



Insight Department: A fresh perspective

Exploring Scotland through younger eyes

Topic paper
March 2020

 Visit
Scotland | Alba™

Welcome

DEBUNKING THE MILLENNIAL MYTH

The ‘Millennial’ generation is one of the largest demographic groupings in history – but just who are Millennials, what are they looking for when they travel, and what can Scotland offer that meets their specific needs?

Although dating is not precise, most researchers regard Millennials (also referred to as ‘Generation Y’) as people born anywhere from the early 1980s right up to the early 2000s. **Therefore, in 2020, this represents a group ranging in age from around 18 to 36 years.**

However, from a tourism marketing perspective, it’s important to remember that age alone does not create a uniform group with a single, common set of values and behaviours. To fully understand what makes this ‘Millennial’ market tick, we also need to take into account experience, maturity and circumstance – while these factors can be influenced by age, they are not specific to it. Indeed, within this relatively wide age range we find an equally wide cross-section of life and career stages, levels of disposable income, amounts of free time, personal interests and attitudes.

In other words, while this group may be a single (Millennial) generation, they are all individuals too! In this Topic Paper, therefore, we refer to them simply as ‘young’ or ‘younger’.

USING INSIGHT TO INFORM OUR TOURISM OFFERING

In 2017, we published a topic paper, *Millennial Travellers*, to highlight the core and common set of traits and triggers that differentiated ‘Millennials’ from preceding and future generations, and were of particular relevance to tourism. The key insights from our earlier paper are highlighted in Appendix 1, at the end of this Topic Paper.

In 2018, Scotland’s Year of Young People, we commissioned research agency, Kubi Kalloo, to add further depths to our knowledge of this younger generation – specifically, their travel motivations and behaviours – to provide us with a more detailed understanding of their commonalities and differences and, importantly, what those mean for Scottish tourism.

In this 2020 paper, *A fresh perspective*, we build on *Millennial Travellers* by interpreting key findings from our research to help everyone involved in tourism in Scotland tap into the younger market and position Scotland as the ideal holiday or short-break destination for younger audiences.

Overview

- Not all young people are the same. They have different beliefs and values, and age alone is not a determinant of behaviour – experience and maturity matter too.
- For the 16 to 36 year old generation, this is a transitional life stage displaying more change dynamics than almost any other generation, including career development, housing needs and the arrival of children.
- Younger people seek both escapism and reassurance in many forms. They have a desire to stand out... but also a desire to fit in, especially at the younger end of the age group, as their true 'sense of self' develops.
- Life is about achieving a balance so that experiences can be maximised and, for younger people, brands that share their values can help to elevate their social worth.

Critical factors for younger people's travel journeys are:



New
discovering things
for the first time



Value for money
income may not match the
desire for new experiences



Braggable
being seen as 'ahead of
the curve' is important



Unique
seeking out experiences that
are specific to destinations

Younger visitors view Scotland in much the same way as all domestic tourists - they are attracted by the natural beauty of the landscape, the buzz and culture of the cities, the opportunity for outdoor adventure and the reputation of a warm welcome. However, they are put off by a perceived lack of excitement and 'talkability' as well as a lack of awareness of destinations beyond the typical and of course the weather!

Source: VisitScotland Young People Research, Kubi Kalloo (2018)



Key Statistics



In 2018, the overall 16-34 year old market generated **4 million trips**, **17.2 million nights** and **£1.253bn** in Scotland. They spent an average **£310** per trip, **£73** per night, and stayed in Scotland for **4.3 nights** (GBTS, IPS).



Domestic 16-34 year old visitors to Scotland generated **2.8 million trips**, **8.7 million nights** and **£658m** in expenditure in 2018. On average, these young domestic visitors spent **£234** per trip, **£75** per night, and stayed in Scotland for **3.1 nights** in 2018 (GBTS).



Overseas 16-34 year old visitors to Scotland generated **1.2 million trips**, **8.5 million nights** and **£595m** in expenditure in 2018. On average, these young overseas visitors spent **£487** per trip, **£70** per night, and stayed in Scotland for **6.9 nights** in 2018 (IPS).

