

RESEARCH



DISCOVERING THE MILLENNIAL TRAVELER

Travel trends and
insights on the emerging
millennial traveler



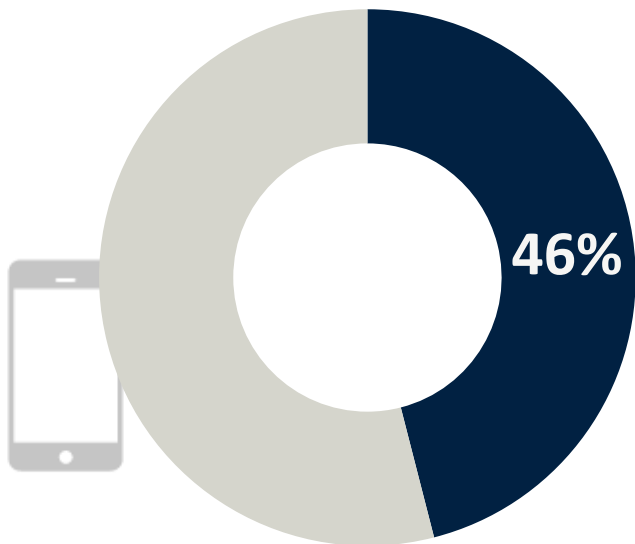
American Millennial Traveler



CLOSE TO HALF OF MILLENNIAL SMARTPHONE OWNERS AND TABLET OWNERS ENGAGED

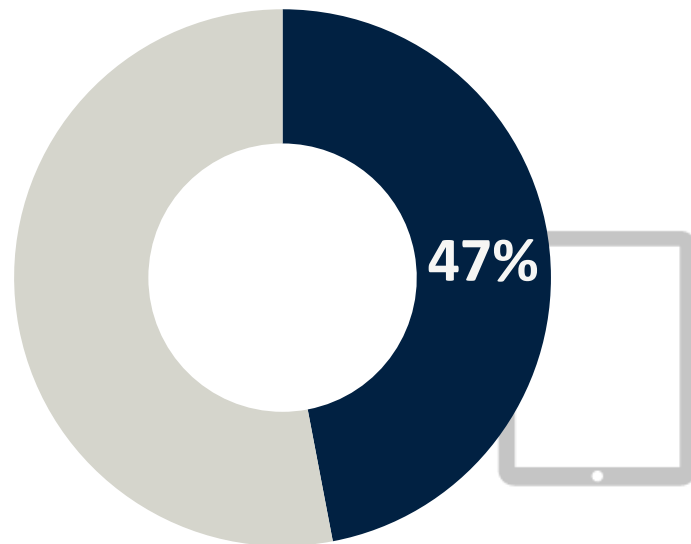
WITH THEIR DEVICES FOR TRAVEL PLANNING.

