

2015
PORTRAIT OF THE
U.S. MILLENNIAL
TRAVELER

—
RESONANCE
REPORT



RESONANCE SPECIALIZES IN STRATEGIC PLANNING, BRANDING AND MARKETING FOR DEVELOPERS, DESTINATIONS AND COMMUNITIES. THE PRINCIPALS OF RESONANCE HAVE MORE THAN 20 YEARS OF EXPERIENCE, AND HAVE CREATED AND MARKETED DOZENS OF BRANDS FOR DEVELOPERS AND DESTINATIONS THROUGHOUT NORTH AMERICA, MEXICO AND THE CARIBBEAN.

RECENT PROJECTS

- **INTERNATIONAL MARKET DEVELOPMENT STRATEGY FOR THE REPUBLIC OF IRELAND**
- **STRATEGIC PLAN FOR ARUBA TOURISM AUTHORITY**
- **TOURISM MASTER PLAN FOR CITY OF VANCOUVER**
- **BRAND VISION FOR FAYETTEVILLE, AR**
- **DESTINATION DEVELOPMENT AND COMPETITIVE IDENTITY FOR TULSA, OK**
- **DESTINATION DEVELOPMENT STRATEGY FOR CINCINNATI USA**

OUR RESEARCH

AS PART OF OUR ONGOING WORK TO CREATE SUCCESSFUL DEVELOPMENT STRATEGIES FOR A WIDE VARIETY OF DESTINATIONS AND DEVELOPMENTS, RESONANCE CONDUCTS CONSUMER RESEARCH TO HELP OUR CLIENTS UNDERSTAND THE EVOLVING PREFERENCES AND ASPIRATIONS OF CONSUMERS TODAY AND PUBLISHES REPORTS ON:

- **PORTRAIT OF THE U.S. INTERNATIONAL TRAVELER**
- **PORTRAIT OF THE U.S. MILLENNIAL TRAVELER**
- **PORTRAIT OF THE U.S. AFFLUENT TRAVELER**
- **U.S. RECREATIONAL REAL ESTATE REPORT**
- **U.S. RETIREE TRAVEL & REAL ESTATE REPORT**

TODAY'S AGENDA

- INTRODUCTION
- DEMOGRAPHICS
- DESTINATION DECISION FACTORS
- ACTIVITIES ON VACATION
- ACCOMMODATION PREFERENCES

INTRODUCTION



MILLENNIALS ARE MARKETERS' DREAMS, AND EVERYONE'S TRYING TO FIGURE THEM OUT FROM EVERY ANGLE.

- **THEY'RE SELFISH, AND THEY'RE SHARING**
- **THEY'RE LAZY AND THEY'RE ENTREPRENEURIAL**
- **THEY'RE "BOOMERANG" KIDS; YET BARELY OLD ENOUGH TO LEAVE HOME**

MILLENNIAL TRAVELERS DON'T EASILY FIT ANY SINGLE STEREOTYPE WE'VE HEARD ABOUT.

DEMOGRAPHICS: PROFILE OF THE U.S. MILLENNIAL TRAVELER



COMPARED TO GENERAL TRAVELERS, MILLENNIALS ARE LESS LIKELY TO OWN THEIR HOME, HAVE LOWER HOUSEHOLD INCOMES AND LOWER NET WORTH.

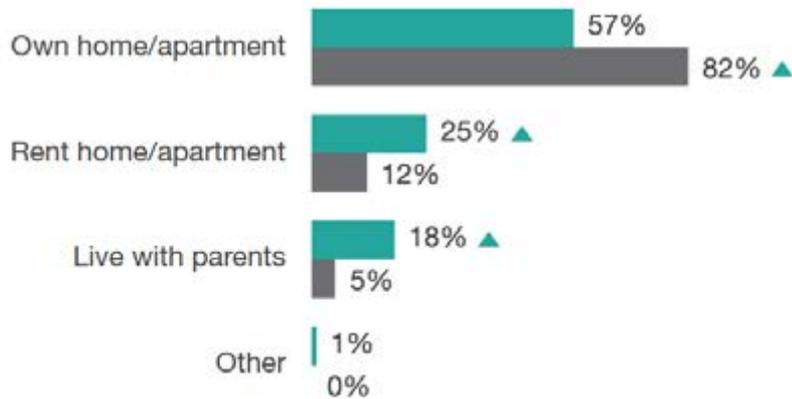
GENDER



HOUSEHOLD INCOME



PRIMARY RESIDENCE

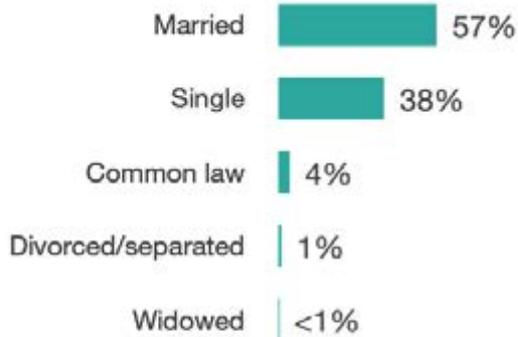


NET WORTH



MORE THAN HALF OF MILLENNIAL TRAVELERS HAVE CHILDREN IN THE HOUSEHOLD, WITH AN AVERAGE HOUSEHOLD SIZE OF 3.1 PEOPLE.

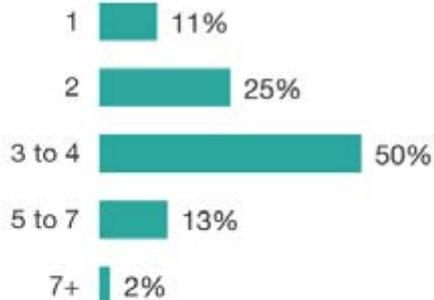
MARITAL STATUS



REGION

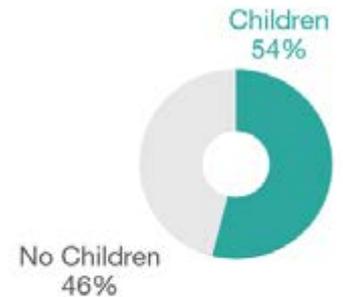
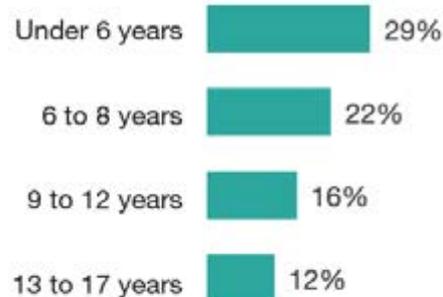


HOUSEHOLD SIZE



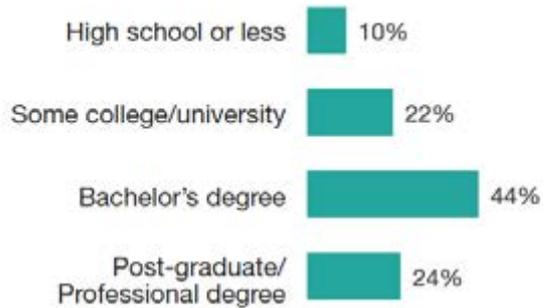
AVERAGE SIZE
3.1

CHILDREN IN HOUSEHOLD

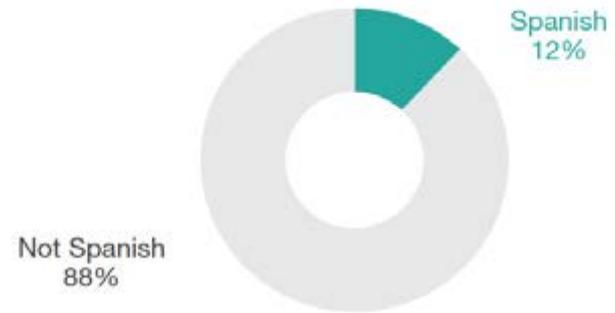


MOST MILLENNIAL TRAVELERS ARE WORKING FULL TIME AND HAVE A BACHELOR'S DEGREE OR HIGHER.

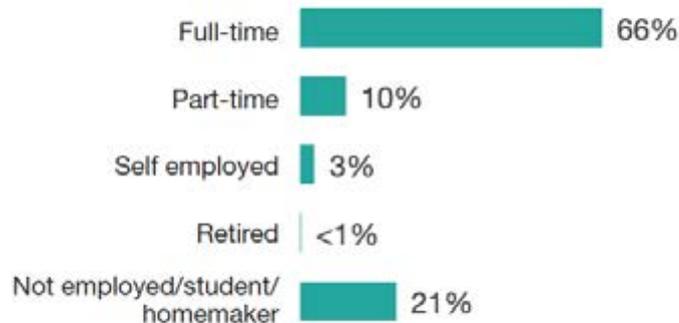
EDUCATION



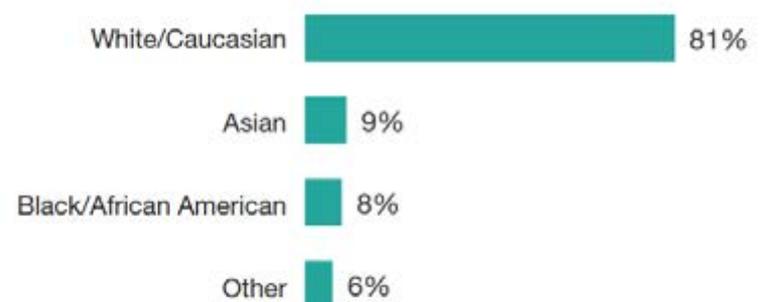
SPANISH



EMPLOYMENT STATUS



ETHNICITY



DESTINATION DECISION FACTORS



BEACH RESORTS, MAJOR METROPOLITAN CITIES, FAMILY VACATIONS WITH KIDS AND VACATIONS WITH FRIENDS ARE THE TOP VACATION TYPES.

TYPES OF FUTURE VACATIONS

		Household Income			Children		Vacation Spend		
		\$50-\$100K (n=568)	\$100-\$150K (n=212)	\$150K+ (n=221)	Yes (n=663)	No (n=556)	<\$500 (n=574)	\$50-\$1,500 (n=446)	\$1,500+ (n=169)
Visit to a beach resort	47%	45%	56%▲	52%	47%	47%	40%	51%▲	62%▲
Visit to a major metropolitan city	42%	40%	47%	51%▲	37%	48%▲	34%	47%▲	55%▲
Family vacation with kids	41%	44%	37%	39%	66%▲	12%	44%	38%	38%
Vacation with friends	40%	39%	41%	45%	37%	44%▲	37%	42%	45%
Multi-generational vacation	27%	24%	28%	33%▲	34%▲	20%	27%	28%	25%
Cruise	26%	26%	30%	30%	29%▲	22%	21%	29%▲	35%▲
Visit to a mountain resort	23%	22%	23%	30%▲	25%▲	20%	22%	21%	26%
Quiet countryside holiday	19%	18%	25%▲	25%▲	22%▲	17%	18%	19%	28%▲
Combining business trip with leisure vacation	19%	18%	19%	29%▲	22%▲	15%	16%	19%	27%▲
Other	6%	5%	3%	6%	3%	9%▲	6%	5%	5%

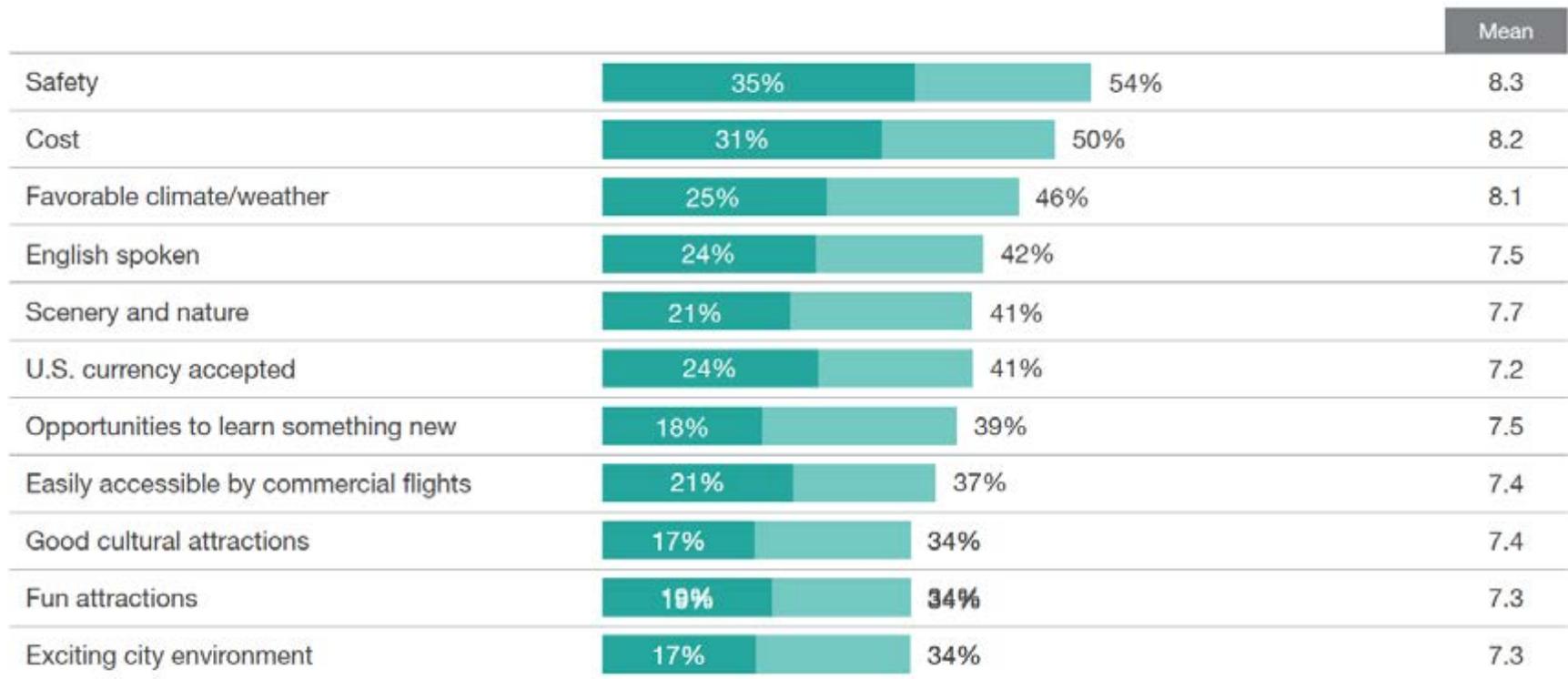
Base: All respondents (1,189)

A6. What types of vacations will you take in the next 12 – 24 months?

