



America's Leisure Travelers

In their ground breaking publication *Generations: The History of America's Future 1584 to 2069*, 25 years ago, social historians Neil Howe and William Strauss introduced a provocative theory that the perspectives and actions of each American generation are formed as a result of the history they live through during their coming of age years between ages 17 and 21. The conditions and history in America when today's Silent Generation came of age in the 1940s were very different than when the next generation, the Boomers did so. Fast forward to Generation Z, born since 1997, and life has no resemblance whatsoever to life in 1940. Tracing the beliefs and behavior of every generation since 1584, Howe and Strauss illustrated a four generation cycle that occurred between then and now, over and over again, with only one miss during the Civil War. They revealed how the differences in these world views: Idealist, Reactive, Civic, and Adaptive formed as each generation progressed through their early years, that created the foundations of how today's generations act and think.

There are six generations in the US today. One is tailing off the traveling scene and one is made up of children. The other four are today's prime travelers. The Silent Generation, born between 1928 and 1945, the youngest of whom are nearing 80, will, with rare exceptions, only be traveling a few more years. That leaves the Boomers born between 1946 and 1964, Generation X, born between 1965 and 1980 (83 million), Millennials born between 1981 and 1996 (86 million), and Generation Z born between 1997 and 2012 (68 million) at the generations we need to focus on. At age 26, the oldest of Gen Z are clearly making their own travel decisions, although the youngest in this generation are only 12 years old. They and those born since are traveling with their parents.



Baby Boomers

We will begin by the addressing Baby Boomers, the youngest of whom will be traveling for at least another 20 years. They have held their own as the prime traveling generation much longer than anyone thought. They will serve as a reliable market while tourism marketers figure out what motivates Generation Z to travel. Boomers have traveled more and spent more on travel than any other generation in history and will continue to do so, even though these agile college-aged backpackers of the 60s who went through the Vietnam War during their coming of

age years, have morphed into aging stressed out adults intertwined between family, work, and technology.

There are still more than 70 million Boomers alive today who are 76.1% Caucasian, 9.3% African American, 8.5% Hispanic, 5% Asian and 1% Native American. This is the generation of Cher and Dolly Parton, David Letterman and Roseann Barr, Bill Gates, Steve Jobs, Bill Clinton and George W Bush. Boomers were the first generation in which women attended college in large numbers, intent on doing more than finding a husband. They constantly made history because their attitudes and lifestyle differed so dramatically from the Silent Generation that preceded them, who were for the most part conservative and non-controversial. When Boomers went to work, they entered a significantly altered work place, since by the time they were all at work, employment in agriculture had declined to approximately 3% of adult workers, manufacturing to roughly 17%, and work using information and services, in other words, work done with the head instead of the hands, had risen to the other 80% of workers.

Tourism for this generation transformed from the luxury it was for Silent's to an escape. A time for regeneration to physically remove their bodies and their minds from work. Even though a large number are at, or older than retirement age, fewer have retired than anticipated, and 50% do not plan to retire at all. Since they are no longer forming households or raising children, they have discretionary money to spend on other things. Many do not necessarily even set a budget for travel experiences and would not miss something they want to do because of cost.

Overall, nearly 60% of Boomers have some college or a college degree, a much higher educational level than previous generations. 60% are married, while 25% live alone. About 60% are overweight, with one third obese. Right around 35% have physical difficulties, with joint pain being the most prevalent ailment, and these health conditions eliminate many robust nature-based experiences. Just at 50% believe life is exciting, and only 15% are not happy. Espousing a variety of social positions, 62% support gay marriage, 37% are conservative, and 66% are religious. Over 80% own their homes, and only 5% move each year. Just under 5% consider themselves upper class.

Just at 20% of Boomers who are still employed are self-employed, and more are working part time, often combining this income with retirement funds. Socially, they spend more time with family than friends, and Boomers have on average 18 days per year to devote to leisure. Most Boomers value their health, financial well-being, homes and communities, and prefer stable, single family neighborhoods. Many have worked in professional and managerial careers, read history and biographies, and listen to news and talk television.

