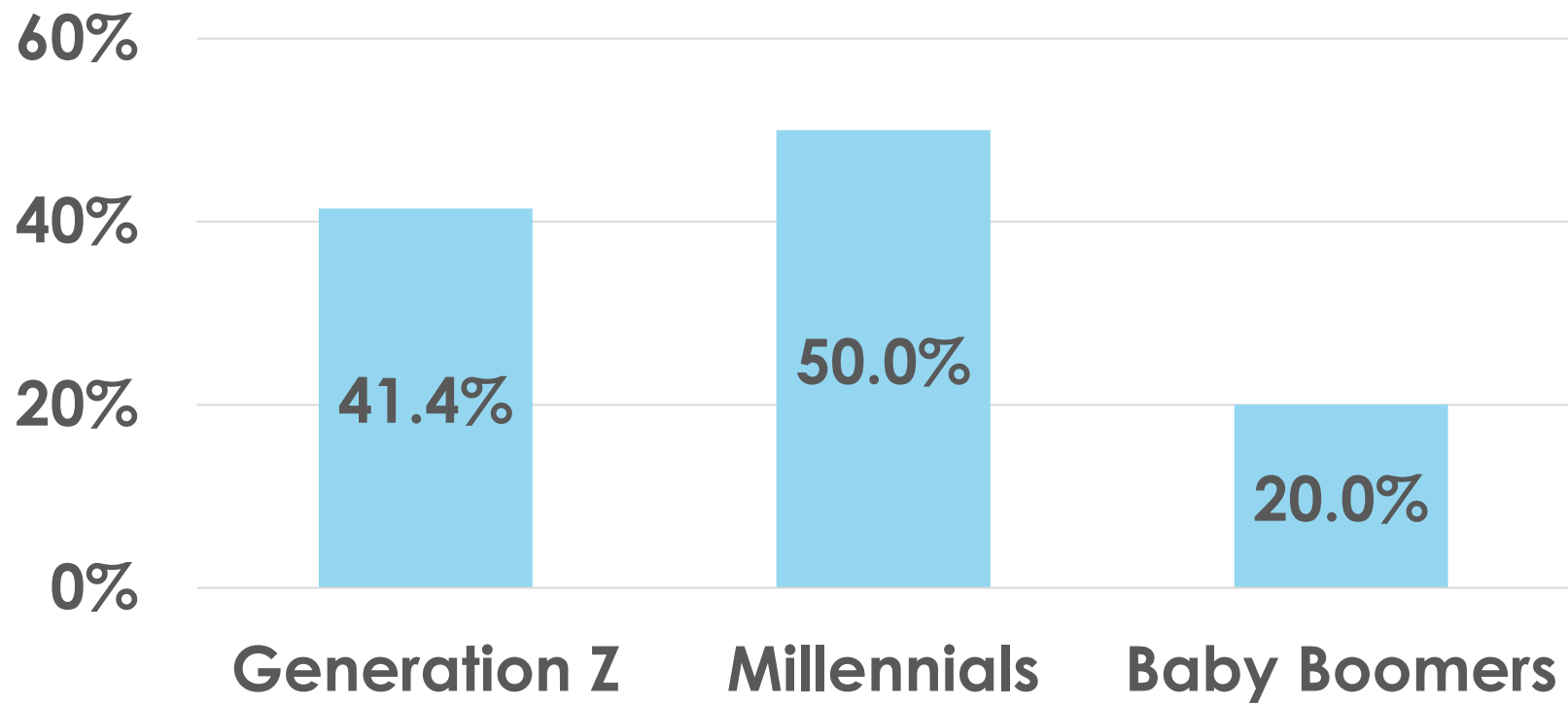
# Generation Z: Regularly Used Social Media



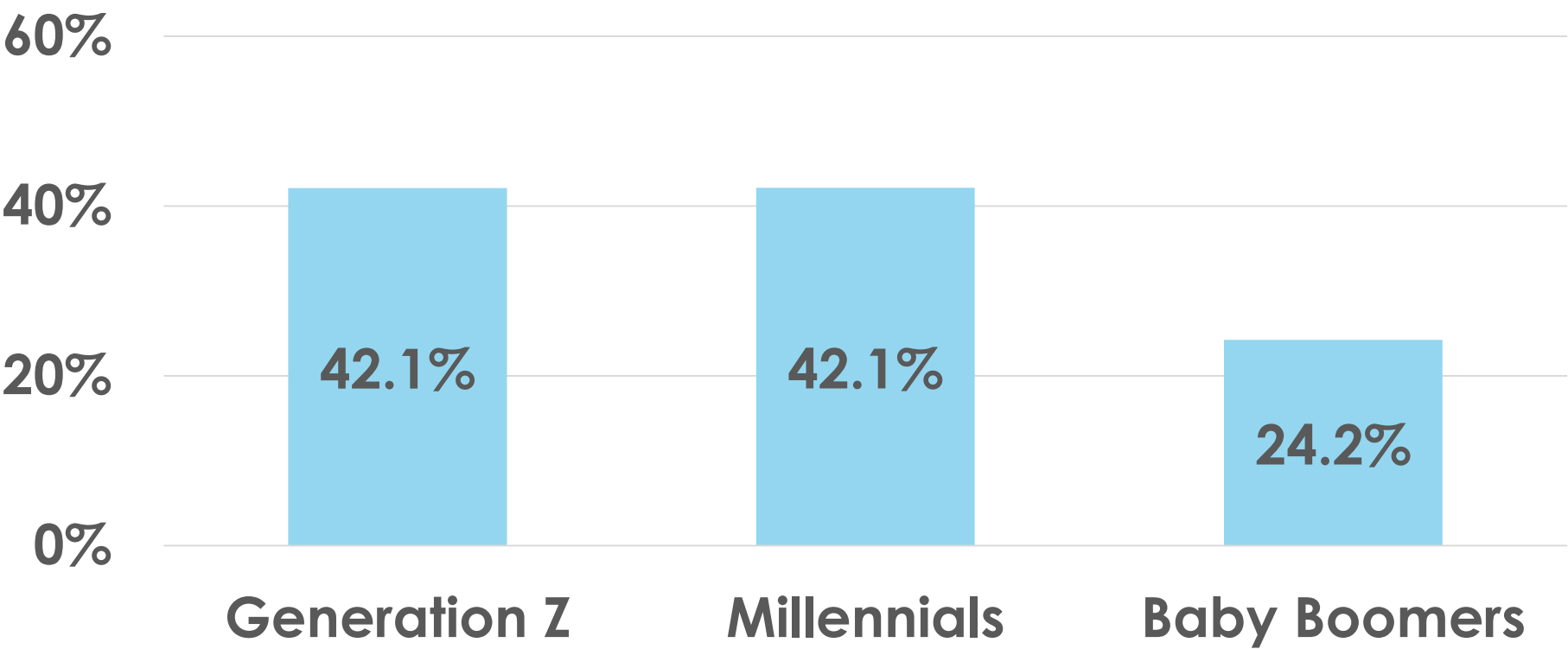


# Travel Behaviors: Generation Z

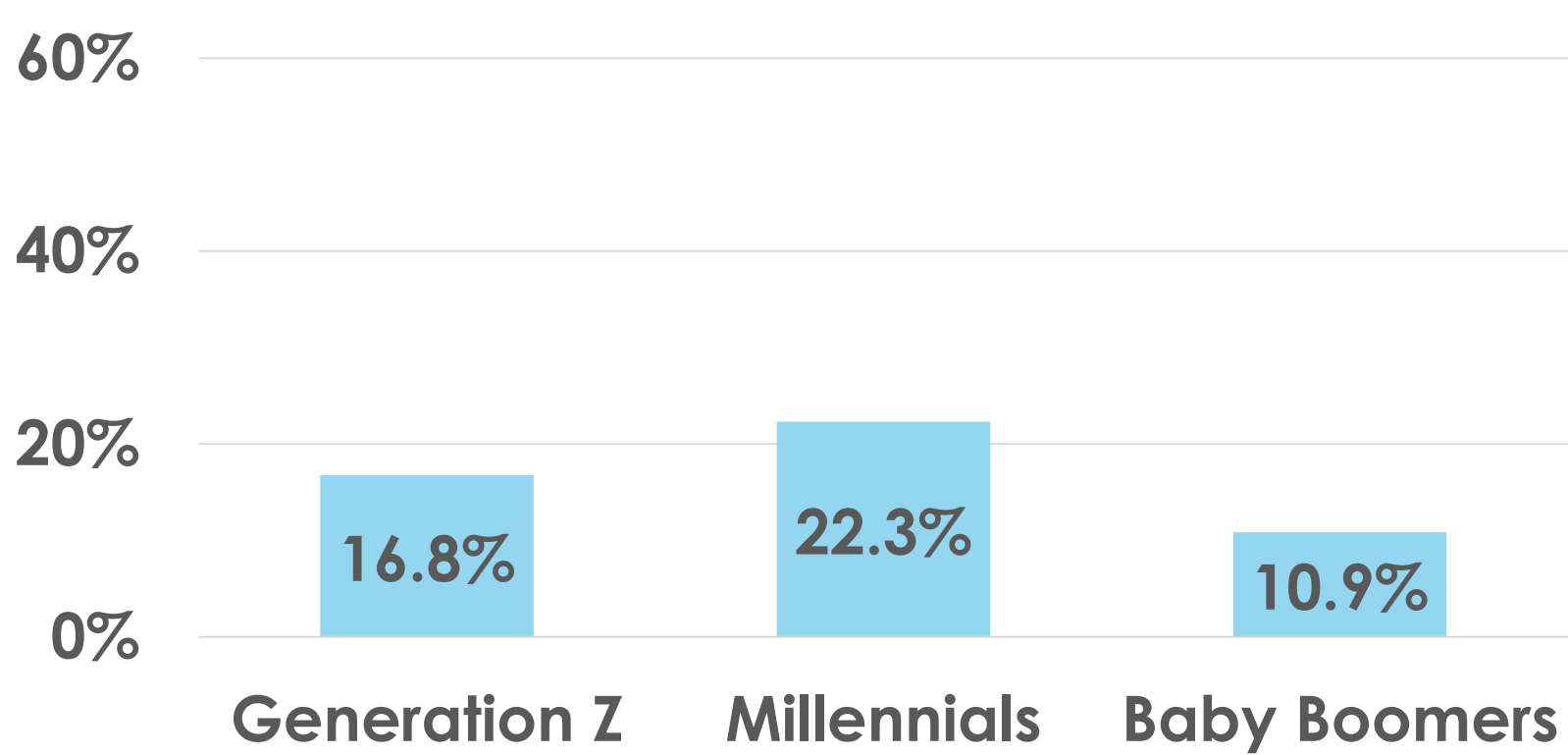
**Always Post Pictures When Traveling**  
(on Social Media)



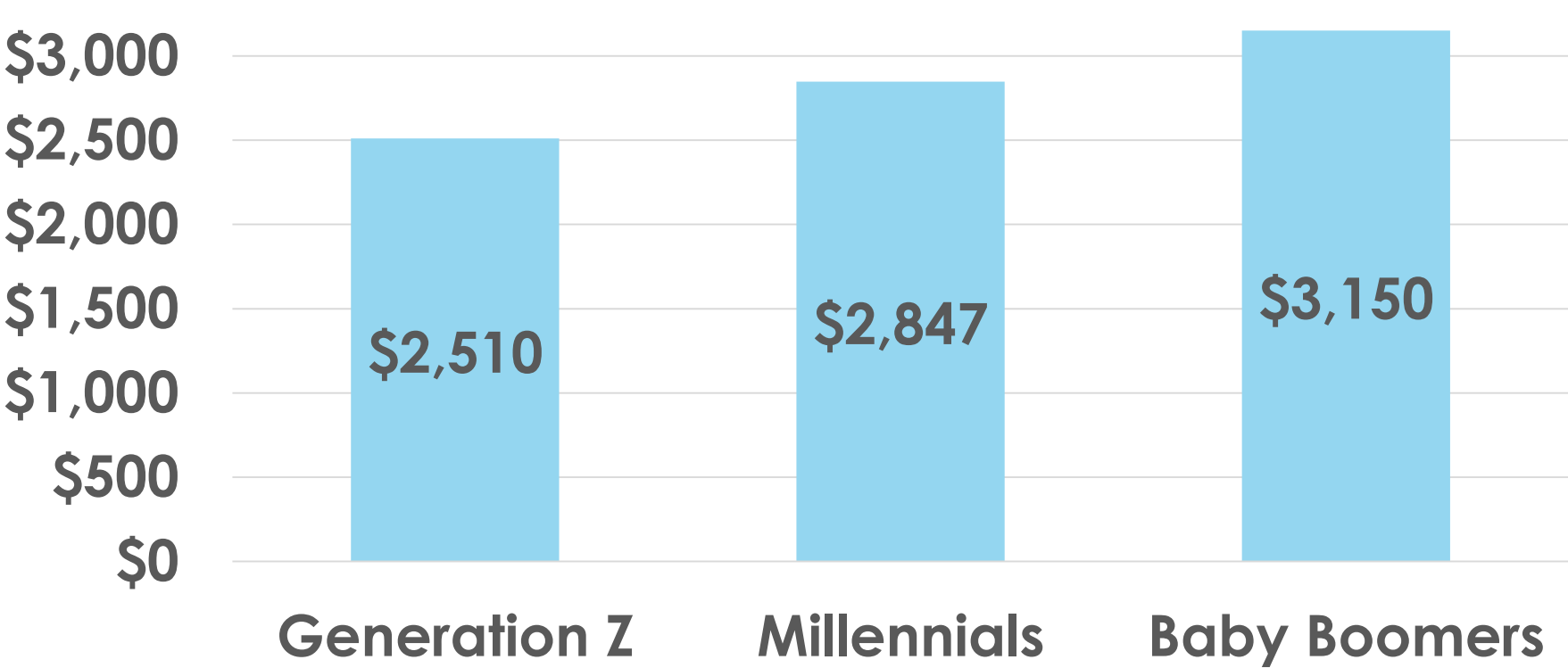
**Visited a National Park/Monument**  
(On a Leisure Trip in the Past 12 Months)



