FUTURE OF U.S. MILLENNIAL TRAVEL

A survey of America’s fastest growing tourism demographic

CITIES ARE THE DESTINATIONS
P. 11

MILLENNIALS HAVE KIDS NOW
P. 23

THE HOTEL INDUSTRY VS. AIRBNB
P. 29

THE FUTURE OF VACATION HOMES
P. 61
HI. WE’RE RESONANCE.

As leading advisors in real estate, tourism and economic development for three decades, Resonance Consultancy combines business strategy and marketing creativity to shape the future of destinations and developments around the world.

Our services span development strategy, place branding, place marketing and placemaking. To date, our team has completed more than 100 visioning, strategy, planning and branding projects for destinations and developers in more than 70 countries.

To learn more about us and our services, please visit ResonanceCo.com.
Thank you for your interest in Resonance Consultancy’s 2018 Future of U.S. Millennial Travel Report. As strategic advisors to dozens of destinations, cities and real estate developments around the globe, Resonance creates these reports—and weekly emailed insight briefings—to help our clients and the industries we work with plan more effectively for the future.

This is our second deep dive into the travel and tourism behavior of U.S. Millennial travelers. The first report, released in 2015, was a timely, exclusive piece of research that was immediately embraced by destinations and communities as a guide for harnessing a swelling, still-perplexing wave of consumers who are—in less than a decade—completely shredding the consumer funnel and transforming how we all attract new business and maintain brand loyalty.

Travel, tourism and hospitality are perhaps the thin edge of the wedge in this disruption. This latest iteration of our U.S. Millennial research certainly indicates as much. This is a U.S.—and global—demographic that increasingly prioritizes experiences over stuff. And what is more experiential than travel, tourism and vacation home ownership.

We are confident that this latest insight will help you future-proof your business and identify potential new opportunities. I also invite you to talk to us about how Resonance Consultancy can help your destination, city or real estate development with your strategic planning, branding or marketing. You’ll find a list of our services at the back of this report.

I look forward to your thoughts and questions.

Chris Fair, President and CEO
Resonance Consultancy Ltd.
cfair@resonanceco.com
646.413.8887
MILLENNIAL TRAVEL TRENDS REFLECT THE WAY MOST PEOPLE WILL EVENTUALLY TRAVEL
# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>7</td>
</tr>
<tr>
<td>1 // Cities Are the Destinations</td>
<td>11</td>
</tr>
<tr>
<td>2 // Go Solo, 'Cuz Yolo</td>
<td>17</td>
</tr>
<tr>
<td>3 // Not Kidding Around</td>
<td>23</td>
</tr>
<tr>
<td>4 // The Millennial Hotel (or Whatever it Is)</td>
<td>29</td>
</tr>
<tr>
<td>5 // The Well Millennial</td>
<td>37</td>
</tr>
<tr>
<td>6 // Camping Is Back</td>
<td>43</td>
</tr>
<tr>
<td>7 // The State of Tech on the Road</td>
<td>49</td>
</tr>
<tr>
<td>8 // We Need to Talk about Airbnb</td>
<td>55</td>
</tr>
<tr>
<td>9 // The Future of Vacation Homes (Is Bright)</td>
<td>61</td>
</tr>
<tr>
<td>Conclusion</td>
<td>67</td>
</tr>
</tbody>
</table>
INTRODUCTION

Millennials—young adults born between 1980-ish and the mid-'90s—are going away. In fact, the global obsession with Millennials (U.S. Millennials in particular) only continues to intensify. Conferences, study after study and media brands of questionable utility have been flooding the marketplace, dangling insights and promising that, with the right Instagram aesthetic and transparent business model, your business can be the next Warby Parker.

The Millennial generation is often shorthand, of course, for overall consumer behavior disruption. They just happen to adopt early and often—the canaries, if you will, in a coal mine where brand allegiance is dropping and the product that’s most convenient can ascend to market domination (and profitability) in record time.

But there’s no denying that Millennial consumers—a generation of especially empowered, fearless, efficiency-seeking Americans—have been brought up in a culture that will never resemble that of their parents... or even their older siblings.

As the Millennial consumer decides which meaningful, value-driven, braggable businesses deserve their increasingly hard-earned money, the rubber hits the road for companies that have been paying attention for the past decade.

And in few sectors have Millennials had more of a consumer behavior impact than in travel and tourism. In fact, travel marketing consultants MMGY Global estimate that 10% of U.S. Millennials plan to travel more in the future than they currently are—the only demographic on the rise.

This is why we created this report for destination marketers, tourism professionals, hotel developers and everyone else responsible for making a place irresistible for future travelers and residents.

This Future of U.S. Millennial Travel Report is our second in three years—a follow-up to our coveted inaugural briefing that spurred thousands of inquiries and spawned dozens of speaking engagements around the globe for our senior executive team.

Our 2018 report focuses on Millennial travelers we define as U.S. residents between the ages of 20 and 36 who’ve taken an overnight vacation at least 75 miles from home in the past 12 months. For more details, see “Methodology” on page 9.
As with our inaugural 2015 report, the key objectives of the 2018 *Future of U.S. Millennial Travel Report* were as diverse as the group we were analyzing. First, we wanted to uncover trends in travel behavior and preferences of U.S. Millennial travelers in particular. We also wanted to determine the most important factors for U.S. Millennials when evaluating a destination and travel opportunity. Last, we wanted to explore the group’s travel funnel—the preferred path to purchase and the products and accommodations patronized on the ground.

Our insights from this report have surpassed our inaugural study in many ways.

Technology continues to proliferate, and Millennials are increasingly traveling as families with children whose generation doesn’t yet (but soon will) have its own marketer-concocted moniker.

Also, despite the global upheaval, thickening borders and reported security risks abroad for Americans in particular, U.S. Millennials are going global. In the next 24 months, they told us, a third of them are likely to visit a foreign country.

Among a massive and increasingly wealthy consumer group, that resiliency, empowerment and visceral need to discover a changing world before it’s gone forever will continue to reshape travel and tourism over the next half decade and beyond. Given that tourism is the fastest growing sector in both the developed world and developing markets, the insight revealed within this report is a blueprint for future-proofing your destination, hotel or resort.

To make that insight as accessible and memorable as possible, we’ve combined impactful visual information with editorial analysis over nine chapters, each deep-diving into a major undercurrent identified by our U.S. Millennial respondents.

On the pages that follow, you’ll discover stories about the hotels battling Airbnb on their own turf, the evolution of vacation homes, and about traveling solo because YOLO.

Turn the page and get going. The consumers of the future have already arrived. And they wonder why you’re keeping them waiting.
Our 2018 study focuses on Millennial travelers we define as U.S. residents between the ages of 20 to 36 who’ve taken an overnight vacation at least 75 miles from home in the past 12 months.

METHODOLOGY

Insights West conducted an online survey of 1,548 U.S. Millennial travelers from March 17 – 24, 2017. An overall sample of this size is considered accurate within +/-2.5% 19 times out of 20. All respondents were screened to meet the following criteria:

- 20 – 36 years of age as of March 16, 2017
- Annual household income of $35,000 or higher
- Have taken an overnight vacation at least 75 miles from home in the past 12 months

The data was weighted by gender, age, region and incidence of travel according to U.S. Census data.
SAVORING THE FLAVORS OF SINGAPORE'S CHINATOWN
One of the most impactful yet underreported tourism metrics in the past five years has been the meteoric rise of the world’s cities as primary destinations for vacations. According to World Travel Monitor, city trips soared by 82% between 2007 and 2014 to reach 22% of all global holidays.

Think about that for a moment: the fastest growing demand for the fastest growing global sector is traveling to experience urbanity—density of people, cultural distinction and how it all fits together.

According to the vacation preferences revealed by our study, Millennial travelers are almost as likely to visit a major metropolitan city (38%) as they are to visit a beach resort (40%) in the next 24 months. The appeal of city travel among Millennials increases with affluence, with respondents whose household earnings exceed $100,000 the most likely to visit a major city as a destination (40%).

The fact that beach vacations—that synonym for “getting away from it all” for decades among tourism and travel consumers—are essentially neck and neck with urban centers is a sea change the likes of which the industry has never experienced. And, given that it’s being driven by consumers whose preferences will only grow as their spending power does, cities may very well become the most popular type of vacation destination in the next decade.

As remarkable as the rise of the city may seem, our research shows it’s not all that surprising. The city experience is shorthand for a U.S. Millennial wish list of travel experiences and expectations.

As much as U.S. Millennials—both in our research and elsewhere—have identified that venturing out of their comfort zone and “learning new things” (85% of our respondents) are important while on vacation, the globally connected city increasingly feels like home, making it an appealing type of vacation. Uber operates in more than 80 countries and nearly 700 cities.
Airbnb provides vetted places to crash, bookable with your thumb while waiting for an Americano in your local coffee shop. The seamless convenience certainly is addictive to younger travelers.

According to Airbnb data, bookings by guests totalled 80 million last year. In 2017, the company is on track to surpass 100 million guest bookings. This isn’t nights stayed; it’s how many bookings were made through the service. Bookings for business trips have tripled in 2016. The company now boasts four million listings, according to company data—double last year’s reported total of 2 million—in 191 countries and a dizzying 65,000 cities. If you’re going, chances are there’s a room—or an entire home—for you at less than half the price of a hotel room. Take a few friends or family (as our respondents are wont to do) and the cost per person drops further still.

Cities, of course, are densely populated places. Being lost in a crowd—that anonymity—is much easier in the urban jungle. Travelers, though, expect safety. As crime rates drop in a city’s most visited places (New York now boasts its lowest per-capita violent crime since record-keeping began), it’s heartening.