U.S. MILLENNIAL SMARTPHONE OWNERS WHO
RESEARCHED USING THEIR DEVICE



*Among Millennial U.S. Online Travel Buyers with
Smartphones (n=116)*

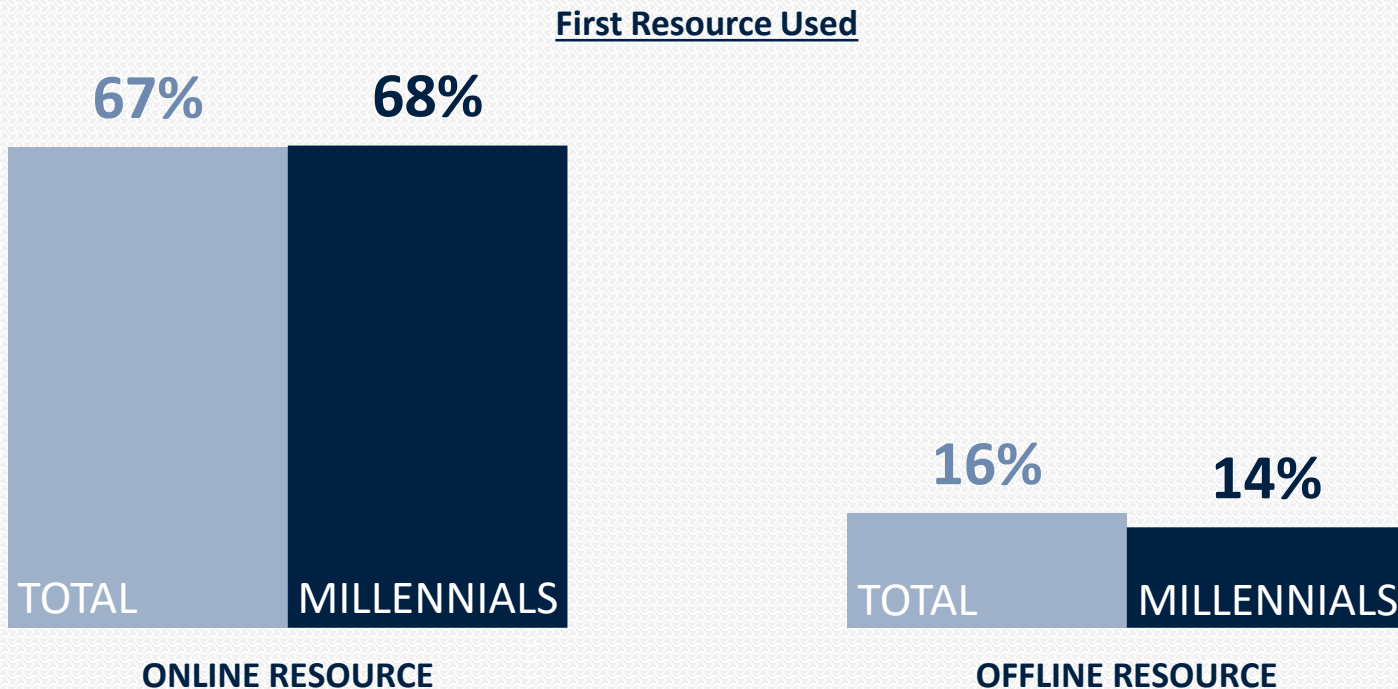
U.S. MILLENNIAL TABLET OWNERS WHO RESEARCHED
USING THEIR DEVICE



*Among Millennial U.S. Online Travel Buyers with
Tablets (n=81*)*



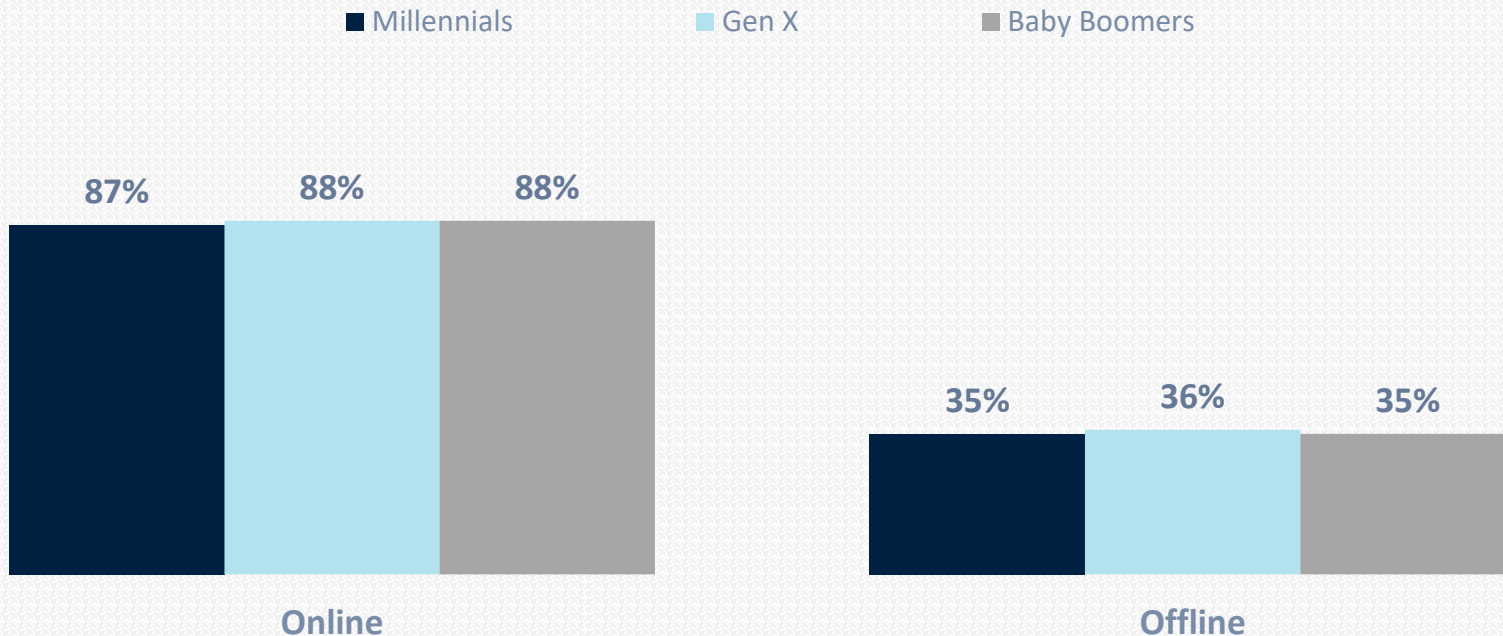
MAJORITY OF TRAVEL BOOKERS BEGAN THEIR BOOKING PROCESS ONLINE





REGARDLESS OF AGE, ONLINE RESEARCH WAS MORE COMMON THAN OFFLINE TRAVEL RESEARCH

Resources Used – By Age



Data Source: comScore Survey, RESOURCE. WHAT ARE ALL THE RESOURCES YOU USED PRIOR TO BOOKING YOUR MOST RECENT TRIP?, Among Total U.S. Online Travel Bookers – By Age

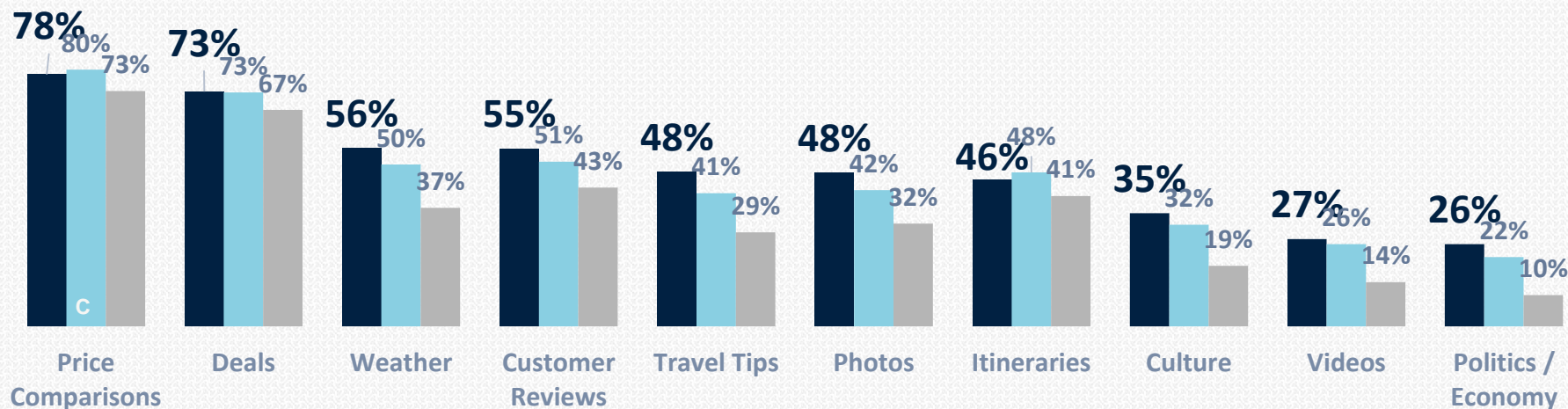
A/B/C letters indicate a significant difference between groups at a 95% confidence level.



