



JAPANESE MULTI-GENERATIONAL TRAVEL TRENDS

Travel Habits and Behaviors of Generation Z, Millennials, Generation X, and Baby Boomers

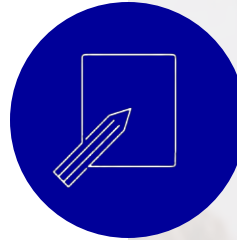
METHODOLOGY

ONLINE SURVEY



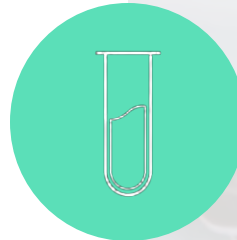
Data Collection Method

Quantitative Survey



Field Work

30 March – 7 April 2017



Sample Size | Total: n=1001

Chinese Travellers
Generation Z (n=175)
Millennials (n=276)

Generation X (n=275)
Boomers (n=275)



Generational Ages

Generation Z = 18-23
Millennials = 24-35

Generation X = 36-55
Boomers = 56+



HOW THEY TRAVEL

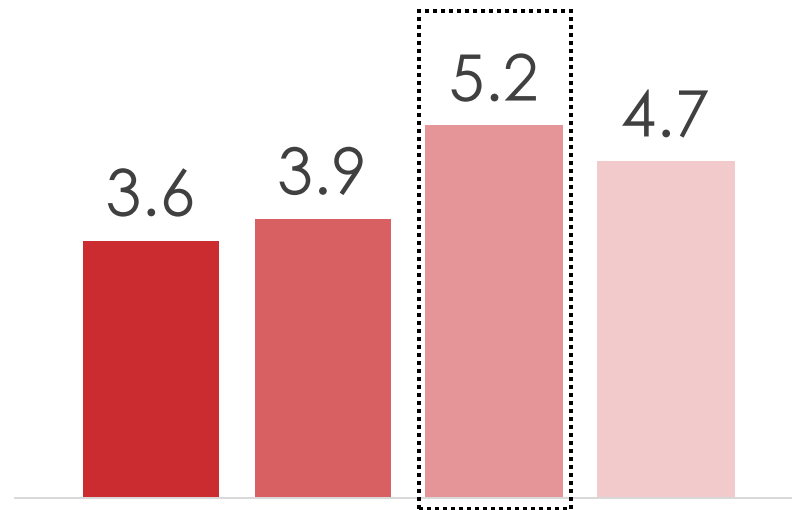


BOOMERS TAKE THE LONGEST TRIPS

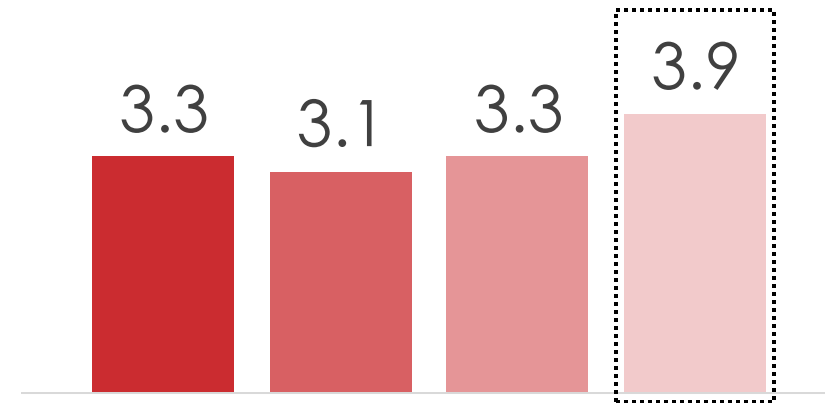
Gen X travellers take the most trips per year



Total Number of Trips Taken Per Year



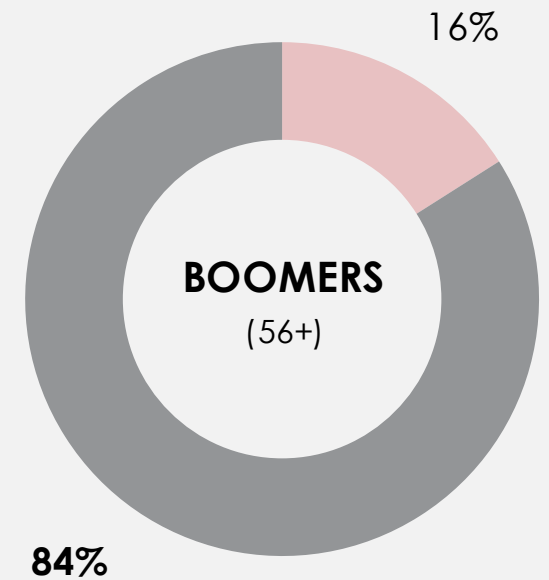
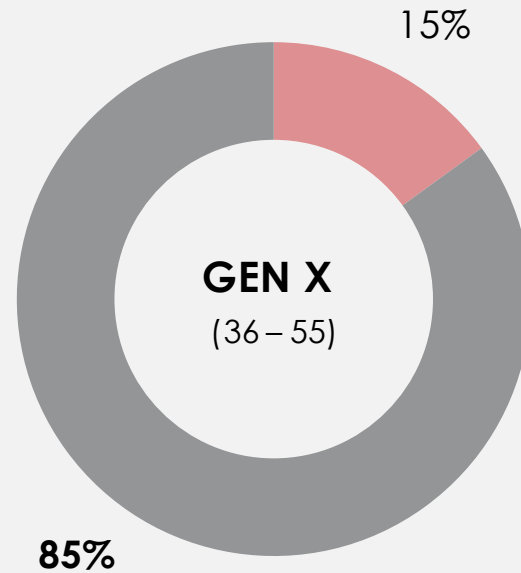
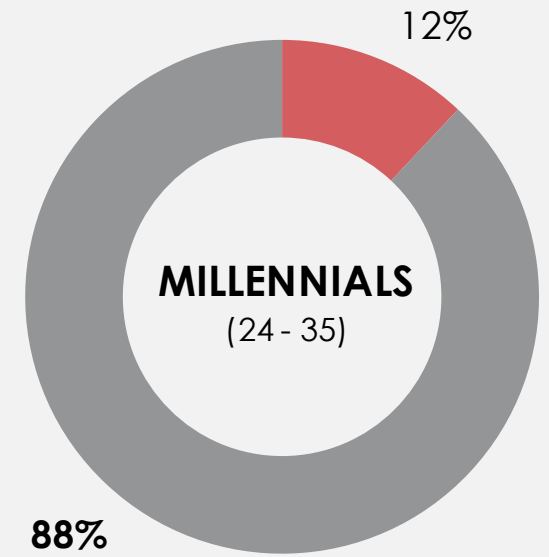
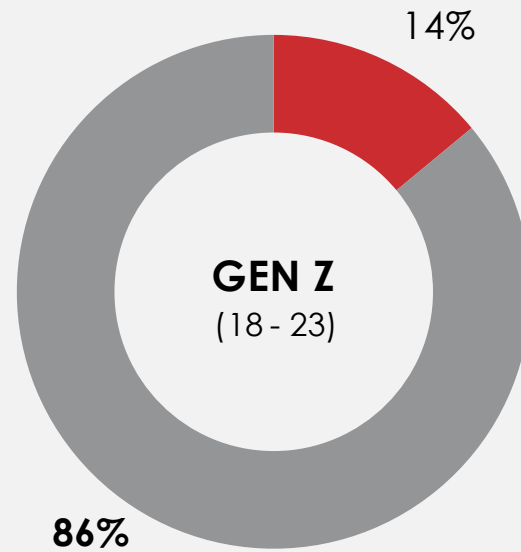
Last Vacation Duration in Days




