

The background of the entire page is a photograph of two young women sitting on a dark, rocky cliff. They are seen from behind, looking out over a vast, blue ocean under a soft, hazy sky, likely at sunset or sunrise. The woman on the left has long dark hair and is wearing a bright blue tank top. The woman on the right has long, straight brown hair and is wearing a light-colored top. The overall mood is serene and adventurous.

KiLROY

YOUTH TRAVEL INSIGHT REPORT

2023

Preferences among young travellers
and their perceptions of travel agents

CONTENTS

P.

- 04** ***WELCOME FROM THE AUTHORS***
- 06** ***WHERE YOUNG TRAVELLERS GO FOR INSPIRATION***
- 10** ***YOUNG TRAVELLERS' BUCKET LIST AND BUDGET***
- 16** ***WHAT YOUNG PEOPLE THINK OF TRAVEL AGENTS***
- 22** ***KEY TAKEAWAYS FOR THE TRAVEL INDUSTRY***
- 24** ***RESEARCH METHODOLOGY***
- 24** ***COPYRIGHT AND USAGE***
- 25** ***ABOUT KILROY***

WELCOME FROM THE AUTHORS

We believe in the transformational power of travel – the power to shift mindsets, break down barriers and change people for the better.

Experience has taught us that the person who ends a journey is different from the one who started it. And that travelling is much more than just leaving home - it's meeting the world. It's exposing yourself to new people, new places and new perspectives.

Travel is perhaps at its most transformative when we're younger. When we're defining who we are and how we want to live our lives. When we're deciding where we want our education and career to take us. And when we're at our most receptive to change.

This may go some way to explaining why young travellers have been the most resilient after Covid shut down borders for the best part of three years in many places. And why research from October 2022 found that 60% of 16-to-34-year-olds in the UK had been abroad on holiday last year. That's compared to just 31% of adults aged over 55 years.

This trend looks set to continue this year, with the same study finding that young adults are more likely than their older counterparts to travel abroad in 2023.

It is clear young people in the UK have a large appetite for travel. But after three years of disrupted plans, how do they wish to travel? Where do they want to go? And what role does a travel agent now play?

Those are the questions we wanted to answer. And this study aims to help travel agents better understand the needs of young travellers in the UK, where they can offer the most value, and how they can capture the attention of this powerful new group of travellers.

We hope you enjoy the read.



**HOLLIE
YOULDEN**

Head of UK Marketing
KILROY

WHERE YOUNG TRAVELLERS GO FOR INSPIRATION

ONLINE IS WHERE IT'S AT



It will come as no surprise that, in today's digital world, the internet is the first place young travellers turn to for travel inspiration. Whether it's for ideas on the best destinations to visit or the top recommended activities, the world wide web is the most popular channel for finding these tips. Our national study found that **58% of 18-35-year-olds use a general internet search when looking for travel inspiration.**

Instagram tops the list for most popular social media channel with over a third of young people turning to the platform when looking for travel inspiration. This perhaps comes as no surprise given that this highly visual channel has helped the number of travel influencers explode in recent years.

YouTube – another popular channel for travel influencers with longer videos covering destinations and activities in more depth – comes in second with **25% of 18-to-35-year-olds choosing the video channel as their source of inspiration.**

At just 4% of votes, Twitter is one of the least popular social media channels young people visit for travel inspiration. But this is unsurprising given that it's a channel best suited to words, and not videos or photographs of exotic places. However, what is surprising is the lack of relative interest in Facebook as a source of inspiration. Facebook is a channel that suits content delivered in all formats – text, video and photographs. And it's a channel where

you can find groups dedicated to topics including backpacking. Yet **less than 7% of those surveyed would visit Facebook when actively seeking travel inspiration.** Since as far back as 2018, Facebook has been considered a place for 'old people', and this survey adds further fuel to that fire.

This is not to say that travel agents should pull back from investing in social media. Far from it.