▲ Statistically significantly higher than comparison group(s)

SAFETY, COST AND FAVORABLE CLIMATE ARE THE MOST IMPORTANT FACTORS WHEN MILLENNIALS DECIDE ON A VACATION DESTINATION.

KEY DECISION FACTORS WHEN DECIDING ON A VACATION DESTINATION



Base: All respondents (n=1,189)

A7. On a scale of 1-10, what are the most important factors you take into account when deciding on a vacation destination, with 1 being not important at all and 10 being extremely important?

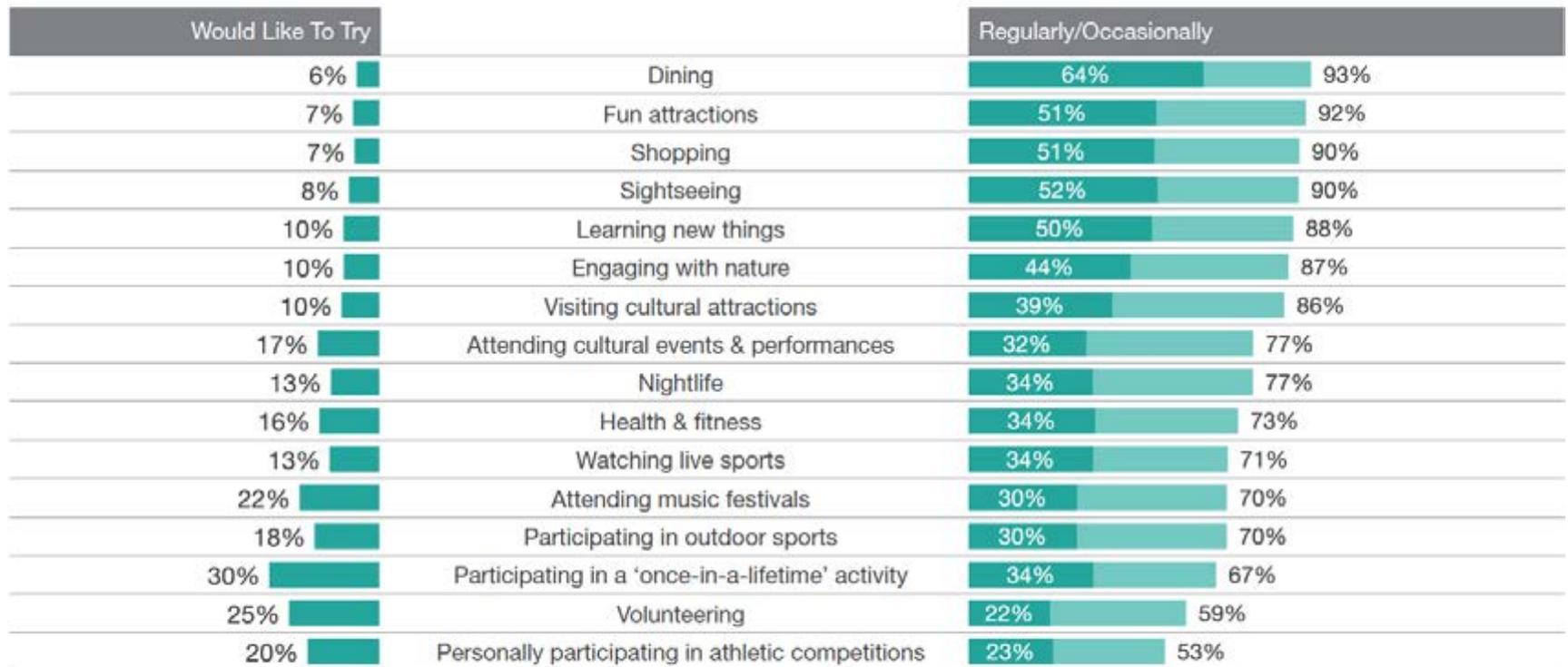
■ 10 – Extremely important ■ 9 – Very important

ACTIVITIES ON VACATION



AMONG MILLENNIAL TRAVELERS, DINING, FUN ATTRACTIONS, SHOPPING AND SIGHTSEEING ARE THE TOP ACTIVITIES WHILE ON VACATION. PARTICIPATING IN A ONCE-IN-A-LIFETIME ACTIVITY IS THE MOST DESIRED FUTURE ACTIVITY, FOLLOWED BY VOLUNTEERING.

ACTIVITIES ON VACATION



Base: All respondents (n=1,189)

A8. While on vacation what activities do you enjoy regularly, enjoy occasionally, would like to try, or do not enjoy?

Regularly Occasionally



**COMPARED TO ALL TRAVELERS,
MILLENNIAL TRAVELERS
ARE MORE LIKELY TO
PARTICIPATE IN MOST ACTIVITIES.**

**THE MOST NOTABLE DIFFERENCES ARE FOR
ATHLETIC COMPETITIONS, VOLUNTEERING,
ONCE-IN-A-LIFETIME ACTIVITY AND
OUTDOOR SPORTS.**





COMPARED TO ALL TRAVELERS, MILLENNIAL TRAVELERS ARE MORE LIKELY TO PARTICIPATE IN MOST ACTIVITIES. THE MOST NOTABLE DIFFERENCES ARE FOR ATHLETIC COMPETITIONS, VOLUNTEERING, ONCE-IN-A-LIFETIME ACTIVITY AND OUTDOOR SPORTS. PARENTS AND THOSE WITH HIGHER NET WORTH ARE MORE LIKELY TO PARTICIPATE IN MOST ACTIVITIES.

ACTIVITIES ON VACATION: SUB GROUP ANALYSIS

% Top-2-Box (Regularly/Occasionally)	All Travelers (n=3,379)	Millennial Travelers (n=1,189)	Gender		Children		Net Worth		
			Male (n=513)	Female (n=676)	Yes (n=633)	No (n=556)	<\$250K (n=673)	\$250-\$999K (n=360)	\$1M+ (n=97)
Dining	95%	93%	91%	96% ▲	92%	95%	94%	93%	91%
Fun attractions	87%	92% ▲	89%	94% ▲	93% ▲	90%	91%	93%	94%
Shopping	84%	90% ▲	87%	93% ▲	93% ▲	86%	90%	89%	91%
Sightseeing	94% ▲	90%	87%	93% ▲	91%	88%	89%	92% ▲	90%
Learning new things	88%	88%	87%	90%	90%	87%	87%	91% ▲	89%
Engaging with nature	83%	87% ▲	86%	89%	89% ▲	84%	86%	88%	93% ▲
Visiting cultural attractions	85%	86%	85%	87%	88% ▲	84%	84%	89% ▲	91%
Attending cultural events & performances	79%	77%	79%	76%	80% ▲	75%	73%	85% ▲	88% ▲
Nightlife	67%	77% ▲	81% ▲	74%	81% ▲	73%	74%	85% ▲	87% ▲
Health & fitness	60%	73% ▲	78% ▲	68%	76%	71%	69%	80% ▲	80% ▲
Watching live sports	60%	71% ▲	82% ▲	59%	76% ▲	64%	67%	78% ▲	76%
Attending music festivals	63%	70% ▲	74% ▲	67%	73% ▲	67%	68%	78% ▲	70%
Participating in outdoor sports	57%	70% ▲	79% ▲	62%	75% ▲	64%	66%	80% ▲	77% ▲
Participating in a 'once-in-a-lifetime' activity	52%	67% ▲	73% ▲	62%	72% ▲	62%	62%	78% ▲	76% ▲
Volunteering	43%	59% ▲	67% ▲	51%	66% ▲	52%	54%	68% ▲	71% ▲
Personally participating in athletic competitions	31%	53% ▲	69% ▲	38%	63% ▲	42%	45%	67% ▲	70% ▲

Base: All respondents

A8. While on vacation what activities do you enjoy regularly, enjoy occasionally, would like to try, or do not enjoy?

▲ Statistically significantly higher than comparison group(s)

LOCAL CASUAL RESTAURANTS, FAMILIAR CASUAL CHAINS AND FAST FOOD ARE THE TOP DINING OPTIONS MILLENNIALS ENJOY WHILE ON VACATION.



Diner

**FOR FUN ATTRACTIONS, ZOOS, THEME
PARKS AND AQUARIUMS ARE THE MOST
COMMON ACTIVITIES.**



**SHOPPING MALLS AND DEPARTMENT
STORES ARE THE MOST POPULAR
FOR SHOPPING VENUES.**





LOCAL CASUAL RESTAURANTS, FAMILIAR CASUAL CHAINS AND FAST FOOD ARE THE TOP DINING OPTIONS MILLENNIALS ENJOY WHILE ON VACATION. FOR FUN ATTRACTIONS, ZOOS, THEME PARKS AND AQUARIUMS ARE THE MOST COMMON ACTIVITIES. SHOPPING MALLS AND DEPARTMENT STORES ARE THE MOST POPULAR FOR SHOPPING VENUES.

SPECIFIC ACTIVITIES ON VACATION

% Enjoy Regularly/Occasionally	All Travelers (n=3,376)	Millennial Travelers (n=1,189)	Gender		Net Worth		
			Male (n=513)	Female (n=675)	<\$250K (n=673)	\$250-\$999K (n=360)	\$1M+ (n=96)
Dining							
Local casual restaurants/cafes	93% ▲	87%	83%	91% ▲	88%	86%	89%
Familiar casual chain restaurants	82%	82%	81%	84%	84%	80%	79%
Fast food	70%	80% ▲	82%	79%	81%	81%	80%
Local ethnic restaurants	79% ▲	76%	75%	77%	73%	81% ▲	84% ▲
Local upscale restaurants	78% ▲	75%	77%	73%	71%	81% ▲	87% ▲
Familiar upscale chain restaurants	71%	73%	75% ▲	70%	69%	79% ▲	83% ▲
Fine dining	63%	67% ▲	74% ▲	60%	59%	78% ▲	85% ▲
Fun Attractions							
Zoos	81%	83%	81%	86% ▲	85%	82%	82%
Theme parks	70%	81% ▲	81%	81%	81%	83%	85%
Aquariums	80%	80%	78%	82%	80%	82%	82%
Water parks	58%	76% ▲	76%	76%	75%	80%	80%
Science centers	69%	72% ▲	71%	72%	70%	76% ▲	81% ▲
Ferris wheel	53%	69% ▲	70%	69%	68%	72%	82% ▲
Shopping							
Shopping malls	84%	85%	79%	90% ▲	86%	83%	82%
Department stores	83%	84%	81%	87% ▲	84%	86%	87%
Shops featuring locally made goods	81% ▲	78%	77%	78%	75%	83% ▲	84% ▲
Small boutiques	75%	74%	71%	77% ▲	72%	78% ▲	83% ▲
Art galleries	59%	59%	64% ▲	54%	52%	71% ▲	72% ▲
Luxury brands	50%	58% ▲	65% ▲	50%	51%	69% ▲	79% ▲

Base: All respondents

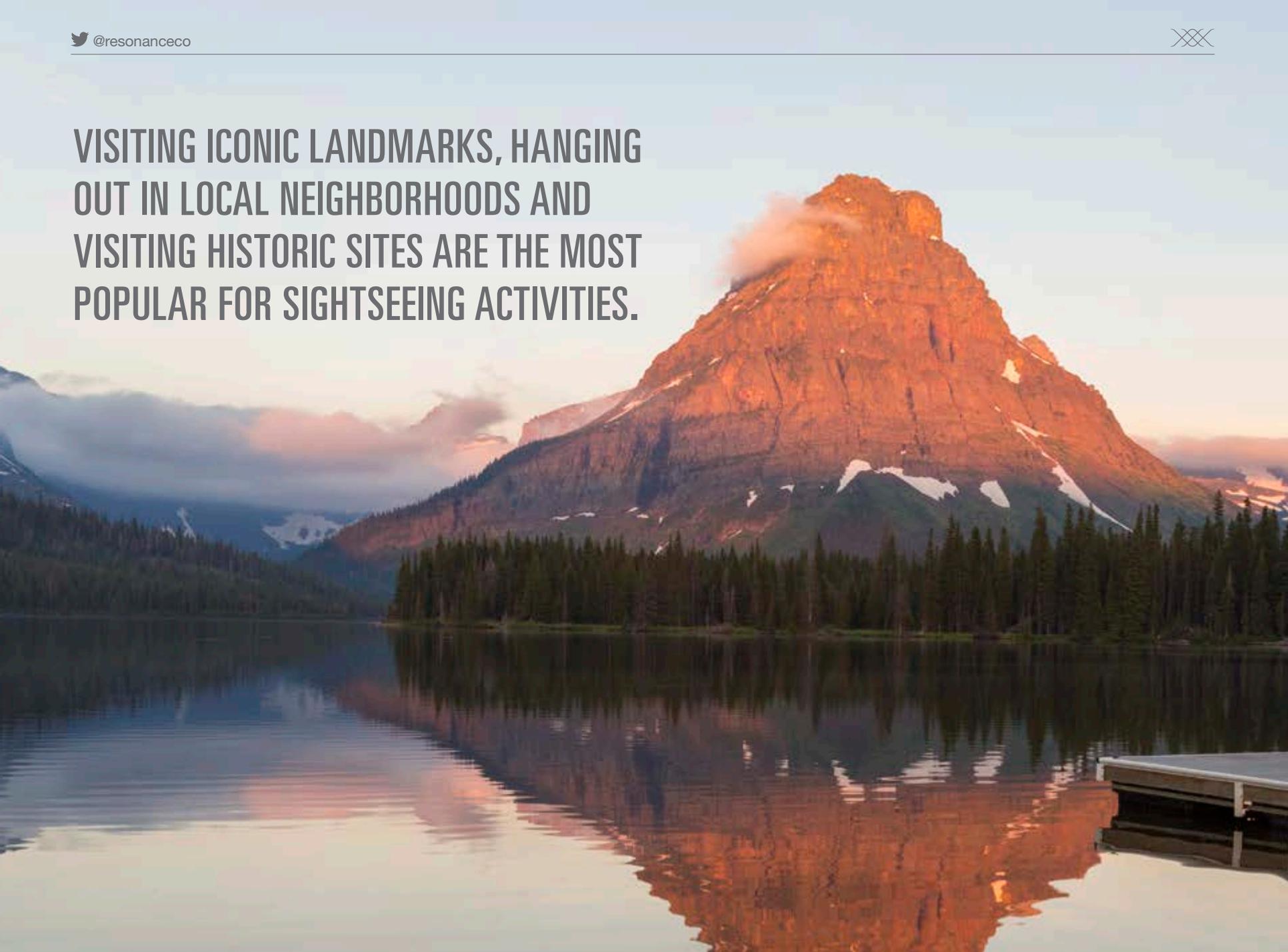
A9. Now more specifically, which of the following activities do you enjoy regularly, enjoy occasionally or would like to try?