Gen Z (18 - 23) Millennials (24 - 35) Gen X (36 - 55) Boomers (56+)

Notable Generational Difference

ALL GENERATIONS SHOW A STRONG AFFINITY TO TRAVEL DOMESTICALLY



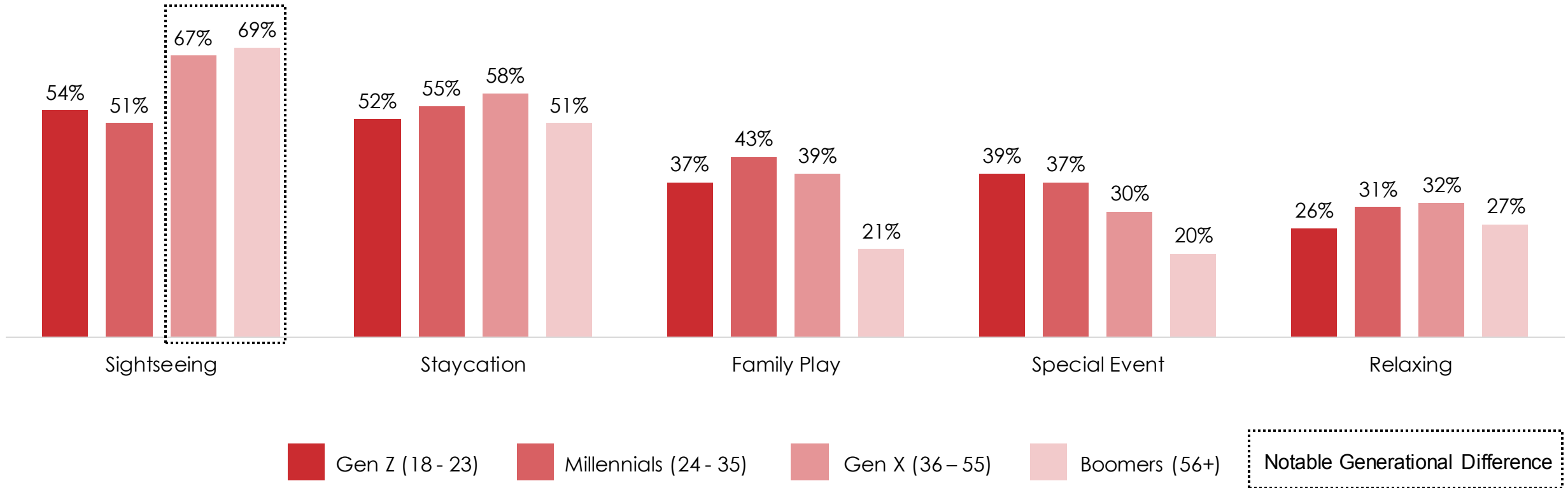
 In my country

Q14. Was the trip....?