**Traveled for a Festival/Special Event**  
(Past 12 Months)

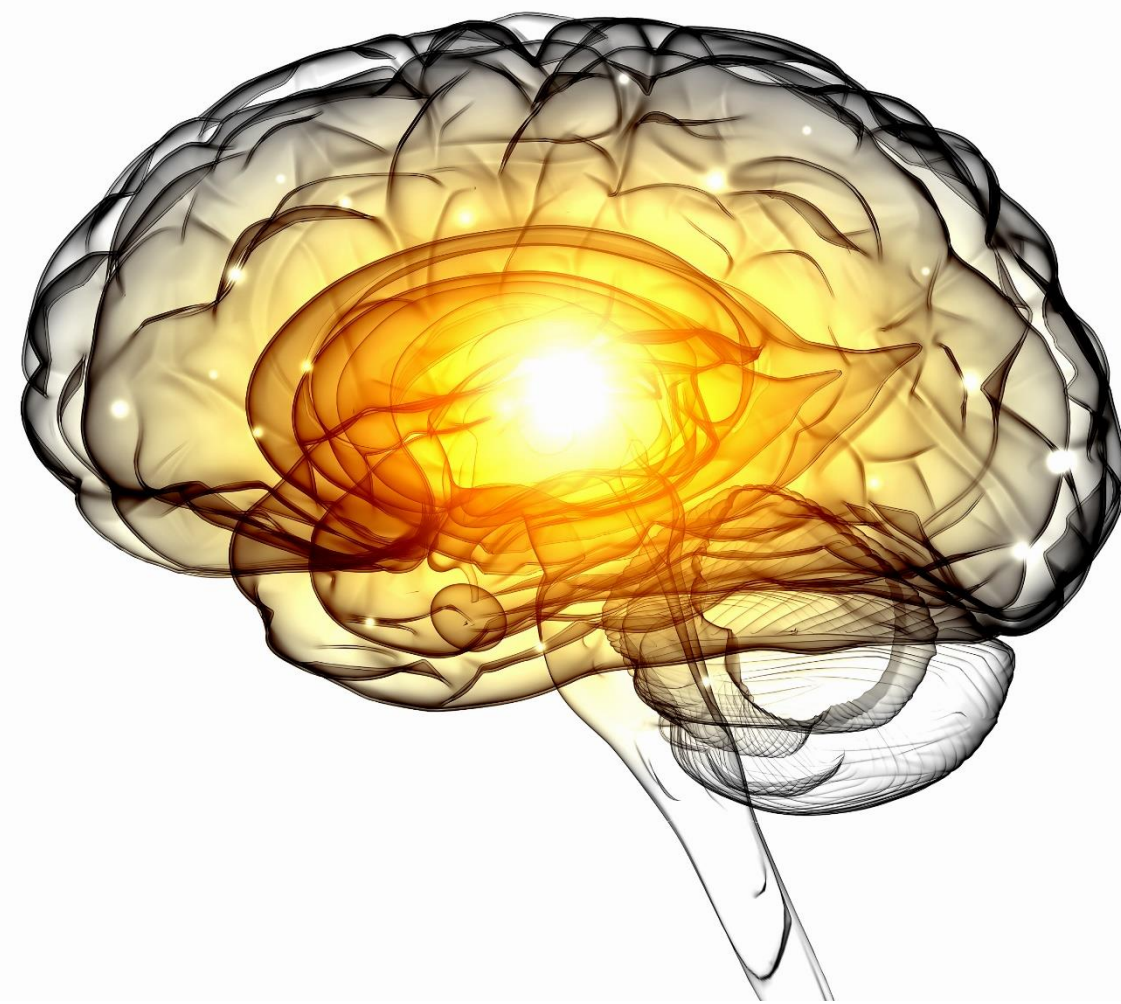


**Maximum Annual Travel Budget**  
(Next 12 Months)





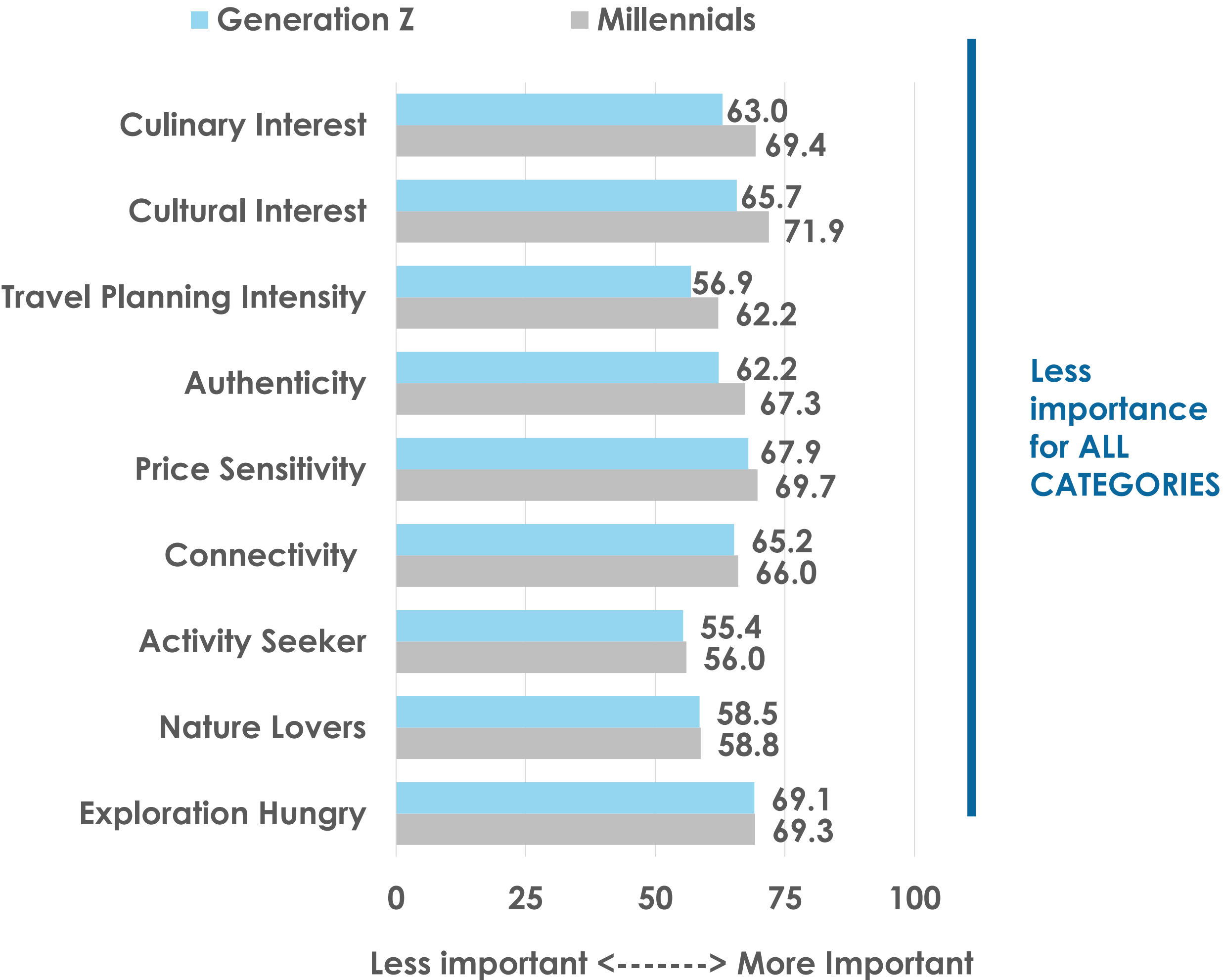
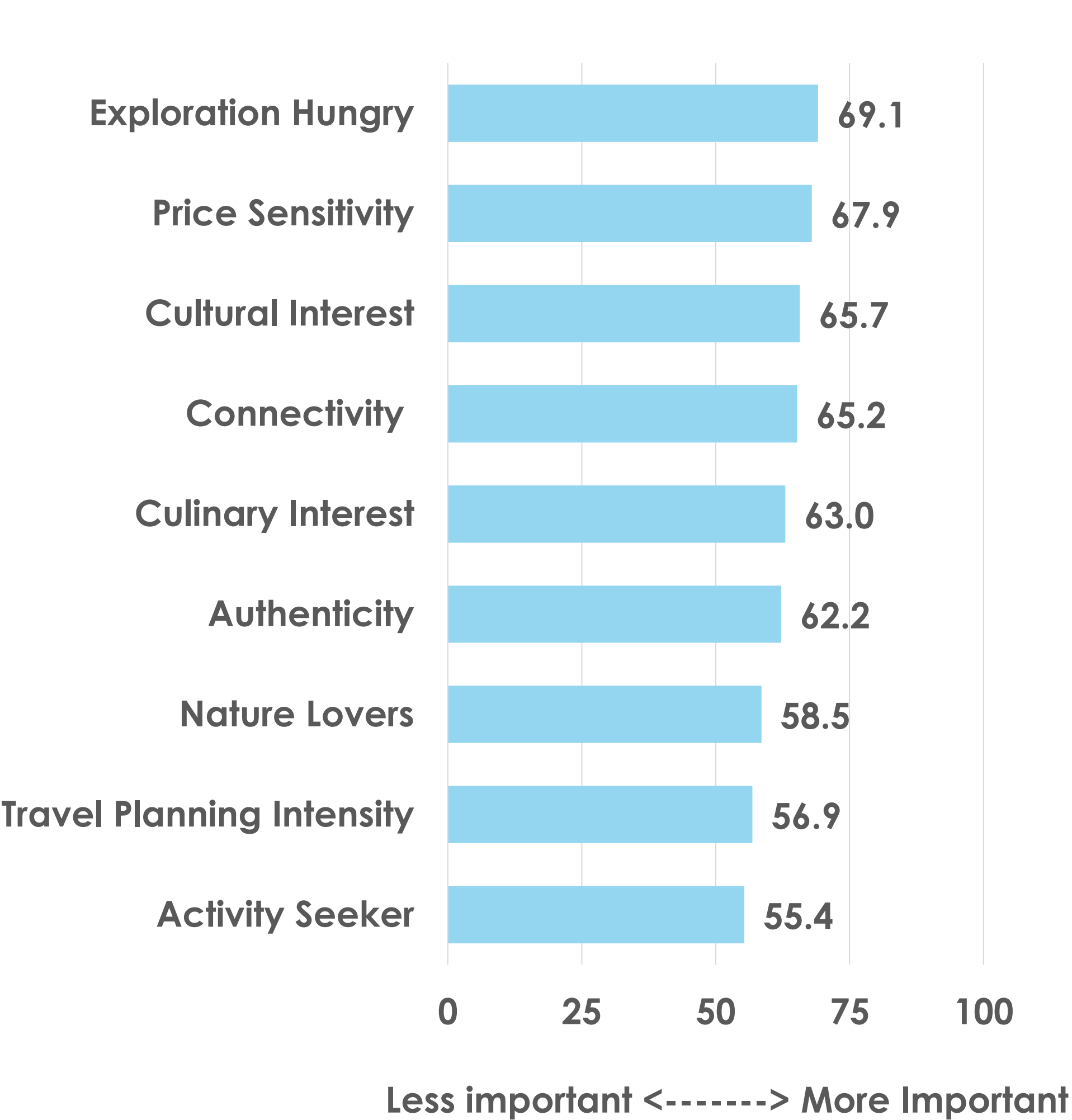
# Psychographic Intensity Indices



- **Measures the importance of key concepts to travelers**
  - Active travel styles
  - Culinary
  - Arts & Culture
  - Connectivity
  - Authenticity
  - Price Sensitivity
  - Travel Planning Intensity
  - Outdoors & Nature
  - Exploration
- **Series of questions related to each**
- **Survey respondents placed on 100 point scale**



# Psychographics: Generation Z





# Generation Z

Travelers between 15 and 23 years of age



## Takeaways

1. Demographically different
  - Primarily Single
  - Ethnically diverse
  - Lower income and educational attainment
2. Lag behind Millennials in travel volume
3. Generally similar travel planning habits in resource usage
4. Different social media consumption
5. Key Psychographics: Exploration, Culture and Price sensitivity
6. Our sense: Not fully developed as a travel segment yet





# International Travelers

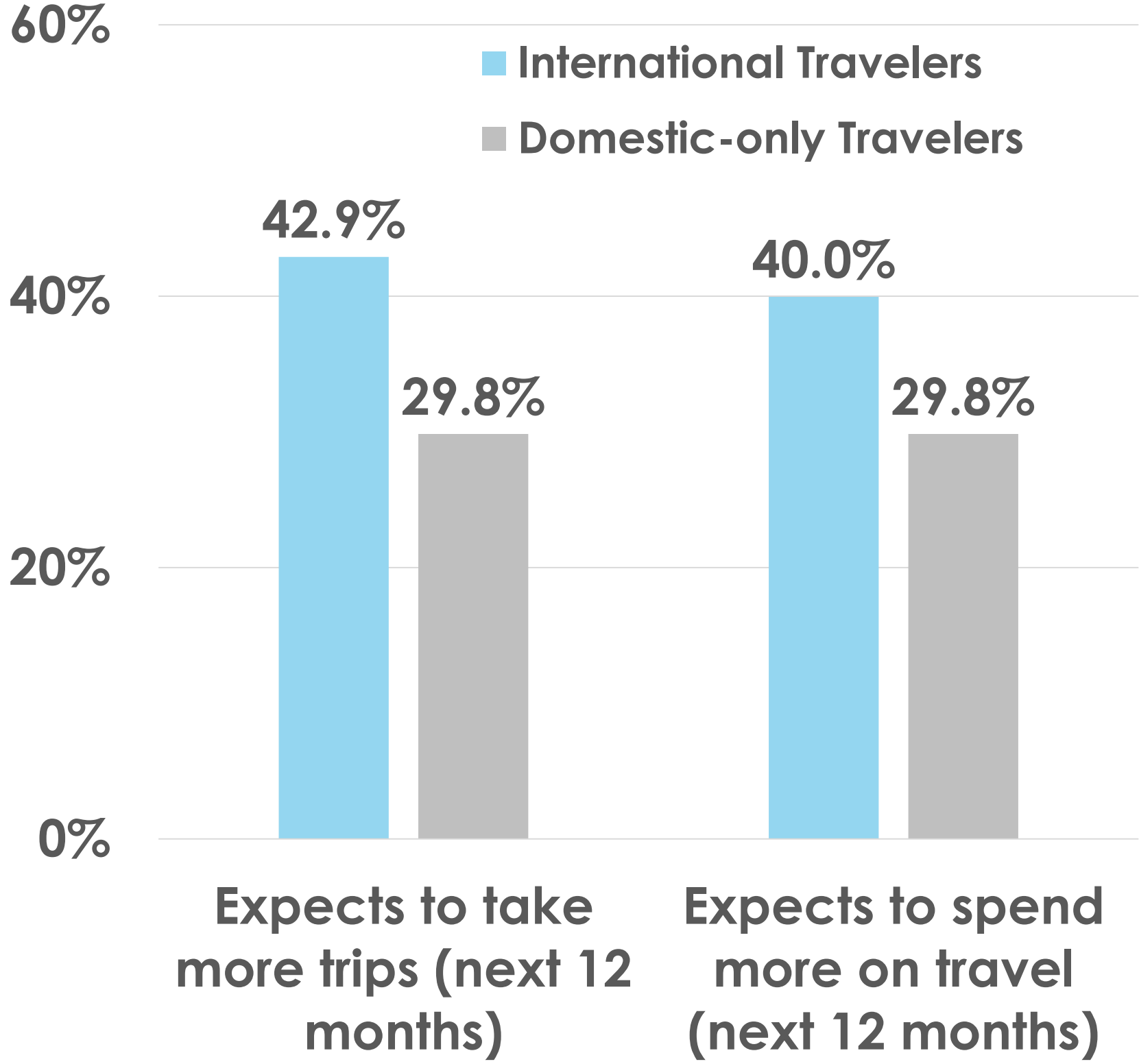
Travelers who have ventured abroad for leisure in the past 12 months

21.2%

of traveling adult Americans

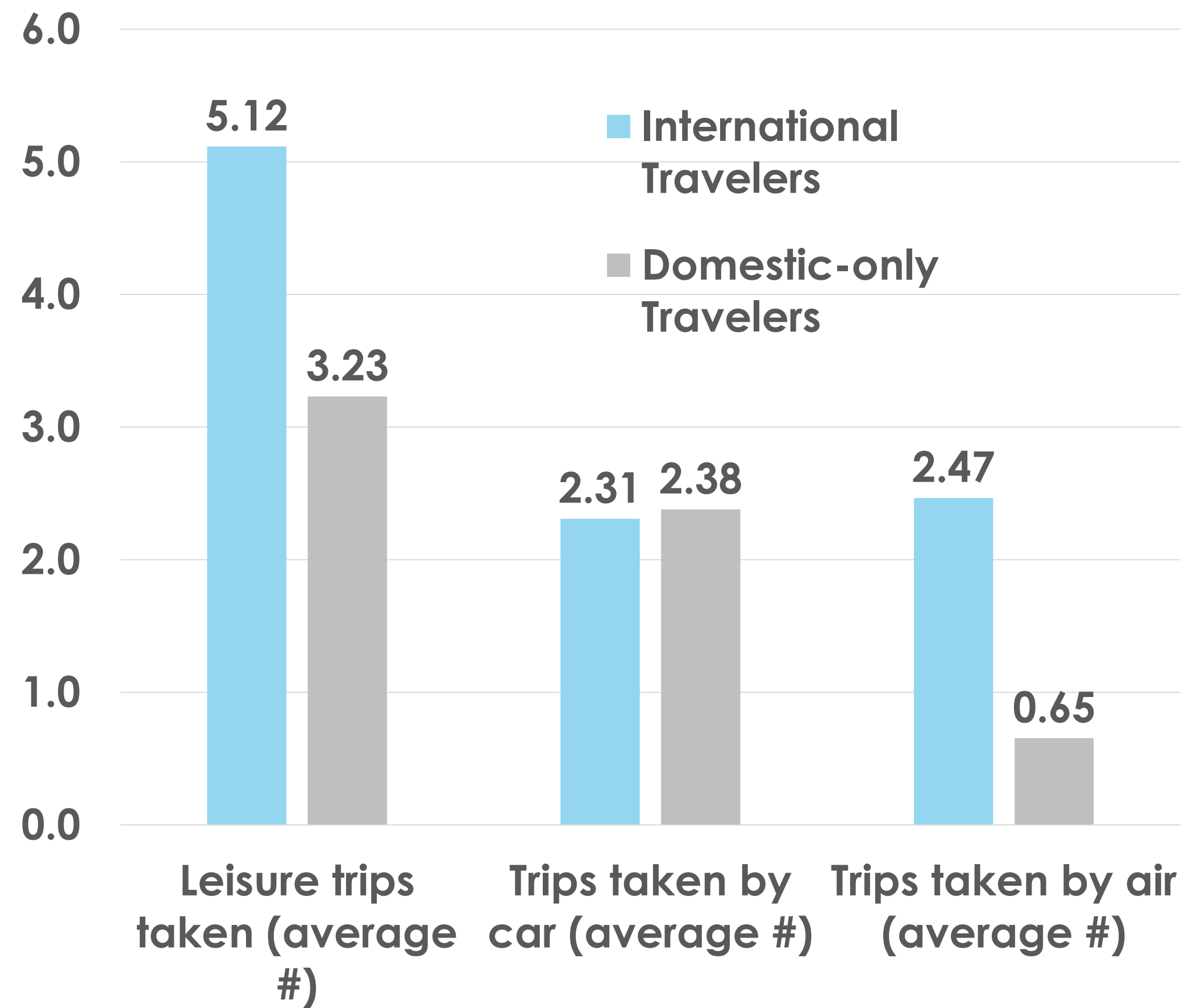
# Demographics: International Travelers

	International Travelers	Domestic-only Travelers
Average age (years)	45	50
Generation X or younger	60.8%	47.7%
Annual Income > \$80K	47.5%	30.5%
Urban Dweller	37.3%	21.1%
Non-Caucasian	31.9%	18.1%