Walkability and a zealous pursuit of human-scaled pedestrianism have also made cities safer to explore. Even sprawling, seemingly oblivious cities like Las Vegas are becoming downright European. Recently, its version of the Autobahn—Flamingo Road—received an ambitious overhaul that included new bus stops, better crosswalks and more traffic signals. In the past two years, officials have spent millions to improve pedestrian safety.

The second key factor affecting vacation decisions is cost. Our respondents demand value from their frequent traveling.

The U.S. Federal Reserve’s most recent Survey of Consumer Finances found that the average net worth of U.S. Millennials 20 to 30 years old was between $2,093 and negative $38,915. What things cost matters
Types of Future Vacations

- 44% Family vacation with kids
- 40% Visit a beach resort
- 40% Vacation with friends
- 38% Visit a major metropolitan city
- 34% Camping
- 30% Visit a foreign country
- 25% Multi-generational vacation
- 25% Vacation on my own
- 25% Cruise
- 21% Visit a mountain resort
- 15% Combining business trip with leisure
- 15% Quiet countryside holiday

Base: All respondents (1,548)
A3. What types of vacations will you take in the next 12 – 24 months?

To U.S. Millennials we surveyed. Almost, in fact, as much as safety: 57% for Safety versus 52% for Cost when deciding on a vacation destination.

With more competition among service providers—from Airbnb listings to airlines (to say nothing of the ability to travel by public transit or by foot)—basing yourself in a dense urban setting is increasingly more cost-effective.

One destination that has leveraged cost-conscious access to a seemingly remote part of the planet is Iceland.

Left out of the European circuit for decades, the tiny volcanic island nation has been aggressively promoting its lack of stopover restrictions over the past few years, essentially positioning Reykjavik—and the entire nation of Iceland—as a free bonus destination to anyone flying between North America and Europe.

Their simple proposition adds up to an irresistible offer for the cost-conscious Millennial:

“On your next journey across the Atlantic, take advantage of the option to stop in our beautiful home for up to seven nights at no additional airfare,” coos Icelandair marketing.

To make the service even more irresistible, Icelandair launched the free Stopover Buddy Service in late 2016. Icelandair travelers had the chance to see the country through the experienced eyes of a local with similar interests. The hang time lasted as long as an entire day.

Is it any surprise, then, that Contiki—that gateway brand of globally curious youth—has crowned “Bathing in the Blue Lagoon in Iceland” as the #1 activity for 18-to 25-year-olds in 2017? It’s true: 5,000 respondents in the company’s “No Regrets List” chose Iceland over the Great Pyramids of Giza and walking the Great Wall of China.

Other media have also spent the past 18 months raving about Iceland’s moonscape, its accessibility and its predominantly female government. It’s a dramatic
As remarkable as the rise of the city may seem, our research shows it’s not all that surprising. The city experience is shorthand for a U.S. Millennial wish list of travel experiences and expectations.

As remarkable as the rise of the nation that teetered on the brink of economic collapse six years ago and is almost always on notice about imminent volcanic eruption.

Portland, Oregon, is a destination that’s been a powerful draw for young travelers over the past decade. A fair share end up staying after falling for the woodsy, left-leaning Pacific Northwest city. But the city’s value, both in low-cost attractions and culinary scene is just as magnetic. The city’s new campaign, “You Can, In Portland,” is firmly rooted in accessibility and mobility.

The city has always been lauded for its car-free freedom. Its transit infrastructure just keeps building. The new Eastside Extension of the Portland Streetcar costs $1 for two hours of travel and accesses the kinetic Central Eastside Industrial District, packed with independent bars and flea markets. Jeff Miller, CEO of Travel Portland, tells Resonance that the city’s tourism leaders are facilitating independent exploration. “We have one of the largest forested parks in the country. We have Mount Hood that’s 90 minutes away. Our priority is to empower affordable, easy exploration of the region.” Miller says that Portland lacks the condensed tourist districts of other cities, which means that discoverability of neighborhoods is a priority.

According to respondents in our survey, “Ease of getting around using public transportation” is a key factor when choosing a vacation destination, with more than a third of respondents citing it as important.

In a more overt appeal to the globally curious but frugal Millennial traveler, The Jerusalem Development Authority announced a package of city discounts for travelers “in their twenties and thirties… to experience some of Jerusalem’s top attractions.” It offers a wide range of reductions on hotels and transport, historical tourist sites, festivals and events, restaurants and bars. Launched in July 2017, it’s too early to measure the campaign’s efficacy, but it’s a bold, coordinated attempt to make one of the planet’s most historic cities accessible for under 40 euros a day.
A distant third key factor affecting vacation decisions is whether English is spoken in a destination. Here, a major city has an advantage: chances are that speaking English only will not be a barrier to fully experiencing the destination and easily accessing most services and amenities. Rapidly expanding services like Lyft, Uber and Airbnb—available in English in cities all over the planet—cater to the Millennial travel preference for dealing in their native tongue while on the road.

That preference may have played into the hands of New York City, recently named “Best City in the World for Millennials,” according to a July 2017 study by Ipsos-Mori. The pollster interviewed 18,557 people aged 16 to 64 from 26 countries about their favorite city from a list of 60. For respondents born between 1980 and 1995, the Big Apple won out over Abu Dhabi and Paris.

The fact that New York is, among many things, the planet’s culinary capital may further explain its appeal to Millennial travelers. In our survey, more than nine out of 10 respondents cite Dining as the most enjoyable activity while on vacation, ahead of Attractions, Sightseeing and Learning New Things. The quality and number of restaurants predominate for more than a third of all respondents considering a vacation. Restaurant quality and bounty rises as the predominant factor (41%) for Millennials earning $100,000 or more.

Small wonder, then, that New York draws the young and hungry. It boasts 77 restaurants with at least one Michelin star. The difference between culinary lineage of old and today? Starred restaurants are tucked relatively off the map, in Bushwick (Faro), Harlem (Sushi Inoue) and Williamsburg (Aska). That discoverability of an epic, bragging pot of culinary gold at the end of a long stroll or subway ride “away from the crowds” is the secret sauce sought by many of our respondents who, had we asked, would likely have given NYC the same high marks as their fellow global travelers in the Ipsos poll.
Travel may have been viewed as a luxury by previous generations, but Millennials see it more as a necessity. According to our 2018 *Future of U.S. Millennial Travel* research, a third of U.S. Millennial travelers say they are likely to visit a foreign country in the next 24 months. And this generation of connected travelers doesn’t shy away from the idea of going it alone; in fact, 25% of those polled in our study said they like it that way.

A quick look at recent Google search trends reveals that the number of searches for the terms “solo travel” and “travel alone” hit a peak in the first week of January 2017—almost 25% higher than the same week the previous year, and the highest ever. In 2017 alone, dozens of major glossy magazines and lifestyle websites published stories about solo traveling, many with tips on how to do it. “Thinking of Traveling Alone? It’s Safer (And Easier) Than You Think,” a story in *Vogue* declared. “Solo Travel: What To Know Before Traveling By Yourself,” “Solo Vacations: 12 Best Vacations to Take Alone” and “Solo Female Travel Is On The Rise—And It’s An Adventure” were just three of the stories recently published by *Condé Nast Traveler*. *National Geographic Traveler* offered its own take on the subject in “Six Things Solo Travel Teaches You.” The list goes on.

Traveling alone offers complete freedom. A solo traveler gets to choose where to go, what to see and when to see it. Scroll through Instagram and you’re likely to come across a photo of a lone Millennial taking in the view from a mountaintop. Or standing in a bamboo forest. Or taking a selfie in front of an iconic city landmark at the crack of dawn.

Traveling alone isn’t a recent trend, either. As far back as 2014, the accommodation site Booking.com unveiled its first *Solo Travel Report*. The research surveyed both Millennials and Gen-Xers in the U.S. and in international destinations including the United Kingdom, Canada, Australia and Germany. Its big revelation was that it’s not just young American dudes who set out on the road alone. In fact, compared to those from other countries examined in the report,
It’s clear that travel is a top priority for Millennials, but how are they doing it? How do they afford it? Simply, they’re willing to budget more for trips. They also spend most of their money on experiences rather than on material things.

American women rank first in solo travel and are most likely to take three trips or more in a given year.

Hotels are taking notice. In the past few years, more and more brands—Hamilton Crown Plaza in D.C., Ellis Hotel in Atlanta, Georgian Court Hotel in Vancouver, Four Seasons Hotel Riyadh and many others—have jumped on the bandwagon by offering Women Only floors, which provide an extra layer of security along with amenities like extra dress hangers, minibars stocked with smoothies, complimentary nylons and use of a flat iron.

“Women not only are traveling by themselves, but with other women friends, with their sisters or their daughters,” says Doni Belau, CEO and founder of Girls Guide to Paris. In an interview with Forbes, Belau cites travel industry experts as saying that women make 80% of travel decisions and spent approximately $125 billion in tourism in 2014. “They make most of the decisions related with leisure travel,” she says. “They decide on the places to visit, book tickets, reserve the hotels, make dinner reservations.” Paul Hennessy,
Increasingly, the smartphone is the new travel buddy

Marvin Meyer, CMO at Booking.com, agrees: “Our research suggests that female solo travel is a phenomenon that is here to stay.”

Women-only travel companies are also on the rise (up 230%), according to a study reported in Huffington Post. Those numbers are set to increase in the next few years as more and more women, particularly Millennial women, embark on trips where just a few more amenities and services would make a solo trip more comfortable and memorable. What do these offers look like for tourism brands? Usually some sort of enriching adventures—the kind that don’t fit the gender stereotypes. According to Virtuoso, the global network of luxury travel agencies, the #2 trend for 2017 is active and adventure travel. This includes experiences like “an African safari, swimming with whale sharks in Mexico or Australia, or hiking the Swiss Alps.”

