U.S. Experiential Traveler Trends 2019:
Annual Survey on Traveler Behavior, Motivations, and Preferences

Skift Research
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Report Overview

Skift Research presents the results of the third iteration of our U.S. Experiential Traveler Survey. We began fielding this survey in 2016, when the concept of “experiential travel” still seemed new and different. Now, we understand “experience” as being an integral and desired part of all leisure travel, yet nuances about what experience means continue to shift. We’ve decided to run this study every year to capture what’s changed and what’s stayed the same to help the travel industry stay up to date with trends and respond accordingly. The main focus of this latest report is year-over-year comparisons to highlight changes as well as trends that are remaining stable. We will release a separate report highlighting key demographic trends later in the year.

We begin the report by showcasing the biggest trends for 2019, which we identify as areas with the most significant changes from last year and/or 2016. These big areas of change include evolutions in travel motivations, planning and booking preferences, travel priorities, and alternative accommodation use. We then present the rest of the survey’s results including the previous year’s data (or years’ where relevant, as the 2016 data was more limited), to give a complete picture of what has changed and what remains consistent over time.
Survey Methodology

Skift Research’s U.S. Experiential Traveler Survey 2019 collected responses from 1,300 respondents who live in the U.S. To qualify, respondents had to indicate that they had taken at least one extended leisure trip (at least one night’s stay 200 miles or more from home), one round-trip flight for non-business purposes, and stayed at a hotel for at least one night, all in the last 12 months. Respondents also met quotas for gender, age, combined household income, and region based on the sample of U.S. travelers represented in the Bureau of Labor Statistics’ 2016 Consumer Expenditure Survey. The survey was fielded by a trusted third-party consumer panel provider.

Throughout the report, we compare 2019 results to 2018 results. You can see the methodology for that survey here. Results from 2016 are also included for comparison where relevant. Learn more about that survey here.
New Trends for 2019:

Themes That Stand Out

It has been over a year since we fielded the last version of this survey, and over two years since the inaugural version. In this section, we showcase the results that exhibit the most significant changes over time.

Travelers are more motivated to travel by adventure than they were in the past and are more likely than ever to have stayed in an Airbnb.

This year, there is also a increased preference for hyper-local, unique, and transformative travel experiences. Travelers are specifically looking for experiences that will change their world perspective.

Travelers are also more thoughtful about the environment and their own personal wellbeing than they have been in the past years, and both of these things will have strong ramifications when it comes to their travel preferences and behaviors.
Travel Motivations

Which of the following are your top motivators for travel? Please select your top two motivators.

- Relaxation
- Getting away from home
- Experiencing different cultures
- Enhancing relationships
- Self-discovery
- Meeting new people
- Wellness
- Other

2016 N=1375, 2018 N=1208, 2019 N=1300

Source: Skift Research, U.S. Experiential Traveler Survey 2019

“Relaxation” is a less important motivator, while “experiencing different cultures” has grown in importance.
Travel Motivations

Which factor holds you back the most from traveling more?

- Not enough money: 59% (2019) vs. 48% (2018)
- Not enough time: 30% (2019) vs. 22% (2018)
- Neither of the above: 22% (2019) vs. 22% (2018)
- I can travel whenever I want: 60% (2019) vs. 60% (2018)
- I do not want to travel more than I do: 17% (2019) vs. 17% (2018)

Money is more of a hindrance to travel this year than it was last year.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Travel Motivations

Which of the following words best describe your ideal travel experience? Please select up to five words.

Even though “relaxation” has declined as a travel motivator, a larger share of respondents still describe their ideal vacation as “relaxing,” while “adventurous” also saw a large increase.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Planning & Booking

How likely are you to book all parts of a vacation completely through one channel instead of using multiple channels?

An 11 percentage point larger share of 2019 respondents are likely to book a vacation all through one channel compared to 2018.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Planning & Booking

Which do you consider the most important sources of information during travel planning? Please select up to 2 answers.

