



# Project 18-40: Understanding the Younger Traveller

BLUE SAIL▶

56°  
DEGREE  
INSIGHT

# The Generations

Greatest Generation 1901-1924

Silent Generation 1925-1945

Baby Boomers 1946-1964

Generation X 1965-1979

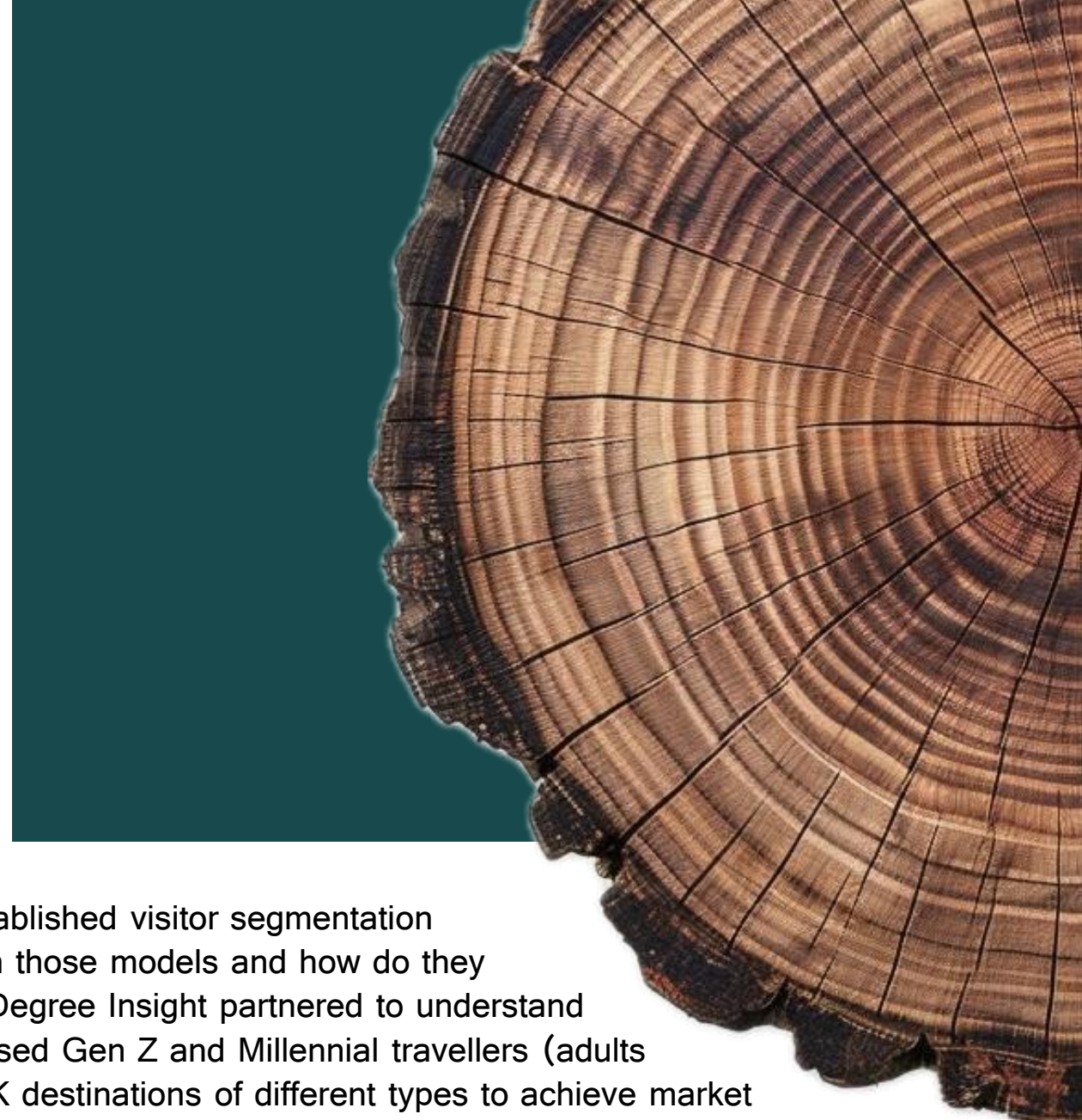
**Millennials 1980- 1994**

**Generation Z 1995 – 2009**

Generation Alpha 2010 -



For some time, we've been noticing a bit of a gap in some of the established visitor segmentation models we often use in our client work – where are the youngsters in those models and how do they feel about travelling in the UK? So, in late 2023, Blue Sail and 56 Degree Insight partnered to understand more about the characteristics, motivations and behaviours of UK-based Gen Z and Millennial travellers (adults aged 18-40). Our goal was to identify best prospect segments for UK destinations of different types to achieve market growth. In this document, you can read about the segments we have developed, what their travel behaviours are and how likely they are to travel in the UK.





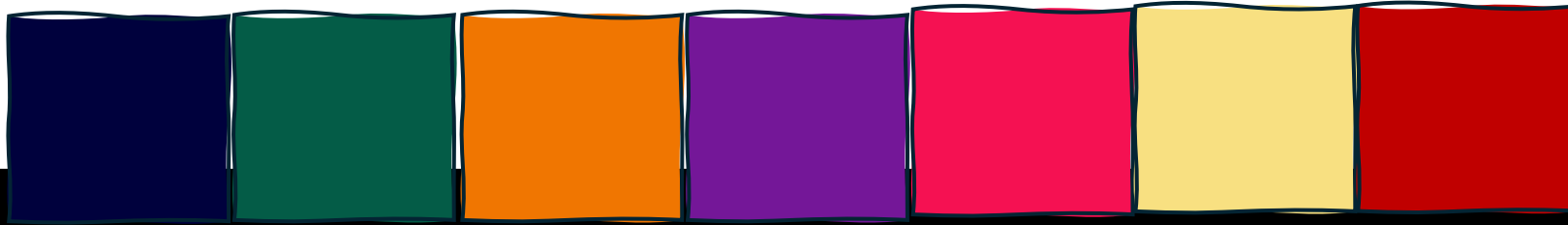
# Research Approach

So, what did we do?

In Q4 of 2023, we undertook a detailed 15-minute online quantitative survey:

- 2,000 UK-based adults representative of the population aged 18-40
- Sampling only from quality assured online panels
- A representative spread by age (40% Gen Z / 60% Millennials) and other key demographics including sex, lifestyle and ethnicity
