



Millennial Travellers

Re-writing the Tourism Landscape

Get to know a target group that is full of adventure

The millennials, defined here as people born between 1980 and 1999, are the **largest generation ever** – and they have a high affinity for travelling the world.

However, their demands concerning **individualism, experience and local exploration** in travelling are largely **unmet by destinations** and **tour operators**, leading to a shift towards **individual booking and the sharing economy**, e.g. Airbnb.

Travel companies need to **understand this critical target group in detail** in order to meet their demands and get them to book your services.

This report targets four of the main source markets for millennials as tourists: the UK, US, Germany and China.



Which types of tourism are millennials seeking?



What kind of travellers are they?



Via which channels do you reach them best – in both booking and communication?



Which activities do you need to offer and highlight?



Which brands perform well for millennials – both in travel and other sectors?



Which technologies are they using – which ones should you use to target them?

Part 1: Education, wealth and adventurousness – your perfect target group

A large, illuminated waterfall cascades down a rocky cliff face at night. In the foreground, several people are silhouetted against the bright spray of water, sitting on a concrete ledge. The scene is dark and moody, with the waterfall being the primary light source.

People born between 1980 and 1999 are called millennials.

More than one in four people alive today belong to the millennial generation.*

*Source: PopulationPyramid.net

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Millennials are one of the largest generations ever

Share of people belonging to the millennials generation:



26%
16m



23%
73m



21%
17m

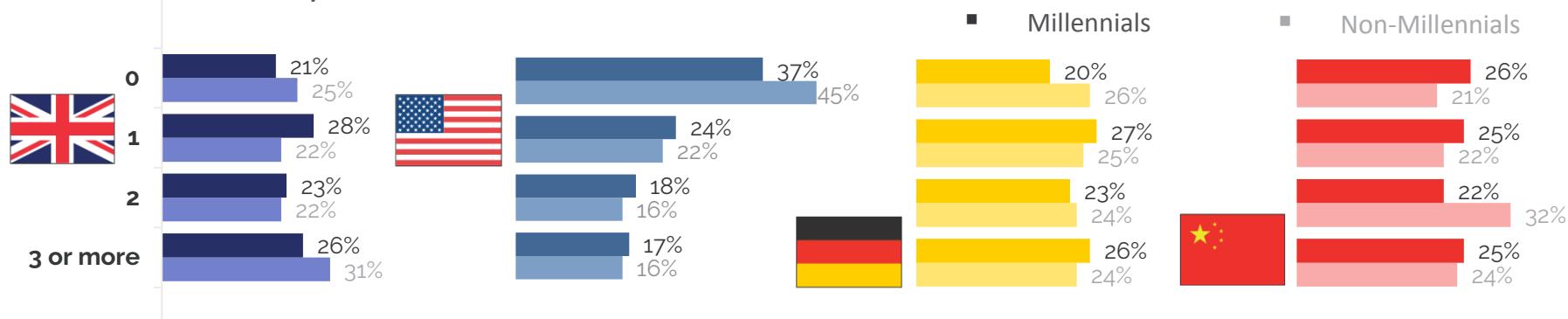


31%
415m

Sources: US Census Bureau, statista, Office for National Statistics; China: Goldman Sachs

Millennials are engaging in travel – bucking the trend of travelling more as they age towards retirement

Number of holidays taken in the last 12 months*:



Apart from China, millennials are less likely to go for only one holiday. They are using their spending power to gather experiences around the world – helped by low-cost travel options.

Millennials booking online:



At the same time their booking behaviour clearly favours online channels where they create their own holidays – even in traditional tour operator markets such as Germany.

*“Don’t know” answers not shown

They love adventure and cultural trips and want to get to know the local culture, habits and people



Which, if any, of the following types of leisure trip do you enjoy taking?