SIGHTSEEING AND STAYCATIONS ARE TOP PRIORITIES

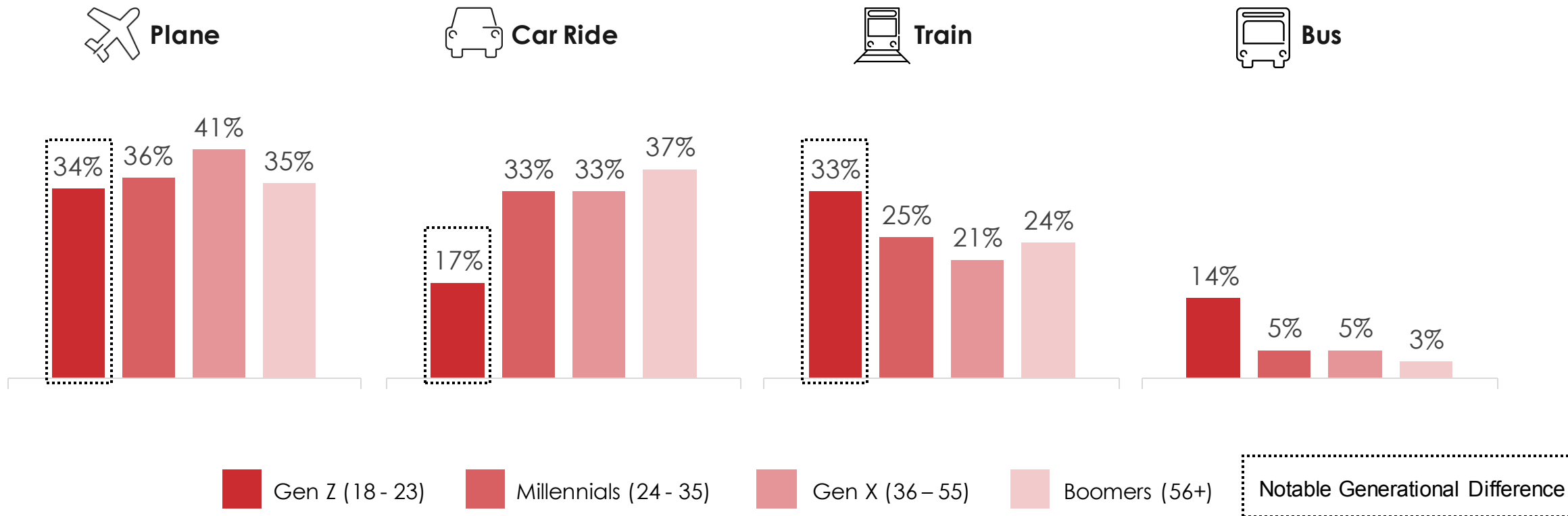


Gen X and Boomers prefer to sightsee, Millennials and Gen X rank sightseeing and staycations as nearly equal

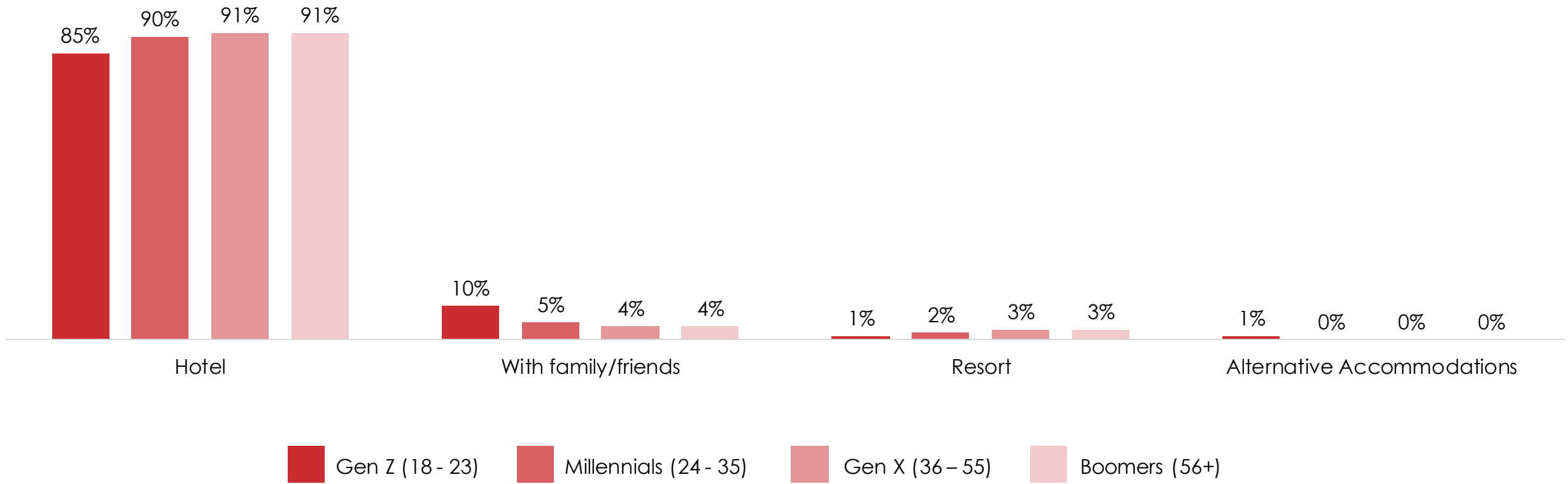


TRANSPORTATION IS FAIRLY SIMILAR ACROSS GENERATIONS

Gen Z are almost as likely to take a train as they are a plane but less likely to take a car to get to their destination



ALL GENERATIONS STRONGLY PREFER HOTEL STAYS

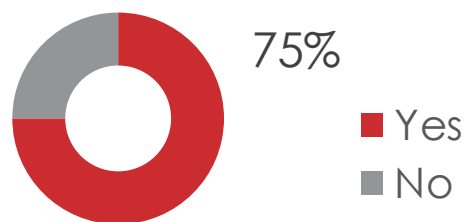


ALL GENERATIONS PRIORITIZE BUDGET

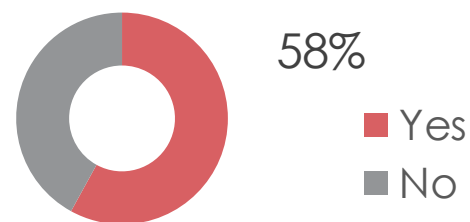
Food ranks second only to hotel in travel spending



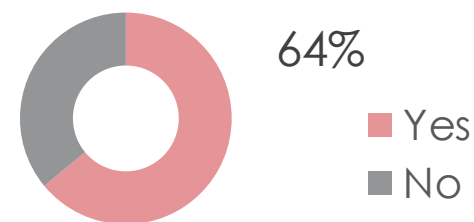
Budget a Primary Factor?



