

The Art & Science of Destinations™

DESTINOLOGY™

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Meet the Millennials

Insights for Destinations

A National Research Project

Meet the Millennials: Insights for Destinations

Every generation experiences the world in a different way, developing attributes that uniquely reflect who they are. The group aged 18 to 29, grew into adulthood at the beginning of a new millennium. Impacted by significant global trends including the explosion of technology, this group has three distinguishing features:

Millennials are the most diverse generation ever born in the United States; they are becoming the most educated generation in American history; and they are easily the most connected generation of all time.
(Pew Research Center, "Millennials – A Portrait of Generation Next," February 2010)

Millennials provide the perfect challenge for a PGAV Destinations research project—to gain insights into what makes these travelers tick. A nationwide online survey was launched to compare a Millennial sample group with attractions visitors aged 30 and over. This study, jointly commissioned by Delaware North Companies Parks and Resorts and PGAV Destinations, was performed by Jerry Henry and Associates. Drawing 771 respondents from across the United States, the study has a margin of error of +/- 3% and a 95% confidence interval.





Q&A with Kevin Kelly

President, Delaware North Parks & Resorts
www.experiencednc.com

Why is this research important to Delaware North Parks & Resorts?

Our mission is to provide stewardship and hospitality in Special Places, dedicated to creating memorable guest experiences as unique as the destination. In support of this mission, we have core values to be Stewards of the Environment, Stewards of Interpretation and Education, and Stewards of Historic Structures and Artifacts.

As operators in Special Places, we take a very customer-centered, data-driven approach to how we run our business. Ongoing research is at the core of this philosophy.

Why are Millennials important?

Millennials represent not only a powerful segment of today's traveler, but their preferences and habits will help shape the future of travel preferences going forward. Therefore, it is important to us that we understand these nuances not only for today, but with an eye to the future as well.

Many of our clients are also focused on this demographic as they look for ways to be relevant to this age group.

This is such a fascinating group. Millennials are more ethnically and racially diverse, and more educated, than any other previous generation. This creates a great opportunity for many of our clients, such as NPS and NASA, who are looking for ways to be more relevant to both younger audiences and more ethnically diverse audiences. Millennials can be a gateway for both objectives.

How will you apply the findings of this research?

It is exciting and encouraging to see that Millennials place strong preference for those elements that are core values for Parks & Resorts such as the Environment and Education (importance of learning something new). Now the focus must be on delivering on these values in ways that are meaningful and appropriate to Millennials.

What role will technology play?

Clearly, we must take their preferences for technology into account, particularly as we "Tell the Story" of the Special Places both to entice their visitation as well as engage them during their stay.

Focusing on mobile and social networks as information and booking channels changes a lot about the typical ways of doing business, and it is a big part of where we are putting our efforts.

Are there particular implications for your lodging properties?

On the "Hospitality" side of our business, this information impacts our decisions on the type of services and amenities we offer, including the room décor, food & beverage offerings, and technology offerings. Travel parties are clearly different with Millennials, so rethinking how we package and price is a consideration, too.



1

Millennials are All About Relationships.

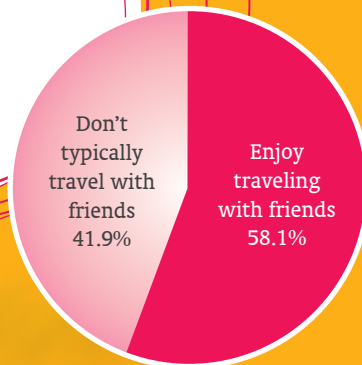
Ethnically and racially diverse, and with many from non-traditional families, they are indeed family-oriented. In fact, over 42% of Millennials nationwide who have visited attractions in the past three years have children in their households. Millennials are also more likely to travel with friends or to places friends have visited. The female heads of household are clearly the decision makers, more so than in other age group. They are well traveled, sophisticated, self-aware, and seek places with play areas for the kids.

Perhaps most importantly, Millennials are highly influenced by friends and family in selecting places to visit. Two-thirds of them will visit places recommended by family and friends – significantly more than their older counterparts. Using social media, this recommendation often comes in the form of real-time descriptions of the experience.

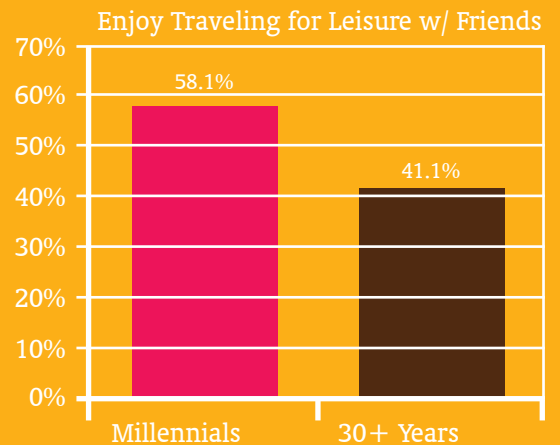
Implication: Destinations need to accommodate Millennials' need to broadcast their experiences – don't ignore the digital networks!