- Representative by place of residence across the UK with coverage across England, Scotland, Wales and Northern Ireland
- Statistical analysis undertaken to identify and size discrete segments which describe the UK travel market among Gen Z and Millennials

In summary – a fully comprehensive and robust analysis of the 18-40 market



# Headline Findings

Overall, there is a lot for UK destinations to be positive about when it comes to the 18-40s – they see the UK as worth exploring, especially for short breaks


### Attitudes to UK trips

- 73% say there is more to discover than you think
- 72% think it's great for active outdoors
- 65% think it's convenient
- 58% think it's best for short breaks



### UK trips in next 2 yrs

- 57% holiday (4-14 nights)
- 54% short break
- 49% VFR
- 42% business

A close-up photograph of a white ceramic cup filled with a latte, featuring a heart-shaped latte art design. In the foreground, a white plate holds two slices of toast topped with mashed avocado and a perfectly poached egg, garnished with a sprinkle of red chili flakes and black pepper. The background is a warm, out-of-focus wooden surface.

But do they all conform to the stereotypes of their generation?

### **Climate Change:**

- 74% see climate change as a major issue...
- but...this doesn't always influence travel choices

### **Experience Economy:**

- 66% say memorable experiences are more important than possessions...
- but...34% agree that money & possessions are seen as signifiers of success