▲ Statistically significantly higher than comparison group(s)

**WALKING, HIKING AND PICNICS
ARE THE TOP NATURE ACTIVITIES
AMONG MILLENNIALS.**



**VISITING ICONIC LANDMARKS, HANGING
OUT IN LOCAL NEIGHBORHOODS AND
VISITING HISTORIC SITES ARE THE MOST
POPULAR FOR SIGHTSEEING ACTIVITIES.**





WALKING, HIKING AND PICNICS ARE THE TOP NATURE ACTIVITIES AMONG MILLENNIALS, WHILE VISITING ICONIC LANDMARKS, HANGING OUT IN LOCAL NEIGHBORHOODS AND VISITING HISTORIC SITES ARE THE MOST POPULAR FOR SIGHTSEEING ACTIVITIES.

SPECIFIC ACTIVITIES ON VACATION (CONT'D)

% Enjoy Regularly/Occasionally	All Travelers (n=3,376)	Millennial Travelers (n=1,189)	Gender		Net Worth		
			Male (n=513)	Female (n=675)	<\$250K (n=673)	\$250-\$999K (n=360)	\$1M+ (n=96)
Engaging with Nature							
Walking	89% ▲	85%	81%	89% ▲	85%	85%	89%
Hiking	69%	78% ▲	81% ▲	74%	75%	83% ▲	92% ▲
Picnics	72%	76% ▲	77%	75%	73%	82% ▲	82%
Wild animal viewing	62%	65%	71% ▲	59%	61%	74% ▲	74% ▲
Bird watching	42%	50% ▲	59% ▲	40%	43%	61% ▲	68% ▲
Sightseeing							
Visiting iconic landmarks	79% ▲	74%	76%	73%	70%	83% ▲	83% ▲
Walking/hanging out in local neighborhoods	73%	74%	75%	74%	71%	79% ▲	88% ▲
Visiting historic sites/monuments	80% ▲	74%	77% ▲	71%	69%	83% ▲	84% ▲
Visiting interesting architectural buildings	68%	67%	72% ▲	62%	62%	75% ▲	86% ▲
Visiting historic homes/gardens	70%	67%	70%	64%	62%	75% ▲	84% ▲
Botanical gardens	70%	67%	69%	64%	61%	76% ▲	83% ▲
Scenic gondolas/observatories/viewpoints	68%	65%	69% ▲	61%	59%	74% ▲	84% ▲
Participating in organized tours	54%	59% ▲	64% ▲	54%	52%	70% ▲	72% ▲

Base: All respondents

A9. Now more specifically, which of the following activities do you enjoy regularly, enjoy occasionally or would like to try?

▲ Statistically significantly higher than comparison group(s)

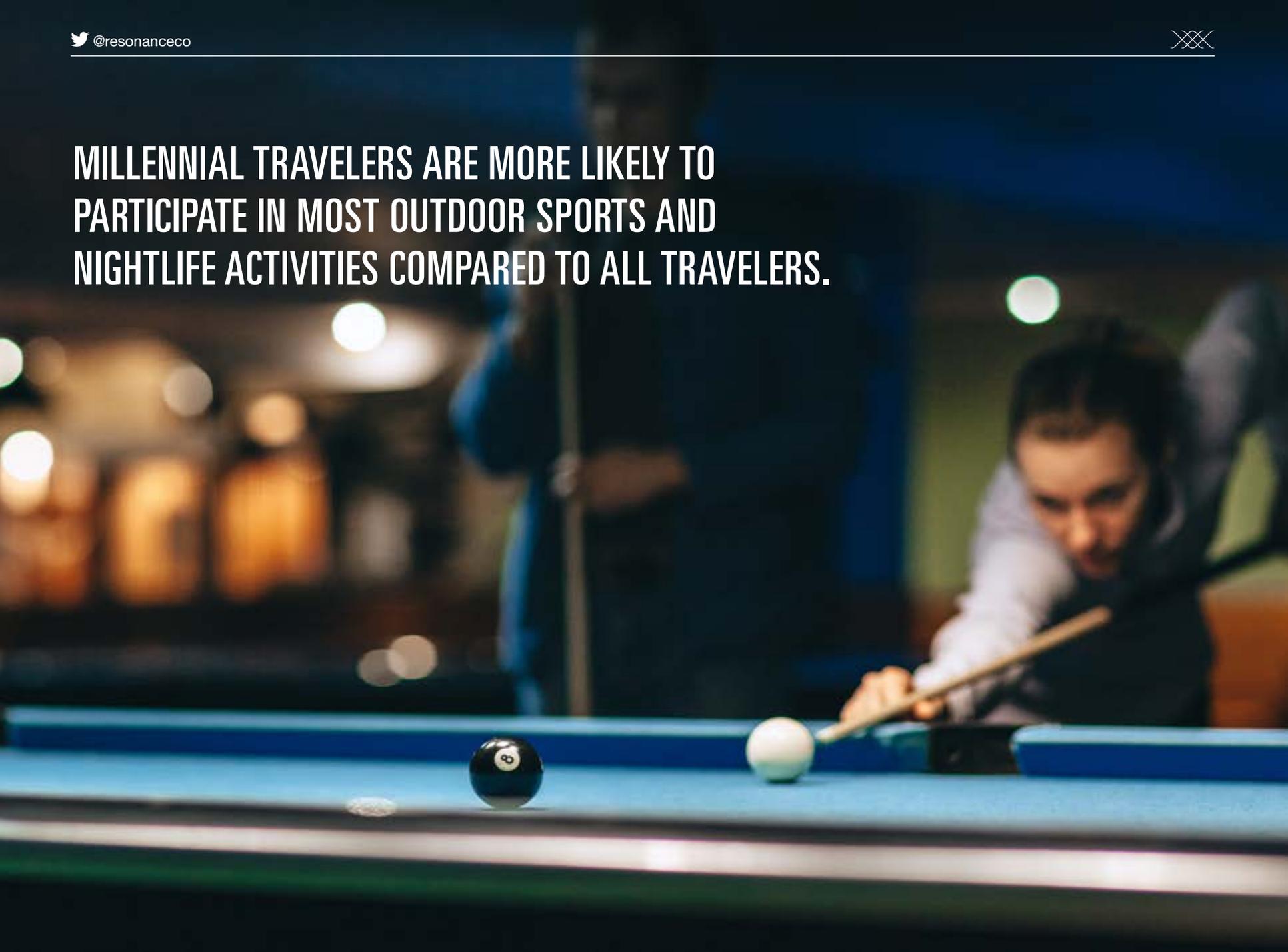
**FOR OUTDOOR SPORTS, SWIMMING AT A
BEACH/POOL IS THE TOP ACTIVITY.**



MAJOR LIVE CONCERTS, SMALL LIVE MUSIC VENUES AND SPORTS BARS ARE THE MAIN NIGHTLIFE ACTIVITIES.



MILLENNIAL TRAVELERS ARE MORE LIKELY TO PARTICIPATE IN MOST OUTDOOR SPORTS AND NIGHTLIFE ACTIVITIES COMPARED TO ALL TRAVELERS.





FOR OUTDOOR SPORTS, SWIMMING AT A BEACH/POOL IS THE TOP ACTIVITY, WHILE MAJOR LIVE CONCERTS, SMALL LIVE MUSIC VENUES AND SPORTS BARS ARE THE MAIN NIGHTLIFE ACTIVITIES. MILLENNIAL TRAVELERS ARE MORE LIKELY TO PARTICIPATE IN MOST OUTDOOR SPORTS AND NIGHTLIFE ACTIVITIES COMPARED TO ALL TRAVELERS.

SPECIFIC ACTIVITIES ON VACATION (CONT'D)

% Enjoy Regularly/Occasionally	All Travelers (n=3,376)	Millennial Travelers (n=1,189)	Gender		Net Worth		
			Male (n=513)	Female (n=675)	<\$250K (n=673)	\$250-\$999K (n=360)	\$1M+ (n=96)
Participating in Outdoor Sports							
Swimming at a beach or resort pools	78% ▲	75%	75%	75%	73%	80% ▲	77%
Jogging	51%	68% ▲	74% ▲	61%	64%	74% ▲	79% ▲
Boating/sailing	53%	59% ▲	64% ▲	53%	54%	68% ▲	67% ▲
Watersports	41%	57% ▲	62% ▲	51%	49%	69% ▲	72% ▲
Hunting/fishing	45%	56% ▲	64% ▲	47%	51%	66% ▲	69% ▲
Tennis	42%	56% ▲	64% ▲	46%	49%	66% ▲	69% ▲
Cycling	52%	56% ▲	62% ▲	48%	48%	68% ▲	66% ▲
Skiing/snowboarding	40%	55% ▲	63% ▲	46%	47%	67% ▲	75% ▲
Scuba diving/snorkeling	42%	53% ▲	61% ▲	44%	44%	68% ▲	71% ▲
Horseback riding	42%	53% ▲	57% ▲	47%	45%	64% ▲	68% ▲
Mountain biking	35%	50% ▲	60% ▲	39%	43%	61% ▲	67% ▲
Golf	46%	49%	61% ▲	35%	40%	63% ▲	63% ▲
Extreme sports	28%	47% ▲	56% ▲	37%	39%	60% ▲	60% ▲
Nightlife							
Major live concerts	70%	73% ▲	75%	72%	71%	76%	83% ▲
Small live music venues	66%	71% ▲	74% ▲	67%	67%	77% ▲	78% ▲
Sports bars	62%	70% ▲	74% ▲	65%	68%	74%	76%
Casinos	68%	69%	74% ▲	63%	67%	73%	74%
Nightclubs with dancing	53%	66% ▲	71% ▲	60%	62%	70% ▲	78% ▲
Comedy clubs	56%	62% ▲	71% ▲	53%	56%	70% ▲	78% ▲
Wine bars	56%	62% ▲	67% ▲	57%	55%	73% ▲	77% ▲
Microbreweries	53%	61% ▲	69% ▲	53%	55%	70% ▲	78% ▲

Base: All respondents

A9. Now more specifically, which of the following activities do you enjoy regularly, enjoy occasionally or would like to try?

▲ Statistically significantly higher than comparison group(s)

**GOING TO SEE PLAYS/MUSICALS
AND LOCAL COMMUNITY EVENTS ARE
THE TOP CULTURAL EVENTS.**





**HISTORY MUSEUMS AND ART MUSEUMS ARE
THE MOST POPULAR CULTURAL ATTRACTIONS.**

**WORKING OUT IS MOST COMMON
UNDER HEALTH & FITNESS.**



MILLENNIALS ARE MORE LIKELY TO PARTICIPATE IN ALL HEALTH AND FITNESS ACTIVITIES COMPARED TO ALL TRAVELERS.





GOING TO SEE PLAYS/MUSICALS AND LOCAL COMMUNITY EVENTS ARE THE TOP CULTURAL EVENTS, WHILE HISTORY MUSEUMS AND ART MUSEUMS ARE THE MOST POPULAR CULTURAL ATTRACTIONS. WORKING OUT IS MOST COMMON UNDER HEALTH AND FITNESS. MILLENNIALS ARE MORE LIKELY TO PARTICIPATE IN ALL HEALTH AND FITNESS ACTIVITIES COMPARED TO ALL TRAVELERS.

SPECIFIC ACTIVITIES ON VACATION (CONT'D)

% Enjoy Regularly/Occasionally	All Travelers (n=3,376)	Millennial Travelers (n=1,189)	Gender		Net Worth		
			Male (n=513)	Female (n=675)	<\$250K (n=673)	\$250-\$999K (n=360)	\$1M+ (n=96)
Attending Cultural Events & Performances							
Going to see plays or musicals	72% ▲	67%	67%	66%	62%	74% ▲	83% ▲
Local neighborhood/community events	70% ▲	66%	66%	65%	62%	73% ▲	73% ▲
Food & wine festival	57%	59%	65% ▲	54%	52%	71% ▲	83% ▲
Art festival	56%	58%	65% ▲	51%	51%	70% ▲	70% ▲
Attending the symphony/opera/ballet	50%	54% ▲	60% ▲	47%	47%	65% ▲	72% ▲
Comedy festival	40%	52% ▲	61% ▲	42%	44%	65% ▲	68% ▲
Cirque du Soleil	44%	51% ▲	59% ▲	42%	44%	62% ▲	71% ▲
Film festival	37%	49% ▲	60% ▲	39%	41%	64% ▲	68% ▲
Fashion show	28%	46% ▲	56% ▲	36%	39%	59% ▲	63% ▲
Visiting Cultural Attractions							
History museums	81% ▲	75%	78% ▲	72%	70%	84% ▲	85% ▲
Museums & galleries	75% ▲	72%	73%	70%	67%	79% ▲	80% ▲
Churches & religious sites	60%	59%	64% ▲	55%	52%	69% ▲	74% ▲
Health & Fitness							
Working out	76%	79% ▲	80%	78%	76%	83% ▲	92% ▲
Spa treatments	52%	60% ▲	62%	58%	52%	74% ▲	76% ▲
Yoga	39%	57% ▲	58%	56%	52%	65% ▲	74% ▲
Meditation	37%	51% ▲	57% ▲	43%	45%	58% ▲	70% ▲
Weight loss programs	33%	47% ▲	56% ▲	38%	41%	59% ▲	61% ▲
Medical treatments	29%	45% ▲	54% ▲	35%	38%	56% ▲	60% ▲

Base: All respondents

A9. Now more specifically, which of the following activities do you enjoy regularly, enjoy occasionally or would like to try?