Three Segments of Baby Boomers

Boomers are most effectively segmented into older, middle, and younger Boomers, depending on their place on the life continuum. Those who are not retiring are slowing down a bit and giving themselves more flexibility, which means that their travel experiences no longer have to fit into holidays and weekends. It is not unusual for Older Boomers to take off on a couple of day mid-week trip just to get away, or attend an afternoon show or sports event. Health permitting, older

Boomers will remain active and inquisitive until they are 90, and don't expect them, even then, to engage in mindless things.

Many Middle Boomers, ages 67-72 are still involved in jobs, while others are sandwiched between elderly parents in their 90s, grown children, and grandchildren. Having to participate with that many family generations makes life hectic. Leisure experiences become a way to get away from it all and some contemplate retirement as a way to live a slower, simpler life. When that does eventuate, it is anticipated life will include more experiences and things they did not get to do at an earlier age. Most Younger Boomers, now ages 60-66, even those who started families late, are finally empty nesters. Yet, most are still working. They are the visitor segment driving the concept of multi-generational travel to spend quality time with all their family members. Roughly 40% of family trips now include at least two generations, pushing the demand for vacation rentals and other private lodging to accommodate comfortable family time.

Many Boomers have already explored the traditional destinations, sometimes several times, so seeking out new places is a natural progression. The highest priority at these new destinations is to have experiences that allow them to explore, relax, relieve stress, and create lasting memories. A large part of this market is happy to get outside their comfort bubble, willing to try new things that are not physically stressful, learn about different history and cultures, be intellectually stimulated, and challenged to learn new things. They enjoy telling friends and family about their experiences, making it important to leave them with great stories to bring back home.

Planning and booking an experience must be completely stress free and all experiences must include the ability to participate, engage, interact, and enrich their relationship with their spouse, partner and/or children. They also demand genuine authenticity, something that can not be manufactured. Providing the opportunity for conversation and communication is critical since participating in an experience may be the only time they have had to communicate about things of interest with a spouse or significant other in a good while. The more communications flow, the more satisfying the experience.

In contrast to the popular opinion that Boomers are not technically proficient, they are tech-savvy and comfortable online, but it does not run their lives. Of the 83% on at least one social media platform, 78% are on Facebook and 67%, YouTube. Of the 27 hours they spend online each week, 13 are spent on social media. 84% believe that social media improves their lives and with families now spread all over the country, and sometimes even the world, social media enables Boomers to keep up with their children and grandchildren, as well as their friends.



Generation X'ers

Squished between the Boomers and the Millennials, Generation X'ers have traditionally been considered by society to be a smaller, less successful group. Even so, they will be important to attract as visitors, since many will be traveling for the next 40 years.

In many ways their beliefs and behavior are more like the Silent Generation than Boomers. Born between 1965 and 1980, X'ers make up 18.5% of the population. 62.7% are Caucasian, 16.6% are Hispanic, 12.8%, African American, 6.7%, Asian and 1.2% Native American. This is the generation of Brooke Shields, Jennifer Lopez and Jennifer Anniston, Janet Jackson, Michael Dell, and Anderson Cooper.

When Silent Generation and Boomer mothers went to work in droves in the 1970s to boost family incomes, X'ers had to learn to fend for themselves. Many of the "latch key kids" as they were called, returned home from school to an empty house. As they grew up and married, more have experienced divorce than any other generation, resulting in more single parent families. Generation X'ers who had children in their 20s now have children who have graduated college, and often have their own children. Those who were wary of the economy and watching family disintegration waited a few more years to have families. They now have high schoolers or younger. Many of this group who delayed childbearing for a decade or more, are now older first time parents, still raising school age children. X'ers with growing families have completely different priorities than X'ers without growing families.