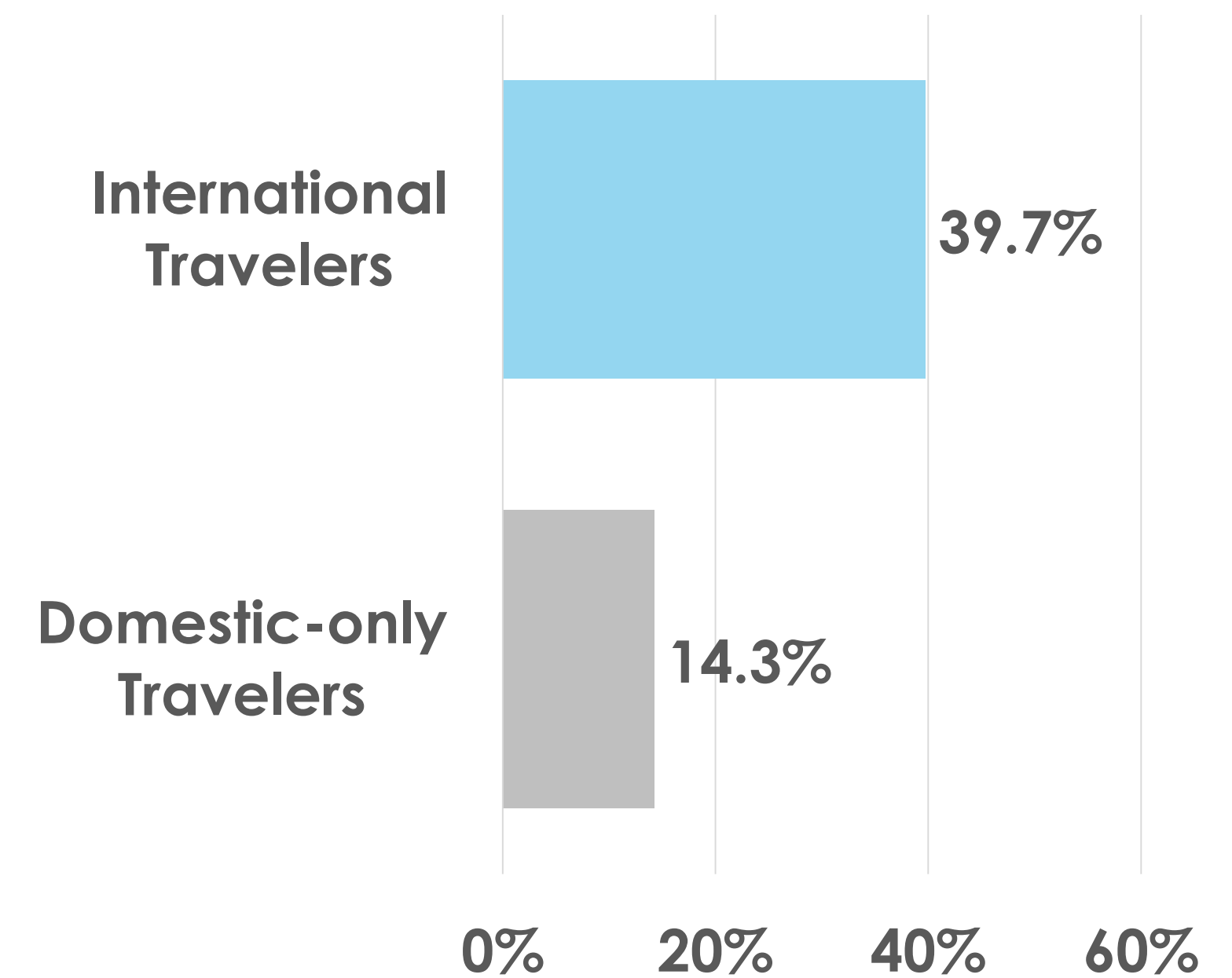




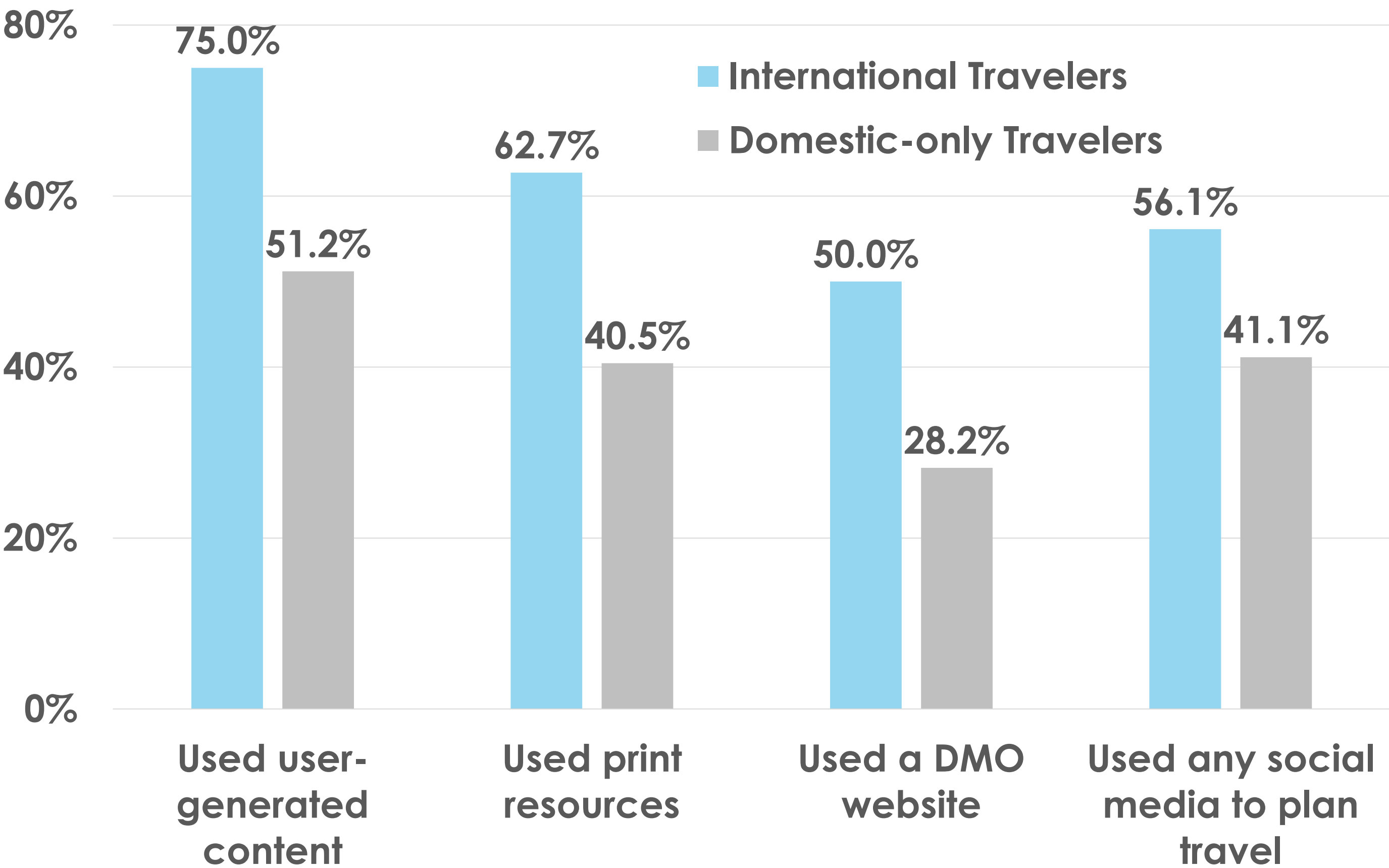
# Travel Behaviors: International Travelers



## Took at Least One Business/Convention Trip (Past 12 Months)



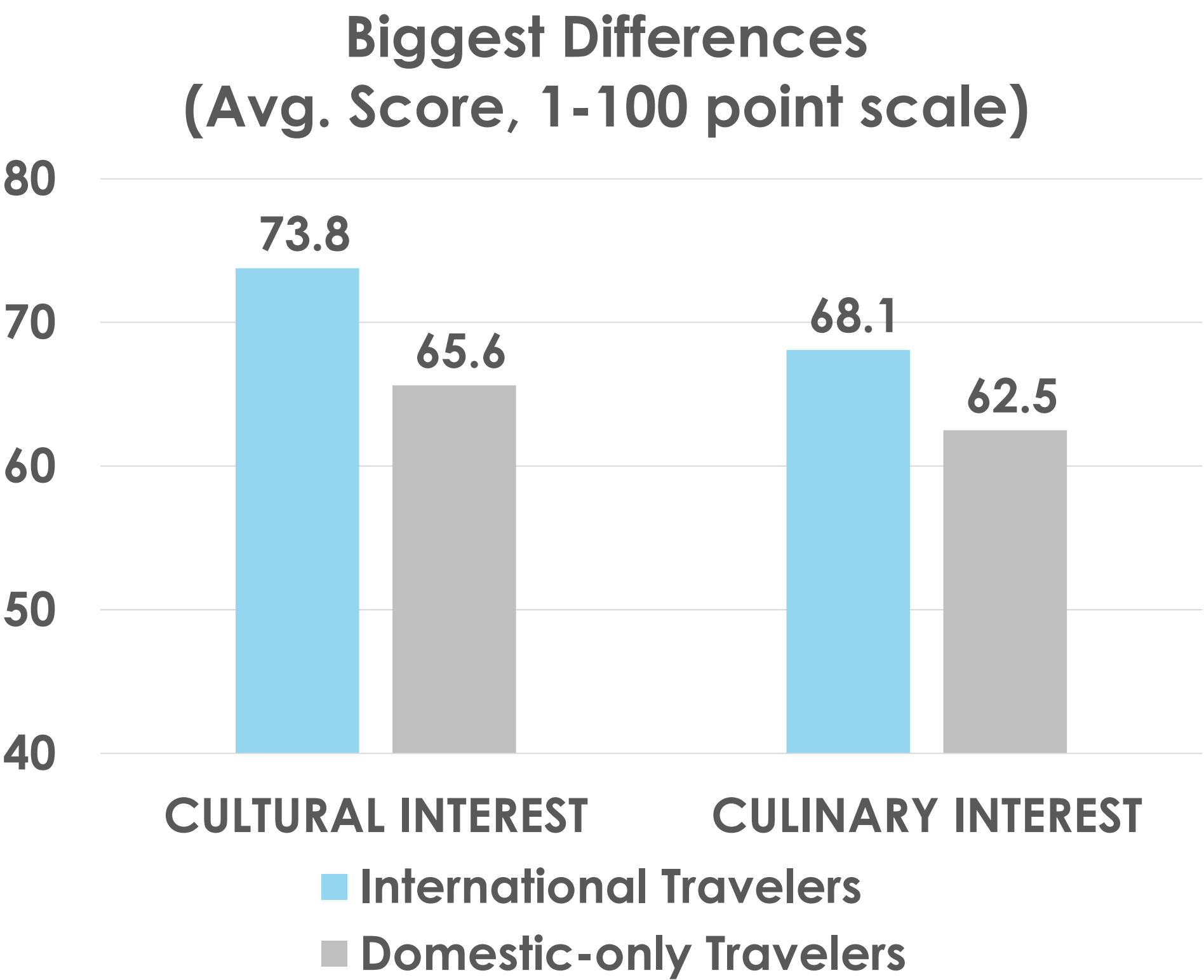
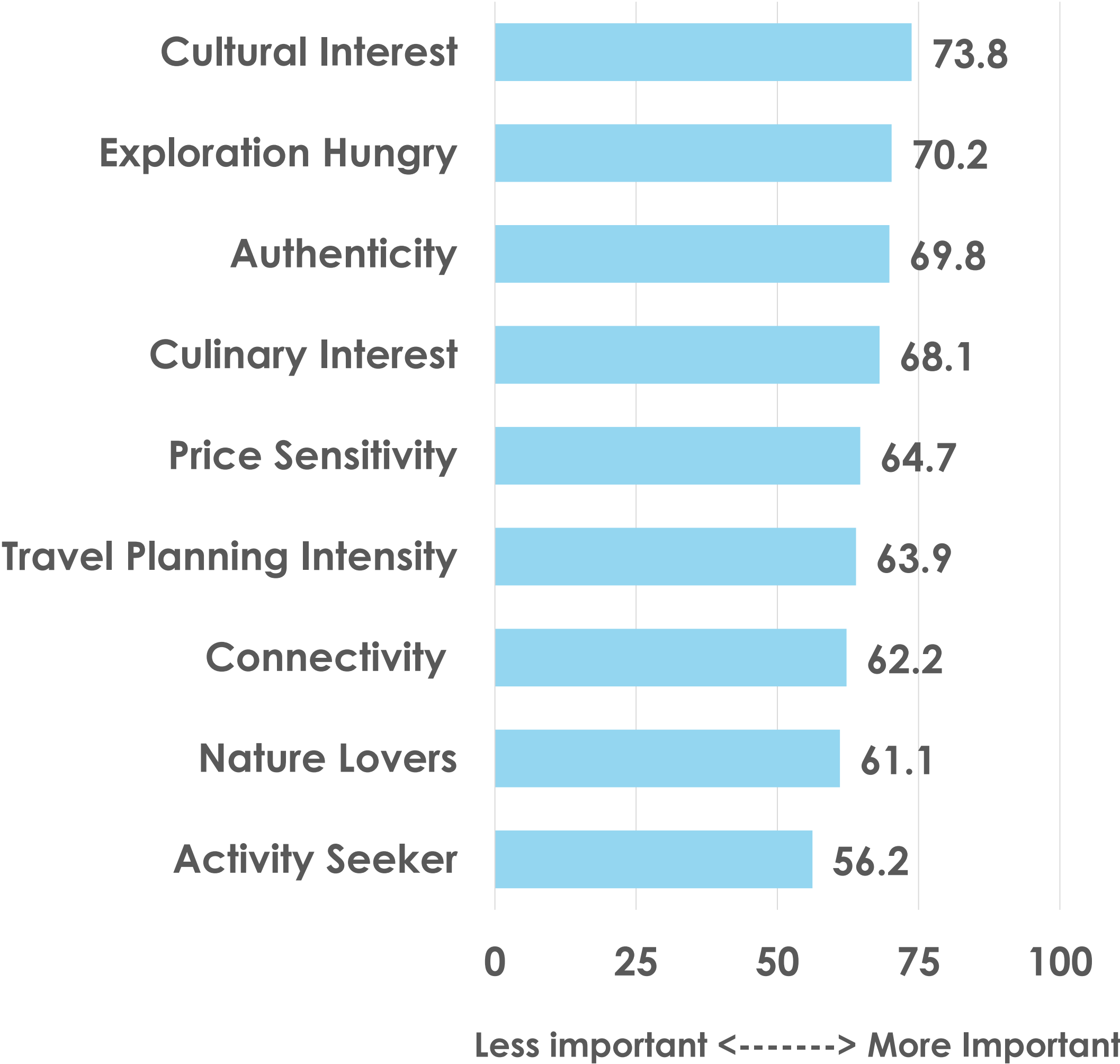
# Planning Resources: International Travelers



**The Quintessential  
Hyper-Informed  
Traveler**



# Psychographics: International Travelers



# International Travelers

Travelers who have ventured abroad for leisure in the past 12 months



## Takeaways

1. **Super Gung-Ho for Travel**
  - More trips
  - More spending
  - More enthusiasm for increasing their travels
2. **Culture and cuisine focused**
3. **The Quintessential Hyper-Informed Traveler**





# National Parks Travelers

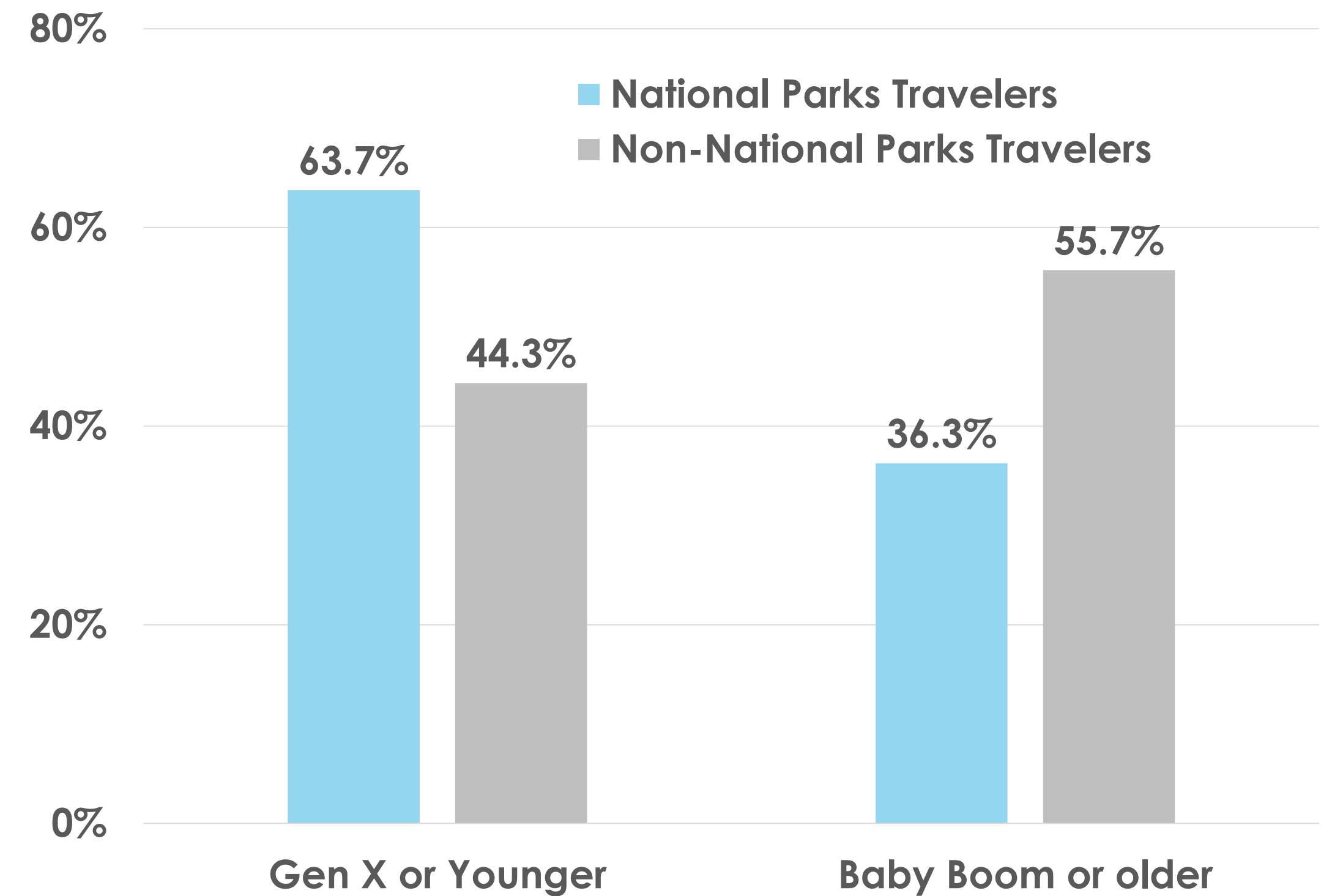
Travelers who have visited a National Park on a leisure trip in the past 12 months

# 32.1%

of traveling adult Americans



# National Parks Travelers



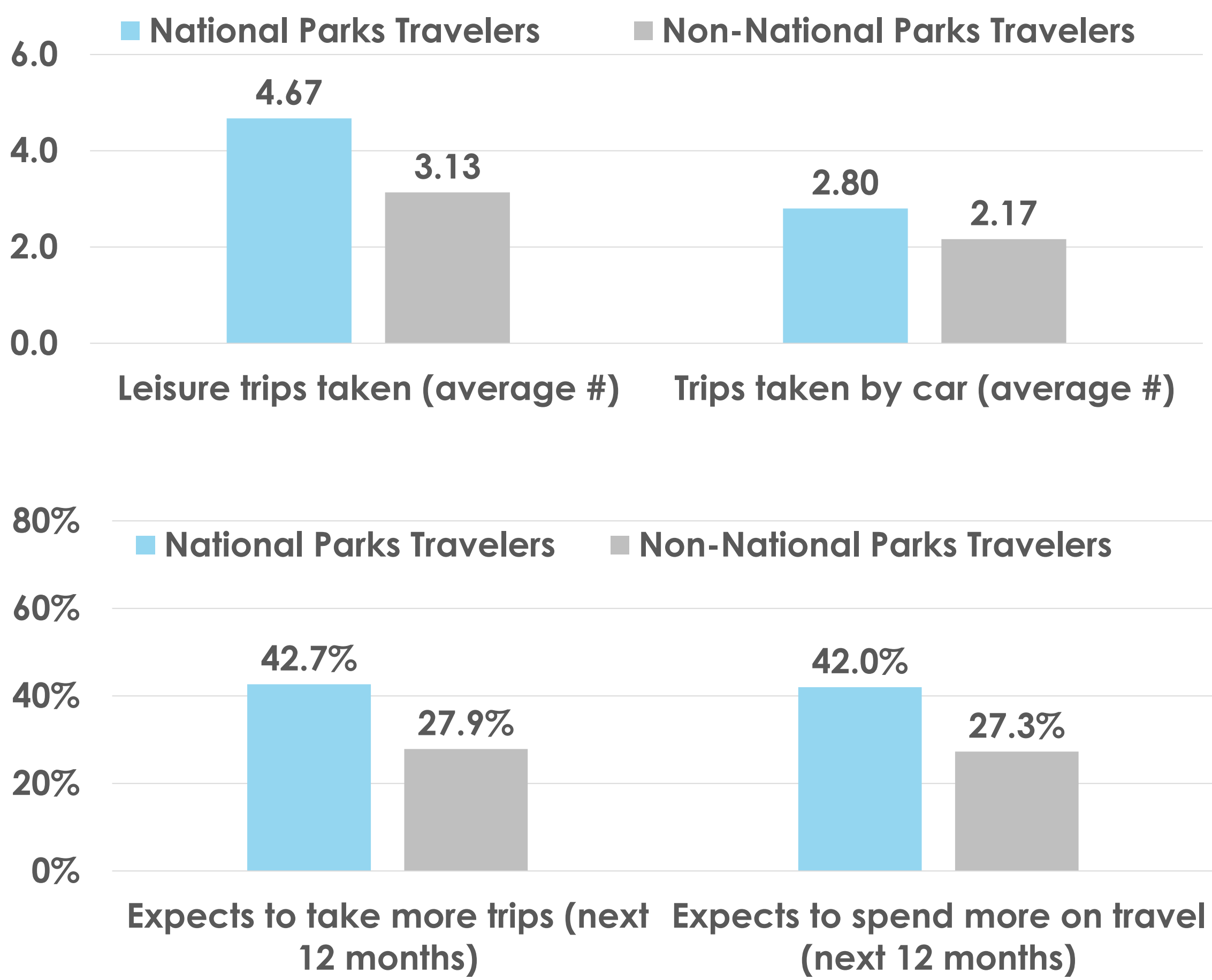
**National Parks Travelers**  
**Average Age 44**