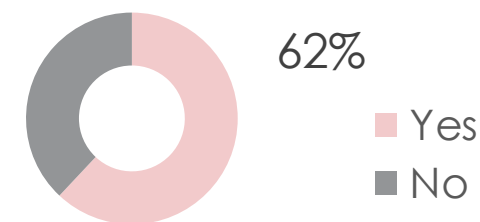
Proportion Spent On	
Hotel	27%
Food	17%
Shopping	15%
Flight	14%
Transportation	14%
Attractions	9%
Other	3%
Home sharing	1%



Proportion Spent On	
Hotel	35%
Food	18%
Flight	14%
Transportation	14%
Shopping	11%
Attractions	5%
Other	3%
Home sharing	1%



Proportion Spent on	
Hotel	36%
Food	17%
Flight	16%
Transportation	15%
Shopping	8%
Attractions	6%
Other	2%
Home sharing	0%



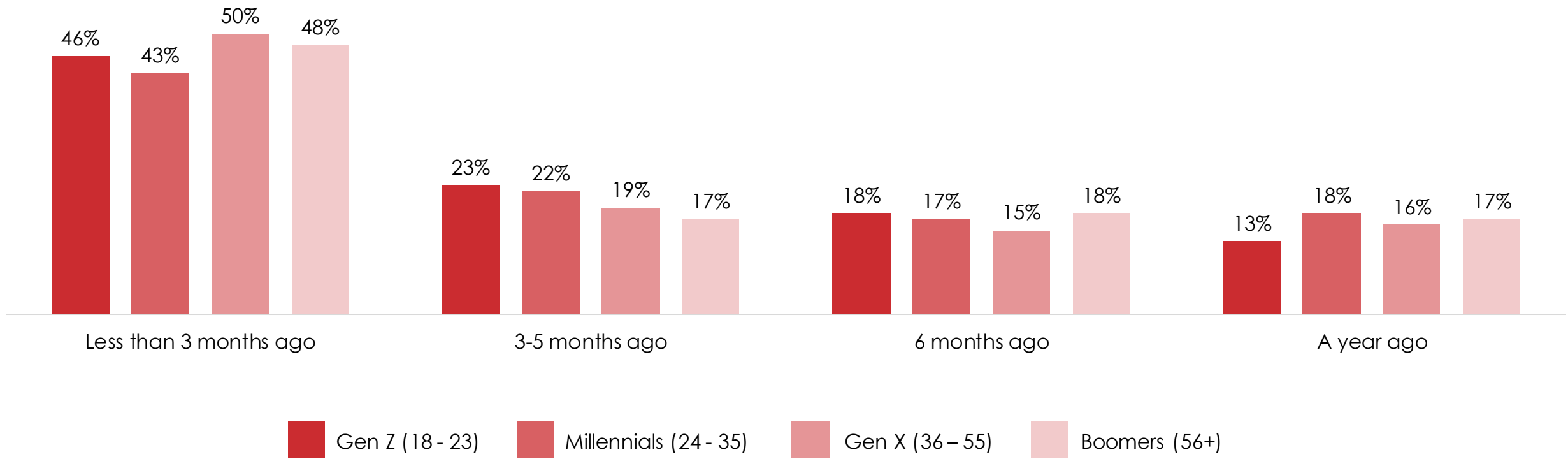
Proportion Spent on	
Hotel	36%
Food	19%
Transportation	15%
Flight	11%
Shopping	10%
Attractions	4%
Other	5%
Home sharing	1%

■ Gen Z (18 - 23)
 ■ Millennials (24 - 35)
 ■ Gen X (36 - 55)
 ■ Boomers (56+)