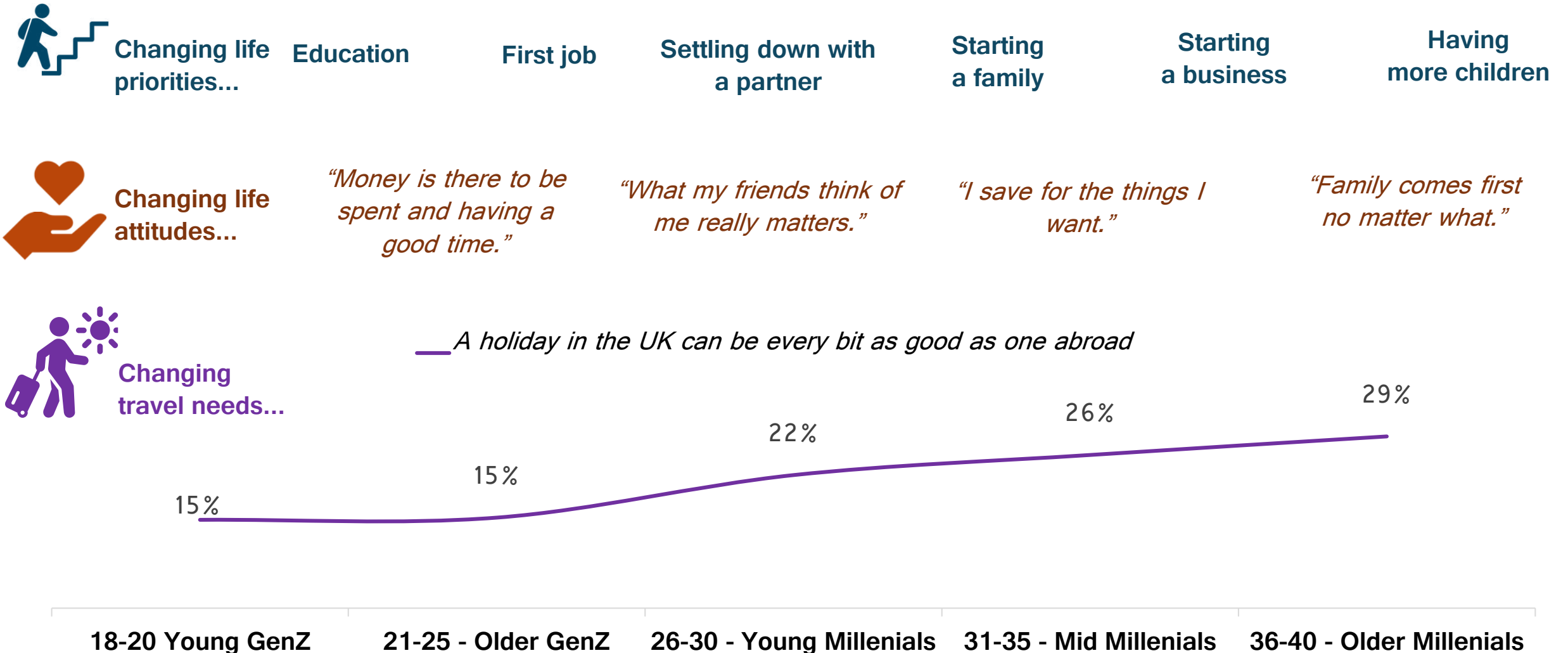
### **Attitudes To Money:**

63% say they're savers...

- but...54% are also spenders and 52% spend on travel as other big purchases (like a house) are unaffordable
- and...cost of living is seen as the biggest barrier to travel over the next couple of years

Whilst travel behaviour is driven by supporting mental health & wellbeing, immersive experiences and exploring while young, this is a rapidly changing time of their lives - over the next 5 years they want to develop their careers as well as their relationships and families.

The period of greatest change in our lives is between the ages of 18 and 40. Big shifts in life priorities and attitudes drive changing travel needs.



30 seems to be a milestone - job, income, tenure and children all drive attitudes and behaviours – and this is often when we see a shift in travel attitudes and behaviours, providing an opportunity for destinations to refine their messaging and ‘get in’ early.