**Non-National Parks Travelers**  
**Average Age 51**



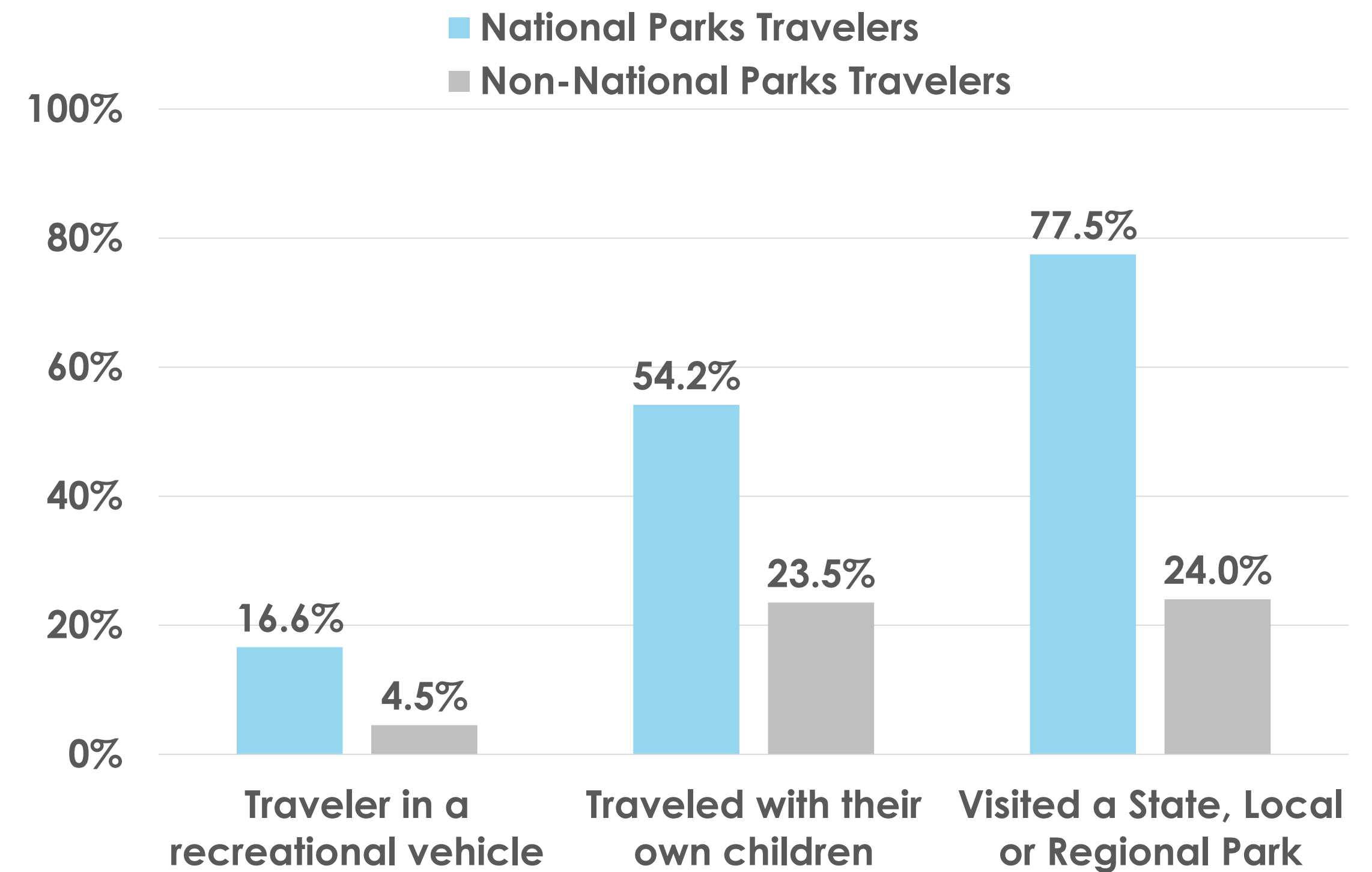
# National Parks Travelers

*Frequent, highly enthusiastic travelers...*





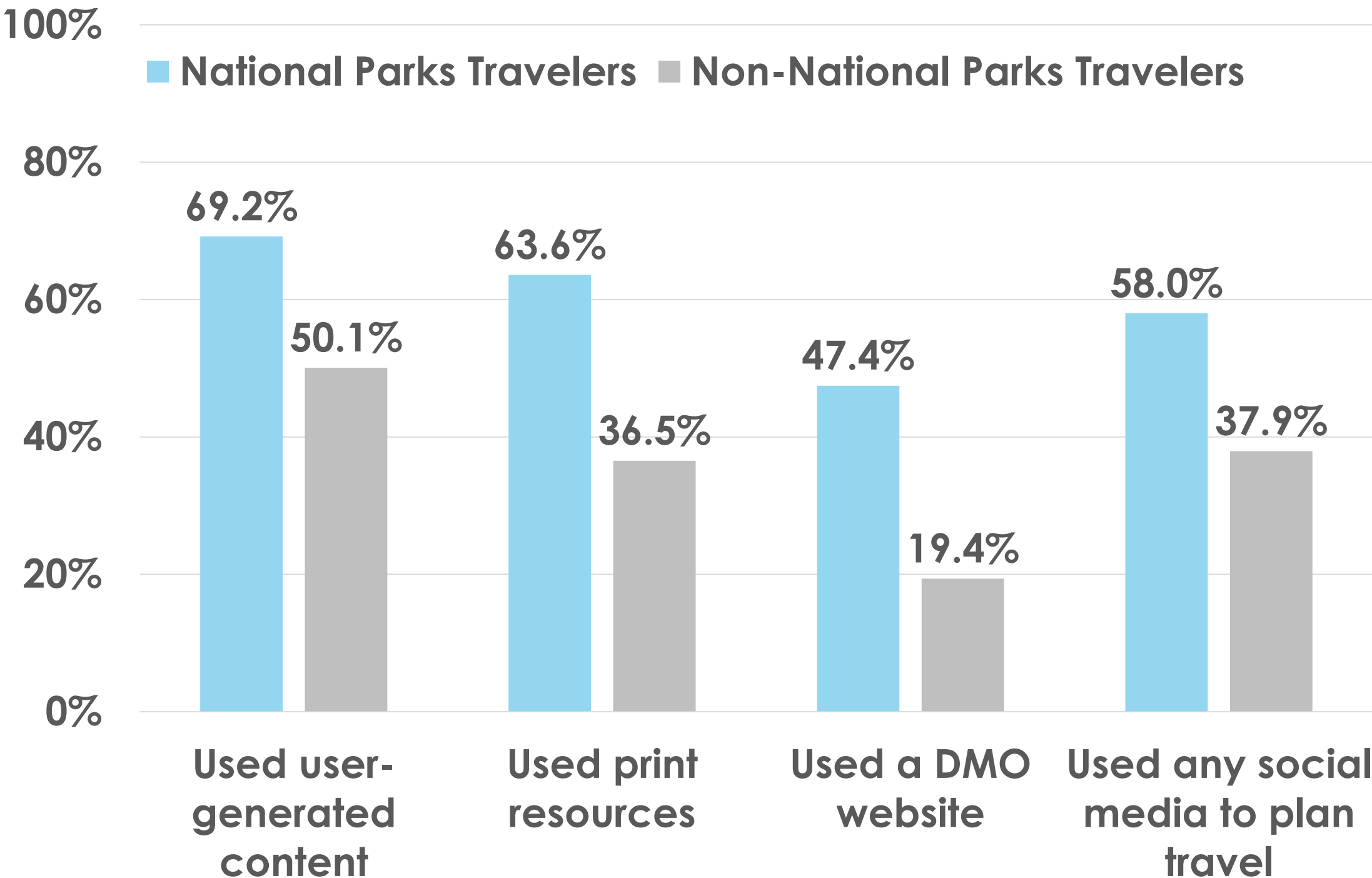
# National Parks Travelers



*Travel Activities in the Past 12 Months*



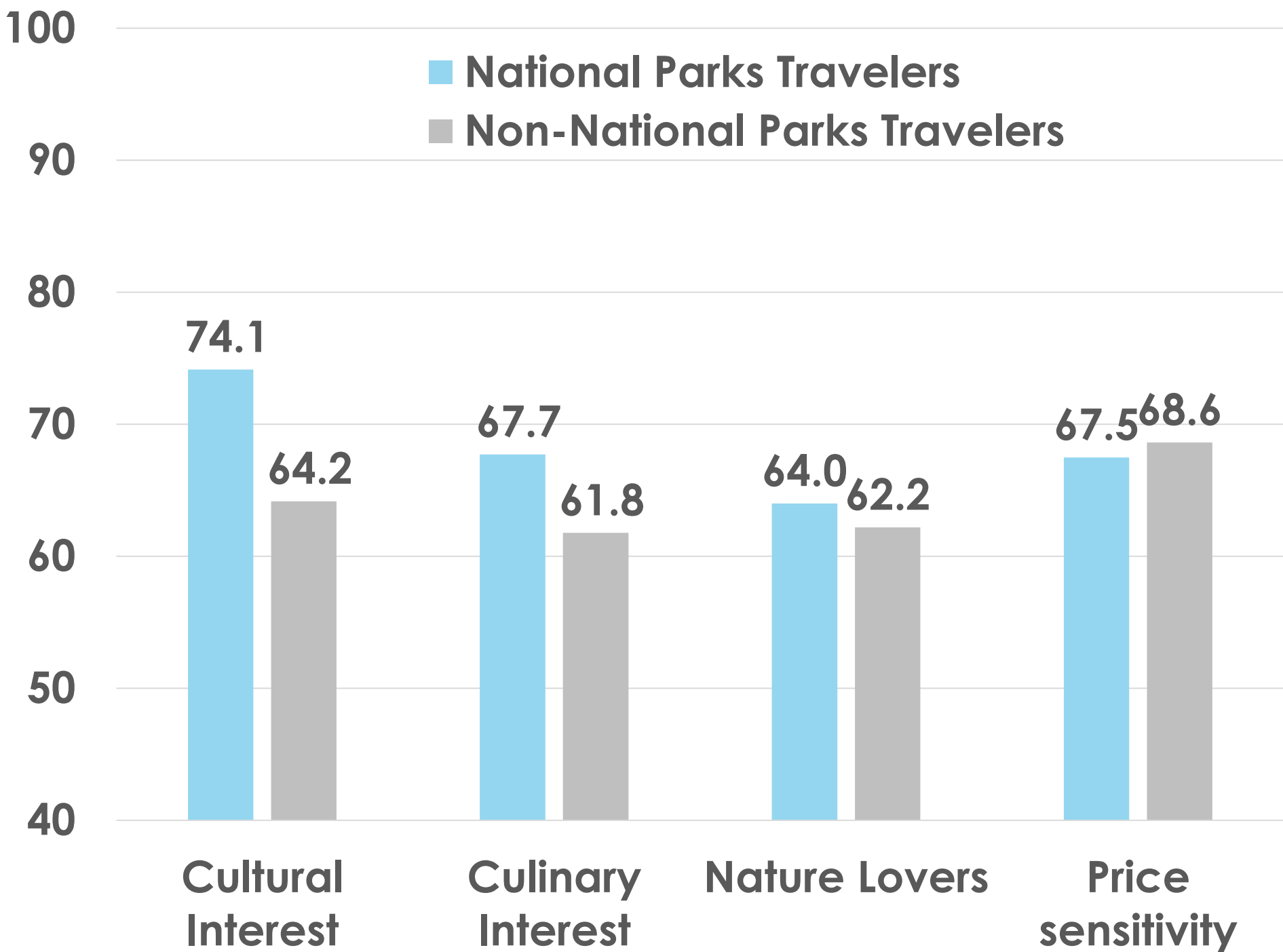
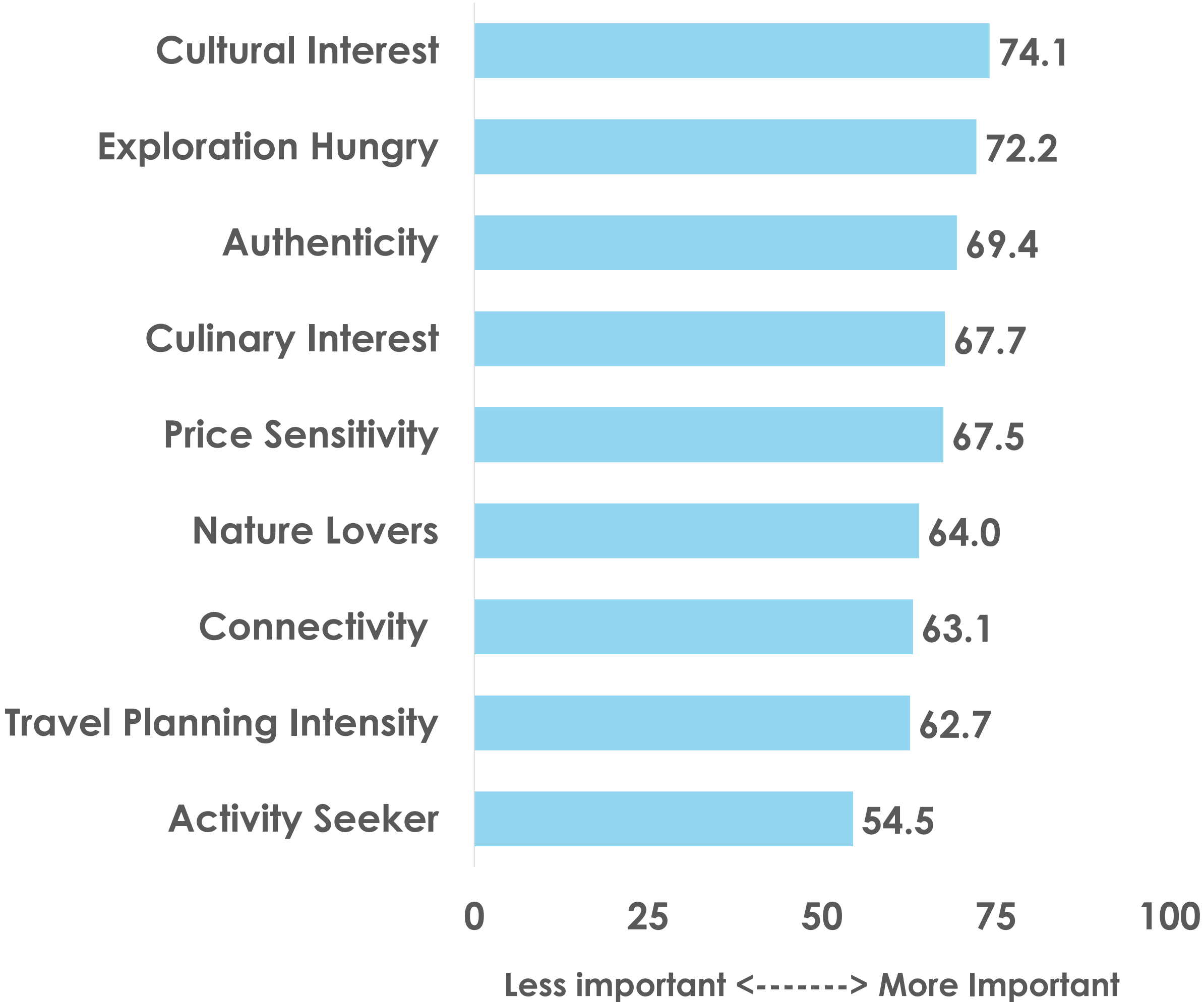
# National Parks Travelers



*Travel Planning Resources Used in Past 12 Months*



# Psychographics: National Parks Travelers





# National Parks Travelers

Travelers who have visited a National Park on a leisure trip in the past 12 Months



## Takeaways

1. Large, frequent traveling segment
2. Skew younger in age
3. Includes many family travelers
4. Hyper-informed traveler behaviors
5. Other parks are important to them
6. Defy stereotypes with interest in culture and cuisine





# Family Travelers

Travelers who have taken their own children with them on a leisure trip in the past 12 months

