ETC MARKET STUDY

STUDY ON GENERATION Z TRAVELLERS

EUROPEAN
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Study on Generation Z Travellers

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Cover photo: Young adult friends on a hike celebrate reaching a summit near the coast together.
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FOREWORD

Youth travel has grown quickly over the past few decades due to improved global mobility, technological advances and stronger economic, cultural and political exchanges. In 2017, the youth travel market was estimated to account for 23% of all international tourist arrivals, generating more than €250 billion.[1] It is only expected for this segment to become increasingly important and even more dynamic as a new generation of travellers - Generation Z, enters the group of youth travellers.

Members of Generation Z are often described as highly adaptable, smart and tolerant. They are hyper-connected and grew-up with challenges relating to environmental sustainability, terrorism, etc. Their different lifestyles, motivations and habits make them a segment difficult to generalise, but also a segment that will pave the way for innovation and responsible tourism. Generation Z travellers are still discovering and solidifying their consumption preferences, and this presents a tremendous opportunity for the travel industry to get to know them and gain a better vision of how tourism demand could evolve in the near future.

To grasp this opportunity, the European Travel Commission (ETC) launched the present study, which investigates the travel preferences and behaviour of Generation Z travellers from four markets - China, Germany, UK and US. The study delves into their motivations, aspirations and views, and translates those into future-oriented travel market intelligence. In addition, the report offers a list of 12 trends, which illustrate what Europe's tourism sector could expect to see in terms of both supply and demand, in the coming 10-15 years as Gen Zers grow and become the primary decision-makers in travel.

ETC trusts that this report will provide practical guidance and the necessary intelligence to ETC member countries to design targeted and impactful marketing and promotion strategies to attract Generation Z consumers.

Dr. Peter de Wilde

President

European Travel Commission

[1] WYSE Travel Confederation (2018) New Horizons IV report.

EXECUTIVE SUMMARY

UNDERSTANDING GENERATION Z

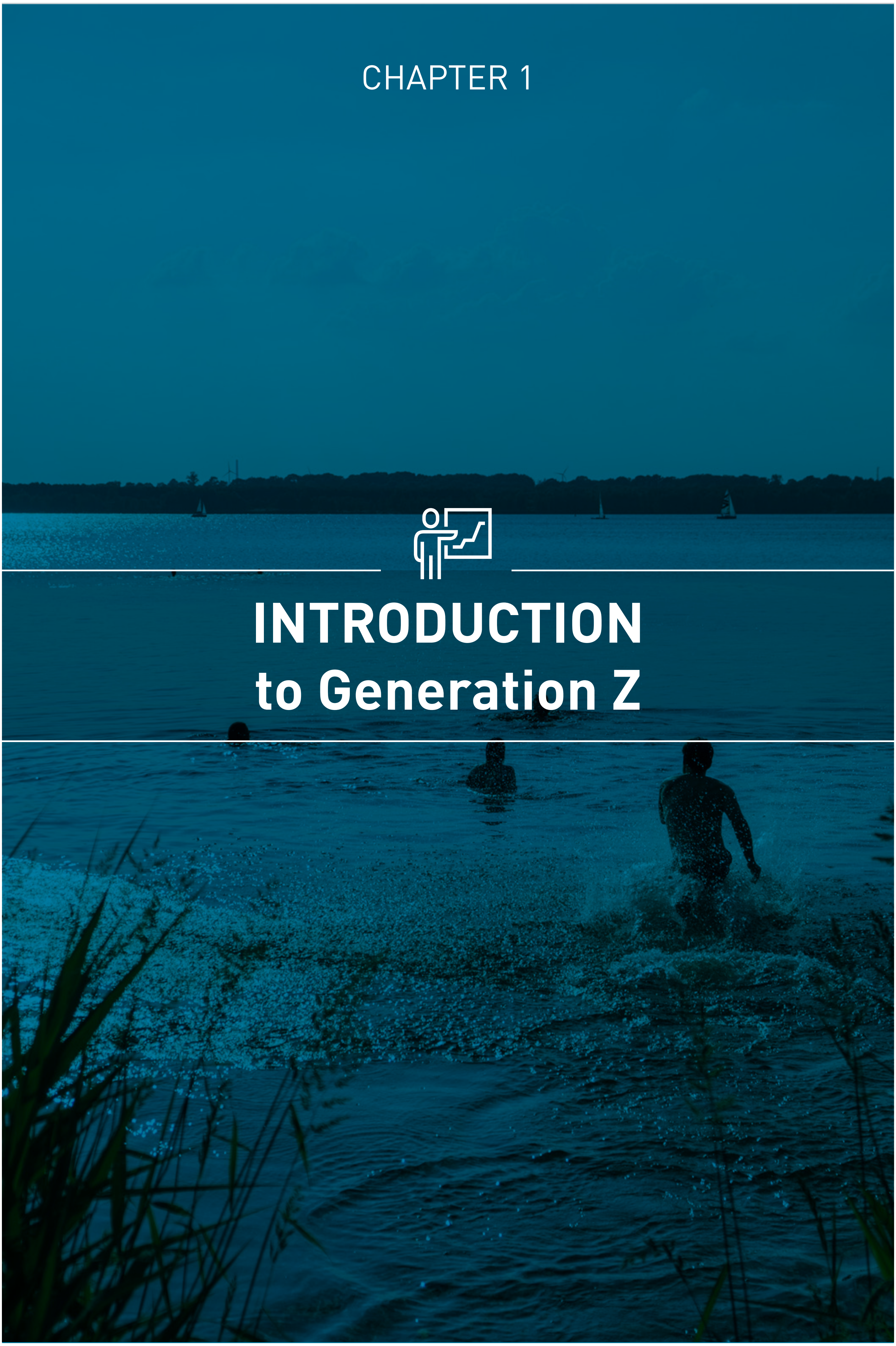
- Generation Z is defined for the purposes of this study as those born between 1996 and 2012. At the time of publication (2020), this refers to individuals ranging from 8 to 24 years of age.
- A hyper-connected generation, Gen Z grew up in an era of unprecedented awareness about human behaviour, personal health, technology and humankind's impact on the environment. Major issues that have grown in importance since the start of the 21st century, such as globalisation, the 2008 financial crisis, terrorism, climate change, and technology have played a strong role in shaping Gen Zers' attitudes and beliefs, and by extension, their travel behaviour.
- Inspired by Gen Zers such as Greta Thunberg, Gen Zers are growing up with acute awareness of and their sense of responsibility towards global community and environment. In countries such as Germany and the UK, their attitudes around aviation tax and the future of mobility appear to differ sharply from their older counterparts.
- The current demographic structure of the world's population is likely to cause major changes in consumer travel demand as the world's youngest populations grow, become more affluent and begin to travel. For this reason, as Gen Z reaches adulthood, major growth can be expected from Africa, Latin America, and South-East Asia.
- Gen Z can be considered as the first generation to be digital natives, ensuring their embrace of technology from an early age. For this generation, the use of devices is widespread, raising expectations around affordable, seamless connectivity at home, and while travelling.
- As discussed in the secondary research for this report, the intense use of technology, as well as nervousness around issues such as climate change, the global economy and more recently, Covid-19 is making Generation Z more nervous and increasingly aware of the importance of physical and mental health, than their predecessors.

GENERATION Z TRAVEL TRENDS

- Quantitative research carried out for this study among Gen Zers aged 18-24 from four major outbound markets (China, Germany, United Kingdom and the United States) found that cost and safety dominate the decision-making process when choosing a European destination. Safety and security are also rated highly by every market, especially for Chinese Gen Zers for whom it is the top reason for choosing a destination.
- Gen Zers showed the strongest preference for visiting Western European, Mediterranean countries: France, Italy and Spain. Chinese Gen Zers diverge from this pattern in that they show a strong preference for Germany and Nordic destinations, such as Denmark and Finland.
- The two ETC Passion Communities that Gen Zers are most aligned with are Immersive Explorers' (due to their fascination with local gastronomy, urban culture and traditions), as well as City Life Enthusiasts due to their interest in shopping and nightlife while travelling.
- The primary research for this report confirmed that climate change and mental health are the aspects which are of biggest concerns to Gen Zers in Germany, the UK and US Progressive beliefs around personal identity such as racial, gender and LGBTQ equality are also of major importance to Gen Zers from these markets.

RECOMMENDATIONS

- Europe's NTOs and DMOs face the need to engage with a new generation of travellers who are digitally native, globally connected and serious about changing the world around them. This underlines the importance of working with young people when developing products and marketing campaigns, in order to understand their perspective on these issues, first-hand.
- As the first fully digitally-native generation, Gen Zers are highly skilled at using tech to satisfy their needs at all stages of their journey, requiring European destinations to adapt their approach to marketing and product development, particularly through using highly engaging content across multiple platforms.
- European destinations should harness Gen Zers' aspirations to improve the world around them, and use them to move away from the pattern of 'growth for the sake of it' towards a more sustainable model that helps Gen Zers to give back to the destinations they visit.



CHAPTER 1

INTRODUCTION to Generation Z

1. INTRODUCTION

1.1 DEFINING GENERATION Z

Definitions of Generation Z (referred to collectively in this report as Gen Z, or individuals as 'Gen Zers') vary, however it is largely agreed that the oldest members of Gen Z were born in the mid-1990s and the youngest in the early 2010s. In general, it is agreed that the first cohort of Gen Zers (the oldest group) were born from the mid-90s onwards (sources such as Ipsos or Morning Consult argue for 1996[1] or 1997[2], respectively), and the youngest in this group were born 2010-2012.

It is important to note from the start that this wide range spectrum makes it hard to make specific catch-all observations about Gen Z, especially as data and observations on young people are difficult to collect for reasons relating to consent and data protection. To address this, one observatory -Trend Hunter- has split Gen Z into two age brackets: Gen Z Tribe (the older segment) and Gen Z Alpha.[3] Another, Wonkhe, divided Gen Zers into 'Big Zers' (1995-2002) and 'Little Zers' (2003-2010).[4]

Based on the definitions available, we propose the widest definition of Gen Z, those born 1996-2012. At the time of publication (2020), this refers to individuals ranging from 8 to 24 years of age. Given that young people's tastes, life experiences and consumer spending power evolve rapidly between these years, and in light of the aim of this study to understand Gen Z's travel behaviour, we shall divide this group into three sub-groups:

- **Ages 8-11 (older primary school children)**
- **Ages 12-17 (teenagers, secondary school age)**
- **Ages 18-24 (students and young professionals)**

Wherever possible, the secondary resources gathered for this study refer to Gen Z as a whole, however, specific age groups may differ according to the study that is referenced. Where it is known, the age group surveyed has been stated. The primary consumer research for this study (online survey) focuses on the 18-24-year cohort only, on the basis that this group was the most active consumer group of the three, and most likely to be able to make independent travel decisions.

1.2 WHY YOUNGER TRAVELLERS MATTER

The importance of youth travel for destinations today and tomorrow.

Assumed to be low spenders, the youngest cohorts of global travellers are often overlooked by destination authorities and tourism suppliers. However, they play a key role in shaping consumer demand, and in acting as an agent of change in destinations. As research carried out for the World Tourism Organization (UNWTO) has shown, young people have increasingly perceived travel as an essential element of their life and not just a brief escape from reality; a trend which first became pronounced among Millennial-aged travellers. On a broad scale, youth travel creates multiple benefits both for destinations and individual travellers:[5]

- Young travellers are likely to return and give more value to the destination over time
- Young travellers are the pioneers who discover new destinations
- Young travellers are at the cutting edge of using new technology
- Young travellers gain cultural benefits from their travel and contribute to the places they visit

As the generation that has embraced technological innovation and is the most prepared to experiment and think outside the box, Gen Z is likely to play a key role in triggering innovation in destinations and tourism industry development.[6] The influence of Millennials in this regard can be seen through the urban gentrification sparked in university districts, the development of luxury hostels, the widespread use of the collaborative economy (not only for booking accommodation but tours, activities and transport too) as well as the 'discovery' of new destinations among tribes, such as food-lovers or party-goers.

1.3 UNDERSTANDING GENERATION Z

1.3.1 Generation Z – the generation that will shape future travel demand

In 2018, Bloomberg predicted that by the following year, Gen Z would overtake Millennials as the most populous generation on the planet.[7] Additionally, as Section 1.4 shows, some of the world's most populous countries are also some of the most youthful. As a result, the current demographic structure of the world's population is likely to cause major changes in consumer travel demand as the world's youngest populations grow, become more affluent and begin to travel. For example, as Gen Z reaches adulthood, major growth is expected in outbound travel from Africa, Latin America, and South-East Asia. Therefore, understanding Gen Z travellers and their concerns and motivations is fundamental to evaluating how demand for tourism could evolve in the years to come, and how it could impact tourism in Europe and the wider world. For this reason, this study focuses not only on Gen Z's travel behaviour and motivations, but also seeks to understand how these attitudes may eventually shape the future of the global travel sector itself.

1.3.2 Contrasting Generation Z with other generations

The widespread use of the internet, the homogenisation of global commerce and the resulting confluence of global consumers' tastes in fast-moving goods, such as music, fashion, technology have caused many to question whether age is genuinely a useful indicator of generational values and consumer preferences. At the same time, it could be argued that the influence of global connectivity between different age groups, which has the effect of different generations gradually sharing similar habits and interests, is shaping human behaviour even more strongly than socio-economic differences.[8]

The table below gives an interpretation of how behaviour and consumer values may be compared across four generations:

Figure 1: Contextual background for successive generations, 1940-2010

	Baby boomer 1940-59	Gen X 1960-79	Gen Y 1980-94	Gen Z 1995-2010
Context	• Postwar • Cold war	• Political transition • Capitalism and meritocracy dominate	• Globalization • Economic stability • Emergence of internet	• Mobility and multiple realities • Social networks • Digital natives
Behaviour	• Idealism • Revolutionary • Collectivist	• Materialistic • Competitive • Individualistc	• Globalist • Questioning • Oriented to self	• Undefined ID • "Communaholic" • "Dialoguer" • Realistic
Consumption	• Idealogy • Vinyl and movies	• Status • Brands and cars • Luxury articles	• Experience • Festivals and travel • Flagships	• Uniqueness • Unlimited • Ethical

Soure: McKinsey & Company (2018), 'True Gen': Generation Z and its implication for companies

As the table above shows, generations are shaped by the context in which they emerged.[9] While Baby Boomers grew up during the post-World War II context of rapid economic growth and Millennials emerged as globalisation gathered pace, Generation Z was born on the border of two Millennia, and as the youngest generation, it now embodies the zeitgeist of the contemporary world.

To gain a clearer understanding of the singularity of Gen Z, Gen Zers are often compared to their slightly older Millennial counterparts. As the table above shows, both generations emerged during the age of 'internet everywhere', however, while older Millennials grew up as children prior to the Internet's rapid emergence (from the mid-90s onwards), Gen Zers started to be born during the period when online commerce, use of mobile devices and social media was already well consolidated (from around 2005 onwards). As a result, in contrast to older generations, Gen Zers can truly be referred to as 'digital natives' as they have never known a time without the internet.

Furthermore, as the primary research for this study shows, major issues that have grown in importance since the start of the 21st century, such as globalisation, the 2008 financial crisis, terrorism, climate change, and technology have played a strong role in shaping Gen Zers' attitudes and beliefs. A hyper-connected generation, Gen Z grew up in an era of unprecedented awareness about human behaviour, personal health, technology and humankind's impact on the environment.

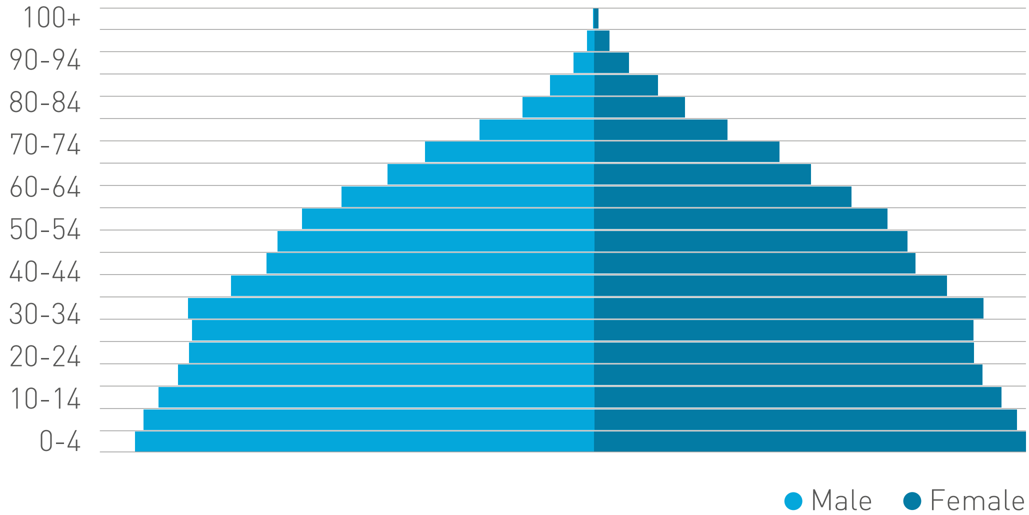
For this reason, while Millennials are often referred to as the 'Me-Generation' due to their individualist outlook on the world, many have observed that Gen Zers show greater interest in collectivist action. Whether through online forums or in the streets, Gen Z appears to have embraced activism and progressive ideas, showing a stronger interest than their older counterparts in themes, such as diversity, sustainability and personal empowerment. As they grow, Gen Zers will gradually exert a greater influence on global consumer culture and current affairs, helping to set the agenda for the decades ahead. The issues and values shaping their global outlook are explored further in Section 1.5.

1.4 THE DEMOGRAPHICS OF GENERATION Z

1.4.1 Generation Z as a share of the global population.

Taken on a global scale as the pyramid below shows, the world's population is youthful,[10] with those aged 20 and under, representing the greatest share of the global population:

Figure 2: Age distribution of the world's population, 2020

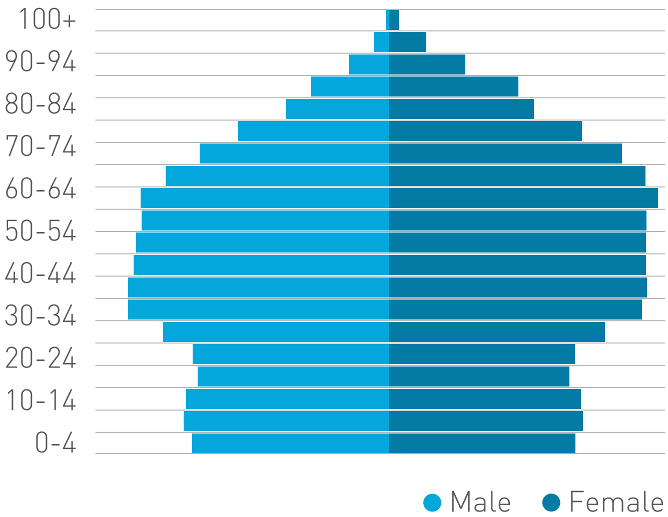


Source: United Nations DESA (2020), World: Population in 2020, available at https://population.un.org/wpp/

1.4.2 Generation Z population share: regional comparison.

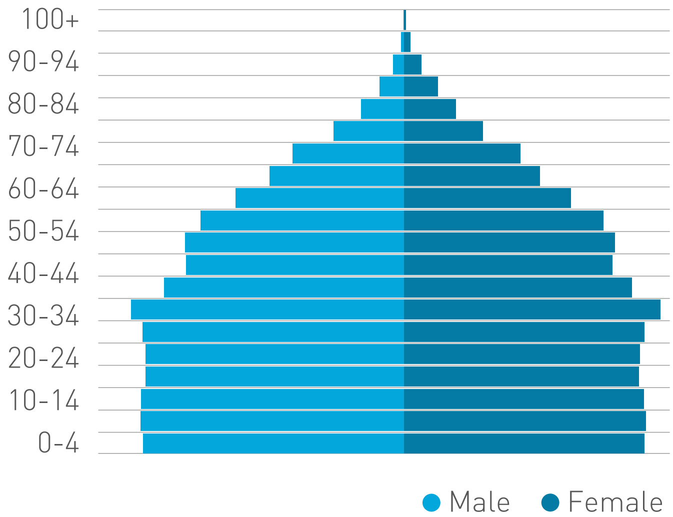
Nevertheless, as the diagrams below show, Gen Zers as a share of the general population varies significantly from country to country and by world region. Note the contrast between the population age structure between Europe[11] and Asia;[12] with the largest share of Europe's population aged between 30-50 years, and the largest share of Asia's population aged 30 and under. This trend is even more strongly pronounced in the population age structure of Africa,[13] where Gen Zers represent more than 35% of the population.