Contiki is just one of many travel companies with a long-established laser-focus on the solo traveler aged 18 to 25. The company’s philosophy (preceded by a hashtag, of course) can best be summed up by Instagram-ready quotes like “just say yes” and “have no regrets.” Its approach to travel resonates with empowered, confident, curious Millennials, who are more likely to count their wealth in experiences and memories than by the balance of their bank accounts.

Millennials are exploring at sea, too. Just a few years ago, cruise lines penalized solo travelers with a single supplement fee. Today they’re pursuing them with staterooms and common areas specifically designed for the single cruiser, as well as amenities Millennials expect (fast WiFi) and might desire (like skydiving, zip-lining and other high-adrenaline shipboard adventures). This, of course, includes late-night dance parties.

Next year, one cruise company plans to launch the first Millennial-targeted cruise line called U by Uniworld. According to The New York Times, the high-end river cruise line is repurposing existing ships and refinishing them with black exteriors, sleek design with communal spaces, deck-top lounges and DJ sessions. On shore, travelers can explore independently or go on guided excursions like rock climbing, following so-called
Our research shows that the two most important factors for Solo Millennial travelers when choosing a vacation destination are Safety (56%) and Cost (51%), followed by Quality of Natural Environment/Scenery and English Spoken. Last year Topdeck Travel, which organizes group travel for those aged 18 to 30-something, surveyed 31,000 people under 40 from 134 different countries. They found that instead of Europe, more of those people had been to Australia and New Zealand—two countries known for their natural scenery and where English is the primary language.

Our study shows that those with higher incomes place greater importance on several factors compared to lower income earners. The most notable priorities for higher-income respondents are Quality and Variety of Shopping (41% vs. 19%), Close to Beach (44% vs. 21%) and Number of Fun Attractions (47% vs. 28%).

It’s clear that travel is a top priority for Millennials, but how are they doing it? How do they afford it? Simply, they’re willing to budget for trips—and going solo is one way to do that. They also spend most of their money on experiences rather than on material things. According to our research, Fun Attractions, Dining and Learning New Things (90%, 89% and 88% respectively) top the list of preferences for Solo Millennial travelers while on vacation, followed by Sightseeing (87%). Participating in a Once-in-a-Lifetime Activity and Volunteering are the most desired future activities.

If they have to go solo to get out there, so be it. Because #YOLO. After all, the entire trip will be, WiFi willing, shared with everyone anyway. Increasingly, companionship on the road is as rewarding virtually as it is physically.
Quick—what comes to mind when you think of a Millennial traveler? Probably something clichéd, like a young couch-surfer checking off places on her bucket list as she turns to the sun and smiles (thankful for the warmth but also for not having to use a filter on the photo she just took). Or maybe a 30-something tacking on a few extra vacation days to a business trip to subsidize some much-needed adventure.

What probably doesn’t come to mind is a young family of three or four visiting a faraway beach resort, exploring an Asian capital or checking into an all-inclusive hotel, strollers and pool toys weighing them down. But with a bulk of travelers aged 20 to 36 today entering the realm of parenthood and making quality family time a top priority, that’s exactly what’s happening. Our research shows that Millennials aren’t just traveling more than ever before; 44% of them are traveling with kids in tow, too.

About half of American Millennials already have children and some 1.3 million Millennial women gave birth for the first time in 2015, according to data from the National Center for Health Statistics. The total number of U.S. women in this generation who’ve become mothers is an astonishing 16 million; they accounted for about eight in 10 (82%) of U.S. births in 2015. According to our research, more than half (58%) of U.S. Millennial travelers have children under 18 years of age in the household and 57% have a household of three to four people.

Once kids enter the picture, Millennial parents continue to travel, and their appetite for exploring new places and immersing themselves in different cultures doesn’t abate. In fact, our research shows that in the next two years, close to half of Millennial travelers plan to take family vacations. Turns out that family travel is the most popular type of vacation among this demographic group. It makes sense for this generation of adventurers who seek authentic experiences and have a deep appreciation of other cultures to want to raise well-rounded children. For them, travel is one way to do that.
There are 80 million Millennials in the U.S. who collectively take an average of 2.6 trips per person each year and those with families travel much more than couples or singles, according to data presented at the TMS Family Travel Summit in 2016. So where are these Millennials with children traveling to? Our research shows that 41% of them are visiting beach resorts, followed closely (36%) by those choosing major metropolitan cities as primary destinations. Interestingly, Millennial families are not shying away from visiting foreign countries, either. In fact, that’s where a quarter of them choose to vacation. A report from the 2016 TMS Family Travel Summit concurs: “Millennials with children are traveling more internationally than any other demographic group and taking more than one vacation, often an adventure trip.”

Like their peers without kids, Millennial parents peruse their fair share (37%) of online peer reviews and ratings on sites like TripAdvisor and Yelp as well as social media postings (29%) by family members and friends to help them figure out where to travel. For them, safety is the #1 concern when choosing a vacation destination. Interestingly, they are jetting off to some pretty far-flung destinations. Google reported at the aforementioned TMS Family Travel Summit that the top five destinations for families are Osaka, Japan; Bangkok, Thailand; Kuala Lumpur, Malaysia; Bordeaux, France; and Athens, Greece. Considering that most of these Millennial parents have only recently had children, the most surprising revelation isn’t where they’re going but that 62% of Millennial parents are traveling with kids under the age of five, according to insights by D.K. Shifflet & Associates. It makes sense though, since kids under five aren’t yet bound by a school calendar and its limited vacation times.

According to MMGY’s 2016 Portrait of American Travelers, Millennial families represent 16% of all active travelers and account for around 9.5 million households in the U.S.

Millennial families reported that they intend to spend more on vacations, and they also tend to spend more on leisure travel than their single and couple counterparts. In 2016, Millennial families went on 36.9 million vacations, spending $50.4 billion, according
to MMGY. U.S. travelers intended to travel 6% more in 2017, but Millennial families intended to travel a whopping 35% more.

Millennials, who themselves seek different types of travel experiences, are clearly eager to share those experiences with their kids. Family trips are one of the fastest growing segments of the tourism industry, and even though the average vacation in the United States costs $4,580 for a family of four (according to American Express Spending and Saving Tracker), parents are willing to spend that money on something they feel is important to their family. “If you look at family spend as a pie chart, we definitely see more people valuing experiences, so travel spend actually is going up,” says Caroline Shin, travel expert and CEO/“Chief Vacation Officer” of Vacatia, a booking service touted as the Airbnb for family-oriented resort rentals.

Tour operators are paying close attention to the wants and needs of Millennial families, with many of them expanding their offerings with adventure and cultural activities for families with younger kids.

Austin Adventures injects local flavor into their family programs by working with indigenous guides in countries around the globe. In many of their itineraries, Thompson Family Adventures pairs pint-sized guests with a similarly aged kid in a host country for a pen pal program. Meanwhile, Classic Journeys offers “lively itineraries that satisfy the curiosity, energy levels and attention spans of multiple generations” in Ireland and Iceland, Cuba and Croatia, and exotic destinations in between. Craft sessions with local artisans? They’ve got that. Dune surfing? That too. Mountain biking on medieval walls? Yup. Lindblad Expeditions, which joined forces with National Geographic a decade ago, offers travelers young and old the chance to interact with explorers, photographers and researchers, as well as get their hands on high-tech toys like underwater cameras and hydrophones to listen in on whales. If you’re like us, you might be wondering how Millennials are paying to partake in these all-inclusive journeys to exotic lands. Our data shows that of those who take family trips, 34% go on multi-generational vacations, which might mean grandma and grandpa are the ones footing the bill.
As Millennial families acquire wealth and the kids in the household get more curious about the world, their bucket lists grow.

In the next two years, 40% of Millennials say they are most likely to vacation with friends, and an equal percentage say they prefer to stay with friends or family when traveling. Is this a case of “the more, the merrier”? Sounds about right. “With a growing emphasis on providing our children with experiences versus ‘things,’ the trend of multiple families vacationing together—blending friend and family travel—is one I expect to only grow with time,” says Shin. Millennials, she says, grew up in an on-demand world and value experiences over owning things. “I think that naturally leads them to ask, ‘Why do a family vacation and a friend vacation have to be separate? Why can’t we all go there together?’” With so many private home and resort rental options available online, planning a vacation for a large group is incredibly easy. In fact, 32% of Millennial families told us they prefer house and villa rentals. “More people are aware that there are non-hotel accommodations,” Shin says. “It’s freeing up the traditional definition of what a ‘family’ vacation is all about.”

Whether on a beach or mountain vacation, traveling within the U.S. or abroad, Millennial families in our study rank Dining as the top activity they enjoy while traveling and the quality and number of restaurants in a destination as one of the most important factors guiding their travel decisions. “Eating out is more than just food; it’s about the experience,” says Grant Sabatier, founder of Millennial Money, a personal finance blog. “It’s worth it to pay a little bit extra to go to a restaurant with a super cool roof deck, or an outdoor patio.”

Other than Dining, our survey shows that top activities for Millennials with kids include Fun Attractions like zoos (89%), theme parks (86%) and aquariums (85%). When it comes to Shopping, which 48% of Millennial families we surveyed say they enjoy regularly while traveling, malls and department stores are the most commonly visited. Their most desired future activities are Participating in a Once-in-a-Lifetime Activity and Volunteering.