- Social media is the main source of travel inspiration for GenZ (TikTok & Instagram)
- International travel aspirations highest for those aged 26-30
- The importance of scenery, food & drink and a warm welcome increases during mid 20s
- The importance of the environment and wellbeing peaks for those in early 30s
- Seaside more important to the oldest



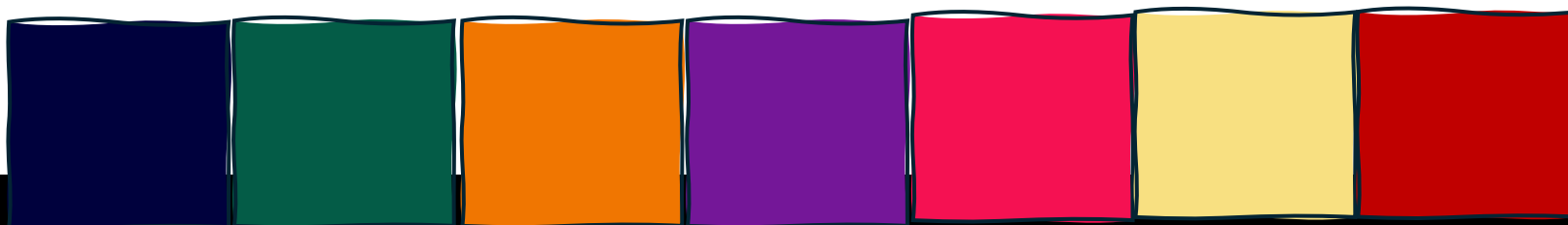
But age does not tell the full story...

18-40 year-olds are not a homogenous group when it comes to travel.

There are marked differences and nuances in attitudes, behaviour and demographics.

This has enabled us to create a segmentation solution offering deeper insight and understanding.