Relaxing at the beach is a priority:



Top 3 total

1. City trips
2. Beach holiday
3. Relaxation holiday with sightseeing



Top 3 total

1. Beach holiday
2. Lake/mountains/countryside
3. Sightseeing



Top 3 total

1. Beach holiday
2. City trips
3. Relaxation holiday with sightseeing



Top 3 total

1. Beach holiday
2. City trips
3. Relaxation holiday with sightseeing

However, millennials show far more interest in these holidays compared to older generations:



Top 3 difference

1. City trips
2. Activity/sport holiday
3. Cultural holiday



Top 3 difference

1. City trips
2. Event trips
3. Activity/sports holiday



Top 3 difference

1. Holiday with several destinations
2. City trips
3. Winter sport holiday



Top 3 difference

1. Sailing/boating
2. Winter sport holiday
3. Camping and outdoors

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Part 2: Destinations, tour operators and platforms are not targeting the millennials sufficiently



The classic tour operators are not as relevant for the millennial generation.

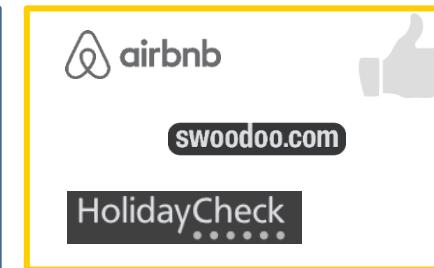
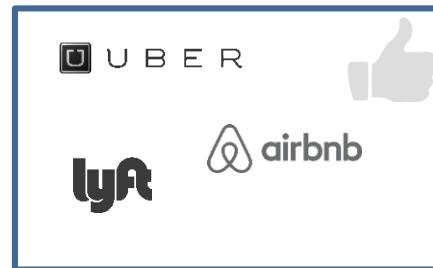
Millennials are more likely to use platform based services like Airbnb and Uber when they plan their holidays, heavily affecting the choice of holidays they take.

Millennials search for experience and individualism

These ‘traditional’ brands are less often considered by millennials compared to older generations:



‘Modern’ platforms are, by contrast, considered far more often :



You can analyse your own brand and monitor it for decline and recovery with crisis events or longer term brand progression or decline.

For information see <http://www.brandindex.com/>

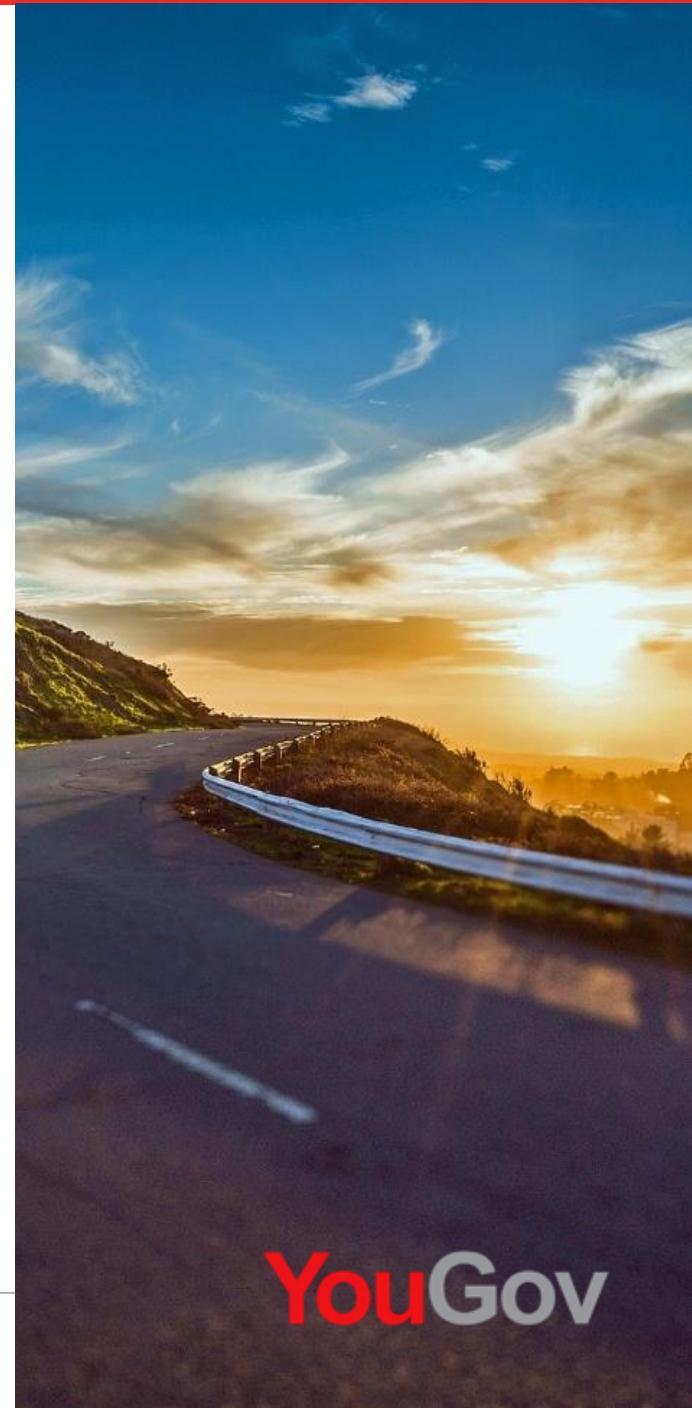
Question: “In general, which of these travel agencies & booking websites would you consider next time you book a trip/hotel/flight?”