Even though 65% have some college or a college degree, it is interesting to note that within a generation that has been viewed less positively all their lives, just at 40% consider themselves middle class, while 50% consider themselves working class. 57% believe life is exciting and only 10% are not happy. Because they are younger, X'ers are generally healthier than Boomers, but 80% of men and 60% of women are overweight. One-third of this group is obese, with back pain the prevailing ailment. 90% of men and 75% of women are in the workforce, and the majority have 17 days of leisure per year. Believing that work is too demanding to take time off, 42% have not taken a vacation in the past year.

Even though X'ers were the first generation where being multicultural was normal and a larger percentage are of more than one race than their elders, they are more conservative in their social views than Boomers. Many have lived their entire lives

suspicious of Boomer values of social disruption, drug use, and other rebellious habits. More time is spent with family during the week, and with friends on the weekends.

Middle aged couples who live comfortably in suburban neighborhoods appear in no hurry to retire since many work in professional and managerial jobs. In addition, 45% have investment income that supplements household income. Life is focused on home, home improvement, and some DIY. They are comfortable with computers, watch television, and read the Sunday newspaper. From a social media perspective, 81% are on Facebook, 75% watch YouTube videos everyday, and 67% have made a purchase after watching. Instagram, Twitter, (now X), and LinkedIn are the next more popular with this group.

In addition to suburban dwellers, a significant portion of Generation X'ers enjoy authentic, rural-oriented culture, seeking a different kind of rural oriented experience that is less expensive, more authentic, and more down to earth. This group loves country music and attends more musical events than any other visitor segment. Even so, they are more likely to stay at a resort while doing so.

Even though X'ers were the hardest hit during the Great Recession of 2008, their finances have since recovered. Just over 65% own their own homes, but only 25% are satisfied with their financial situation. This factor makes them more price sensitive in their travel decisions. And they take longer to plan and reserve their experiences because they are more cautious and prefer no surprises. They seek value for the money, reasonably priced accommodations and are not, for the most part, ostentatious spenders. In fact, 62% see cost as a barrier to travel. They like

their hotel stays more standard and more predictable and since that is the case, they are a potential market for special group experiences. 70% want relaxation when they travel, while the other 30% like excitement. They take 4-5 trips a year, spring, summer, and fall, and travel mostly domestically and regionally. 52% enjoy vacations close to home, 34% use flash sales to purchase travel, 26% stay connected via the internet or email while on trips, 82% have booked travel online, and nearly all use mobile phones while on trips.





Millennials

Try to envision how much has changed in the world in the past 10 years. Then try to imagine what things will look like 60 years from now. Perhaps virtual reality will eliminate the need for ever leaving the house, or collectively owned, self-driving vehicles will transport people from place to place, while they sleep right in the vehicle. Other developments could be equally as astounding. Yet they will all happen within the lifespan of Millennials, who will be traveling for the next 60 years!

Born between 1981 and 1996, Millennials are 63.7% Caucasian, 20.8% Hispanic, 13.1% African American, 7.3% Asian and 1.2% Native American. This is the generation of Kim Kardashian, Amy Schumer, and Beyonce'. They range politically from Democratic Congresswoman Alexandria Ocasio-Cortez to Republican Governor Sarah Huckabee Sanders. Chelsea Clinton, Jenna Hager Bush, Meghan Markle, and Paris Hilton are all part of this very interesting mix of individuals. When immigrants, foreign students, and others coming into the country joined the ranks of native born Millennials, (more immigrants legally moved to the United States between 1990-2009 than in the prior 60 years) they are now America's largest population block, yet more fractured and segmented than older visitor markets. Based on those circumstances, the various segments of Millennials "live on several different planets."

Now in their 30s and 40s, there are college-educated enterprising professionals, Millennials with young families, debt burdened past students, continuing students, students or past students living with parents, the young and educated seeking a place to settle down and young urbanites with no urge to settle down. Issues that are important to one group have no bearing on another. Overall, about 70% of Millennials have college degrees or some college, and it is education that has greatly effected the world view, attitudes, and values of this generation and determined their life path. As a result, they are likely the first generation that can effectively be segmented along economic/education and class lines, rather than age.