<table>
<thead>
<tr>
<th>Source</th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel review websites (such as TripAdvisor)</td>
<td>49%</td>
<td>41%</td>
</tr>
<tr>
<td>Destination websites</td>
<td>32%</td>
<td>21%</td>
</tr>
<tr>
<td>Advice from friends and/or family</td>
<td>40%</td>
<td>31%</td>
</tr>
<tr>
<td>Online travel agencies (such as Expedia and Booking.com)</td>
<td>17%</td>
<td>30%</td>
</tr>
<tr>
<td>Search engine results</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>Travel books / guide</td>
<td>12%</td>
<td>13%</td>
</tr>
<tr>
<td>Traditional travel agent</td>
<td>6%</td>
<td>9%</td>
</tr>
<tr>
<td>Social media</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td>1%</td>
<td>0.3%</td>
</tr>
</tbody>
</table>

“Travel review websites” and “advice from friends and/or family” declined in importance, while “destination websites” and “online travel agencies” are more important info sources than they were in 2018.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Destination Selection

How likely are you to visit a national park in the next two years?

A 9 percentage point larger share of 2019 respondents say they are likely to visit a national park in the next two years compared to 2018.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Destination Selection

Please indicate how much you agree or disagree with the following statement:
I believe the destinations I visit say a lot about who I am.

<table>
<thead>
<tr>
<th>Agree</th>
<th>Neither agree nor disagree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>59%</td>
<td>32%</td>
<td>9%</td>
</tr>
<tr>
<td>66%</td>
<td>25%</td>
<td>9%</td>
</tr>
</tbody>
</table>

A 7 percentage point larger share of 2019 respondents agree that the destinations they visit say a lot about who they are compared to 2018.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
In-Destination Attitudes & Preferences

Please indicate how much you agree or disagree with the following statement:
I specifically look for travel experiences that give me a new perspective on the world.

A nearly 20 percentage point larger share of 2019 respondents want their travels to give them a new perspective on the world compared to 2018.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
In-Destination Attitudes & Preferences

When on vacation, which do you prefer?

- Keeping to popular areas and activities: 33% (2018), 39% (2019)
- Going off the beaten path: 30% (2018), 27% (2019)
- I have no preference: 34% (2018), 32% (2019)
- I am not sure: 3% (2018), 2% (2019)

A 6 percentage point larger share of 2019 respondents prefer to keep to popular areas and activities compared to 2018.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
In-Destination Attitudes & Preferences

Please indicate how much you agree or disagree with the following statement:
I don’t want to feel like a tourist while on vacation.

<table>
<thead>
<tr>
<th>Agree</th>
<th>Neither agree nor disagree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>68%</td>
<td>35%</td>
<td>12%</td>
</tr>
<tr>
<td>53%</td>
<td>24%</td>
<td>8%</td>
</tr>
</tbody>
</table>

A 15 percentage point larger share of 2019 respondents agree that they do not want to feel like tourists while on vacation compared to 2018.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
In-Destination Attitudes & Preferences

Please indicate how much you agree or disagree with the following statement:
I like vacationing with locals in their neighborhoods.

A 16 percentage point larger share of 2019 respondents agree that they like vacationing with locals in their neighborhoods compared to 2018.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Accommodations

Have you ever used Airbnb to book an apartment or home rental as part of a leisure trip?

2018 N=1208, 2019 N=1300

A 8 percentage point larger share of 2019 respondents have stayed in an Airbnb at least once compared to 2018. Just over 4 out of 10 2019 respondents have used Airbnb.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Accommodations

How likely are you to stay at an Airbnb accommodation while on vacation in the next 12 months?

A 14 percentage point larger share of 2019 respondents say they are likely to stay in an Airbnb in the next year compared to 2018.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
When traveling, do you prefer to stay at a branded chain hotel or an independent boutique hotel?

- **Branded chain hotel**
  - 2018: 57%
  - 2019: 47%

- **Independent boutique hotel**
  - 2018: 16%
  - 2019: 11%

- **I have no preference**
  - 2018: 25%
  - 2019: 41%

- **I’m not sure**
  - 2018: 2%
  - 2019: 1%

A 10 percentage point smaller share of 2019 respondents prefer staying at branded chain hotels, while a 16 percentage point greater share have no preference for either type of hotel compared to 2018.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Social Media

Which social media site do you prefer sharing photos of your vacation photos on?

- Facebook: 46% (2018), 49% (2019)
- Instagram: 17% (2018), 23% (2019)
- Snapchat: 3% (2018), 4% (2019)
- Twitter: 2% (2018), 2% (2019)
- I don't share my vacation photos on social media: 32% (2018), 21% (2019)
- Other (please specify): 1% (2018), 1% (2019)

A 6 percentage point greater share of 2019 respondents prefer sharing vacation photos on Instagram, and an 11 percentage point smaller share does not share any on social media.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Social Media

Please indicate how strongly you agree or disagree with the following statement:

It is important for me to share photos of my travels on social media.