▲ Statistically significantly higher than comparison group(s)



**POPULAR MUSIC IS AT THE
TOP FOR MUSIC FESTIVALS.**

**NATIONAL FOOTBALL LEAGUE AND
MAJOR LEAGUE BASEBALL GAMES ARE THE
MOST POPULAR LIVE SPORTS EVENTS.**





POPULAR MUSIC IS AT THE TOP FOR MUSIC FESTIVALS, WHILE NATIONAL FOOTBALL LEAGUE AND MAJOR LEAGUE BASEBALL GAMES ARE THE MOST POPULAR LIVE SPORTS EVENTS.

SPECIFIC ACTIVITIES ON VACATION (CONT'D)

% Enjoy Regularly/Occasionally	All Travelers (n=3,376)	Millennial Travelers (n=1,189)	Gender		Net Worth		
			Male (n=513)	Female (n=675)	<\$250K (n=673)	\$250-\$999K (n=360)	\$1M+ (n=96)
Attending Music Festivals							
Popular music	65%	70% ▲	72%	68%	65%	80% ▲	83% ▲
Independent	40%	56%	64% ▲	47%	50%	64% ▲	79% ▲
Country music	48%	55% ▲	61% ▲	48%	48%	66% ▲	69% ▲
Classical	48%	53% ▲	62% ▲	44%	46%	65% ▲	71% ▲
Electronic dance	27%	50% ▲	60% ▲	39%	42%	61% ▲	71% ▲
Jazz	47%	49%	57% ▲	41%	42%	62% ▲	66% ▲
Blues	46%	49%	58% ▲	40%	41%	63% ▲	67% ▲
Watching Live Sports							
National Football League	70%	70%	80% ▲	57%	68%	72%	83% ▲
Major League Baseball	70%	67%	74% ▲	57%	64%	70%	77% ▲
NCAA Football	58%	61%	71% ▲	49%	59%	64%	76% ▲
National Basketball Association	48%	58% ▲	70% ▲	44%	55%	62% ▲	70% ▲
Olympics	50%	58% ▲	67% ▲	46%	55%	62% ▲	75% ▲
NCAA Basketball	51%	56% ▲	66% ▲	45%	52%	63% ▲	73% ▲
National Hockey League	48%	56% ▲	65% ▲	46%	50%	65% ▲	73% ▲
World Cup Soccer	36%	54% ▲	66% ▲	38%	46%	65% ▲	71% ▲
Tennis	37%	51% ▲	62% ▲	37%	45%	59% ▲	67% ▲
Major League Soccer	31%	50% ▲	62% ▲	35%	44%	58% ▲	72% ▲
X-Games	27%	48% ▲	61% ▲	32%	42%	57% ▲	67% ▲
Horse racing	42%	48% ▲	56% ▲	37%	41%	57% ▲	65% ▲
Auto racing	38%	48% ▲	59% ▲	34%	42%	56% ▲	63% ▲
Golf	44%	47%	58% ▲	33%	38%	59% ▲	66% ▲

Base: All respondents

A9. Now more specifically, which of the following activities do you enjoy regularly, enjoy occasionally or would like to try?

▲ Statistically significantly higher than comparison group(s)

FAMILY VACATIONS TO DISNEY AND TRIPS TO LUXURY CASINOS/SHOWS IN LAS VEGAS ARE THE TOP ONCE-IN-A-LIFETIME ACTIVITIES FOR MILLENNIALS.



**WINE TASTINGS ARE THE
MOST POPULAR FOR
LEARNING NEW THINGS.**



ROAD RACES/MARATHONS ARE AT THE TOP FOR ATHLETIC COMPETITIONS.





FAMILY VACATIONS TO DISNEY AND TRIPS TO LUXURY CASINOS/ SHOWS IN LAS VEGAS ARE THE TOP ONCE-IN-A-LIFETIME ACTIVITIES FOR MILLENNIALS, WHILE WINE TASTINGS ARE THE MOST POPULAR FOR LEARNING NEW THINGS. ROAD RACES/ MARATHONS ARE AT THE TOP FOR ATHLETIC COMPETITIONS.

SPECIFIC ACTIVITIES ON VACATION (CONT'D)

% Enjoy Regularly/Occasionally	All Travelers (n=3,376)	Millennial Travelers (n=1,189)	Gender		Net Worth		
			Male (n=513)	Female (n=675)	<\$250K (n=673)	\$250-\$999K (n=360)	\$1M+ (n=96)
Participating in a 'Once-in-a-Lifetime' Activity							
Family vacation to Disney	53%	60% ▲	65% ▲	55%	55%	68% ▲	72% ▲
Trip to luxury casino/shows in Las Vegas	48%	53% ▲	65% ▲	41%	44%	67% ▲	72% ▲
Tour through wine country	37%	44% ▲	56% ▲	33%	36%	58% ▲	67% ▲
Spa retreat	27%	42% ▲	54% ▲	30%	33%	58% ▲	58% ▲
Cruise on luxury liner	29%	41% ▲	53% ▲	29%	31%	56% ▲	61% ▲
Visiting a rare/remote landscape	26%	40% ▲	51% ▲	30%	31%	56% ▲	56% ▲
Train trip on the Orient Express/Rocky Mountaineer	26%	38% ▲	51% ▲	25%	29%	51% ▲	58% ▲
Safari in Africa	23%	37% ▲	49% ▲	24%	28%	51% ▲	52% ▲
Learning New Things							
Wine tastings	54%	59% ▲	66% ▲	52%	51%	72% ▲	78% ▲
Art/craft making classes	33%	50% ▲	56% ▲	44%	45%	59% ▲	65% ▲
Lectures/symposiums	39%	49% ▲	59% ▲	39%	43%	61% ▲	67% ▲
Cooking classes	34%	47% ▲	56% ▲	38%	39%	61% ▲	68% ▲
Language classes	24%	44% ▲	55% ▲	34%	37%	56% ▲	63% ▲
Personal Participation in Athletic Competitions							
Road races/marathons	38%	51% ▲	55% ▲	44%	43%	61% ▲	69% ▲
Adventure races	32%	48% ▲	53% ▲	41%	41%	59% ▲	63% ▲
Swimming competitions	31%	47% ▲	54% ▲	37%	38%	62% ▲	60% ▲
Cycling competitions	32%	45% ▲	52% ▲	34%	35%	59% ▲	59% ▲
IronMan/triathlons	29%	44% ▲	50% ▲	35%	35%	57% ▲	57% ▲

Base: All respondents

A9. Now more specifically, which of the following activities do you enjoy regularly, enjoy occasionally or would like to try?

▲ Statistically significantly higher than comparison group(s)



ACCOMMODATION PREFERENCES

FULL SERVICE HOTELS/RESORTS ARE THE MOST PREFERRED ACCOMMODATIONS AMONG MILLENNIAL TRAVELERS, FOLLOWED BY ALL INCLUSIVES, UPSCALE/LUXURY HOTELS/RESORTS AND STAYING WITH FRIENDS/FAMILY.

ACCOMMODATION PREFERENCES

		Gender		Household Income			Children	
		Male (n=513)	Female (n=675)	\$50-\$100K (n=568)	\$100-\$150K (n=212)	\$150K+ (n=221)	Yes (n=633)	No (n=556)
Full service hotel/resort	58%	52%	63% ▲	57%	54%	57%	58%	57%
All-inclusive resort	40%	37%	42%	39%	45%	38%	40%	40%
Upscale/luxury hotel/resort	39%	38%	40%	38%	39%	48% ▲	38%	40%
Stay with friends or family	37%	33%	41% ▲	35%	42% ▲	31%	36%	39%
House/villa rental	30%	26%	34% ▲	29%	32%	34%	33% ▲	27%
Cruise ship	28%	30%	27%	27%	35% ▲	30%	33% ▲	23%
Limited service/economy hotel/resort	25%	23%	26%	26% ▲	20%	19%	26%	23%
Camping	24%	27% ▲	21%	24%	25%	21%	27% ▲	20%
B&B/small inn	22%	18%	25% ▲	18%	25% ▲	26% ▲	23%	20%
Apartment/condominium rental	22%	21%	23%	21%	22%	25%	24% ▲	19%
Timeshare condo/home	20%	21%	20%	20%	19%	22%	22%	18%
Hostel	13%	16% ▲	10%	12%	17%	17%	15% ▲	10%
Airbnb or other room/home sharing service	11%	12%	11%	11%	11%	16%	12%	10%
Other	1%	1%	1%	1%	1%	3%	<1%	2%

Base: All respondents (n=1,189)

A11. While on vacation, what kind of accommodation do you prefer?

▲ Statistically significantly higher than comparison group(s)

FREE INTERNET ACCESS IS THE MOST DESIRABLE HOTEL AMENITY, FOLLOWED BY PRIVACY, BEACH AND SWIMMING POOL.

DESIRABLE HOTEL AMENITIES

			Mean
Free Internet access	39%	58%	8.4
Privacy	29%	48%	8.1
Beach	25%	42%	7.7
Swimming pool	23%	42%	7.7
Walking distance to shopping/restaurants	22%	40%	7.9
Proximity to must-see attractions	20%	39%	7.8
Unique activities/experiences	20%	37%	7.6
Hotel restaurant	17%	34%	7.3
All-inclusive packages	19%	33%	7.2
Within walking distance of public transportation	19%	33%	7.2
Nightlife/entertainment	16%	32%	7.0
Lobby lounge and bar	18%	32%	7.0
Suites with kitchenettes	17%	31%	7.1
Fitness center	16%	30%	6.8

Base: All respondents

A12. On a scale of 1-10, rate the desirability of each of the following features and amenities when choosing a place to stay on your vacation, with 1 being "not desirable" and 10 being "very desirable."

■ 10 – Extremely important ■ 9 – Very important

BUSINESS CENTER, GOLF COURSE AND TENNIS ARE THE LEAST DESIRABLE HOTEL AMENITIES.

DESIRABLE HOTEL AMENITIES (CONT'D)

			Mean
Walking trails	16%	30%	7.0
Interior design/style	16%	30%	7.1
Spa facilities & programming	15%	29%	6.7
Eco-friendliness	14%	28%	6.8
In-room dining	14%	28%	6.9
Concierge service	15%	27%	6.6
Hotel affiliations	14%	27%	6.6
Kids' programs	14%	27%	5.9
Casino	13%	27%	6.2
Wellness programs	13%	25%	6.1
Valet parking	12%	24%	5.9
Tennis	10%	22%	5.5
Golf course	9%	22%	5.3
Business center	11%	21%	5.7

Base: All respondents

A12. On a scale of 1-10, rate the desirability of each of the following features and amenities when choosing a place to stay on your vacation, with 1 being "not desirable" and 10 being "very desirable."

■ 10 – Extremely important ■ 9 – Very important



DISTINCT
SEGMENTS
OF MILLENNIAL
TRAVELERS

A woman with her hair in a bun, wearing sunglasses and a beige trench coat, stands on a stone ledge overlooking a city at sunset. The background is blurred, showing a tall tower and street lamps. A small red dot is positioned above the text.

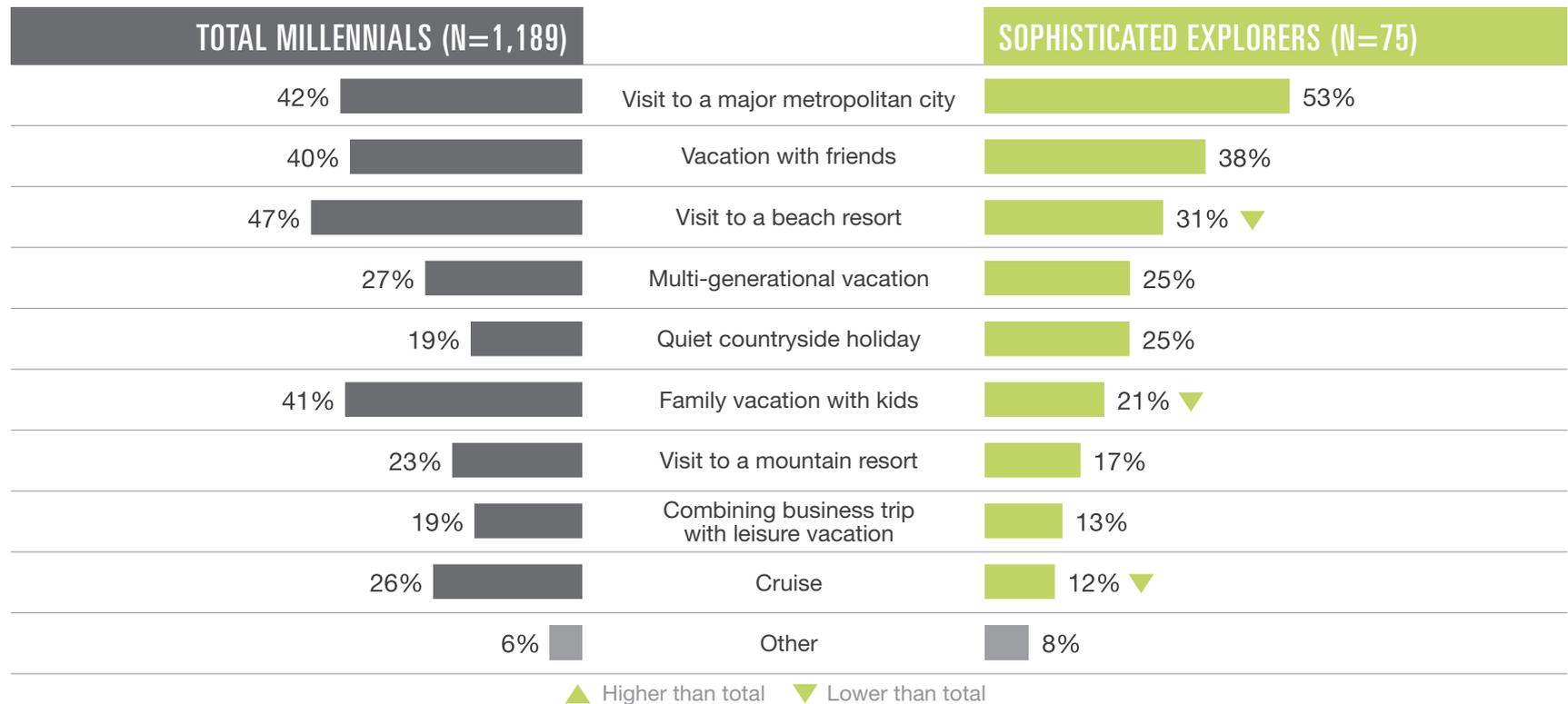
SEGMENT 1:
SOPHISTICATED
EXPLORERS



SOPHISTICATED EXPLORERS ARE LESS LIKELY TO VISIT BEACH RESORTS, GO ON FAMILY VACATIONS WITH KIDS OR CRUISES.



