

Travel Research: 2018 Travel Trends

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Executive Summary



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Executive Summary

2018 Boomer Travelers

- Boomer travelers in 2018 don't look drastically different from Boomer travelers in 2017.
 - Boomers anticipate taking 4-5 leisure trips in 2018, for which they will spend ~\$6,300 across all trips.
 - Half (49%) are making plans for domestic only travel while the other half (47%) have their sites set on both domestic and international travel.
 - Bucket list trips continue to be the focus of many 2018 international trips, while multi-generational, summer vacations, and weekend getaways are most commonly identified as the motivation for domestic travel.
- The majority of trips are still being planned and/or discussed. Only 23% of international and 13% of domestic trips have been booked thus far. That said, of those in the planning phase, as seen in the past, most (75% international, 72% domestic) have chosen their destination.
- Regarding destinations, the Caribbean/Latin America and Europe remain the most popular international destinations, while Florida and California continue to draw the most domestic vacationers.

Executive Summary

Travel Specifics

- Air travel is the most anticipated mode of transportation for Boomers, whether traveling internationally (87%) or domestically (66%). That said, the American road trip (60% personal vehicle) is a close second to air travel for domestic destinations.
- And while accommodation options have expanded in the past few years, hotels/motels are still the dominant choice for both international and domestic travel (62% each).
- There is one interesting difference among 2017 and 2018 travelers, more related to their emotional state. In 2018 there are significantly more Boomers who indicate their desire to travel is to relax and rejuvenate (49% vs. 38%) and to get away from normal, everyday life (47% vs. 39%) than what was reported in 2017.
- And perhaps that is why more working Boomers will use 'All/Most' of their vacation time in the coming year (68% vs. 59% 2017) and many are not likely to work while on the trip (44%).
- In fact, Boomers do not tend to mix business with pleasure very often. Only 25% of those employed claim to have extended a business trip in the past two years to add in some leisure time.

Executive Summary

Generational Travel Differences

- **Travel Agendas** > Millennials and GenXers are more likely to travel both domestically and internationally (64% and 59%) than are Boomers (47%). Millennials are planning significantly more international trips (2.6) compared to Boomers (1.5)
- **Motivation for Travel** > Millennials are more likely than Boomers to include the desire for adventure (27% vs. 21%), to try something new (24% vs. 15%), or to improve their health (12% vs. 2%) as motivators for travel in 2018.
- **Spend** > GenXers (\$5,434) anticipate spending less than Boomers (\$6,395) and Millennials (\$6,802) for next year's travel plans.
- **Loyalty Programs** > Although Millennials have lower levels of participation in travel loyalty programs compared to Boomers (ex: Air 65% vs. 79% enrolled) those who are enrolled are significantly more loyal to the programs than are Boomers (ex: Air 83% vs. 76% 'Always/Mostly' book through them).

Executive Summary

Generational Travel Differences (continued)

- **Work & Play >** One of the more distinct differences in the generations is in their approach to work and vacation, among those who are employed.
 - Millennials are significantly more likely to be using ‘All/Most’ of their vacation time in 2018 (79%) compared to Boomers (68%).
 - However, they are also more likely to bring work with them, as are GenXers (74% Millennials, 65% GenXers, 56% Boomers), as 47% of Millennials feel it is ‘Extremely/Very’ important for them to stay engaged with work while out compared to just 16% of Boomers who feel the same.
 - And perhaps the younger generation are just better at mixing work with pleasure as twice as many Millennials (53%) have added leisure time to a business trip in the past two years compared to Boomers (25%).

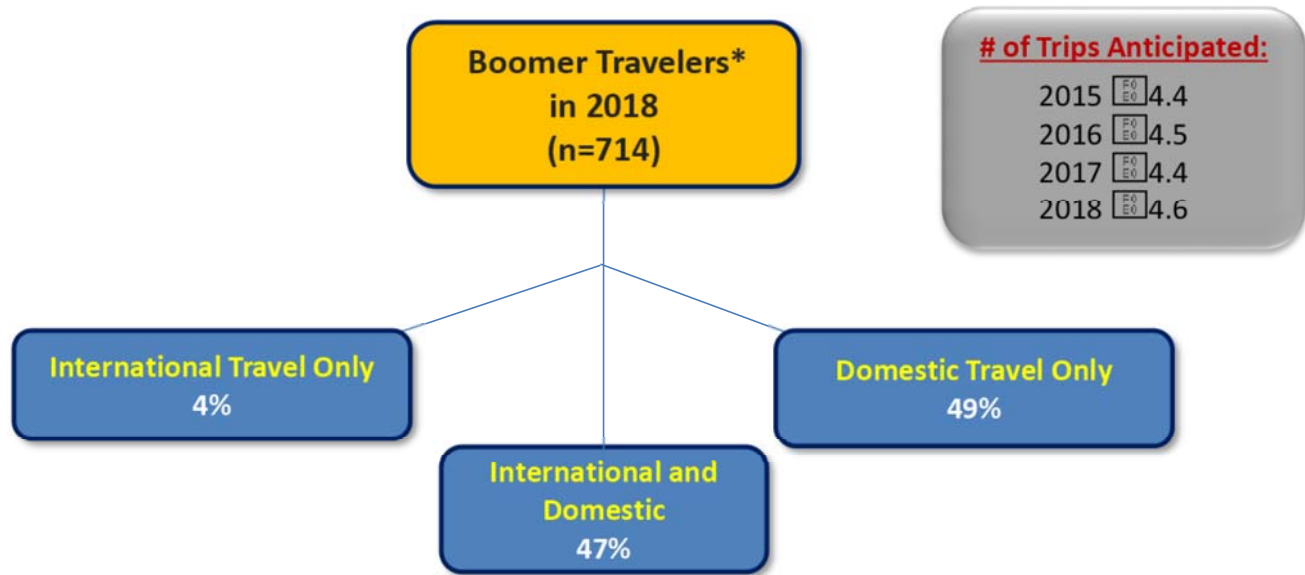
Detailed Findings: Sizing The Audience



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2018 Boomer Travel Audience

- As seen in past years, a significant portion of Boomers anticipate taking both a domestic and international trip in 2018. The total number of trips they are hoping to take has not changed year over year, rounding out between 4 and 5.



* Traveler defined as one who has taken a leisure trip in the past 2 years and anticipates taking at least one in the coming year (2018).

S11: And finally, how many personal trips do you anticipate taking next year, in the calendar year of 2018? Base: Screener, Baby Boomers (53-71) Travelers (n=714)

Q1a: How many of these trips will be international and how many will be domestic? Base: 2018 Baby Boomer Travelers (n=714)

Audience Profiles

- Overall, the composition of Boomers does not change dramatically based on their travel destinations.
- Boomers who anticipate traveling domestically and abroad in 2018 have only slight differences in their demographic composition compared to domestic only travelers.
 - World travelers skew male, have a higher average income, and are more likely to be married than those who only plan on traveling domestically next year.
- The single/never married Boomer is more likely to travel domestically in 2018 than internationally.

Audience profiles are very similar 2015, 2016, 2017, 2018.

2018 Baby Boomer Traveler Audience Profiles			
	International Only Traveler	Domestic Only Traveler	International & Domestic Traveler
Base:	28 **	347	339
AARP Membership	(a)	(b)	(c)
Member	46%	57%	59%
Non-Member	54%	43%	41%
Gender			
Male	36%	44%	52% b
Female	64%	56% c	48%
Age			
53-59	28%	34%	34%
60-69	55%	51%	51%
70+	17%	15%	15%
Ethnicity			
Caucasian/Other	78%	77%	76%
African American	6%	12%	9%
Hispanic	6%	8%	11%
Asian American	10%	3%	4%
Income			
Average	\$101K	\$86K	\$107K b
Marital Status			
Single/never married	11%	8% c	4%
Married/living together	75%	72%	81% b
Divorced/separated	6%	13%	12%
Widow	8%	6%	3%

Letters denote a significant difference between travel segments

** Caution: low base size

Top Motivators for Travel

- While the motivation to travel continues to stem from the same three drivers, in 2018, there are significantly more travelers indicating the desire to use travel to relax and get away from everyday life, than what was indicated in 2017.

Beyond the top three, some interesting differences in motivation exist by generation, please reference the Appendix for generational slides.

2017 Trip Motivators:

1. Spend time with family/friends (57%)
2. Get away from normal everyday life (39%)
3. Relax & rejuvenate (38%)



Base: 2018 Baby Boomer Travelers (n=714)

Q9b: Please select your top three motivators for choosing the destination for this trip.