YOUNGER GENERATIONS BOOKED VACATION MOST RECENTLY



Last Time Booked Travel





TRAVELLER ATTITUDES AND INFLUENCES

NEARLY TWO-THIRDS OF ALL GENERATIONS ARE DECIDING BETWEEN MULTIPLE DESTINATIONS



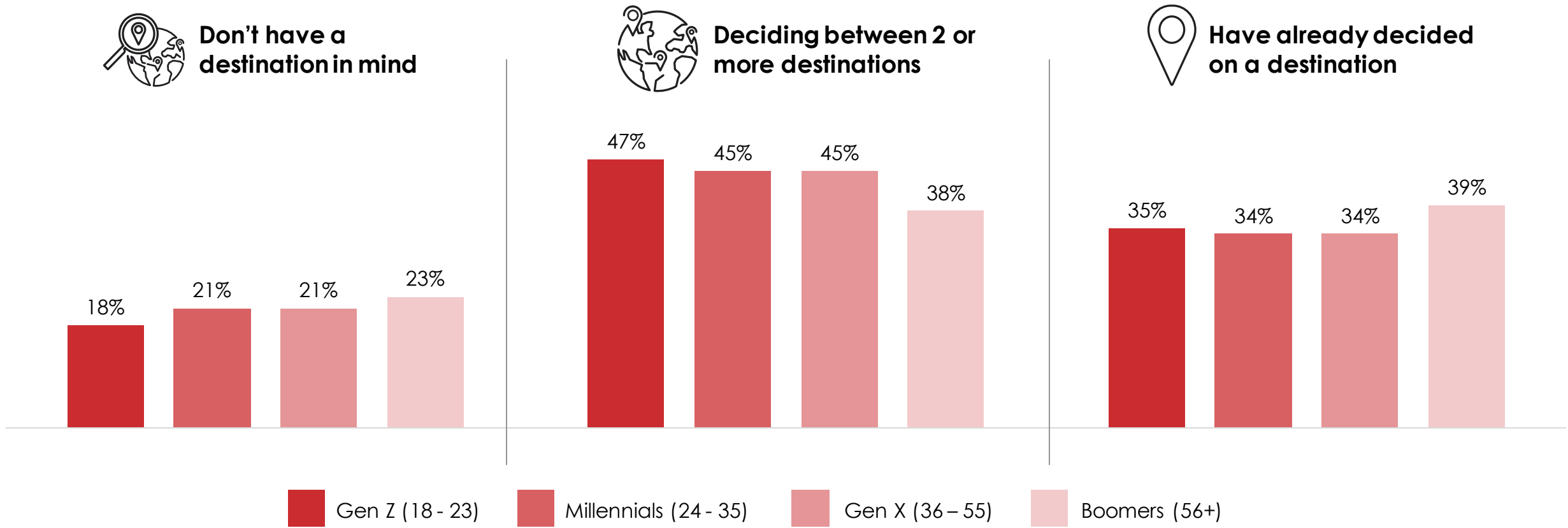
Don't have a destination in mind



Deciding between 2 or more destinations

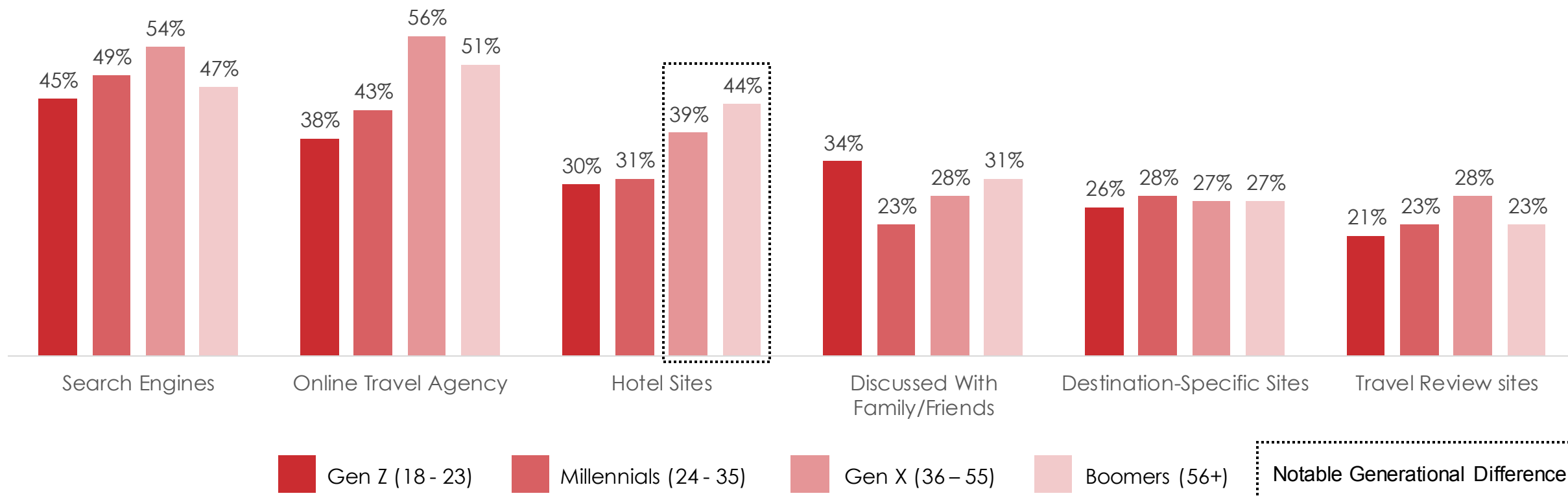


Have already decided on a destination