TYPES OF FUTURE VACATIONS



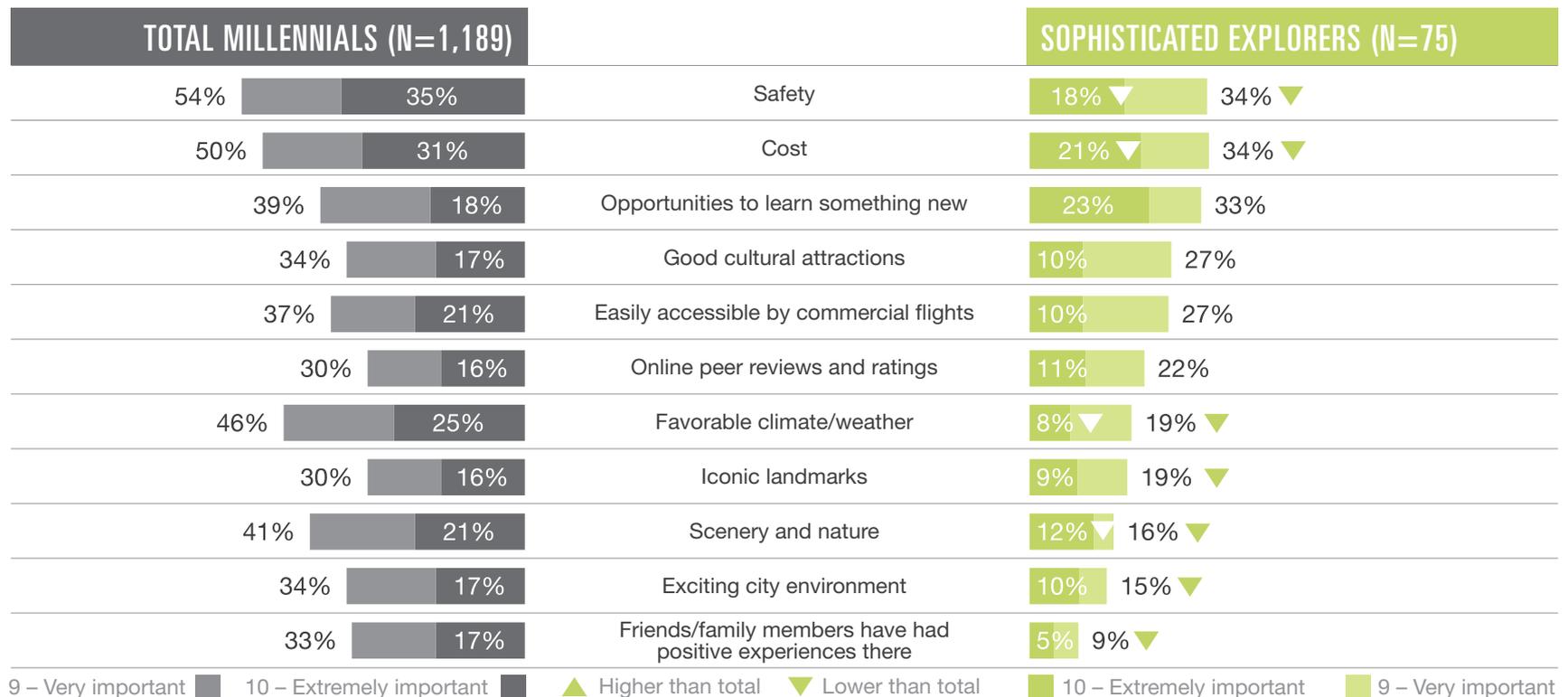
Base: Millennial travelers

A6. What types of vacations will you take in the next 12 – 24 months?



MOST KEY DECISION FACTORS WHEN DECIDING ON A VACATION DESTINATION ARE LESS IMPORTANT TO SOPHISTICATED EXPLORERS.

KEY DECISION FACTORS WHEN DECIDING ON A VACATION DESTINATION



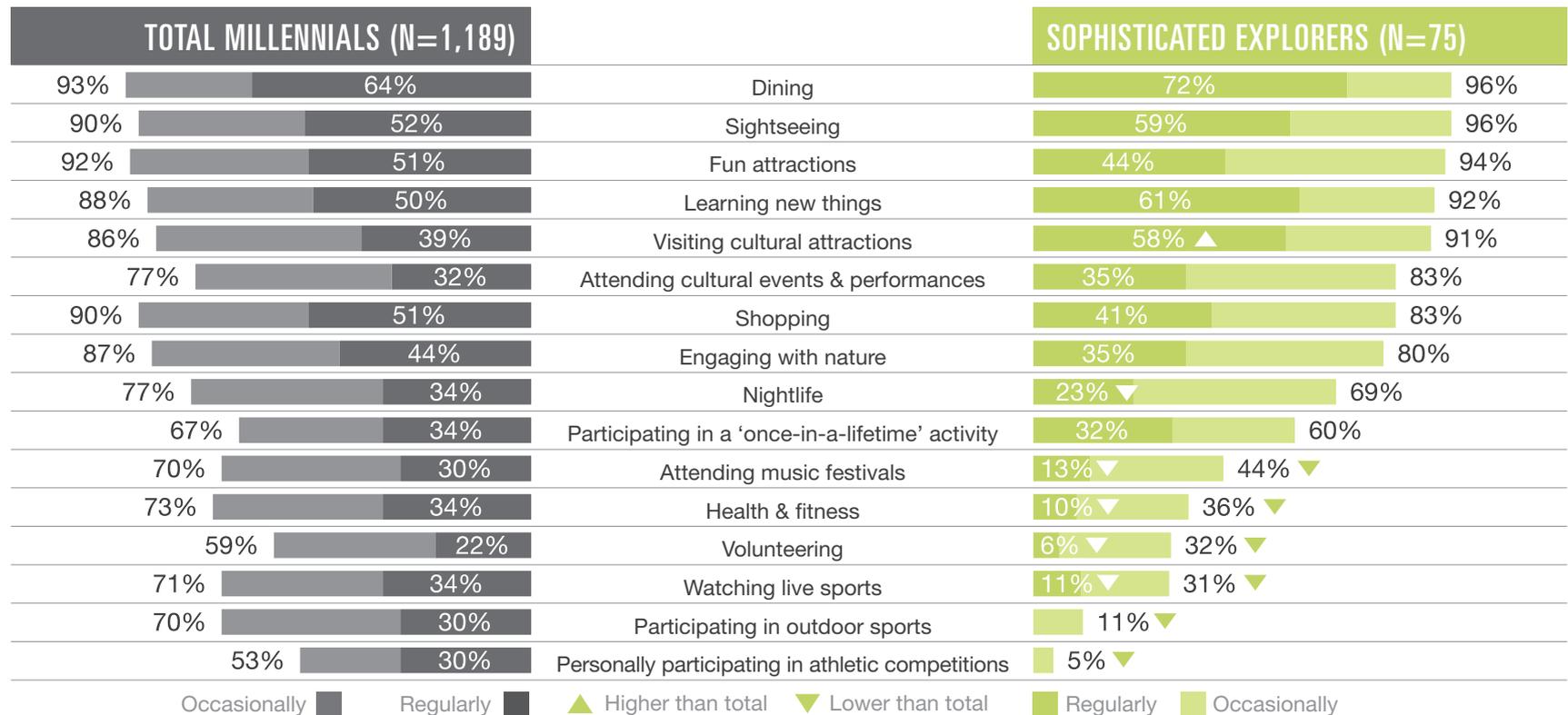
Base: Millennial travelers

A7. On a scale of 1-10, what are the most important factors you take into account when deciding on a vacation destination, 1 being not important at all & 10 being extremely important?



SOPHISTICATED EXPLORERS ARE MORE LIKELY TO VISIT CULTURAL ATTRACTIONS, BUT LESS LIKELY TO ENJOY MOST OF THE LESS POPULAR ACTIVITIES SUCH AS ATTENDING MUSIC FESTIVALS, ALL HEALTH AND FITNESS/ATHLETIC ACTIVITIES AND VOLUNTEERING.

ACTIVITIES ON VACATION



Base: Millennial travelers

A8. While on vacation what activities do you enjoy regularly, enjoy occasionally, would like to try, or do not enjoy?

SEGMENT 2:
ALL-IN
ENTHUSIASTS

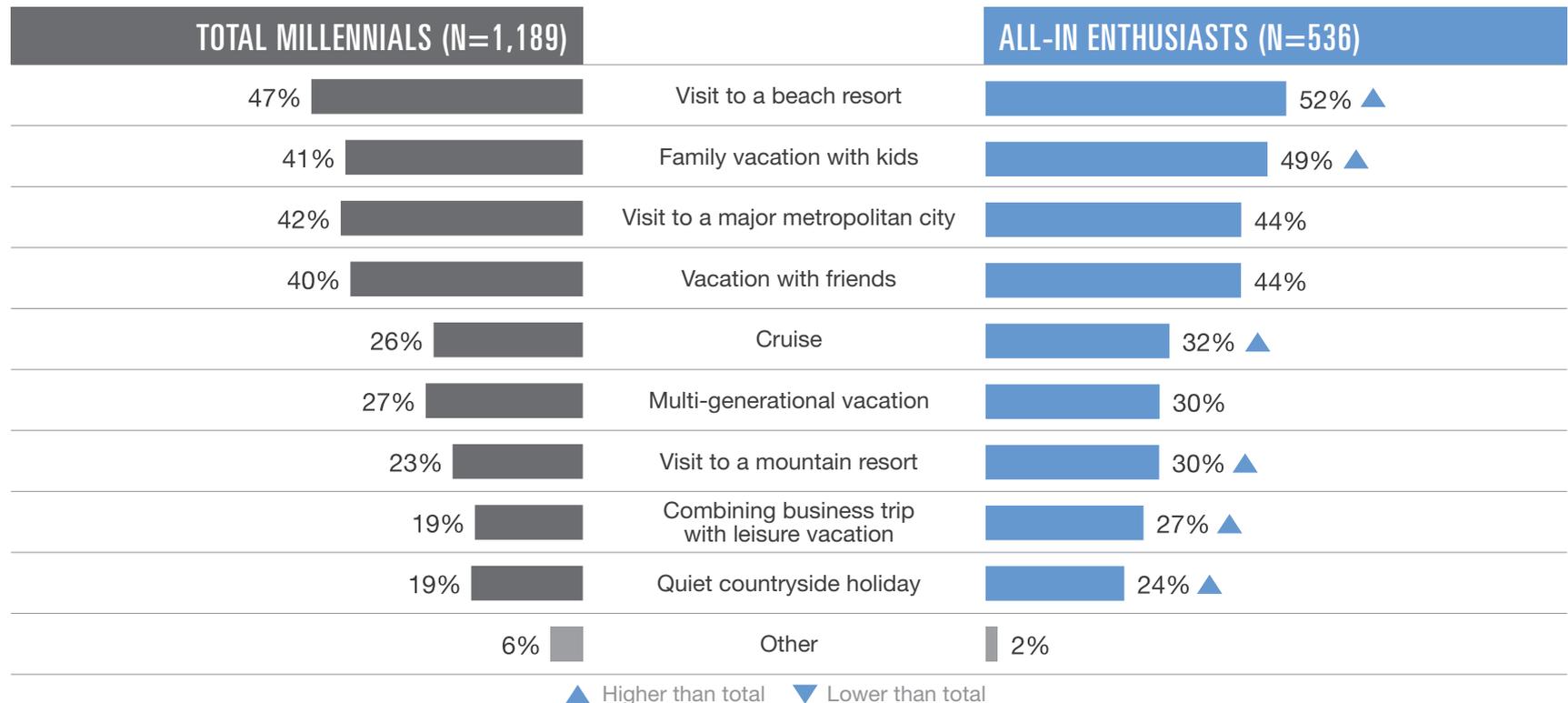




ALL-IN ENTHUSIASTS ARE MORE LIKELY TO TAKE MOST KINDS OF VACATIONS IN THE NEXT 2 YEARS, WITH GREATEST INTEREST IN VISITING A BEACH RESORT AND FAMILY VACATION WITH KIDS.