Figure 3: Age distribution of Europe's population, 2020



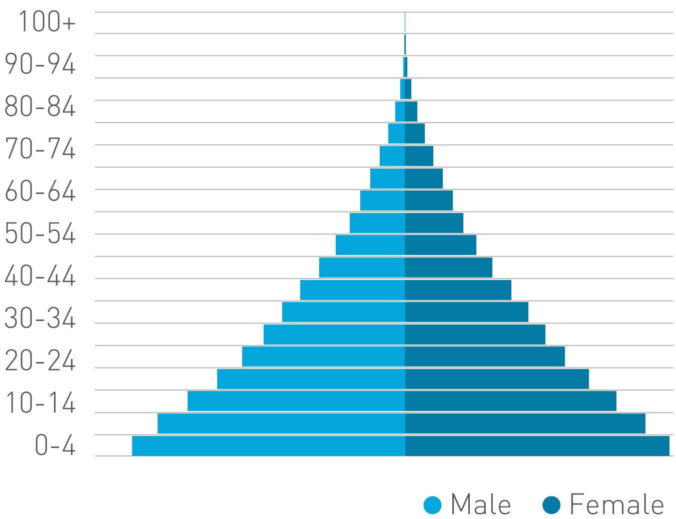
Source: Ibid United Nations DESA (2020)

Figure 4: Age distribution of Asia's population 2020



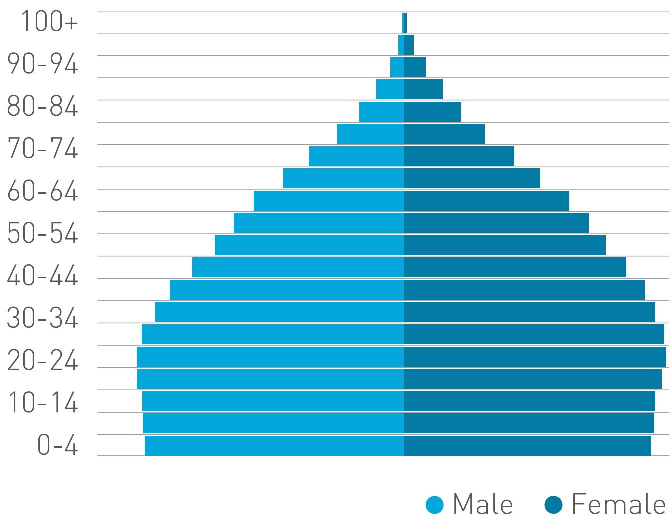
Source: Ibid United Nations DESA (2020)

Figure 5: Age distribution of Africa's population, 2020



Source: Ibid United Nations DESA (2020)

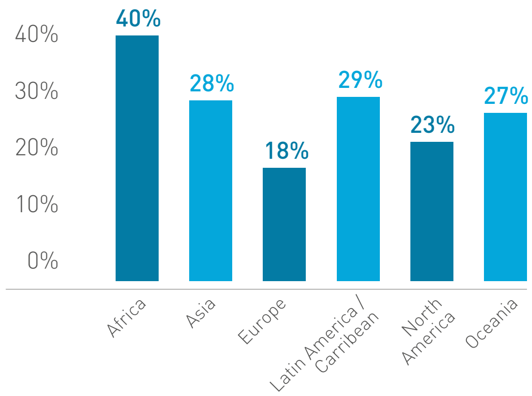
Figure 6: Age distribution of the population of LAC, 2020



Source: Ibid United Nations DESA (2020)

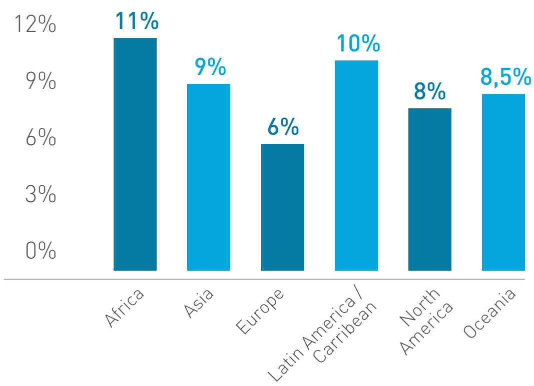
The graph below uses data from the United Nations to show how the Gen Z population (in this case, using available data for ages 7 to 24) is distributed around the world. Crucially, it illustrates clearly that Africa has the most youthful population as a share of the total population, which partly explains why many commentators have observed that the coming decades could see the 'rise of Africa' as African[14] economies grow, leading to growth in outbound travel from African countries. Besides Africa, Asia and Latin America account for nearly 2 in 3 of the world's Gen Zers. Though the modern concept of youth travel originated in post-World War II Europe, today Europe is the region with the smallest share of Gen Z population, at just over 15%.

Figure 7: Share of the population of Gen Z (age 7-24) by world region



Source: Ibid United Nations DESA (2020)

Figure 8: Share of population aged 18-23 by world region



Source: Ibid United Nations DESA (2020)

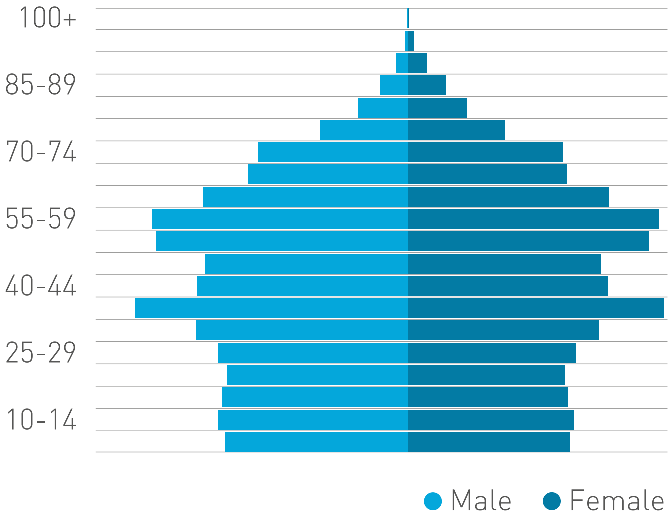
Comparing the first graph (Figure 6) with the second graph (Figure 7) shows that while the distribution of older Gen Zers is in similar proportion, it also underlines how youthful Africa's population is; while nearly 40% of the world's Gen Zers (aged 7-24) are in Africa, the proportion of these who are of independent consumer age (18-23) is much less, at 11%.

Figure 6 illustrates how youthful Africa's population is - nearly 40% of the population in Africa consists of Gen Zers. However, as shown in Figure 7, the proportion of African Gen Zers who are of independent consumer age (18-23) is much less, at 11%. The second graph also shows that the distribution of older Gen Zers resembles the general distribution of the world's young population, where Europe is the area with smallest share of this age group, and Africa is the youngest continent.

1.4.3 Generation Z population share: comparison of four outbound markets

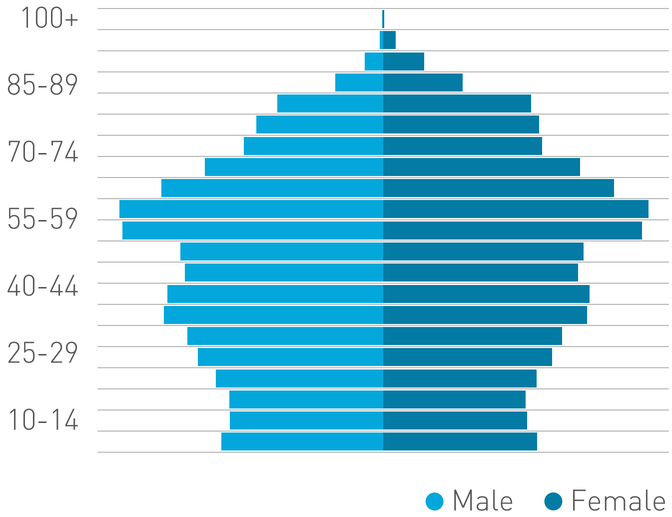
The four population pyramids below show the population structure of the four outbound markets that are the subject of primary research for this study; China,[15] Germany,[16] the United States[17] and the United Kingdom:[18]

Figure 9: Age distribution of China's population, 2020



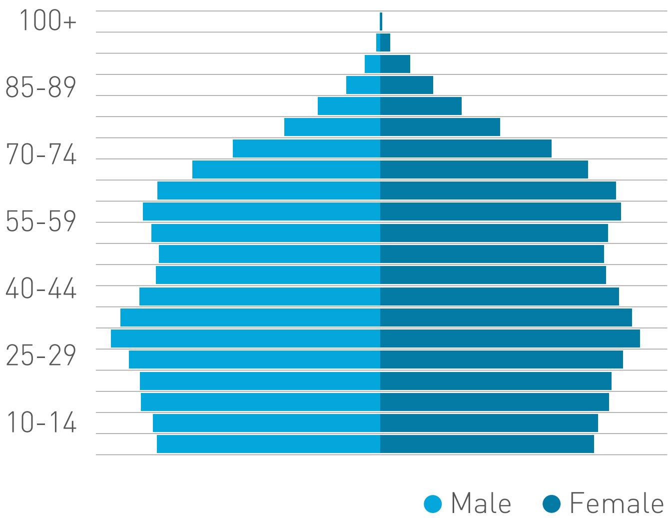
Source: Ibid United Nations DESA (2020)

Figure 10: Age distribution of Germany's population, 2020



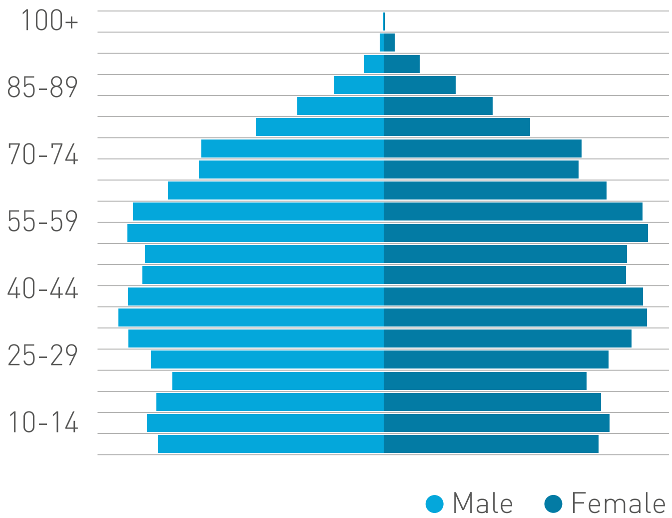
Source: Ibid United Nations DESA (2020)

Figure 11: Age distribution of US' population, 2020



Source: Ibid United Nations DESA (2020)

Figure 12: Age distribution of UK's population, 2020



Source: Ibid United Nations DESA (2020)

It can be observed that all four countries have a roughly similar age structure; with ageing populations, and a particularly large share of adults in their 40s and 50s (this is especially pronounced in the German population). Except for Germany and the UK, the share of children (aged 2-12) and teenagers (aged 13-19) has gradually diminished, however the size of each Gen Z population must also be taken into account. Based on the total population of each country and the respective percentage representation of Gen Z, according to data from the United Nations Department of Economic and Social Affairs, in 2019 the size of the Chinese population aged 7-24 (the age range for which figures are available) was 310 million, while in Germany it was 14 million, in the US it was 76 million and in the UK 14 million.

Furthermore, it must be noted that while this data only indicates the size of the Gen Z population, it does not indicate the size of the Gen Z population that is in a position to travel independently. This figure is difficult to determine as few young consumers have a disposable income. Furthermore, it must also be noted that there is a considerable disparity of incomes and access to travel opportunities across all markets. For example, between Gen Z in Germany and China, it is unlikely that an equal share of the Gen Z population in each country would be in a position to travel independently.

1.5 ISSUES AND VALUES SHAPING GENERATION Z'S GLOBAL OUTLOOK

Climate change:

Despite growing up in a period with high youth unemployment and a surge in terrorism, according to a global study by Deloitte, climate change is the most concerning topic for 1 in 3 Gen Zers today. This generation has grown up during an era of unprecedented awareness about the impact of global warming on the planet's climate and biodiversity. An increasing array of extreme weather events and natural disasters around the world have been linked to climate change, and the issue has risen sharply up the political agenda, partly due to Gen Zers taking direct political action.[19]

The Swedish activist Greta Thunberg (aged 17 at the time of publication) has become a well-known global figure who has led the global school-strike movement and has inspired millions of young people around the world to take action on climate change and mitigate their own impact on the environment wherever possible. Partly as a result of this, awareness has risen sharply. Today in Europe and North America almost half of this generation is pessimistic towards the environmental future of the planet, while in APAC it is "only" 20%.

Gender equality, sexual orientation and gender identity:

The contemporary dynamics of liberal policies, equality and diversity have influenced highly Gen Zers and has led to a shift away from traditional views on gender roles. For example, one study in the UK shows that 84% of Gen Zers disagree with traditional gender roles.[20] Moreover, Generation Z together with Millennials are more tolerant; 72% and 69% respectively do not have problems with homosexual relationships, compared with 43% of Baby Boomers.[21] Meanwhile, a global study of over 20,000 Gen Zers from 20 countries found that 63% of young people globally believe that same-sex marriage should be legal and that 74% of young people globally believe that transgender people should have the same rights as non-transgender people.[22]

Race and ethnicity:

A stronger regard for self-expression and greater visibility brought about by online media as well as the rapid globalisation of the last 20 years has resulted in Generation Z being the most diverse generation in history. This is particularly noticeable in the United States, and to a lesser extent in other advanced economies that have seen high levels of immigration. For example, a study in the US found that nearly six-in-ten American Gen Zers stated that racial and ethnic diversity is positive for society, while 52% of Gen Xers and an even smaller share of Baby Boomers agreed with this statement.[23]

Today, in the US, a higher percentage of Gen Zers compared to older generations identify themselves as Hispanic (22%) or Black/African American (15%).[24] Growing up in such a diverse environment, as well as curiosity about their cultural routes has made Gen Z a generation that is interested in different cultures and countries, which explains their strive for diversity and equality. It is also believed that this interest among US Gen Zers has driven up the consumption of more diverse international food and drinks.[25] The constant connectivity to the Internet and social media has also stimulated a homogenisation process among Gen Zers, resulting in greater similarities in behaviour and interests compared with older generations.[26] It is important to note that, when addressing the diversity topic, Gen Zers do not focus solely on demographics, lifestyle or faith aspects. For example, tolerance, inclusiveness, openness, and freedom of expression are other important aspects that are critical for this generation too.[27]

Personal health and wellbeing:

The Internet, the vast possibilities of gaining knowledge and the recent movements about healthy life have highly influenced Gen Zer's behaviour. A global study of Gen Zers from 20 countries found that 94% of the respondents stated that the leading contributor to being happy was feeling healthy, both physically and mentally.[28]

Furthermore, in contrast to common perceptions about alcohol consumption among young people, just 15% of surveyed US Gen Zers aged 18-22 stated that they drink alcohol once a week, compared to 28% of Millennials and 36% of Baby Boomers.[29] In fact, 36% of Gen Zers aged 18-22 say that they never drink alcohol, while over 50% say they go jogging once a week or more.[30]

Personal care and image:

The need for acceptance and belonging is particularly important for Gen Z. According to data by GlobalWebIndex, Gen Zers are 17% more likely to be influenced by other people's opinion than older generations, while 73% believe that "it is important to feel respected by others".[31] Partly as a consequence of this, Gen Zers appear to invest a lot in products related to self-care, such as healthy foods, beauty, skincare products and gym membership. It is also important to note the relationship between this mindset and the fact that these products have a strong presence on social media where Gen Zers spend a considerable amount of time, using social media posts to test, review and show products off to their followers.