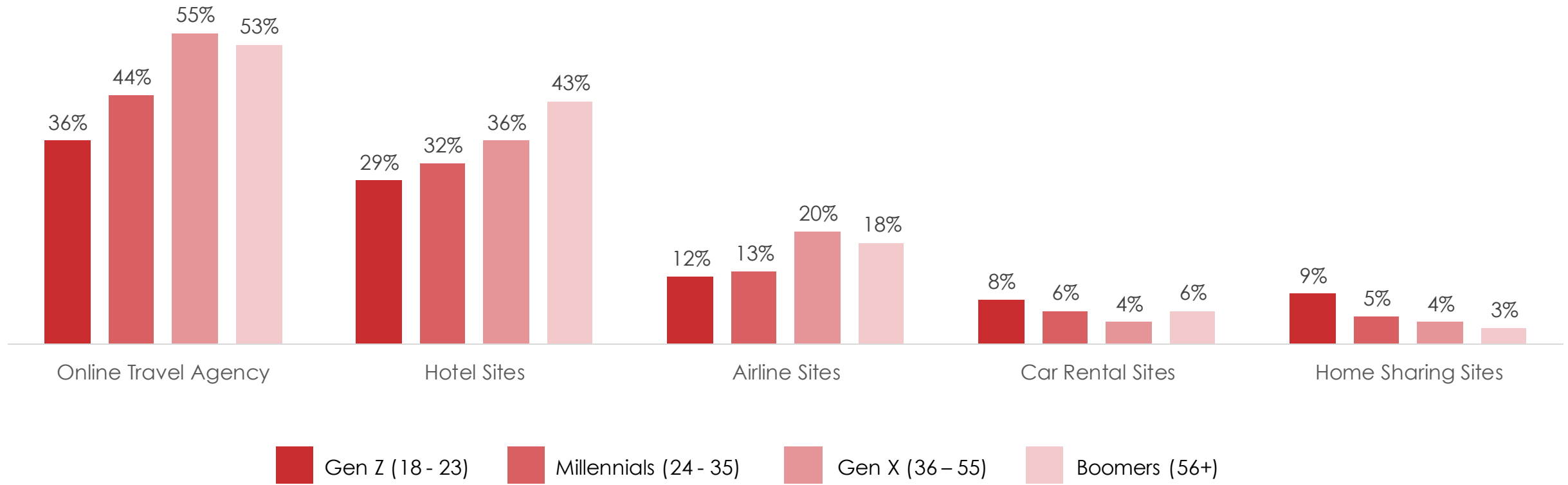


OTAs AND SEARCH ENGINES ARE LEADING PLANNING RESOURCES

Gen X and Boomers also look to Hotel sites to plan their trip

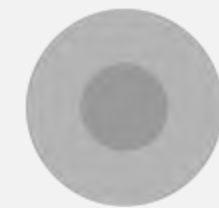


OTAs CONVERT THE MOST TRAVELLERS ACROSS GENERATIONS

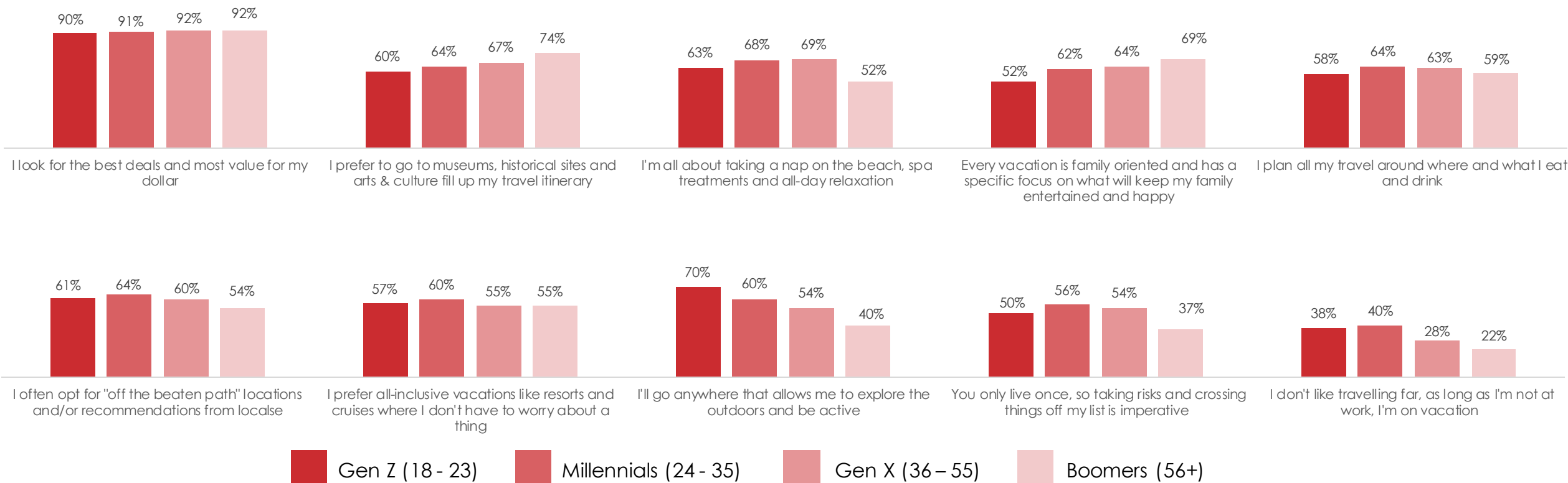


VALUE AND CULTURAL SITES DRIVE TRAVELLER SENTIMENT

