
L'Oeil de Paco - CAD22

Generation Y (aged 23-42) - Customers and their expectations

#1 GENERATIONS, LEISURE AND TOURISM

The tourism and leisure markets need to constantly adapt to customers' consumer patterns. They must simultaneously satisfy **several generations of consumers**, each of which have their own expectations and a different view of leisure and tourism.

BEHAVIOUR, NOT AGE

A generation is defined by **behavioural similarities** among the individuals comprising it. Ways of being and of doing resulting from multiple factors such as access to technology, changing values and shared life experiences have a significant impact on members of the same generation.

CHILDREN, TEENAGERS, YOUNG ADULTS AND FAMILIES

After the baby boomers – the most analysed generation in terms of tourism patterns – and generation X (aged 43-59) – currently the majority of customers. **What are the behaviour patterns of new and future customers?**
What are their expectations?

The purpose of this presentation is to give you some answers

UNDERSTANDING YOUR CUSTOMER

Understanding the behaviour and expectations of individuals in a generation and the values that set them apart from others means that you can also devise offerings specifically for them and accommodate them physically or virtually.

GENERATION Z
13-22 age cohort

GENERATION Y
23-42 age cohort

GENERATION ALPHA
0-12 age cohort

#2 WHO ARE GENERATION Y?

AGE?

Born between 1980 and 1999: the oldest are aged 42, the youngest 23. Also known as millennials.
Often **the parents of generations Z and Alpha**

HOW MANY?

12 million in France

32% of the global population

GENERATION Y
23-42 age cohort

KEY EVENTS

- world opening up and European construction (Erasmus, euro, etc.)
- Aids virus arrives in France (1982)
- Working week reduced to 35 hours (2000)
- Attacks of 11 September 2001
- Democratisation of the internet, video games, social media, etc.
- Subprime economic crisis
- Soaring unemployment
- Beginning of environmental activism

FEATURES TO TAKE INTO CONSIDERATION

Less materialistic: more than 8 out of 10 millennials prefer to spend money on **experiences than on acquiring stuff**

Digital natives, grew up with the internet, video games, social media, etc. Always logged on, use their smartphone at least 2 hours a day. 49% spend up to 6 hours a day in front of a screen.

Sensitive to environmental and social issues favour eco-friendly brands in line with their values.

Different perspective on work to previous generations: 55% see work as a **source of personal fulfilment** rather than an imposition. Look for work that has meaning and where they can work independently.

Crave experiences and discoveries:
86% "don't want to miss out on life" and **travel 5 times a year**, much more than older generations.

Sources: Agence Signe des Temps - Côtes d'Armor Destination

CÔTES D'ARMOR DESTINATION

CONTACT
Vincent CORRE
Tourism Development Officer
Côtes d'Armor Destination
+ 33 (0)2 96 62 72 13 - vcorre@cad22.com

UNION EUROPÉENNE
Fonds Européen de Développement Régional

Interreg France (Channel Manche) England
EXPERIENCE

#3 EXPECTATIONS OF GENERATION Y IN TERMS OF LEISURE AND CULTURE

GENERATION Y
23-42 age cohort

EXPECTATIONS

1. **Immersive and entertaining experience** where visitors can dive deep into a story and play an active part in interactive, authentic activities.
2. **Educational dimension**: teach children something, develop sensory and cognitive ability, fitness and/or knowledge, instil values, etc.
3. **Interaction is one of the main draws for** parents visiting a site: they are looking to reconnect, to create memories together and share emotions. **To attract this cohort, offer activities that can be shared by all ages**.
4. **Keen on new technologies and on sharing family outings** (81% share photos of their children on social media). And yet millennials are keen on **slow tourism, on switching off**. Focus on authenticity, on living in the moment.
5. **Venue accessibility, prices and child safety** are key factors when choosing family holidays and activities. According to Booking, offering junior and family rates can increase bookings by 15%.

FAMILY FOCUSED

- **Family packages should be different to school packages:** families visit cultural or leisure venues to learn and discover – but most of all to do stuff together. Offer **collaborative activities or games that involve both parents and children.**
- **Exploit generational differences to your advantage:** offer tours, attractions, games or exhibitions with a range of references, where siblings can interact with each other, with their parents, their grandparents, etc.
- **Immersion and interaction don't necessarily need new technology:** play tools, fun signage, tours that generate questions, puzzles to solve, challenges to meet, comparing works of art with everyday life.