Privacy and trust:

Interestingly, Gen X and Millennials have grown up as less trusting than previous generations, however Gen Z appears to break this pattern. While only 26% state that "other people can be trusted", compared with Millennials at an equivalent point in 2006, Gen Zers are actually entering into adulthood more trusting than their older counterparts.[32] Nonetheless, Gen Zers do appear to have wide-ranging concerns regarding their privacy and presence on the Internet.[33]

The issue of trust also extends to the brands that Gen Zers deal with. While, in a similar way to Millennials, Gen Z's attitude towards companies depends a lot on personal preferences, increasingly often it is related to the company's impact on society. Furthermore, as the generation raised in the era of "fake news" and misinformation, trust and authenticity are essential for Gen Z. In return for their loyalty, they expect that businesses will value their opinion and beliefs.[34] Gen Zers also tend to research products extensively before purchase, seeking reassurance on a product's ethical credentials before buying. In this regard, 65% state that they check the origins and back-story of a product before purchase, making Gen Z a segment that is starting to hold companies to a higher standard of accountability.[35]

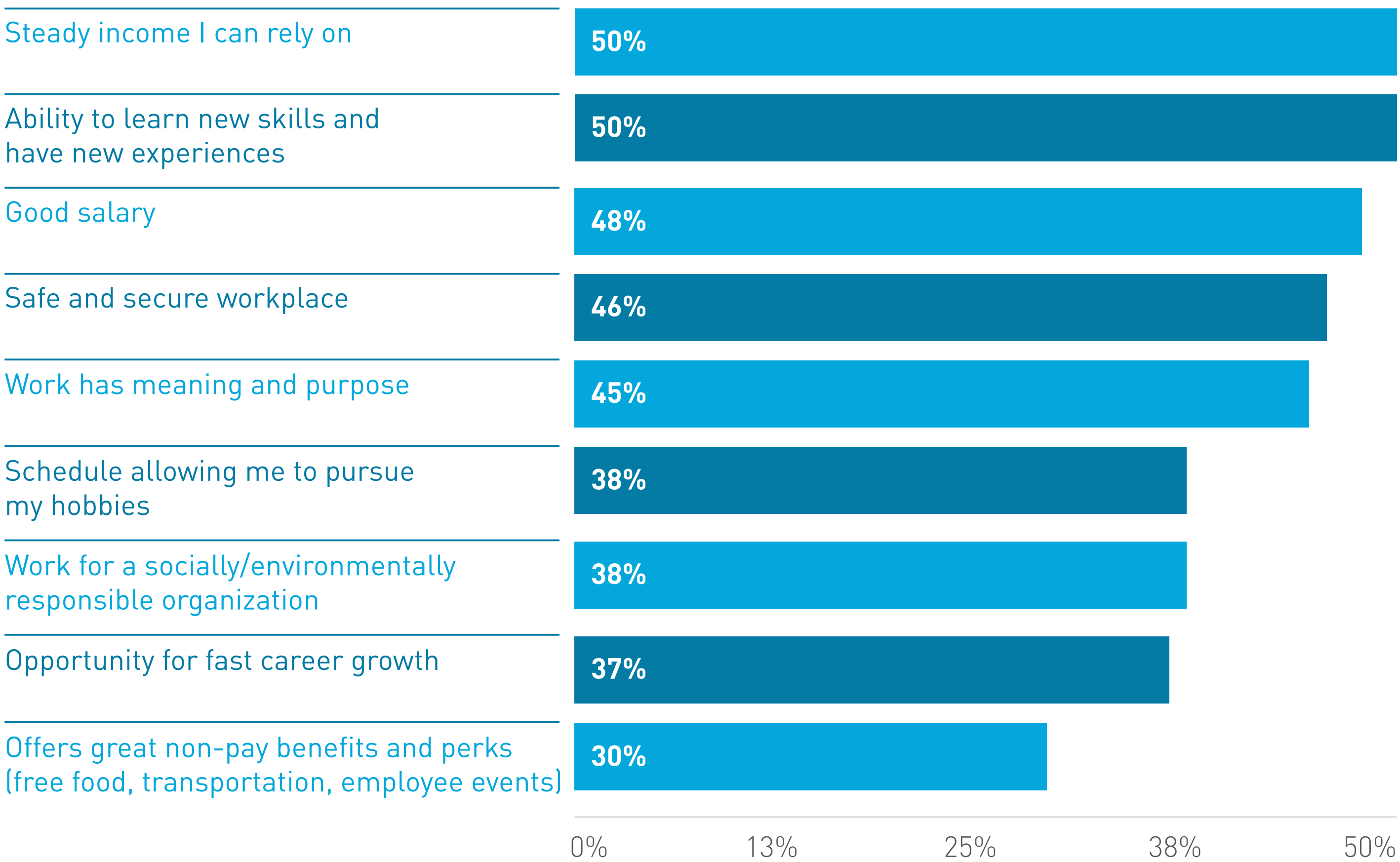
Access over ownership:

Similar to Millennials, Gen Zers value independence and flexibility highly, given that these generations have both grown up during the era of digitisation, location-independent work and the flexibility that online booking brings. This, as well as a lack of disposable income, have led to them fully embracing the collaborative economy. As a result, they are highly open-minded about sharing or renting their cars, homes, clothes, equipment.[36]

Careers and the workplace:

Being raised in a major economic crisis has influenced on many different levels Gen Z, especially with regards to their career expectations. For example, a recent report by Dell Technologies indicated that, 94% of students across 10 countries currently have concerns about starting work,[37] while a similar surey by Deloitte covering 10 countries states that dissatisfaction with pay, lack of advancement and few development opportunities are the major reasons for older Gen Zers leaving their job.[38] Despite a "good salary" being a fundamental aspect when choosing a job, Gen Zers also appear to value highly non-monetary factors.[39] These include the meaning and purpose of a job, environmentally-friendly initiatives and stimulating social environment in the workplace. Moreover, the importance of technology can also be detected in their career decision-making process.[40] Additionally, while good pay and a positive culture within the organisation may attract Gen Zers, providing them flexibility and diversity would also be likely to keep youngsters engaged and loyal to a company.[41]

Figure 13: The importance of work-related factors for Gen Z



Source: Dell Technologies (2019), Gen Z: The future has arrived

1.6 GENERATION Z: TECHNOLOGY AND TRAVEL

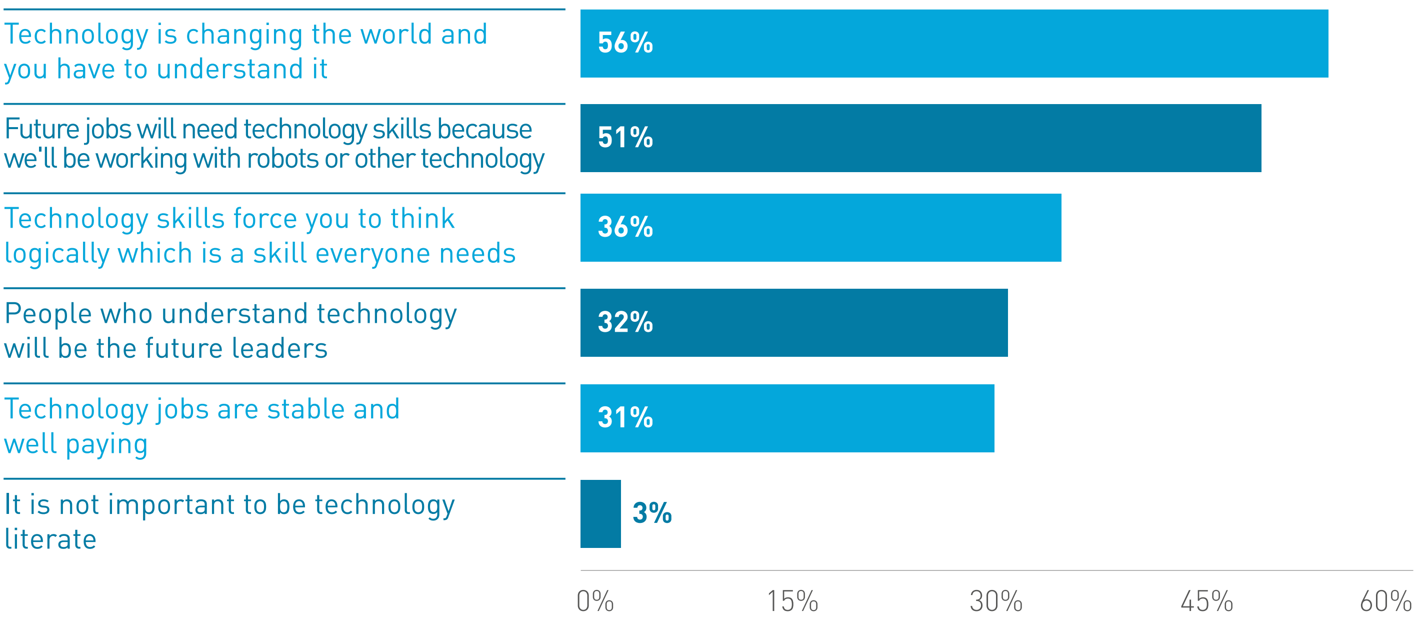
1.6.1 Relationship with technology

As discussed earlier in this chapter, Gen Z can be considered as the first generation to be digital natives, ensuring their embrace of technology from an early age. This is already demonstrated by research; a study across 45 countries, has shown that around 64% of Gen Zers state that they are 'constantly online', and 57% stated that they feel more insecure without their mobile phone than without their wallet.[42] According to the same study, this is also the generation that spends on average the longest time per day on their mobile phones: 4 hours and 15 minutes.[43]

This could also be explained by the early adoption of mobile devices; many Millennials first discovered the Internet only through a P.C. and a slow dial-up connection. Gen Zers have grown up as the mobile-first generation, with devices widespread at home and at school, and have benefitted from much faster and cheaper internet connections. With this in mind, it is also important to note that the rise of streaming and instant communication channels has made Gen Z the generation that socialises more frequently online, rather than offline in the real world.[44] While this phenomenon has created a generation that is highly adept at using technology, others have observed that a lack of real-world connections has helped to fuel a rise in mental health issues, such as depression and anxiety; issues which travel may contribute either to calm or exacerbate (see UK expert interview).

Given the scale of hyper-connectivity among Gen Zers, it is perhaps unsurprising that they already show a widespread understanding of technology's role in the world. As the graph from a study conducted by Dell indicates, Gen Zers show a solid awareness of how their generation will have to adapt in the future to the implications of technology for politics, society and their careers.[45]

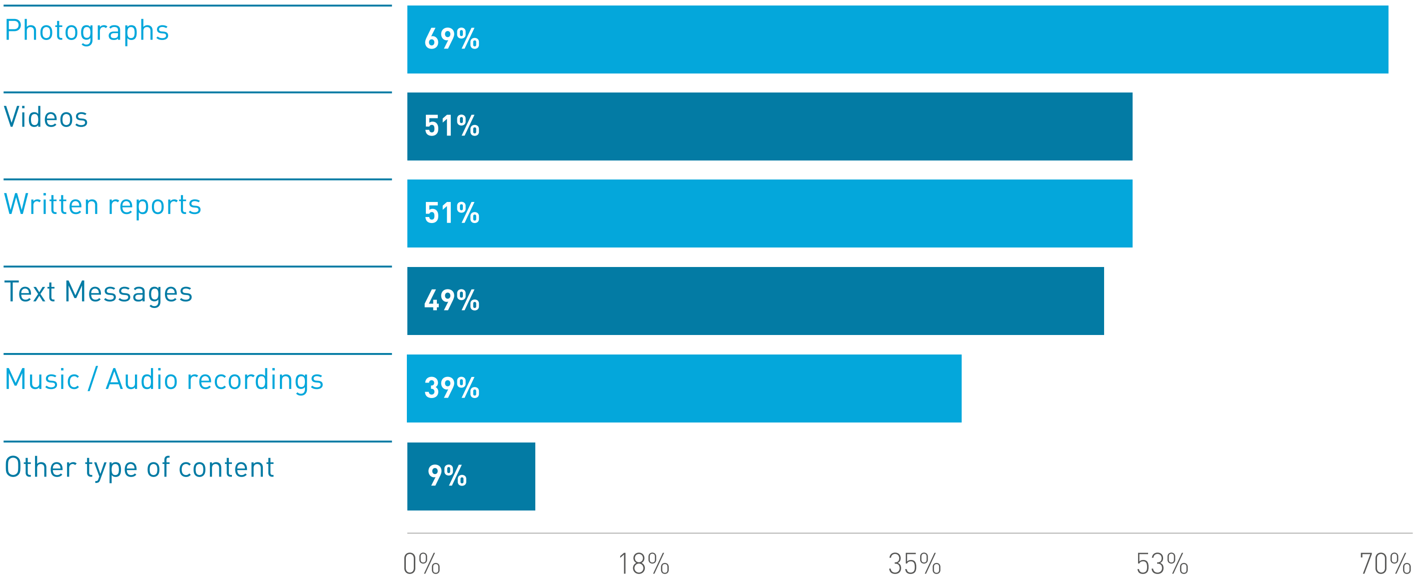
Figure 14: The importance of tech literacy according to Gen Zers



Source: Ibid Dell Technologies (2018)

Furthermore, in a similar way to Millennials, Gen Z is heavily influenced by photos and videos. As a result, social media platforms have an immense influence on their choices as consumers. Today, image-dominated platforms, such as Instagram and Pinterest are the most common source for travel inspiration.[46] When it comes to creating travel-related content, Gen Z also has a strong preference for creating photos above all other types of content.[47]

Figure 15: Most popular types of content produced by Gen Zers



Source: Commscope (2017), The Generation Z Study of Tech Intimates

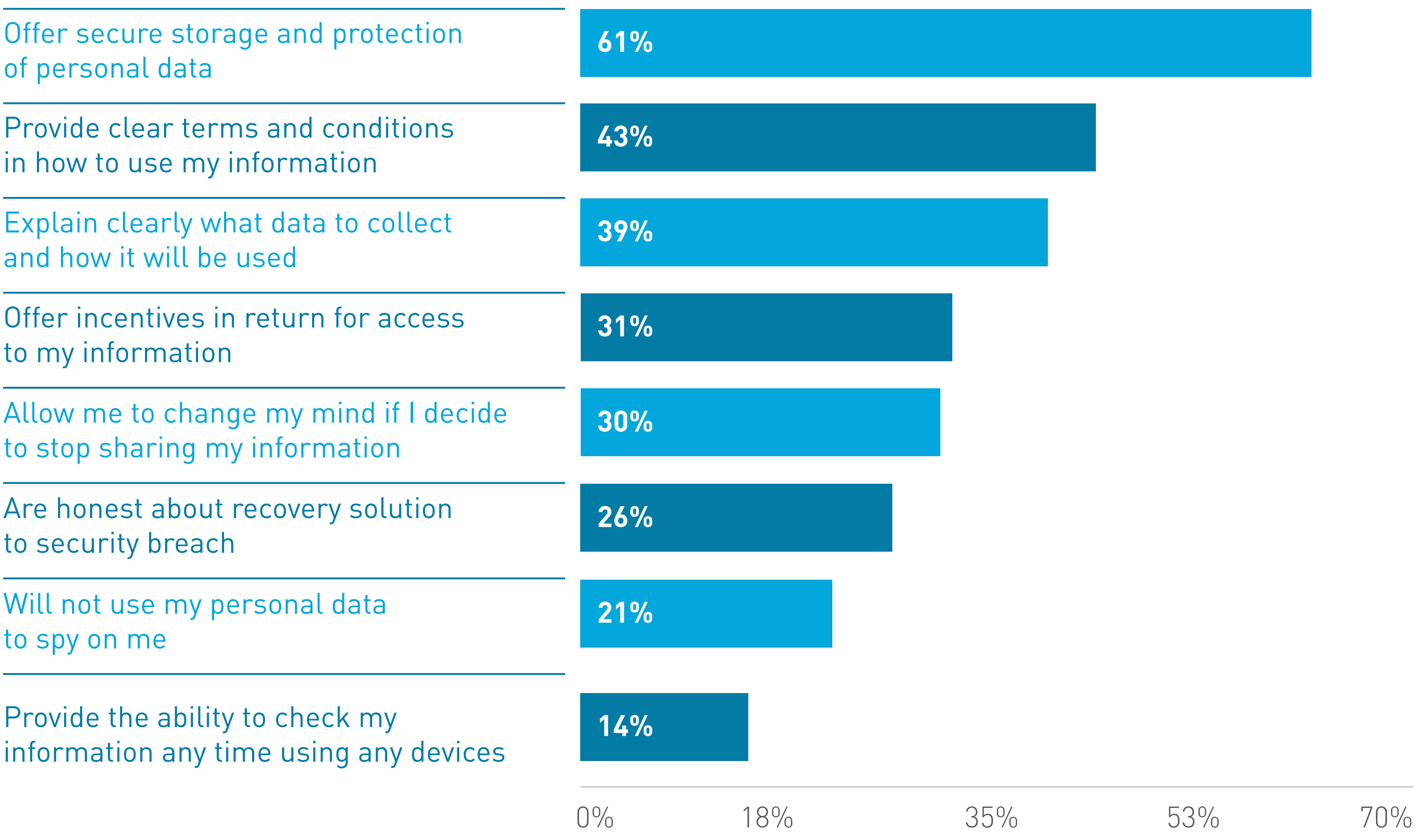
The combination of constant connectivity, as well as continual cultural and travel inspiration on their social media feeds, has helped to expand Gen Z's aspirations far beyond the traditional environment of their hometown or home country. In fact, 42% of Gen Zers have reported choosing a destination based on their social media.[48] (Further insights on this topic are provided in the consumer research for this report). During their trip, Gen Zers have reported being continually connected via their smartphone while travelling.[49] Being accustomed to making travel arrangements in real-time has increased expectations among Gen Zers of highly personalised services, as well as the possibility of making last-minute changes or upgrades.

1.6.2 Privacy and security online

Another implication of such hyper-connectedness is the widespread awareness among Gen Zers of privacy and data security.[50] This can be manifested in various ways; through social media preferences, concern over data use and general online browsing behaviour. For example, in terms of social media use, Gen Zers have pioneered the use of Snapchat, TikTok and Instagram Stories; channels which broadcast videos and images to a highly selected group of followers that are determined by the user. While Millennials and older generations are heavy users of Facebook and its more open 'broadcast' culture, Gen Z appears to prefer networks and channels that are highly curated, where they can exert strong control over who views the content that they publish. (For further information on this, please refer to Chapter 2; consumer survey and expert interviews).

In recent years, data breaches and data misuse have caused a significant surge in concerns among all generations, including Gen Z, with 60% saying that they are concerned about their personal data and 53% even preferring to be anonymous when online.[51] One of the reasons for preferring anonymity is concerns over how brands target users with advertising. One of Gen Z's biggest frustrations in this regard is the overabundance of ads online, and almost half of respondents in a global study (48%) stated that they block adverts because they are annoying/irrelevant.[52] At the same time, Gen Zers appear to place higher demands on brands for transparency about data storage and usage. Sharing purchase history details and contact information remains a source of concern; 79% said they would not share more sensitive personal data, while only 18% said they are comfortable sharing their payment information.[53] The graph below indicates under what conditions Gen Zers are willing to share their personal information with brands.

Figure 16: Gen Zers' attitudes towards data, privacy and its use by brands



Source: IBM Institute for Business Value (2017), Uniquely Generation Z

1.7 MARKET FOCUS

The following section outlines the socio-economic context for the four Gen Z outbound markets that are studied in detail in Section 2 – 'Gen Z Travel Trends', based on the secondary research findings available. Since different studies capture different aspects of each market, the findings cannot necessarily be compared directly, however they do allow us to build a picture of the main issues identified among Gen Z consumers in each market.

1.7.1 Generation Z in China

Having been raised in a major economic crisis and in an insecure environment regarding their future career development, Gen Zers have generally become steadily more careful about their spending. However, this does not necessarily apply to all outbound markets. For example, in China, Gen Z accounts for 13% of total household spending.[54] This is a trend mainly related to Chinese Gen Zers, as this group grew up in a period of significant economic growth, which also explains their generally positive outlook on the future. On the other hand, looking at European travellers, their share of household spending is relatively small at 3% for the UK and 4% for Germany.[55]

While the Western world struggled with the 2008 economic crisis, from a young age, Chinese Gen Zers witnessed the rapid rise of their country as a political and economic superpower. Growing household income in China and the rapid development of e-commerce in the country have created a generation that embraces consumerism. Following the one-child policy, most Gen Zers are the only child of the family which means that they usually receive generous financial support from their parents. The prosperous context in which they grew up also makes them more optimistic about the future. Growing up with social media apps, such as Weibo and WeChat explains why Generation Z is very influenced by their peers, but also has the effect of helping them to strengthen their personal identity.

A review of literature also found that:

- When it comes to choosing travel destinations, 96% of Chinese Gen Zers say social media plays a role in influencing them, more than any other generation.[56]
- Gen Zers prefer products that offer value and reflect real life. To gain their respect and loyalty brands need to show their commitments and create a business model that is built on sustainability, equality and acceptance.[57]
- This group places a higher value on secondary factors, such as curation, style, convenience and range.[58]
- Over 11% of Gen Z respondents in China strongly agree that they "would rather spend money on experiences than products" as compared to 6 - 7% in older generations.[59]

1.7.2 Generation Z in Germany

Similar to Gen Zers in other European countries, German Gen Zers have grown up during a time of relative economic instability, as well as growing concerns around the effects of climate change and how it is to be mitigated in the future.