# The Segments



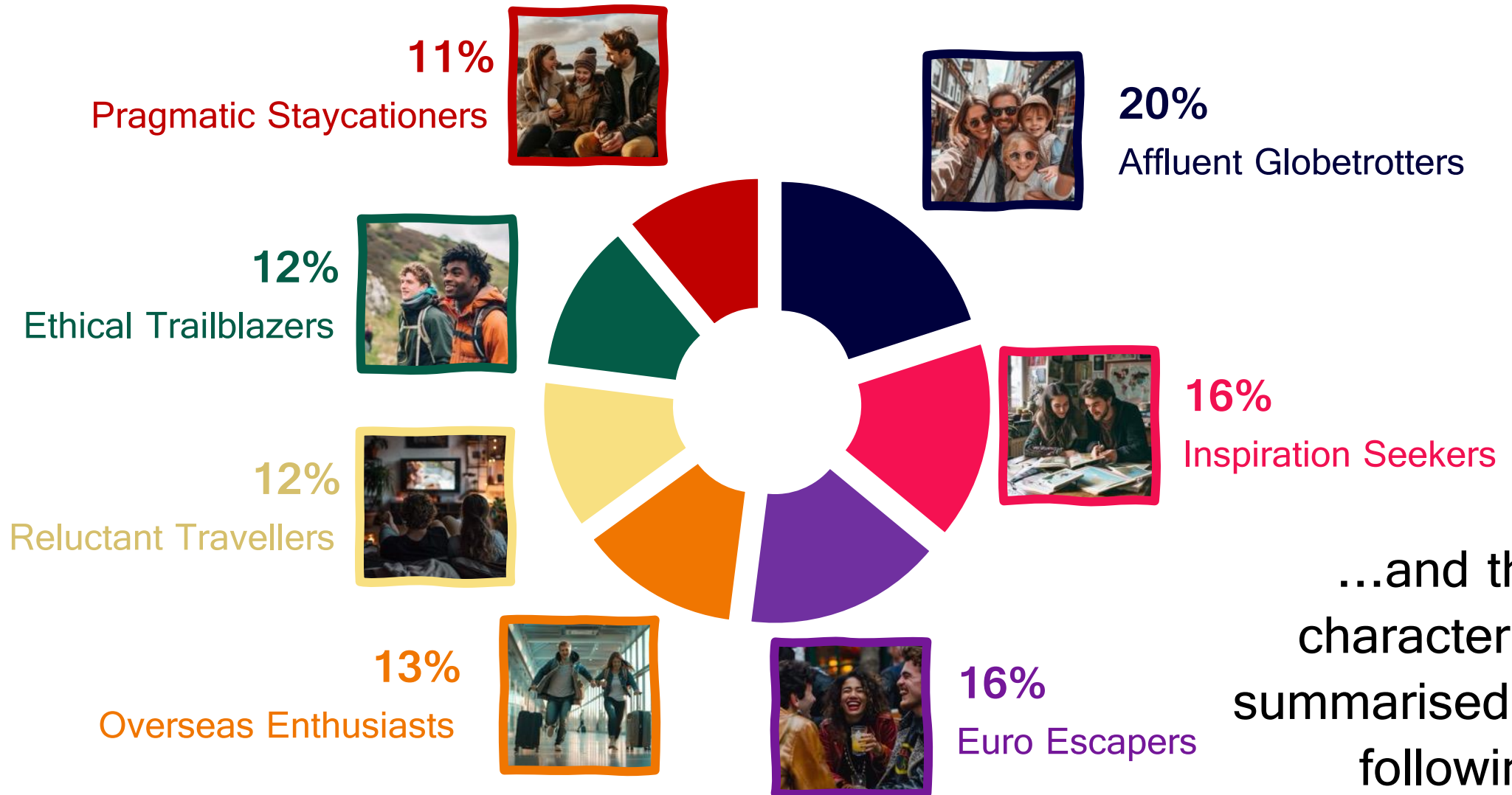
# Segmentation Approach

Segments were identified using a statistical approach called Latent Class Analysis.

Latent Class Analysis is a measurement model in which individuals are classified into mutually exclusive and exhaustive types based on their pattern of answers on a set of categorical indicator variables.

This segmentation used input variables including demographics (age, financial status and education), attitudes toward travel in general and attitudes towards holidays and breaks in the UK.

Our analysis revealed 7 segments...



...and their main characteristics are summarised over the following pages

# Affluent Globetrotters

## Who are we?

Primarily in our 30s, affluent, often married with children, highly educated, over-index in Southeast England or London.

We are sociable, adventurous, and enjoy showing success through our material possessions and on social media.

## What do we like?

Holidays are extremely important to us and we take lots. We're regular international travellers, mostly travelling with family. We are looking for adventure and challenge and are less interested in the environmental impact of our travel choices.

## What about the UK?

While we take lots of long-haul holidays we also value domestic trips. We're interested if it's exciting - show us something 'new'! We might extend a business trip in order to explore and we love to try unique accommodation - glamping or a quirky AirBnB - bring it on!



# Inspiration Seekers

## Who are we?

We're mostly in our mid-20s and coupled up. Some have children, some don't. We are earning a moderate income but we need to save for luxuries.

We value intellectual growth and are not materialistic. Developing our careers and settling down are top of our minds.

## What do we like?

Holidays are pretty important to us – for our wellbeing and as an opportunity to experience different destinations. We enjoy cultural experiences and outdoor activities. We'd love to explore further afield but for now our sights are set within Europe. We're worried about climate change and that can influence our choices.

## What about the UK?

A UK break can be just as good as an overseas trip and there's more to discover here than you might think! We're open to learning about history, visiting music or sports events, spending time in nature, engaging in outdoor activities and visiting the seaside. Inspire us!



# Euro Escapers

## Who are we?

We're mostly young, 18-25, diverse in terms of lifestyle, and often students or in an early career stage. Most of us live in rented accommodation or rent free with family. It's a stretch to afford luxuries and we're more concerned with getting our foot on the career ladder than with climate change.

## What do we like?

Holidays are important for our wellbeing but we want to connect with friends and enjoy a few local beers together more than soaking up the history or culture.

## What about the UK?

We want to travel whilst young and for us that means Europe! We're not interested in UK trips and don't take many. Escaping routine and spending time with friends or partners are likely to be the only motivations for considering a UK trip and we'd be more likely to enjoy a city break.



# Overseas Enthusiasts

## Who are we?

We're typically in our mid-20s, our careers are important and give us a decent income, and we're just starting to settle down pre - family.