WHILE PRICE COMPARISONS AND DEALS ARE SOUGHT BY ALL AGE GROUPS, MILLENNIALS WERE MORE LIKELY TO SEEK OUT NON-PRICE RELATED TRIP INFORMATION

Content Sought – By Age

■ Millennials ■ Gen X ■ Baby Boomers



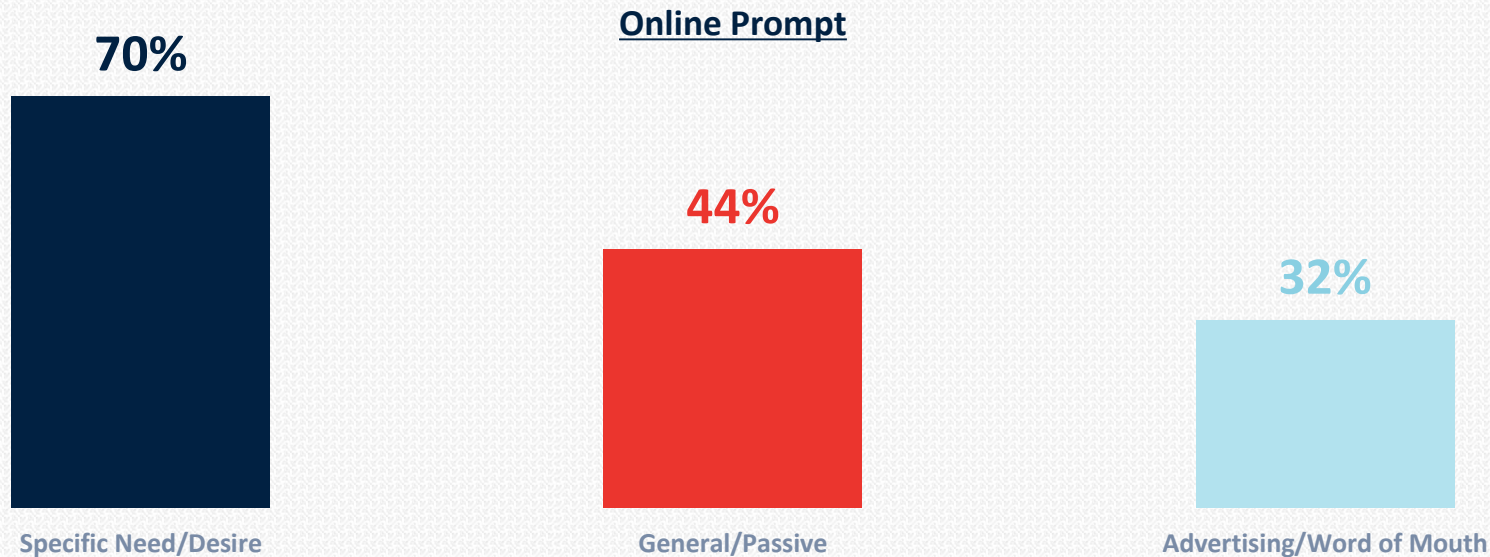
Data source: comScore Survey, CONTENT. % SOUGHT INFO (Percent of Respondents Who Did Not Select "I did not seek out this information prior to or during booking."), WHEN DID YOU SEEK OUT THE FOLLOWING TYPES OF INFORMATION FOR THE TRIP YOU RECENTLY BOOKED?

Among Total U.S. Online Travel Bookers – By Age

A/B/C letters indicate a significant difference between groups at a 95% confidence level.



U.S. ONLINE TRAVEL BOOKERS ARE GENERALLY MOTIVATED BY A SPECIFIC NEED OR DESIRE TO START THEIR ONLINE TRAVEL RESEARCH PROCESS



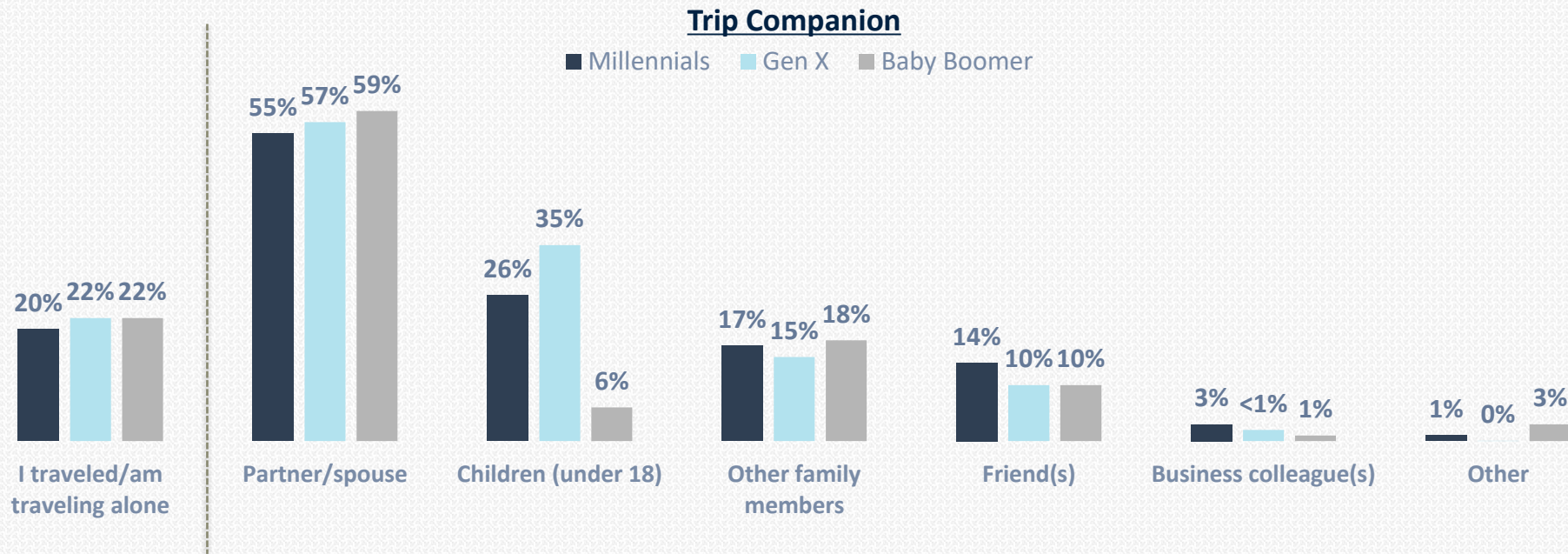
Data source: comScore Survey, PROMPTFOLLOW. WHAT PROMPTED YOU TO USE ONLINE RESOURCES WHEN YOU FIRST STARTED LOOKING FOR A DESTINATION TO VISIT?, Among U.S. Online Travel Bookers Who Used Online Resources When First Looking for Destination (n=420)

Specific Need/Desire includes: Needed a vacation, Needed to get away, Wanted to compare destinations, and Necessity to find destination. General/Passive includes: General interest, Saw a destination you liked, and Boredom. Advertising/Word of Mouth includes: Family/friend recommendations, TV ads, Internet ads, and Social media posts. Other not shown.