Instead, this data goes to show how important it is to inspire customers across a range of channels and formats. It also goes to prove something that we've all known for a long time – your brand needs to be on page one of Google, so a strong SEO and web content plan is essential to meeting customers where they are.

TOP 10 SOURCES OF TRAVEL INSPIRATION FOR YOUNG PEOPLE

Channel	%
General internet search	58%
Recommendations from friends, family, colleagues	49%
Instagram	32%
Online travel forums	29%
TV documentaries and travel shows	28%
YouTube	25%
Printed travel guides (Lonely Planet, Rough Guides etc)	25%
TikTok	14%
Travel agent	13%
Tourism boards	12%

INSPIRING A NEW GENERATION OF TRAVELLERS OFFLINE

Coined by Robert Cialdini in his 1984 book *Influence*, social proof is a phenomenon where people copy the behaviour of others when in a new or unfamiliar social environment. And it goes some way to explaining why recommendations from friends, family and colleagues are so powerful. So powerful, in fact, that **49% of 18-to-35-year-olds surveyed would turn to the people they know when deciding where to go on holiday.**

This makes recommendations the second-most popular channel for travel inspiration among younger travellers.

And while the common assumption is that late Gen Z and early millennial travellers would turn predominantly to digital channels, the national survey revealed that **25% would turn to guidebooks, like Lonely Planet and Rough Guides, for travel inspiration.** To put that in perspective, it's the same percentage as those who would use YouTube as a source of inspiration.

This serves as a useful reminder for travel brands not to ignore the medium of print. Print may now be considered a 'traditional' advertising channel, but when a quarter of young people seek out travel recommendations on the pages of a book, it remains an important way to reach your audience.

Perhaps due to the pandemic and a two-year absence of in-person events, travel expos are not so popular among 18-35-year-olds when it comes to travel inspiration. Only **4% of survey respondents would consider attending a travel expo when seeking ideas on where to go and what to do.**

Most interesting to travel agents is the finding that **13% of young people would go to a travel agent for travel inspiration.** 13% may not sound like much, but that's 28% more than would go to Reddit for travel inspiration, and 20% more than would turn to travel magazines.

This presents an opportunity for travel agents to make themselves relevant in the inspiration phase. An SEO and multi-channel content marketing plan that positions travel agents as offering inspiration is a way to gain visibility amongst this demographic. As is offering face-to-face meetings [online or in-person] to connect experienced travel advisors with young travellers deciding where to go.





***YOUNG
TRAVELLERS'
BUCKET LIST
AND BUDGET***



THERE'S BIG LOVE FOR EUROPE AMONG YOUNG TRAVELLERS

When imagining young travellers, it's easy to picture the quintessential backpacker roaming Southeast Asia. Or travelling by campervan along the east coast of Australia.

Yet data from this national survey reveals that destination preferences for 2023 lie much closer to home, with **Europe as the preferred region of travel and 41% of 18-35-year-olds planning a trip to the continent this year.** That's compared to 27% of young travellers considering North America and 20% considering Southeast Asia [in second and third place respectively].

However, Europe might be a more difficult destination for travel agents to sell, given that **69% of those considering Europe for their next trip would organise their holiday themselves.**

Where travel agents – outside of the bucket-and-spade market – can make themselves more relevant is by offering attractive itineraries that customers can tailor to create their dream

holiday. That's because **29% of respondents would consider booking their Europe holiday with a travel agent if it was a tailor-made trip with multiple elements.**

The national survey also suggests an appetite for a slower pace of holiday style in Europe that travel agents can facilitate. Of those preferring Europe as their travel destination this year, **21% would consider booking rail passes with a travel agent.** That's the second-most popular service or product offered by travel agents after tailor-made arrangements.

Given that Europe is much closer to home than other parts of the world, holiday duration preferences remain modest. The majority of those considering Europe this year are planning to spend less than two weeks on holiday.