Compared to their global counterparts:[60]

- They are less inclined to believe institutions and individuals should do more to protect people's data (partly explained by Germans of the post-Cold War and WWII generations being particularly concerned by this issue).
- They have a stronger desire to create a family and have children in the future.

A review of literature also found that:[61]

- 42% of German Gen Zers are "always active" and use constantly a smartphone.
- YouTube and Instagram are the most used social networks, with 69% and 65% respectively.
- 60% perceive social media advertising as annoying, and only 25% watch advertising on social media when it is interesting for them.
- Food and drink are the most important aspects of a vacation.
- When travelling, they also appreciate sports, entertainment and knowledge of German.[62]

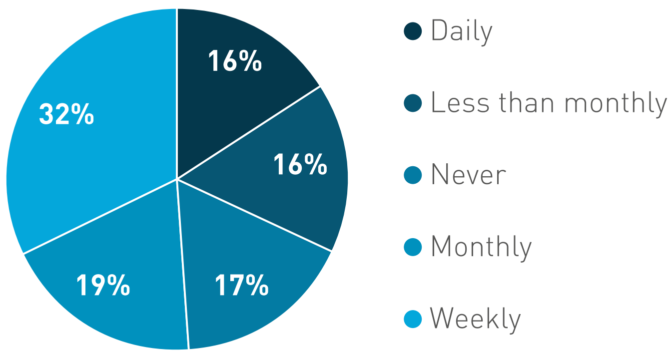
1.7.3 Generation Z in the United Kingdom

Growing up in the UK when the country's economy was hit hard by the 2008 financial crisis, the subsequent austerity measures, and the Brexit referendum of June 2016 – in which the majority of Gen Zers did not have the opportunity to vote – proved to be a particularly defining milestone for British Gen Zers. This, combined with job insecurity and a lack of career opportunities seem to become three of the major concerns for British youngsters. It is also important to note that Gen Z is now the most ethnically diverse age segment of the British population and as a whole, they have become more in tune with progressive ideas and activism.

A review of literature found that:[63]

- 16% of UK students feel lonely every day,while 32% feel lonely weekly. Mental health is also one of their top three concerns.
- British Gen Zers in higher education were particularly concerned about the challenge of finding a job after graduation and gaining work experience
- The groups that have the most influence on British Gen Zers are friends (78%) and family (89%)
- The fact that Gen Z is the most ethically diverse generation in the UK appears to influence British Gen Zers' attitudes, which are widely supportive of policies and ideas related to diversity and equality. Furthermore, 58% of British Gen Zers believe that making a greater contribution to society is important.
- This is a very tech-driven generation which spends half of its time connected online.Two-thirds of UK Gen Zers state that they multitask across multiple devices.

Figure 17: Loneliness among student Gen Zers



Source: Wonkhe (2019) Only the lonely- The Secret Life of Students

Figure 18: Index of diversity and progressive values among British Gen Zers

GEN Z IN THE UK

77%
support same sex marriage rights

80%
support transgender equality

90%
believe men and women should be treated equally

1.7.4 Generation Z in the United States

Gen Z grew up in the midst of the War on Terror and does not remember a time before the epoch-defining events of September 11th, 2001. They also experienced the economic crisis of 2008 and saw relatives and family members lose their jobs while their Millennial siblings were forced to move back home due to spiralling accommodation costs. At the same time, the growing wealth gap, rising costs of housing, transport, healthcare and the increasing indebtedness due to raising education tuition fees, has defined the view of this generation on aspects, such as work, future, values, and expectations.

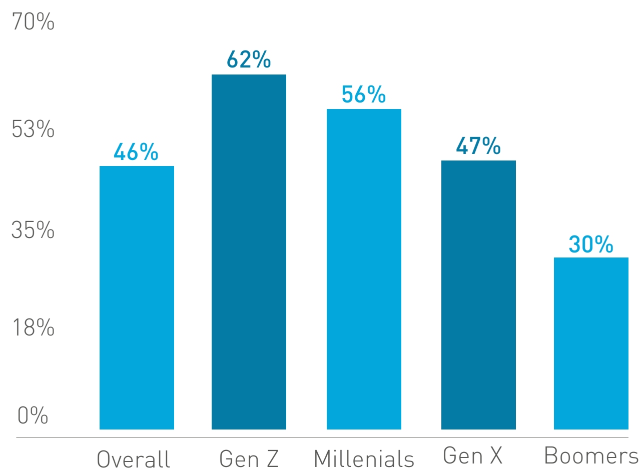
A review of literature found that:

- Gen Z is the most ethnically and racially diverse generation in US history.[64]
- 42% of American Gen Zers state that they interact more with their phones than they do with people.[65]
- They have high aspirations for their future career path; 75% rate their dream job having a sense of purpose ahead of a high pay cheque.[66]
- 49% get their daily news from social media, the majority through YouTube.[67]
- They prefer personalised experiences, not only concerning their consuming habits but also concerning their career.[68]
- Diversity matters to them through many dimensions, and is not just limited to race and gender, but also related to personal identity and sexual orientation.[69]

Regarding US Gen Z travel habits, the following points were also identified:

- They have a stronger tendency (37%) to book a flight after receiving a personalised notification.[70]
- Gen Zers are the generation most likely (62%) to embrace the sharing economy.[71]

Figure 19: Popularity of short term accommodation rentals among different generations of US travellers



Source: Mastercard (2018) 2019 Travel Trends and Expectation

1.8 SPECIAL SECTION ON THE IMPACT OF COVID-19

Background

The research for this report was carried out during the period October 2019 to January 2020, prior to the outbreak of the coronavirus in Europe and the subsequent consequences for the European travel industry that took hold. While the full effects of this unprecedented event on Generation Z and the European tourism sector are yet to be fully understood, the authors have included some preliminary research relating to this topic that had emerged by April 2020.

Covid-19 and Generation Z in context

As has been indicated throughout this report, Gen Z has grown up in very turbulent times, where climate change, financial crisis, and terrorism were constant topics in media and society, amplified and shared in real-time by social media. Consequently, Gen Zers have become quite conscious of their spending and consumer behaviour. Furthermore, as confirmed by the experts interviewed for this study, these events have also contributed to making Gen Zers a comparatively nervous and sober generation. Today, in their formative years, the current coronavirus outbreak crisis has disrupted almost every area of public life. Gen Zers around the world are facing disruption to their education, careers and future job prospects, while fearing for their health (already a major issue for this generation) and the health of their loved ones. Meanwhile, traditional and social media have become largely saturated with news and views on coronavirus and its effects on daily life.

Preliminary desk research findings on Covid-19 and its effects on Generation Z as travellers:

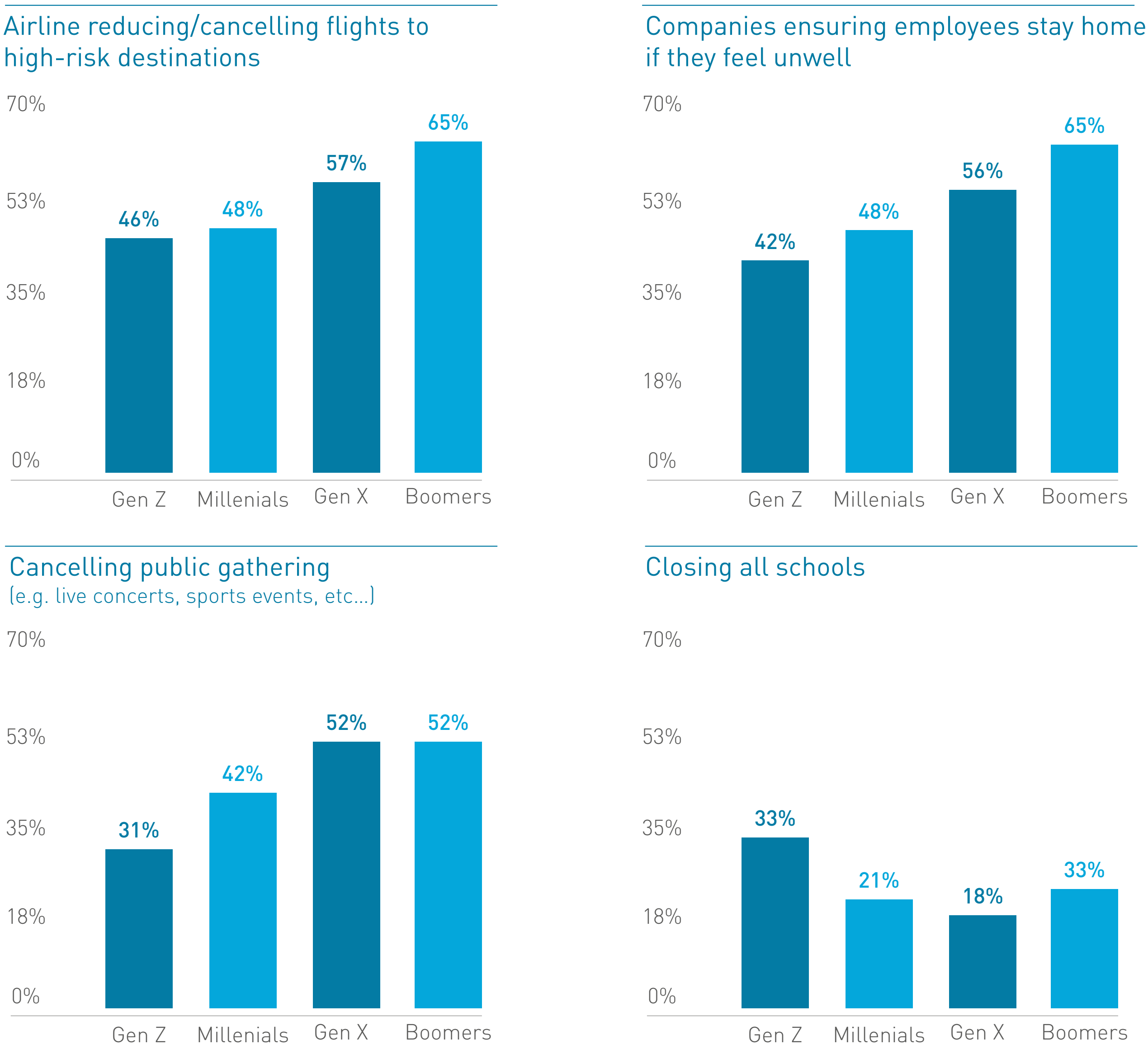
- **Effects on spending:**

  According to a First Insight survey, 41% of American Gen Zers [72] stated that they will cut back on spending, making it the segment which is the most concerned about their finances, while 49% [73] indicate that their purchase decisions had been impacted by the current crisis. Such results are understandable, as this is the generation with the least purchasing power and has already been impacted significantly by the recent economic crisis and austerity measures.

- **Gen Zers' attitude towards the lockdown measures:**

  During the initial stages of the COVID-19 crisis in the US, in the middle of March, alarming videos and photos[74] of huge gatherings on the beaches of Florida emerged, where youngsters seemed not to pay enough attention to the lockdown measures. As a result, the US coronavirus task force, addressed American Gen Zers directly regarding the importance of "social distancing".[75] Similarly, a senior advisor to the WHO Director General stressed that he was terrified by the attitude of young people in the current situation.[76] Moreover, a New York Times article titled "Young, Confident and Flying, Virus Be Damned"[77] argued that while travel was still possible, Gen Zers had tried to take advantage of the current low travel prices and embark on trips, apparently without regard for the consequences. Following this, a recently published study focused on the influence of the coronavirus crisis on British and American consumers, highlighted that Gen Zers are the generation that is the least supportive of the restrictive measures adopted for the COVID-19 outbreak.[78]

Figure 20: Preferred methods to contain the spread of Covid-19, by generation



Source: GlobelWebIndex (2020) Coronavirus Research | March 2020

Although these notions could be perceived as a clash between generations and essentially labelling Gen Zers as selfish, it could be argued that such attitudes are related to the recent economic crisis and the unstable financial situation of this generation. During the first phase of the implementation of travel restriction measures in mid-March 2020, the staggering drop in flight and accommodation rates caused by the lockdown was (briefly) perceived by Gen Zers as a perfect opportunity to travel and experience places which otherwise they would not be able to afford. Furthermore, it is important to note that attitudes and experience around the effects of Covid-19 are constantly changing, as the effects of public health measures on consumers' ability to travel.

- **Attitudes towards travel and freedom:**

  A study by GlobalWebIndex found that British and American Zers are also the generation that appears to have the least support for the closure of tourist attractions and international borders.[79] Interestingly, the same research also states that, in contrast to American youngsters, British Gen Zers believe that individuals have a bigger responsibility for managing the spread of the virus than the government.[80]

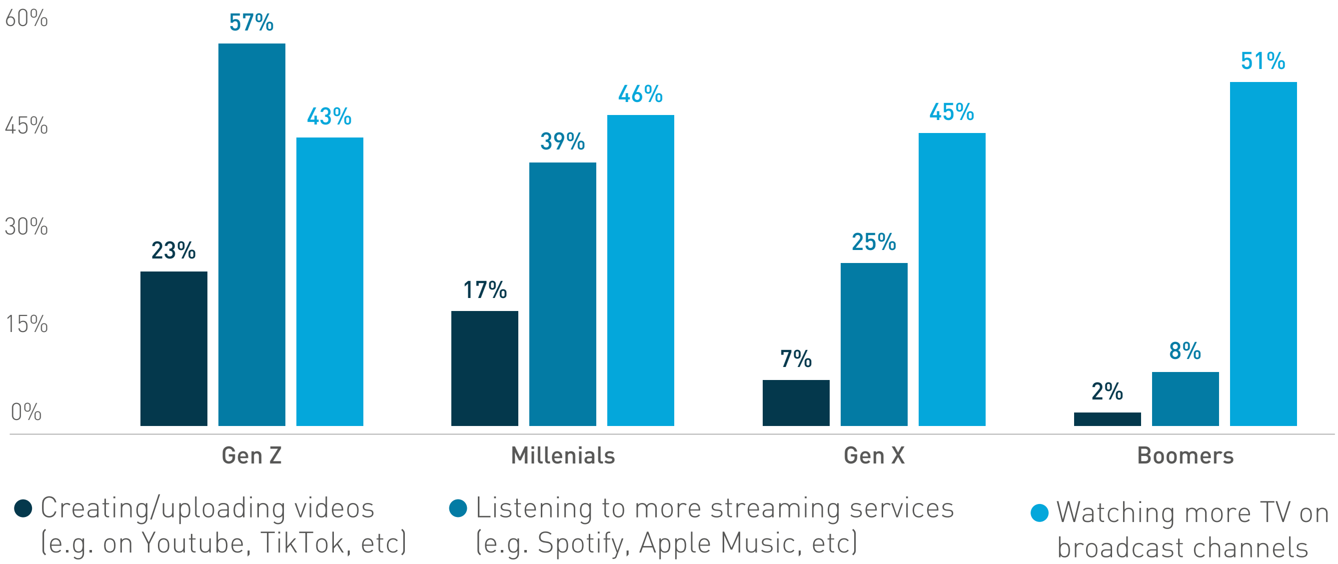
- **Effects on Gen Zers' world views:**

  Given how unprecedented and disruptive they have been to daily life, the public health measures taken to slow the spread of the coronavirus, as well as their presence across the media are likely to have a significant psychological impact on Gen Zers. As explained elsewhere in this report, Gen Zers show a higher rate of awareness around mental health. They also demonstrate higher rates of depression[81] and loneliness[82] too. For this reason, measures like social distancing could have a significant impact on the mental health of youngsters. In another recent study covering 14 countries globally, 57% of Gen Zers highlight that now they spend more time socialising and reconnecting with their family as a result of lockdown measures.[83]

- **The role of social media:**

  More than 50% of Gen Zers state that they expected to spend more time time on social media, messaging services, or apps, whereas this is not as universally applicable for other generations.[84] Besides that, Gen Z is also the segment which shows the highest level of expecations around the role of social media in helping society to cope with the challenges of the COVID-19 situation. The above-mentioned results indicate how important mobile phones and social media are in the life of Gen Zers, and their added importance in the lives of youngsters, especially during a crisis.

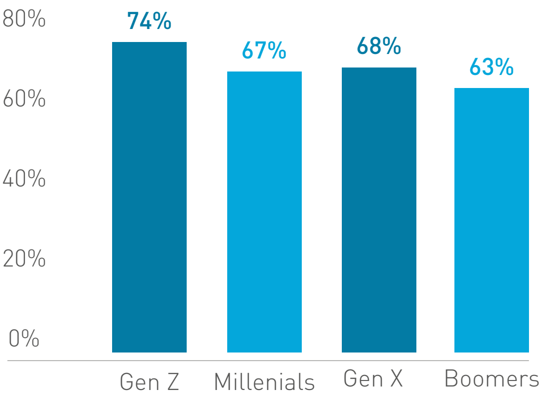
Figure 21: Changes in media consumption habits by generation



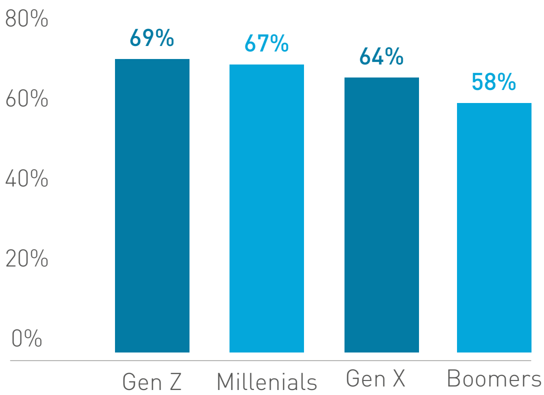
Source: GlobalWebIndex (2020) Coronavirus Research | March 2020 Release 3: Multi-market research

Figure 22: Use of social media by generation in coping with the Covid-19 pandemic

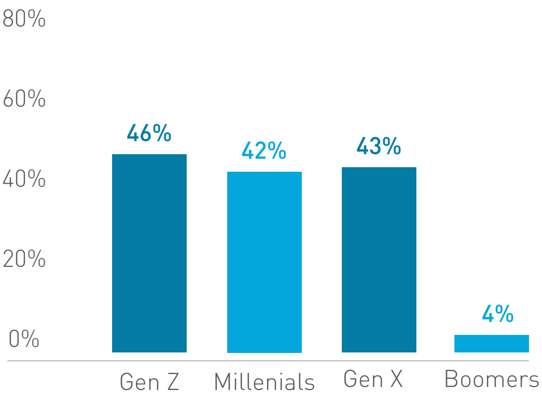
Providing fact-checked content to help people cope with the outbreak



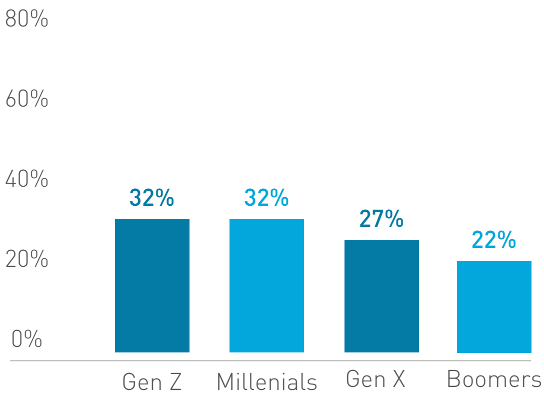
Screening "fake news"



