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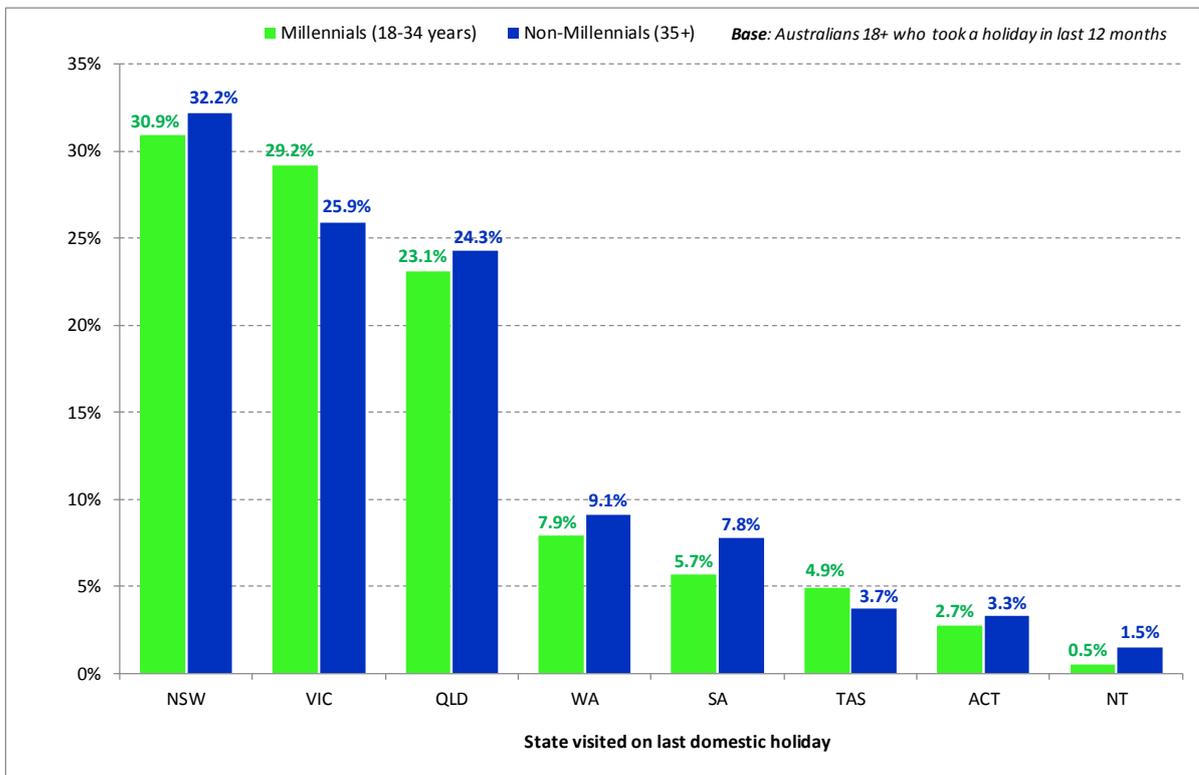
Same same but different: the holiday habits of Millennials

Baby Boomers may still be boasting about the fun they had in the 1960s, and Generation X-ers may have finally shaken off their slacker image, but Millennials (aged 18-34 years*) are the generation on everyone's lips these days. The tourism industry is no exception, with Millennial travel trends currently a hot topic. But are Millennial holiday-goers really so different from everyone else? It all depends on what you're comparing, the latest findings from Roy Morgan Research show.

Between April 2015 and March 2016, 69.0% of Millennials reported taking at least one holiday in the preceding 12 months, marginally behind 70.7% of Australians 35+ (who, for the sake of convenience, we'll call non-Millennials).

Despite the relatively similar proportions of total holiday-goers, Millennials (16.4%) were noticeably more likely than non-Millennials (12.6%) to have taken their last holiday overseas. Conversely, a higher proportion of non-Millennials (56.3%) than Millennials (51.2%) took their last holiday within Australia. As the chart below shows, Victoria and Tasmania were the only states more likely to have been visited by holidaying Millennials than non-Millennials.

State visited on last domestic holiday: Millennials vs non-Millennials



Source: Roy Morgan Single Source (Australia), April 2015-March 2016, n=7,837

Holiday intention for the next 12 months follows a similar trend. While Millennials (12.9%) are more likely than non-Millennials (9.8%) to be planning an overseas holiday, there is little difference in the proportions of each group planning an Aussie getaway (58.8% and 57.5% respectively).

Once again, Victoria is the clear Millennial destination of choice, with 20.6% of them planning a holiday there in the next 12 months (compared with 16.5% of non-Millennials). NSW tops the list for non-Millennials (19.5%, vs 18.3% of Millennials).

Almost identical proportions of each group are planning trips to Tasmania, WA, the ACT, the NT and Queensland.