Whereas looking further afield, a holiday of two to three weeks is the preference for North America and Southeast Asia.

This is unsurprising given the longer flight times and greater financial cost of flying to these regions. And the preference for holidays of less than three weeks is to be expected with the bulk of the market looking for trips that can fit between study, work and life commitments.

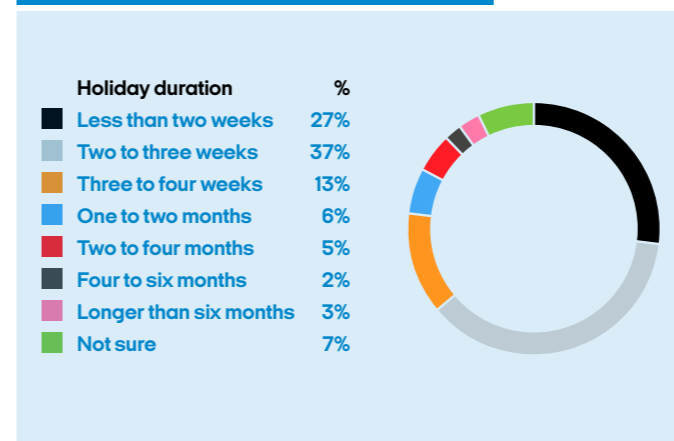
But there is a segment of 18-to-35-year-olds considering much bigger trips this year with **15% considering a trip of one to six+ months.** With that desire for an extended break of travel comes a change in destination preferences.

Here we see the classic backpacker destinations grow in popularity with 38% considering Australia and New Zealand,

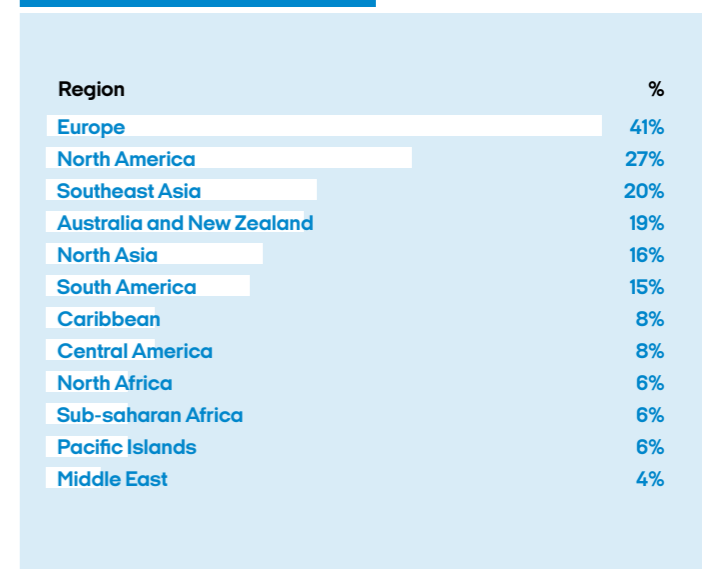
34% considering South America, and a close tie at 30% for both North America and Southeast Asia. This smaller, niche market is more difficult for travel agents to reach, but possibly where travel agents are more relevant and valuable.

Despite the impact of Brexit on visa requirements for British nationals travelling to the EU, the idea of a longer trip around the continent is still attractive. In fact, Europe is the second-most popular region for young people considering a trip of more than four weeks.