Millennials Enjoy Traveling with Friends

Nearly six in ten Millennials (58%) say they enjoy traveling for leisure with their friends—nearly 20 points higher than older generations.



Millennials



*Having a story to tell is important!
Millennials stay in constant communication,
and the need to share amusing and enlightening
tidbits is paramount to their social currency.*

2

Millennials are Savvy.

Their use of technology dominates everything. Cell phones function as appendages, and Millennials' ability with the Internet is only exceeded by their texting dexterity. According to the Pew Study, 83% of them sleep with their cell phones! In general, they make quicker travel decisions with a shorter planning cycle. Always online for information, they search for a deal, read the reviews, book it and go. The average amount of time it took to plan their last trip was only 75 days; that's about 20% less than the amount of time it took the older generations to plan trips.

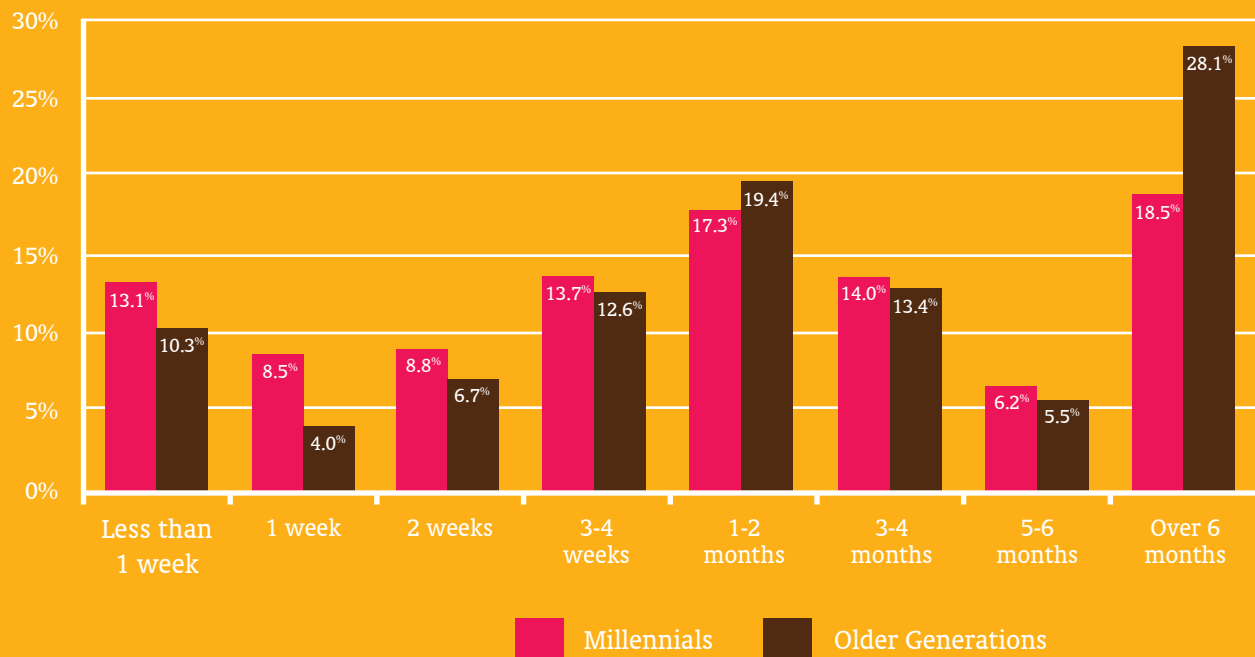
In constant contact with family and friends, Millennials are on a quest for fun and interesting things to report about their experiences. Tidbits are ideal for a flow of Tweets or Texts, and once back home, they quickly post favorite photos on their Facebook page.

Implication: Take a look at your messaging to insure it is easy to follow, timely and relevant. Be innovative in creating those memorable moments, which you can bet will be shared.

Be Cutting Edge.

Planning Time Required

Millennials plan trips in far less time (75 days) than older generations (93 days).



3

An Appetite for Learning.