A 10 percentage point greater share of 2019 respondents agree that it’s important for them to share vacation photos on social media.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Attitudes & Values

Please indicate how much you agree or disagree with the following statement:
I’m willing to pay higher rates/fares to use a travel service provider who demonstrates environmental responsibility (consider hotels, airlines, etc.).

A 13 percentage point larger share of 2019 respondents agree that they are willing to pay more for environmentally responsible travel service providers compared to 2018.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Please indicate how much you agree or disagree with the following statement:
Improving my physical and emotional wellbeing is more of a focus for me than
it was three years ago.

A 10 percentage point larger share of 2019 respondents agree that they focus more on improving their health and wellbeing today than they did three years ago versus 2018 respondents.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Other 2019 Results:

Compared to Past Years

In this section, we present the rest of the 2019 results alongside 2018 results (and 2016 where relevant). Although most of the changes over time seen here aren’t as significant as those in the previous section, the data still show some meaningful patterns, like a growing preference for using online travel agencies and other third-party websites to book different parts of a trip.

Even the data that show little or no change tell us what behaviors and preferences may be more deeply embedded, habitual, or important to U.S. travelers. For instance, we saw very little change in the number of trips taken by respondents, their preferences related to hotels, and their use of vacation rental companies other than Airbnb.
Recent Trip History

How many extended leisure trips have you taken in the last 12 months?
An extended leisure trip includes at least three nights' stay in a destination 100 miles or more from home.

The frequency of extended leisure trips remains stable.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Recent Trip History

How many leisure trips have you taken in the last 12 months that included at least one night’s stay in a hotel?

- 2018 N=1208, 2019 N=1300
- 2018: 26%, 2019: 28%
- 2018: 19%, 2019: 20%
- 2018: 11%, 2019: 10%
- 2018: 6%, 2019: 6%
- 2018: 10%, 2019: 10%
- 2018: 0%, 2019: 5%
- 2018: 10%, 2019: 10%

The frequency of leisure trips that included a hotel stay remains stable.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Recent Trip History

How many round-trip flights have you taken for leisure trips (non-business) in the last 12 months?

The frequency of round-trip flights for leisure trips has stayed fairly consistent.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Recent Trip History

How many leisure trips outside the U.S. have you taken in the last 12 months?

A slightly smaller share of 2019 respondents traveled internationally for leisure compared to those in 2018.
Recent Trip History

Have you taken a last-minute vacation in the past 12 months (i.e. a vacation planned within 48 hours of departure)?

The share of respondents who have taken a last-minute vacation in 2019 hardly changed from 2018.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Destination Selection

Thinking about your household, are you the primary decision maker when it comes to planning for and booking vacations and trips?

The share of respondents who report being the primary travel decision maker has stayed nearly the same from 2018 to 2019.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Destination Selection

For your next trip, are you more likely to travel to a new destination, or a destination that you’ve already visited?

A larger share of 2019 respondents are more likely to travel to a new destination for their next trip, but it’s still almost 10 percentage points less than the share of 2016 respondents.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
In-Destination Attitudes and Preferences

Given the choice, do you prefer traveling alone or with other people?

![Bar Chart]

Traveling with other people is still largely preferred over traveling alone.

Source: Skift Research, U.S. Experiential Traveler Survey 2019

Given the choice, do you prefer traveling alone or with other people?

- With other people: 84% (2018), 85% (2019)
Travel Booking

How do you typically book a hotel?

A slightly larger share of 2019 respondents typically use a third-party website to book a hotel rather than booking direct compared to 2018.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Travel Booking

How do you typically purchase tickets for in-destination attractions (i.e. amusement parks, tours, museums, show tickets, etc.)?

When it comes to the method most often used to buy in-destination attraction tickets, the distribution of responses has stayed almost the same for 2019.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Travel Booking

Have you used a traditional travel agent to book any part of a trip during the last 12 months?

- Yes, I have used a traditional travel agent.
- No, I have not used a traditional travel agent.