When Millennials hit workplaces populated by thousands of Boomer managers, they were viewed as "those younger people" who do not think or act like we do.

And, even though the oldest in this generation graduated college several years ago, many are still searching for the right occupation, making their economic lives very different from 30 and 40-year-olds of the past, who were at the height of their careers and quest for economic achievement. As a result, this generation has more “gig” workers than any other population segment in the US, and 42% of young adults work in positions below their qualification level. On the other hand, other Millennials are no longer impoverished college students searching for the best deal.

Some who married early have nearly grown children, although the current economic situation in the US has caused many to have to wait longer to buy homes, get married or have children. Only 24% of households have children under age 18 living in the home, and only 29% of that group have stay at home mothers. Some scholars believed this situation would change as they aged. But it did not, and Millennial child-bearing has not reached replacement rate in the United States. That phenomenon is not likely to change since many do not see children in their future at all. In fact, a large number of this generation are not settling into the lifestyles traditionally equated with their age group such as buying a house and a car. Over 50% of Millennials consider life exciting and one third say they are very happy. Three-fourths are liberal or moderate, and only 48% are religious. Just over 40% view themselves as middle class, and 50% as working class. Even though median household income is over \$110,000 for college educated Millennials, a large number still live with their parents. 40% of Millennials are either multi-racial or of a race other than Caucasian and as a generation, they are cognizant of the need for equality. Working women are the norm. Back pain, asthma, and migraines, the markers of stress, are the prevailing ailments. 20% use illegal drugs. Accidents, suicide, and homicide are the leading cause of deaths. 63% are in good health, although 61% of men and 53% of women overweight.

Millennials consider technology as both a given and a facilitator in their lives, since they came of age when the internet came of age. They stay connected wherever they go, spending an average of 2 hours 38 minutes online every day. 90.4% are on social media and 86% use it daily. 87% of Millennials are on Facebook, 86% on YouTube, 72% on Instagram, and 52% on Snapchat and respond best to multiple content types that include videos and images. They spend time with both friends and family during the week and on the weekends, and the internet is their primary news source, with only 14% reading newspapers.

Since Millennials appreciate work/life balance, they take regular breaks. Because so many have traveled with their Boomer parents for decades, Millennials consider travel and leisure a birthright rather than a luxury. 91% of this generation travels and 66% consider travel an important part of their lives. It is not unusual for two or more to set off on a weekend experience with no more planning than an hour on Thursday or Friday night. Even though they are likely to spend more money on experiences than possessions, they still want to know every little pricing detail and do not pay full price for anything, ever. They take the time to check as many as 10 sources before making a purchase, and as one would imagine, they do all of it on their smartphone. With such a large percentage educated, travel has to be mentally interesting, and if outdoors, exhilarating, otherwise it is boring. This generation demands to be engaged in interactions with any destination they are considering to visit.

Over 65% value unique experiences and customization that reinforces their individuality, and 70% seek immersive, interactive, and hands-on experiences.

Some opt for a combination of individual experiences that offers cohesive immersion in their particular area of interest. Gone are the days of drive by sightseeing, Millennials want to be involved. More than 80% indicate they have attended events and participated in live experiences over the past year, and over 70% say they will increase spending on experiences in the next year.

When considering any experience, Millennials expect to find comprehensive information right at hand and readily available on a website. If an experience states that it is unique, they expect full details about how it is. They also expect all of the information to be accurate and truthful, and hold up upon comparison to the information they find on other websites to verify accuracy. Millennials want the organizations from which they purchase to be comfortable with reviews and other consumer created content, without any negative details edited out. Many discover new opportunities through their peers on social media and review sites like TripAdvisor, Yelp and Airbnb. They also do not abide by any supplier restrictions placed on a purchase, and if there are, they will merely find another alternative somewhere on the internet that better suits their needs. When they travel, Millennials want to experience small towns and historic places and enjoy a variety of cultural experiences. They regularly combine leisure with business travel and staying an extra night to explore a destination becomes a badge of honor for Millennials who place more emphasis on the balance between work and play than Boomers who rushed back to their offices on red-eye flights all those years. This type of extended stay is good for communities seeking to recruit additional educated Millennials to join their workforce and move to their communities. If Millennials have never visited a destination, it is very unlikely they would relocate there. But a visit, even during a business trip, greatly increases that possibility.