HOW LONG YOUNG PEOPLE ARE LIKELY TO TRAVEL FOR



REGIONS OF THE WORLD YOUNG PEOPLE ARE PLANNING ON VISITING THIS YEAR



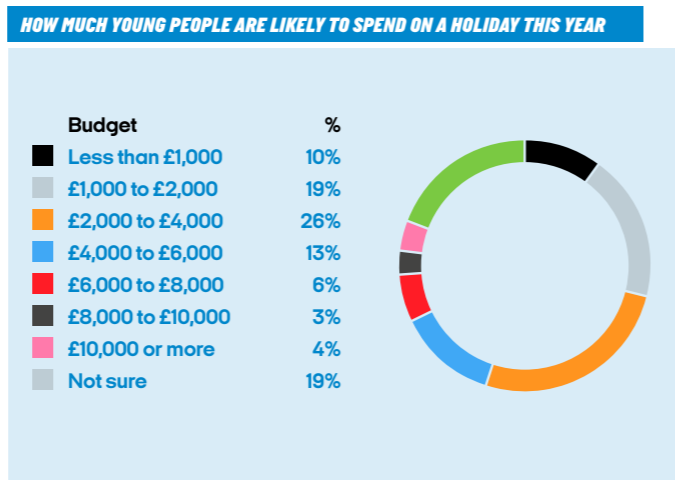
YOUNG PEOPLE ARE PREPARED TO SPEND LARGE ON TRAVEL THIS YEAR

As far as the economy goes, it's been a bleak picture for Brits in recent years. As it has for other parts of the world. But it's not enough to completely dampen the desire for travel and the financial commitment required. Despite the recession and cost of living crisis in the UK, budgets for a big trip abroad remain healthy with **over a quarter of respondents considering spending between £2,000 - £4,000 on their trip.**

The amount of money young people are willing to spend on their trip is, unsurprisingly, influenced by their choice of destination. Long-haul destinations demand a greater budget, and young people are fully aware of the higher price tag with 19% expecting to spend £4,000 - £6,000 on a trip to Australia or New Zealand. It's a similar figure for North and Latin America.

These findings support research from other sources that suggest late Gen Z and early millennials are driving the travel recovery. They're prepared to spend more than older travellers and seemingly dedicate a large portion of their income to travel and new experiences.

Within the 18-to-35-year-old segment you'll find a mix of students and workers. This national survey has revealed that 52% of students are not supplementing their income with a job. Yet despite this lack of income, **27% of students are budgeting between £2,000 - £4,000 for their trip abroad.**