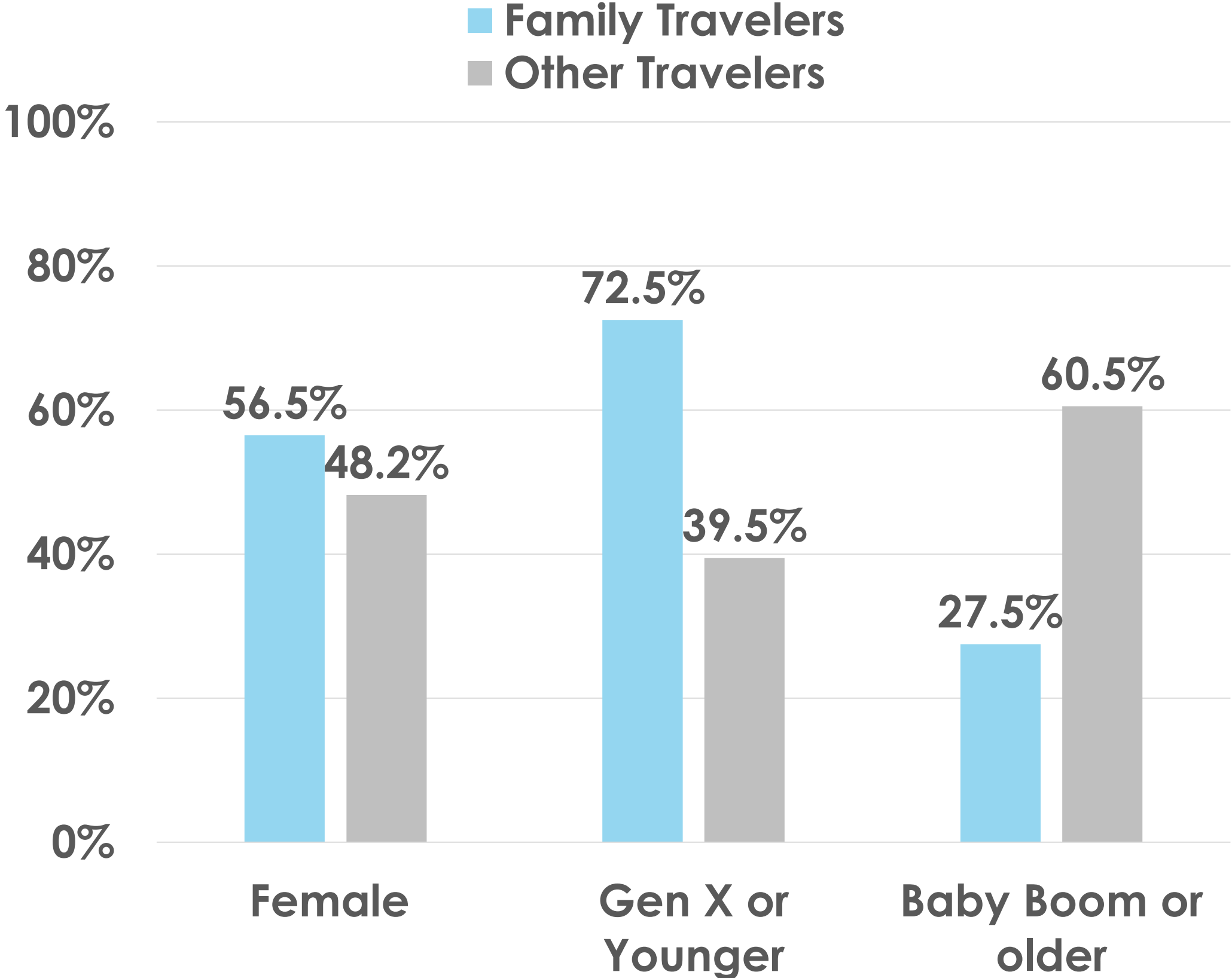
# 33.9%

of traveling adult Americans



# Demographics: Family Travelers

*Younger and skew female*



Family Travelers

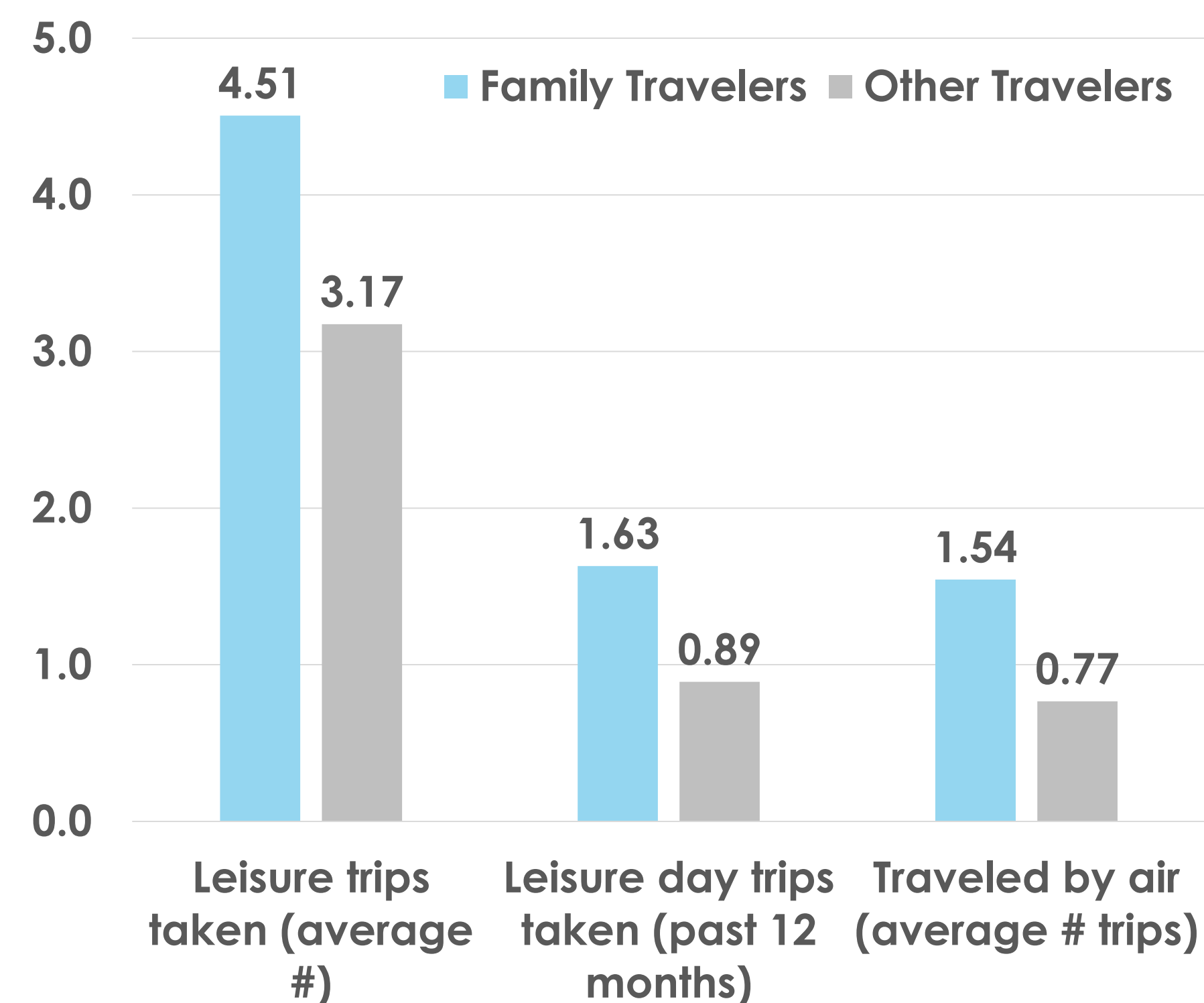
**41** Average Age

Other Travelers

**53** Average Age

# Family Travelers are Super Travelers

*Trips Taken in Past Year*



*Traveled Outside the USA*

Family Travelers

30.1%

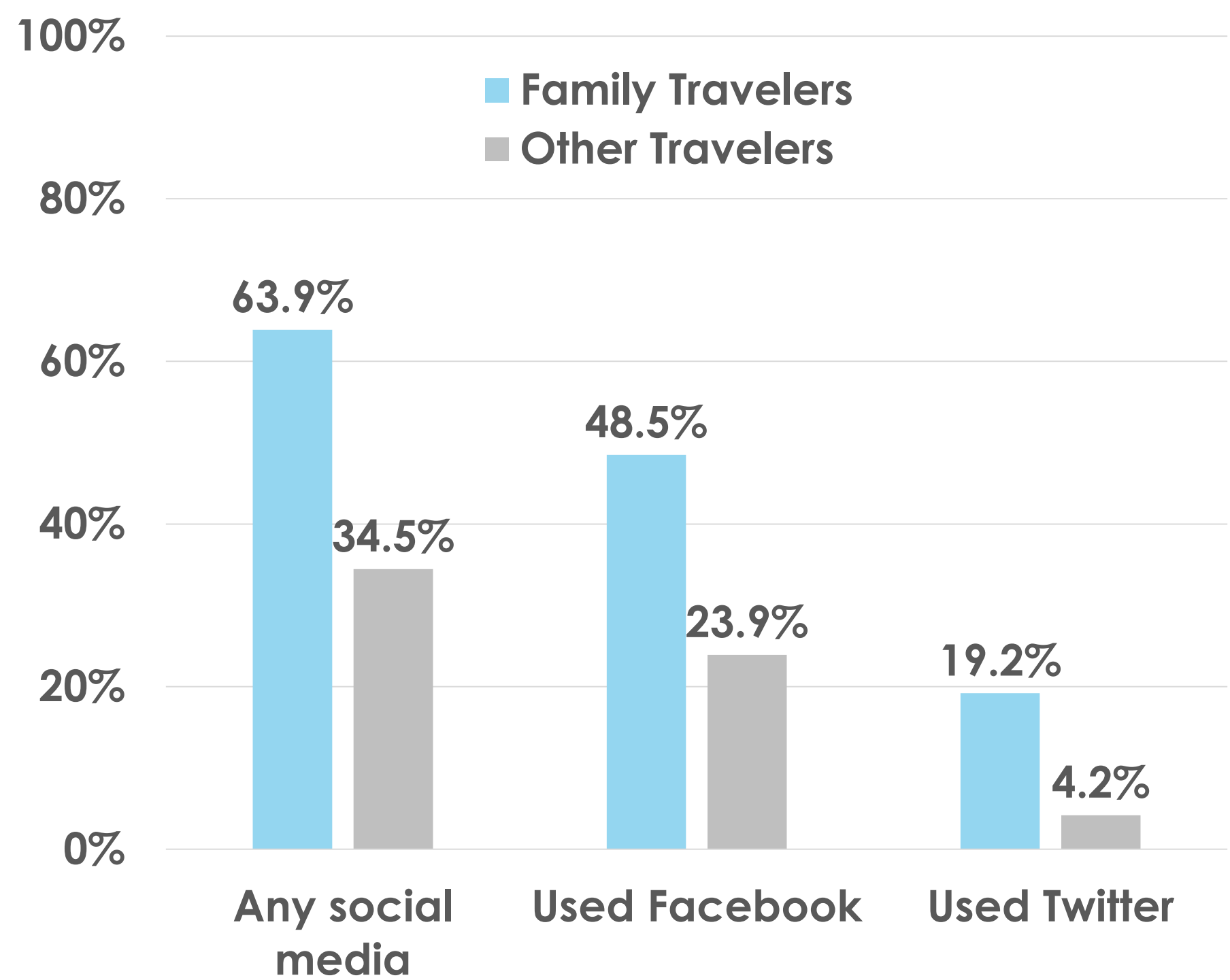
Other Travelers

15.6%

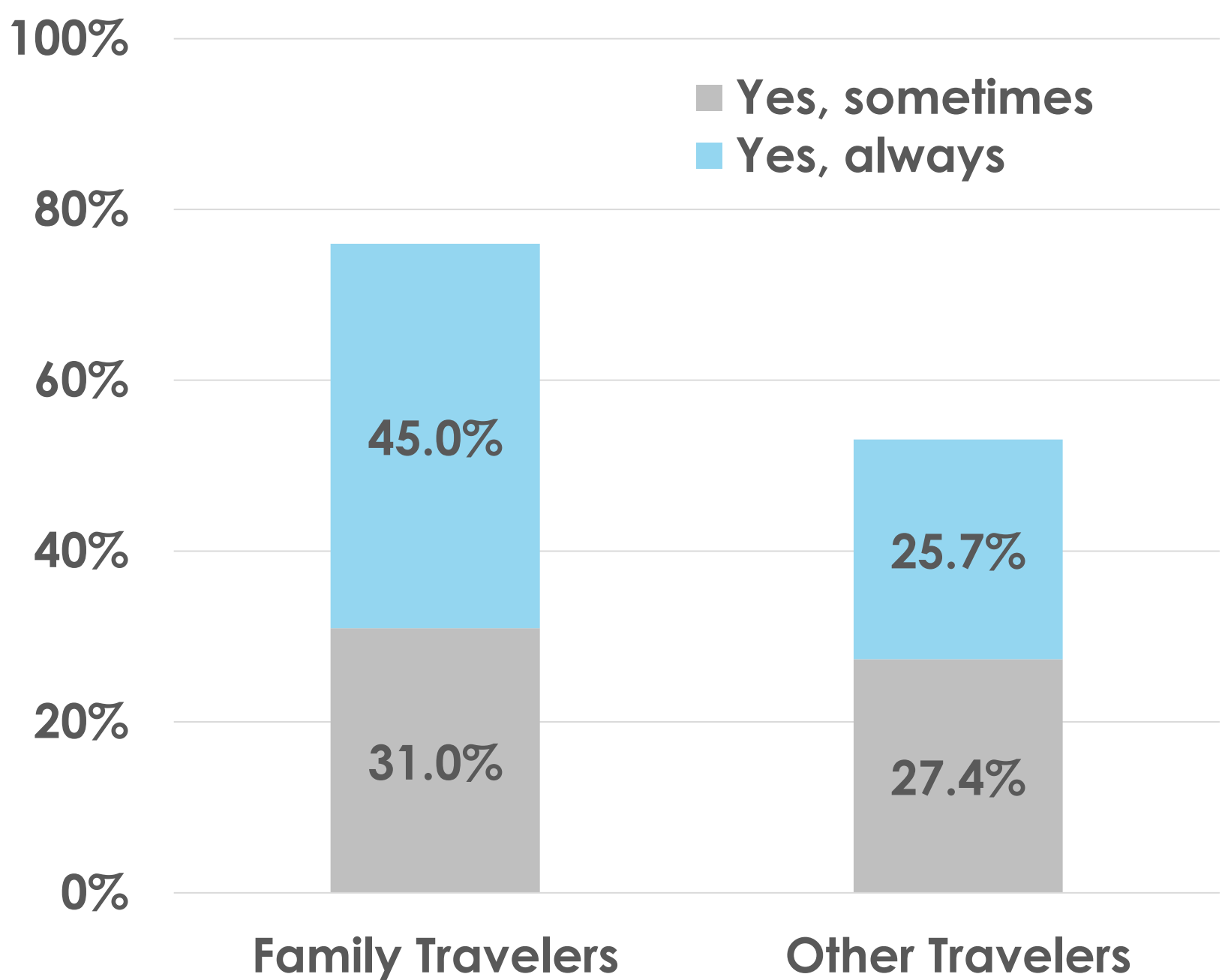


# Families are Super Social Travelers

## Resources Used in Travel Planning

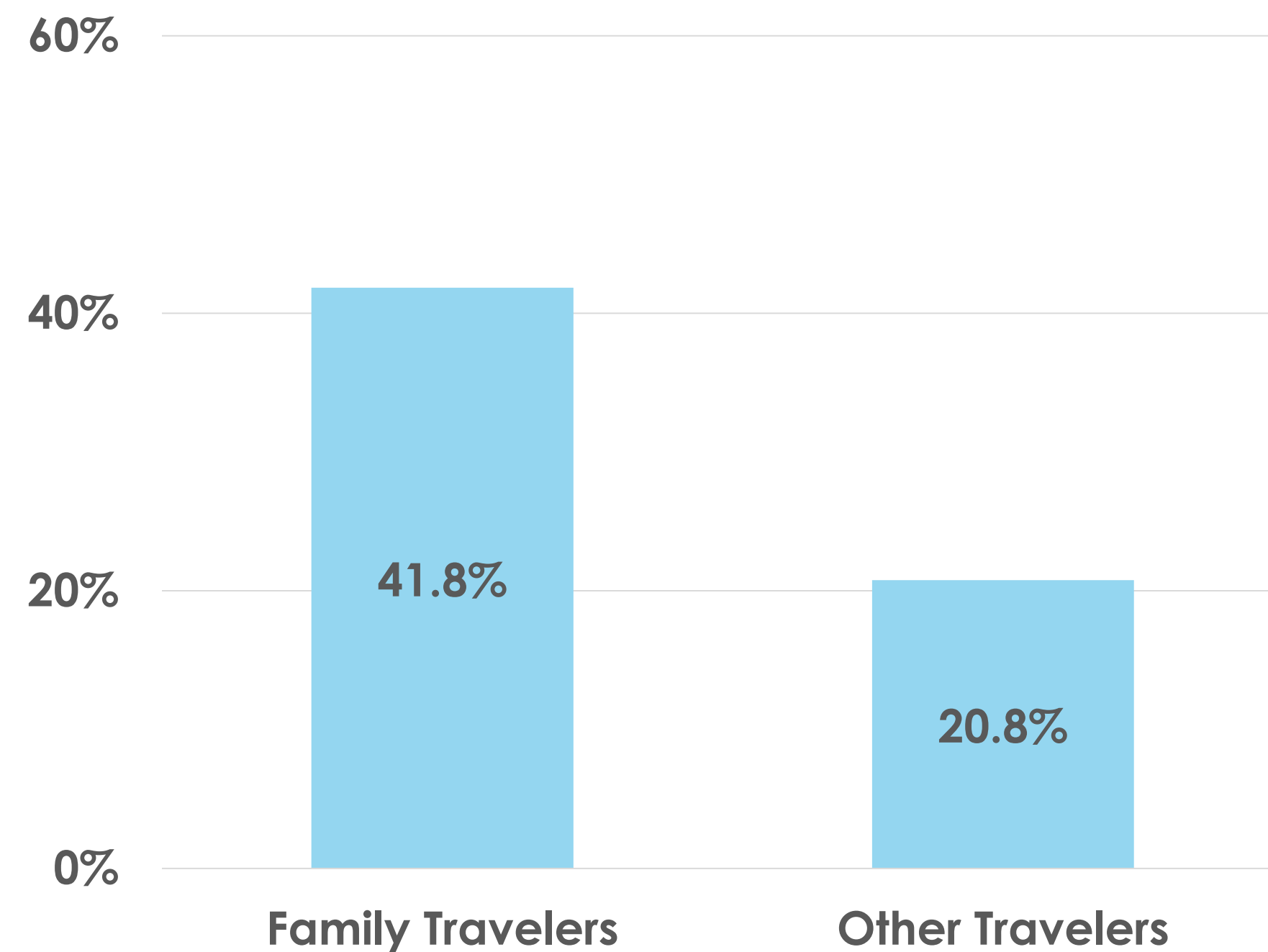


**Question:** When traveling for leisure, do you take photos/videos to share on social media?



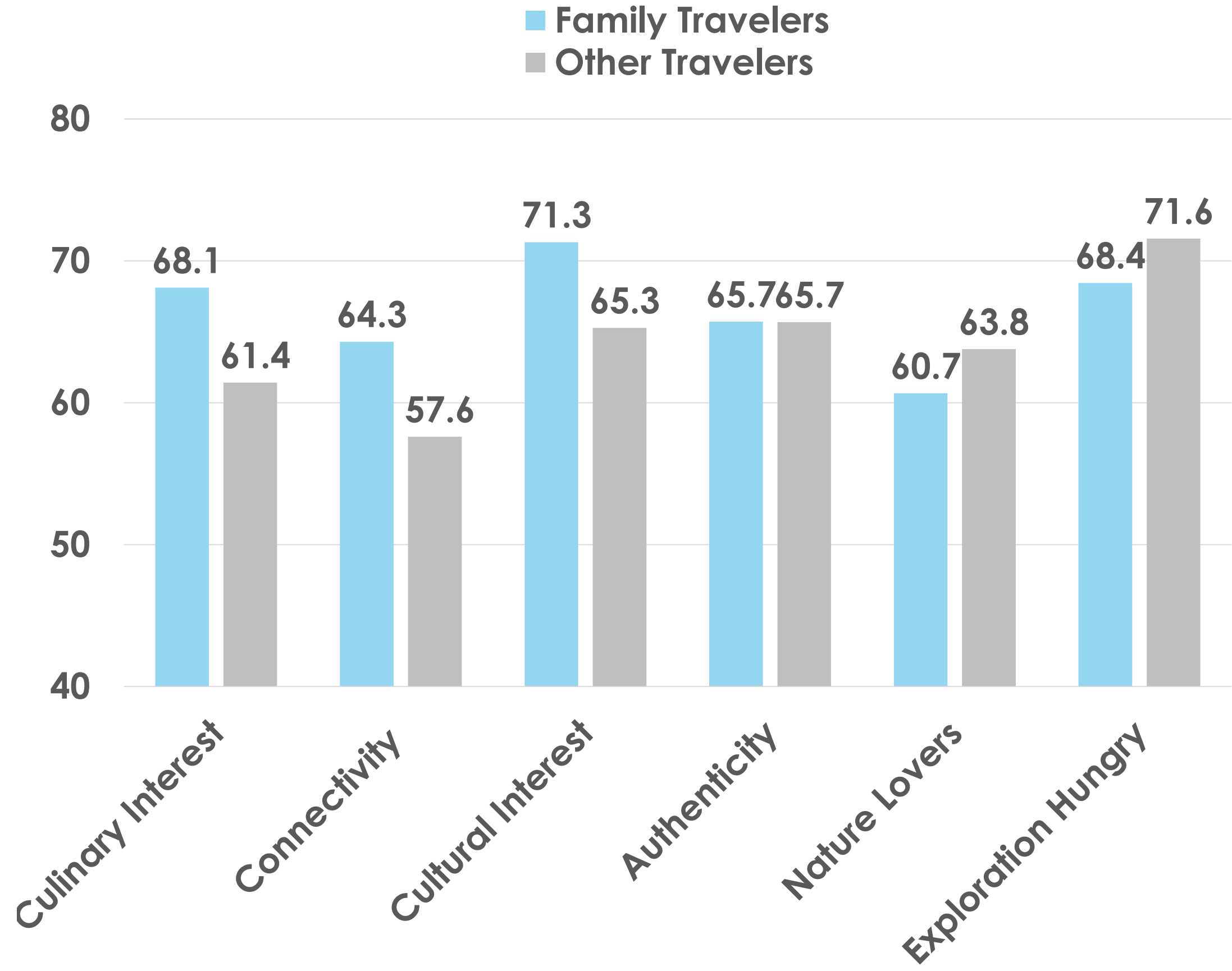
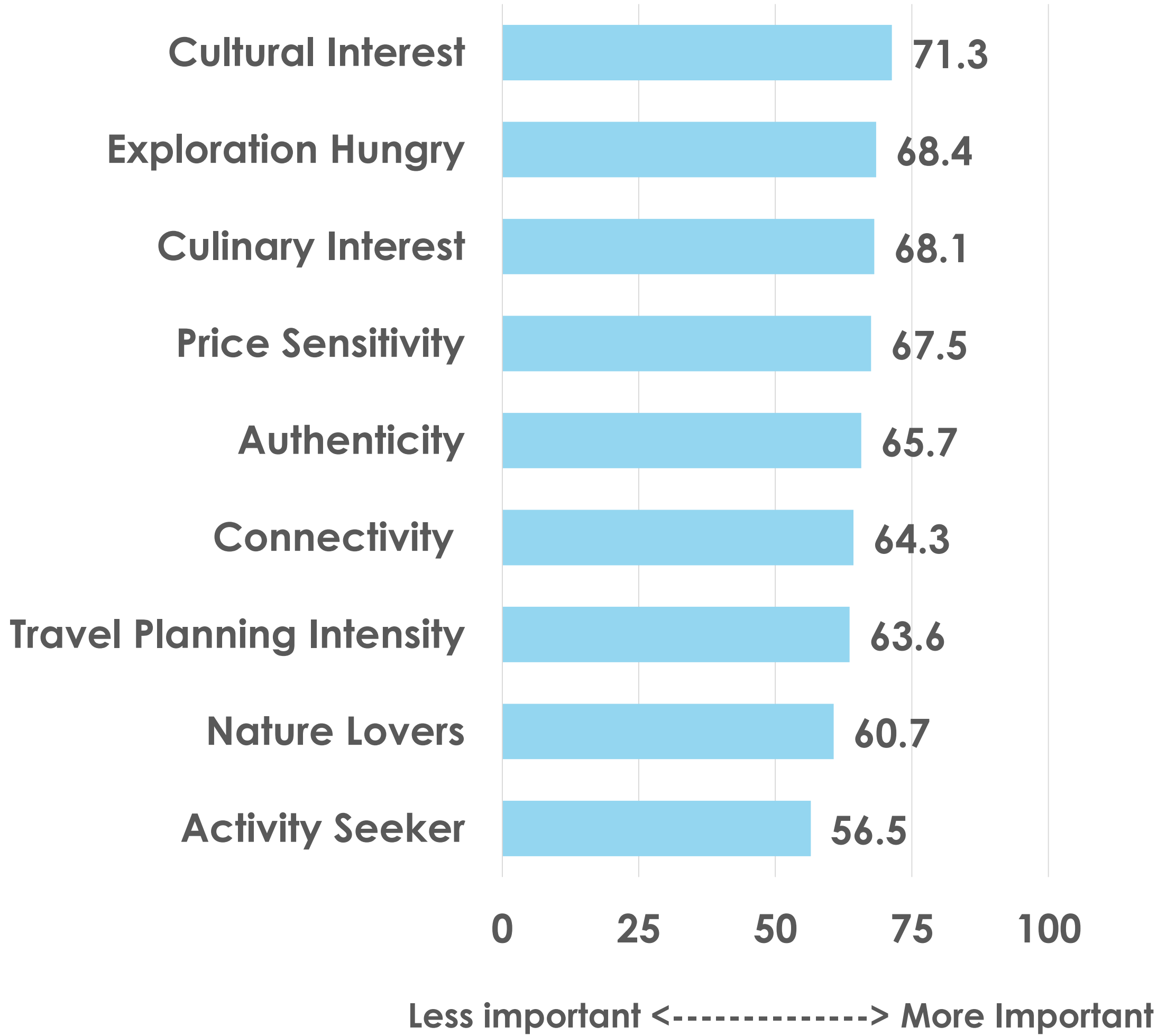
# Peer-to-Peer Lodging Mega-Consumers