Sources: Great Britain Tourism Survey (GBTS) and the International Passenger Survey (IPS)



Exploring commonalities and differences



year of young people
bliadhna na h-òigridh
2018

As part of the Year of Young People 2018, VisitScotland commissioned research to further explore the younger generation, specifically looking at different life stages within the 18-36 years old demographic, and including those with and without children.

Our qualitative research was UK-wide and comprised both an online forum and face-to-face workshops in Edinburgh and London, with an equal gender balance and an equal split across the age demographic for those with children (aged between 5 and 12) and those without. All participants agreed that travel was important to their lives and that they took an active role in planning holidays. In addition, everyone participating either planned to take a trip within the UK in the next three months or had taken one in the last six months.

Key findings from the research revealed a number of commonalities (the same...) within this younger generation as well as a number of unique dynamics (... but different).

The same...

This age group was broadly defined as 'a young cutting-edge generation' who are part of a social evolution and share the following perspectives:

Life is about balance to maximise experiences

- Extremes are no longer the norm – there's a balance between constraint and indulgence
- Young parents want to teach their children about real life – 'Go and get dirty!'
- Memorable, unique and once-in-a-lifetime experience are sought after

There's a desire to stand out...

- This is a competitive generation, led by the 'cult of first' and a desire to influence others
- They feel a need to elevate their social positioning and 'bragging rights' are key
- Exclusivity and reward are important – unique access and feeling valued are highly prized

... and also a desire to fit in

- Image is everything – there's high social awareness as the sense of self develops
- 'Collective norming' reflects a need for a sense of social belonging
- Younger people are careful of what they communicate to the world, directly and indirectly

Brands that share values can help to elevate social worth

- Guilt-free brands with a strong story are liberating and appealing
- Younger people embrace diversity and practice absolute equality as much as they can
- Brands that feel unique, original and offer 'truly authentic' experiences will win

... but different

"Not all Young People are the same. They are at different ages and life stages; they have different values and beliefs and these may be continuously challenged in a rapidly changing world."

TOPIC PAPER: EXPLORING SCOTLAND THROUGH YOUNGER EYES

However, there are more unique dynamics in this age group than in almost any other generation, reflecting that this is a key transitional life stage, particularly as the youngest end move from childhood to adulthood.

The four key 'change' dynamics that our research highlighted include:

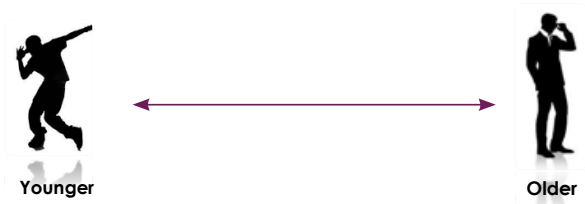
- Employment versus career – new ways to measure 'success'
- Tensions in finding the ideal living environment
- New experiences – love, nesting, children – present significant lifestyle shifts
- Both escapism and reassurance are sought in many forms

Source: VisitScotland Young People Research, Kubi Kalloo (2018)



Is age more than a number?

Although age alone is not a key determinant in behaviour – experience and maturity play their part too – it is a key characteristic that helps to explain important differences and shifts in attitude. Our research indicates broad patterns of difference between those at the younger end of this generation and those at the older end.



The younger end of this demographic are often dealing with the contradictory forces of both wanting to belong and yet craving independence while their true sense of self is developing. As such, the characteristics that this group shares may include:

- more mainstream attitudes and less certainty around choices
- more accepting of peer influence but less consciously so
- more tribal in outlook, defining themselves through established codes
- experiencing more firsts – new experiences are the norm at this life stage
- ingesting culture and consuming trends and opinions, then recreating them as their own
- easily influenced and open to new trends and beliefs – fickle!
- rejecting preceding generations to forge their own path

Those at the older end of the demographic are more likely to have established a stronger sense of self. New relationships, a sense of success and new opportunities mean they are less dependent on peers. This group's perspective is likely to have become more pragmatic and also more open, reflecting both their increased responsibilities and also their growth in self-confidence. The characteristics that they share may include:

- more disposable income so more experimentation with brands and experiences
- more responsibilities and the development of their own rules or guidelines to provide structure and balance (particularly true of those with children)
- developing and sharing cultural ideas, taking as much pride in the sharing as in the knowledge building
- more consistent in likes and dislikes and in sources of information and inspiration used

Tales of the unexpected

Marketing Scotland effectively as a desirable destination for a younger market means opening our eyes to what this generation is really like, rather than basing our understanding on assumptions that may now be outdated. The world is a rapidly changing place and our tourism marketing needs to be as agile as our young audience to capture their interest.