ASIDE FROM TRAVELING WITH CHILDREN

THERE ARE NO MAJOR DIFFERENCES BETWEEN AGE GROUPS AS IT RELATES TO TRAVEL COMPANION CHOICES



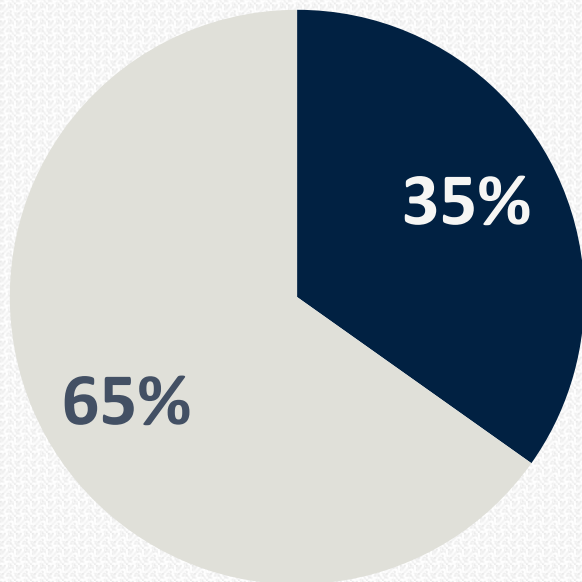
Data Source: comScore Survey, COMPANION. WHO TRAVELED/WILL BE TRAVELING WITH YOU?, Among Total U.S. Online Travel Bookers – By Age.
A/B/C letters indicate a significant difference between groups at a 95% confidence level.



JUST OVER ONE-THIRD OF ONLINE TRAVEL BOOKERS STARTED WITH MULTIPLE DESTINATIONS IN MIND.

EVEN MORE MILLENNIALS CONSIDER MULTIPLE DESTINATIONS

Number of Destinations Considered



- 2+ destinations considered
- 1 destination considered

42%

OF MILLENNIALS TRAVEL
BOOKERS CONSIDERED 2+
DESTINATIONS.

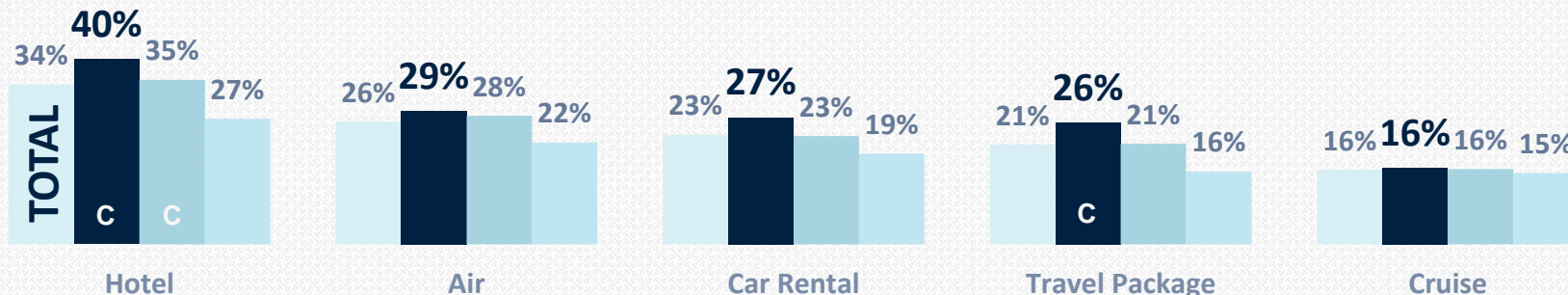
Data Source: comScore Survey, DESTINATIONS. PRIOR TO DECIDING ON YOUR FINAL DESTINATION, HOW MANY OTHER DESTINATIONS DID YOU CONSIDER VISITING?, Among Total U.S. Online Travel Bookers (n=805), Millennials (n=134)



MILLENNIALS HAD A HIGHER TENDENCY TO NOTICE TRAVEL ADS FOR HOTELS AND TRAVEL PACKAGES COMPARED TO BABY BOOMERS

Advertising Awareness Among Total U.S. Online Travel Bookers

■ Total ■ Millennials ■ Gen X ■ Baby Boomers



Data Source: comScore Survey, ADAWARE. DID YOU NOTICE ANY ADVERTISING RELATED TO THE FOLLOWING SERVICES WHILE YOU WERE SHOPPING FOR OR BOOKING YOUR TRAVEL?, Among Total U.S. Online Travel Bookers (n=805) and By Age

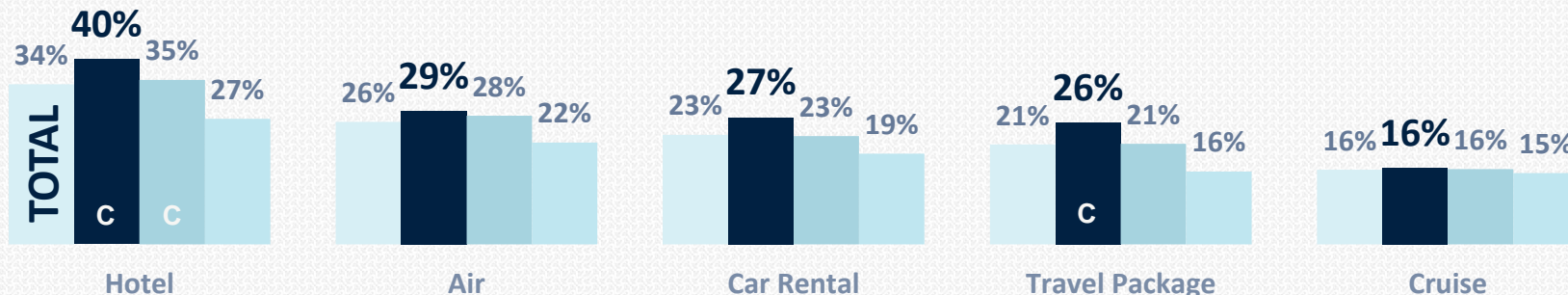
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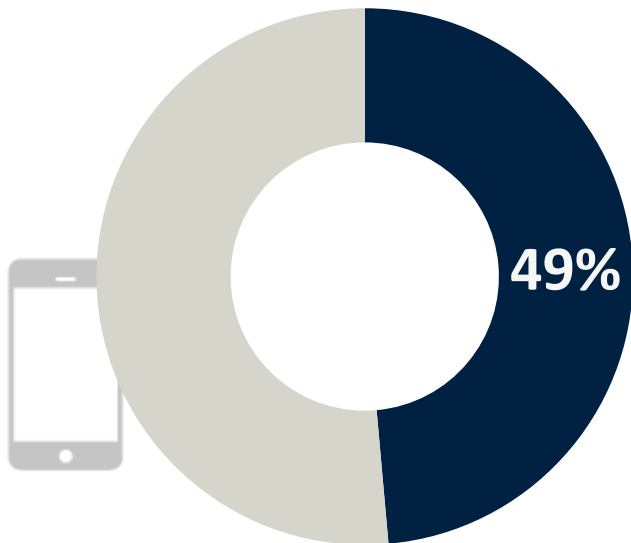