Detailed Findings: Travel Plans

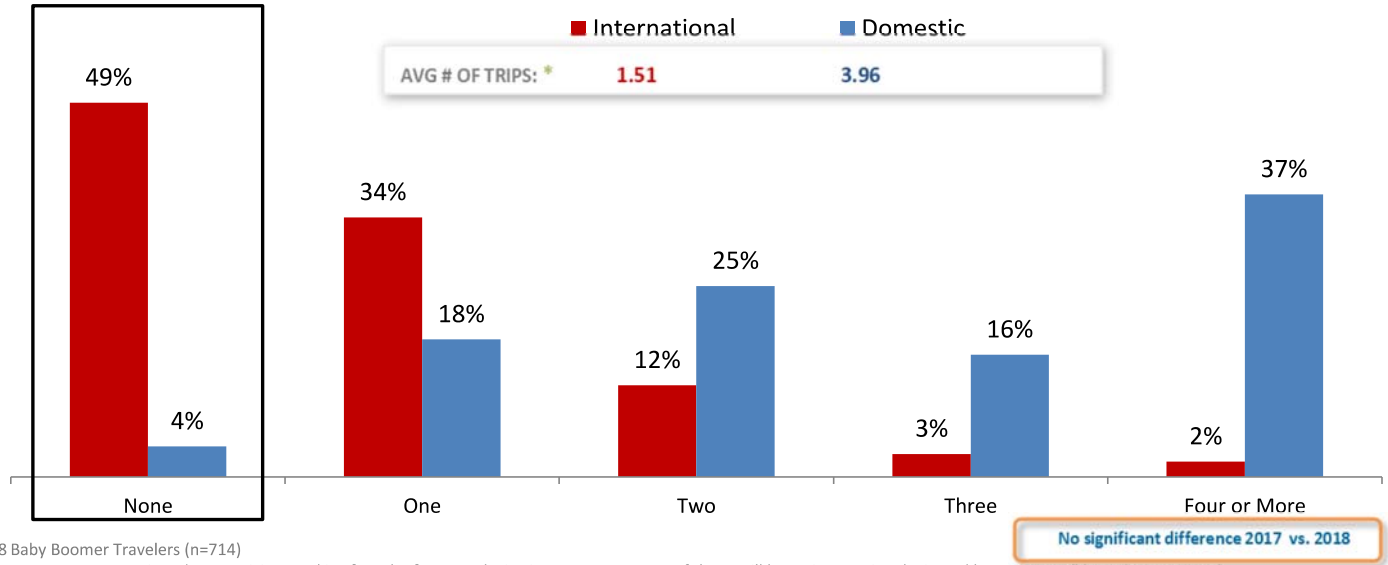


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Number of Trips Anticipated

- Almost all Boomer travelers (96%) anticipate at least one domestic trip in 2018, while just over half (51%) indicate plans for international travel.
- On average, Boomers will take five leisure trips in 2018.
 - Overall, Millennials anticipate taking more trips in 2018 than Boomers, citing 6 trips in total. While the number of domestic trips remains relatively the same across ages, it is the higher number of international trips among Millennials (2.6) that pushes their total trips higher.

Number of Trips Anticipated By Destination



Base: 2018 Baby Boomer Travelers (n=714)

Q1a: A moment ago you mentioned you anticipate taking [number] personal trips in 2018. How many of these will be an international trip and how many will be a domestic trip?

* Among those taking one or more trips

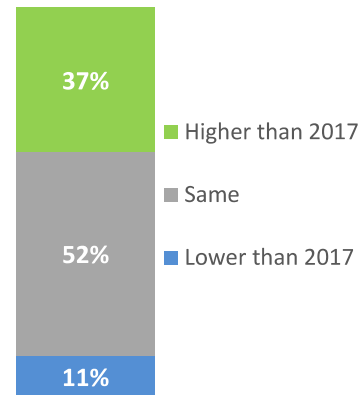
2018 Travel Spend Anticipated

- Boomers plan to spend more than \$6,000 on travel in 2018, with more than one-third estimating they will spend more in 2018 than they did in 2017.

Anticipated Total Spend 2018 Travel



Spend Compared to 2017



Base: 2018 Baby Boomer Travelers (n=714)

Q13d. Now that you have thought through your anticipated travel plans for 2018, approximately how much do you expect to spend on travel in 2018, in total?
Q13e. And how does ... compare to your travel expenditures in 2017?

New Questions Added 2018

Types of International Trips

- Of the trips planned for 2018, Bucket List are mentioned most often among Boomers.
- The other trip types that account for almost 50% of all Boomer travel plans are summer vacations, multi-generational trips, romantic getaways, celebration vacations and solo travel.
- GenXers have similar trip type aspirations to Boomers with the exception of far less focus on Bucket List Trips (13%).
- Millennials have little interest in Bucket List Trips (6%), but indicate a wide variety of trip types anticipated in 2018 instead.



Composition of Planned Trips

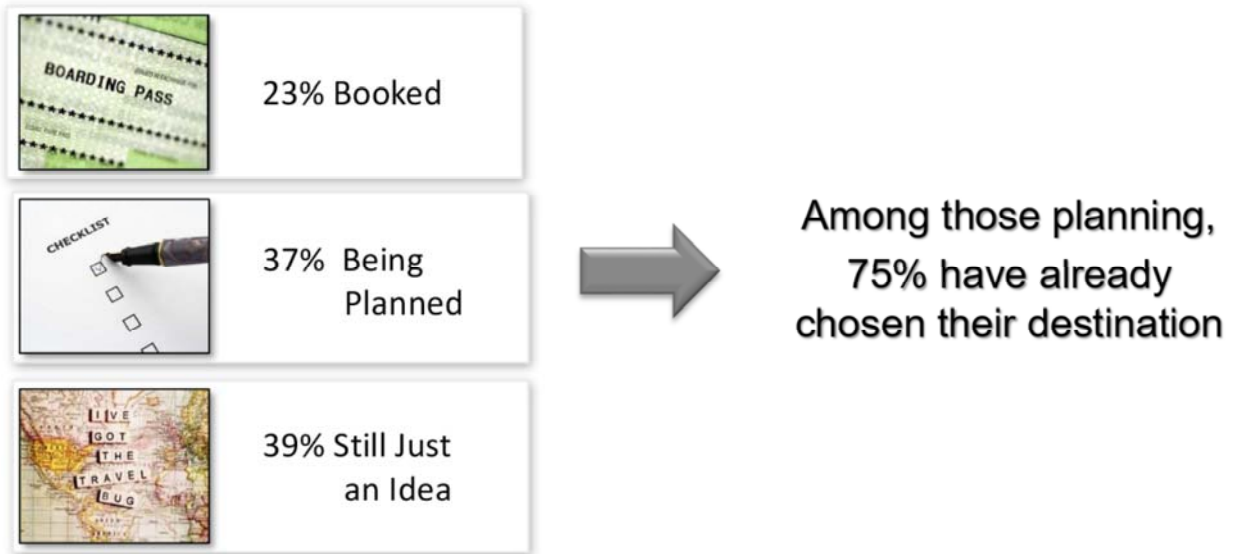
Bucket List	22%	} 46%
Summer Vacation	9%	
Multi-Generational	9%	
Romantic Getaway	10%	
Celebration Vacation	9%	
Solo Travel	9%	} 20%
Family Reunion	4%	
Weekend Getaway	3%	
Adventure Travel	3%	
Girls Getaway	2%	
Holiday Travel	2%	
Obligation/Required	2%	
Wedding/Graduation	1%	
Spring Break	1%	
Guys Getaway	1%	
Heritage Trip	1%	
Food Focused Trip	1%	
Other	12%	

Base: Baby Boomer International Trips in 2018 (n=548); Data based on Total Responses, up to 5 trips discussed Q2/Q2d: For the international trips you plan on taking next year, please read the list of trip types below and select your primary motivation for EACH trip.

* Denotes a significant difference between generations

Commitment to International Travel

- While a majority are still planning or dreaming about their 2018 trips, more Boomers have actually booked their travel by September 2017 (23%) than those in 2016 (17% had booked 2017 travel).
 - Millennials are more likely to state they are in the planning phase (57%) versus the idea phase (26%) when compared to Boomers.



Base: Baby Boomer International Trips in 2018 (n=548) Data based on Total Responses, up to 5 trips discussed

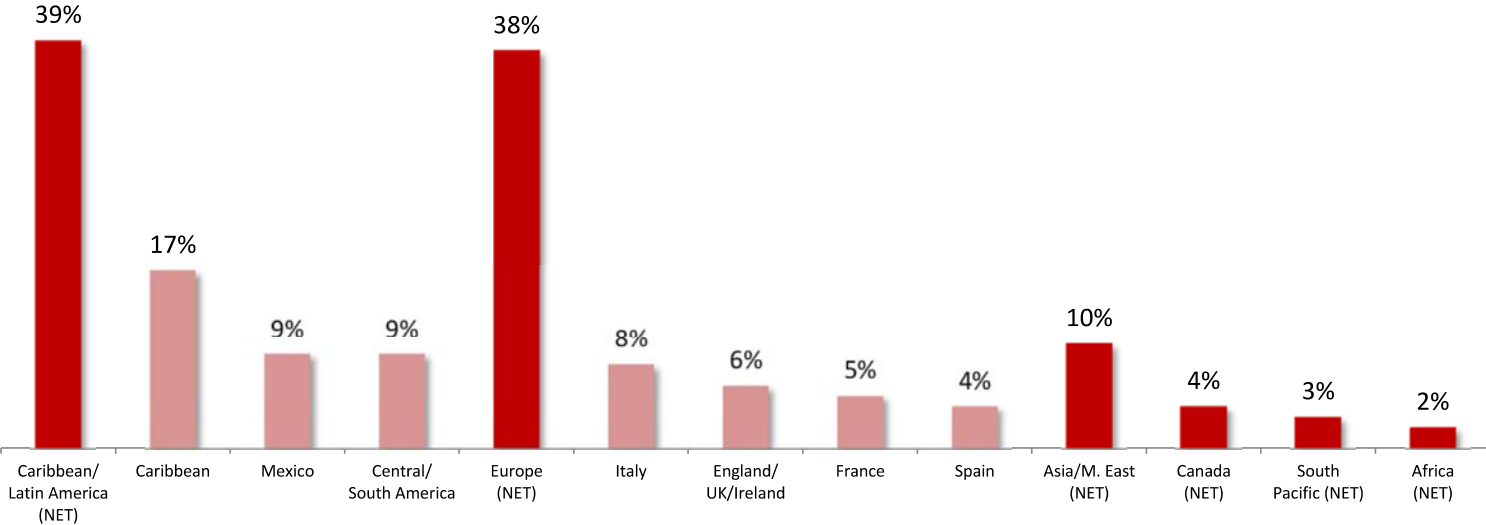
Q3a: Of the following international trip(s) you anticipate taking next year, please indicate which ones are already booked, currently being planned, or in the idea phase.

Q3b: For those international trip(s) that are still in the planning phase, have you selected a final destination yet? (n=163)

International Destinations

- International travel in 2018 is focused on the Caribbean/Latin America and Europe, as seen in past years.
- There are a few changes this year; traveling to Mexico, Canada, or England is down significantly compared to anticipated travel in 2017 (was 22%, 17%, 15%, respectively).