Digital natives not digital slaves

While the 18-36 year old generation is the first to grow up with digital technology as the norm, most do not allow this to define them and many 'young people' are 'too old' for some of the newest digital trends. Our research revealed that while many may 'follow' tourism organisations, this is often more passive than active. Individual influencers are not key, but thematic impact, built up over time with a focus on experiences that are new, unique and good value, create a cumulative impact that's personally tailored and crafted through navigation and filtering.



Filtering in, filtering out

We live in an age of information at our fingertips and services like Spotify, Netflix and Amazon not only allow rapid filtering to reach a destination, but create new navigation paths that facilitate discovery. This is both exciting and fulfilling and, for younger people, means that as well as 'filtering out' information, they will often 'filter in' to explore new options and possibilities. A search for mini-break in Manchester could turn into a weekend away in Glasgow!



Identity with diversity

TV shows such as *Who Do You Think You Are?* and online tools such as Ancestry DNA tap into a desire to learn more about our cultural identity. For this younger demographic in particular, this is inclusive of diversity and reflects an acceptance that the past leaves room for changing ethnicity, geography and values. Young parents who participated in our research were particularly keen that their children know about their cultural heritage – an ambition that's as much to do with wanting to bring children up 'properly' as a nostalgic desire to revisit childhood places.



An appetite for ambiguity

For younger people, many traditional binary ideas are broken down. There is consequently an increased appetite for ambiguity in products and services – phones act as cameras and a bicycle repair shop may double as a juice bar! When it comes to travel, tourism marketing should bear in mind that this generation is on a mission to find multiple experiences that can collide in one trip.

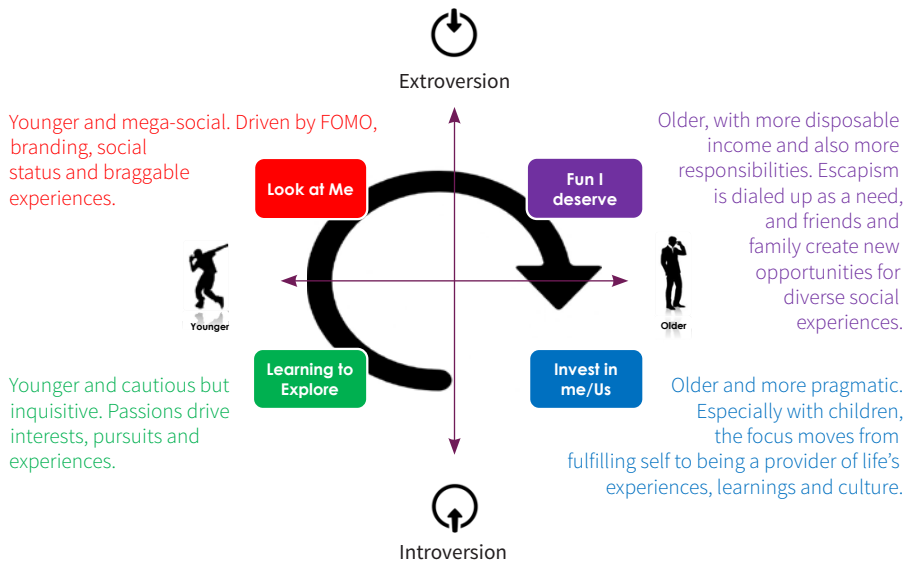


From ‘look at me’ to ‘invest in us’

As well as using age to explore attitudinal differences in the younger generation, it's also helpful to add a further layer that addresses different life stage needs. While the terms ‘extrovert’ and ‘introvert’ are often misused as shorthand for ‘boisterous’ or ‘quiet’, in this context they provide a useful further dimension to the way we understand and interpret the behaviour of young people.

Energy, ideas and confidence are sourced from the outside world through opinions and ideas of others.