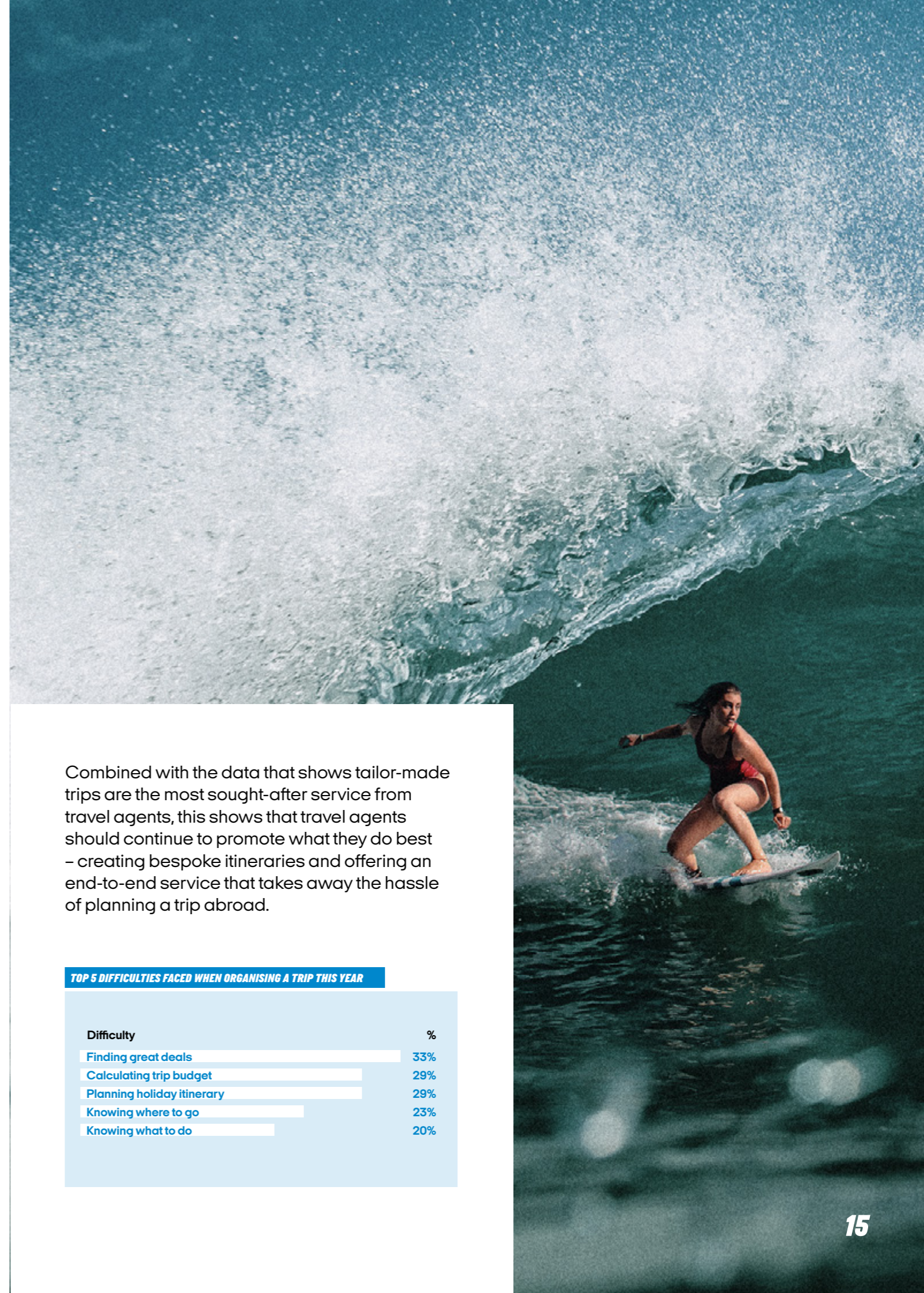
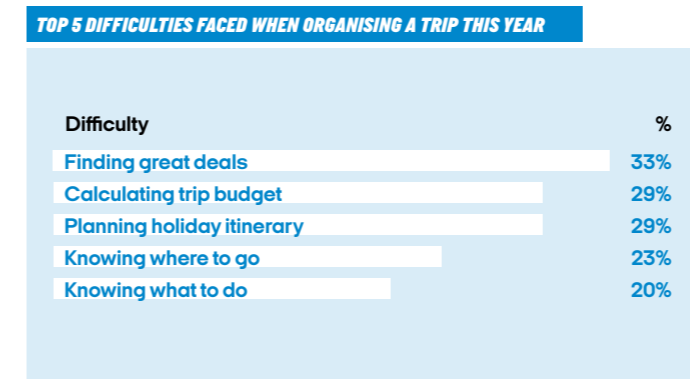


And the majority will do so with their own savings. This begs the question of how students in the UK will save the money to afford a big trip if less than half are in employment. It's likely that students will work after finishing their education to top up their savings before heading abroad.

Regardless of budget and whether it's less than £4,000 or closer to £8,000, **finding the best deals is the top concern among young people when it comes to organising their trip.** Over a third cite this as the main difficulty they'll face, followed closely by 29% thinking it will be difficult to calculate how much the trip will cost.

After perceived difficulties concerning budget and deals, itinerary planning is the third greatest difficulty young people face in organising their trip.

Combined with the data that shows tailor-made trips are the most sought-after service from travel agents, this shows that travel agents should continue to promote what they do best - creating bespoke itineraries and offering an end-to-end service that takes away the hassle of planning a trip abroad.