As Millennial families acquire wealth and the kids in the household get more curious about the world, their bucket lists grow. African safaris, Arctic cruises (“Before it melts, Mom!”) or Inca Trail treks become more doable. And desirable. After all, many networked parents subsist on a daily feed of single and kid-less friends posting from coveted locations around the globe. Do not underestimate the Millennial FOMO (Fear Of Missing Out) or, for that matter, the bragging rights that come from showing friends (and every follower) that hard-earned GoPro photo of little Declan posing at the top of the Eiffel Tower. Or that drone shot of the family finally making landfall on the Galapagos.
FAMILY TIME AT THE SEA OF GALILEE IN ISRAEL
THE PENINSULA NEW YORK SETS THE STANDARD FOR GUEST VIP PROGRAMS
Listen to most prognosticators these days, and you’re likely to conclude that hotels are the newspapers of the travel sector. Disintermediation by the sharing economy and its addictive, convenient bellwethers like Airbnb and last-minute sell-off hubs like Hotel Tonight and its ilk have changed accommodations forever.

It’s absolutely true that an online, frictionless experience is just table stakes for any hotel or accommodation company. According to our Millennial traveler respondents, the less human interaction in booking a hotel or travel experience, the better. Two-thirds (64%) say they prefer booking on travel websites and close to half (47%) prefer booking through specific hotel, resort and airline websites.

But things get interesting from here. Travel agents are how 24% of our respondents prefer to book accommodation and travel. That edges out the mighty Airbnb (23%). Of course, the fact that the erstwhile home-sharing powerhouse has been around for a fraction of the time travel agents have means it’s gaining fast.

Hotels, however, still have time to evolve to avoid becoming the dinosaurs that some expect them to become. The runway for pivoting is quite generously long, extended by our respondents’ conflicted top factors when choosing vacation destinations. More than half of U.S. Millennials award high importance to safety (57%), which hotels have delivered forever. The second-most important factor? Cost, at 52%—a large part of the Airbnb value proposition.

Another unexpected insight from our U.S. Millennial respondents?

The most-preferred accommodation type cited is a full-service hotel or resort. As in: a business with many rooms, a lobby and someone to speak with in person immediately if there’s a bachelor party next door or your key doesn’t work.
After citing a regular hotel stay as their most preferred, #2 was staying with friends/family, followed by a stay at an all-inclusive resort. Roughly a third of Millennial travelers prefer upscale and luxury hotels/resorts (35%), followed by camping (33%) and apartment and/or condo (23%). The appetite for staying at Airbnb properties is surprisingly low, given the ubiquity of the company’s app on Millennials’ phones from coast to coast (not to mention the demographic’s pervasive appearance in the company’s marketing collateral).

That’s not to say that our U.S. Millennial respondents don’t embrace homesharing. They do. More than half (52%) of all Millennial traveler respondents said they regularly or occasionally use owner-direct rental services like Airbnb. But, as stated above, they are actually among their least preferred choices in terms of accommodation. Remember, only 23% said that an apartment and/or condo rental was their preferred type of accommodation.

Still, legacy hotel brands know that companies like Airbnb are only going to build on the fundamental transformation of consumer preference for low-cost, low-barrier, locally unique accommodation. A notable indicator to the inevitable growth of Airbnb—despite its current tepid positioning—is that its use is highest among our survey’s wealthiest participants. Airbnb and VRBO usage was highest among respondents with household incomes of $100,000 or more (63%).

Hotels have been dissecting the empowered, confident Millennial travelers for the past few years and are going all in with new properties and pivots with legacy ones.

The less-human-interaction-the-better booking experience is now evolving to front desks. In fact, some hotels are eliminating the front desk altogether. The Faena in Miami Beach allows for various self-directed check-ins: from your phone on your way to the airport, from a tablet in the hotel’s guest car or at a kiosk in the minimalist lobby.

By eliminating the chance of long check-in lines or lobby confusion that eat into the edges of an efficient hotel stay (while keeping security front and
center with smart elevators that deliver guests to only their floor), luxury hotels are increasingly treating sophisticated guests like adults. Of course, this Airbnb-like independence is made superior (and priced at a premium) due to the proximity of personal staff assistance at any time.

The deep focus on place and localism is another front in the war between hotels and home share services. Airbnb’s visceral “Live there. Even if it’s just for a night” campaign was just the beginning of the company imploring the world’s travelers to stop being confined to a tourist construct (which, of course, includes wasting away in a hotel room while the locally tapped-in are flooding their social media feeds and having the time of their lives just a few blocks away).

Given that 70% of our respondents indicated that Local Neighborhood and Community Events are things they enjoy regularly, enjoy occasionally or would like to try while on vacation, a hotel or accommodation business stands to gain a lot from bringing the outside in.

Increasingly, travelers seek fresh, inspirational and surprising ideas—regularly on rotation so nothing becomes too generic or smacks of repetition in their Instagram streams.

Airbnb, of course, is a year into its Trips functionality, of which Experiences is a key component. The company plans to offer Experiences in more than 50 cities by the end of the year. As of late August 2017, more than 700 bookable experiences were listed on the platform.

So what are “Experiences,” exactly? “Activities designed and led by local experts. Meet interesting community members, from street artists to pro surfers, and go on adventures you can’t find on your own,” promises Airbnb marketing.

A hotel’s ability to reflect and channel its surroundings, then, matters more than ever.

Some properties are themselves becoming local attractions. The Sonesta collection of hotels and resorts
THE POOL AT THE SONESTA HOTEL PHILADELPHIA
is also a high-end art gallery with exhibits in the hotel’s public spaces and even guestrooms.

Major works by Andy Warhol and Roy Lichtenstein draw art lovers even if they’re not guests, and hotel-commissioned pieces by up-and-coming local artists support growing art movements in local economies. Case in point: the newly redesigned Sonesta Philadelphia Downtown Rittenhouse Square, which provides onsite dedicated gallery space to the city’s Center for Emerging Visual Artists. With a new exhibit every six months, the property stays in the conversation. As the property literature extols, “When you travel to Sonesta Hotel Philadelphia, you will find we have let the outside culture in. We have taken the best kept secrets of Philadelphia and made them our own.” And just in case the hotel’s commitment to art buffs isn’t clear enough, a 22-story mural by abstract street artist Momo graces its exterior.

But sharing a place’s local secrets is just as important as becoming one.

One innovator in erasing the line between “accommodation” and “place” is Generator Hostels (as in not hotels). The fast growing company, bought in early 2017 by a London-based private equity real estate fund, begins its curation way up the travelers’ purchase funnel by showcasing local attractions in a regionally specific online city magazine called Parallel, “Generator’s online magazine about culture, community, and the cities we call home Parallel takes advantage of Generator’s long-standing presence in communities of artists, travellers and friends in cities across the world to create original content and direct you towards the places and people you should know.”

Of course, once inside, the experience is equally connected to the destination.

Yes there are minimalist bars that illuminate your mojito from below without any need for a filter, communal rooftops with life-affirming sunsets and even design-forward private rooms for under $100. But there is also a steady torrent of partnership-based activations: salons about city issues, DJ competitions, fashion shows and performance art.

“We feel these partnerships enhance the overall stay for each guest, because we’re adding to their perspective of a destination, and we’re also integrating them into local culture by exposing them to unique artists they may never otherwise hear of,” Generator founder Josh Wyatt told Beyond Luxury in 2016. “Additionally, when you have a great bar to hang out in—with live music and other guests that are great company—you’ve suddenly
graduated from the standard hotel stay that leaves you feeling disconnected from where you were visiting.”

If there’s one benefit hotels currently have that home-stays don’t, it’s the ability to fuel discovery by bringing people together—either on a roof top happy hour for guests only or at a WiFi-and-free-coffee-enabled morning work session.

Strangers will rarely gather at a vacation rental. That ability to connect—to see and be seen—is significantly reduced in an apartment, no matter how many Experiences you book. Of course hoteliers have known about the magnetic pull of hotels for more than a decade (see Ace Hotels) and in some cases a century (The Savoy). But today many hotels don’t dare open without programming and local partners.

Hilton’s new Tru flag, geared toward frugal young tastemakers, opened earlier this year and has already become the fastest growing brand in the Hilton portfolio. What’s the social fairy dust that distinguishes Tru from being another boring hotel? There’s no onsite restaurant, for starters. Instead, there’s Eat. & Sip.—a 24-hour market stuffed with local snacks and drinks (including beer and wine).

The lobby features pool, foosball and board games but also incorporates quiet nooks studded with power and USB outlets, free coffee and wireless printing. Breakfast is also free (and customizable) at the ingredients bar.

The investment is consistent with the responses of our U.S. Millennial travel sample group. Free Internet and WiFi access is clearly the most desirable hotel amenity (51% very desirable and 68% desirable), followed by privacy (39% and 57%). The high-ticket amenity of a swimming pool (33% and 50%) ranked third.

By opening up entire lobbies as business centers, hotels are already heeding Millennial preferences surfaced in our study, wherein only 21% of respondents identified a dedicated place to work (such as a business center) as a desirable amenity. Also undesirable was valet parking (25%).
Another amenity through which hotels are pulling away from home share services while reacting to the thirst for the authentic and exclusive: loyalty programs.

But what used to be rewards that rarely got more creative than a free stay or free breakfast are evolving quickly into branded exclusivity that used to be the rarefied air of luxury, premium flags.

Take the reimagined Hilton@PLAY program that connects “people around the world with enriching and playful experiences, encouraging them to seek out the unfamiliar.” By partnering with concert promoter Live Nation, Hilton has created a live music series right in Hilton hotels across both the U.K. and the U.S. (There’s that “bringing the culture into the hotel” edict again.)

Intimate concerts by chart-toppers like Tegan and Sara and Nick Jonas resonate with a guest far longer than a free hotel night.

Earned media is pretty much guaranteed given the demo, but Hilton helps its case by live-streaming all the shows on Twitter’s Periscope, thereby advertising the perk (and the loyalty program) to a massive new audience.