TYPES OF FUTURE VACATIONS



Base: Millennial travelers

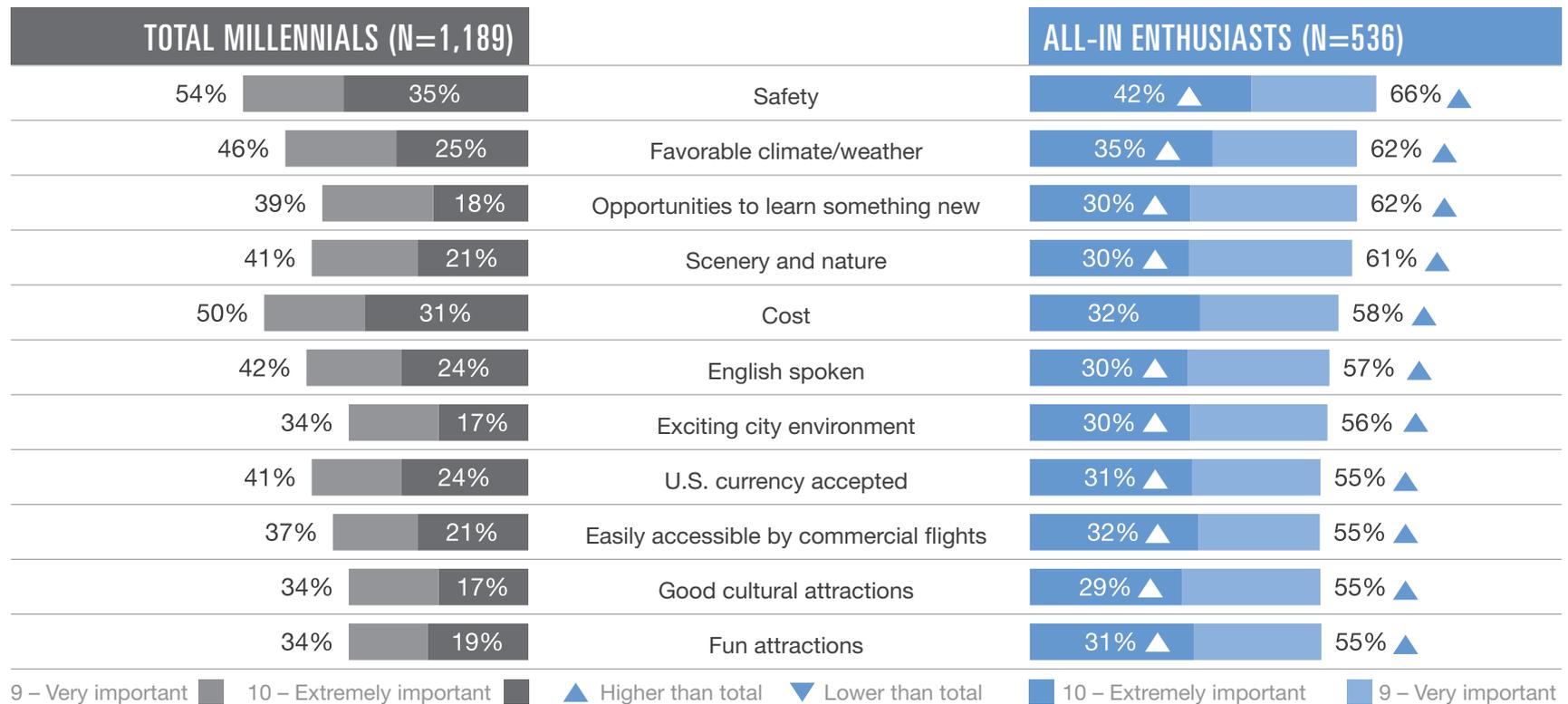
A6. What types of vacations will you take in the next 12 – 24 months?



ALL DECISION FACTORS ARE MORE IMPORTANT TO ALL-IN ENTHUSIASTS WHEN DECIDING ON A VACATION DESTINATION.



KEY DECISION FACTORS WHEN DECIDING ON A VACATION DESTINATION



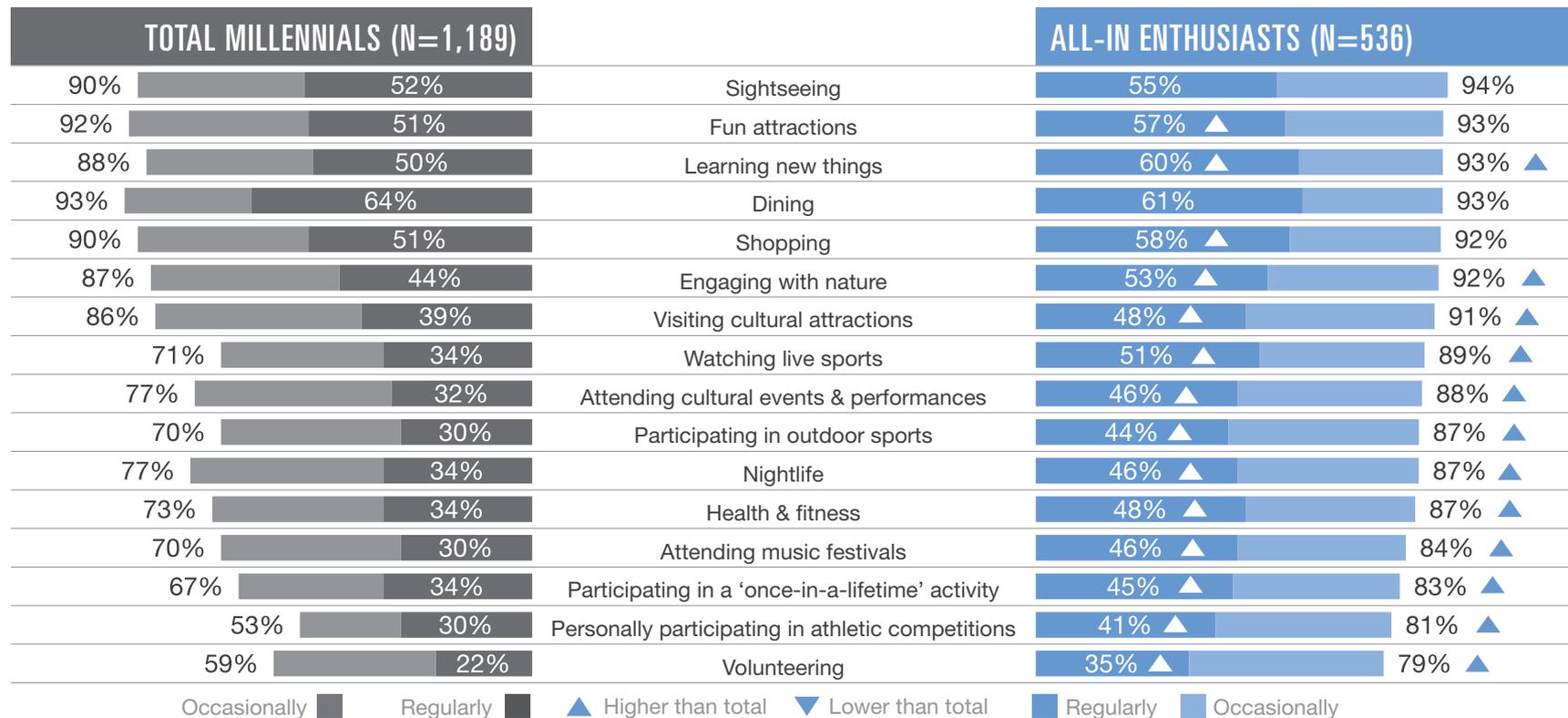
Base: Millennial travelers

A7. On a scale of 1-10, what are the most important factors you take into account when deciding on a vacation destination, 1 being not important at all & 10 being extremely important?



ALL-IN ENTHUSIASTS ARE 'ALL IN' FOR VACATION ACTIVITIES AND ARE MORE LIKELY TO ENJOY MOST OF THEM WHILE ON VACATION COMPARED TO ALL MILLENNIAL TRAVELERS.

ACTIVITIES ON VACATION



Base: Millennial travelers

A8. While on vacation what activities do you enjoy regularly, enjoy occasionally, would like to try, or do not enjoy?

SEGMENT 3:
ACTIVE
ADVENTURERS

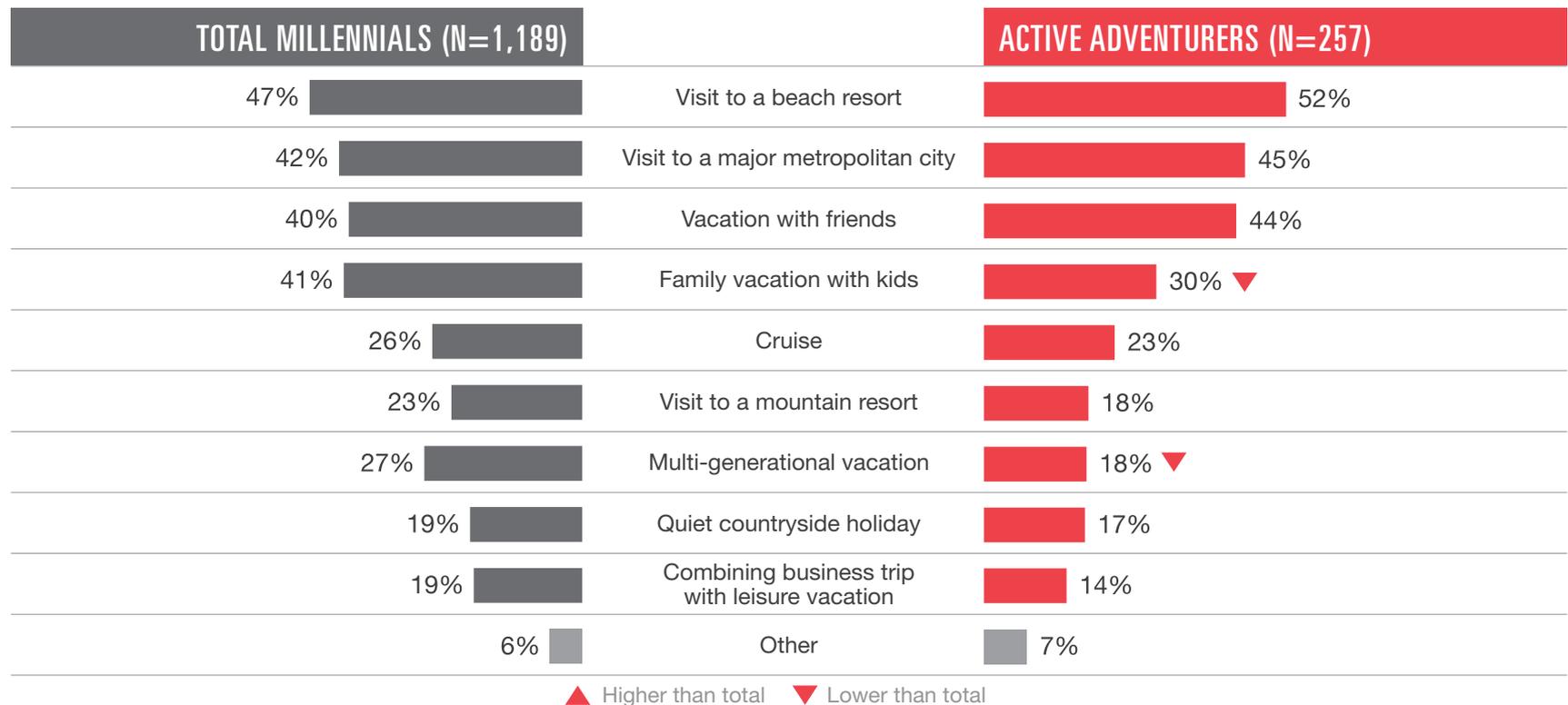




COMPARED TO ALL MILLENNIAL TRAVELERS, ACTIVE ADVENTURERS ARE LESS LIKELY TO GO ON A FAMILY VACATION WITH KIDS OR A MULTI-GENERATIONAL VACATION.



TYPES OF FUTURE VACATIONS



Base: Millennial travelers

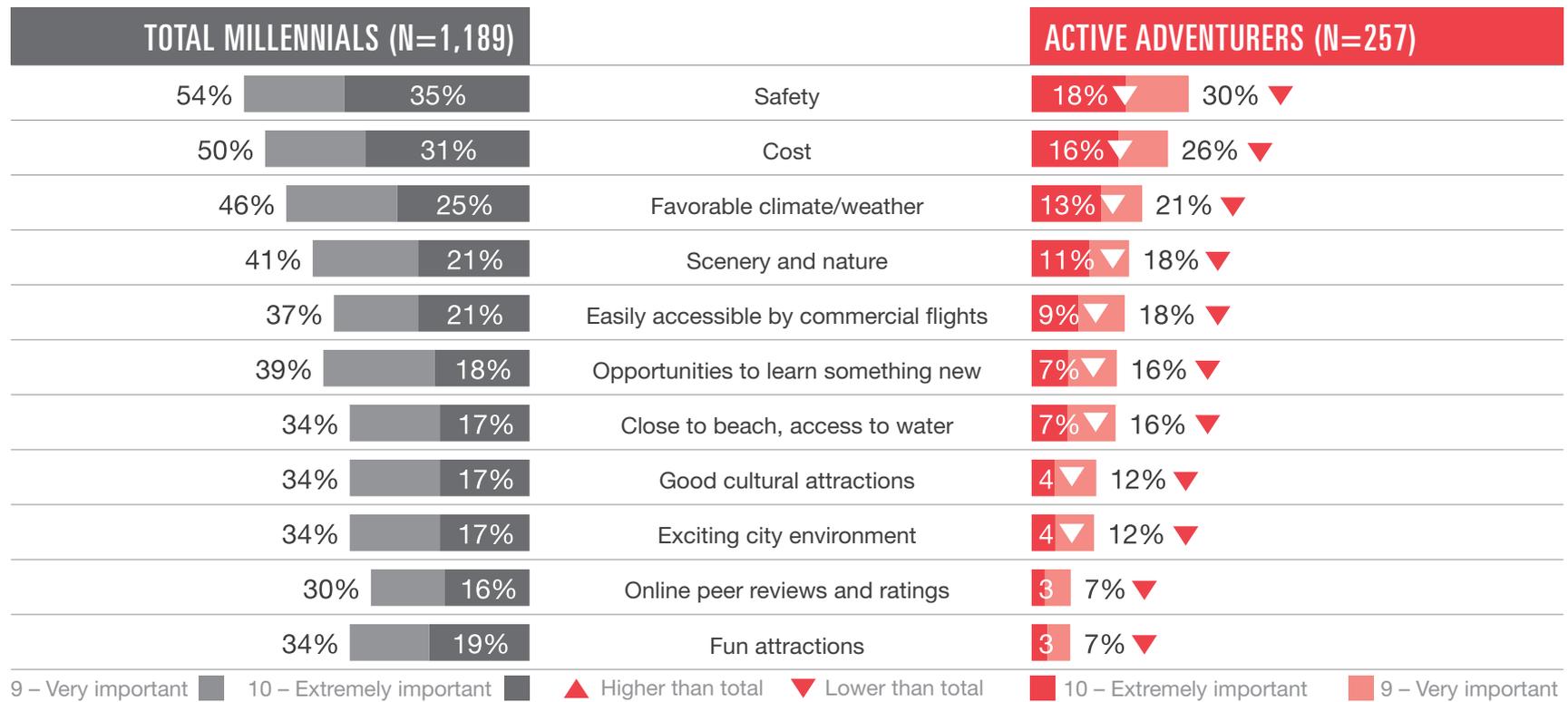
A6. What types of vacations will you take in the next 12 – 24 months?