Action-oriented and eco-conscious

But just when you started wondering whether the Millennial phenomenon was a case of hype over substance, our data reveals that they do diverge from older travellers in some noteworthy ways: holiday attitudes being a particularly striking example.

A different approach to holidays: Millennials vs everyone else

ATTITUDE STATEMENTS	Millennials (18-34 years)	Non-Millennials (35+)
I'm always very active on holidays	58.3%	48.2%
I like to go away on weekends	56.7%	38.6%
I enjoy holidays where everything is organised for you	38.1%	25.4%
I prefer the bright lights and big cities when I travel	28.8%	12.1%
For my next holiday, I'd really like a total ecotourism experience	27.6%	17.2%
It only feels like a holiday if I leave Australia	16.5%	8.4%

Source: Roy Morgan Single Source (Australia), April 2015-March 2016 (n=14,380). **Base:** Australians 18+

Whereas just 12.1% of Aussies 35+ agree with the statement, 'I prefer the bright lights and big cities when I travel', this figure more than doubles to 28.8% of 18-34 year olds. Attitude statements such as 'I like going away on weekends', 'For my next holiday, I'd really like a total ecotourism experience' and 'It only feels like a holiday if I leave Australia' also reveal considerable variation.

** NB: Like all generational definitions, opinion varies as to Millennials' exact age span, but 18-34 falls within most parameters.*

Norman Morris, Industry Communications Director, Roy Morgan Research, says:

"Millennials seem to be in the spotlight lately, with the travel industry being as fascinated by them as everyone else. But when it comes to holiday habits, 18-34 year-olds have a lot in common with the 35+ demographic, as we have seen. The proportion

who took a holiday in the last 12 months, the proportion planning to take a holiday in the next 12 months and destinations they plan to visit are similar for both groups.

“Certainly, 18-34 year-olds are more likely to travel overseas, but is this really a Millennial thing or more to do with the age? After all, ten years ago, 18-34 year-olds were also more likely than older Aussies to take overseas holidays. More significant for the industry is the fact that overseas travel has increased among both age groups – with domestic holidays falling over the same period.

“Meanwhile, if we compare the holiday attitudes of Millennials and non-Millennials with those of the corresponding age brackets 10 years ago, we find the differences between the two groups still apply. Generally, any changes (either increased or decreased agreement with particular statements) affect both groups rather than 18-34 year-olds only – with one very interesting exception. A decade ago, 22.5% of 18-34 year-olds agreed that they’d like a total ecotourism experience for their next holiday, which has since jumped to 27.6%. But among the 35+ bracket, agreement with this statement has declined.

“Of course, Millennials are the first generation of tech-savvy ‘digital natives’ to have grown up with the internet, so in that respect they differ to 18-34 year-olds of previous decades. Indeed, our data shows they are more than twice as likely as Australians aged 35+ to have booked their last holiday via mobile internet – something we weren’t even measuring 10 years ago!

“And this is the real challenge for the travel industry: to distinguish between those holiday habits shared by Millennials and non-Millennials, those traits that are specific to the age group rather than the current generation, AND those trends that are genuinely, uniquely Millennial. Fortunately, the comprehensive data in Roy Morgan’s Holiday Tracker can help them do just that...”

For comments or more information about Roy Morgan Research’s travel and tourism data, please contact:

Roy Morgan Research -- Enquiries

Office: +61 (3) 9224 5309

askroymorgan@roymorgan.com

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Roy Morgan’s travel and tourism research quantifies the dollar-value of the tourism industry’s diverse markets; and includes detailed information and insights into what activities people look for when travelling, who they travel with, where they get their information, whose advice they seek when planning a holiday and much more.

About Roy Morgan Research

Roy Morgan Research is the largest independent Australian research company, with offices in each state of Australia, as well as in Indonesia, the United States and the United Kingdom. A full service research

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401 Collins Street, Melbourne, Victoria, 3000 – GPO Box 2282U, Melbourne, Victoria, 3001, Australia

Tel: (03) 9629 6888 Fax: (03) 9629 1250 (03) 9224 5387 melbourne@roymorgan.com www.roymorgan.com

organisation specialising in omnibus and syndicated data, Roy Morgan Research has over 70 years' experience in collecting objective, independent information on consumers.

Margin of Error

The margin of error to be allowed for in any estimate depends mainly on the number of interviews on which it is based. Margin of error gives indications of the likely range within which estimates would be 95% likely to fall, expressed as the number of percentage points above or below the actual estimate. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

Sample Size	Percentage Estimate			
	40%-60%	25% or 75%	10% or 90%	5% or 95%
5,000	±1.4	±1.2	±0.8	±0.6
7,500	±1.1	±1.0	±0.7	±0.5
10,000	±1.0	±0.9	±0.6	±0.4
20,000	±0.7	±0.6	±0.4	±0.3
50,000	±0.4	±0.4	±0.3	±0.2

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