***WHAT YOUNG
PEOPLE THINK
OF TRAVEL
AGENTS***

ROADBLOCKS TO USING A TRAVEL AGENT

Young travellers love to explore the world, experience different cultures and meet new people. Yet even though travel agents help bring the world to travellers and make it easier for people to travel, only **11% of young people would plan on consulting a travel agent to help organise their holiday**. So, what's putting young people off using travel agents?

For travel agents, price sensitivity among consumers is one of the greatest challenges. There's a real concern among young travellers that they will pay more if they book with a travel agent, with **56% of respondents concerned that travel agents are expensive**.

But cost isn't the only barrier.

Although the big tourist attractions like Machu Picchu and Angkor Wat draw travellers of all ages, younger travellers seek more from their trips than just sightseeing - they're looking to connect with the local culture and get off the beaten path.

Despite travel agents offering a wealth of travel experiences to suit all tastes and styles, **young travellers are concerned that travel agents will only recommend touristy activities and destinations with 33% of respondents citing this as a concern**.

There is a perception that travel agents may not be able to help them get close to a destination beyond the commonly visited places.

Young travellers also want to know that holiday recommendations will align with their tastes and what they want from a trip. Customisation and having a tailored holiday package are important to this generation of travellers.

Although many travel agents pride themselves on their ability to create a dream package for individual travellers, **29% of 18-to-35-year-olds think that travel agents might try to sell them activities that aren't what they want**.

TOP 5 CONCERNS YOUNG PEOPLE HAVE WITH USING A TRAVEL AGENT

Concern	%
Travel agents are expensive	56%
Agents will only recommend touristy places	33%
Agents will push irrelevant activities	29%
Limited trip customisation options	22%
Lack of trust	15%

While 22% were worried that by organising their trip through a travel agent, they wouldn't be able to customise their trip to their needs.

Forewarned is forearmed. Knowing how travel agents are perceived by younger travellers means brands can address these concerns and prove their value with bespoke travel packages that put customers at the centre of the conversation.



WHAT TRAVEL AGENTS NEED TO OFFER YOUNG TRAVELLERS

Young people today have the world at their fingertips – literally and figuratively. With a quick Google search they can find all the information they need to plan a trip to a far-flung destination. With the proliferation of online booking platforms and apps, young travellers can easily book multi-leg flights and a combination of hotels or hostels to make their holiday dreams a reality.

But despite the accessibility of travel in today's digital age, there's still a place for travel agents to serve young travellers. And it starts with proving your value.

Where agents can really help young travellers is by making what's difficult, easier. Specifically, turning multi-day, multi-destination itineraries into a painless planning process. **22% of 18-to-35-year-olds would consider using a travel agent when their travel plans are complex and not something they could organise easily on their own.** And tailor-made trips are the number one service young people will seek out from a travel agent.

In tandem with this service, travel agents should lean into their ability to work with a given budget and provide customers with a bespoke package that gets them the most bang for their buck. That's because **36% of young people would consider organising their trip**

with a travel agent if they offered good value for money. Which means the biggest potential for travel agents in attracting young people is by demonstrating that they can help travellers get the best experience for their budget, especially when the trip is longer and more complex.

TOP 5 REASONS YOUNG PEOPLE WOULD CONSIDER BOOKING WITH A TRAVEL AGENT

Reason for booking	%
If they offered good value for money	36%
If my travel plans were complex	22%
If they offered unique itineraries and experiences	18%
If they offered exclusive travel deals	18%
If they offered stress-free trip planning	16%

Travel agents can also use their supplier relationships to help young people get the best deals. Whether that's student airfares or exclusive discounts on land product, or value-adds with free upgrades and package promotions. With **32% of respondents believing that finding the best deal will be the most difficult part of organising a trip abroad,** there's certainly a role to play for travel agents in deal-hunting on behalf of their customers.

Just **2% of younger travellers would look for a sales office close to where they live when considering booking with a travel agent.**

This is likely a result of the pandemic and the 'new normal' of online meetings, combined with email often being the preferred channel of communication between customers and businesses.