Keeping its focus on the Millennial appetite for exclusive and local experiences, The Peninsula Hotels experiences include a red-carpet photo shoot with photographer-to-the-stars Ryan Forbes for guests of the The Peninsula Beverly Hills, or learning how to make dim sum with master chef Henry Fong at The Peninsula Hong Kong.

Despite all the innovation on display by Millennial-focused hotels, the gap we see is child-friendly amenities. Our respondents indicated their most likely vacations in the next 24 months will be family vacations with kids (44%), which edges out even vacations with friends (40%).

Given the ability to rent an entire (family-sized) apartment for the price of a standard hotel room in most cities around the world, it’s a blind spot that no amount of illuminated bar or local knowledge will fix.
Fitness, health, wellness and wellbeing are provocative, overlapping, trending and entirely ill-defined buzzwords in the U.S.

Take the word health—perhaps the most bewildering of all in 2017 for everyone, including Millennials. Between conflicting messages around health care and its repeal, terrifying obesity rates (Centers for Disease Control and Prevention says that 36.5% of adults are obese—more than the percentage of the merely overweight) and a generational questioning of authority that includes distrust of ‘Big Pharma’ and ‘Big Food,’ Millennials are looking for answers about health and wellbeing in unorthodox places.

Certainly, health is important to them. In fact, 71% of Millennial travelers in our study enjoy Health and Fitness activities while on vacation, just below attending Cultural Events and Performances (74%) and Nightlife (76%).

But they don’t define health—and, by extension, fitness—the same way older generations do. According to The New World of Healthcare: What Millennials Want, a study of 2,000 adult Americans by greyhealth—part of WPP, the world’s largest communications group—Millennials define health as “physically fit” and “happy” while non-Millennials choose the definitions “free from illness” and “physically fit.” Says WPP, “This new injection of mental health—more frequently than being ‘free from illness’—demonstrates the holistic outlook of the Millennial generation.”

Ironically, this generation’s modern, holistic definition of health corresponds closely with the definition of health the World Health Organization framed in 1946: “Health is a state of complete physical, mental and social wellbeing and not merely the absence of disease or infirmity.”

Today, physical fitness + happiness together are referred to variously as health, wellness, and even, more recently, wellbeing. In 2014, the Global Wellness Institute estimated the worth of the wellness industry as $3.4 trillion dollars worldwide—three times more than the pharmaceutical industry.
The importance of a combination of physical fitness and happiness is also reflected in our data, which shows that working out and spa treatments are the two preferred health and fitness activities for traveling Millennials: 80% of men and 81% of women enjoy fitness-enhancing working out regularly or occasionally, and 68% of men and 77% of women enjoy happiness-inducing spa treatments—significantly more than non-Millennials.

Spas, which have gone from places of indulgence and pampering to oases of self care, spiritual enrichment and cultural experience, are as important as Fitness Centers among “very desirable” hotel amenities (18%) and are more prized than Interior Design/Style (17%). Counterintuitively, more men than women in our survey said that they think spa facilities and programming are desirable (38% of men to 29% of women), and they ranked them just ahead of Fitness Centers (37% of men consider these desirable compared to 24% of women).

It turns out that men are increasingly comfortable in spa settings, particularly when the spas look and feel masculine: In a story called “A Man Cave, but for Manicures,” GQ reports that many spas designed for men also offer a shot of bourbon or scotch as part of the service. Changing attitudes toward male grooming in the last decade have birthed an industry, in both urban and resort settings. GQ says that according to the International SPA Association (ISPA), 49% of spa-goers are now men, compared to just 29% in 2005. Significantly, messaging for men revolves around health and wellness rather than indulgence, self-care or “me time,” which are common themes for women. Lynne McNees, president of ISPA told GQ, “It’s more about, ‘I want to be better, I want to make something better, I want results, I want to improve something,’ and really being able to see a difference.”

For Millennials, health, fitness and wellbeing are experienced in very different ways than for previous generations, all of which influence their expectations when they travel. The wealthy among them were the first generation brought up with organic food as a touchstone, exotic travel as a birthright and taking matters into their own hands as technology’s gift to their generation.
Even when they’re not traveling, Millennial women experience healthful adventure all over the world via their favorite Instagram guides—Millennial peers who combine travel, food, health and wellbeing and reap followers in the hundreds of thousands. These young women share their journeys into health from the perceived wellbeing capitals of the world: Hawaii and Bali are favorites, and several call sun-kissed Australia home. Stylish, wholesome, fit and almost always blonde, they live on beaches, surf and swim, are fueled by healthful and photogenic “bowls” containing the ingredients of the moment, and use vocabulary punctuated by “glowing”, “radiant” and “the best version of you.” They frolic in the company of adorable, fit and compliant husbands who take no issue with pretending not to pose for pictures and carting around their children (always two, always tousled, always one of each gender, always also blonde). The workouts and recipes that have made everyone fit and happy are as close as a click on the bio in the Instagram profile. A few of these self-made health and fitness gurus have education in coaching or nutrition. Most don’t.

All this to say that when Millennials travel, they often seek to tell their own version of this idealized and aspirational story, and destinations and hospitality providers are eager to help them. “We’re seeing the Millennial market seeking adventurous, unique and special experiences—not necessarily for the workout per se, but rather for the excitement and health of it,” says Lynn Curry of Resources for Leisure Assets (RLA), consultants specializing in leisure and recreation developments as well as health tourism. “Its uniqueness is important. So, obviously, is creating opportunities for connectivity, wired and personal. Being able to share once-in-a-lifetime adventures via social media and with new friends in person is key,” she says.

So what constitutes a unique adventure? Sure, running on a palm-fringed beach is Snapchat-worthy, but Curry gives the example of scaling the world’s tallest climbing wall, outside of Basecamp Hotel in Reno and man-made. Destinations and hotels are having to up their games because increasingly, unique health, fitness and wellness experiences aren’t in traditional fitness spaces at all, and Millennials are accustomed to innovation.
Destinations are increasingly incorporating Mother Nature’s gym, accessing areas outside the hotel that put Millennials in touch with the neighborhood.

During the 2017 summer solstice, practitioners prostrated themselves on yoga mats on the asphalt in New York’s Times Square; and yoga and tai chi classes are held all summer in Bryant Park in the heart of Midtown. In spring of 2017, Saks Fifth Avenue baptized an entire floor of its 5th Avenue flagship The Wellery combining yoga and fitness—including crossfit classes taught by ex-cons—with a salt therapy room, CoolSculpting fat reduction, fitness gear, high-end bike retailers, meditation and many other services and products that could loosely fit into the fitness/wellness category.

And as cruises become increasingly popular with Millennials, ships are shaping up, too: a partnership between Lindblad Cruises and Exhale, described by Travel Weekly as a “lifestyle and fitness brand with health and spa clubs across the country,” will make the National Geographic Seabird a veritable fitness club and adventure basecamp in the Sea of Cortez. On the menu, says Travel Weekly is everything from customized photography classes and snorkeling with sealions to core fusion barre, bootcamp, high intensity interval training classes, Exhale power yoga classes on deck, yoga on stand-up paddleboards, hikes and group meditation. And evening cocktails, of course.

For RLA’s Curry, who consults with real estate, hotel and resort developers, the ubiquity of health and wellness means that providers need to consider every part of a destination—not just the fitness center and spa—as part of the visitor’s wellbeing experience—an idea RLA calls “Wellbeing Hospitality.”

“A spa doesn’t have to be a spa in a box,” she says. “Treatments can be all over the property.” And destinations are increasingly incorporating Mother Nature’s gym, accessing areas outside the hotel that put Millennials in touch with the neighborhood. “If you know that a guest runs 10 miles a day at home, you can give them a GPS with a particular route that will challenge them,” she says.

The Millennial fitness + happiness idea of health means that many touchpoints of a destination are important. “There’s the wellbeing of the social aspects of the lobby bar,” Curry says. “There’s the experience of just moving between spaces in a resort. How does the art on the walls feed into wellbeing? Are there places to charge phones all over the property? What is the scent of a space? How is the history of the area celebrated?”

Certainly, just as their Boomer parents did before them, Millennials are upending ideas that were taken for granted—even the very idea of what it means to feel good. On vacation or at home, that’ll have a profound effect on the way the next generations live.
Ah, the Great Outdoors. For many generations, Baby Boomers and Gen-Xers in particular, the outdoors offer solitude—a chance to get away from it all, to really connect with nature but also to test personal physical limits. Look at outdoor ads from tour companies, gear manufacturers and retailers from 15 or 20 years back, and they probably tell the story of endurance and self-reliance. Most likely they feature a lone hiker fully kitted at the edge of a precipice, a rock climber sleeping in a hammock suspended halfway up a cliff or a kayaker plunging perilously over a waterfall. Intimidating? Yup. Accessible? Not really. That’s simply not how most Millennials roll—or would even want to roll if they had the means. And the outdoors industry is taking notice.

Our Future of U.S. Millennial Travel survey shows that in the next 24 months, 34% of Millennial travelers plan to go camping. That number is only a few percentage points shy of those who plan to visit a major metropolitan city (38%). This is some staggering insight.

After years of decline, the camping industry is growing, and it’s growing fast thanks to Millennials. Kampgrounds of America (KOA), the world’s largest system of privately held campgrounds, recently surveyed thousands of campers for their annual report and found that an estimated 13 million U.S. households plan to camp more in 2017 than they did the previous year. More than one million new households have started camping each year since 2014. How many of these new campers are Millennials? Of the 75 million active camper households in the U.S., 38% are aged 18 to 35—up from 34% in 2016.

