

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

In addition, trips are getting shorter and more spread out across the holiday season, forcing a reconsideration in the way travel providers should approach their cycle of ad spending.

- There's a reticence to travel over the holidays
- Some holiday travelers travel because they have to
- Parents are at the mercy of two schedules



"Seven in 10 Americans travel during the summer or winter holidays. These trips have varied methods and motivations, whether it is a family piling into the car to visit Grandma at Christmas or married retirees taking a long summer vacation to Hawaii. However, travelers' attitudes around how they spend their time and money on vacation are changing."

 Mike Gallinari, Travel & Leisure Analyst

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Table of Contents

OVERVIEW

- What you need to know
- Definitions

EXECUTIVE SUMMARY

- Overview
- The issues
- There's a reticence to travel over the holidays

Figure 1: Sentiment about holiday travel, by generation, February 2019

Some holiday travelers travel because they have to

Figure 2: Obligatory Traveler demographics, February 2019

· Parents are at the mercy of two schedules

Figure 3: Share of households with children, by age group of children, November 2018

- The opportunities
- Two peaks of seasonal travel

Figure 4: Length of trip, by season, February 2019

· Activities are central to vacation enjoyment

Figure 5: Opinions of holiday travel, by number of activities done, February 2019

Summer travelers tend to be older

Figure 6: Summer trip length, by generation and parental status, February 2019

What it means

THE MARKET - WHAT YOU NEED TO KNOW

- Slowing macroeconomic factors can limit travel
- Work and school schedules dictate vacations
- · Employees angling for more time off
- Most Americans are already close to home
- Per-vacation spending has increased

MARKET FACTORS

GDP healthy, but stagnation is on the horizon
Figure 7: GDP change from previous period, Q1 2007-Q4
2018

DPI increases, but may face headwinds into summer

Figure 8: Disposable personal income change from previous period, January 2014-January 2019

• Fuel prices remain relatively stable

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Figure 9: US gasoline and diesel retail prices, January 2007–March 2019

· High employment dictates travel times

Figure 10: Unemployment and underemployment, January 2007-February 2019

MARKET PERSPECTIVE

- · Vacations are getting shorter, more frequent
- · Per vacation spending high

Figure 11: Spending on domestic vacations, 2014-18

One third of households are bound by school rules

Figure 12: Share of households with children, by age group of children, November 2018

- Workers want more time off
- Out the driveway and down the street to mother's house we go

INDUSTRY TRENDS - WHAT YOU NEED TO KNOW

- Multigenerational travel provides a way for families to get together
- Seeking tidings of comfort and joy
- Travel supplier creatives are on trend . . .
- ... but timing could be better

HOLIDAY TRAVEL TRENDS

- Multigenerational travel remains a strong trend
- Friendsgiving
- Hygge put in its place by pyt

Figure 14: VisitDenmark's "Hygge" page, April 2019

Figure 15: Pandora "Sound On," December 2018-January 2019

New LCC provides XTRA options outside of cities

HOLIDAY TRAVEL CREATIVES

Norwegian lets travelers customize their discount package
Figure 16: Norwegian Cruise Line direct mailer, December
2018

Disney has a smart local focus

Figure 17: Disney holiday email, November 2018

Southwest encourages flying for more holidays

Figure 18: Southwest Airlines Obscure Holiday email, April 2019

Wisconsin leans into good feelings

Figure 19: Travel Wisconsin, "Gemütlichkeit: The Spirit of Wisconsin," March 2018

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



DIGITAL AD SPENDING

- Spending by industry should reflect year-round travel
- Airlines
- Hotels
- OTAs

Figure 20: Monthly digital ad spend of airlines, January-December 2018

Figure 21: Monthly spend of hotels, January-December 2018 Figure 22: Monthly spend of OTAs, January-December 2018

THE CONSUMER - WHAT YOU NEED TO KNOW

- · Summer vacations aren't for the young
- · Changing peak cycles
- · One fifth of holiday travelers feel their trips are required
- Hotels rule the holidays
- Holidays are traffic jam sessions
- Activities are connected to fulfillment
- People like (but dread) holiday travel