**Destinations Chosen
Among International Travelers**







Base: Baby Boomers With International Destination Chosen (n=306 coded responses); Data based on Total Responses, up to 5 trips discussed

Q3c: For the trip(s) listed below, please tell us where you have chosen to go. Please provide a Country, along with the final destination city/location. If you are planning to visit more than one destination per trip, please just tell us the destination where you plan to spend the most time.



Types of Domestic Trips

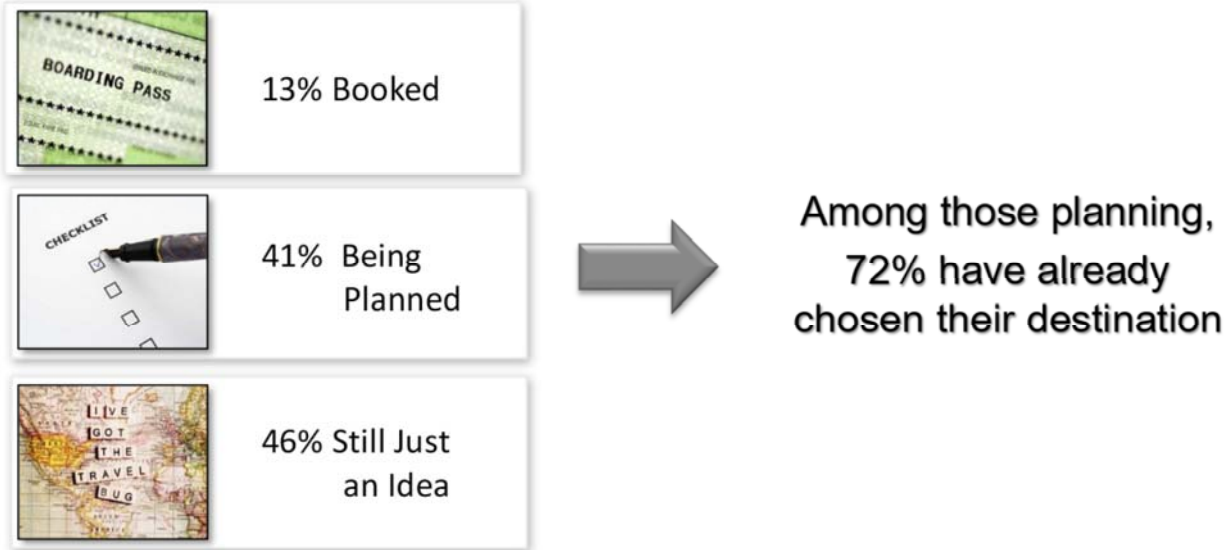
- For Domestic travel, a substantial portion of Boomers' trips come from summer vacation, multi-generational trips, and weekend getaways.
- The other types that account for another 40% of all trips are holiday, bucket list, solo, romantic, celebration, and family reunion.
- A few trip types are worth noting by generation;
 - A quick weekend getaway is a more popular trip type among GenXers (16%) than they are among Boomers (11%) or Millennials (12%).
 - Millennials are more likely to be planning a celebration vacation (9%) than are GenXers or Boomers (6% each).

Composition of Planned Trips			
	Summer Vacation	12%	} 35%
	Multi-Generational	12%	
	Weekend Getaway	11%	
	Holiday Travel	8%	} 40%
	Bucket List	7%	
	Solo Travel	7%	
	Romantic Getaway	6%	
	Celebration Vacation	6%	
	Family Reunion	6%	
	Obligation/Required	5%	} 17%
	Girls Getaway	3%	
	Wedding/Graduation	3%	
	Spring Break	2%	
	Adventure Travel	2%	
	To attend a sporting event	1%	
	Guys Getaway	1%	
	Heritage Trip	1%	
	Food Focused Trip	1%	
	Other	8%	

Base: Baby Boomer Domestic Trips in 2018 (n=2,054); Data based on Total Responses, up to 5 trips discussed Q4/Q4d: Of the domestic trips you plan on taking next year, please read the list of trip types below and select your primary motivation for EACH trip.

Commitment to Domestic Travel

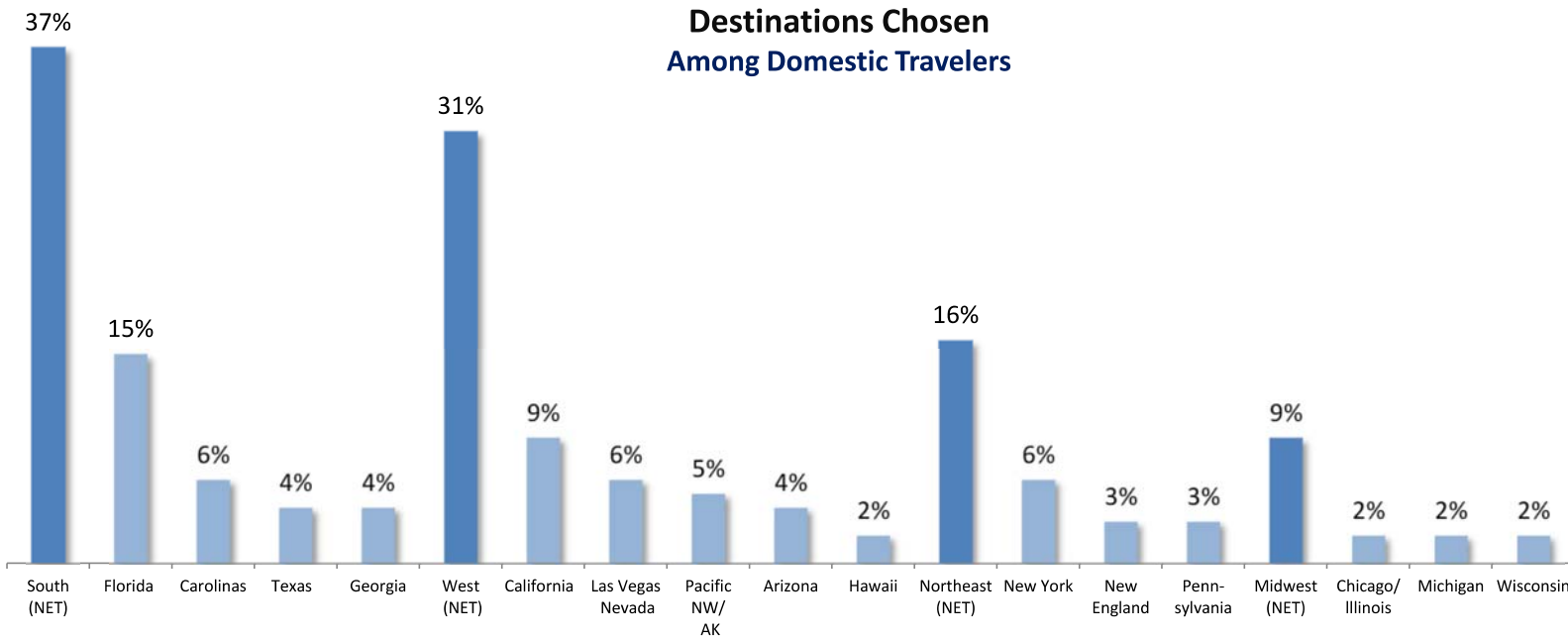
- Boomers' degree of commitment to their domestic travel plans is similar to 2017 trends, with approximately one out of ten trips currently booked, with the remainder split between planning and dreaming.
- Among the types of trips still in the idea phase, weekend getaways, summer vacations, and multi-generational trips top the list.



Base: Baby Boomer Domestic Trips in 2018 (n=686) Data based on Total Responses, up to 5 trips discussed
Q5a: Of the following domestic trip(s) you anticipate taking next year, please indicate which ones are already booked, currently being planned, or in the idea phase. (n=686)
Q5b: For those domestic trip(s) that are still in the planning phase, have you selected a final destination yet? (n=405)

Domestic Destinations

- While a variety of U.S. destinations are on the agenda for Boomer travel in 2018, they gravitate toward the South and Western states the most. Those places attracting the most attention are Florida, California, New York, Las Vegas, and the Carolinas.



Base: Baby Boomers With Domestic Location Chosen (n=888 coded responses); Data based on Total Responses, up to 5 trips discussed

Q5c: For the trip(s) listed below, please tell us where you have chosen to go. Please provide a State, along with the final destination city/location. If you are planning to visit more than one destination per trip, please just tell us the destination where you plan to spend the most time.

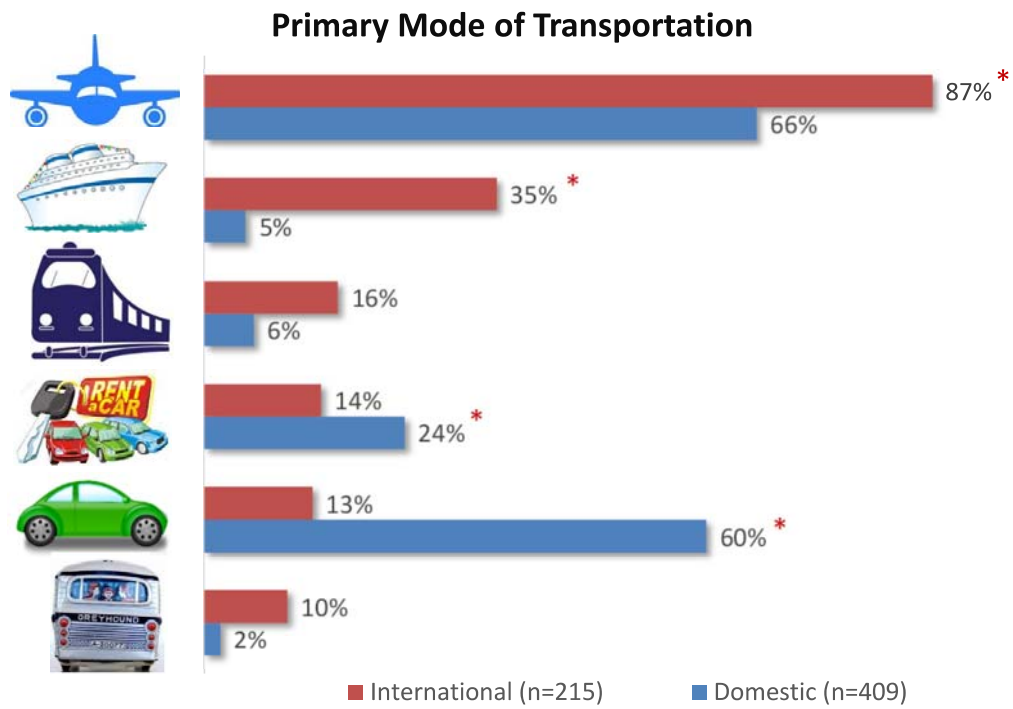


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No significant difference 2017 vs. 2018

Transportation

- Air travel is the most popular mode of transportation, regardless of destination or age. Cruise ships rank second for Boomer international travelers, while personal vehicles (road trips) tend to dominate domestic travel.