- more social – connectivity provides reassurance and certainty
- cult of first – important to be seen as a leader and influencer
- more risk averse – conversely, safety in being seen as ‘one of the gang’



More assured in own values and opinions and less dependent on the views and opinions of others. Energy comes from within.

- less reliant on social opinion and less dependent on mainstream social media platforms
- more likely to be inspired by genuine interest than by popular opinion
- quieter, but often very influential in choices made

What do younger people look for in a mini break?

Mini-breaks provide an ideal opportunity for all travellers to explore new places and absorb new experiences and cultures (whether that's living like a local or staying in a boutique hotel, going off the beaten track or exploring an iconic city) and then broadcast their discoveries.

How does choosing a mini-break destination translate for the 18-36 year old market?

THE YOUNG TRAVELLER JOURNEY

INSPIRATION

Seek inspiration from like-minded people online first (like and comment on social media posts) before seeking external views (talk to friends, family and colleagues, watch films and TV, read books and adverts, consult the experts via search engines)



PLANNING

Start planning by looking for reassurance on value for money (investigate online reviews, qualify findings by asking friends and social media contacts) before booking (filter through travel and accommodation brands, connect and commit)



ON HOLIDAY

On holiday, make the most of everything (read inflight magazines and hotel brochures, explore sights and sites online, wander and discover) to maximise the whole experience (talk to locals and staff, get advice from tourist information centres, impress close friends via social media)



POST HOLIDAY

After the holiday, sell in the experience and reinforce the memories (document on Facebook and broadcast on Instagram) by creating conversations and stories, and adapting social status (advise the wider world through tripadvisor, share stories with friends, families and colleagues and create photo and gift products)

What factors are critical to that journey?

	<p>NEW</p> <p>Originality for young travellers (and, for the youngest of them, remember everything is a first!) means providing new opportunities, or reviving and refreshing existing traditions and brands, so that young travellers feel they're discovering them for the first time. Carving a new world for future generations is important to this generation too.</p> <p>"I'm never really the first to do anything, but it's important it looks like you are – you don't want to be a sheep!" Early 20s, without children</p>
	<p>VALUE FOR MONEY</p> <p>Affordability is key, particularly when income may not match the desire for new experiences. Young travellers are adept at seeking out deals and signing up to offer that keep them 'in the know' – those without children can be agile and spontaneous, able to take advantage of last-minute opportunities.</p> <p>"It was out of season so it was really quiet. It was actually really nice... to hang out with each other and switch off." 25-35 year old, without children</p>
	<p>BRAGGABLE</p> <p>Being seen as 'ahead of the curve' is important to young travellers, allowing them to feel like a leader rather than a follower. Reframing an experience – staying in a log cabin rather than a hotel for example – means 'bragging rights' are rooted in a genuinely differentiated experience rather than simply ticking off a destination.</p> <p>"I tend not to post these things on social media, but I can't help wanting to tell everyone if it's a really amazing experience!" 25-35 year old, with children</p>
	<p>UNIQUE</p> <p>Younger people want a deeper level of involvement when they travel – often seeking out experiences that may not be particularly unusual, but are different to normal behaviour and different from previous (and future) holidays because they are unique to the destination.</p> <p>"I don't want to stay in a hotel chain, so I tend to use Air BnB. Where you stay is part of feeling the energy of the place." Early 20s, without children</p>

Sharing Scotland's story with a younger audience

Not surprisingly, young travellers view Scotland in much the same way as all domestic tourists. They are attracted by the **natural beauty of our landscape** and by the **buzz and culture of our cities**; by the opportunities we offer for **outdoor adventure** and by our reputation for providing a **warm welcome**. But they are also put off by a perceived lack of excitement and 'talkability' compared to European destinations, a lack of awareness of locations beyond typical and traditional destinations, and, of course, 'the weather'...

Younger travellers are fickle and it's difficult to secure their attention, but they are a key influence on our social future, have an increasing disposable income and an appetite for experiences that are new, value for money, braggable and unique, and that Scotland is well-placed to provide.