Generation Z

Born between 1997 and 2012, Generation Z is made up of both adults and children. They are more multi-cultural than any other generation, with only 52.9% Caucasian. 23.4% are Hispanic, 15.3%, African American, 6.9%, Asian, and 1.5% Native American. This is the generation of Naomi Osaka, an American of Japanese and Haitian descent who plays tennis for Japan, Billie Eilish, Simone Biles, David Hogg who lived through the Parkland, Florida high school shooting, fighting for gun control, and Barron Trump.

Generation Z are true digital natives, and do not know life without sophisticated technology. The average Gen Z child received their first mobile phone at age 10. Many expect instant gratification from electronic communications since they grew up playing with their parents' mobile phones or tablets, in a hyper-connected world. Spending on average three hours a day on their mobile device, their smartphone is their preferred method of communication. At least 90% are on social media with 88% on YouTube, 78% on Instagram, 74% on Facebook, 69% WhatsApp, 68% TikTok, and 67% on SnapChat. 38% of Generation Z's spend more than four hours a day on these platforms and they use different platforms for each stage of their buying journey.

It is not outrageous to say this generation does not approach life as previous generations. Even though they do not have memories of 9/11, they are aware of the social conditions the attacks created. Both international and domestic terrorism has been part of their lives since birth, including witnessing multiple mass shootings. They have felt family stress due to the shrinking of the middle class and the recession of 2008. Many do not drive and a lot don't own a car. They are not marrying and having families at anywhere near the rate of older generations, causing the average age of marriage in the US to approach age 30. Only 5% of this generation have children, and because many are still children, 72% live with their parents.

Most importantly, they value individual expression, protect their privacy, spend based on their values, and believe in diversity and equality. Gen Z'ers are much more gender fluid than older generations, with 20% identifying as gay, vs. 3% of the general population. 22% of Generation Z's have one or more immigrant

parent and only a little over 50% are Caucasian, making them much more cognizant of race, while at the same time, most are more comfortable to be around people of all races. Only around 10% are married at this point, and nearly 50% say they do not plan to have children. Of those who are of age, 60% have college degrees or some college and 93% of those are first generation students. Nearly 80% say getting a college education is important, however, even at a very young age, they are already worried about student debt and the ability to afford college at all.

According to the Huffington Post, Generation Z's differ from Millennials in several key ways. They are less focused, but better multi-taskers. Even though they have lived through the Great Recession, they are less price conscious. Employers are predicting that many more Z'ers will try to go straight into the workforce instead of going to college, but time will tell if that is possible in today's tech and knowledge sophisticated workplaces. It will be interesting to track this generation as more grow into adults and how they do, or do not, adapt to the social and workplace conditions currently in place in America. As more of Generation Z reach adulthood, we will be able to better assess the real characteristics of this generation and how those will effect participation in tourism experiences. After growing up under the microscope of social media, deluged with a litany of unrealistic and artificial photoshopped images of their peers and advertisements for brands, Gen Z craves reality and is calling for radical transparency. They also place a high value on sincerity and authenticity.

Right now, places that Generation Z want to live and visit (1) provide endless experiences, (2) inspire one to try new things, (3) care about the environment and

natural resources (4) celebrate diversity, (5) are fun and free-spirited, (6) where people live life to the fullest, (7) inspire people to dream big, (8) where one can be oneself, (9) are forward thinking with an innovative culture, and (10) are open minded.

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