Many destinations need to do more

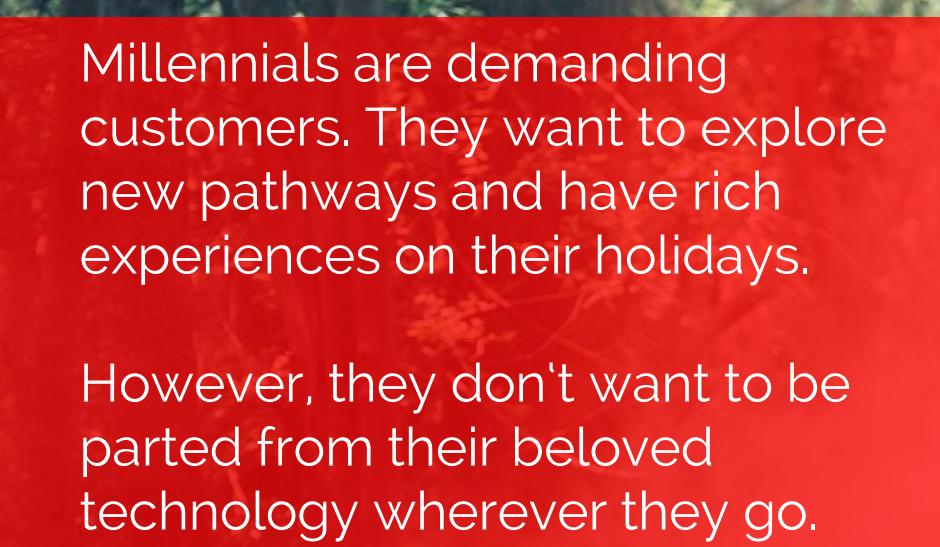
Many destinations have not taken appropriate steps to fully meet the demands of millennials. This is one reason why they have **shifted towards new distribution and information channels**, away from travel agents/tour operators offering predefined package tours where they may have to book all or nothing.

Young people on holiday are **striving for independence and individuality** – predefined packages will **not serve their needs**. Millennials as a group are looking for more **esoteric, unique experiences** when compared to other groups.

While many destinations can boast the **types of cultural or adventurous experiences** this group is seeking, many have not taken **appropriate steps to fully develop their offerings** or highlight them in marketing.