Just under a third of respondents had used a traditional travel agent in the last 12 months in both 2018 and 2019.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
How likely are you to use the services of a traditional travel agent for a vacation in the next two years?

A slightly larger share of 2019 respondents say they’re likely to use a traditional travel agent in the next two years compared to 2018.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Travel Booking

How many websites do you typically use to book all the parts of your vacation? Consider booking flights, accommodations, and activities.

The distribution of the number of websites used to book all parts of a vacation has stayed fairly consistent from 2018.

Source: Skift Research, U.S. Experiential Traveler Survey 2019

2018 N=1208, 2019 N=1300
Travel Booking

Through which method of booking do you normally get the best prices for travel services (including accommodations, flight tickets, and attractions)?

- Through the travel service provider directly (website, phone, in person)
- Through a third-party website (such as Expedia, Booking.com, Trivago, ...)
- Through a traditional travel agent
- Other (please specify)

In 2019, respondents still agree that third-party websites like OTAs and metasearch sites have the best deals.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Accommodation Preferences

Overall, how satisfied were you with your last Airbnb experience?

Respondents who have used Airbnb are still largely satisfied with their last experience.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Accommodation Preferences

Please indicate how strongly you agree or disagree with the following statement:
Accommodations through a service like Airbnb are typically more affordable than traditional hotels.

Accommodation Preferences

Nearly 90% of 2019 respondents who have stayed in an Airbnb agree that this type of accommodation is typically more affordable than traditional hotels, a nearly 6 percentage point larger share than among 2018 respondents.

2018 N=400, 2019 N=533

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Accommodation Preferences

Overall, what type of accommodation experience do you prefer?

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Airbnb experience</td>
<td>39%</td>
<td>36%</td>
</tr>
<tr>
<td>The hotel experience</td>
<td>38%</td>
<td>38%</td>
</tr>
<tr>
<td>I have no preference</td>
<td>20%</td>
<td>25%</td>
</tr>
<tr>
<td>I am not sure</td>
<td>3%</td>
<td>2%</td>
</tr>
</tbody>
</table>

2019 respondents are just about as split in their preference for the Airbnb versus hotel experience. A 5 percentage point greater share this year have no preference compared to 2018.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Accommodation Preferences

Have you ever used HomeAway or VRBO to make an apartment or home rental booking?

- Yes, at least once: 27% (2018), 28% (2019)
- No, never: 62% (2018), 59% (2019)
- I have never heard of these sites: 11% (2018), 14% (2019)

Use of HomeAway and VRBO to book vacation rentals among respondents has not changed much compared to 2018.

Source: Skift Research, U.S. Experiential Traveler Survey 2019

2018 N=1208, 2019 N=1300
Accommodation Preferences

Have you ever Booking.com to book an apartment or home rental?

- Yes, at least once: 36% (2018) vs 33% (2019)
- No, never: 61% (2018) vs 63% (2019)
- I have never heard of Booking.com: 3% (2018) vs 4% (2019)

Use of Booking.com to book vacation rentals among respondents has not changed much compared to 2018, but is slightly lower.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Accommodation Preferences

What are your key motivators when booking a hotel? Please select your top two.

In 2019, price and location are the top motivators when booking a hotel, as they were in 2018. Loyalty is still the least important factor.

Source: Skift Research, U.S. Experiential Traveler Survey 2019

2018 N=1208, 2019 N=1300
Accommodation Preferences

What is most important to you in terms of your actual hotel stay and experience?

- Convenient food and beverage options (i.e., traditional room service, continental breakfast, etc.)
  - 2018: 38%
  - 2019: 40%

- Convenience-based amenities (i.e., iron, fitness center, phone chargers, etc.)
  - 2018: 29%
  - 2019: 27%

- Experiential-based amenities (i.e., bike access, social activities, pop-up events, lively lobby, etc.)
  - 2018: 15%
  - 2019: 18%

- Interesting food and beverage options (i.e., hip setting and design, unique menu options, table service, etc.)
  - 2018: 18%
  - 2019: 16%

Compared to 2018, respondents’ hotel preferences haven’t changed much, but “experiential-based amenities” have moved up a spot in importance.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Accommodation Preferences

Please indicate how much you agree or disagree with the following statement:

I am loyal to a few hotel brands that I like and I rarely stay at others.

The share of 2019 respondents who agree that they are loyal to just a few hotel brands that they usually stay at is the same as the 2018 share that reported the same.