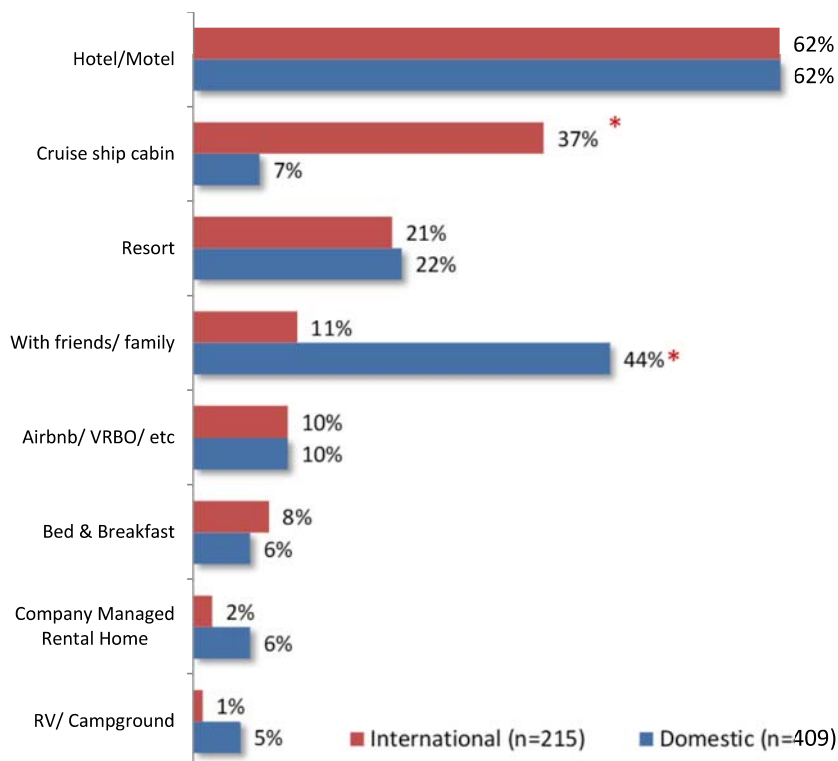


Base: Baby Boomers With Destination Chosen for Trip * Denotes a significant difference between travel segments
 Q3d/Q5d_2: What are all the different modes of transportation you will use to get to the [international/domestic] destinations you plan on visiting next year?

Accommodations

- Hotels and Motels continue to be the most common accommodation selections among Boomers.
- Approximately one-third of international travel will be on a cruise ship, making a cruise ship cabin the second most mentioned accommodations for international travelers.
- Among Boomers traveling domestically, staying with friends and family is more common than a resort, rental homes, or a Bed & Breakfast.
 - Millennials are far more open to alternate accommodations compared to Boomers with home rentals (company managed - 16%, Airbnb, etc.- 20%) and bed & breakfast (14%) options cited more than twice as often for domestic travel.

Travel Accommodations



Base: Baby Boomers With Destination Chosen for Trip
 Q3e/Q5e2: Which of the following best describes the type of accommodations you will be staying at on this trip?

* Denotes a significant difference between travel segments

Interest in Local Experiences

- Partaking in a more authentic, local experience (in terms of eating and touring) garners the interest of approximately half of the international Boomer travelers. That said, staying with locals remains a more acquired taste, attracting fewer than one in five.
 - GenXers and Millennials are more likely to stay with locals while traveling abroad (~30%) and to eat or tour with locals (60%, 66% and 61%, 56%, respectively).



Eat a Meal with Locals
 53% International
 44% Domestic



Tour with Locals
 49% International
 25% Domestic



Stay with Locals
 19% International
 21% Domestic

None
 30% International / 44% Domestic

Base: Baby Boomers Evaluating a Trip (n=367 International; n=686 Domestic)
 Q9d. While traveling in 2018, did you follow any of the following "authentic" experiences? Do you have interest in?

Detailed Findings: General Travel Behaviors

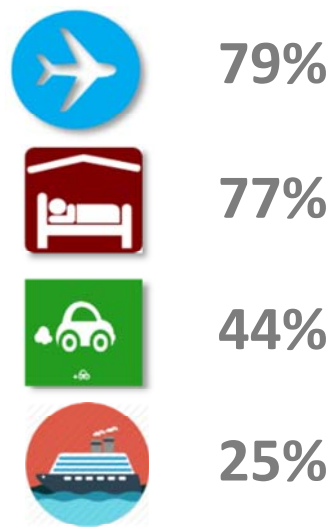


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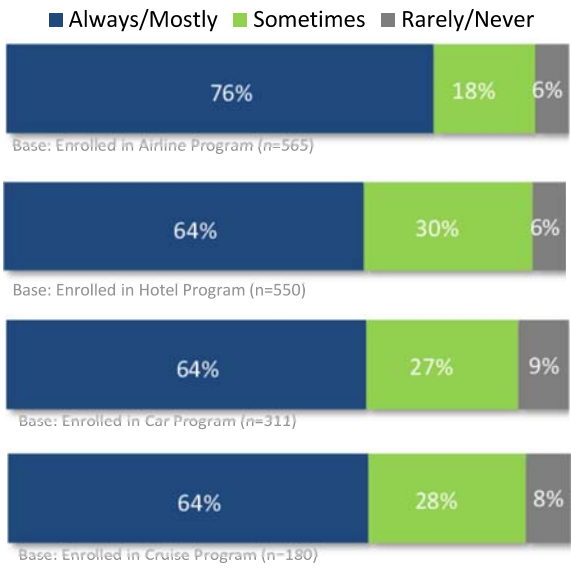
Travel Loyalty Programs

- Most Boomers participate in either an airline and/or hotel loyalty program and will book through these companies more often than not.
 - While fewer Millennials participate in loyalty programs compared to Boomers, those that do are significantly more likely to use them versus other options for their leisure travel needs (see appendix for proportions).

Program Membership



Frequency of Booking Through Program



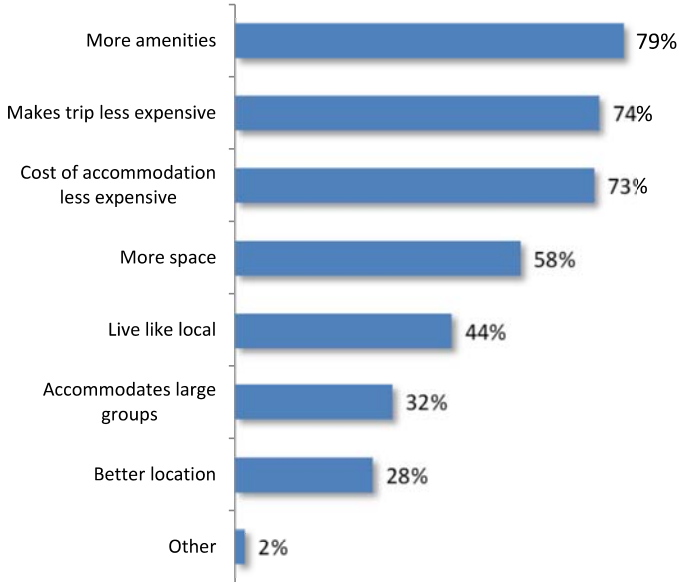
Base: 2018 Baby Boomer Travelers (n=714)
 Q5h: Please indicate the types of travel related loyalty programs you are currently a member of.

Q5i: How often do you book with your travel loyalty program provider versus other options in the marketplace when making leisure travel arrangements?

Pros & Cons of Alternative Accommodations

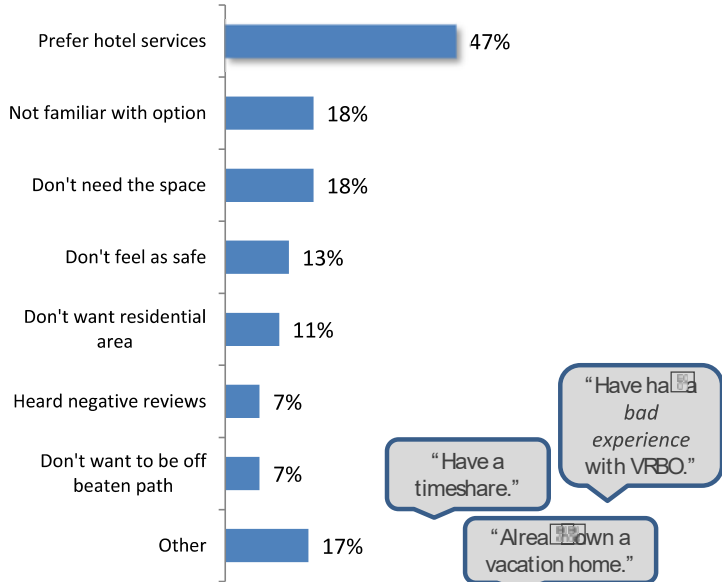
- Among those renting private homes (e.g. Airbnb, VRBO), the cost savings and additional amenities are most attractive.
- A preference for hotel services (e.g. room service, concierge) is the primary barrier to the renting of private homes for leisure travel among Boomers.