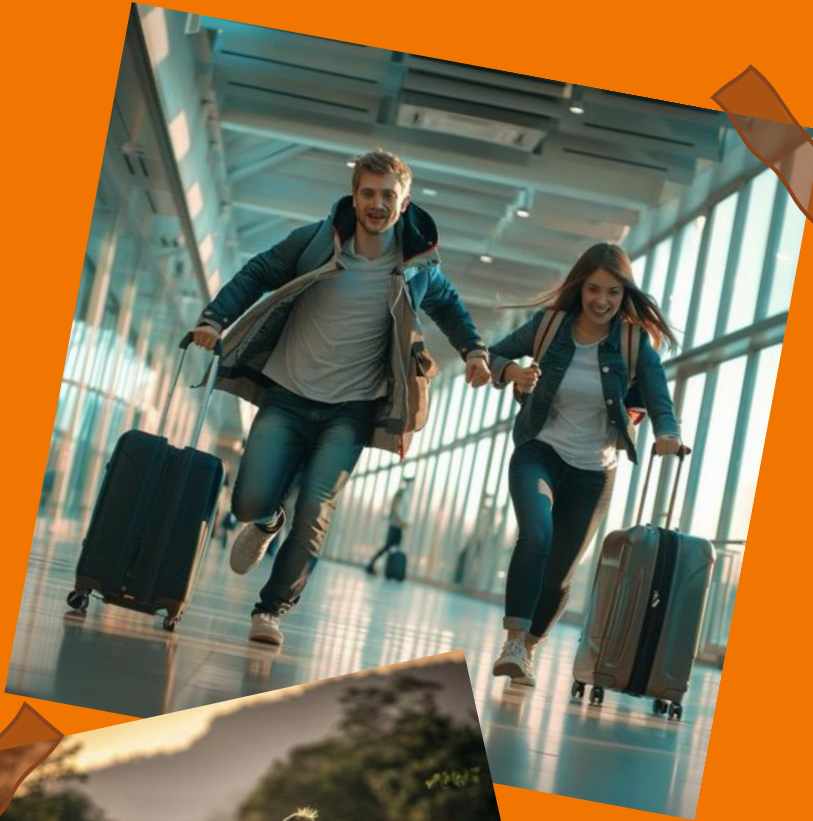
We're pretty reserved and are more focused on settling down and developing our careers than on money or possessions. We're not too concerned about climate change.

## What do we like?

Holidays are important and we want to travel whilst young – we want to experience distinctive cultures, enjoy nightlife and connect with friends and family.

## What about the UK?

Relaxing and spending time outdoors are less important to us than learning about history and experiencing a different culture - UK holidays are not as good as holidays abroad – we'd much prefer to get away! We might add some time to explore onto a business trip.



# Reluctant Travellers

## Who are we?

We're the youngest segment, childfree and largely under 25. We vary in our employment and living situations, but many of us are living with parents.

## What do we like?

Holidays aren't so important to us - we're just not interested!

## What about the UK?

We might travel occasionally to visit friends and family or for an event but otherwise we tend to stay at home.



# Ethical Trailblazers

## Who are we?

We're young, many of us 18-20, most of us are working full time, and many of us house sharing. Some of us have children. We're environmentally and socially conscious and it's important to us to make positive impacts.

We're adventurous and spontaneous – drawn to people and things which stand out from the crowd.

## What do we like?

Holidays are very important, and we will spend on holidays whilst other major purchases are out of reach.

We want authentic, sustainable experiences that offer insights into local life and culture.

## What about the UK?

We take lots of UK short breaks of all kinds – we enjoy cities, outdoor activity, time in nature, enjoying nightlife. We enjoy opportunities to connect with friends and local communities.



# Pragmatic Staycationers

## Who are we?

We're a diverse mix across age groups, and many of us are on lower incomes and face financial struggles.

Many of us have children and we tend to be family-oriented and conservative, valuing simple pleasures over novelty or material possessions.

## What do we like?

We're not adventurous travellers but we appreciate getting away from it all for health and wellbeing. We enjoy attractive scenery but are less interested in culture, shopping or nightlife.