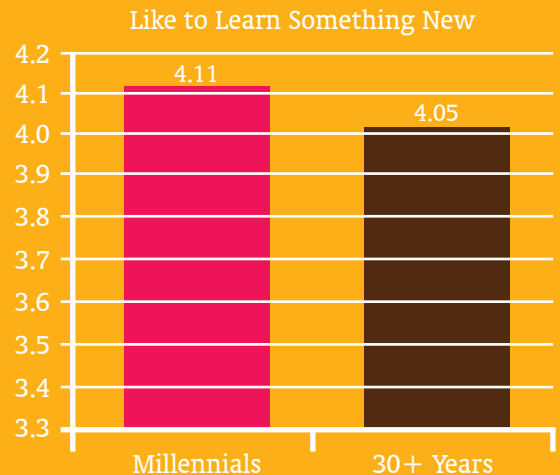
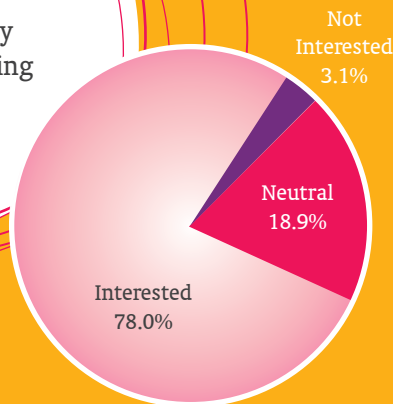
Millennials know a lot. According to the Pew Study, Millennials are more highly educated than other generations at comparable ages. More than half of them (54%) have at least some college education during the ages 18-28, as compared to 49% of Gen Xers and 36% of Baby Boomers. Their knowledge ties to an expectation for real and authentic experiences. In 2009, PGAV Destinations explored the “Authenticity Opportunity,” finding that 80% of attractions visitors like to visit places that feature authentic elements. While authenticity was defined in different ways, the theme was for attractions to offer less commercialism and more personally meaningful experiences.

Seventy-eight percent (78%) of Millennials stated a strong preference for learning something new when they travel. However, they also showed a keen sense for the types of learning experiences they wish to have. Millennials’ stated clear preferences for experiences that are fun and entertaining (78%), immersive (70%), and interactive and hands-on (68%). And in all of these categories, they showed a markedly stronger preference than their older counterparts.

Implication: Not surprisingly, this diverse group wants to learn something new and exhibits a variety of learning styles. Passive experiences will not appeal to Millennials. *Use immersive, interactive and entertaining tactics.*

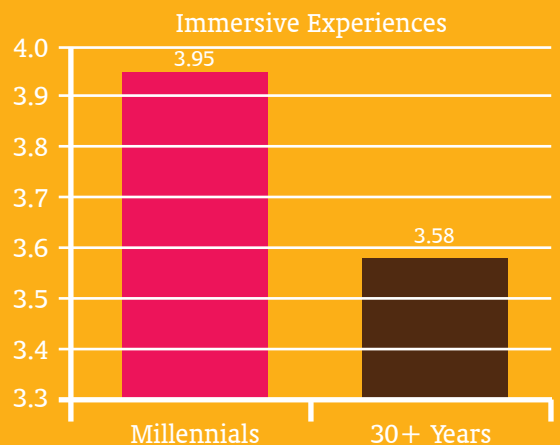
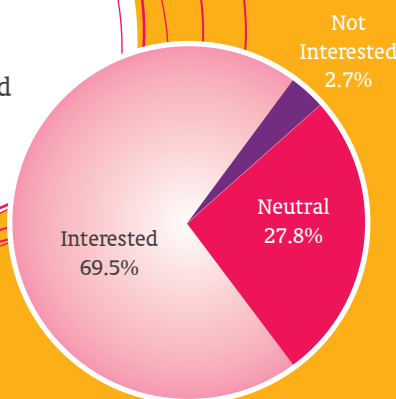
I Like to Learn Something New When I Travel

Nearly four in five Millennials (78%) say they are interested in learning something new when they travel. Based upon their ratings, their interest in learning something new is stronger than that of other generations.



Immersive Experiences

Seven in ten Millennials say they expect Special Places to offer immersive experiences. They rate the appeal of immersive experiences at 3.95 compared to 3.58 from older generations.



4 Millennials are Good Citizens.

For Millennials, learning is not a passive activity – it is participatory, immersive, and fun. Anything short of this is simply not relevant.

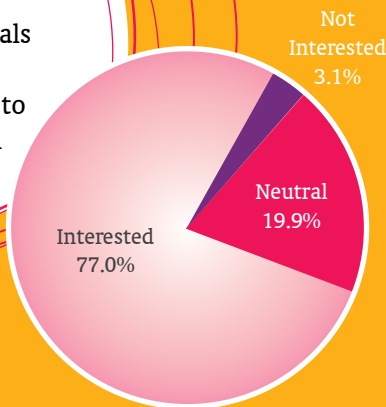
Involved and volunteering in their communities, Millennials exhibit a genuine concern for people and the environment. As gleaned from the 2009 PGAV Destinations survey “Survival of the Greenest,” this age group is single-handedly fueling the Green trend. Millennials care about environmental issues, expecting attractions to demonstrate a commitment to sustainable practices.