Mini-break missions

Our 2018 research identified eight mini-break 'missions' that young travellers seek:



Relaxing Retreat



Romantic Getaway



Arts & Culture



Sightseeing



Quality Time



Outdoors & Adventure



Activities & Events



Partying

By taking into account what our research has revealed about this younger generation, and plotting that against our eight missions, we can begin to build a compelling case for Scotland as an ideal destination, uniquely placed to fulfill the needs and aspirations of this experience-hungry younger market. We have identified four distinctive offers:

1. Create your own story
2. Create your own adventure
3. Make your own discoveries
4. Spend quality time together

1. Create your own story



PARTYING | ACTIVITIES & EVENTS

WHO	Appeals particularly to Look at Me and Fun I Deserve (refer back to page 8), with an emphasis on more extroverted travellers and non-Scots in particular.
WHY	An opportunity for maximum fun (and minimum sleep!) and the greatest impact at the time with enhanced bragging rights after the event. While it may include collisions with ARTS & CULTURE, it's really about 'all in' enjoyment.
WHERE	Glasgow and Edinburgh are known for their party scene, but there's the potential to dial up other cities/destinations too with an emphasis on emerging culture being a draw for the 'culture of first'. Music gigs, festivals and events, underground fashion culture, specialist bars and pops up can be promoted the length and breadth of Scotland.
HOW	<ol style="list-style-type: none"> 1. Create a desire to visit new cities 2. Hook potential visitors in through reality TV celebrities, music and venue links, and fashion 3. Provides easy access to 'must do' lists 4. Facilitate group/party searches and offer 'skip the queue' deals or secret passwords to create a sense of being 'in the know'



"It's my break, my time off from home-life to live it up large with my school mates."
25-35 year old, with children



2. Create your own adventure



OUTDOORS & ADVENTURE

WHO	<p>Appeals particularly to Fun I Deserve and Look at Me but is applicable to all our groups, those with and without children, and includes both Scots and non Scots.</p> <p>Offers intense experiences and challenges with nature. Often, for the youngest in this demographic, this is an opportunity to impress others while, for those at the older end, it's a reassurance that their physical ability is still with them! For all, it provides the sociable element of sharing high-adrenalin experiences.</p> <p>Scottish terrain offers many ready-made adrenalin and physical tests – Munro bagging has huge appeal for Scots, and potentially for non-Scots too.</p>
HOW	<ol style="list-style-type: none"> 1. Lay down the gauntlet – create a challenge (eg. Munro bagging) and keep it fresh and resonant 2. Build in strong elements of social relaxation – it's not just the activity but also the social enjoyment that makes a memorable adventure 3. Make it accessible – 'Only 45 minutes from Glasgow' – and keep it simple 4. Make it seasonal, part of a journey and an experience that's returned to, to create loyalty and talkability



“My mates and I committed to climbing all the peaks in Scotland – we climb in the daytime and knock back a few beers in the evening. Haven't done that many yet, but we want to do them all.”

Early 20s, without children



3. Make your own discoveries



ARTS & CULTURE | SIGHTSEEING

WHO	Appeals particularly to Learning to Explore and Invest in Me/Us .
WHY	Offers opportunities to bond and also to combine a number of activities that enable exploration, discovery and connection with local arts, culture and history. Creates authentic opportunities to meet local designers, artists, storytellers, musicians and chefs, and to visit local as well as national museums and galleries.
WHERE	Scotland is full of iconic landmarks, which are collectable along the way, and offer easily navigated history and culture trails, which delight both children and their young parents.
HOW	<ol style="list-style-type: none"> 1. Tap into specialist influencers – those with a strong passion in a specialist field 2. Create authentic experiences that bring multiple experiences together (for example, food, venue, art) 3. Promote unique, quirky and affordable accommodation 4. Facilitate discussion and conversation around points of interest rather than just advocacy or advertising 5. Promote the building and sharing of itineraries to allow travellers to filter in and filter out opportunities



“When I travel, even if it’s just for the weekend, I want to learn something local – whether it’s how to prepare a local dish, or some weird part of history, or even to say a few words in the local language.”