#4 THEIR CENTRES OF INTEREST

GENERATION Y
23-42 age cohort

TRAVEL

1. 5 **Trips a year** on average
2. 78% **Check online travel review sites** (TripAdvisor, Google) before booking a holiday or activity
3. 92% Would trust what an **influencer says more than a destination** or brand

SOCIAL MEDIA

89% of millennials are online every day on social media

PREFERRED PLATFORMS:

- 88% **YouTube**
- 83% **Facebook**
- 67% **Instagram**

SPORT

65% of the 15-34 cohort who enjoy playing sport **have at least one sport-related account on social media**

50% **Watch live sport at least once a week** (24% for generation Z)

LOCAL, DELICIOUS FOOD

70% of the 18-34 cohort **buy local products or products with a short supply chain**

56% See **eating mainly as a pleasurable activity** (43% for French people as a whole)

VIDEO GAMES

88% **Men** aged 25-34 **play video games (86% of women)**

SERIES

71% Watch a series **at least once a week**

51% Say they watch one **every day or almost**

Sources: Diplomeo & le Blog du Modérateur, Instagram Trend Report 2022, Think With Google, DeloitteBlog du Modérateur, Instagram Trend Report 2022, Think With Google, Deloitte LSA

#5 WHERE DO THEY GET THEIR INFORMATION? WHAT ARE THEIR INFLUENCES?

GENERATION Y
23-42 age cohort

1. **The internet is the primary source of information for generation Y,** who are familiar with **Google and online review sites**. Do most of their searches and purchases from their **smartphone.**

2. **47% favour social media for news** (Facebook, Twitter, Instagram, Snapchat and, to a lesser extent, TikTok. Follow **traditional journalists and media** but also influencers and content creators

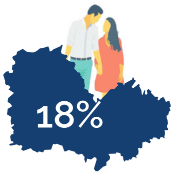
3. **Increasingly likely to take their children's opinion** (generations Z and Alpha) into account. In 2019, 43% of parents' holiday choices were influenced by children and **80% said they check with their children before making a booking.**

4. Although relied on less and less, television is still a source of information for this generation, whose choice of media is not exclusive: **49% still watch the news on television**

#6 GENERATION Z IN CÔTES D'ARMOR – SOME STATISTICS

SHARE OF POPULATION IN CÔTES D'ARMOR

Adults aged 23-42 make up **18% of the population in Côtes d'Armor**[1]
– about 97,000 people



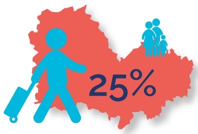
GENERATION Y IN CÔTES D'ARMOR

Generally living with a partner (72%) and in most cases with Alpha and Z generation children (on average 2 children per family).

Most live in urban areas (Saint-Brieuc, Dinan, Lamballe, Lannion, etc.) in the north.

AND IN TERMS OF REGIONAL TOURISM?

Generation Y makes up about **25% of tourists staying in Côtes d'Armor**[2]
– about 900,000 young tourists a year



Families with children	Indicators
Group size	4.1 people
Length of stay	7 nights
Spending per day per person	€40
Holiday budget	€1,142

Coming up in 2023
Data update with REFLET 2022

[1] Source: INSEE population census - 2019
[2] Source: REFLET survey 2016 - Brittany Tourist Board

GENERATION Y FOR TOURISTS

Most are from the greater Paris region (23%), followed by Brittany (12%), and stay for about 7 days. First came here in summer with their parents or friends, renting or camping.

Generation Y families with children: 1.9 million tourists a year

16% of generation Y families go cycling, visit museums and/or exhibitions during their holiday. More than 10% do water sports or visit leisure parks.

#7 IN 2023, A NEW COLLECTION OF DOCUMENTS

PROVISIONAL SCHEDULE 2023: PRESENTATION ON TOURISM AND LEISURE CUSTOMERS

March/April – Presentation on **Generation Alpha, Z and Y** based on analysis by Agence Signe des Temps

May – Experience analysis **in Côtes d'Armor based on online customer posts** by season and type of service - TRAVELSAT

June/December – **Tourism customers and day trippers by profile in Côtes d'Armor**
Results of the new REFLET 2022 study - Brittany Tourist Board

The information in this document is mainly based on an analysis by Signe des Temps on behalf of Côtes d'Armor Destination

Generation Y (aged 23-42) - Customers and their expectations

OVER TO YOU! WHAT CAN YOU DO TO ATTRACT AND RETAIN THESE CUSTOMERS?

SEE CÔTES D'ARMOR DESTINATION FOR CASE STUDIES

- Key tourism trends and figures
- Accommodation and leisure activities
- Tourist and day tripper flows - Orange Flux Vision data analytics
- Regional monitoring centres

Côtes d'Armor Destination:
www.cad22.com

studies on tourism
www.armorstat.com

Publication date 18 April 2023

CONTACT
Vincent CORRE
Tourism Development Officer
Côtes d'Armor Destination
+ 33 (0)2 96 62 72 13 - vcorre@cad22.com

CÔTES D'ARMOR DESTINATION

Côtes d'Armor le Département