## *Used in Past 12 Months*





# Psychographics: Family Travelers



# Family Travelers

Travelers who have taken their own children with them on a leisure trip in the past 12 months



## Takeaways

1. Younger
2. Heavy social media consumers/users for travel
3. Propensity to share photos and do so to influence their networks to travel
4. Peer-to-peer Mega-consumers
5. Key Psychographics: Cuisine, Connectivity and Culture





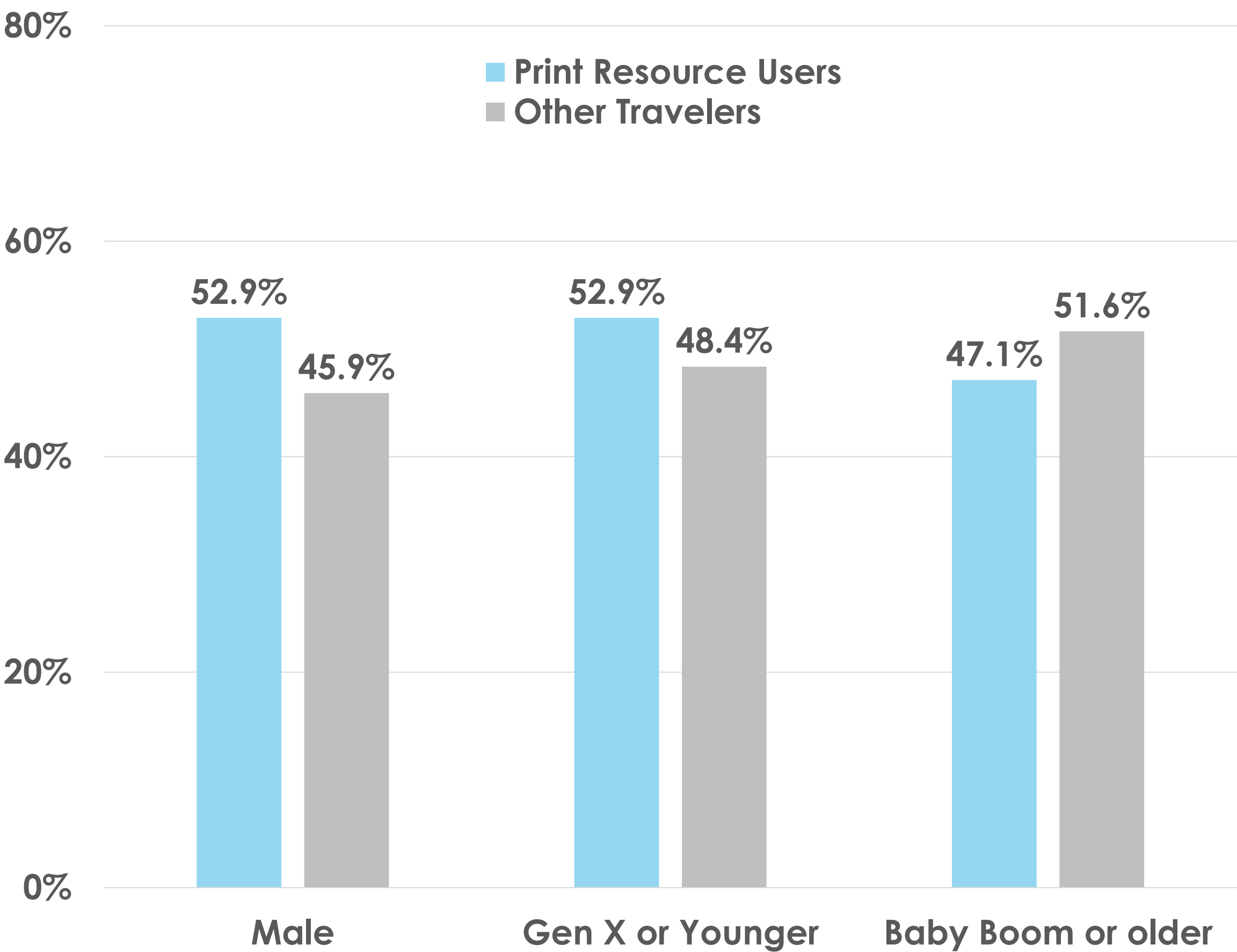
# Print Resource Users

Travelers who have used any printed travel planning resource in the past 12 months

# 44.8%

of traveling adult Americans

# Demographics: Print Resource Users



Print Resource Users

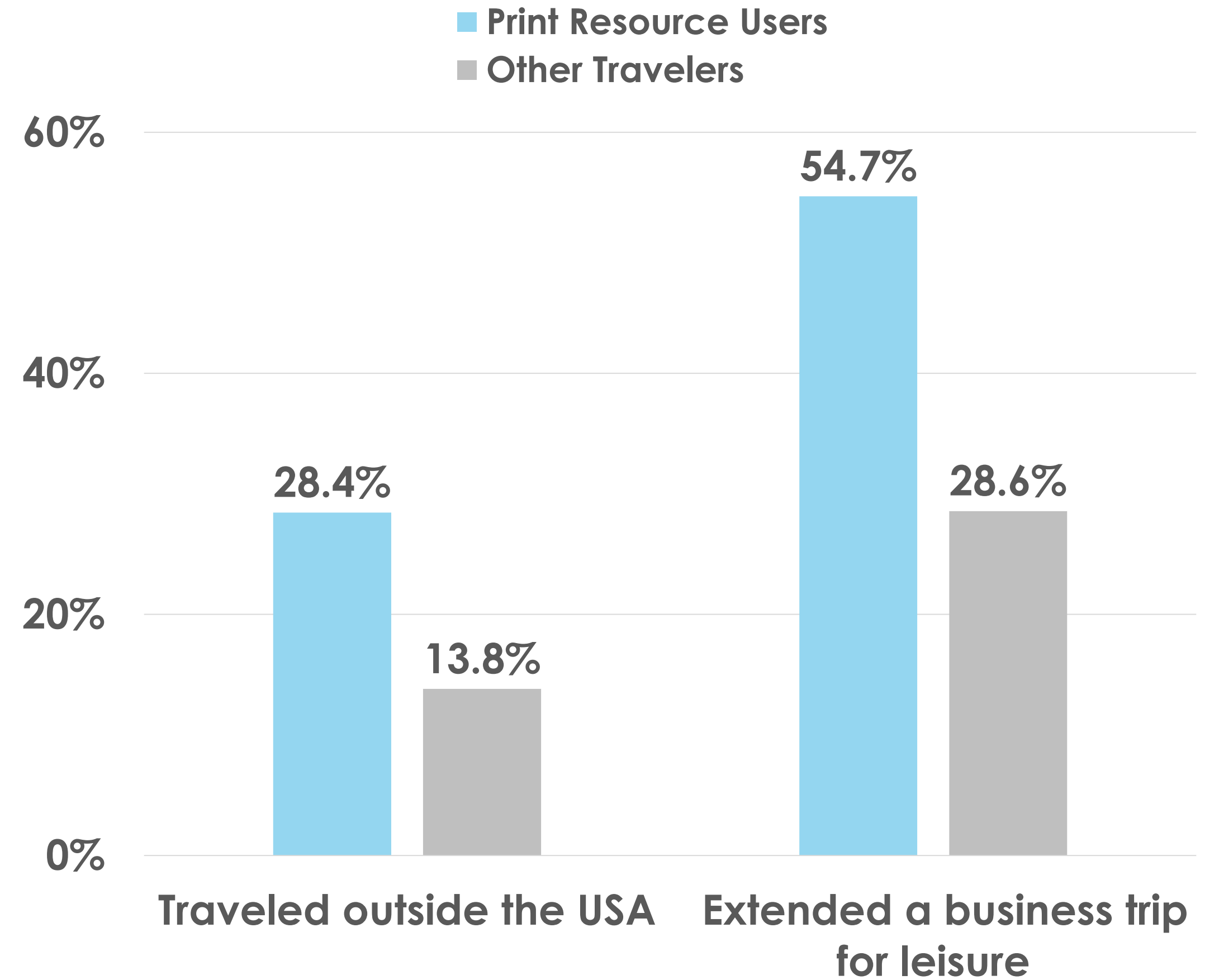
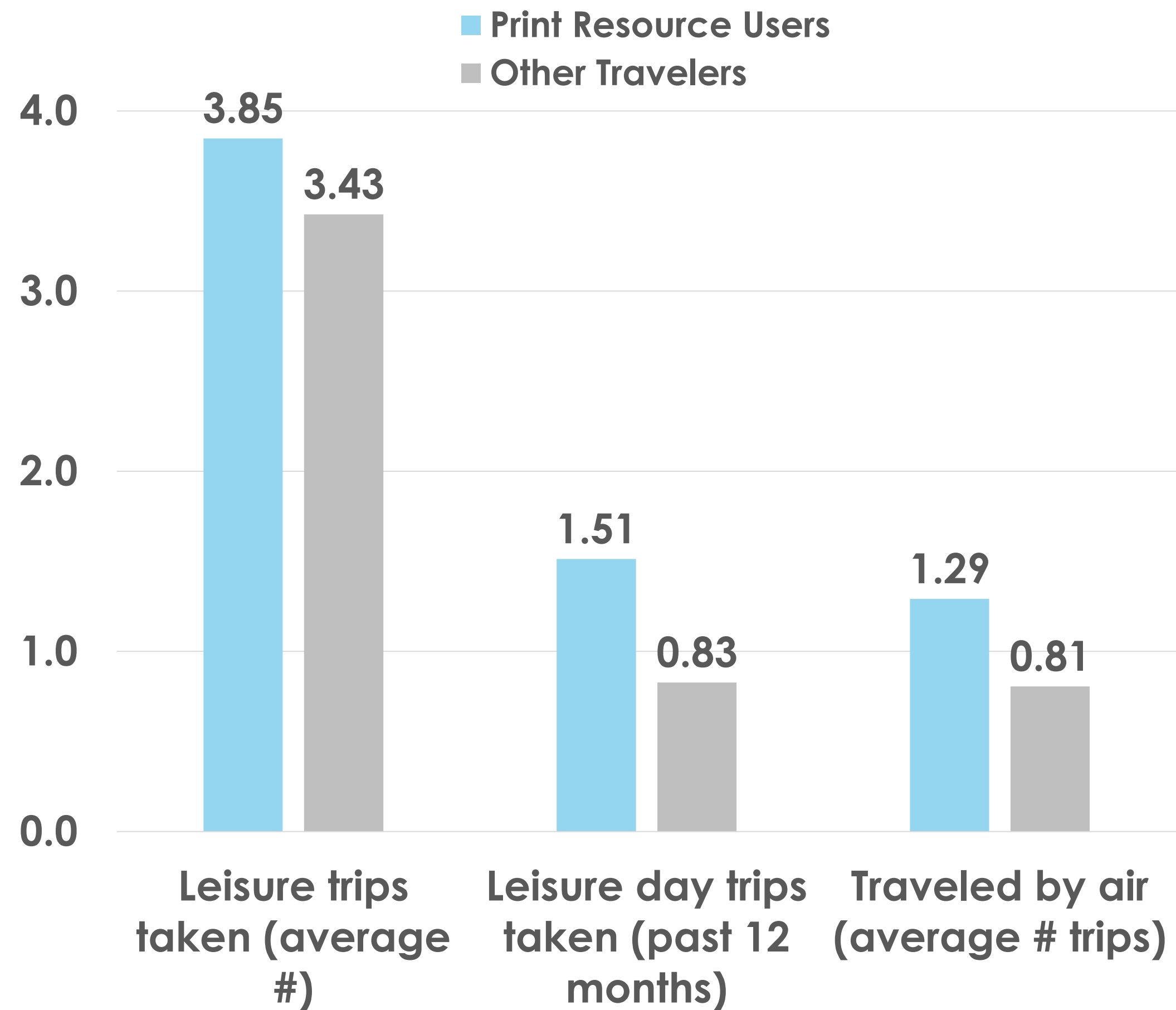
**48** Average Age

Other Travelers

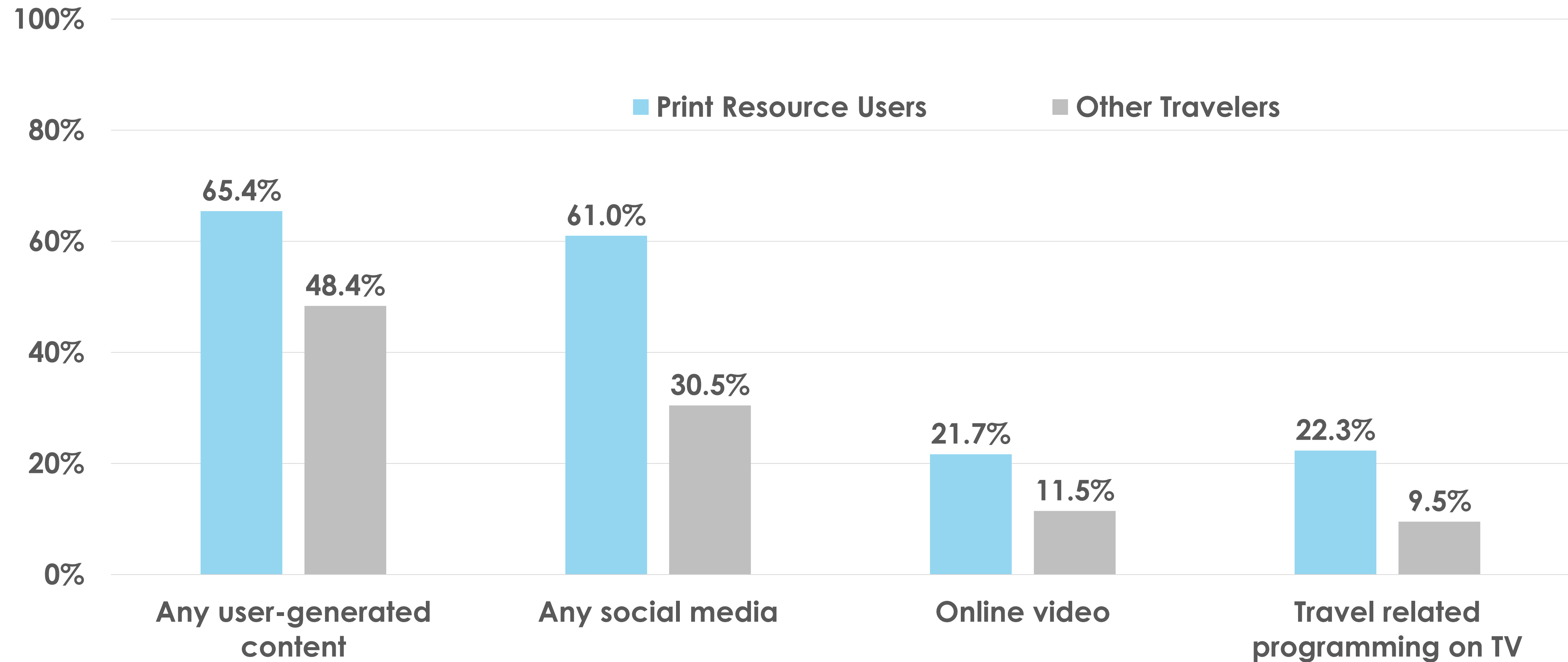
**50** Average Age



# Travel Behaviors: Print Resource Users



# Travel Planning Resources: Print Resource Users





# Print Resource Users

Travelers who have used any printed travel planning resource in the past 12 months



## Takeaways

1. The largest segment studied here
2. Skews male
3. They travel a lot, especially likely to go overseas
4. Demographically this segment is more like the norm than the other segments studied
5. Also heavy consumers of digital planning content