Back in 2015, REI announced it would close its doors on Black Friday to encourage customers to enjoy the outdoors instead of looking for shopping deals. The campaign, which featured the hashtag #OptOutside, resonated with Millennials on social media and spread like wildfire. The hashtag was accompanied by a meme generator, which encouraged people to share their own outdoors experiences, and a partnership with a geo-mapping service that designed a mobile site to help less-experienced outdoor enthusiasts find appropriate
locations in their area to enjoy nature. The campaign was so successful that REI brought it back in 2016. “As a nation we’re still spending over 90% of our lives indoors and it’s a trend we need to tackle,” said REI CEO Jerry Stritzke. “The moment we announced our decision [to close on Black Friday], people who build their lives around the outdoors really embraced the idea of reclaiming Black Friday. It took on a life of its own and became about much more than REI.”

Jerry Stritzke, REI CEO

That’s a lot of tents and outdoor equipment to be sold. Indeed, brands like The North Face, which for decades focused specifically on technical gear for avid adventurers, are now also producing street style-inspired, user-friendly and comfortable products that look as good on the subway as they do in the subalpine. For those who aren’t ready to invest in outdoor equipment, or perhaps don’t have the room in their cramped city apartments to store it, companies like REI offer weekend rentals. For Millennials, and particularly those traveling with kids, renting in the final destination makes sense as it saves excess baggage fees (and transportation hassles) on commercial flights. Renting also gives young people opportunities to “try before you buy.” Renting toys that add that extra oomph to any #WeekendVibe adventure makes a lot of sense, plus there’s the coolness factor of trying gear that photographs well. A favorite on Instagram with Millennials around the globe is San Francisco-based Oru Kayak, which makes an origami-inspired kayak that folds to the size of a suitcase, can be easily shipped in a box and fits in the trunk of a car. The company is also looking at launching a weekend rental program.

The campaign became so popular that some 150 additional brands, retailers and organizations participated in #OptOutside. One of them, the National Parks Service, counted more than 330 million recreational visits to U.S. national parks in 2016—a 7.7% increase from the year before. Sure, the centennial anniversary of American parks propelled visits, as did the White House’s “Every Kid in a Park” ad campaign, aimed at older Millennial parents to have every fourth-grader in the country visit at least one park between September 2016 and August 2017. But visits to national parks were already on a five-year upswing in visitation nationwide, according to the National Park Service.
HIPCAMP, an Airbnb-type rental site for campers, makes it easier for users to find and reserve unique spots, while Tentrr is an online company that makes camping dirt simple (catchy slogan, right?). The site features campsites located on dreamy private land where tents are already set up and ready for you when you arrive. Pitching a tent? Someone’s already done it for you. This is more glamping (glamorous camping) than camping and appeals to the Millennial aesthetic—some sites come with hammocks, firewood and other amenities—and philosophy of just showing up for the party, as it were. Tentrr also offers curated experiences, such as morning yoga with a certified trainer or energy healing sessions with a Reiki master.

For Millennials the great outdoors is more like the great outside. According to the Outdoor Industry Association, research conducted by global design firm IDEO found that many Millennials view the outdoors as something that starts at their front door and is part of everyday life. Jill Levinsohn, IDEO’s team leader for the Outdoor Retail of the Future Project, stated as far back as 2013 that for the Millennial generation, you have to rethink “outdoorsy” as “outsidesy.”

Sure, 18- to 35-year-olds are keen to get out there and breathe in all that fresh air and maybe do a little hiking, mountain biking or kayaking, but they want to do it surrounded by friends and family. If you’ve read through the chapter on vacationing with kids (“Not Kidding Around,” pg. 24), you know that 44% of Millennials are planning to go on family trips in the next two years. Introducing kids to nature and the outdoors is just as important to Millennial parents as is introducing them to new cultures and experiences. “We’re seeing that once these younger campers experience the outdoors and the benefits of camping, they become hooked on it and it becomes part of their lifestyle,” says KOA’s COO Toby O’Rourke. “As parents bring their children along, we’re already seeing their love of camping being passed on to the next generation.”

Camping has become a social activity, and not just social as in, “Let’s bring the whole family and a bunch
HIPCAMP—A SHARING SERVICE FOR CAMPERS—OFFERS UNIQUE SPOTS LIKE THESE CABINS IN BLUE SKY CENTER, CALIFORNIA
of friends” but as in “Let’s document every aspect of this experience on social media.” Unplugged camping? Yes please, said no Millennial ever. KOA is redesigning some of its nearly 500 campgrounds across North America to give Millennials what they want, and that includes WiFi in addition to onsite activities like canoeing and fishing. No big surprise there. After all, about half of Millennials told us that while on vacation they check in on Facebook (57%), they post updates on Twitter and other platforms (51%) and they share photos on Instagram (43%) every day. Some do all of the above hourly.

Connect with nature? Sure, as long as they can connect to a signal. Millennials are probably able to “get out there” more often now that campites offer technology access. Those three-quarters who told us they check text messages (77%) and email (71%) on the reg can also check in at work from the comfort of their own tents.

That’s not to say that Millennials aren’t discovering, along with good reception, the emotional and physical health benefits of time spent outdoors. According to this year’s KOA report, Millennials in particular say that camping has a great deal of impact on reducing stress, contributing to their emotional wellbeing and fostering a healthier lifestyle.

Do a quick search on Instagram for #camping and you’ll turn up more than 14 million tagged posts while #NeverStopExploring (The North Face’s popular tag) and #OptOutside result in more than 12 million and eight million, respectively. It won’t take too long to find posts of bright-eyed and bushy-tailed campers roasting marshmallows around a campsite or a gaggle of friends on their mountain bikes riding through an evergreen forest.

In today’s heated political landscape, where Democrats and Republicans seem to agree on very little, many Americans are turning to the outdoors as a place they can go—together—to calm the mind, heal the soul and rebuild strained relationships. If there is one thing Americans can agree on, it is the transformative power of the outdoors.
Millennials are the first generation to grow up surrounded by (and adapting to) high-tech gadgets. Indeed, most Millennials were practically raised on the Internet and social networks. Today, these modern travelers share and consume more content on more channels and devices than ever—and definitely more so than any other generation. Facebook, Instagram, Snapchat, Twitter, YouTube... the list goes on. The desire to document every moment of their #vacation—and to post images, videos and other information publicly—has significant implications for the travel sector.

According to an article in *Forbes* magazine, “Millennials aren’t just looking to social media to enjoy pictures and stories about exotic locations. They’re using it to determine where to go, when to get there, and what they should do when they arrive.” Based on our research, 24% of Millennial travelers consider social media postings by friends and family to be extremely important when it comes to deciding on a vacation destination. However, a similar percentage (22%) continue to read magazine and newspaper articles to make travel decisions, proving perhaps that print is not dead quite yet.

It’s why relevancy comes easier for brands that don’t interrupt the Millennial traveler in the hope of getting noticed but co-create and empower this elusive target market. Experiences resonate exponentially when they’re shared by travelers—and free earned media follows. But tourism brand hashtags and re-grams are just the beginning of converting Millennial travelers into brand evangelists. In mid 2017, Royal Caribbean set the bar with their “SeeSeekers” campaign: a scuba mask equipped with Snapchat Spectacles that the cruise line hopes to begin renting out later this year. By embedding shareability in equipment rental that would happen anyway, Royal Caribbean has essentially
reverse-engineered a platform-specific user-generated campaign. That they’re able to charge for rentals is just gravy. They’re not the only cruise line to go hi-tech. Later this year, Princess Cruises will offer wearable devices to unlock cabin doors, make shipboard purchases and serve as navigation devices to allow friends or waiters to find passengers.

Once U.S. Millennial travelers are ready to book, their path to purchase also strays significantly from older demos. Instead of going through travel agents, as other generations still do, our survey shows that Millennials prefer to book their vacations online, with two-thirds of those polled booking on travel websites and close to half booking through specific hotel, resort, and airline websites. Not surprisingly, Millennials are not getting on the phone to book travel. In fact, less than one-quarter have booked over the phone with a specific hotel/resort/airline (24%) or through a travel agent (24%).

Being keenly aware of this aversion to human interaction when searching for accommodations is an opportunity that booking and hotel brands are seizing.

Earlier this year, The Venetian in Las Vegas was the first in the city—and among the first in the nation—to offer bookings through Facebook Messenger with the aid of a chatbot. Named “Luis,” the bot answers rate and availability inquiries all in the Messenger app.

A relative vet in the Facebook Messenger-enabled booking game is Expedia, which for more than a year has used a bot to source traveler preferences with a few standard questions before surfaced hotel recommendations that link to the Expedia site.

Millennials are plugged in 24/7—at least it certainly seems that way. And they don’t take a digital detox when traveling, either. So what’s this generation’s most coveted amenity when booking a hotel? Free WiFi access, of course. On a daily basis, three quarters of these connected travelers send text messages and check emails. Men are more likely to conduct most activities on their mobile phones or computers while on vacation. The online experience continues for all Millennials when they arrive at their destinations, with 67% saying that on a daily basis they visit websites.
Our survey shows that on Instagram alone, 11% of Millennials share images hourly, and 43% of them do so daily.

to research things to do during their vacations, and 11% saying they check travel guide apps hourly while traveling. What do they do after they’ve been there and done that? In our study 10% of Millennials polled said they post online ratings and reviews of their experiences every hour. Thirty-four percent of them do so daily.

 Millennials have their phones practically glued to their hands, with more than half of them constantly checking in on Facebook or other social networks. Those residing in Western and Northeastern U.S. are more likely to share images on Instagram and use travel guide apps. They share not just with family and friends but also with complete strangers who don’t just follow their accounts but are truly engaged with their content. (Some of these Millennials have mastered the art of sharing their experiences, growing their social media accounts into the hundreds of thousands and in the process becoming Influencers—social media celebs, if you will.)