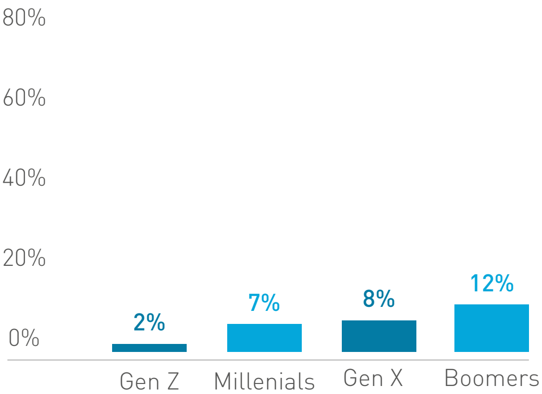
Helping neighbors and local communities to connect with each other



Provide live-streams of events



None of these



Source: Ibid GlobalWebIndex (2020)

CHAPTER 2

GEN Z TRAVEL TRENDS

2. GEN Z TRAVEL TRENDS

2.1 PRIMARY RESEARCH – OVERVIEW

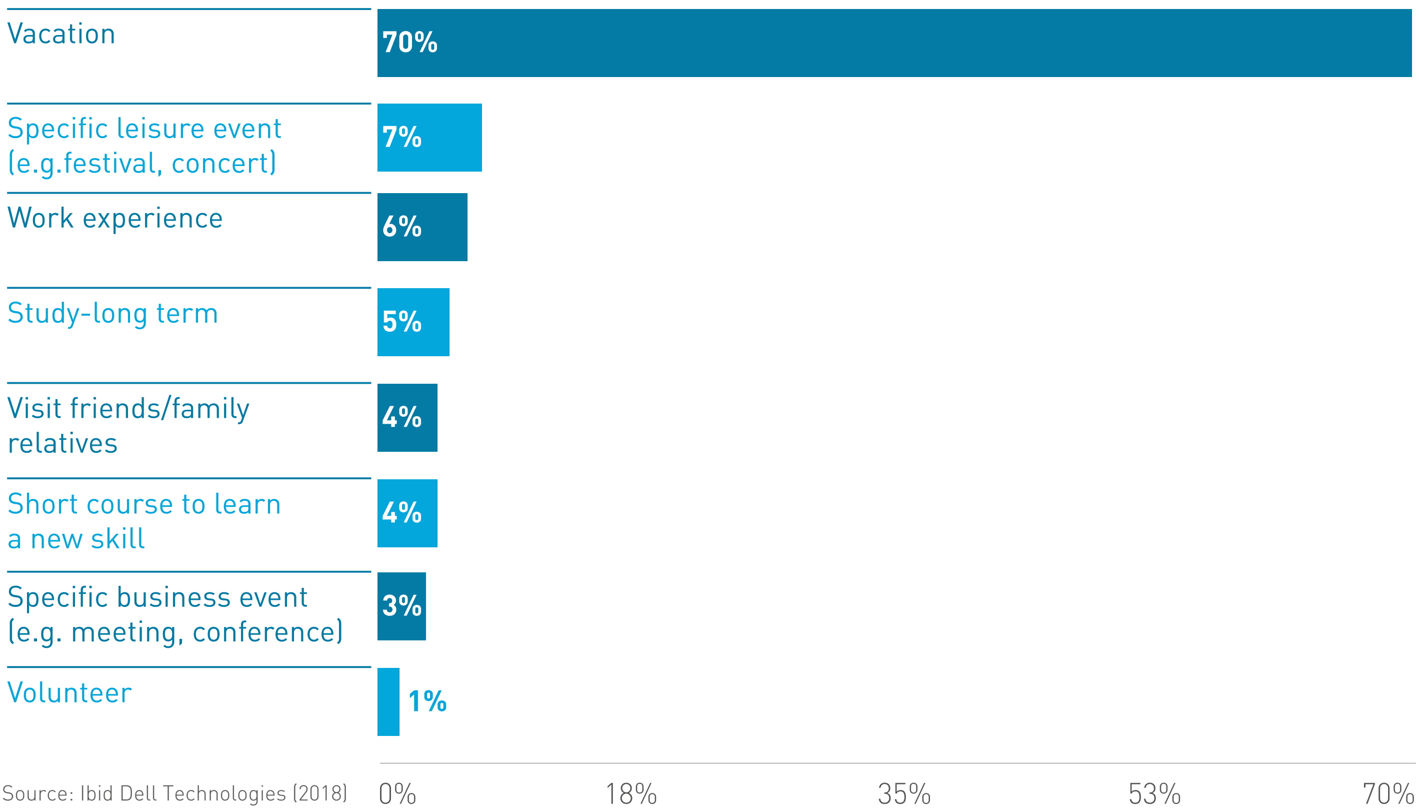
The following section includes results from the qualitative and quantitative research conducted for this study. The quantitative research consisted of online consumer surveys carried out among 700 respondents from each of the four focus markets: China, Germany, the United Kingdom, and the United States. The online surveys were carried out between December 2019 and January 2020, while the qualitative research consisted of an interview with one expert from each of the markets, with interviews conducted during the same period. A full description of the methodology used is provided in Annex 1.

The survey results are presented in three sections, each of them addressing topics that are relevant to the travel decision making process for Gen Zers. Additionally, the study also includes a "post-trip appraisal" analysis provided by TCI Research, a market research company (https://tci-research.com/), which showcases the satisfaction level of Gen Zers with certain aspects related to their travel experience in Europe. The final section of this chapter is dedicated to expert interviews, including experts' perspectives on the trends and factors that will define Gen Z's travel habits in the future.

2.2. KEY MOTIVATIONS FOR TRAVELLING TO/WITHIN EUROPE AND IN-DESTINATION CHOICES

2.2.1 Purpose of visit

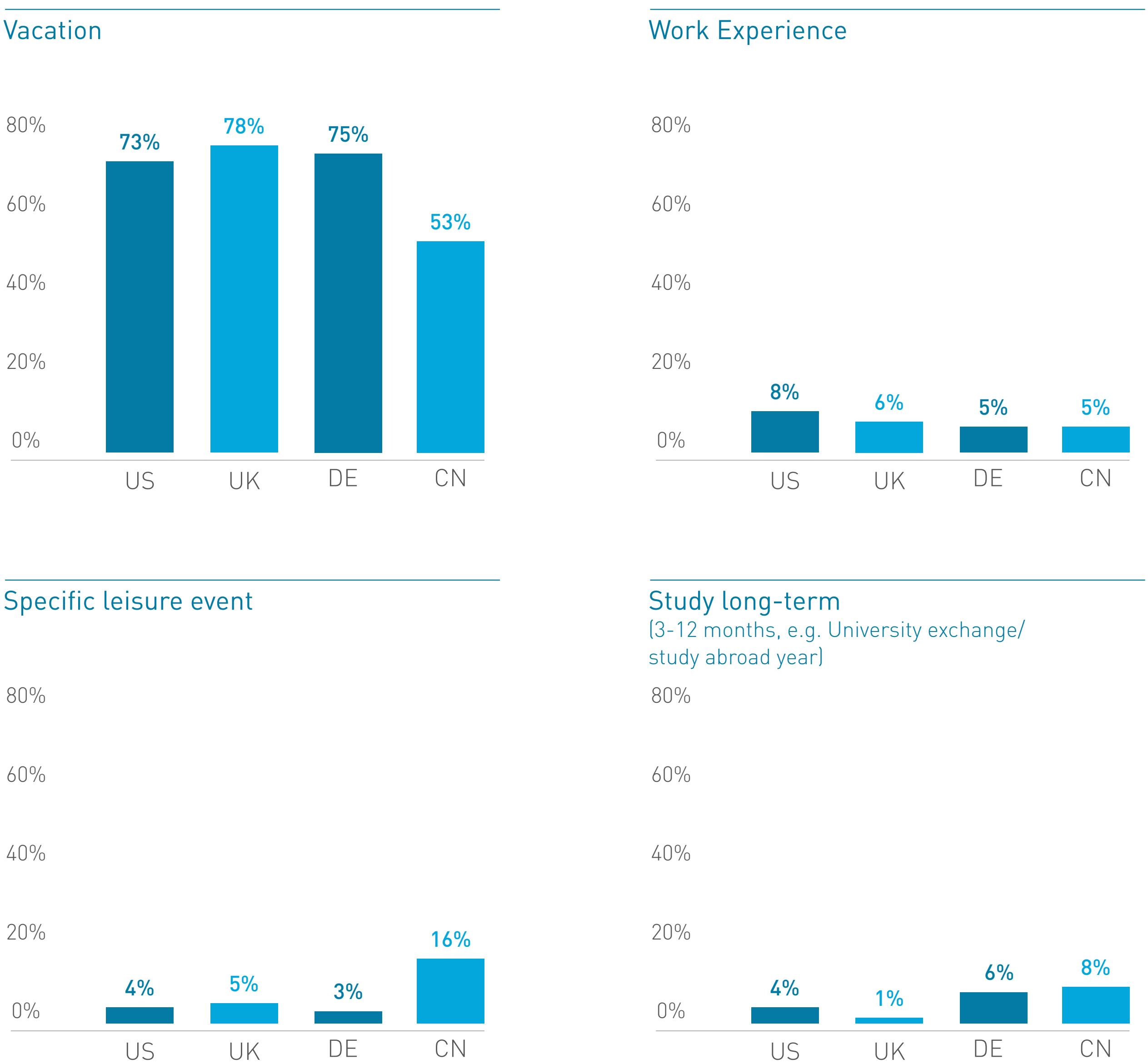
Figure 23: Main purpose for travelling to/within Europe



Source: Ibid Dell Technologies (2018)

All in all, going on a vacation together with visiting a specific leisure event (mainly for the Chinese market), are the major drivers for Gen Zers to visit Europe, collecting more than 70% of the responses for each market. Additional components, such as visiting friends and family, going to a business event, volunteering or doing a short course, were selected by a very small share of the respondents. Despite the presence of initiatives, such as Erasmus+ and the popularity of exchange programmes with European universities, only in Germany (6%) and China (8%) more than 5% of the respondents selected studying abroad as their main reason to visit Europe.

Figure 24: Main purpose for travelling to/within Europe (per market)



Legend: (applies throughout this report)

CN: China **DE: Germany** **UK: United Kingdom** **US: United States**

A breakdown per market demonstrates that while for British, German and American travellers a vacation is by far the most popular motivation with more than 70% of respondents choosing this option, a sizeable share of Chinese Gen Zers (16%) would come to Europe to attend a specific leisure event such as a festival or concert. Interestingly, while seeking work experience is relatively straightforward for young Europeans, according to this study, in fact, more American Gen Zers wish to visit Europe with the idea to gain work experience than their British and German counterparts.

2.2.2 Reasons for visiting Europe

An analysis of the main motivations for choosing a European leisure destination shows that cost and safety dominate the decision-making process. This is perhaps unsurprising, given that Gen Zers are just entering the global workforce and as a result, are likely to still have limited spending capacity for flights, accommodation and local spending on activities. With relatively little travel experience (in view of their age), it is also revealing that safety and security are important to Gen Zers.

Figure 25: Top 3 reasons for choosing a European destination (all markets)

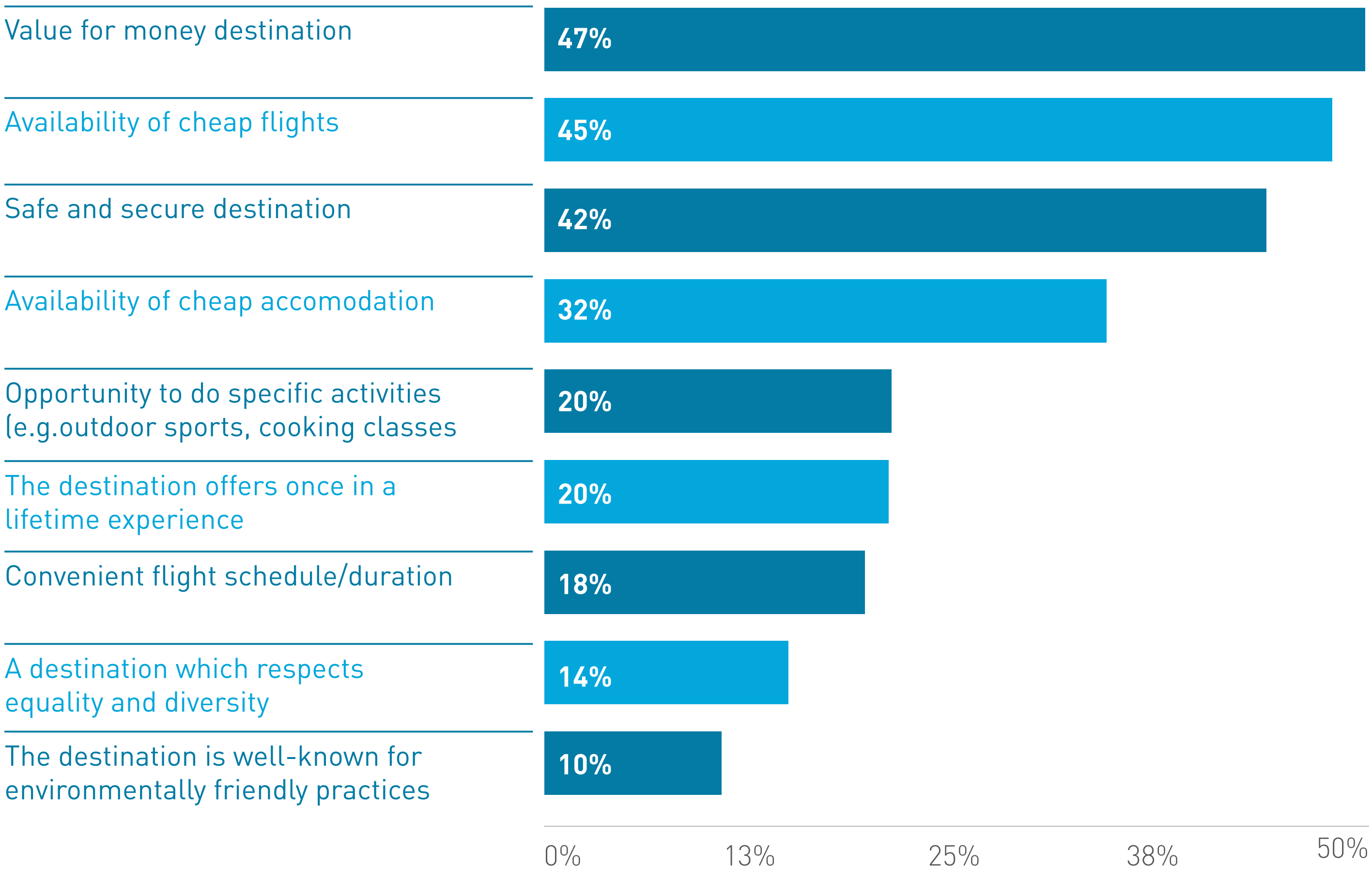
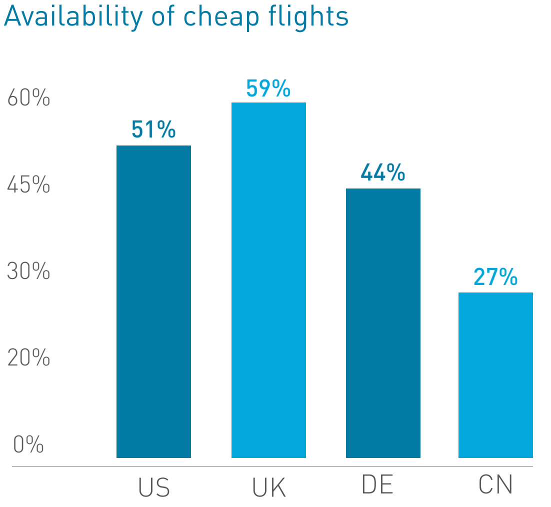
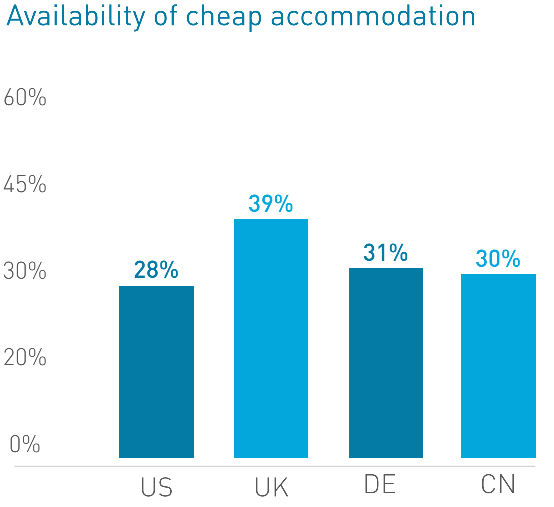
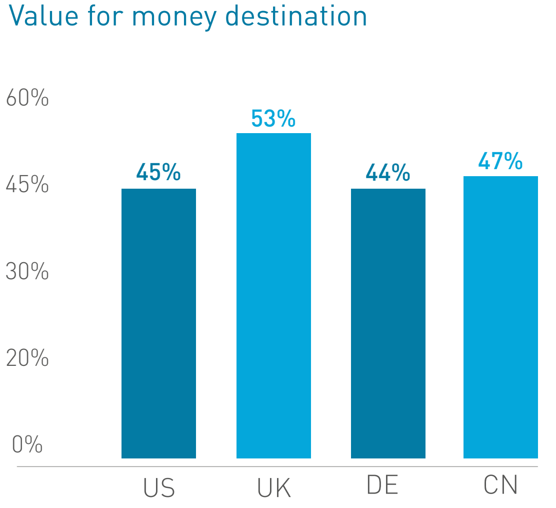
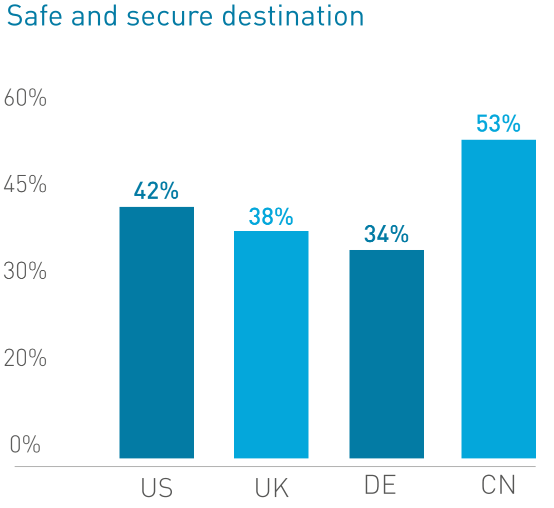