British Millennial Traveler



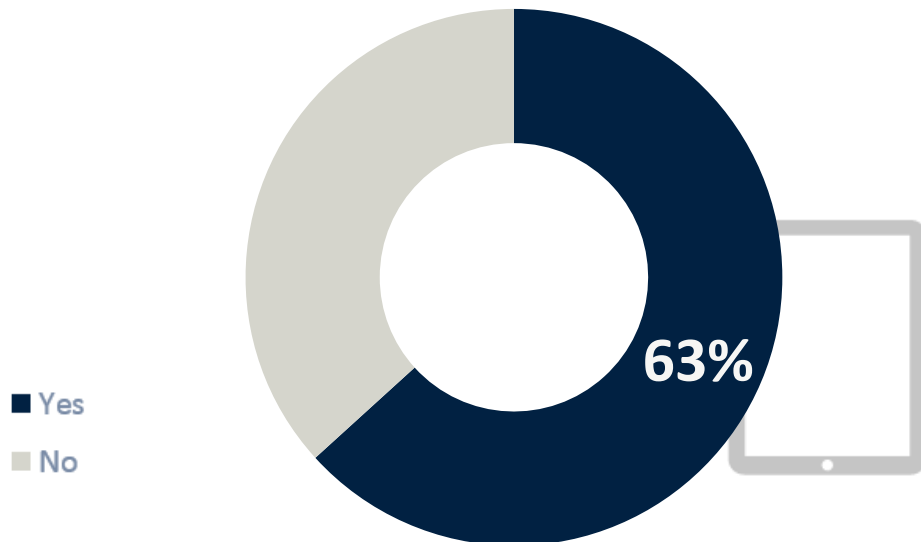
HALF OF SMARTPHONE OWNERS AND OVER THREE IN FIVE TABLET OWNERS USED THEIR MOBILE DEVICES TO PLAN TRIPS

SMARTPHONE OWNERS WHO RESEARCHED USING
THEIR DEVICE



Among UK Online Travel Buyers with Smartphones (n=713)

TABLET OWNERS WHO RESEARCHED USING THEIR
DEVICE



Among UK Online Travel Buyers with Tablets (n=579)

THE VAST MAJORITY OF ONLINE BOOKERS TRAVELED WITH COMPANIONS



88%

TRAVELLED WITH A COMPANION



1 IN 4

MILLENNIALS

TRAVELLED WITH
FRIENDS

63%

TRAVELLED WITH THEIR SPOUSE OR
SIGNIFICANT OTHER

TRAVEL IS STILL A CONSIDERED & TIME CONSUMING PURCHASE FOR ONLINE TRAVEL BOOKERS



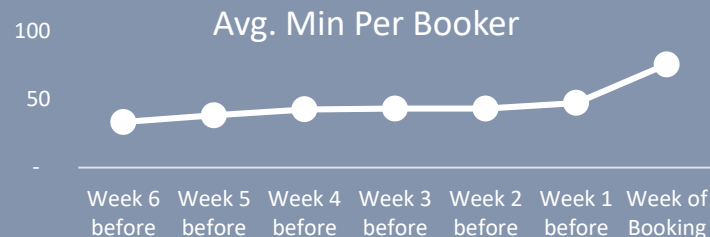
>3

RESOURCE TYPES USED
THROUGHOUT THE DECISION PROCESS
(ONLINE & OFFLINE)

2X

MORE LIKELY TO HAVE
BOOKED AN INTERNATIONAL
TRIP THAN A DOMESTIC TRIP
IN THE LAST SIX MONTHS

Travel Engagement



18.2

VISITS

NUMBER OF TRAVEL VISITS ON AVERAGE PER WEEK
ONLINE BOOKERS SPEND THROUGHOUT THE 45 DAYS
PRIOR TO BOOKING

>1HR

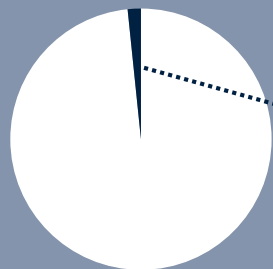
AVERAGE TIME ONLINE BOOKERS SPENT ON TRAVEL
SITES ON DESKTOP THE WEEK OF BOOKING

MILLENNIALS USE

16%

MORE RESOURCE TYPES
ON AVERAGE

THE TRAVEL MARKETPLACE IS RICH WITH OPPORTUNITIES FOR ADVERTISERS



2% AD SHARE

TRAVEL AD SHARE
COMPARED TO ALL AD
CATEGORIES (ALL
USERS)