Why Will Rent Private Home



Base: Baby Boomers Planning to Rent Private Home (n=56)
 Q13b. Earlier you indicated you anticipate renting a home from a home owner through a service such as Airbnb, VRBO, etc. What do you believe are the benefits of using this type of an accommodation over other options such as motels, hotels, etc.?

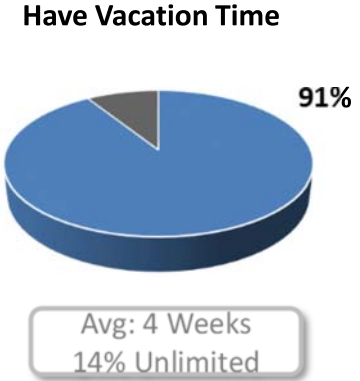
Why Will Not Rent Private Home



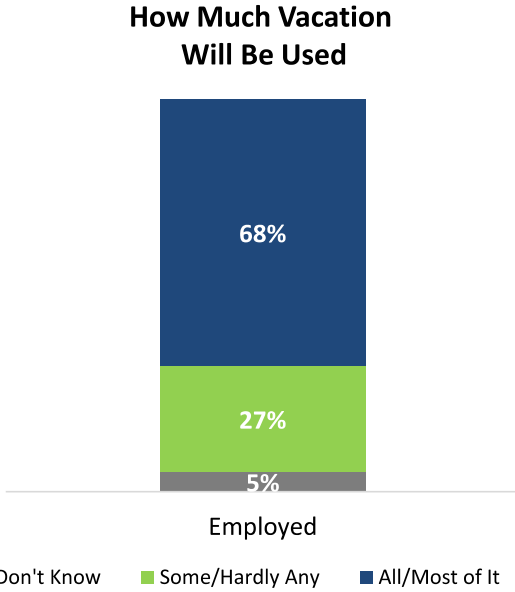
Base: Baby Boomers Planning to Not Rent Private Home (n=658)
 Q13c. Earlier you did not indicate interest in renting a home from a home owner through a service such as Airbnb, VRBO, etc. for any of your upcoming trip(s). Which of the following best describes why that is?

Work and Travel in 2018

- While approximately 90% of employed Boomers have vacation time, 2018 shows more of these workers anticipate using all or most of this time (68%) than what was reported in 2017 (59%).
 - In contrast, employed Millennials are more likely to use all/most of their vacation time compared to older generations (79% vs. 67% GenXers and 68% Boomers).



Base: Employed Baby Boomers (n=275)
Q16a: Approximately, how much vacation time/paid time off will you have in 2018?

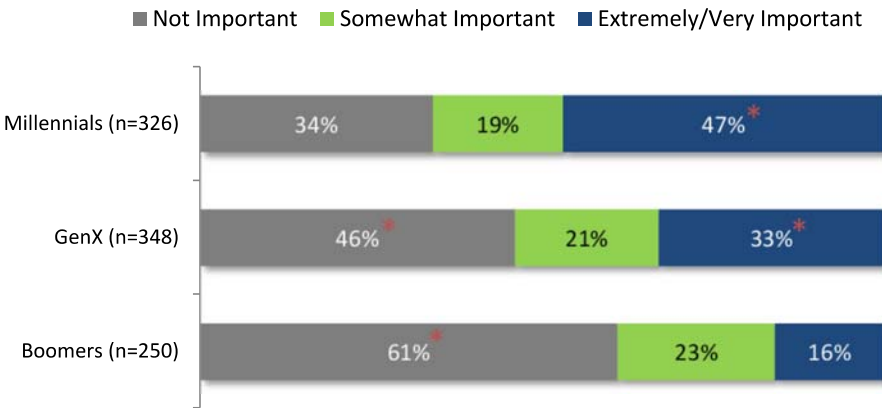


Base: Baby Boomers with Paid Time Off (n=250)
Q16b: How much of your paid vacation time will you use for personal travel in 2018?

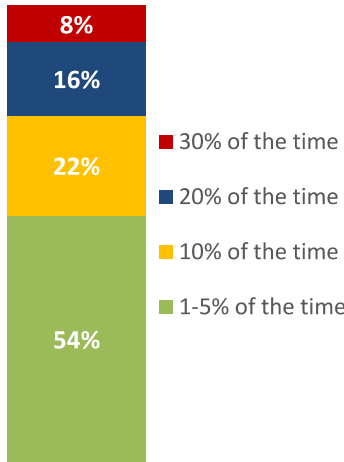
Work and Travel in 2018

- Similar to 2017 trends, the majority of working Boomers do not feel compelled to stay connected to work while on vacation.
- Among the 56% of employed Boomers who will work on vacation, most try to keep it to under 10% of their leisure time.
 - The importance of staying connected is higher for those who are younger, as is the commitment to working while on vacation; it is most prevalent among Millennials.

Importance of Staying Connected To Work



How Much Time Working



Base: Travelers with Paid Time Off
 Q17: In your opinion, how important is it for you to stay connected to work when you are on personal travel?
 * Denotes a significant difference between generations

Base: Baby Boomers Likely to Work on Vacation (n=140)
 Q17b: If you had to guess, what percent of your time do you spend on work-related stuff?

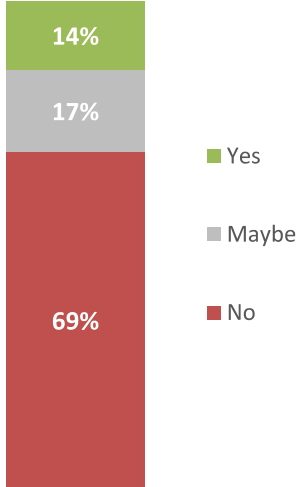
Extended Work Trips

- Boomers, unlike younger generations, do not tend to mix business with pleasure. The majority have not and will not extend a business trip to partake in leisure time in the same location.

Personal Travel Added on to Business Trip



2018 Plans to Mix Business & Personal Travel



Base: Employed Baby Boomers (n=275)
Q17c1. In the past two years, have you taken advantage of a business trip and either arrived early or stayed later to add on some vacation/leisure time to the trip?

Q17d. In 2018, do you anticipate taking advantage of any business trips and either arriving early or staying later to add on some vacation/leisure time to the trip?

Emotions Evoked with Social Media Use

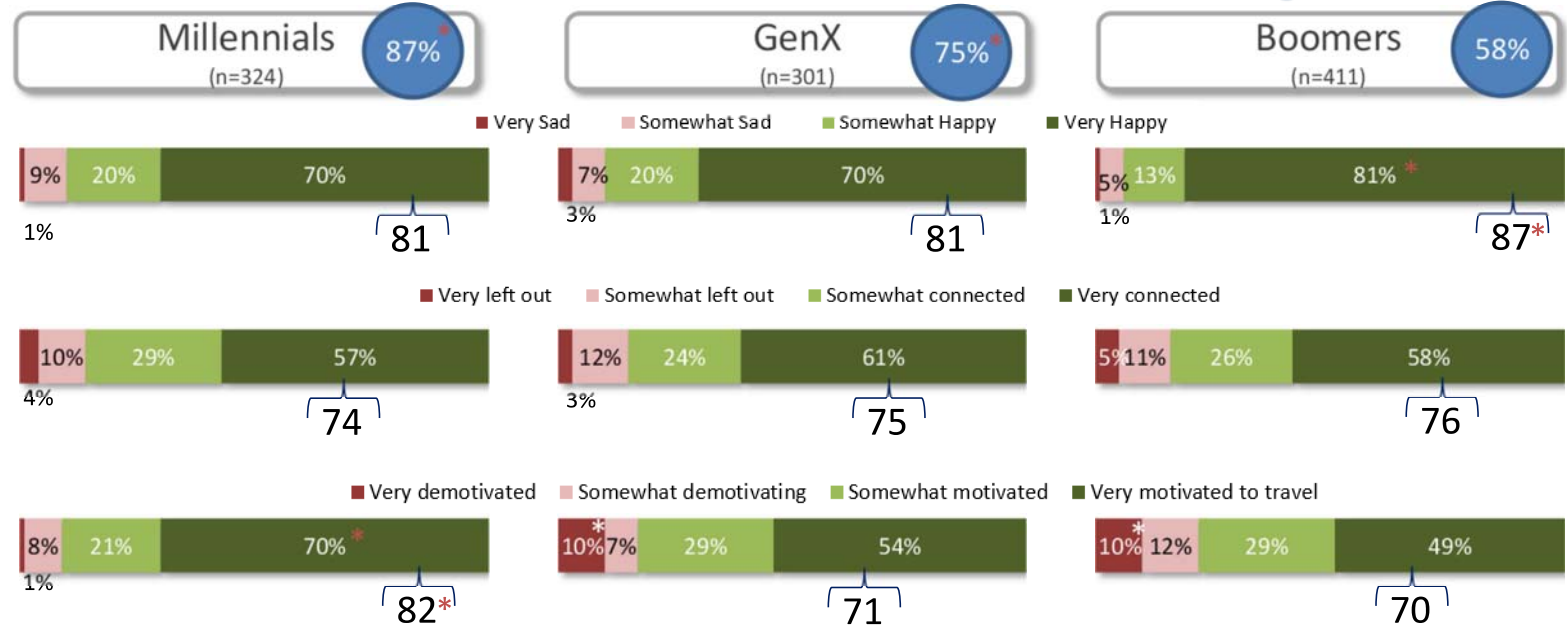
- For most, seeing other people's vacations in social media posts evoke positive responses and while Boomers like seeing the pictures they are less likely than Millennials to be inspired to travel because of them.