However, retail travel agents will always be at an advantage thanks to the footfall of the high street, as long as they can secure an equal 'real estate' online in the search rankings.

TOP 5 TRAVEL SERVICES OR PRODUCTS YOUNG PEOPLE WOULD CONSIDER BOOKING WITH A TRAVEL AGENT

Travel service or product	%
Custom trips with multiple elements	33%
Safari adventures	22%
Train passes	20%
Island-hopping sailing adventures	19%
Round-the-world flights	19%





KEY TAKEAWAYS FOR THE TRAVEL INDUSTRY

INVEST IN SEO AND CONTENT MARKETING TO MEET YOUNG TRAVELLERS WHERE THEY ARE

Google and similar search engines are the top place young travellers go for travel inspiration. To ensure travel agents keep filling the top of their sales funnel, it's important to have your content ranking where people will see it. This means investing in inspirational content that answers the key questions young people have of where to go and what to do.

BE SELECTIVE WITH YOUR CHOICE OF SOCIAL MEDIA CHANNELS

It can be tempting to get your brand on as many channels as possible. But with younger people preferring the more visual channels of Instagram, YouTube and TikTok, travel brands can give themselves a free pass and focus on the channels that are going to drive the best results. So don't give into FOMO if you're not killing it on Twitter or Pinterest.

SHOW WHAT EUROPE CAN OFFER BEYOND BUCKET-AND-SPADE

Whether or not it's spurred by the desire to travel closer to home after disruptions during the pandemic, Europe is by far the most popular travel destination for young people this year. But with holidays to Europe so easy to arrange independently, travel agents in more niche markets can make themselves relevant by showing the wealth of experiences the continent has to offer.

SHOWCASE WHAT YOU OFFER OUTSIDE THE TOURIST HOTSPOTS

The likes of the Great Pyramids and the Taj Mahal are always going to attract travellers of all ages. But young people want more than just sightseeing. They're looking for cultural immersion and don't only want to see the "touristy" places. For that, travel agents can bring to life the less-visited places that offer the kind of experiences young travellers want.

BE PREPARED TO PROVE YOUR VALUE

While the pandemic hasn't dampened young people's desire to travel, the cost of living crisis does mean that these travellers are price sensitive and looking for the best deal. Holiday budgets are healthy, with most planning to spend between £2-4k. But for travel agents to win their business, they need to provide young people with a trip that's within budget and that offers great value for money.

COPYRIGHT AND USAGE

This document is copyright 2023 KILROY.
All rights reserved.

The information in this document can be referenced in the media, in whole or in part, as long as this document is cited as the source for the information. In no way does this document provide an endorsement of any product, service, company, or individual.

This document is provided "as is." Information and views expressed in this document may change without notice. The strategies and examples depicted herein are provided for illustration purposes only and are not guarantees of specific results. You bear the risk of using this document.

If you would like to schedule a media interview about the study and its findings, please contact Hollie Youlden at hyou@kilroy.co.uk

RESEARCH METHODOLOGY

KILROY led this research study.

The survey was administered to 800 adults in England aged 18-35 who consider themselves to be passionate about travel. The survey was conducted online from 15th to 16th February 2023 and has a margin of error of 4%.

ABOUT KILROY

KILROY is an international travel agency specialising in products and services tailor-made for youths and students. We are passionate about helping 18-to-30-somethings explore life through adventure and education, making travel dreams come true.

Whether it's a working holiday in Australia or a backpacking adventure through Southeast Asia, a month of Spanish school in Latin America or an overland camping safari across Africa, we help young, curious minds embark on life-defining adventures all over the world.

Established in Denmark in 1991, we are today the largest youth and student travel agency across seven markets in the Nordic region, with the UK becoming our eighth market in the spring of 2023.

Learn more at kilroy.co.uk

KⁱLROY