ALL VACATION DECISION FACTORS ARE LESS IMPORTANT TO ACTIVE ADVENTURERS WHEN COMPARED TO ALL MILLENNIAL TRAVELERS.



KEY DECISION FACTORS WHEN DECIDING ON A VACATION DESTINATION



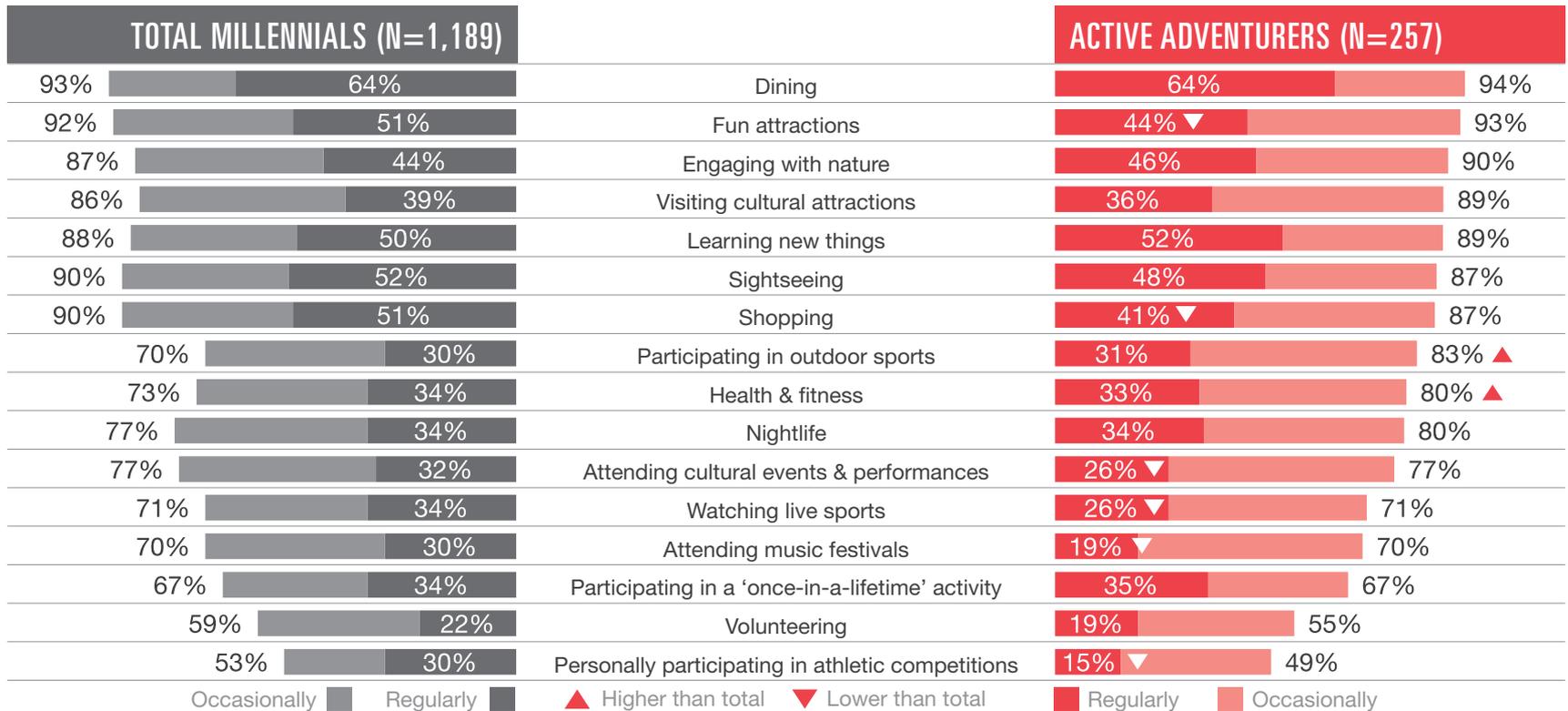
Base: Millennial travelers

A7. On a scale of 1-10, what are the most important factors you take into account when deciding on a vacation destination, 1 being not important at all and 10 being extremely important?



ACTIVE ADVENTURERS LIKE TO STAY ACTIVE ON VACATIONS, AND ARE MORE LIKELY TO PARTICIPATE IN OUTDOOR SPORTS OR HEALTH AND FITNESS ACTIVITIES.

ACTIVITIES ON VACATION



Base: Millennial travelers

A8. While on vacation what activities do you enjoy regularly, enjoy occasionally, would like to try, or do not enjoy?

SEGMENT 4:
OCCASIONAL
CONVENIENCE
TRAVELERS

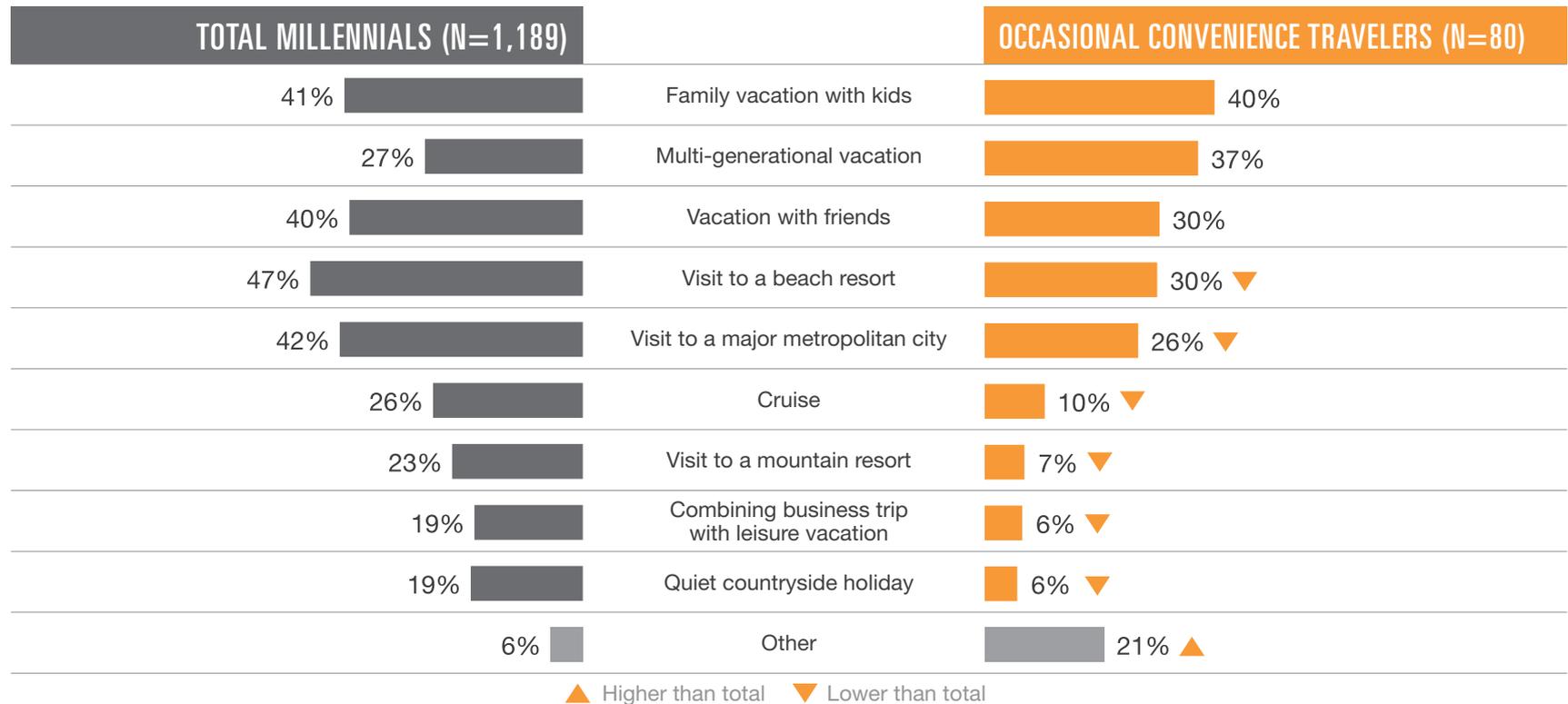




OCCASIONAL CONVENIENCE TRAVELERS ARE LESS LIKELY TO PLAN ON TAKING MOST TYPES OF VACATIONS IN THE NEXT 2 YEARS.



TYPES OF FUTURE VACATIONS



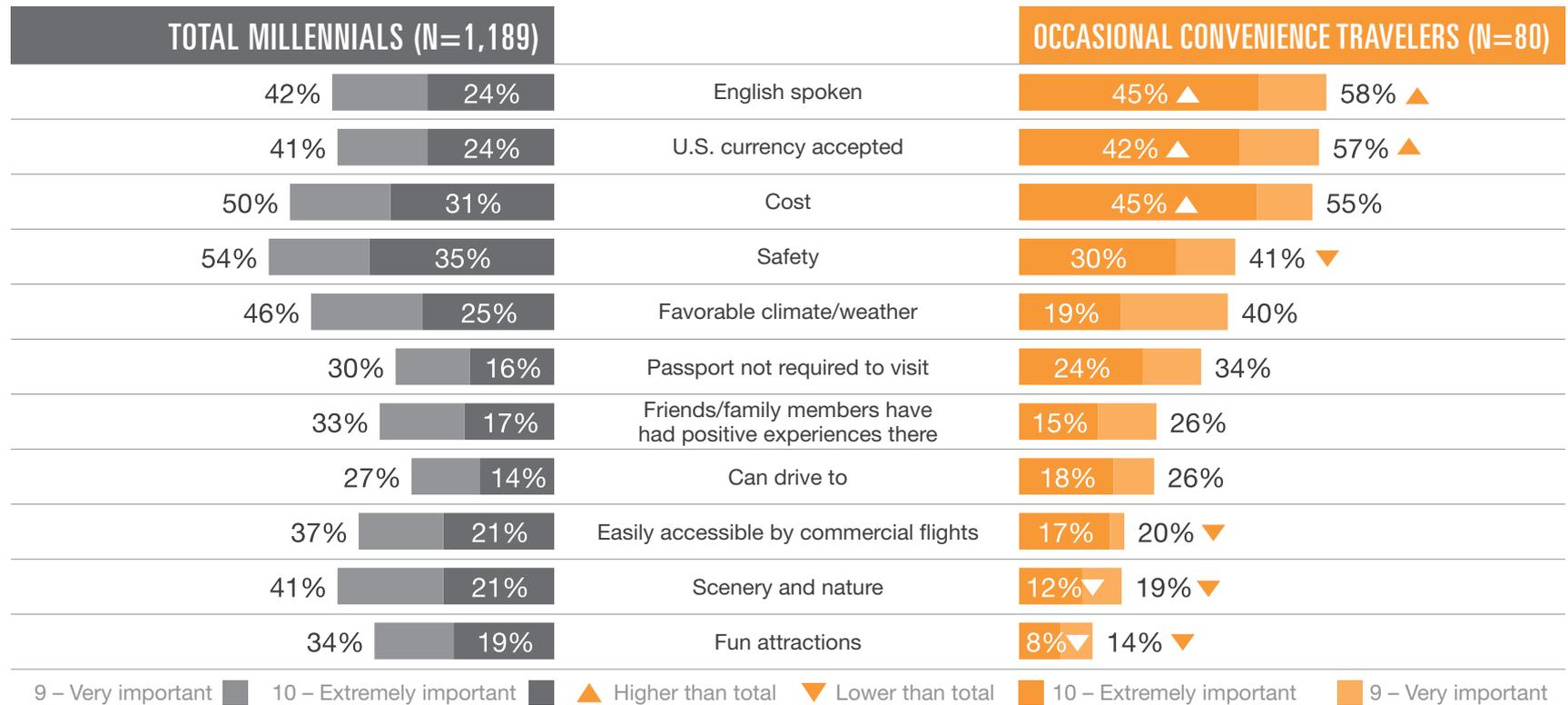
Base: Millennial travelers

A6. What types of vacations will you take in the next 12 – 24 months?



ENGLISH SPOKEN, U.S. CURRENCY ACCEPTED AND COST ARE THE MOST IMPORTANT VACATION FACTORS FOR OCCASIONAL CONVENIENCE TRAVELERS.

KEY DECISION FACTORS WHEN DECIDING ON A VACATION DESTINATION



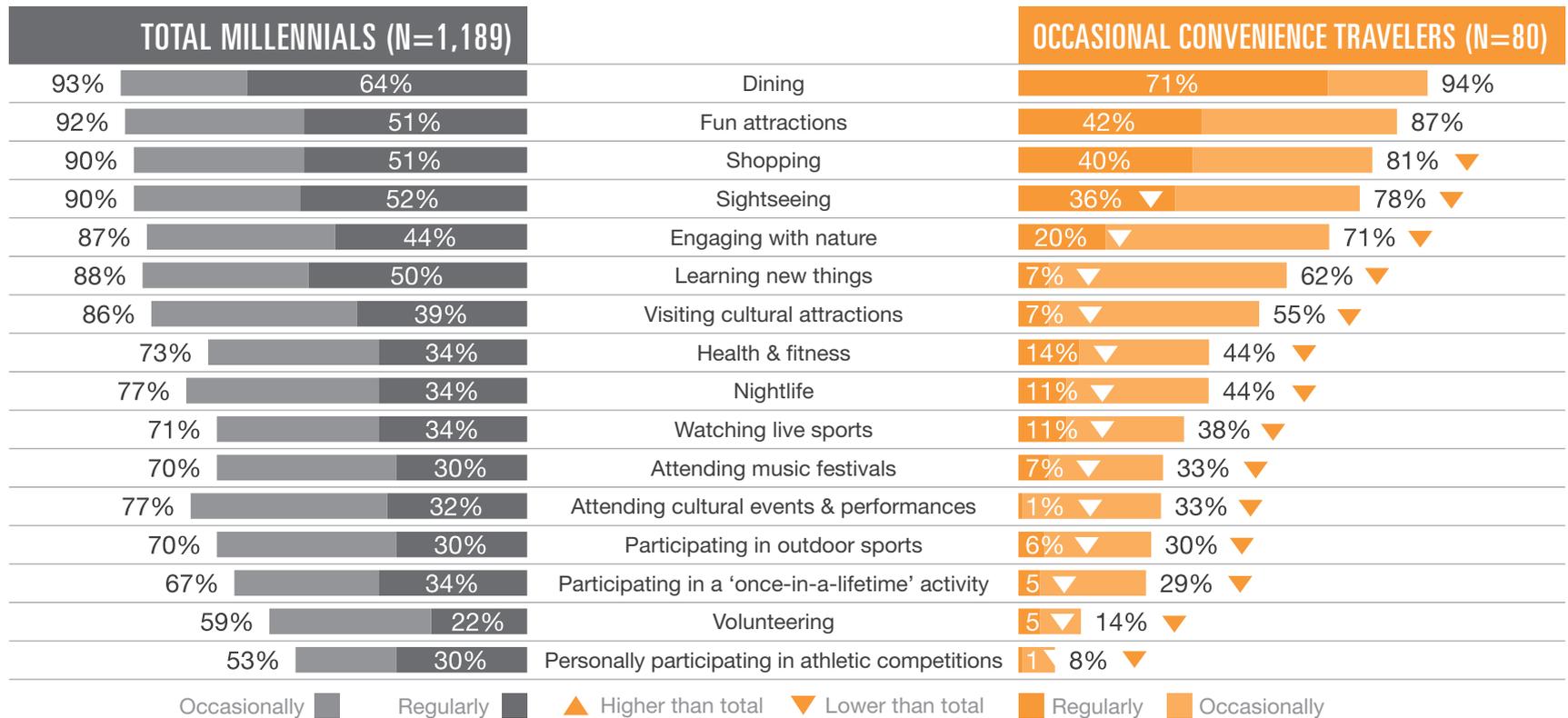
Base: Millennial travelers

A7. On a scale of 1-10, what are the most important factors you take into account when deciding on a vacation destination, with 1 being not important at all and 10 being extremely important?