How Feel When Friends Post Trips



% Using social media on a regular basis



Base: Travelers who use social media regularly

Q15e. Do you use any social media sites on a regular basis?

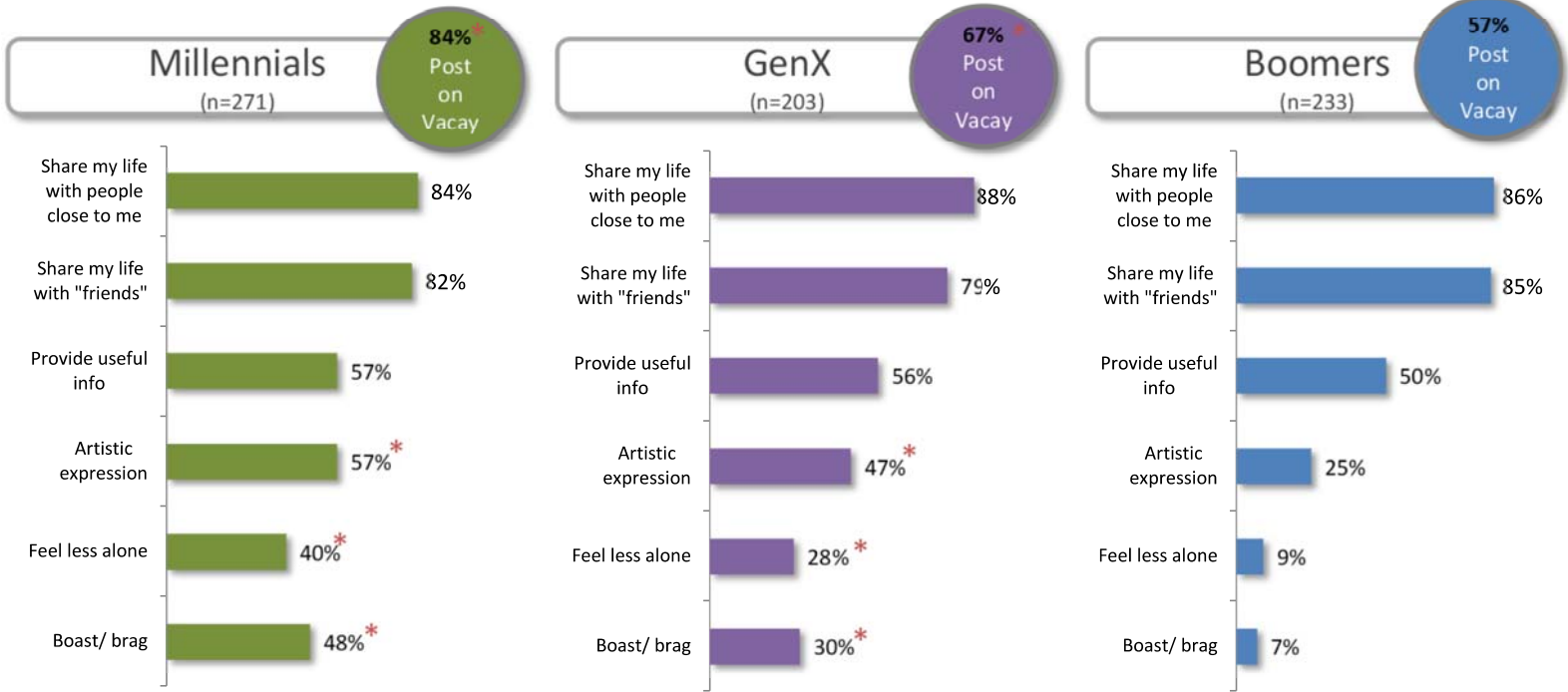
Q15f. Please use the slider bar below to indicate how you feel when you see a friend's posts about trips they have taken.

* Denotes a significant difference between generations

Denotes the average score

Reasons For Posting on Vacations

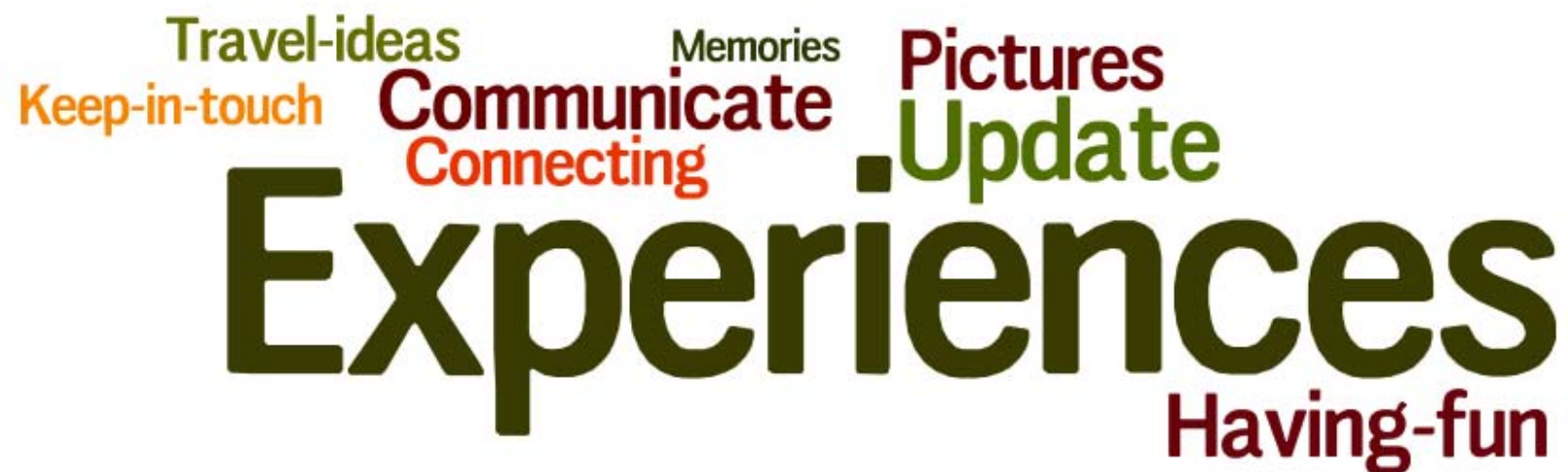
- For those Boomers who use social media, posting vacation pictures is all about sharing and while younger generations claim the same, they also admit the postings are sometimes about bragging, helping them feel less alone, or an artistic expression.



Base: Travelers who Post While Traveling
 Q15g. Do you typically post things about your trips/vacations?
 Q15h. Please indicate how much you agree or disagree with the following reasons why you post your trips/vacations on social media.

* Denotes a significant difference between generations

Other Reasons for Posting



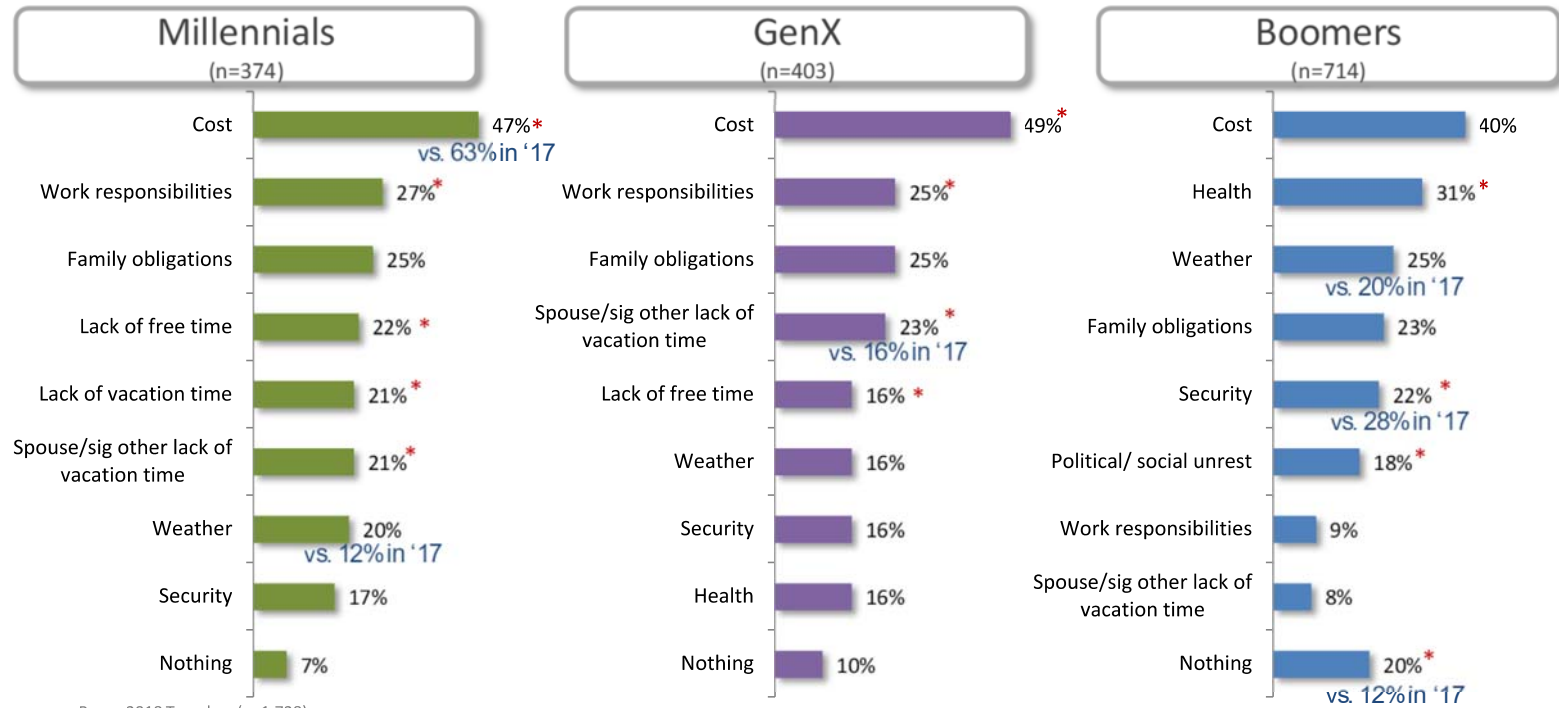
Base: Baby Boomers Who Post While Traveling (n=233)

Q15i. Please use the space below to share with us any other reasons or motivations you have for sharing your trips/vacations through social media.