Relaxing trips also rank high for Japanese travellers

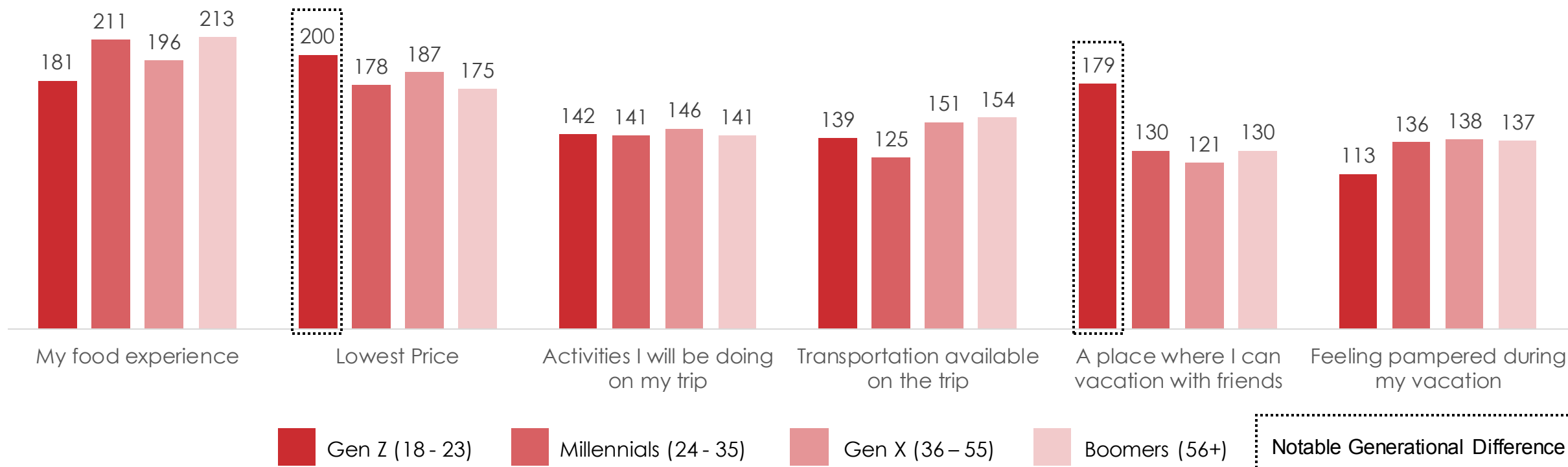


Percent of Travelers Who Somewhat Agree/Strongly Agree With The Statement

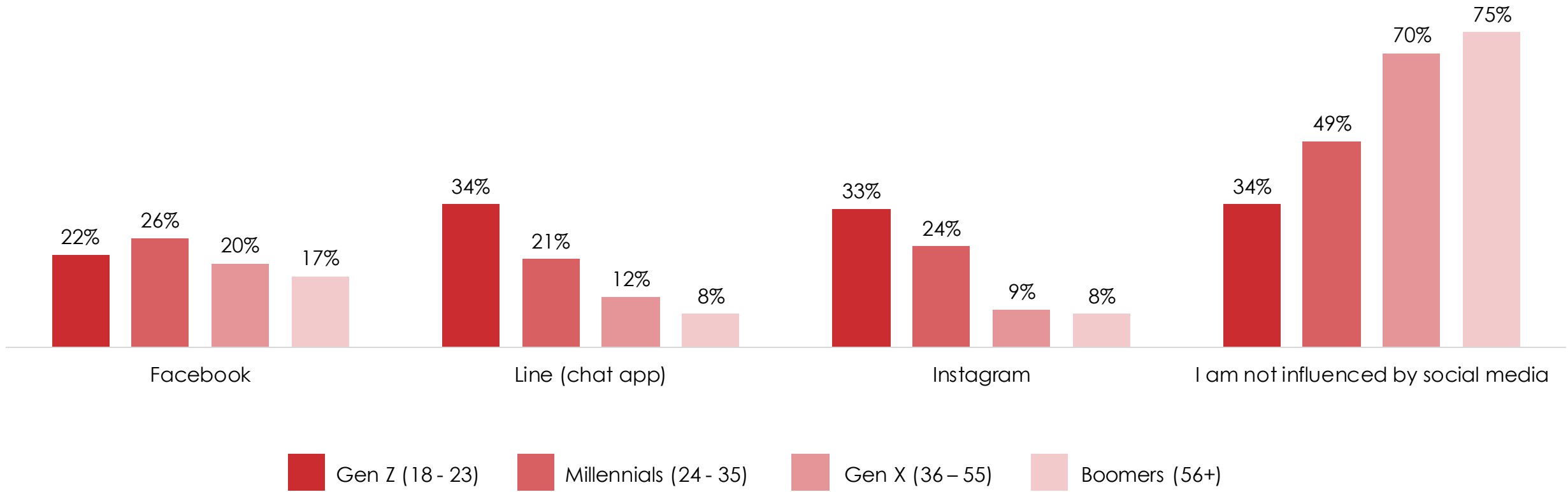


FOOD, LOWEST PRICE, AND ACTIVITIES INFLUENCE JAPANESE TRAVELLER DECISIONS

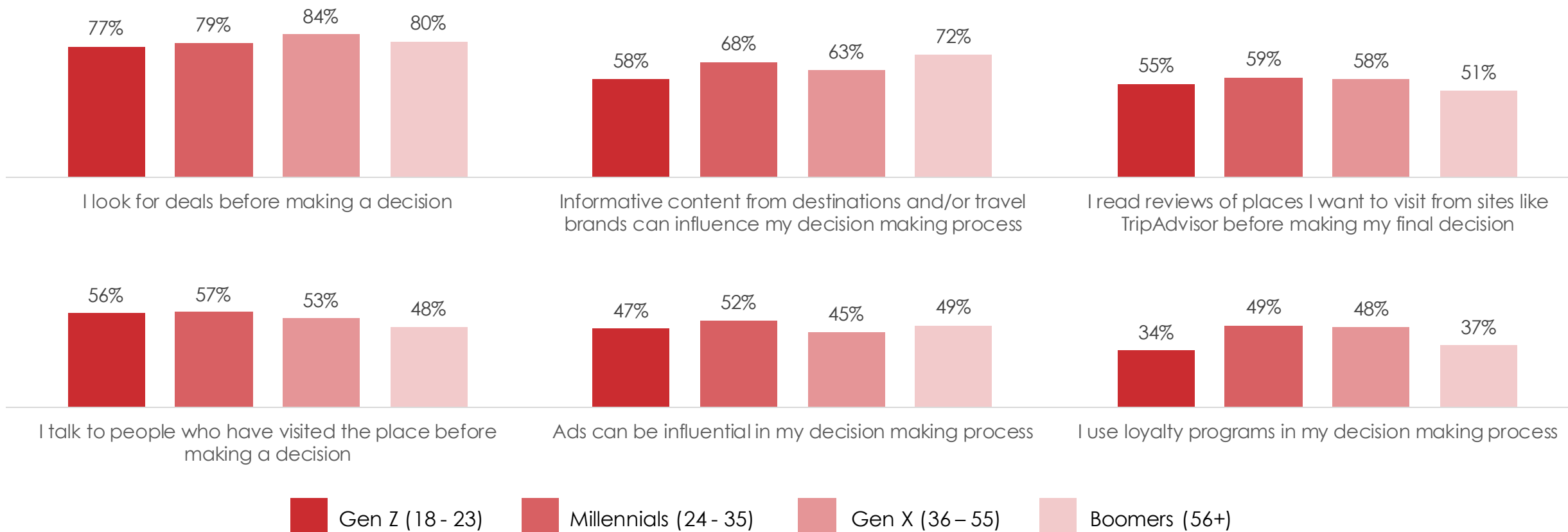
Gen Z look for lowest price and places to vacation with friends