Part 3: Use the right communication channels and character of products to bring success

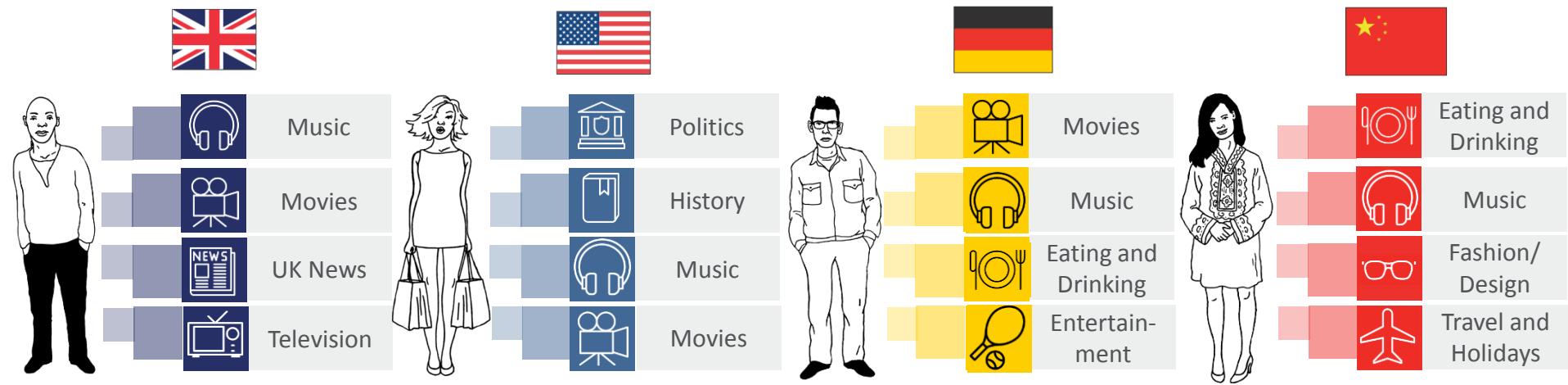


Millennials are demanding customers. They want to explore new pathways and have rich experiences on their holidays.

However, they don't want to be parted from their beloved technology wherever they go.



Focus on the hobbies and interests of your target group



Interests and hobbies that seem generic at first sight might be your key to attract this generation. Offer them content and activities that relate to the things they enjoy spending time doing. For example film locations all around the globe have attracted thousands of young people seeking the special places they recognise.



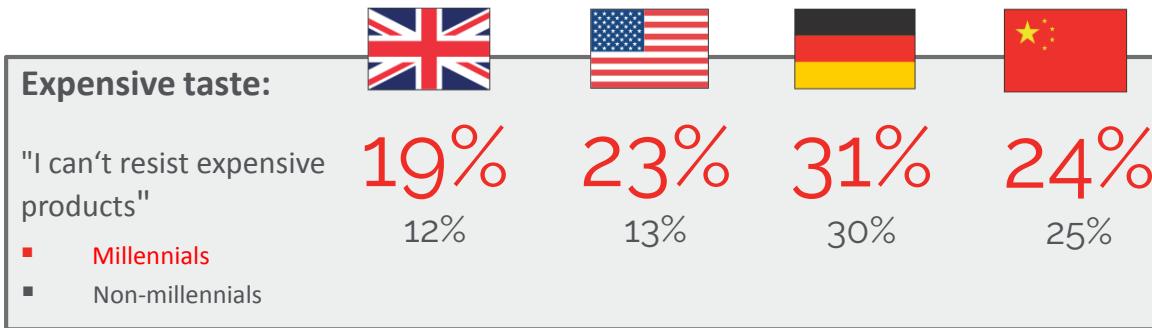
This type of analysis can be extended for different countries, sectors, brands or audience segments.
We can show you which movies and events your millennials are enthusiastic about.

For information see <https://yougov.co.uk/find-solutions/profiles/>

Your target group has high expectations

Demographic data shows that millennials are quite **different to the generations before**: they **invest far more time and money in their education**, due to the elevated standards in the labour market.

But their **efforts pay off**: considering that millennials have had less time in work than older generations, **their income is relatively high** – which makes them **valuable, but also demanding customers**.



On the other hand millennials are the first generation to live in world of **globalised individualism**. For Millennials the World has become borderless – they are travelling further and further to places their parents were never able to go.