Barriers to Travel in 2018

- Different barriers surface by generations/life stage, but for all, cost continues to be at the top of the list. Differences compared to last year are noted below.

What Will Prevent 2018 Travel



Base: 2018 Travelers (n=1,728)
 Q22. What planning has prevented you or might prevent you from taking all of the personal trips you'd like to take in 2018?

* Denotes a significant difference between generations

Appendix A: Methods

Methodology

- A 15-minute online survey was conducted among males and females, 20+, who have taken at least one trip 50 miles or more away from home, with a two-night stay, in the past two years.
- Respondents were further identified as previously using an online travel site within the past 2 years and having an intent to travel for personal pleasure (non-business travel) in 2018.
- The survey was in field from September 12-20, 2017
- A total of n=1,728 surveys were completed; final unweighted counts are detailed in the table to the right
- Final data has been weighted to U.S. Census for analysis, by generation

Completes	
	Total
Total	1728
Gender	
Male	878
Female	850
Age	
20-36	374
37-52	403
53-59	252
60-69	356
70+	343
Ethnicity	
Caucasian	1029
African American/Black	259
Hispanic	251
Asian	126
Other	63
Region	
Northeast	315
Midwest	371
South	607
West	435

Counts by Age Segment

- The focus of this analysis is among Baby Boomers (adults age 53-71) who intend to travel in 2018.
- Millennials (age 20-36) and Gen X respondents (age 37-52) have also been evaluated to compare and contrast travel behaviors for 2018.
- Counts by generation are as follows, weighted.

	Millennials	GenX	Baby Boomers
Total	374	403	714
Age			
20-36	374		
37-52		403	
53-71			714
Gender			
Female	183	206	378
Male	191	197	336
Race			
Caucasian/Other	225	259	516
African American	49	49	75
Hispanic	75	64	67
Asian American/Other	25	30	57
Region			
West	90	93	164
South	138	149	264
Midwest	79	89	157
Northeast	67	73	129

Appendix B: Generational Comparisons

Travel Snapshot By Generation

- Overall, a substantial portion of travelers anticipate both domestic and international travel in 2018. That said, compared to younger generations, Boomers are more likely to partake in just domestic travel versus experiencing both.
 - There are significantly more Millennial and GenX travelers anticipating both domestic and international trips in 2018 than was reported in 2017.
- Among Boomers who anticipate international travel, they are more likely to be checking a destination off their bucket list than those younger, where as Millennials and GenXers are more likely to take a summer vacation abroad than those older.
- Types of domestic trips anticipated do not vary much by generation. GenX travelers are most likely to take a weekend getaway and Millennials to take a domestic celebration vacation.

	Millennials (a)	Generation X (b)	Baby Boomers (c)
Destination	Base (people): (374)	(403)	(714)
International	5%	4%	4%
Domestic	31%	37%	49% <i>ab</i>
Both	64% <i>c</i>	59% <i>c</i>	47%
Number of Trips (Average)			
International	2.6 <i>bc</i>	2.1 <i>c</i>	1.5
Domestic	4.1	3.8	4.0
Total	5.8 <i>c</i>	5.1	4.6
Top 5 Trip Types: International	Base (trips): (544)	(460)	(548)
Bucket List trip	6%	13% <i>a</i>	22% <i>ab</i>
Summer vacation	13% <i>c</i>	14% <i>c</i>	9%
Multi-generational trip	12%	10%	9%
Celebration vacation	9%	10%	9%
Romantic getaway	11%	9%	10%
Top 5 Trip Types: Domestic	Base (trips): (355)	(386)	(686)
Summer vacation	13%	13%	12%
Multi-generational trip	11%	12%	12%
Weekend getaway	12%	16% <i>ac</i>	11%
Holiday travel	9%	10%	8%
Celebration vacation	9% <i>bc</i>	6%	6%

Letters denote a significant difference between generations

Travel Motivators

2018 Travel Motivation

	Millennials (a)	GenX (b)	Boomers (c)
Base	374	403	714
Spend time with family/ friends	49%	51%	57% a
Relax & rejuvenate	45%	50%	49%
Get away from normal, everyday life	45%	44%	47%
Visit a place I've always wanted to go	31%	35%	37%
Share new experiences with sig. other	26%	30%	32% a
Go on adventure	27% c	24%	21%
Try something new	24% c	19%	15%
Improve health	12% bc	5% c	2%
Scout retirement locations	7% b	4%	4%
Scout relocation	4% c	6% c	1%
Other	1%	1%	5% ab

Base: 2018 Travelers (n=1,728)

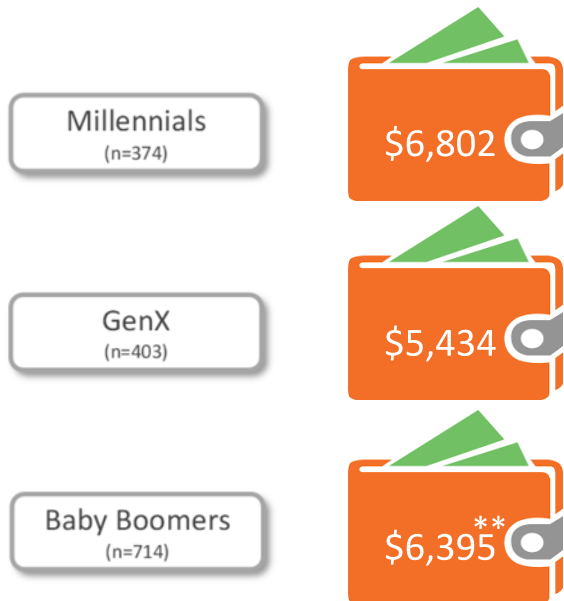
Q9b: Please select your top three motivators for choosing the destination for this trip.

Letters denote a significant difference between generations

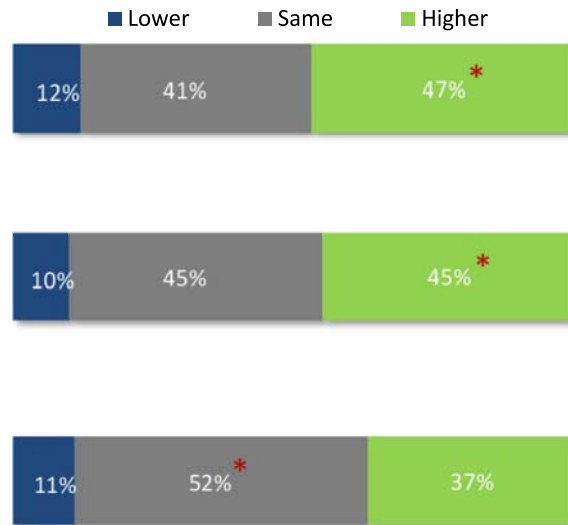


2018 Travel Spend Anticipated

Anticipated Total Spend 2018 Travel



Spend Compared to 2017



Base: 2018 Travelers (n=1,728)

Q13d. Now that you have thought through your anticipated travel plans for 2018, approximately how much do you expect to spend on travel in 2018, in total?



















*Denotes a significant difference

Q13e. And how does ... compare to your travel expenditures in 2017?

**Denotes a significant difference between Boomers and GenX

Types of International Trips









Composition of Planned Trips

	Millennials ^a (n=544)	GenX ^b (n=460)	Boomers ^c (n=548)
 Bucket List	6%	13%	22% ^{ab}
 Summer Vacation	13% ^c	14% ^c	9%
 Multi-Generational	12%	10%	9%
 Romantic Getaway	11%	9%	10%
 Celebration Vacation	9%	10%	9%
 Solo Travel	9%	7%	9%
 Family Reunion	8% ^{bc}	5%	4%
 Weekend Getaway	6%	5%	3%
 Adventure Travel	0%	2%	3%
 Girls Getaway	2%	1%	3%
 Holiday Travel	6%	9% ^c	2%
 Obligation/Required	4%	2%	2%
 Wedding/Graduation	6% ^c	3%	1%
 Spring Break	5% ^c	3%	1%
 Guys Getaway	3% ^c	4% ^c	1%
 Heritage Trip	0%	0%	1%
 Food Focused Trip	0%	0%	1%
 Other	0%	3%	12% ^{ab}

Base: International Trips in 2018; Data based on Total Responses, up to 5 trips discussed

Types of Domestic Trips





Composition of Planned Trips

	<u>Millennials^a</u> (n=1,064)	<u>GenX^b</u> (n=1,103)	<u>Boomers^c</u> (n=2,054)
 Summer Vacation	13%	13%	12%
 Multi-Generational	11%	12%	12%
 Weekend Getaway	12%	16% ^{ac}	11%
 Holiday Travel	9%	10%	8%
 Bucket List	5%	5%	7% ^{ab}
 Solo Travel	7%	5%	7% ^b
 Romantic Getaway	8% ^c	8% ^c	6%
 Celebration Vacation	9% ^{bc}	6%	6%
Family Reunion	6%	6%	6%
Obligation/Required	3%	4%	5%
Girls Getaway	2%	3%	3%
Wedding/Graduation	4%	2%	3%
Spring Break	5% ^c	6% ^c	2%
Adventure Travel	0%	0%	2%
To attend a sporting event	0%	1%	1%
Guys Getaway	3% ^c	2%	1%
Heritage Trip	0%	0%	1%
Food Focused Trip	0%	0%	1%
Other	2%	2%	8%