TRAVELER SEGMENT: THE OBLIGATORY TRAVELER

Demographics of Obligatory Travelers

Figure 23: Obligatory Traveler demographics, February 2019

General sentiments of Obligatory Travelers

Figure 24: Attitudes toward holiday travel, Obligatory Travelers vs all, February 2019

TIMING OF HOLIDAY VACATIONS

Summer and Christmas are the most common holiday trips
Figure 25: Occasions for holiday travel, February 2019

Different lengths for different seasons

Figure 26: Holiday trips by length and season, February 2019 Figure 27: Length of trip, by holiday, February 2019

- Twilight travelers own summer vacation
- Millennials least likely to take long summer trips

Figure 28: Summer trip length, by generation and parental status, February 2019

Obligatory Travelers try to get out of Dodge

Figure 29: Length of trip, all holiday travelers vs Obligatory Travelers, by season, February 2019

WHERE HOLIDAY TRAVELERS STAY

- Hotels are still the accommodation of choice
- Still, travelers are open to other options

Figure 30: Outside Together $^{\text{TM}}$, May 2018

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Figure 31: Holiday lodging, February 2019

Airbnb can't beat free

Figure 32: Holiday lodging – Select items, by age, February 2019

Homeshares offer parents space

Figure 33: Holiday lodging – Select items, by parental status, February 2019

· Summer is for hotels, winter is for family

Figure 34: Lodging used for summer and fall/winter travel, February 2019

Obligatory Travelers try various lodging

Figure 35: Lodging used for holiday travel, all holiday travelers vs Obligatory Travelers, February 2019

HOW PEOPLE TRAVEL OVER THE HOLIDAYS

Most use a personal vehicle

Figure 36: Types of transportation used for holiday travel, February 2019

• Is "rail and hail" the future?

Figure 37: Types of transportation used for holiday travel, by generation, February 2019

Urbanites have travel options, rural dwellers rely on own vehicles

Figure 38: Types of transportation used for holiday travel, by residential area, February 2019

Rural fliers may take off, but fly low

Figure 39: Travel habits and sentiment, by area, February 2019

Black travelers more likely to rent cars

Figure 40: Types of transportation used for holiday travel, by race and Hispanic origin, February 2019

HOLIDAY TRAVEL COMPANIONS

· Holidays are family time

Figure 42: Holiday travel companions, by generation, February 2019

· Couples retreats fall in the summer season

Figure 45: Holiday travel companions, by season, February 2019

HOLIDAY TRAVEL ACTIVITIES

 Family visits are an integral part of the holiday travel experience

Figure 44: Activities done during holiday travel, February 2019

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
Americas China	+1 (312) 943 5250 +86 (21) 6032 7300

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Fall and winter trips could use an activity boost

Figure 45: Activities done during holiday travel, by season, February 2019

The family that stays together, plays together

Figure 46: Holiday travel accommodations, by number of activities, February 2019

Activities are connected to fulfillment

Figure 47: Opinions of holiday travel, by number of activities done, February 2019

Do stuff!

Figure 48: Opinion of holiday travel as an obligation, by number of activities done, February 2019

HOLIDAY TRAVEL ATTITUDES

· Holiday travel is generally positive

Figure 49: Sentiment about holiday travel, by generation, February 2019

· People want to travel for the holidays, but dread it

Figure 50: Sentiment about holiday travel, by generation, February 2019

Travelers generally prefer their "own" vacations

Figure 51: Sentiment around visiting relatives, by generation and Millennial parent status, February 2019

· Family visits become less appealing as children age

Figure 52: Attitudes toward visiting relatives, by age of children, February 2019

APPENDIX - DATA SOURCES AND ABBREVIATIONS

- Data sources
- Consumer survey data
- Direct marketing creative
- Abbreviations and terms
- Abbreviations
- Terms

APPENDIX - THE CONSUMER

Figure 53: Spending on domestic vacations, 2014-18

Figure 54: Family households, by age of own children, 2018

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why.** As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit mintel.com.