Focus on their channels, activities and habits

Compared to older generations, US millennials are particularly interested in mobile apps, video games, sex & relationships and beauty care

One in three UK millennials say online advertising is the main channel to grab their attention, compared to one in five in other generations.



Millennials in China choose mobile adverts as the main channel to be targeted on.

Chinese millennials enjoy singing, playing computer games, photography and fishing far more than people of other generations

In Germany, millennials are more interested in movies, eating and drinking and food

In Great Britain, the main differences are interest in video games, sex & relationships, movies and mobile apps

In order to reach the millennials in their everyday life and especially when they are on holiday, you need to focus on the right channels; what works for older generations does not necessarily apply to the younger generation when it comes to getting their attention with advertising.

Adapt your messages and activities to the needs of millennials

▪ Millennials



“I like to surround myself with a diverse range of cultures and ideas.” (67%/53%)



“Having emojis in text helps people understand each other better.” (58%/33%)

“I often order takeaways.” (38%/18%)



“I’d rather receive a text than a phone call.” (67%/42%)



“I like to stand out.” (41%/22%)

“Electric cars are clearly the way of the future.” (59%/47%)

▪ Non-millennials



“To me it is important to achieve a high professional position.” (63%/43%)



“I like to get input from other people when making decisions.” (73%/57%)

“I always check product reviews before buying something.” (78%/71%)

“I am willing to pay more for luxury brands.” (71%/57%)



“My opinions are often changed or influenced by peers.” (47%/33%)

“I tend to make impulsive purchases.” (45%/35%)

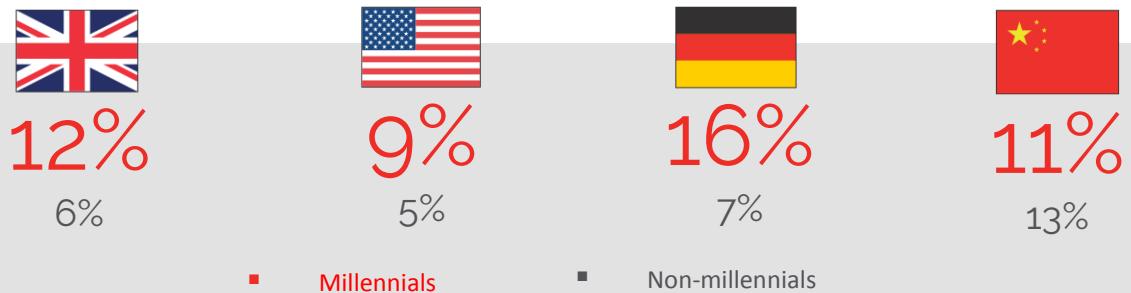
“I generally shop by going aisle to aisle rather than knowing ahead of time what I will buy.” (51%/46%)

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Using new technologies will attract millennials

Early Adopter:

“I’m always keen to use new technology products as soon as they enter the market”



Their desire to be the first to use new technologies can be used for innovative communication strategies. Millennials are far beyond only using stationary internet when travelling – they are connected all the time when abroad, using continuous streaming of information on places, people and news. You can be successful with technologies that have only recently entered the market. These will reach millennials better than any other group as they are more likely to call themselves “Early Adopters”. An example is VR-Technology – impressions and adventures from your destination can be delivered in advance, increasing the likelihood that they will develop a desire to experience the real thing.

These brands do well with the millennials, so look for tie-ups



benefit
SAN FRANCISCO



L'ORÉAL
PARIS

PlayStation®

Nintendo®

XBOX



★ Heineken®



SEPHORA

ULTA®
BEAUTY

Clean & Clear.

Nintendo®

Pixel



Naked.
JUICE



Balea^{dm}

GARNIER

bebe

PlayStation®

b beats. by dr. dre.

Nintendo®

VELTINS V+

AriZona

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BECK'S



菅式美容
KAN'S BEAUTY

CARSLAN

Mentholatum

SONY.

iPod

b beats. by dr. dre.