■ Non Travel ■ Travel

1 IN 10 ADS

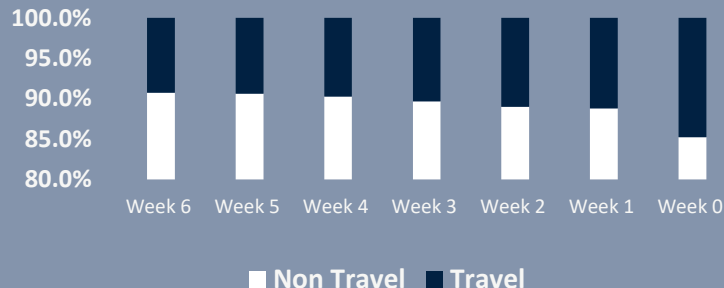
SHOWN TO ONLINE TRAVEL BOOKERS DURING
THEIR 45 DAY PATH WERE TRAVEL SPECIFIC

TRAVEL IS THE
2nd

LARGEST AD
CATEGORY

APPAREL &
ACCESSORIES ADS
WERE THE MOST
COMMONLY SERVED
TO ONLINE BOOKERS

AD EXPOSURE



25%+

MORE LIKELY TO NOTICE ADS
MILLENNIALS TENDENCY TO NOTICE TRAVEL
ADS COMPARED TO BABY BOOMERS OR GEN-X



Canadian Millennial Traveler

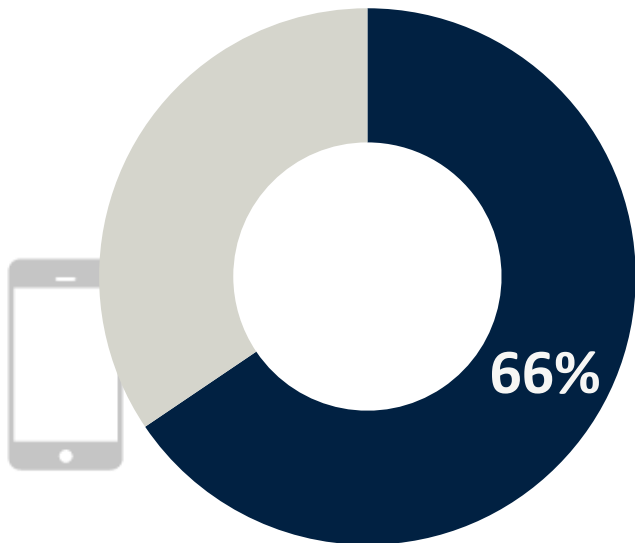


OVER SIX IN TEN MILLENNIAL SMARTPHONE OWNERS AND TABLET OWNERS ENGAGE

WITH THEIR DEVICES FOR TRAVEL PLANNING

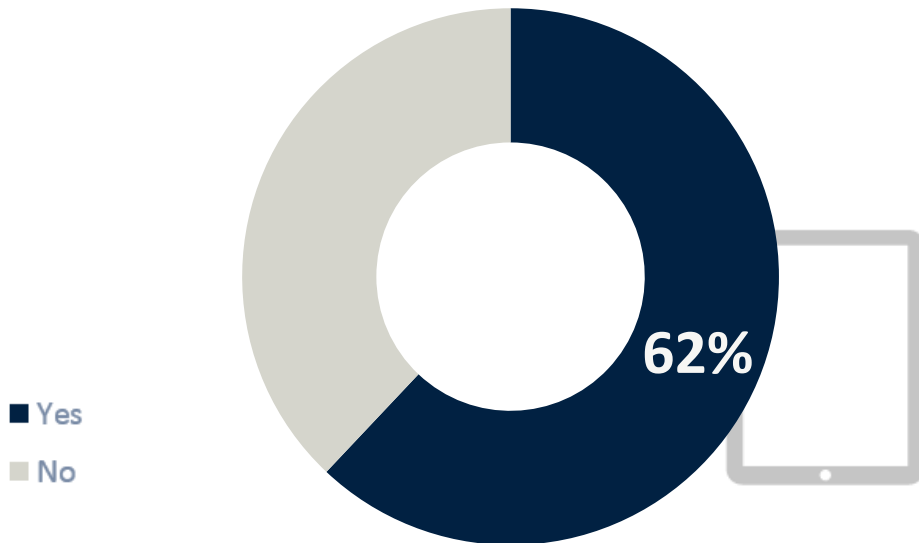
Millennials Who Researched Using a Smartphone

(Base: Millennial Smartphone Owners)



Millennials Who Researched Using a Tablet

(Base: Millennial Tablet Owners)

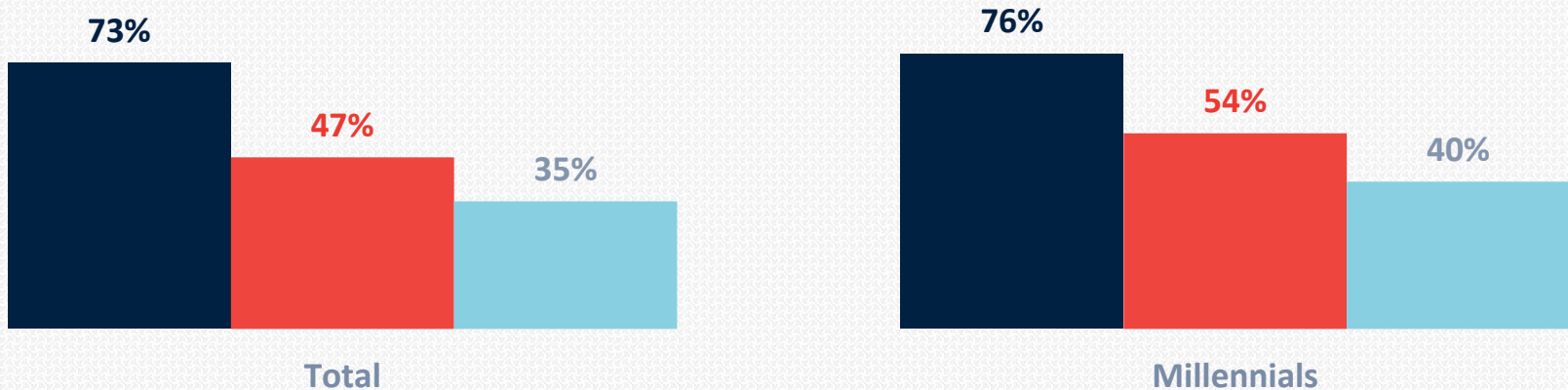




MAJORITY OF ONLINE TRAVEL BOOKERS ARE PROMPTED TO SEARCH ONLINE BY A SPECIFIC NEED OR DESIRE

Online Prompt

■ Specific Need/Desire ■ General/Passive ■ Advertising/Word of Mouth



Data Source: comScore Survey, PROMPTFOLLOW. WHAT PROMPTED YOU TO USE ONLINE RESOURCES WHEN YOU FIRST STARTED LOOKING FOR A DESTINATION TO VISIT?, Among CA Online Travel Bookers Who Used Online Resources When First Looking for Destination
Specific Need/Desire includes: Needed a vacation, Needed to get away, Wanted to compare destinations, and Necessity to find destination.
General/Passive includes: General interest, Saw a destination you liked, and Boredom. Advertising/Word of Mouth includes: Family/friend recommendations, TV ads, Internet ads, and Social media posts. Other not shown



TRAVEL IS A CONSIDERED & TIME CONSUMING PURCHASE FOR ONLINE TRAVEL BOOKERS

TRAVEL BOOKERS USE

>3

RESOURCE TYPES

THROUGHOUT THE DECISION PROCESS (ONLINE
& OFFLINE).

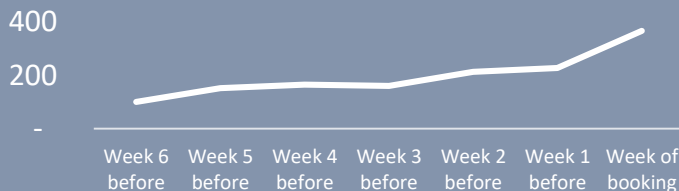
MILLENNIALS USE

13%

MORE RESOURCE
TYPES THAN
OVERALL BOOKERS.