Brands understand that social media and technology play a huge role in appealing to the Millennial mindset. Last year, Nielsen Norman Group reported that around 90% of Millennials had at least one social media account. Many of them had more than one. (In 2015 the average reported number was four accounts.) Brands today need to embrace the power of UGC (user-generated content) over traditional advertising if they want to connect with this generation. And today, many destinations and hotels have a strong presence on social media, often working with and relying on Millennial Influencers to create unique opportunities to reach, engage and drive bookings.
Knowing that Millennials are more likely to turn to their online contemporaries than trust traditional advertising when making travel decisions, Turkish Airlines recently collaborated with high-profile YouTubers on a campaign that connected the brand with an audience of 40 million people. Meanwhile, one brand that’s doing UGC well is Aloft, which describes itself as a hotel for global travelers who love open spaces and creative expression. Everything about Aloft is designed with the goal of appealing to Millennials, including live music and communal pool tables that encourage social interaction between guests and, of course, free WiFi. Aloft guests aren’t just likely to hang out at the hotel but also to share their photos and experiences across social media throughout their stay.

Indeed, more than half of Millennials polled said they take and post pictures on social media, they check in on social networks, and they post comments and updates on Facebook and Twitter—and they do so every single day. Our survey shows that on Instagram alone, 11% of Millennials share images hourly, and 43% of them do so daily. That’s a lot of social media activity. It’s no surprise, then, that a Millennial’s path to travel—both purchase and experience—has become nonlinear. Unlike past generations, these consumers don’t decide on a destination, research what to do or where to stay, and then purchase the required tickets. Instead they turn to their family, friends and influencers within the ever-growing social media world to find travel and vacation inspiration and even deals to support their newly discovered destinations. Our survey found that 31% look at online peer reviews and ratings while on vacation. They read blogs, visit travel forums and review sites when researching destinations, which they do while on vacation, often just as they’re heading out to brunch or to a cultural site. About a quarter of Millennials see social media posts by friends and family as a key factor when deciding where to eat and what to see at a destination.

There’s no doubt that for the always-connected Millennial generation, the Internet and social media are the new travel agent.
43% of millennial travelers post and share images on Instagram daily while on vacation.
WE NEED TO TALK ABOUT AIRBNB

If you took your eye off Airbnb recently, it’s time to refocus on a company that intends to take over the entire travel funnel in the next few years.

That’s not hyperbole: Airbnb doesn’t hide its ambition to scale its reinvention of the accommodation industry across the tourism prism. It is, after all, winning its insurgency against hotels, so other dominos look equally compelling. In the summer of 2017, Airbnb surpassed four million listings globally. Incredibly, that figure represents nearly one million more listings than the combined inventory of the top five hotel brands—Marriott International, Hilton Worldwide Holdings, Intercontinental Hotels Group, Wyndham Worldwide and Hyatt Hotels Corporation, according to Hotel News Now.

That kind of sector domination means giddy investment, which resulted in another eye-popping number released in mid 2017: a $31-billion valuation for the company. It’s the second-highest valued startup in the U.S., behind another local regulation-flaunting sharing-economy stalwart, Uber (valued at $62.5 billion).

The San Francisco-based company—launched less than a decade ago in 2008 at Austin’s South by Southwest festival with two bookings, and conceived when its founders rented out air mattresses in their living room to help make rent—is now worth only $7 billion less than the market cap of Marriott International. As in “the world’s largest hotel company.”

An IPO is expected over the next year, at which point the hotel industry will have a new valuation king—one with a fraction of owned properties and full-time staff of legacy companies.

How Airbnb was able to catch fire so quickly—spreading to 191 countries, 65,000 cities and (because this company never passes on a chance to differentiate itself or float a shareable fun fact) 1,400 castles—is a blueprint for removing friction in user experience while empowering the indulgence in experience.

It is, after all, a game of experience, memories and humble-brags vs. ownership and its perceived kryptonite to mobility and freedom.
Airbnb, it seems, is a correlative reaction to the sentiments expressed by our U.S. Millennial traveler sample.

As we highlight at length in this report, safety and cost are the two most important factors when U.S. Millennials are deciding on vacation destinations. The fact that Airbnb listings offer the opportunity to spend as little as $10 for a room in some countries, while being able to read deep background briefings—sans marketese—from travelers just like you is a powerful motivator to choose the company and its user experience.

Airbnb seamlessly combines, compares and serves up the two most important factors when U.S. Millennials are considering travel. Safety (the most important destination consideration factor at 57%) was an early PR nightmare for the company—with legacy hospitality brands and the media where they advertise sounding early alarm bells about trashed houses, assaults and general inconvenience usually (but not always) avoided at traditional hotels.

By moving quickly to close loopholes and closer vetting hosts and guests with verified IDs, prominent member reviews and a mobile-optimized IM feature, Airbnb has armed its community to better patrol the ecosystem through transparency.

With safety (relatively) under control, the company appeals to cost (Millennials’ second-most important factor when deciding on a vacation, at 52%). That abundance of choice (65,000 cities, remember?) at price-points ranging from a couch in Eastern Europe for the price of a fancy American coffee to a luxury vacation rental with a pool that you can splash out on as a couple or stuff with a half-dozen friends to save costs plays perfectly to customizing budgets.

As we mentioned in Chapter 1, the U.S. Federal Reserve’s most recent Survey of Consumer Finances found that the average net worth of U.S. millennials 20 to 30 years old was between $2,093 and negative $38,915. What things cost matters to U.S. Millennials. And the total is right there on their phone before they commit—without resort fees or WiFi charges ladled on upon checkout.

To a lesser yet notable degree, the simple fact that global Airbnb listings appear in English ticks off the third-most important factor when choosing a vacation destination. Our U.S. Millennial respondents indicate that whether English is spoken is a factor for 44% of them—even more important than quality of the natural environment or scenery (42%).

Given this overt alignment with U.S. Millennial traveler priorities, Airbnb is getting their business.

More than half of our respondents (52%) indicate that they use owner-direct accommodation services such as Airbnb and VRBO, with regular use by 22% and occasional use by 30%. Interestingly, despite the cost advantage, home-sharing usage is highest among our respondents with household incomes of $100,000-plus (63%) and those residing in the western U.S. (63%).

Aside from the masterful removal of friction from booking logistics, Airbnb’s true strength is in tapping into the community of locals.

Their Cannes Lions award-winning ad campaign, released last year, hammers home that a worthwhile trip is not taken by tourists but by travelers.

“Don’t go to Paris. Don’t tour Paris, and please don’t do Paris,” the ad voiceover pleads as footage of tourist crowds flashes by like a breaking story of a plague. Then, the guiding light. “Live in Paris.”

The larger campaign evolves from this: “Wherever you go, don’t go there. Live there. Even if it’s just for a night.”

Of course it’s another direct hit with our respondents, who overwhelmingly crave personal, local and immersive experiences in their destinations. Venturing out of their comfort zones and Learning New Things are prioritized by 85% of our respondents, right after obvious activities like Dining (91%), Fun Attractions (90%) and Sightseeing (88%).
Additionally, when asked what specific activities on vacation they enjoy regularly, occasionally, or would like to try, local cultural pursuits are the priority. Local Neighborhood and Community Events are prominent, at 70%, followed by Seeing Plays or Musicals, Music Festivals, and then Food and Wine Festivals. Local immersion was even more important to U.S. Millennial respondents with household incomes of $100,000 or more.

That will certainly be validation to Airbnb co-founder Brain Chesky (not that he needs it) and his plans for moving beyond sleeping like a local. “I don’t think Airbnb is about providing a place for people to sleep,” he told a marketing conference at the Cannes Lions International Festival of Creativity in 2016. “I think that we’re supplying the means to connect people. Homes is where it is starting, but I think going forward we want to look at that end-to-end journey.”

Since then, the company has launched services like Trips, Experiences and Places—either standalone apps or Airbnb features allowing users to “live there” even deeper. By increasingly unlocking the insights and knowledge of locals beyond hosting duties, guests can venture beyond the four walls of a place. Not surprisingly, this is at least a partial reaction to the hotel industry’s counter-offensive—one that on more than one occasion painted Airbnb guests as isolated hermits compared to hotel guests indulging in networking, discovery and VIP events in lobbies like craft beer tastings and pop-up gallery shows.

Such gatherings are unlikely in a home share, lest you void your Airbnb contract.

Given that our respondents—as proxy for the majority of U.S. Millennials—identify participating in a Once-in-a-Lifetime Activity as the most-desired future activity (36%), Airbnb’s ongoing story-ficaiton and spotlighting of destinations through the lens of homes and hosts piques the interests of young travelers.

This timely, purposeful, immersive offering is made possible by a decentralized product approach that allows access and differentiation. Take last year’s
TRAVEL BOOKING METHOD

<table>
<thead>
<tr>
<th>Method</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel website</td>
<td>64%</td>
</tr>
<tr>
<td>Specific hotel/resort/airline brand website</td>
<td>47%</td>
</tr>
<tr>
<td>Over the phone with the specific hotel/resort/airline central reservations</td>
<td>24%</td>
</tr>
<tr>
<td>Travel agent</td>
<td>24%</td>
</tr>
<tr>
<td>Airbnb</td>
<td>23%</td>
</tr>
<tr>
<td>Tourism destination’s website</td>
<td>22%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
</tr>
</tbody>
</table>

Base: All respondents (n=1,548)
A4. In the past 12 months, which of the following have you used to book your vacation travel?