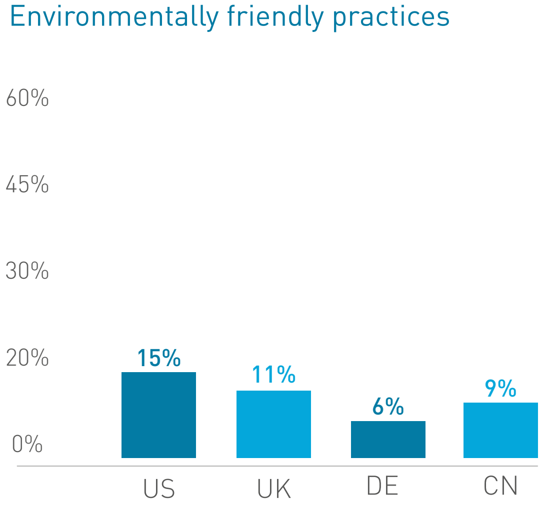
Figure 26: Reasons for choosing a European destination (per market)

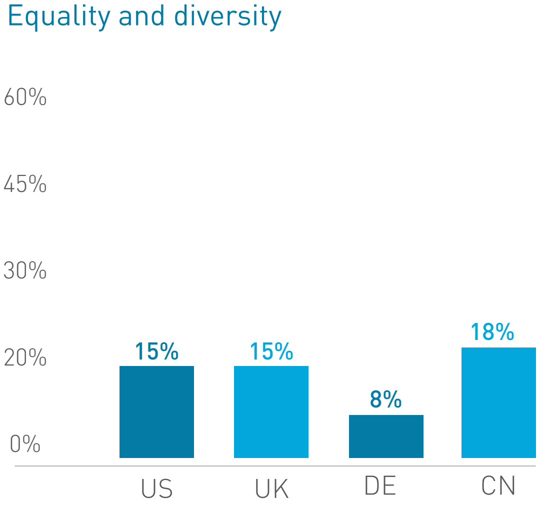










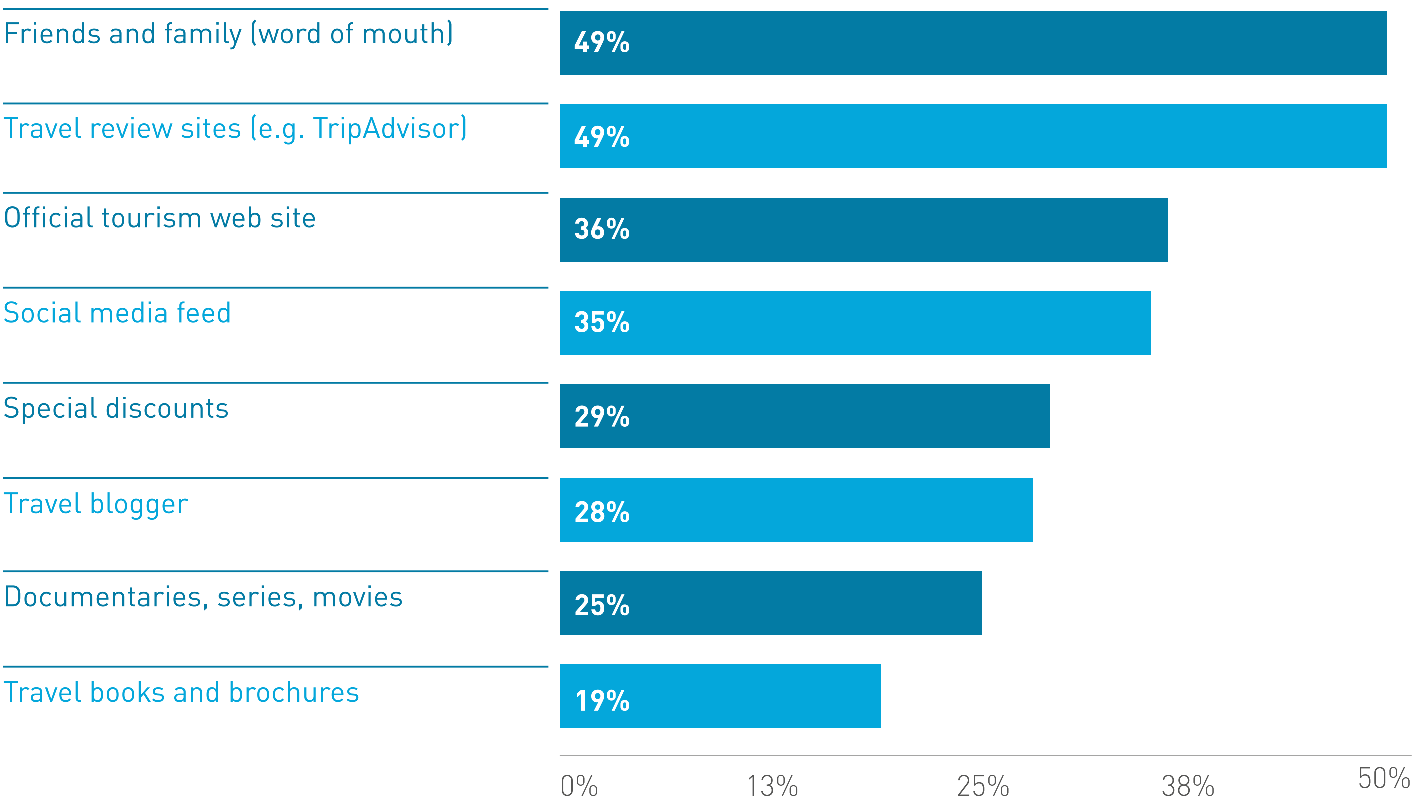


Overall, British Gen Zers are the most enthusiastic about saving money; through cheap flights, accommodation and general spending when in the destination. This may be explained by the UK being one of the first countries in Europe to see widespread use of low-cost airlines (as the birthplace of easyJet) and has a strong culture of online commerce too. Perhaps for similar reasons, American Gen Zers prioritised the low-cost aspect of travel strongly too. One largely unexpected result from this consumer research is that Germans appear to be less driven by environmentally friendly practices or equality and diversity, compared to other markets, when choosing a destination (in contrast to the findings of the desk research and expert interview for Germany). It is also notable that safety and security rates highly for every market, especially for the long-haul markets of the US and China. For Chinese respondents "safety and security" is the top reason when choosing a destination, reconfirming the notions that it is a risk-averse market.

These results suggest that partnering with airlines to highlight special offers could well make a destination more compelling, as well as official guidance and reassurance around safety in the destination, delivered in partnership with major tour operators and other points of customer contact.

2.2.3 Sources of inspiration in trip planning

Figure 27: Sources of inspiration concerning travel ideas



Despite the significant presence of social media in the life of Gen Zers and also NTOs embracing these platforms as their main promotional channel, traditional channels, such as word of mouth are still the most effective way to reach Gen Zers. Travel review sites, such as TripAdvisor and Lonely Planet are also equally as valued, suggesting that authorities need to foster partnerships with such companies and ensure that their assets are well reviewed and presented. It is also striking that more than 1 in 3 Gen Zers also consulted official tourism websites, despite their relative decline in importance as a tool used by NTOs and DMOs in recent years.

Figure 28: Sources of inspiration for travel ideas (per market)

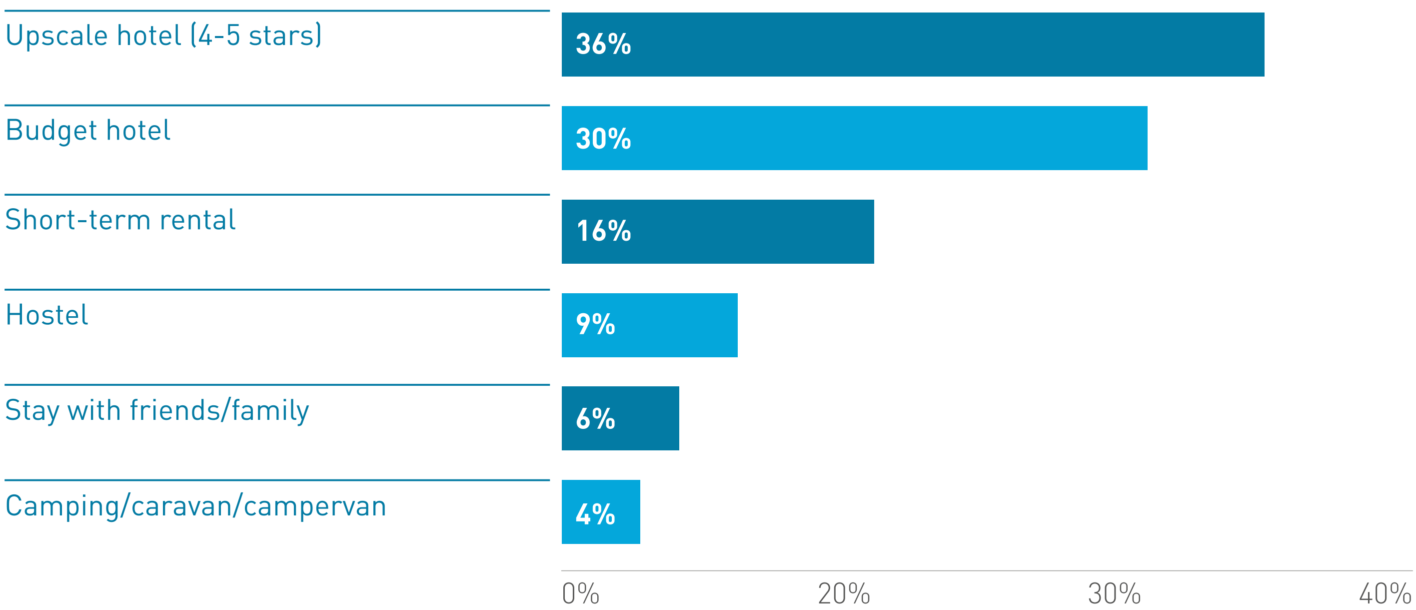
A breakdown by market reveals that the UK and US markets in particular value two sources which tend to offer opinions rather than dry facts; travel review sites and word of mouth from friends and family. It is significant that Chinese respondents appear to rely more heavily on official tourism board websites for travel tips and ideas, closely followed by the influence of documentaries, series and movies, such as Game of Thrones or Harry Potter (not shown above for brevity). Interestingly, despite their heavy use of social networks in general, social media was relatively less important as a source of inspiration, with the advice of friends and family and official sites still valued highly.

The diversity in results shown above underlines that it is important to understand the different preferences of each market and to develop highly targeted campaigns, by using the appropriate channels and relying on the right destination assets. For example, as Chinese Gen Zers are inspired mostly by official tourism websites, this would imply that having a Chinese version of the website and showcasing specifically identified experiences related to popular series and movies, for example, is essential.

The results also reconfirm the notions that NTOs need to embrace partnerships with third parties, such as travel review platforms and develop engaging marketing strategies in social media. Nonetheless, "traditional" word of mouth is still an essential component in attracting visitors, demonstrating the importance of providing Gen Z visitors with an optimal experience while in the destination, to ensure that they will become future ambassadors for the destination.

2.2.4. Accommodation preferences

Figure 29: Accommodation preferences (all markets)

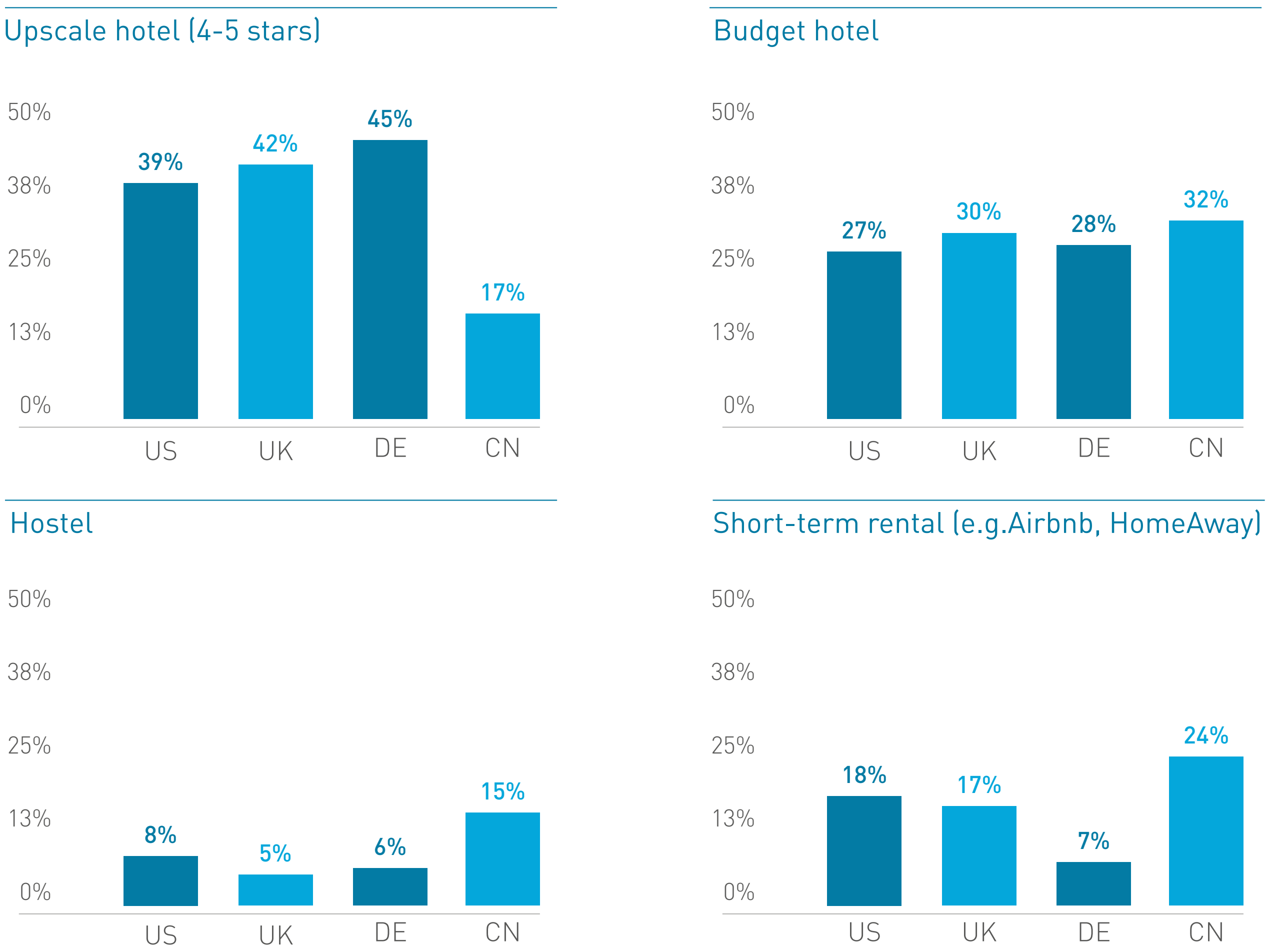


Although Gen Z is a generation that has widely embraced the collaborative economy and initially seems more budget focussed (referring to section 2.2.2), their accommodation preferences reveal a different picture. Upscale (4-5-star) hotels are preferred, however, the breakdown below reveals that this is driven largely by German and British Gen Zers who may choose upscale hotels as a treat, when set against the relatively cheap cost of a flight.

Analysing these results in comparison to those in Figure 3 (in which 45% of Gen Zers have indicated that cheap flights are the biggest driver behind choosing a destination), in comparison to flights, quality accommodation may be perceived as an opportunity for self-reward by Gen Zers. While flights are perceived merely as means to get from A to B and have evolved little in terms of product and service in recent years, the accommodation sector has seen a considerable amount of innovation in terms of design and facilities offered. As such accommodation plays a more integral role in the overall travel experience and thus may be seen as worth the extra expenditure.

Compared to American, German and British Gen Zers, Chinese Gen Zers were the most driven by price, being the most enthusiastic about budget hotels and short-term rentals. This may be due to Chinese travellers preferring to save on accommodation on a multi-country trip (which compared to visiting a single destination could be more costly) while spending more on in-destination leisure activities such as culture, gastronomy or shopping (as seen in Figure 12). Meanwhile, alternative accommodation, such as camping and caravans, or staying with friends/family, were not popular among Gen Zers; none of the markets saw more than 7% of the respondents selecting these accommodation options.

Figure 30: Accommodation preferences (per market)

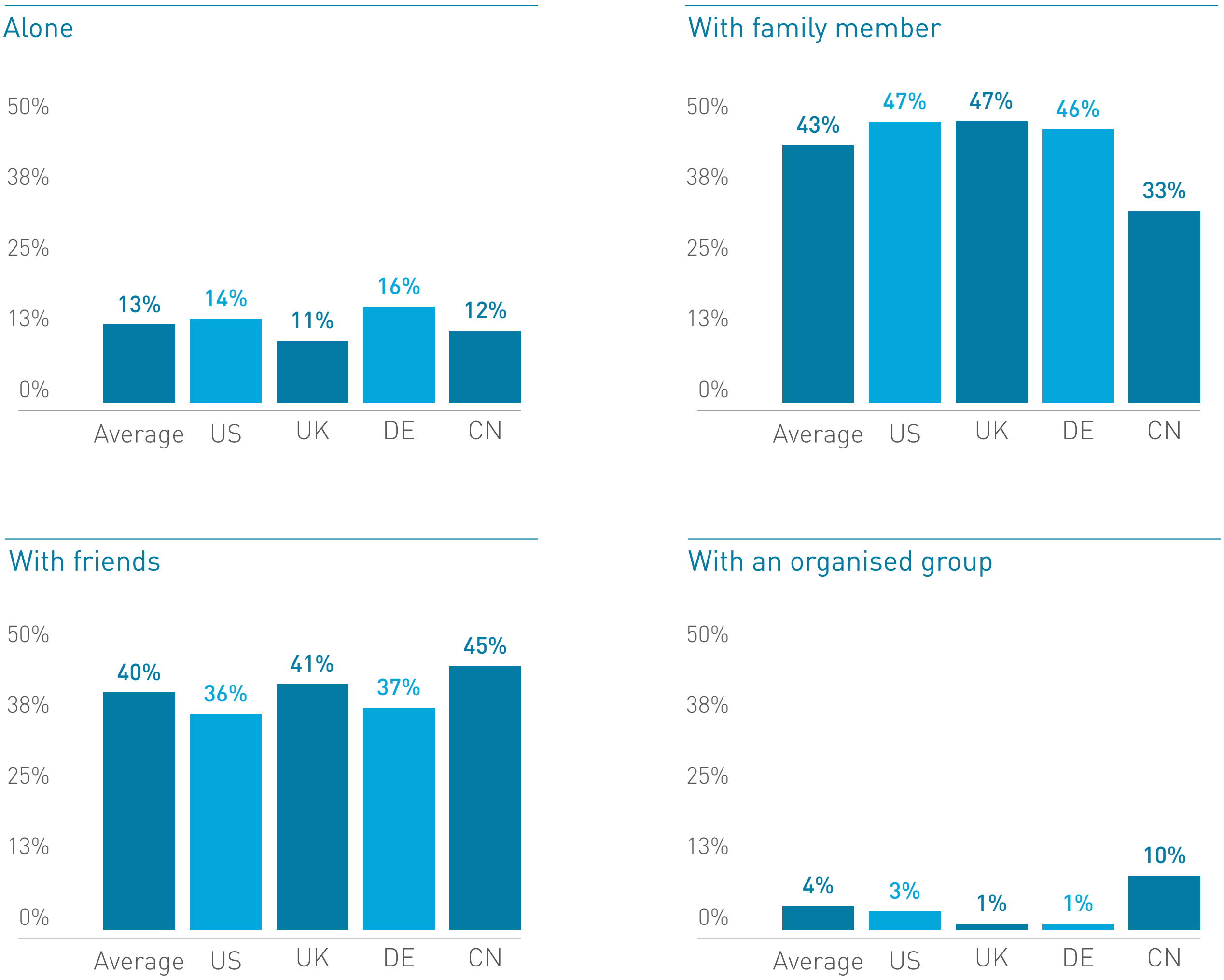


These results suggest that destinations must include a wide variety of accommodation options for Gen Zers, and not fall back on stereotypes relating to budget accommodation. Even though Gen Zers are just entering the labour market, focusing on providing them with budget choices is not enough, as there is a substantial interest in upscale hotels, however partnering with a short-term rental platform could prove effective when approaching the Chinese market.