Travel Engagement

Avg. Weekly Minutes per Booker



23 VISITS

NUMBER OF TRAVEL VISITS ON AVERAGE PER WEEK
ONLINE BOOKERS SPEND THROUGHOUT THE 45 DAYS
PRIOR TO BOOKING.

> 1 HR

AVERAGE TIME CANADIAN ONLINE BOOKERS SPENT
ON ONLINE TRAVEL AGENT SITES ON DESKTOP THE
WEEK OF BOOKING.

BOOKERS ARE ALMOST

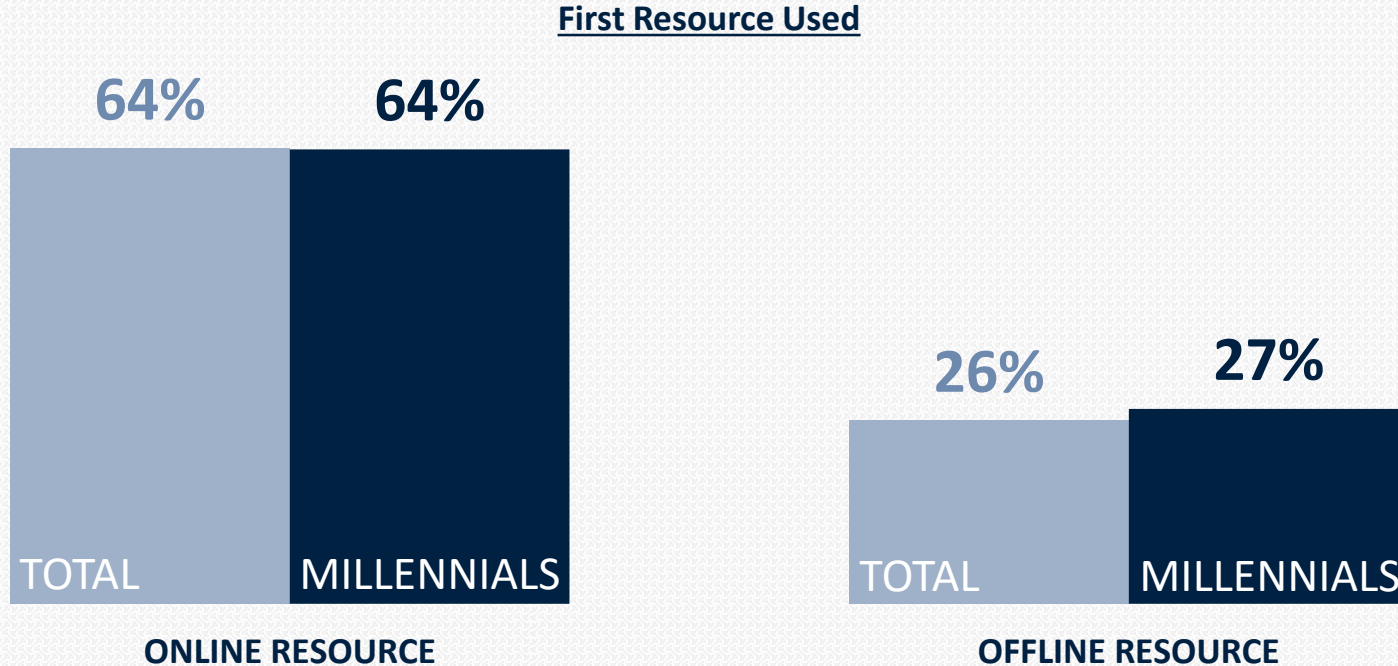
2X

MORE LIKELY TO BOOK AN
INTERNATIONAL TRIP
THAN A DOMESTIC TRIP.

Data Source: [Clockwise from top left] Boxes 1, 2: comScore Survey, RESOURCE. WHAT ARE ALL THE RESOURCES YOU USED PRIOR TO BOOKING YOUR MOST RECENT TRIP?, Among Total CA Online Travel Bookers (n=815), Millennials (n=275), Box 3, 5 & 6: comScore Canada Desktop Panel, Custom Path to Booking Visitation Analysis, Weekly Visits per User, Dec '15 – Feb '16. Box 4: BOOKPLACE. THINKING ABOUT YOUR MOST RECENT TRIP YOU HAVE BOOKED, WHERE IS THE DESTINATION?, Among Total CA Online Travel Bookers (n=815)



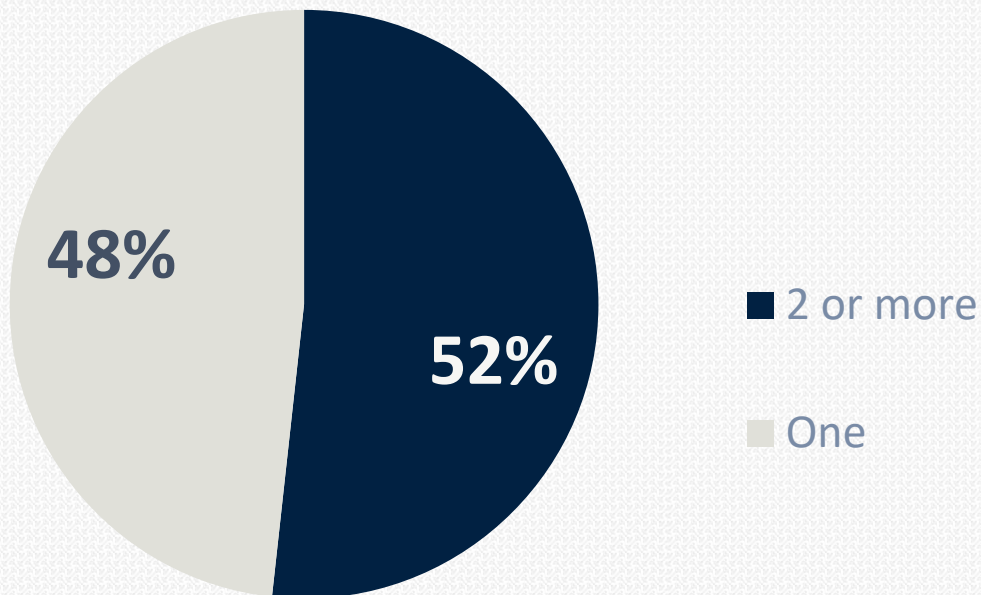
NEARLY TWO THIRDS OF TRAVEL BOOKERS BEGIN THEIR BOOKING PROCESS ONLINE





CLOSE TO TWO-THIRDS OF MILLENNIAL ONLINE TRAVEL BOOKERS START WITH MULTIPLE DESTINATIONS IN MIND

Number of Destinations Considered



63%
OF MILLENNIAL TRAVEL
BOOKERS CONSIDER 2+
DESTINATIONS.