Cestbon
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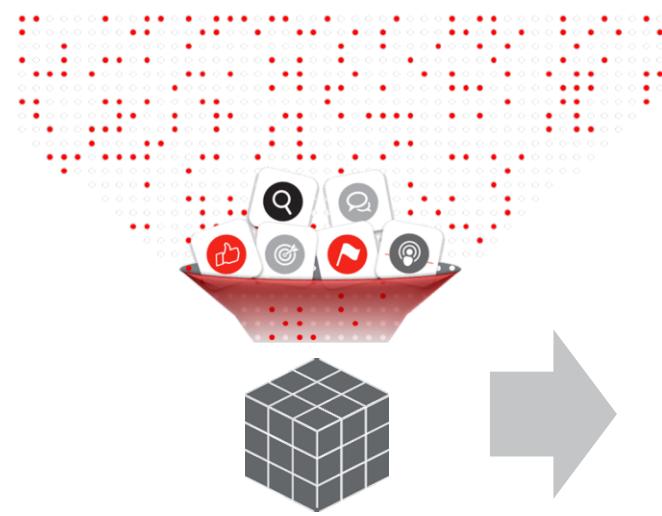
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Recommendations

- 1 Recognise that millennials are looking for a different sort of travel experience than older generations—more individualised, more adventurous and culture-oriented.
- 2 Understand that they like to plan and book differently from older generations; take advantage of this by harnessing new booking platforms and methods.
- 3 Capture the interests of millennials by encouraging or creating experiences that relate to their hobbies, particularly around music, movies, eating and drinking.
- 4 Take advantage of their affinity for online (and especially mobile) by enabling access to the best of your offerings through these media.
- 5 Become engaged in new technologies such as Virtual and Augmented Reality – deliver a new horizon to your young target group and you will connect with them on a whole new level.

YouGov Reports – How it works



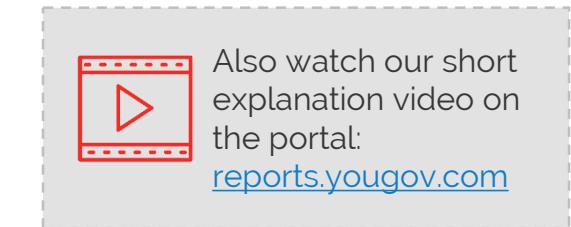
YouGov has a panel of five million people worldwide who provide us with **live, continuous streams of information**. But we don't just collect data, we **connect data**.

At our heart is the "**YouGov Cube**", our database that allows us to connect hundreds of thousands of data points about the attitudes and behaviours of our panellists.



YouGov Reports are how we bring the "Cube" to life – providing in-depth looks at specific topics.

Based on our connected data, Reports provide immediate insights about topics that are relevant for your business – and are presented in a simple and engaging way



YouGov Profiles
YouGov BrandIndex
YouGov Omnibus

Furthermore, using our connected data products – YouGov Profiles, YouGov BrandIndex or YouGov Omnibus – you can tailor a Report to your needs.

You can go deeper into areas. You can change its focus to enrich its insights.

This is a truly new way of doing research, and brings you a better understanding of your markets than ever before.

About YouGov Reports

YouGov Reports

“Understand the big trends and the granular details of a sector or subject.”



YouGov Reports are the way that YouGov talks to the world by bringing the YouGov Cube to life with highly visual and simple to understand PowerPoint reports packed full of real business recommendations.

These reports are built using YouGov Profiles and YouGov BrandIndex data. Each report analyses data from the YouGov Cube by examining a central hypothesis, exploring the data in-depth.