Source: Skift Research, U.S. Experiential Traveler Survey 2019

2018 N=1208, 2019 N=1300
Accommodation Preferences

On a typical leisure trip, how much do you normally spend on your accommodations per night?

The distribution of typical nightly hotel spend has almost remained the same as 2018. A 62% share of respondents in 2018 and 2019 typically spend between $76 and $150 per night.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Trip Planning Preferences

Please indicate how much you agree or disagree with the following statement:
I enjoy the trip planning process, including things like researching and booking accommodations, flights, and things to do.

A 5 percentage point larger share of 2019 respondents agree that they enjoy the trip planning process versus 2018.

Source: Skift Research, U.S. Experiential Traveler Survey 2019

2018 N=1208, 2019 N=1300
Trip Planning Preferences

Please indicate how much you agree or disagree with the following statement:
I love to talk about my upcoming leisure travel arrangements with my friends.

A slightly larger share of 2019 respondents agree that they love talking about upcoming vacations with their friends compared to 2018.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
I want to come back having experienced something new.

I want to come back feeling rested and recharged.

Having new experiences is still more important in 2019, but coming home feeling rested was chosen by a slightly larger share of respondents this year.

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Trip Planning Preferences

When traveling would you rather spend more money on nicer accommodations or on activities such as tours, dining, and events?

Most 2019 respondents would rather spend more on better activities, like in 2018, but the preference for spending more on nicer accommodations garnered a 5 percentage point larger shared this year.

Source: Skift Research, U.S. Experiential Traveler Survey 2019

2018 N=1208, 2019 N=1300
## Airline Preferences

Which airline do you prefer?

<table>
<thead>
<tr>
<th>Airline</th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Southwest</td>
<td>32%</td>
<td>27%</td>
</tr>
<tr>
<td>Delta</td>
<td>19%</td>
<td>23%</td>
</tr>
<tr>
<td>American Airlines</td>
<td>17%</td>
<td>19%</td>
</tr>
<tr>
<td>United</td>
<td>13%</td>
<td>12%</td>
</tr>
<tr>
<td>No preference</td>
<td>12%</td>
<td>14%</td>
</tr>
</tbody>
</table>

In 2018, Southwest was the clear favorite airline. This year, however, Southwest received a smaller share of and Delta a larger share, putting them neck and neck in the top two spots.

Source: Skift Research, U.S. Experiential Traveler Survey 2019

2018 N=1208, 2019 N=1300
Airline Preferences

How satisfied are you with your preferred full-service airline?

Respondents are still largely satisfied with their preferred airline. A 4 percentage point larger share of 2019 respondents say they’re satisfied compared to 2018, putting satisfaction over 90%.

Source: Skift Research, U.S. Experiential Traveler Survey 2019

2018 N=1065, 2019 N=1117 (excluding those who said they didn’t have a preferred airline)
Airline Preferences

Please indicate how strongly you agree or disagree with the following statement:
There is really no difference between the major full-service airlines.

Source: Skift Research, U.S. Experiential Traveler Survey 2019

Just one-third of 2019 respondents agree that there is really no difference between major airlines, a slightly larger share than 2018. More respondents disagree.

2018 N=1208, 2019 N=1300

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Personal Values

Please indicate how strongly you agree or disagree with the following statement:
I see value in goods and services that enable me to learn something new.

A 6 percentage point larger share of 2019 respondents agree that they see value in goods and services that enable them to learn new things compared to 2018.

2018 N=1208, 2019 N=1300

Source: Skift Research, U.S. Experiential Traveler Survey 2019
Personal Values

Please indicate how strongly you agree or disagree with the following statement:
The most worthwhile travel experiences are typically the most expensive.

While the majority of 2019 respondents still disagree that the most worthwhile travel experiences are the most expensive, a 6 percentage point larger share agreed with this statement than did last year.

Source: Skift Research, U.S. Experiential Traveler Survey 2019

2018 N=1208, 2019 N=1300
Please indicate how strongly you agree or disagree with the following statement:
I hold a strong emotional connection to the places I visit on vacation.

2018 N=1208, 2019 N=1300

A 6 percentage point larger share of 2019 respondents agree that they hold a strong emotional connection to the places they visit on vacation versus 2018.

Source: Skift Research, U.S. Experiential Traveler Survey 2019