Those experiences—timely, shareable and based in the brand’s unique value proposition of interesting places to sleep, with which a chain hotel can’t keep up—are increasingly evolving into corporate partnerships. Late last year, Pantone Color System and Airbnb partnered to paint a house listing in London in the company’s Greenery “Color of the Year” for 2017. Guinness did the same as part of Airbnb’s “Night At” series, in which people were given a chance to win a night in the iconic Gravity Bar in Dublin.

Airbnb Trips and Experiences also just partnered with Vice Media to experience the people and places covered by that seminal curator of youth culture. The collaboration will ensure that Airbnb’s educational, people-driven marketing materials will be even slicker... and in front of way more customers who are ready to drink the Kool-Aid.

All of which raises the question of why these shareable, unique, culturally authentic experiences weren’t commodified and owned by travel brands before Airbnb came along. The follow-up is what other experiences along the travel funnel are in the company’s cross-hairs.

Expansion into luxury listings is a given, with the company’s purchase of Montreal-based Luxury Retreats last year. Founders have also mused about an airline. Against all market indicators (and our survey respondents’ indication that print was the least influential source of potential travel decisions), the company launched Airbnbmag, a print magazine, earlier this year as well. But given its plans to distribute the publication across its millions of rental units, this seeming side hustle will boast a greater reach than many decades-old glossy incumbents. And if Airbnb can do this with a seemingly moribund media format, just imagine what’s possible with an industry that’s just merely satisfied with the profitable status quo.
ONE OF AIRBNB’S FASTEST GROWING CITIES IS HAVANA. HOW MANY HOTEL COMPANIES CAN SAY THAT?
Question: What is the point of exploring the world if your search never ends? That is, is searching and traveling a means to an end? What if you find a place that checks all the boxes—that special blend of proximity, solitude and affordability? What then? Do you put it back into rotation among all the other travel destinations on your list, or do you double down on what works and buy in permanently?

Despite the infinite clichés of the fleet-footed Millennials, more than half of our U.S. Millennial respondents (52%) indicate that they would like to own a vacation property one day. In fact, almost a quarter of U.S. Millennial travelers surveyed (24%) are considering purchasing a vacation property of some type in the next two to three years.

These numbers represent a profound intention to buy, one with a significant growth opportunity considering that only 23% of respondents indicated that their family already owns a vacation property. Not surprisingly, U.S. Millennials we surveyed with a household income of $100,000 or greater are more likely to already own or have access to a vacation property (at 32%).

So what’s behind this interest in vacation home ownership?

All you need to do is look at the logistics and travel patterns of our sample group. The top three types of vacations planned in the next 12 to 24 months among our respondents are Family Vacations with Kids (a whopping 44%). Vacations with friends tied with Beach Resort Vacations for second place at 40%.

Have you ever tried to enjoy a vacation in a hotel room with a kid or three in tow? Especially if a mini-fridge is jammed with $14 vodka sippers and the nearest microwave is five stories up? Given the sheer volume of travel with kids planned by U.S. Millennials, a kitchen (or kitchenette) to call one’s own is an oasis. Then there’s the validation of having made it when you invite an old (or new) friend to your, ahem, vacation pad. Sure—you can tag me in your Instagram of my cozy fireplace in ski country.
“Buyers today are adventurers and explorers. They don’t want to be behind gates.”

GREG ASHLEY, CHIEF STRATEGY OFFICER, REPLAY RESORTS

The vacation home preference of our surveyed sample is a close match to their overall travel experiences. Vacation Properties Located Near the Beach are most preferred. Current vacation homes are most likely to be located near a beach (40%) or in a major city (38%). This matches perfectly with their upcoming vacation types, where beaches and cities rule. For future vacation home owners, being near a beach is clearly the most preferred at 68%, followed by in the mountains (43%) and near a lake (42%).

It’s interesting that although being in a major city is among the top two locations for current vacation homes (could that be their parents’ place, perhaps?), it’s the least desirable among prospective future owners who are likely thinking about how they will vacation with their own kids in the future.

When it comes to what features are most important in choosing a vacation home for these future buyers, proximity to a beach, guestrooms for family and friends, and outdoor space are as important to them as buyers in other generations. Where they differ is in
the importance of being pet-friendly and a vacation home’s proximity to restaurants, shopping and nightlife. While prior generations valued gated communities, this generation seems to want to get away but still be part of the action. Developers like Replay Resorts consider this key to the success of their investment in both current and future projects.

“Our focus is developing in areas that have an infrastructure in place,” says Greg Ashley, chief strategy officer at Replay Resorts. “Our projects amplify the experience of a place and we create opportunities for people to experience the opportunity to live like a local,” he says. “We typically don’t develop gated communities. Buyers today are adventurers and explorers. They don’t want to be behind gates.”

One of the most surprising findings when it comes to Millennials and vacation homes is the preference to buy a vacation home before a primary home in the place where they currently live. Historically, the purchase of a “second” home for vacations was just that—a purchase that followed acquiring a primary home in the place where one worked. But while real estate prices in many cities have soared since the last economic downturn, prices in vacation destinations have been much slower to rise, likely making real estate ownership in a vacation destination that much more desirable for some.

“San Francisco is so out of reach for the average person, but Big Sur isn’t and certain parts of Sonoma,” Carl Shepard, co-founder of HomeAway, the parent site that operates vacation rental sites VRBO.com and VacationRental.com told The Street in 2015. “The notion of buying your second home first is a wealth building activity,” he said. “Young people are smart and they realize that in order to build equity and income they do need to have a home. I think all the trends are pointing that younger people are buying these homes with the intention of renting them.”

That certainly is the case with our respondents, with a whopping 53% of those who are considering buying or would like to buy a vacation home one day saying they were “somewhat” or “very likely” to purchase a vacation home before buying a primary residence. For
Almost two in five (39%) future owners we surveyed would like to manage and rent out vacation home themselves on a short-term basis through a service like Airbnb.

Will developers be able to create products that meet both Millennial requirements in terms of location and features at these price points? That remains to be seen, but the rise of Airbnb, for this generation in particular, may have not only disrupted the hotel industry, but changed the economics of vacation home ownership as well, thereby creating an opportunity for the entrance of new product types in an industry that hasn’t seen much innovation since the introduction of shared ownership decades ago.
THE FUTURE OF VACATION HOMES IS BRIGHT
Young travelers are not ‘escaping’ through travel as much as they’re collecting experiences and pursuing opportunities for growth.
The firehose of statistics, necessary pivots and fire alarms about Millennials, and increasingly Gen Z, will not relent. And it shouldn't.

Throughout this Future of U.S. Millennial Travel Report we have highlighted many of the ways—statistical and IRL—that consumer behavior is at an inflection point. Millennial consumers—especially empowered, fearless, efficiency-seeking Americans—have been brought up in a culture that will never resemble that of their parents… or even older siblings.

Lucky for marketers, tourism professionals, city managers and real estate developers, “the U.S. Millennial” is just shorthand for where we’re all headed as consumers and travelers. By continuing to watch, study and research this increasingly powerful and wealthy demographic—the way they adopt early and often, how they value ownership over access—we have the opportunity to future-proof our own services, products and destinations.

It’s also an incredible opportunity not just to prepare for the future but to shape it. In a present-day reality where brand allegiance is dropping and the product that’s most convenient can ascend to market domination (and profitability) in record time, the chances to capture attention and differentiate from competitors are plentiful. Of course this is possible without having to create the next Airbnb. Small iterations to your development, city or destination will endear you to a generation that, according to a recent Berkley Research Group study, has the annual buying power of $200 billion. But, according to the Brookings Institution, they would also prefer “making $40,000 per year at their favorite job than making $100,000 at a job they think is not attractive.”

A new Deloitte report on the travel sector noted a shift in the past 12 years among consumers in which the relative proportion of spending for goods fell while spending for services rose. Experiences, in other words, trump stuff. Young travelers are not “escaping” through travel as much as they’re collecting experiences and pursuing opportunities for growth.

It all adds up. U.S. Millennial travelers that we surveyed in this report indicated that participating in a Once-in-a-Lifetime Activity and Volunteering are some of the most desired future travel activities (36% and 31%, respectively). As Millennial consumers decide which meaningful, value-driven, shareable brands deserve their increasingly hard-earned money, the rubber hits the road for companies and destinations that have been listening, empowering and getting out of the way. Having read this report helps, too.
We hope you enjoyed this sample of our insight and expertise.

HERE’S HOW RESONANCE CAN HELP SHAPE THE FUTURE OF YOUR DESTINATION OR DEVELOPMENT

Place Strategy
Resonance strategies help destinations and developers understand market trends, engage their communities and plan for the future to realize the full economic potential of their destination or development.

Destination Assessments
Development Strategies
Tourism Master Plans

Place Branding
Our approach combines analytics with storytelling techniques and award-winning design to define and communicate a compelling competitive identity for a destination or development.

Brand Strategy & Storylines
Brand Identity
Brand Guidelines

Place Marketing
Our strategic and creative teams write and execute marketing and communication plans that bring the story of place to life and engage audiences all over the world to attract investment, talent, tourism and/or residents.

Strategy
Digital
Advertising
Content
Collateral
PR
You're invited to the Unveiling of the Kukui'ula Club Villas

Join Wainwright and Kukui'ula to discover the Club Villas, a spectacular new collection of single-family ocean view homes.

May 27th, 6 to 7 pm at the Club at Kukui'ula and Spa. Entertainment, Gourmet gifts and prize packages will be awarded. Prospective buyers are welcome guests.

RSVP 808 742 0234
We hope you enjoyed this *Future of U.S. Millennial Travel Report*. For detailed results and insights from this study, please contact us.

You can download a free copy of this report at ResonanceCo.com/Our-Reports.