# Social Media-Influenced Travelers

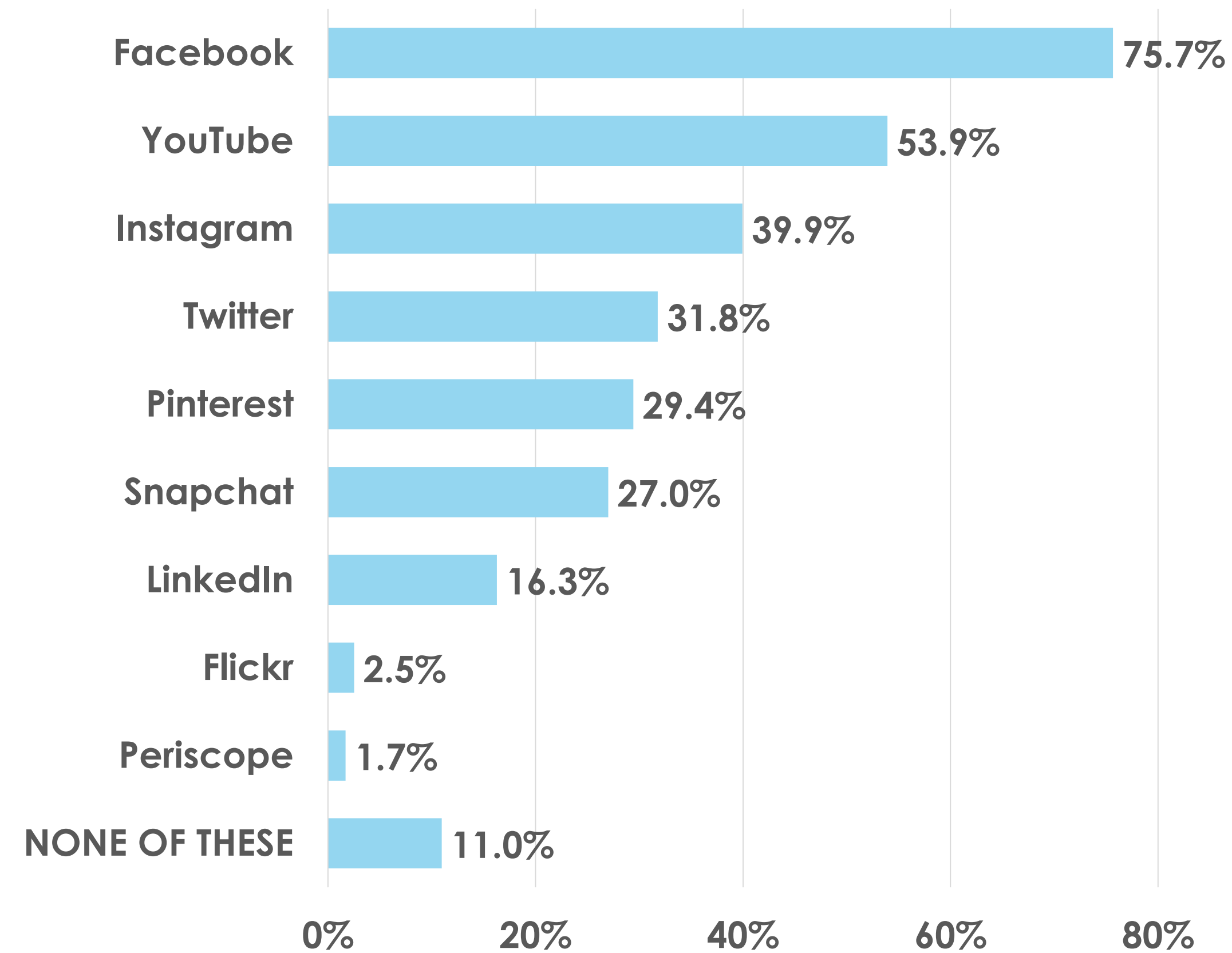
Travelers who visited a place because social media content influenced them to do so

# 17.4%

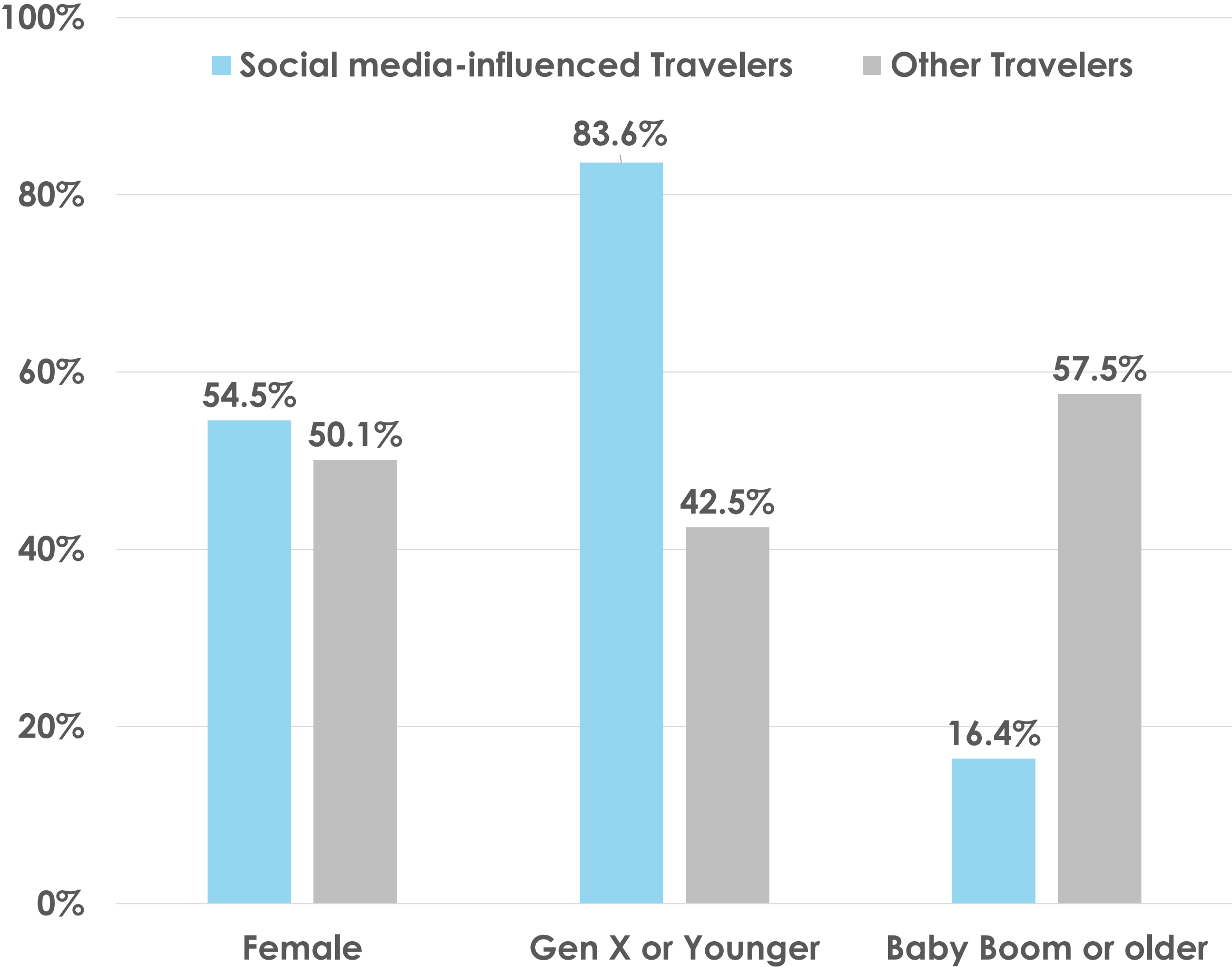
of traveling adult Americans



## Which of these social media services do you regularly use?



# Psychographics: Social Media-Influenced Travelers



Social Media-Influenced Travelers

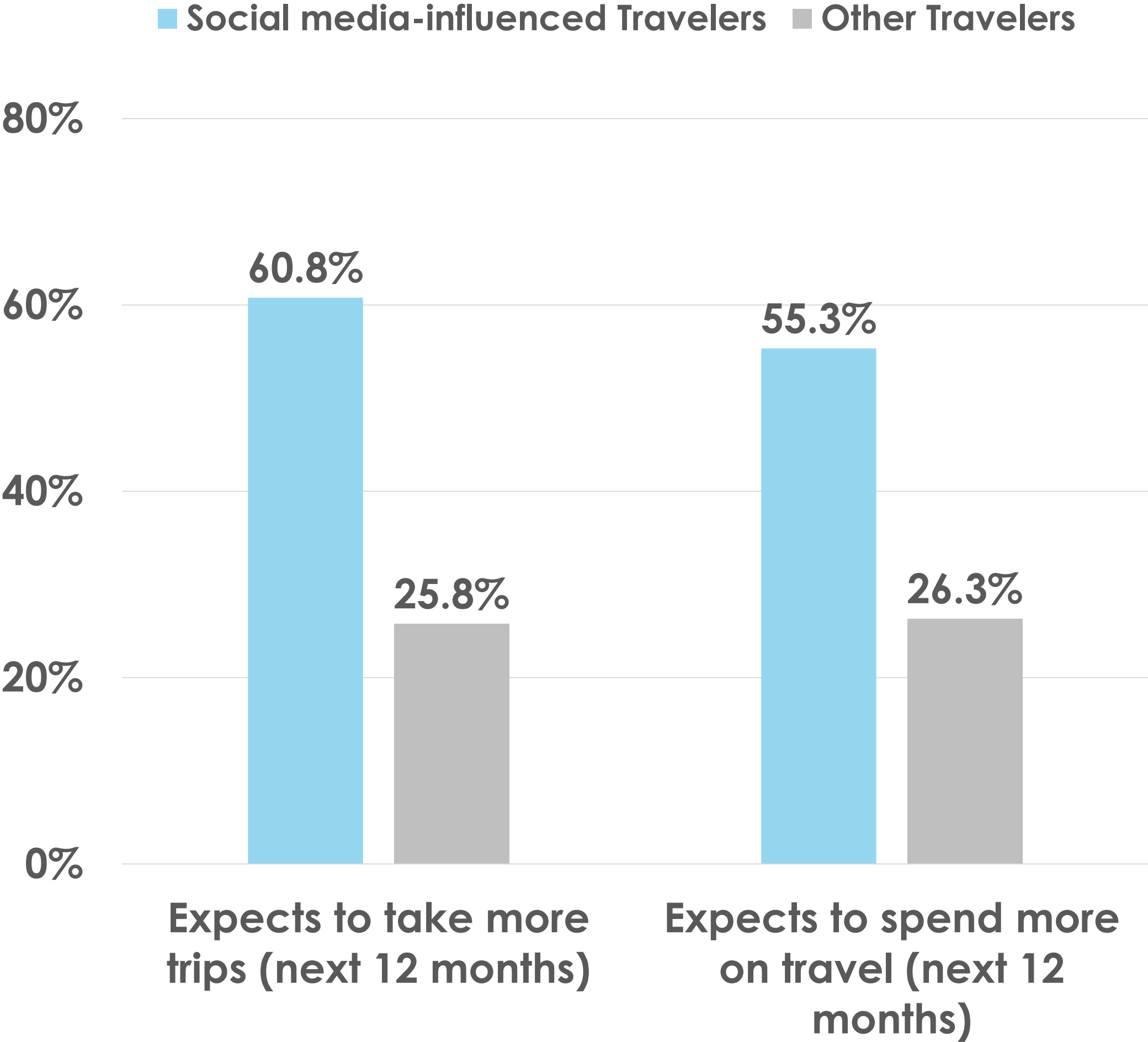
**35** years old (Avg.)

Other Travelers

**54** years old (Avg.)



# Psychographics: Social Media-Influenced Travelers



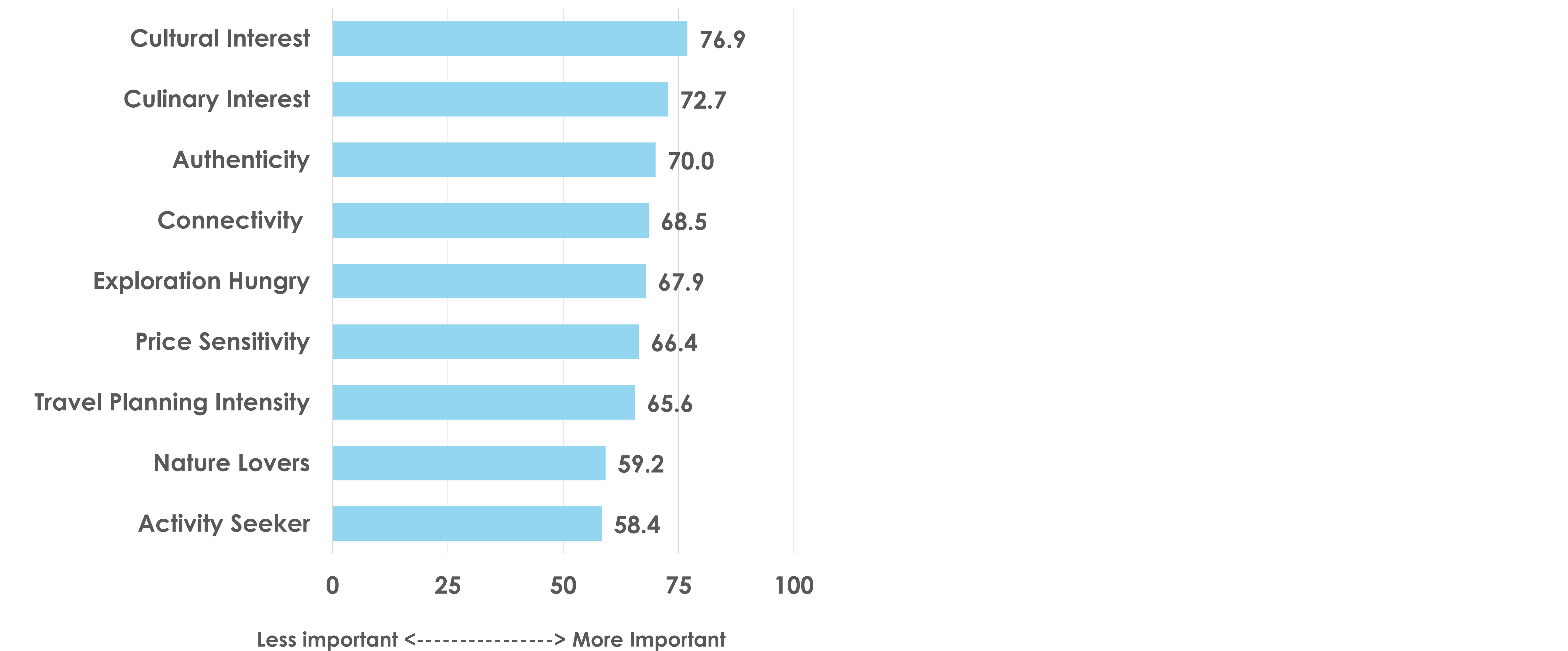
## Social Media-Influenced Travelers

**\$3,785** Max. annual  
travel budget

## Other Travelers

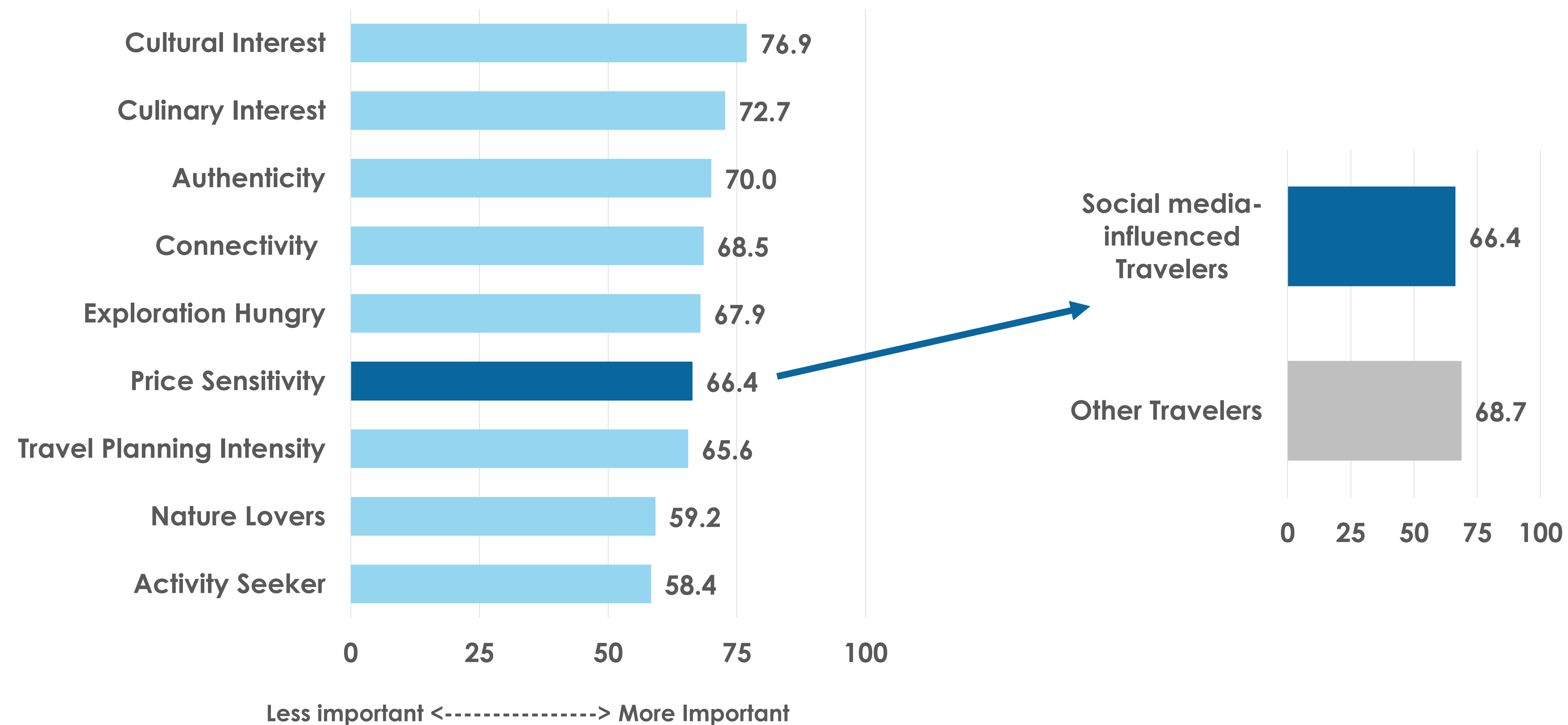
**\$2,975** Max. annual  
travel budget

# Psychographics: Social Media-Influenced Travelers

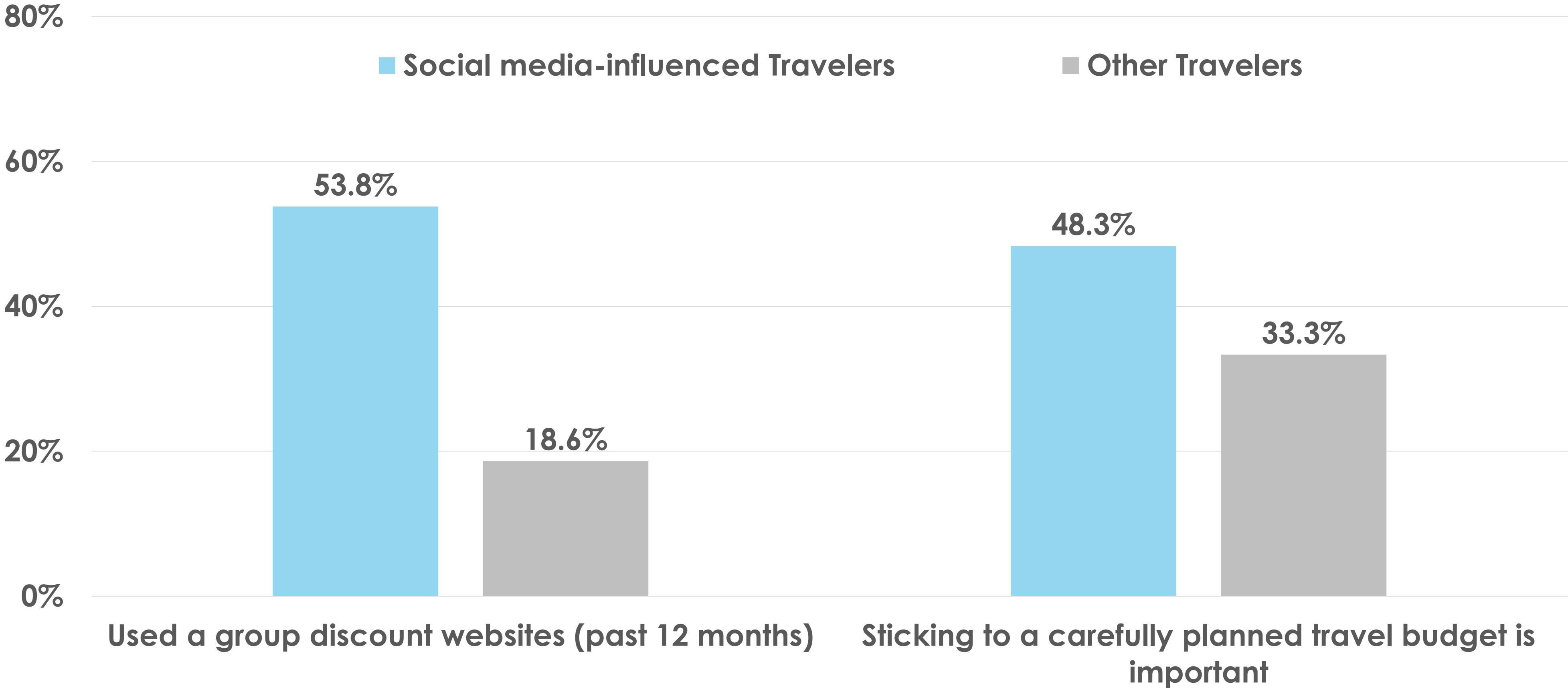




# Psychographics: Social Media-Influenced Travelers



# Psychographics: Social Media-Influenced Travelers





# Social Media-Influenced Travelers

Travelers who visited a place because social media content influenced them to do so