2.2.5 Travel companions

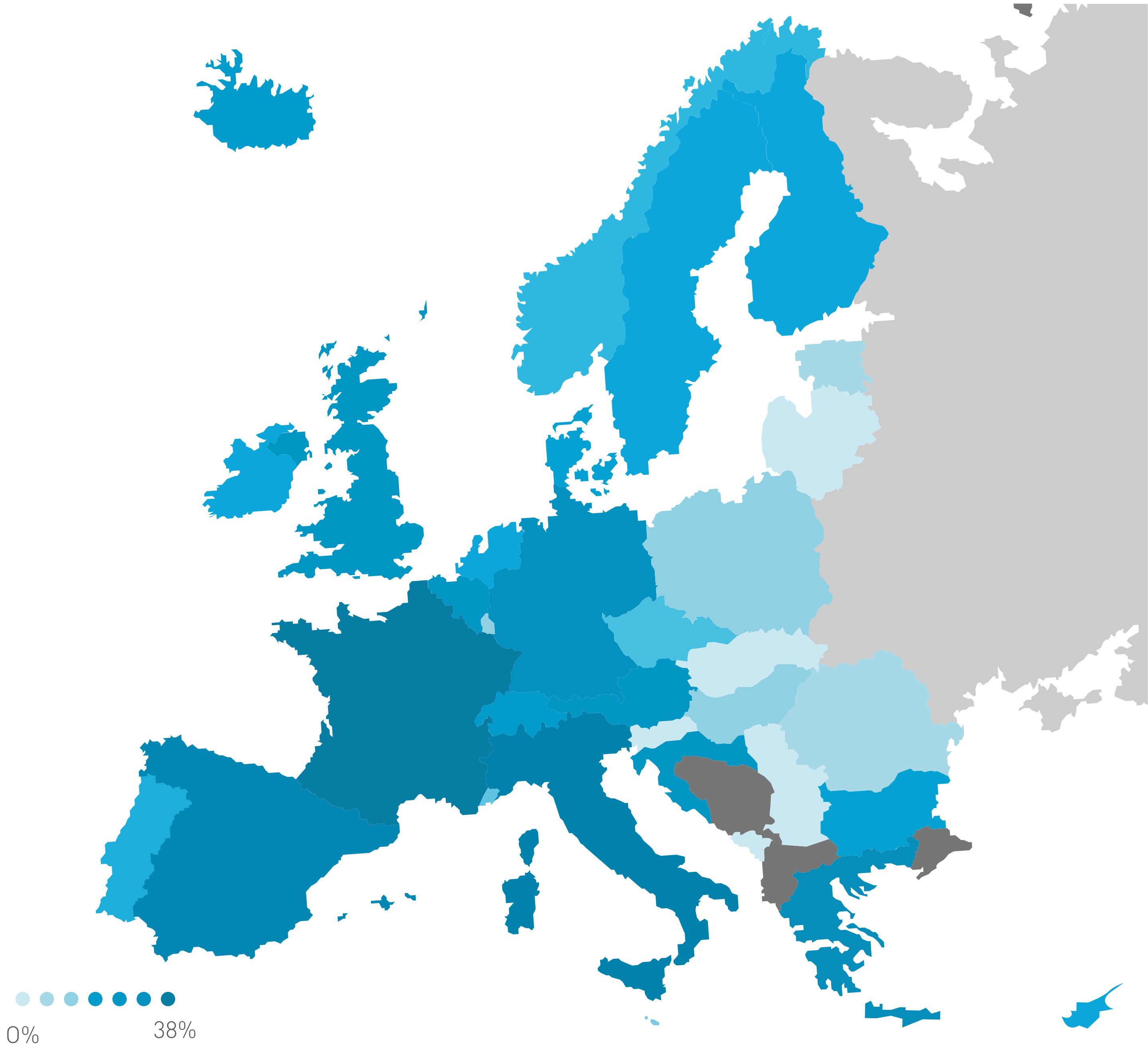
Except for Chinese Gen Zers, the majority of whom would travel with their friends, Gen Zers from the other three markets indicate that they would most probably be accompanied by family members when travelling. This is perhaps unsurprising, given the age of respondents who are still likely to consider travelling with their parents on a family vacation. While China is also the only market where travelling in organised groups is still relatively popular, it is important to note that more than 10% of Chinese Zers are open to travelling alone. This may be explained by the trends observed in the expert interview section, where it is suggested that through travelling Gen Zers escape their social circle and build self-confidence.

Figure 31: Gen Zer's choice of travel companions



2.2.6. European destination wish-list

Figure 32: Most popular European destinations



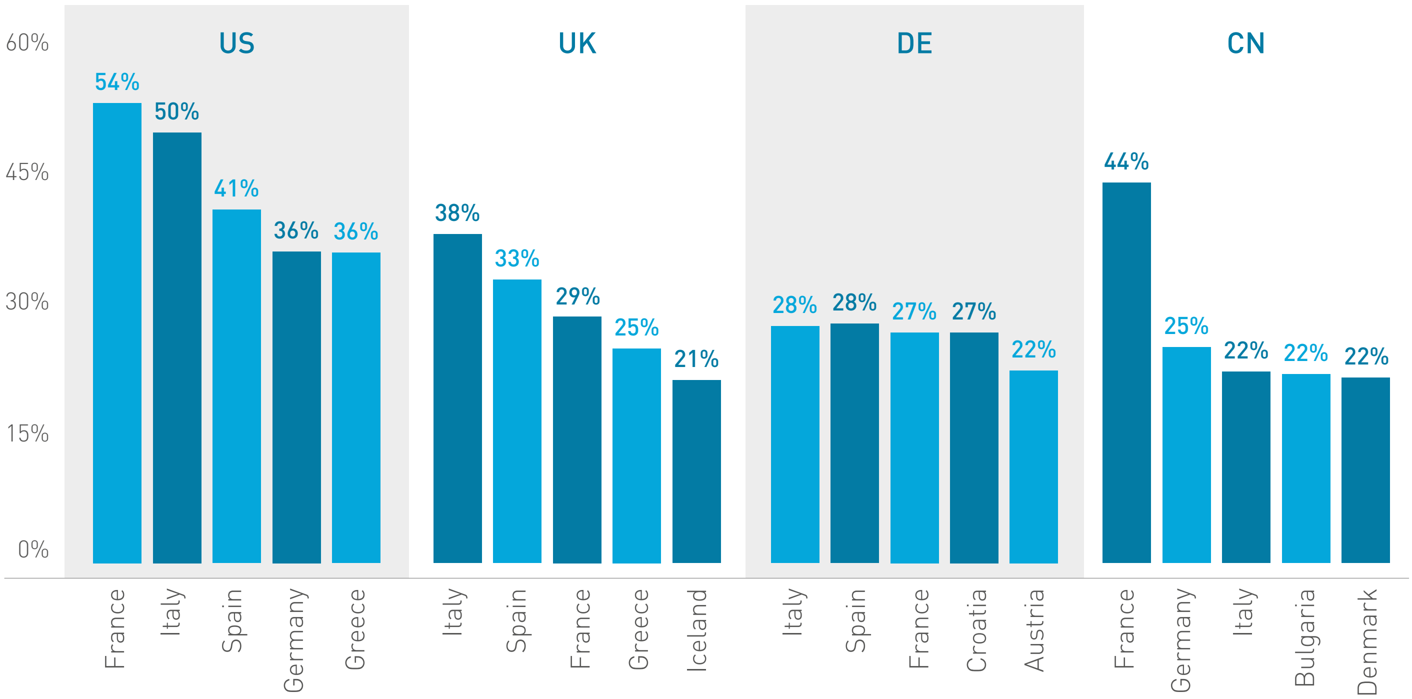
When all markets are considered together, Gen Zers show the strongest preference for visiting Western European countries: France, Italy and Spain (showing approximate alignment with the European countries seeing the highest overall numbers of international arrivals), followed by Germany, Greece and the UK

Looking more closely at both the UK and US markets, there are major similarities between their top five most preferred European destinations, which include France, Italy, Spain, and Greece. German Zers share the same preference for Mediterranean destinations, with the only difference being that Croatia is marginally more popular than Greece (which is the 6th most popular destination). Interestingly, for British Gen Zers, Iceland also figures as a popular destination (NB: flight connections between the UK and Iceland have improved considerably in recent years).

Looking at the Chinese respondents, France is clearly the most popular choice, however, except for Italy, none of the other top countries fits with their German, UK and US counterparts' preference for the "beach and sun" experience typically associated with Mediterranean destinations. For Chinese Gen Zers, Germany, Bulgaria, Denmark and the UK follow the list of the most desired countries to visit. Important to note is that together with Denmark, there is also a substantial interest from Chinese Gen Zers in visiting other Nordic destinations, such as Finland (18%) and Iceland (20%).

A full list of preferences per market can be found in Appendix (2).

Figure 33: Most popular European countries (all markets)

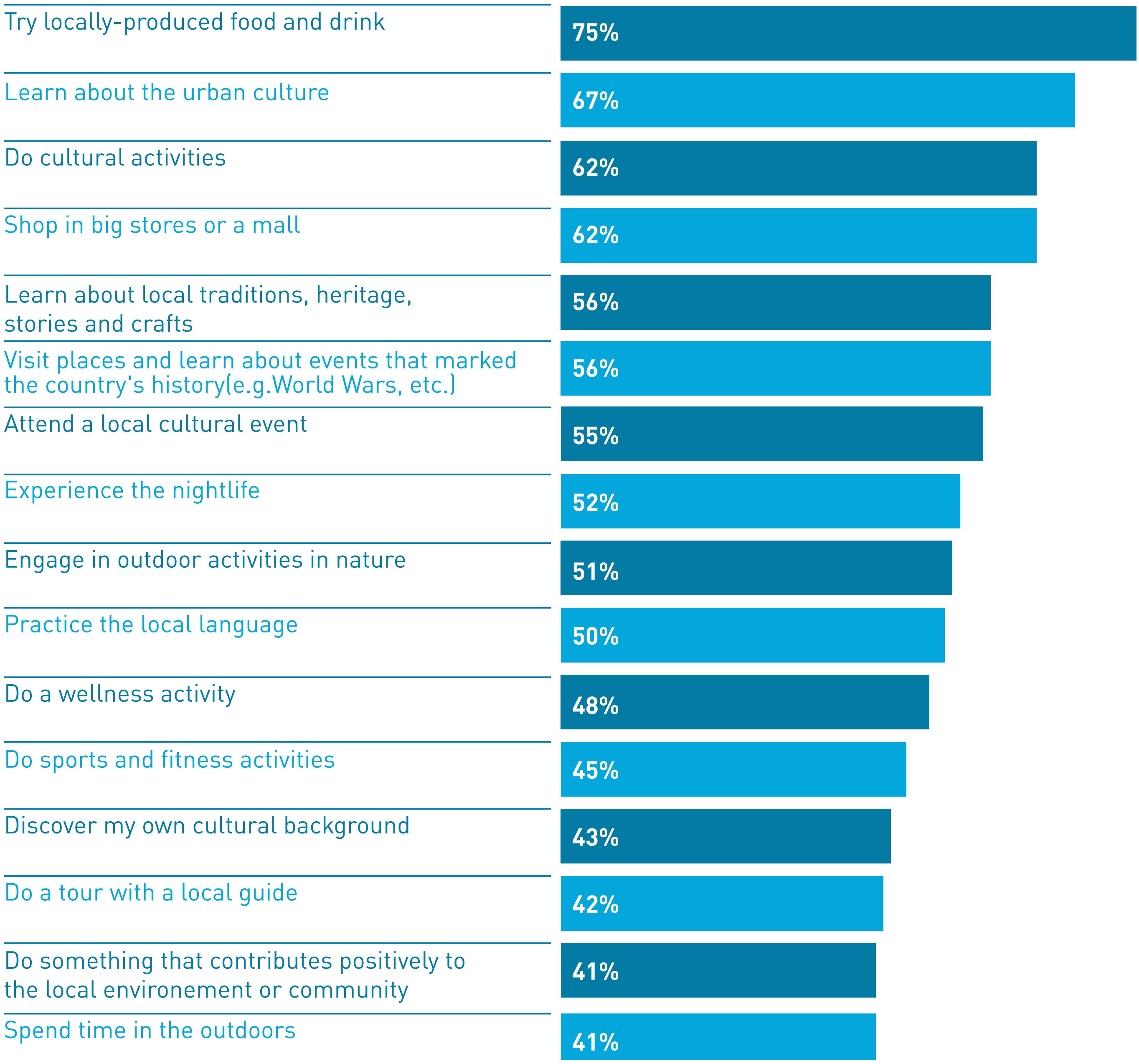


The popularity of Mediterranean destinations is evident among Gen Zers. France, Italy, and Spain are the countries that generate the most interest for all groups (except for Spain in the case of Chinese Gen Zers). These results demonstrate Gen Zers' preference for popular tourism hotspots since they align with the most popular destinations in Europe for international tourism arrivals as recorded by the World Tourism Organization (UNWTO).[85] The proximity of these three destinations and the good air and rail connections between them means that creating packages and transnational products could be a great way to take advantage of their shared popularity for Gen Zers, especially from Germany, the UK and US

Similarly, Scandinavian countries have the opportunity to tap into the interest of Chinese Gen Zers. Destinations, such as Finland that have already designed products and services which are specifically focused on Chinese tourists (such as the Stopover Finland programme with Finnair) are seeing not only an increase in popularity[86] in the broad Chinese market, but as this survey reveals, among Chinese Gen Zers too.

2.2.7 Preferred in-destination activities

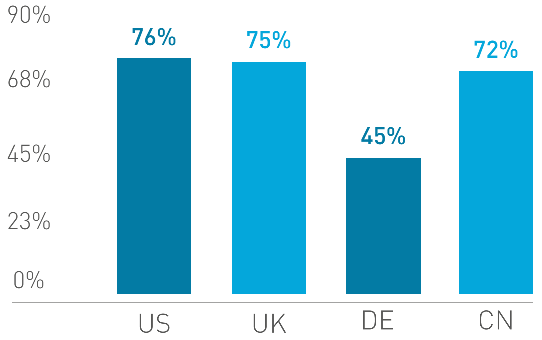
Figure 34: Most popular in-destination activities for Gen Zers



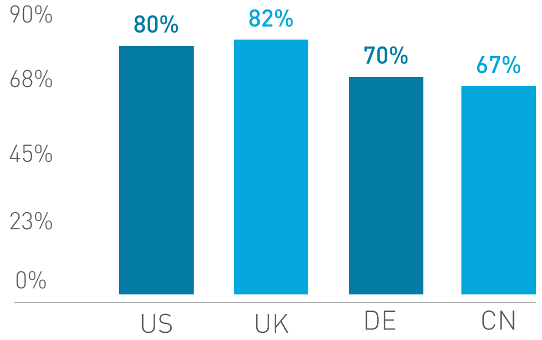
The above results reflect the research presented in Chapter 1, which show that Gen Zers have a strong interest in localism and authenticity. The keen interest in trying locally produced food and drink and learning about local urban culture are two examples of this. Doing cultural activities, such as visiting museums or theatres, also underline the serious and studious nature of Gen Zers observed by the UK and US experts interviewed at the end of this chapter. While sports and fitness activities or 'contributing positively to the local community' are ranked lower by respondents, it is still significant that they were selected by 45% and 41% of respondents, respectively.

Figure 35: Most popular in-destination activities for Gen Zers per market

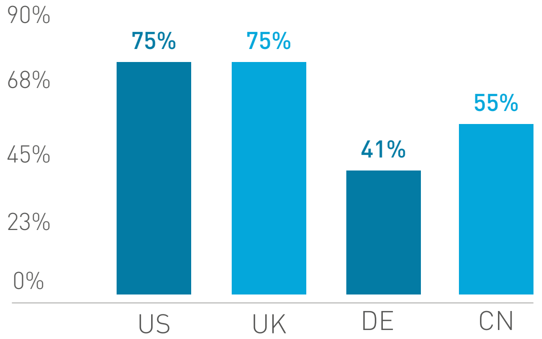
Learn about the urban culture
(food markets, street art, etc.)



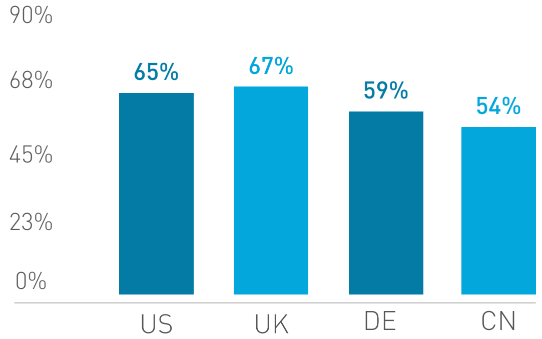
Try locally-produced food and drink



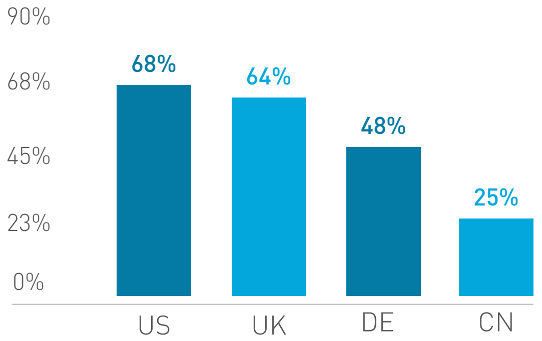
Do cultural activities
(e.g. visit a museum, theatre, etc.)