Millennials represent a significant societal change in the desire of travelers to incorporate volunteerism and sustainable practices in destinations.

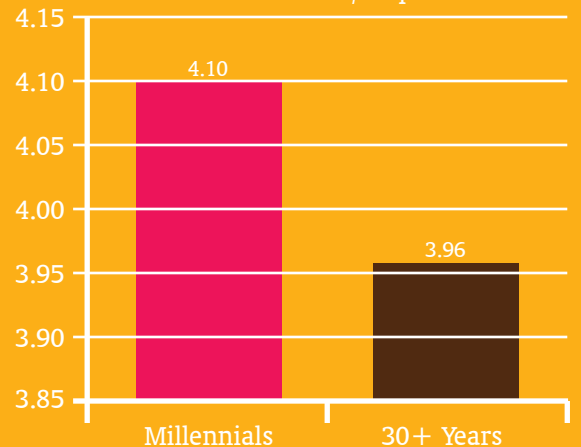
Implication: Millennials are not your traditional guests. They do not take leisure trips “just because,” but are looking for something that resonates with their need to make a difference.

Believe It Is Essential to Connect with Causes

Over three-quarters (77%) of Millennials say they believe it is essential to connect to causes that are important to them, a trait more important to them than it is to older generations.

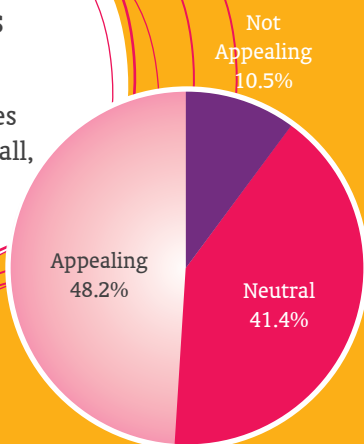


Essential to Connect w/ Important Causes

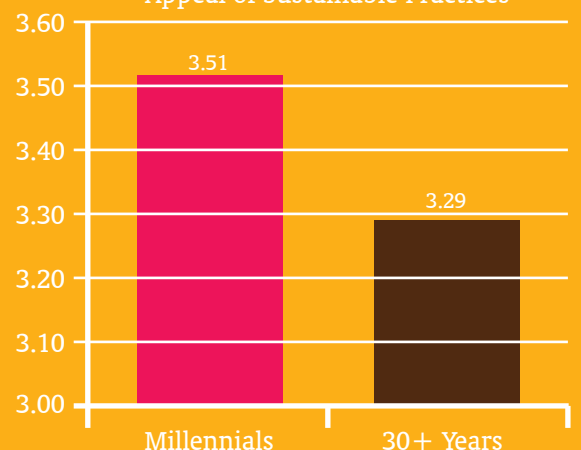


Appealing for Special Place to Pursue Sustainable Practices

Nearly half of Millennials say it is appealing to them when special places engage in sustainable practices. Overall, they rate this practice as being much more appealing than those older.



Appeal of Sustainable Practices



Destinology is produced by PGAV Destinations, a firm providing growth solutions to cultural, natural, and entertainment destinations worldwide. Learn more about us at www.pgavdestinations.com.



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Millennials are All About Relationships.
 Millennials are the most socially connected generation in American history. They are more likely than any other generation to have a close friend or family member who lives in another state. Millennials are also more likely to have a friend or family member who lives in another country. Millennials are also more likely to have a friend or family member who lives in another country.

Millennials Enjoy Traveling with Friends.
 Millennials are more likely than any other generation to travel with friends. Millennials are also more likely to travel with friends than with family or alone. Millennials are also more likely to travel with friends than with family or alone.

Millennials are Savvy.
 Millennials are more likely than any other generation to use a laptop or tablet computer. Millennials are also more likely to use a laptop or tablet computer than a desktop computer. Millennials are also more likely to use a laptop or tablet computer than a desktop computer.

Appetite for Learning.
 Millennials are more likely than any other generation to read a book for pleasure. Millennials are also more likely to read a book for pleasure than for school or work. Millennials are also more likely to read a book for pleasure than for school or work.

Millennials are Good Citizens.
 Millennials are more likely than any other generation to volunteer. Millennials are also more likely to volunteer than to donate money. Millennials are also more likely to volunteer than to donate money.

Millennials are More Likely to Spend Money at Special Places.
 Millennials are more likely than any other generation to spend money at special places. Millennials are also more likely to spend money at special places than at regular places. Millennials are also more likely to spend money at special places than at regular places.

To download a PDF of PGAV Destinations' nationwide study on the Next Great Travel Generation with additional charts and information, visit our website at www.pgavdestinations.com/insights/.