OCCASIONAL CONVENIENCE TRAVELERS ARE LESS LIKELY TO PARTICIPATE IN MOST VACATION ACTIVITIES, WITH THE EXCEPTION OF DINING AND FUN ATTRACTIONS.

ACTIVITIES ON VACATION



Base: Millennial travelers

A8. While on vacation what activities do you enjoy regularly, enjoy occasionally, would like to try, or do not enjoy?

SEGMENT 5:
FAMILY-
ORIENTED
FRUGALS

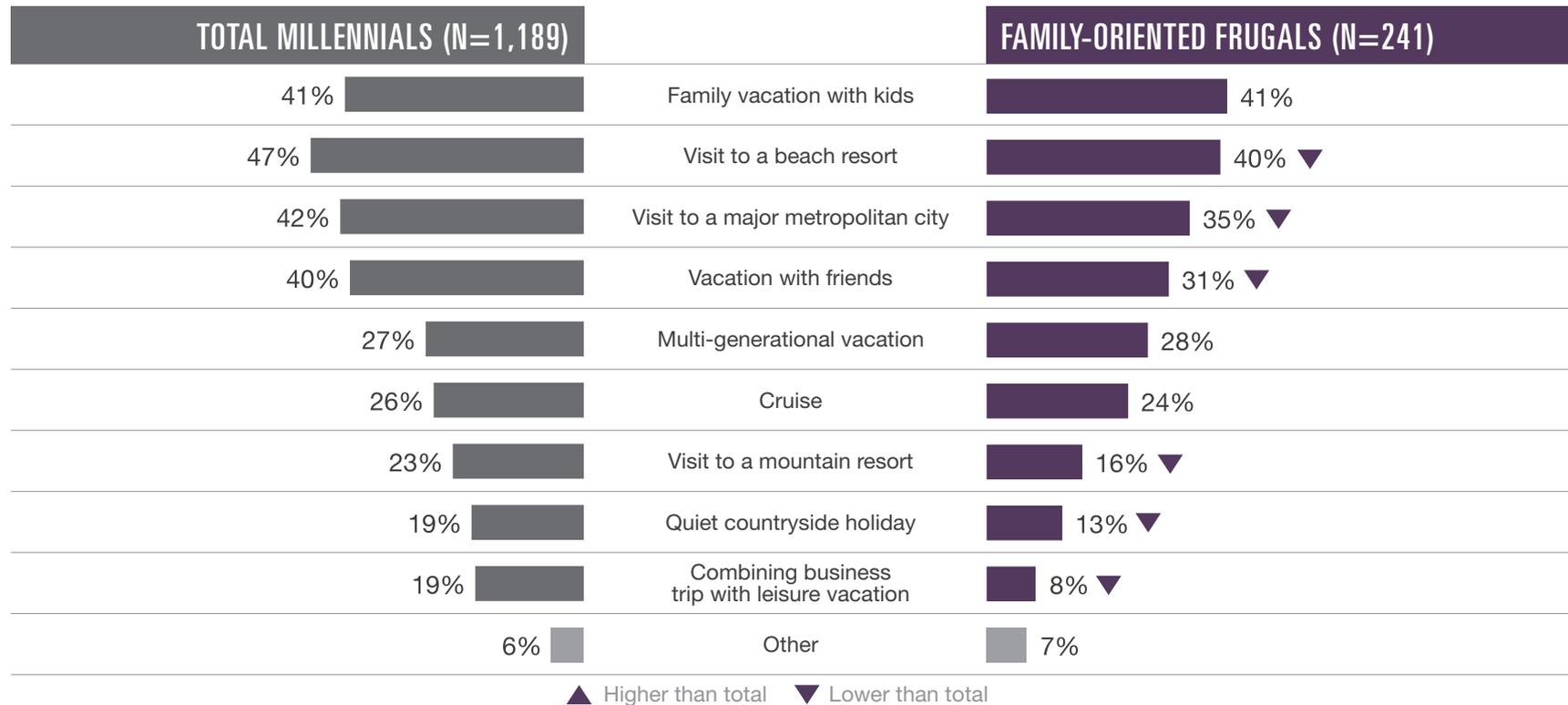




ALTHOUGH NOT HIGHER THAN TOTAL MILLENNIAL TRAVELERS, FAMILY-ORIENTED FRUGALS SHOW GREATER INTEREST IN FAMILY VACATIONS WITH KIDS AND MULTI-GENERATIONAL VACATIONS COMPARED TO MOST OF THE OTHER SEGMENTS.



TYPES OF FUTURE VACATIONS



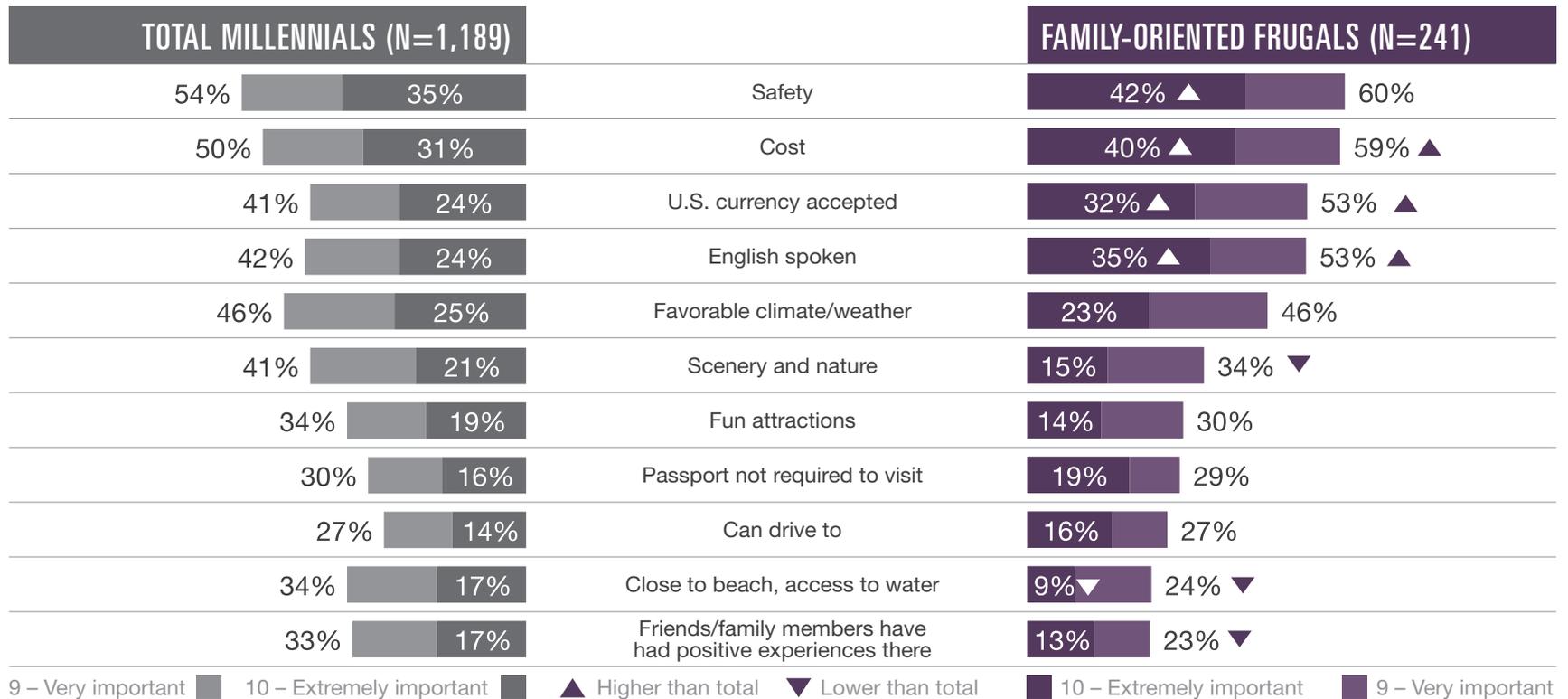
Base: Millennial travelers

A6. What types of vacations will you take in the next 12 – 24 months?



FAMILY-ORIENTED FRUGALS PLACE A HIGHER IMPORTANCE ON SAFETY, COST, U.S. CURRENCY AND ENGLISH BEING SPOKEN THAN ALL MILLENNIAL TRAVELERS.

KEY DECISION FACTORS WHEN DECIDING ON A VACATION DESTINATION



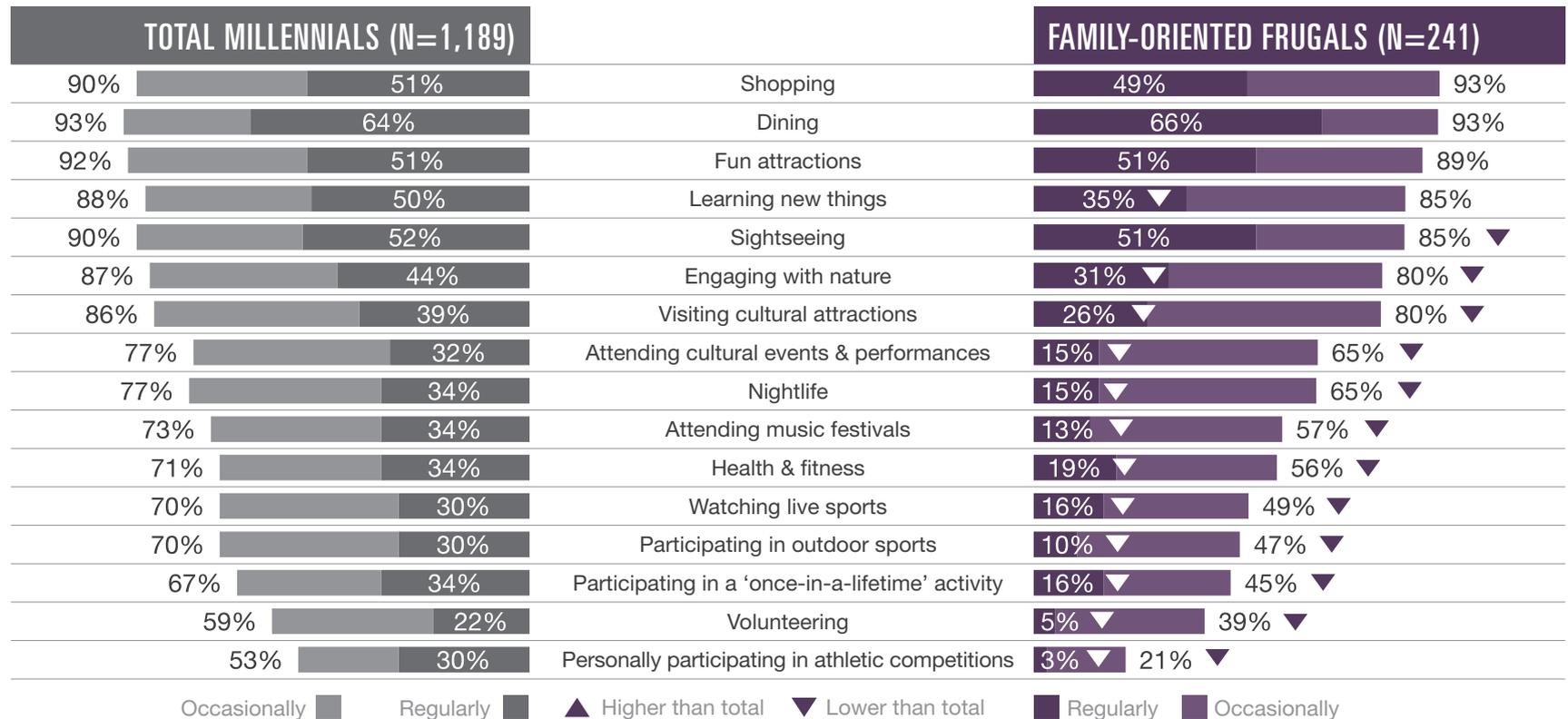
Base: Millennial travelers

A7. On a scale of 1-10, what are the most important factors you take into account when deciding on a vacation destination, with 1 being not important at all and 10 being extremely important?



FAMILY-ORIENTED FRUGALS ARE LESS LIKELY TO PARTICIPATE IN MOST ACTIVITIES WHILE ON VACATION.

ACTIVITIES ON VACATION



Base: Millennial travelers

A8. While on vacation what activities do you enjoy regularly, enjoy occasionally, would like to try, or do not enjoy?

THANK YOU!

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