OLDER GENERATIONS SAY THEY ARE NOT INFLUENCED BY SOCIAL MEDIA

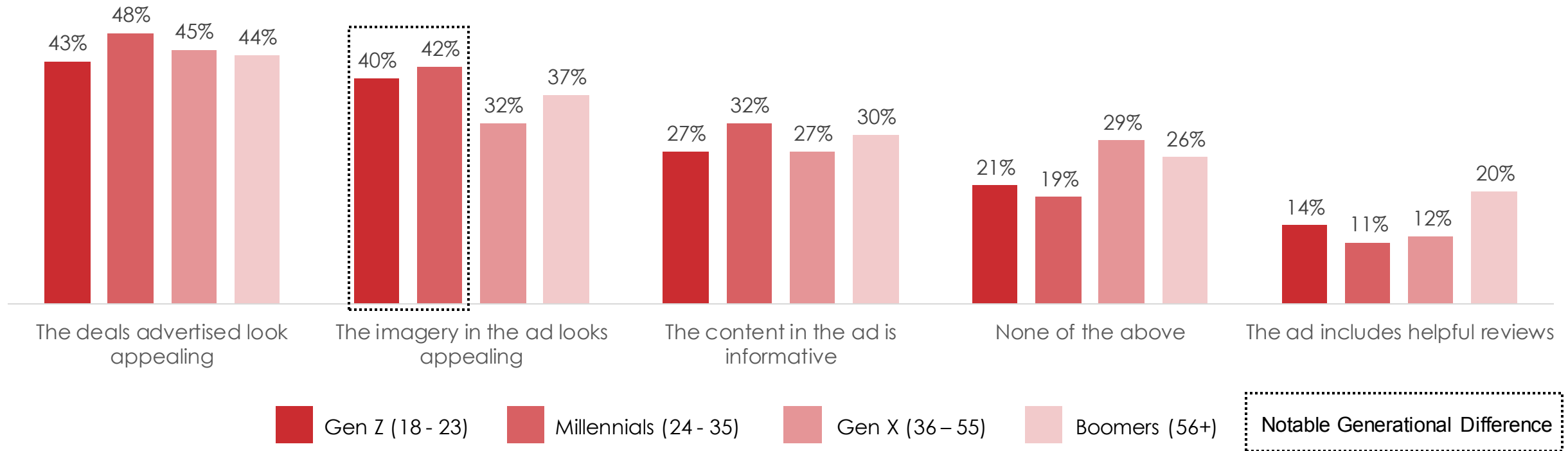


DEALS, INFORMATIVE CONTENT FROM DESTINATIONS, AND REVIEWS CAN HELP TRAVELLERS CONVERT



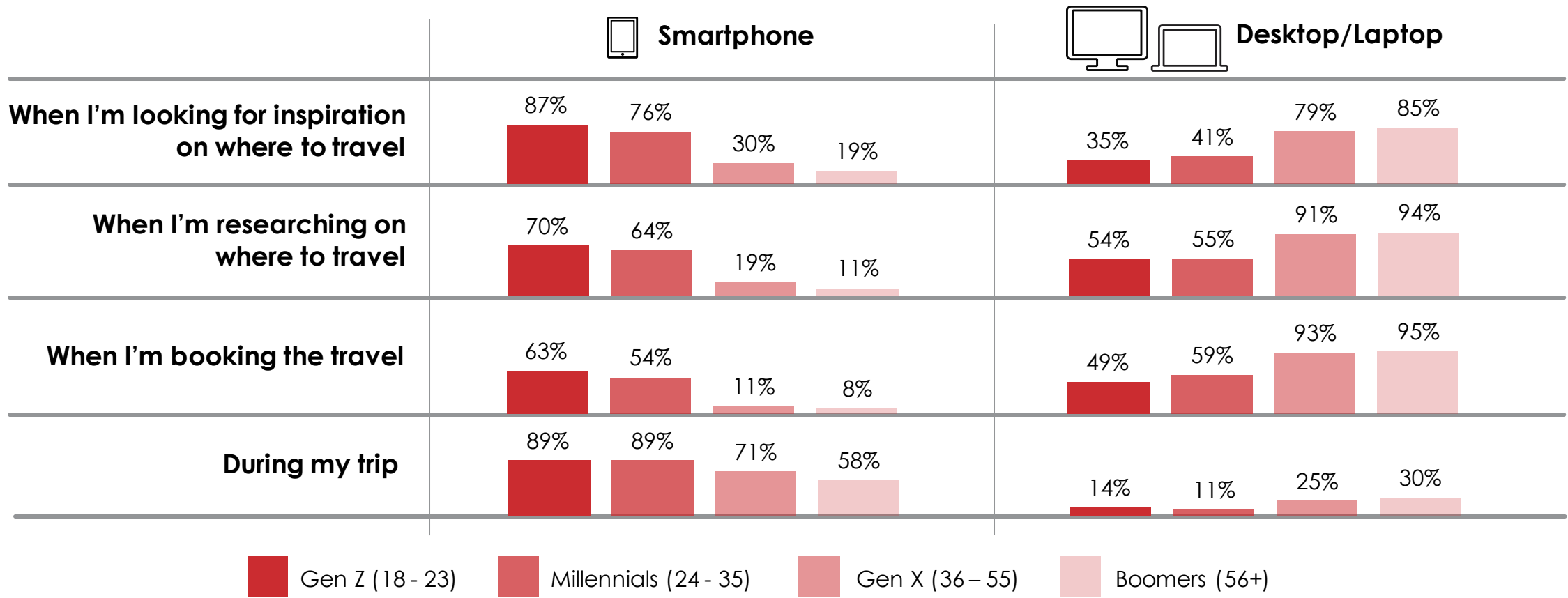
ALL GENERATIONS MOST INFLUENCED BY DEALS IN ADVERTISING

Younger generations also driven by appealing imagery in ads



ALL GENERATIONS USE SMARTPHONES IN TRIP

Younger generations use smartphones at all stages of their trip while Boomers switch to smartphones in-trip



KEY INSIGHTS FOR JAPANESE GENERATIONS

Gen Z

Gen Z are open to destination inspiration, as 40 percent are deciding between two or more destinations. And when it comes to destinations, 70 percent said they'll go anywhere that allows them to explore the outdoors and be active, while 63 percent live for all-day relaxation, napping on the beach, and spa treatments.

When prioritizing, Gen Z also look for a place where they can vacation with friends and allocate 15 percent of their budget to shopping, which is higher than any other generation.

Gen X

Gen X are travelling an average of 17 days per year, and more than half (55 percent) book their travel on an OTA. Two-thirds said informative content from destination and travel brands can influence them.

When it comes to budget prioritization, they allocate more than one-third of their budget for a hotel with food following at 17 percent.

Millennials

Millennials, on average, only travel 12 days per year, and when they do travel, prefer staycations, sightseeing or family play trips.

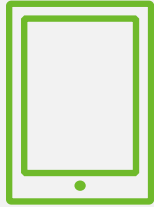
More than one third of them said budget is not a factor when deciding a trip. However, when it comes to budget, they allocate 18 percent of it to food. In fact, 64 percent of Millennials plan travel around food and drink, and prefer to fill their itinerary with museums, historical sites, and arts and culture.

Boomers

Baby Boomers travel 18 days a year and 16 percent travel internationally, both more than any other generation. And regardless of location or length, they like to fill their travel itinerary with museums, historical sites, and arts and culture—with nearly 70 percent saying every vacation is family oriented.

Boomers allocate 19 percent of their budgets to food and said budget was not a primary factor for booking a trip.

KEY TAKEAWAYS



Smartphone-Savvy Gen Z Travellers Prioritize Food, Friends, Shopping and Activities



Food-Focused Millennials Prefer Relaxation, Staycations, Sightseeing and Family Play; Less Tied to Budget



Deal-Seeking Gen X Enjoy Sightseeing and Staycations with Relaxation, Historical Sites, Arts and Culture



Baby Boomers Opt for Museums and Culture-Rich Sightseeing Trips and Staycations, Prioritize Food and Low Prices



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