Base: Domestic Trips in 2018; Data based on Total Responses, up to 5 trips discussed

Travel Loyalty Programs

Program Membership

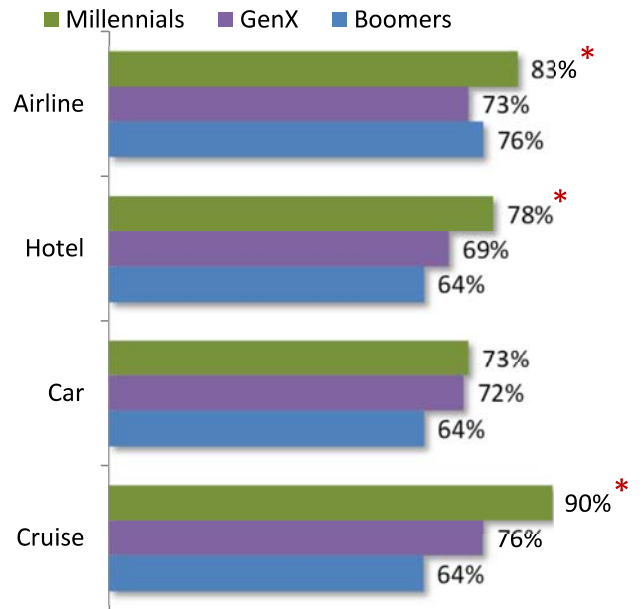
	Millennials (n=374) (a)	GenX (n=403) (b)	Boomers (n=714) (c)
	65%	70%	79% <i>ab</i>
	63%	70% <i>a</i>	77% <i>ab</i>
	36%	36%	44% <i>ab</i>
	19%	20%	25% <i>ab</i>

Base: 2018 Travelers (n=1,728)

Q5h: Please indicate the types of travel related loyalty programs you are currently a member of.

Letters denote a significant difference between generations

Always/Mostly Booking Through Program



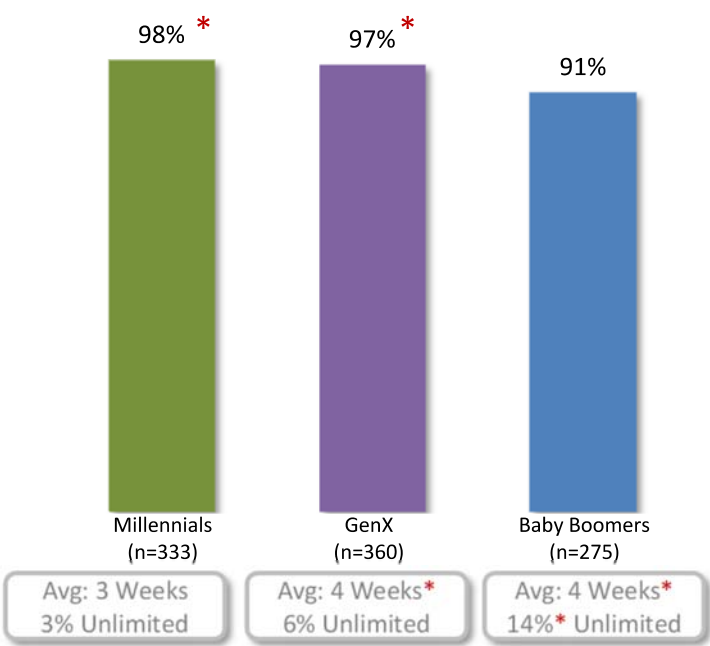
Base: Members of loyalty programs (n size varies by program)

Q5i: How often do you book with your travel loyalty program provider versus other options in the marketplace when making leisure travel arrangements?

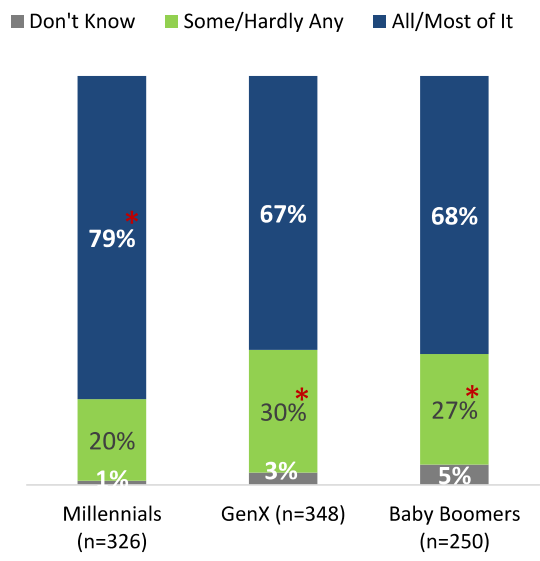
** Denotes a significant difference between generations*

Work and Travel in 2018

Have Vacation Time



How Much Vacation Will Be Used



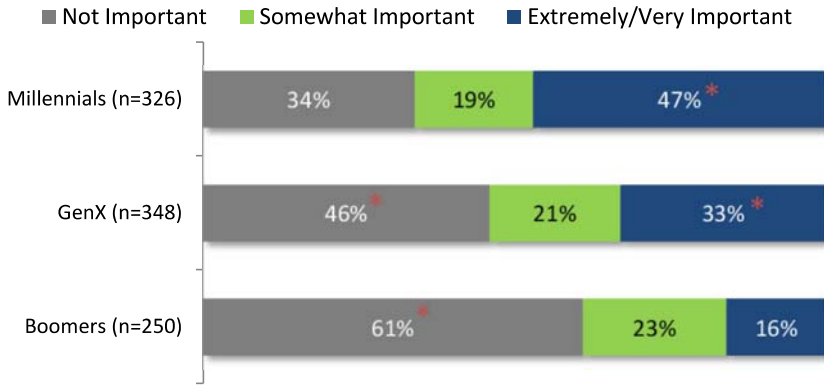
Base: Employed Travelers
Q16a: Approximately, how much vacation time/paid time off will you have in 2018?

Base: Have Paid Time Off
Q16b: How much of your paid vacation time will you use for personal travel in 2018?

* Denotes a significant difference between generations

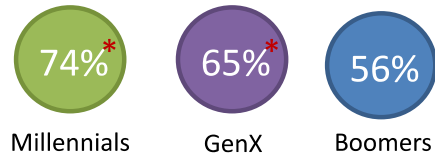
Work and Travel in 2018

Importance of Staying Connected To Work



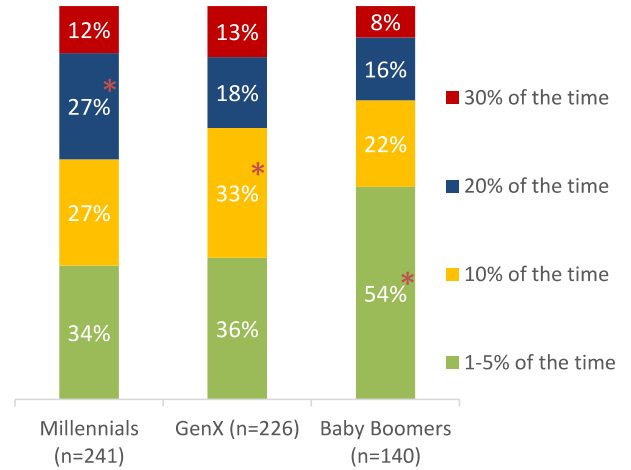
Base: Have Paid Time Off
Q17: In your opinion, how important is it for you to stay connected to work when you are on personal travel?

Likely To Work On Vacation



Base: Have Paid Time Off
Q17b: If you had to guess, what percent of your time do you spend on work-related stuff?

How Much Time Working

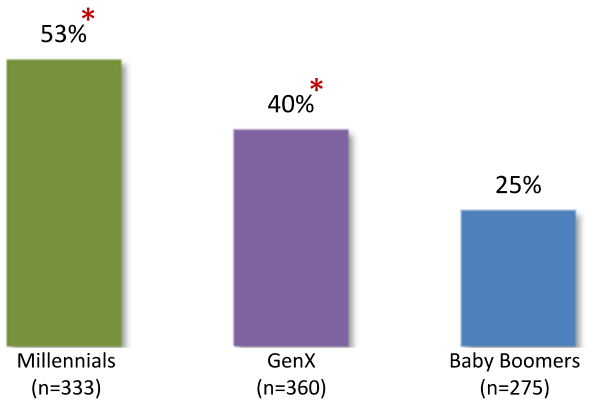


Note: Those who say 0% of the time have been removed from this metric

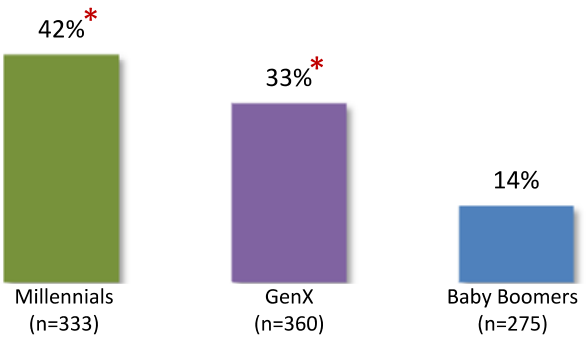
Base: Travelers Likely to Work
Q17b: If you had to guess, what percent of your time do you spend on work-related stuff?

Extended Work Trips

**Have Added Personal Travel to a Business Trip
(% Yes)**



**Plan to Add Personal Travel to a Business
Trip in 2018
(% Yes)**



Base: Employed Travelers
Q17c1. In the past two years, have you taken advantage of a business trip and either arrived early or stayed later to add on some vacation/leisure time to the trip?

Q17d. In 2018, do you anticipate taking advantage of any business trips and either arriving early or staying later to add on some vacation/leisure time to the trip?

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