Data Source: comScore Survey, DESTINATIONS. PRIOR TO DECIDING ON YOUR FINAL DESTINATION, HOW MANY OTHER DESTINATIONS DID YOU CONSIDER VISITING?, Among Total CA Online Travel Bookers (n=815), Millennials (n=275)



DESTINATION BOOKED

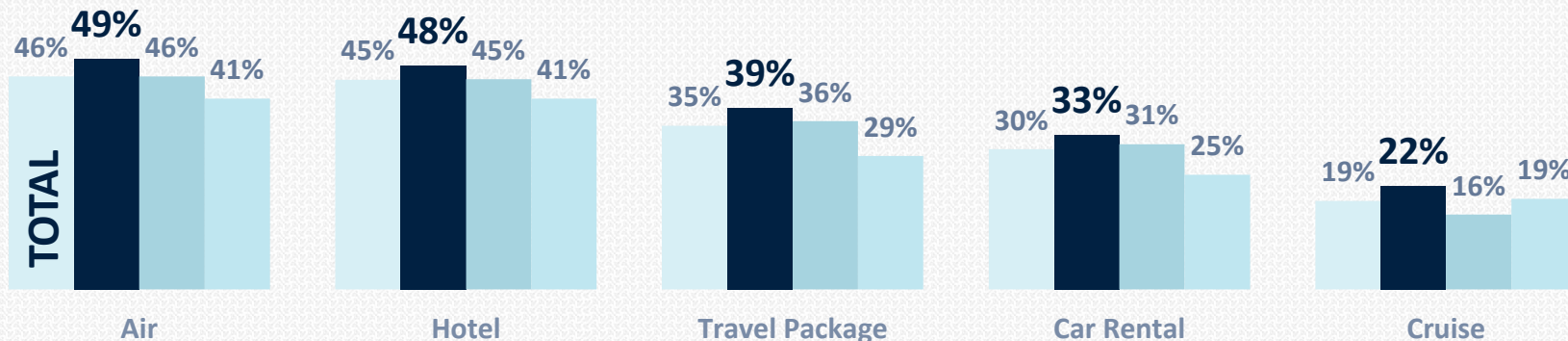




MILLENNIALS HAVE A HIGHER TENDENCY TO NOTICE TRAVEL ADS FOR TRAVEL PACKAGES AND CAR RENTALS COMPARED TO BABY BOOMERS

Advertising Awareness

■ Total ■ Millennials ■ Gen X ■ Baby Boomers



Data Source: comScore Survey, ADAWARE. DID YOU NOTICE ANY ADVERTISING RELATED TO THE FOLLOWING SERVICES WHILE YOU WERE SHOPPING FOR OR BOOKING YOUR TRAVEL? Among Total CA Online Travel Bookers (n=815)

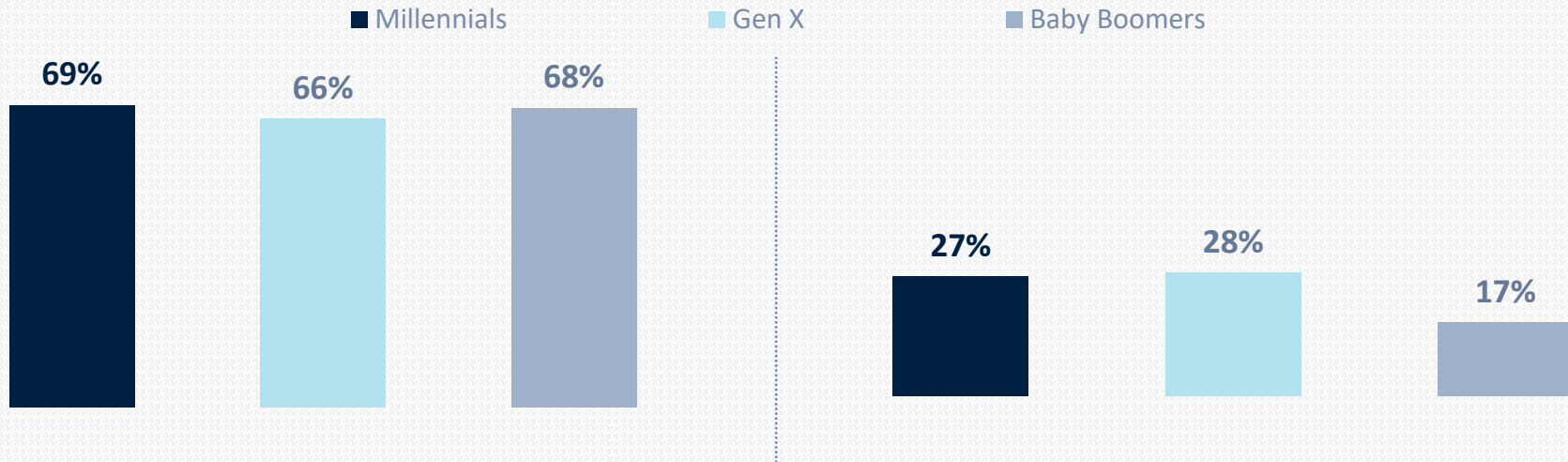
A/B/C letters indicate a significant difference between groups at a 95% confidence level.



MILLENNIALS AND GEN X TRAVELERS ARE MORE LIKELY THAN BABY BOOMERS TO HAVE THEIR DESTINATION INFLUENCED BY ADS

Advertising Recall

Destination Influenced by Advertising



Data Source: comScore Survey, ADRECALL. % YES - IN THE PAST 30 DAYS, HAVE YOU SEEN OR HEARD ADVERTISING FOR SPECIFIC TRAVEL DESTINATIONS?, Among Total CA Online Travel Bookers – By Age
DESTINATIONAD. % YES - DID ANY ADVERTISING INFLUENCE YOUR DECISION TO VISIT?, Among Total CA Online Travel Bookers – By Age
A/B/C letters indicate a significant difference between groups at a 95% confidence level.

THANK YOU

DOWNLOAD THE STUDY

<http://bit.ly/travelers-path-to-purchase>



www.advertising.expedia.com