## Takeaways

1. Nearly one-in-five travelers
2. Young, with high travel budgets
3. Strong enthusiasm for increasing their travel
4. Not price sensitive, but interested in discounts and deals



# Bleisure Travelers

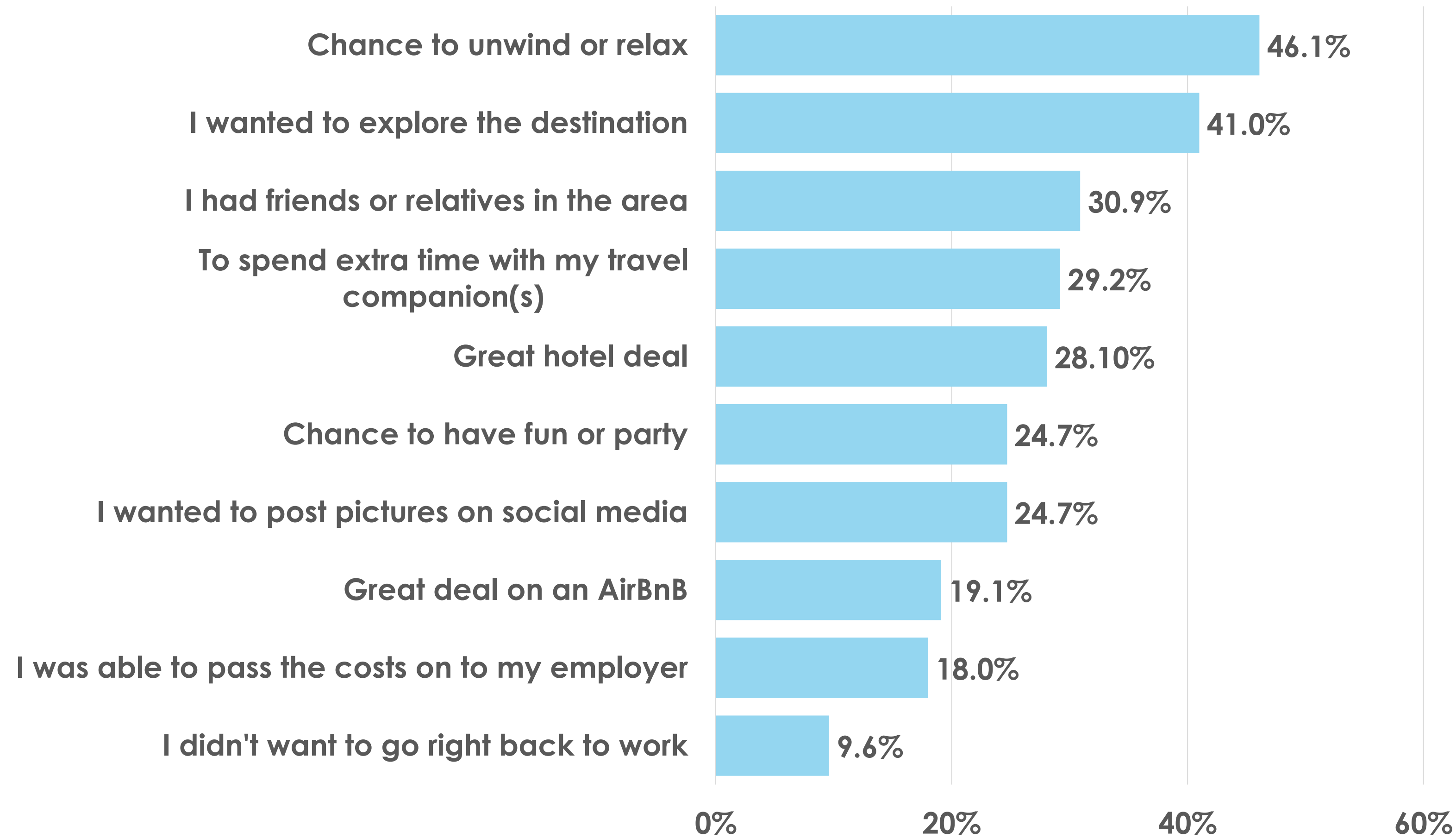
Travelers who have extended a business trip for leisure in the past 12 months

8.9%

of traveling adult Americans



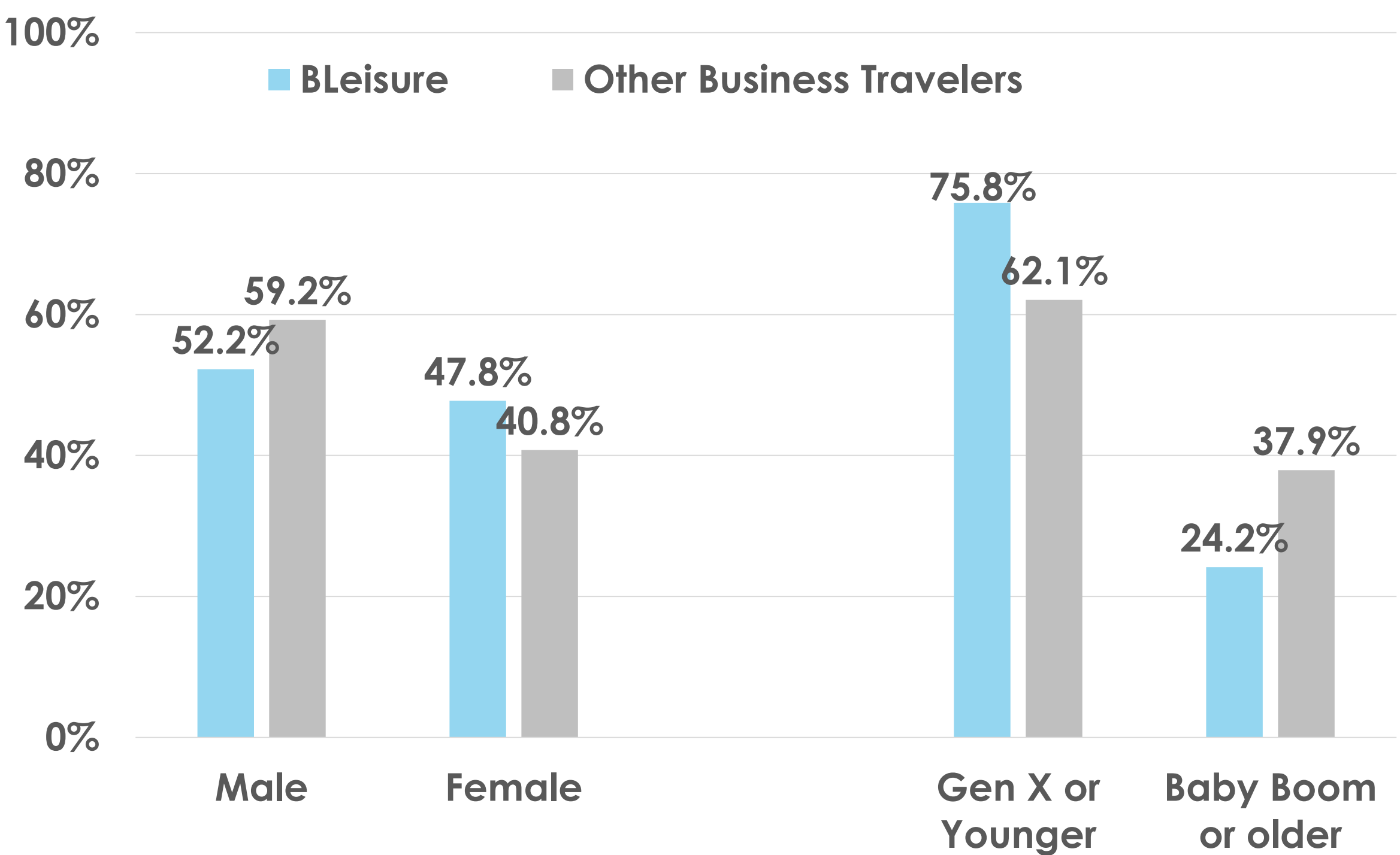
# Why They Combine Business with Leisure



**Question:** *Why specifically did you extend your business trip(s)?*

# Demographics: Business-Leisure Travelers

*Younger and less of a male skew*



Bleisure Travelers

**41** Average Age

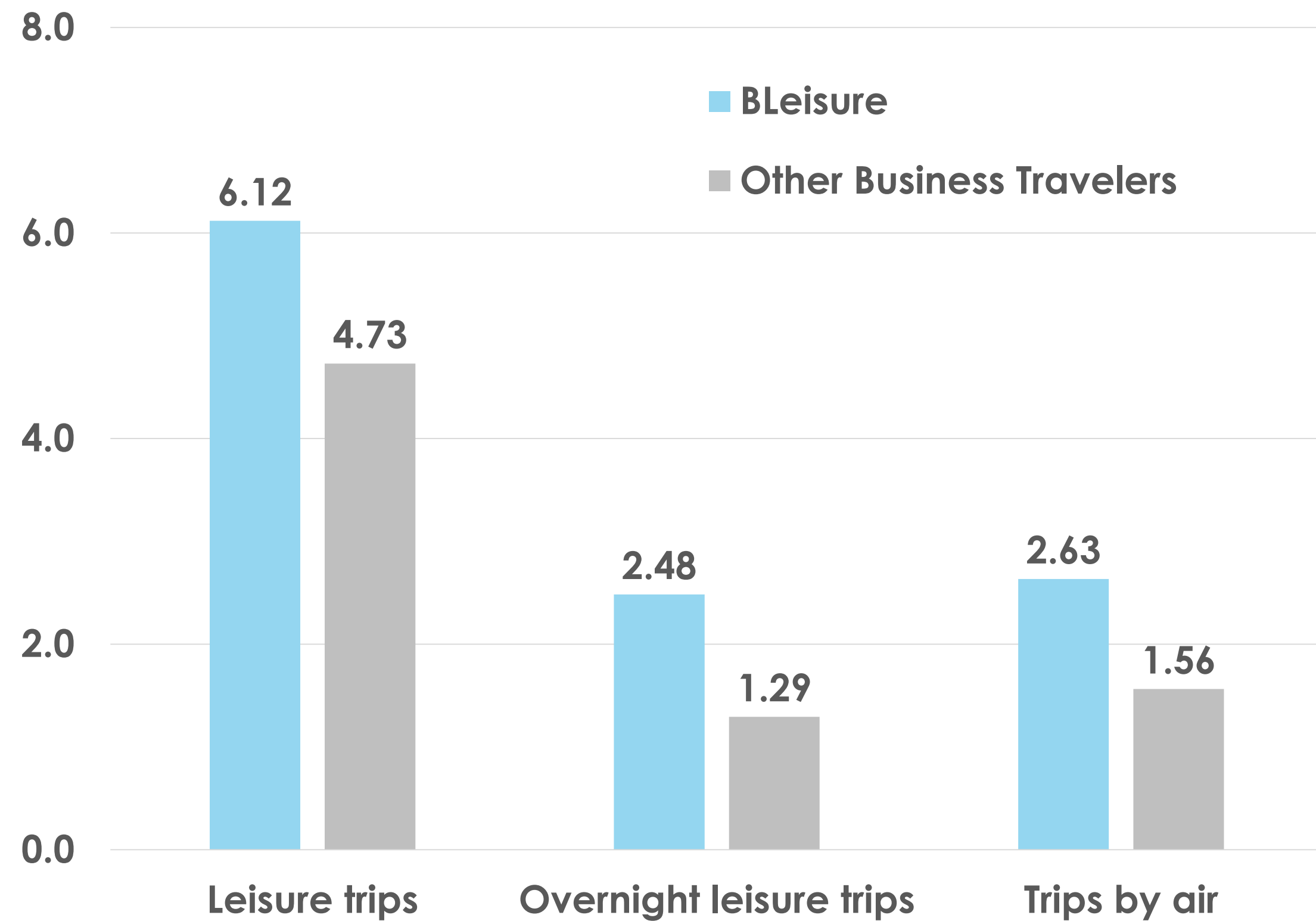
Other Business Travelers

**45** Average Age



# Travel Behaviors: Business-leisure Travelers

## Frequent Travelers – International Super Travelers



## Traveled Outside the USA

### Bleisure Travelers

60.1%

### Other Business Travelers

26.1%

# Used Social Media for Travel Planning (Past 12 Months)



Bleisure Travelers

**79.8%**

Other Business Travelers

**55.0%**



**Question:** When traveling for leisure, do you take photos/videos to share on social media? (ALWAYS)

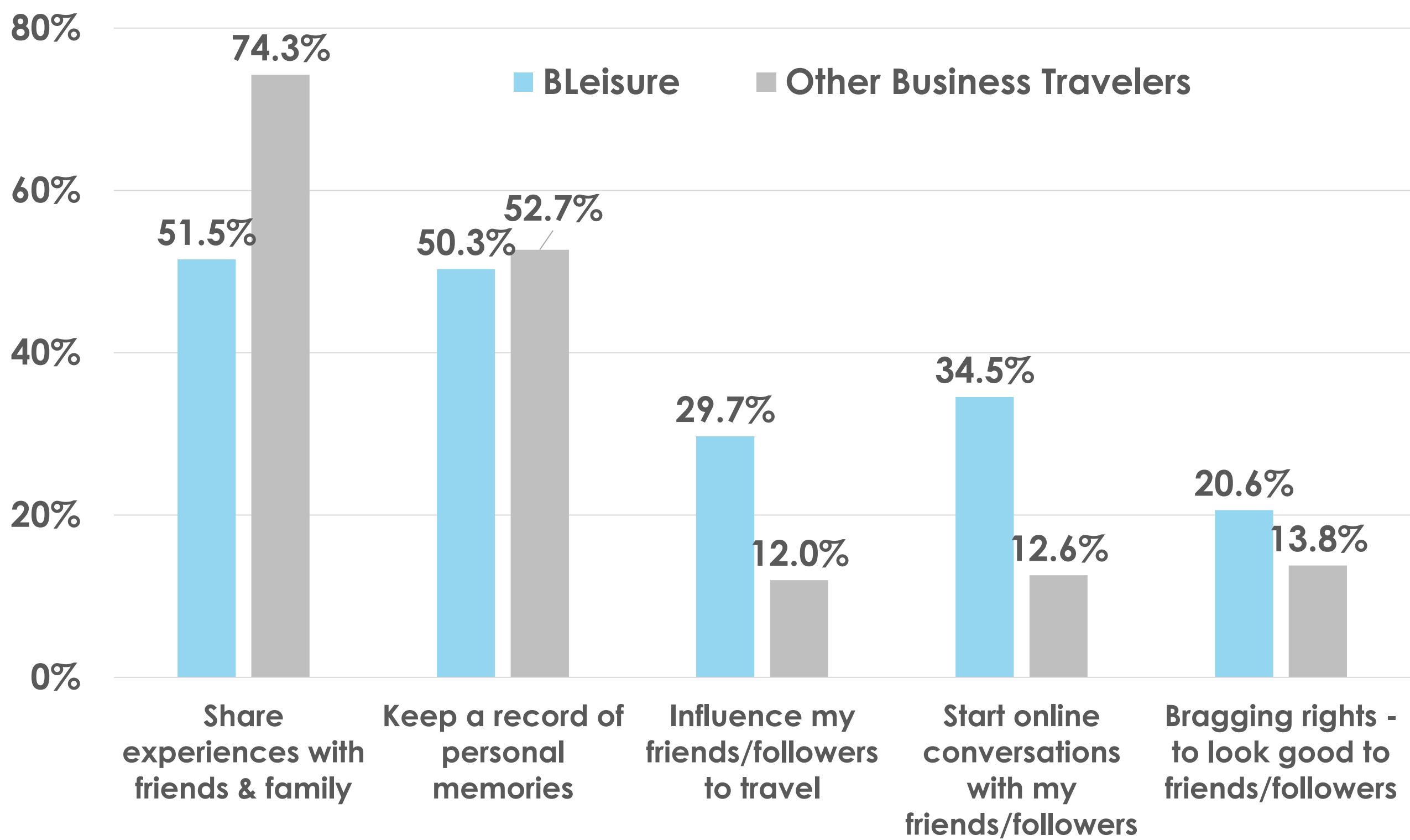
Bleisure Travelers

54.5%

Other Business Travelers

36.5%

Main Motivations for Posting Images on Social Media



# Bleisure Travelers

Travelers who have extended a business trip for leisure



## Takeaways

1. Extend trips for marketable reasons
2. International super travelers
3. Strong use of social media for travel planning
4. Motivated to post on social for different reasons compared to other business travelers





## Generation Z

Travelers between 15 and 23 years of age



## National Parks Travelers

Travelers who have visited a National Park on a leisure trip in the past 12 Months



## International Travelers

Travelers who have ventured abroad for leisure in the past 12 months



## Family Travelers

Travelers who have taken their own children with them on a leisure trip in the past 12 months





## Print Resource Users

Travelers who have used any printed travel planning resource in the past 12 months



## Social Media-Influenced Travelers

Travelers who visited a place because social media content influenced them to do so



## Bleisure Travelers

Travelers who have extended a business trip for leisure





Destination  Analysts

THANK YOU

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