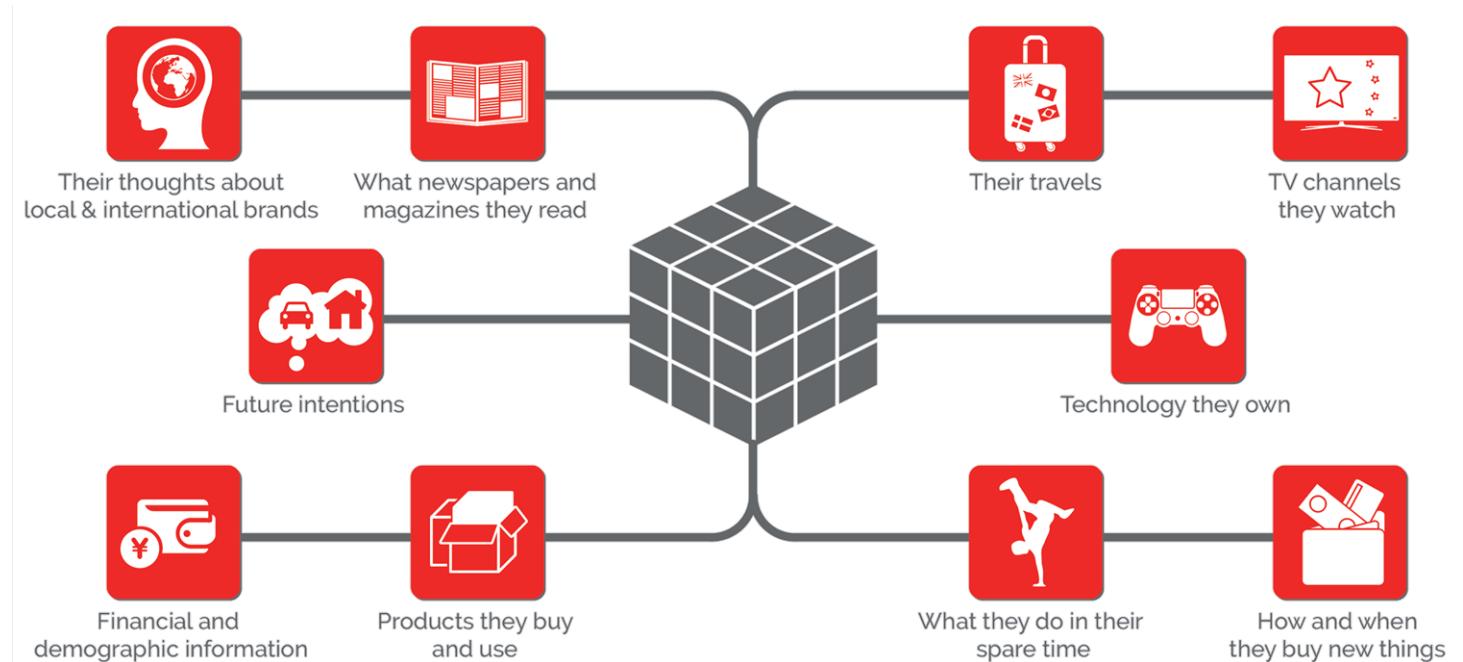


Results are presented in a simple and engaging way and always answer “How to?” “Why?” or “What?” and challenge clients’ assumptions. Further analysis is always possible for clients by using the YouGov Profiles and BrandIndex tools.

About YouGov Profiles

YouGov Profiles

- Profiles is our segmentation and media planning tool for agencies and brands.
- It holds **190,000 variables** collected from our most active **250,000 panellists** in the UK. We have the same connected dataset in the US for over **200,000 panellists** with **200,000 variables**, and also in Germany with **100,000 data points** for over **55,000 panellists**.



About YouGov BrandIndex

YouGovBrandIndex



- YouGov BrandIndex involves tracking the **public perception of brands across the world everyday.**
- Want to find out what the world thinks about your brand? BrandIndex is the authoritative measure of brand perception, monitoring **thousands of brands across dozens of sectors.**
- We interview **thousands of consumers every day**, yielding over 2.5 million interviews a year. BrandIndex operates at **National and International levels**, allowing you to track brand perception in one country, compare across multiple countries or monitor a global picture.
- Our data is **updated daily** and **instantly available** to you through the BrandIndex reporting tool.
- This makes it easy for you to keep an eye on your brand's health and **immediately act on any changes in perception**. BrandIndex provides the **critical insights** that are necessary for **fast and informed decision-making**.

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