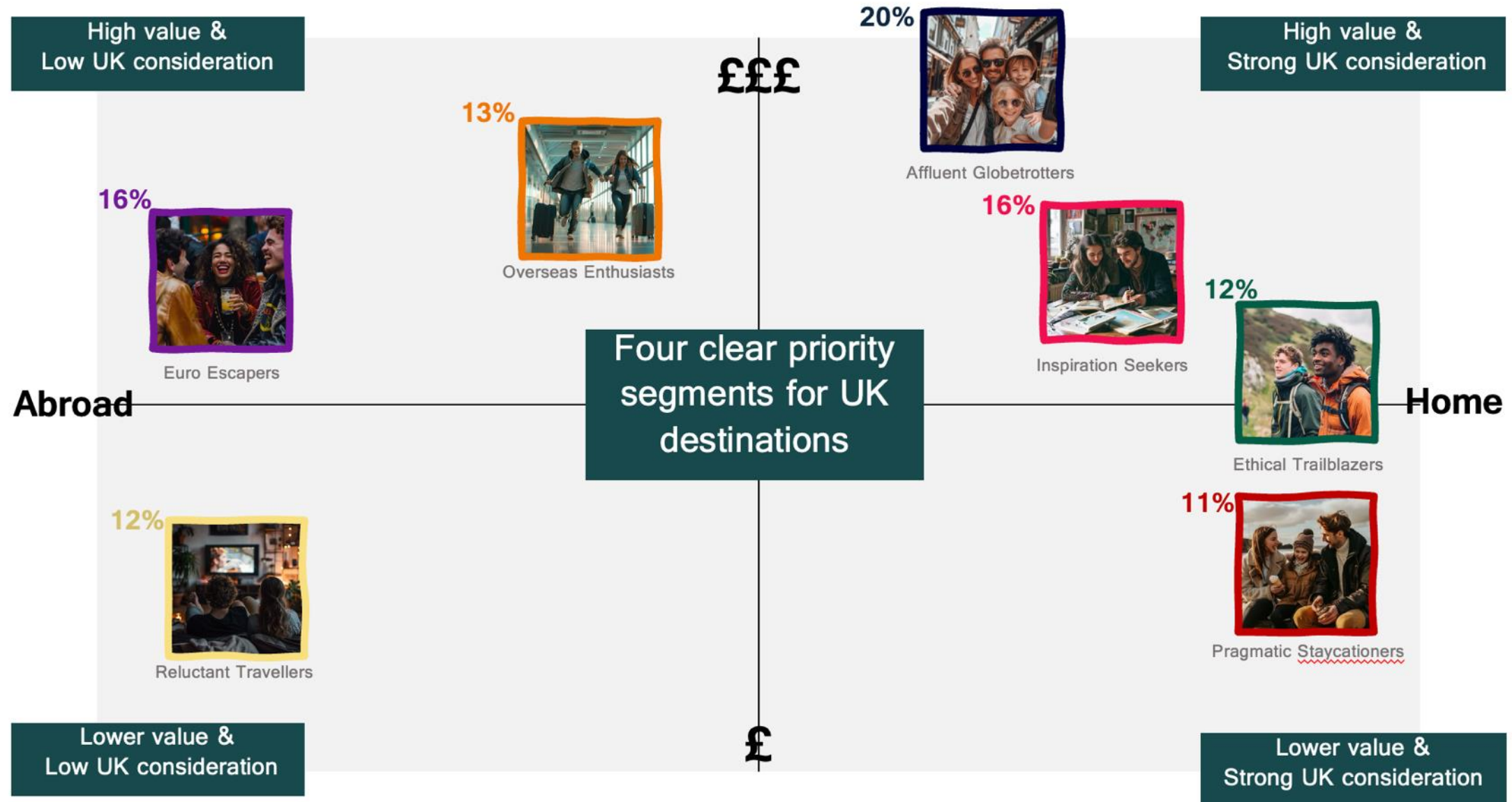
## What about the UK?

We love traditional UK holiday destinations like seaside towns and the countryside.

Getting away from it all and relaxing with our families is more important than seeking out cultural or historic experiences.



Each segment offers potential for the UK tourism industry. Destination management and marketing strategies should consider the options and implications.





This analysis gives a flavour of our segmentation – but it's only the tip of the iceberg...

### Contact us to discuss:

- Obtaining more detail
- Helping you segment your own database
- Workshopping these segments with you
- Applying these findings to wider work – DMPs, marketing strategies, product development

[jim.eccleston@56degreeinsight.com](mailto:jim.eccleston@56degreeinsight.com)

[laura.wakelin@bluesail.com](mailto:laura.wakelin@bluesail.com)





# Project 18-40: Understanding the Younger Traveller