25-35 year old, without children



4. Spend quality time together



RELAXING RETREAT | ROMANTIC GETAWAY | QUALITY TIME

WHO	Appeals particularly to Fun I Deserve and Invest in Me/Us with perhaps most appeal to females, couples and families at the older end of this generation.
WHY	Potentially of more interest to city dwellers – both Scots and non-Scots – it offers an opportunity to escape on a spa weekend with girlfriends or partners, perhaps interspersed with wining and dining and ‘country house style’ fun. For those with children, it offers the opportunity for a quiet self-contained getaway and may included OUTDOORS & ADVENTURE offers too.
WHERE	Spas and resorts across Scotland; locations offering natural scenery, castles, local stories.
HOW	<ol style="list-style-type: none"> 1. Lead navigation with adult propositions – recharge, bond, romance 2. Reinforce navigation with child-friendly support (Jet2.com kids fly free) 3. Create connections through Facebook, blogs and word of mouth 4. Promote interesting or unique accommodation, authentic food and drink 5. Target longer breaks for non-Scots



“I love getting away with the whole family. Usually we go somewhere that we can spend time together. On these trips, my family are the attraction... After these trips, I always feel we are closer as a family.”

25-35 year old, with children



Summary: opening windows of opportunity

VisitScotland uses the insight from research to inform our marketing and the following tips may be useful for businesses and destination marketing organisations too.

Continuous digital and social engagement – cut through ‘passion’ points and relevant ‘in the moment’ activities such as online gaming, Spotify, on demand services and job listings

Adopt the Spotify model – encourage navigation through a ‘filter in’ approach aligned to brands, experiences, memberships and followings that speak to mood and need

Create a ‘deliberate obsolescence’ – the Edinburgh Fringe will always attract, but what is new and emerging in other cities and locations?

Make agile offers – focus on non-traditional accommodation and experiences first

Provide juxtaposed experiences – attract the attention of younger audiences looking to maximise their time on holiday and those with kids looking for activities and opportunities to stay active

Offer contemporary relevance – ensure marketing feels edgy and energetic, including the promotion of history and culture

Develop a micro-focus – don’t overwhelm tourists with opportunities or a wide geographical reach, make short breaks palatable and easy at first, with the opportunity to return and build

Don’t just count the easy measures – success is not just about click throughs and likes, genuine advocacy comes in many forms and much of social media filtering in is unconscious

Be the facilitator of local pride – but make sure this is linked to the UK in a non-competitive way, for example through music, fashion, entertainment

Set new standards – counteract an over-reliance on traditional forms of searching by creating in-the-moment travel apps and planning tools.

Appendix 1

Summary insight from our 2017 Millennial Travellers Topic Paper

Experience over ownership

Younger people often prefer to spend money on experiences, such as travel, rather than possessions. They may choose off-the-beaten track destinations, adventure activities and quirky accommodation, and they seek authentic local food and drink. The concept of a 'sharing economy' is popular too, connecting, as it does, with local communities, local experiences and value for money.

Selective splurging

Given their life and career stage, younger travellers are still relatively price sensitive and look to achieve more for less. However they are also selective – staying at an expensive boutique hotel for one trip but budget accommodation for another. This is true for both business and leisure trips and the key for tourism providers is to work out what experiences are important and where younger people are willing to spend money.

Two (or more) is company

This generation is very sociable and more likely to travel with friends or family. Travelling and taking part in activities helps to deepen relationships and makes them feel more connected to people, communities and the world. Social media also fuels FOMO (fear of missing out) and drives a desire to take part, engage and then broadcast.

Constantly connected

This generation will follow recommendations from friends and family – often via social media – but are less likely to respond to straightforward marketing messages. They show the highest propensity to using social media as a source of information while travelling and expect user-friendly website experiences and, away from home, excellent Wi-Fi connections.

Room for change

Younger travellers do not spend a lot of time in hotel rooms – instead they use lobby spaces to work and socialise. This means many hotels are making changes to food delivery, lobby design, common social spaces and efficient use of space in rooms. For a generation in search of both novelty and authenticity, well-designed boutique hotels, quirky concept accommodation (from yurts to log cabins) and Air BnB, which allows travellers to 'live like a local', remain popular.



Appendix

Sources and their interpretation

The following sources were used in the development of this Topic Paper:

Millennial Travellers, VisitScotland 2017

Young People Research, Kubi Kalloo 2018

Great Britain Tourism Survey

International Passenger Survey

Disclaimer

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