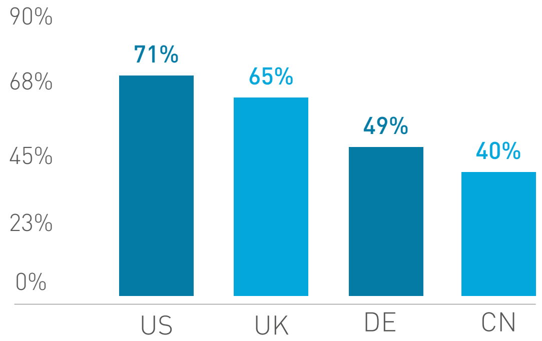
Shops in big stores or a mall



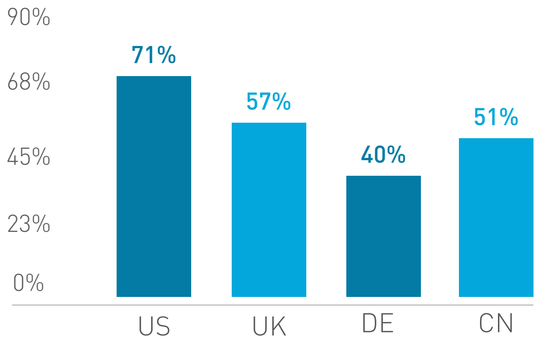
Experience the nightlife



Visit places and learn about events that marked history



Attend a local cultural event



As the desk research demonstrated, Gen Zers have a particular interest in authenticity, and in particular, discovering new types of food and drink. Here, it is notable that 'trying locally produced food and drink', and 'learning about urban culture' were consistently the most popular activities across all markets. This may be due to the fact that Gen Z is the most diverse generation in terms of ethnicity and beliefs, and it is a generation which embraces different cultures and is curious about the distinctive elements of a destination (also discussed in Chapter 1). Urban culture, the lifestyle of the locals, their cuisine and habits, together with local heritage and culture are aspects that strongly define places and can help travellers to quickly understand a destination. Therefore, it is unsurprising that Gen Zers have a strong interest in activities which align with their passions.

Chinese, US, and British Gen Zers also indicate that visiting a museum or attending local cultural events are one of their top in-destination activities. For German Gen Zers, the picture is more mixed, with far more enthusiasm about trying locally produced food and drink, and notably less enthusiasm than the other markets for cultural activities, such as visiting a museum or theatre. It is notable that with regard to nightlife, Chinese Gen Zers do not really relate to their counterparts and less than 30% state that they will visit clubs or bars when travelling. China is also the market that shows the least interest in visiting places that marked history, however, this could be explained with the fact that historically and culturally they can't really relate to major events which have occurred on the continent. All in all, except for gastronomy, shopping is the other aspect that is universally embraced by Gen Zers.

How do these results relate to ETC's Tourism Passion Communities?

Relating these results to the most relevant tourism **passion communities** for Europe; **'gastronomy lovers', 'city life enthusiasts', 'immersive explorers', 'explorers of cultural identity & roots'** - it would be difficult to highlight a specific group where Gen Zers fit perfectly. When combined with the findings of the desk research, these results appear to reflect the tastes of 'immersive explorers', evidenced for example, by their fascination with local gastronomy and local urban culture and local traditions. This combined with an interest in shopping and nightlife also suggests they belong to the passion community of 'city life enthusiasts'.

Overall, though city life experiences are universally popular and seem to be Gen Zers' preferred in-destination activities, there are also some nuances of interest around culture and heritage, suggesting a feint identity with the community of cultural identity explorers. All markets have shown a strong interest in cultural activities, such as visiting heritage sites, cultural shows and museums, meaning that cultural tourism is an essential component of curating a destination for Gen Z.

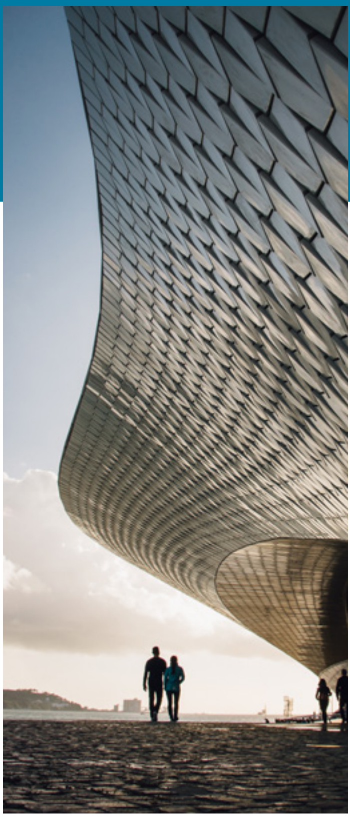
Guide to the ETC Passion Communities:

Gastronomy lovers share interests linked with food, wine and other beverages while travelling.

City life enthusiasts are travellers inspired by urban experiences. Activities undertaken by this group are less immersive and happen over shorter timespans.

Immersive explorers seek a slower pace of events, reflecting a mindset geared towards learning about a specific interest (or destination) in depth.

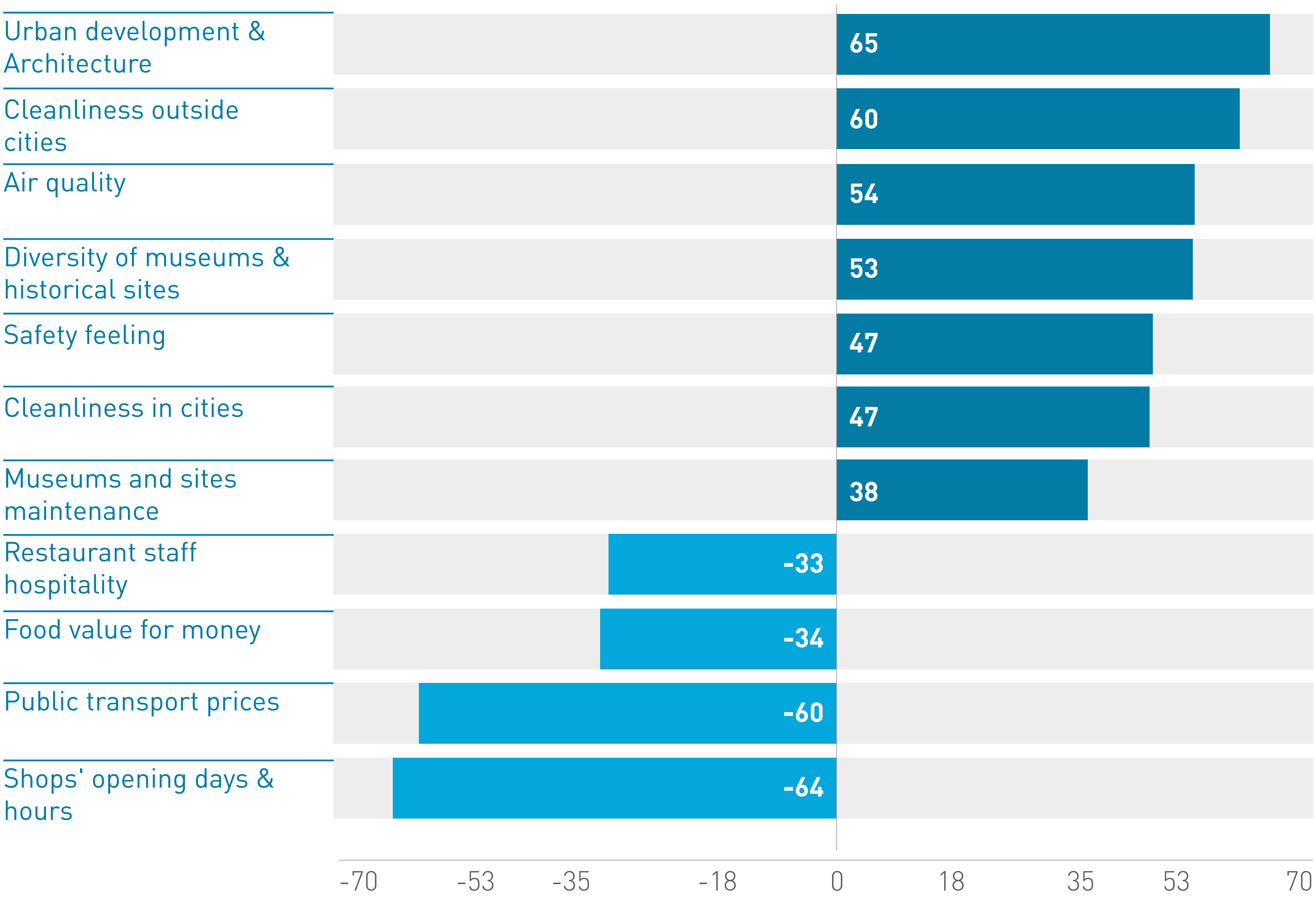
Explorers of cultural identity and roots include history and culture enthusiasts with a particular interest in significant events that marked the world's and/ or their personal history.



2.3. POST-TRIP APPRAISAL OF EUROPEAN TRAVEL

NB: The data in section 2.3 was contributed separately to the study by TCI Research, using a slightly different methodology to that of the main study. While it was also focused on young people aged 18-24 in the Chinese, German, British and American outbound travel markets, the selection criteria were based on Gen Zers who had already visited Europe, and asked them about their satisfaction with various elements of their visit. They were asked to score their visit using the TravelSat Index, where scores from extremely satisfied or dissatisfied visitors tend to influence the overall picture more than the arithmetic averages

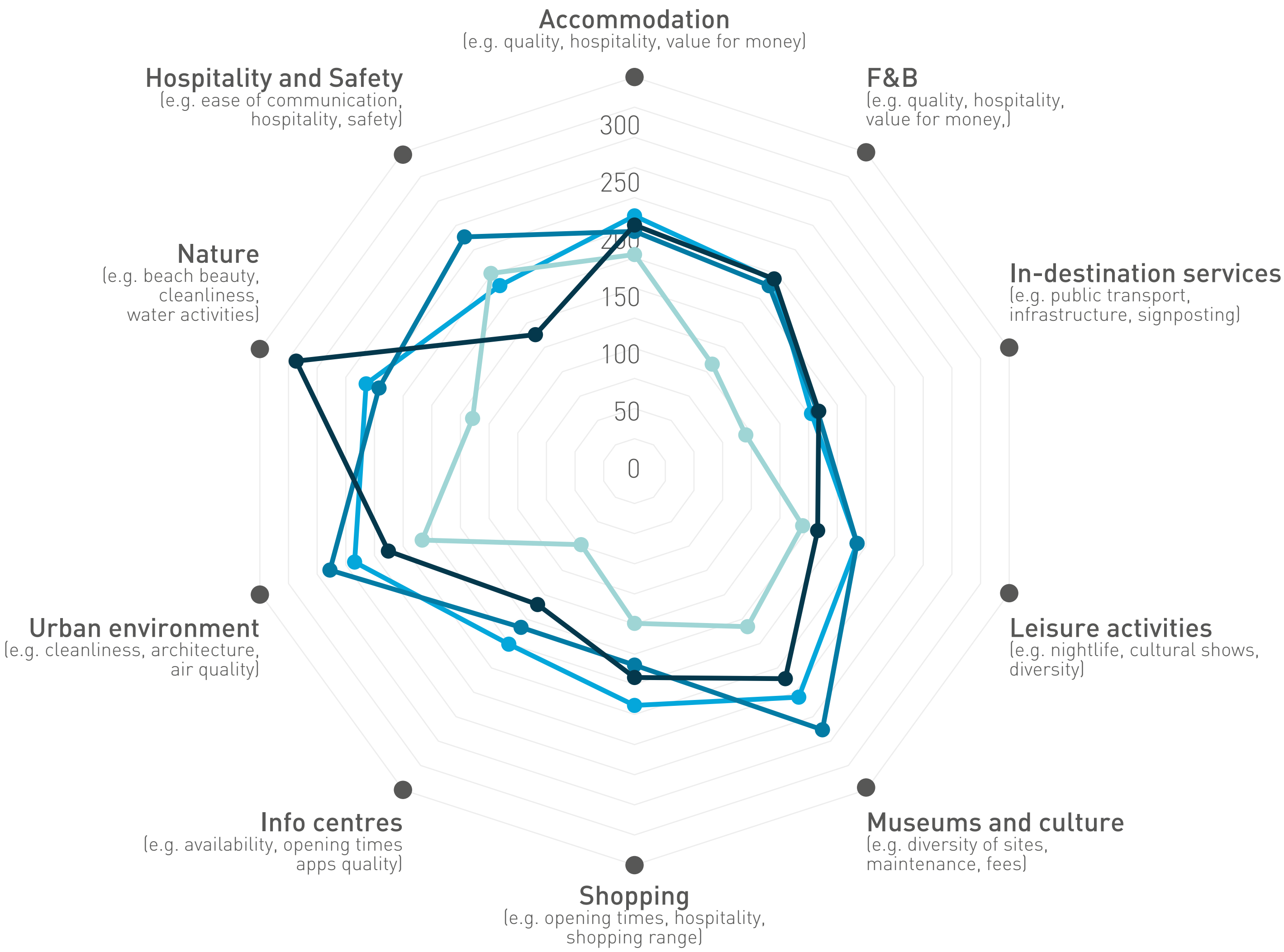
Figure 36: Competitiveness of Europe against other regions (source: TCI Research)



A comparison of the sentiments of Gen Z towards Europe and competing world regions (North America, Asia-Pacific, Latin America/Caribbean and Middle East and Africa), shows that impressions of Europe were broadly positive. The physical condition of destinations - particularly cleanliness – is highly rated, together with air quality and the feeling of safety. Two of Europe's biggest competitive strengths - its urban centres, and rich heritage, are also seen as a competitive strength by Gen Zers in view of the fact that that they score architecture, maintenance and the diversity of museum collections highly. These trends align well with the desk research that shows Gen Zers' fascination with cultures that are different from their own, as well as evidence in the primary research underlining their interest for discovering urban centres and the cultural experiences that they have to offer.

In terms of negative experiences, Gen Zers expressed most dissatisfaction around shop opening times, and the prices of public transport and eating out. However, issues around price and value for money generate the greatest levels of dissatisfaction among Gen Zers overall. The friendliness and hospitality of staff in the service sector (e.g. in restaurants, shops, airports, etc.) suggests another area for improvement.

Figure 37: Satisfaction with various aspects of travelling in Europe (source: TCI Research)



Respondent Score: 0-300 points

All markets tend to view Europe's competitive strengths in a similar way, with Chinese respondents giving broadly positive ratings overall, while German respondents seem the least satisfied. The air quality and cleanliness of the urban environment are seen as a competitive strength for all markets, with German Gen Zers paying particular attention to this area. British Gen Zer's also see the beauty and cleanliness of natural spaces (beaches, parks, rural areas) as one of Europe's clear strengths too.

Perhaps confirming Gen Zers' ambivalence to traditional information channels such as visitor information centres, these were given weak scores. It is also notable that other aspects of the trip that involve some element of personal customer service (such as accommodation, and food & drink) were also given weak scores by Gen Zers in all markets. The resources presented in Chapter 1 demonstrate that Gen Zers are particularly demanding when it comes to personalised service and the need to feel 'understood' by the companies they buy from. This underlines the importance for tourism businesses in Europe to ensure a more responsive, attentive level of service to towards their younger clientele.

2.4. TECHNOLOGY USE AND BOOKING PREFERENCES

2.4.1 Preferred booking channels

Figure 38: Preferred booking channels for Gen Zers

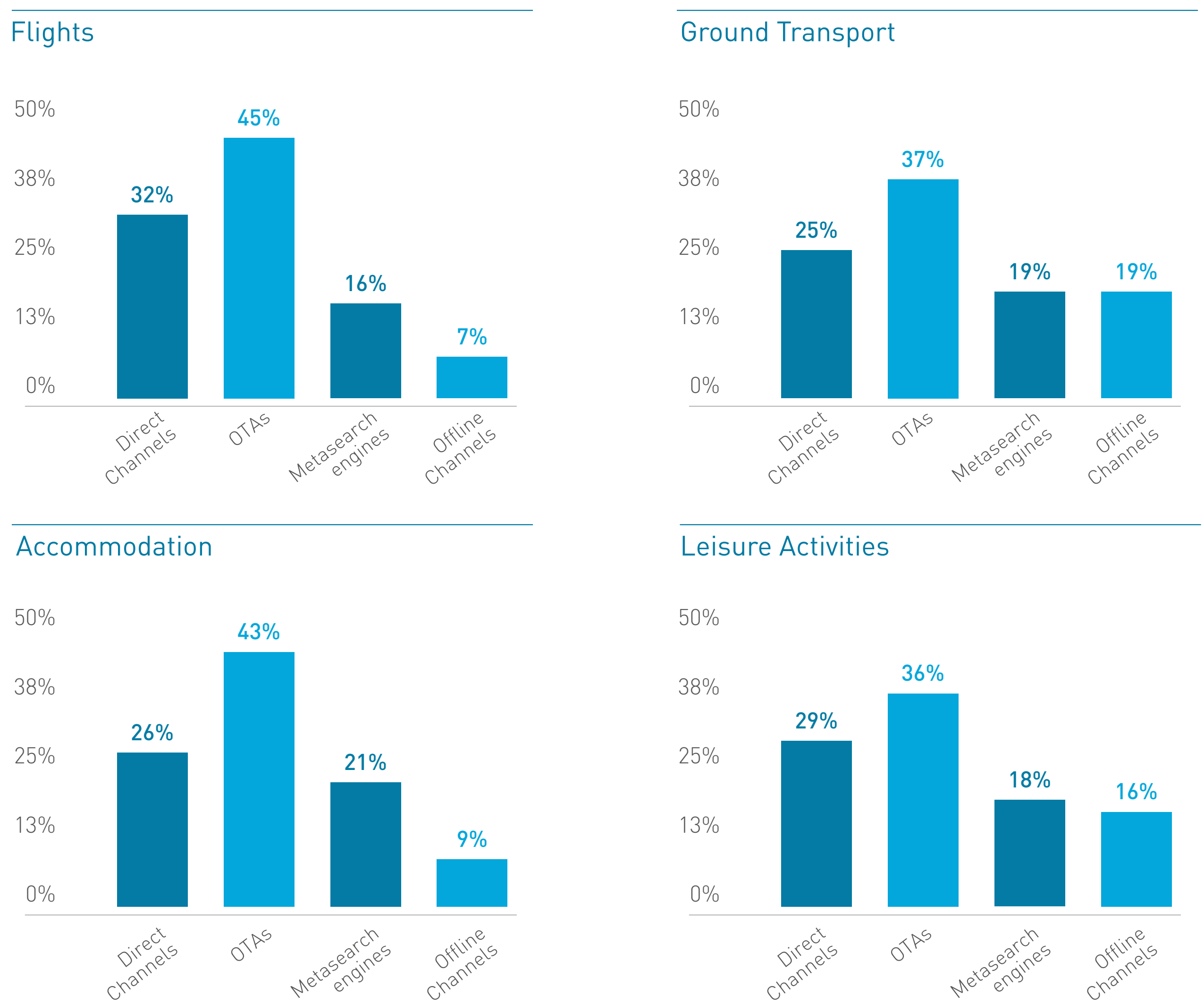
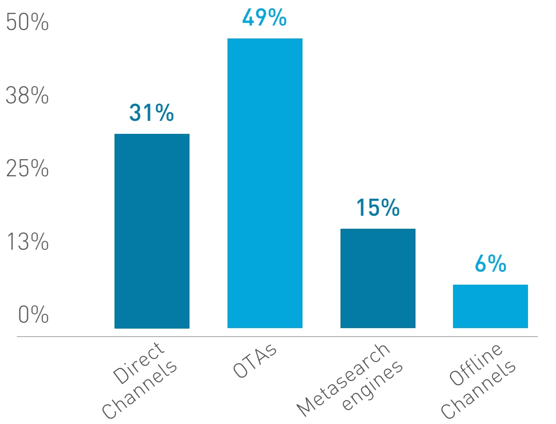
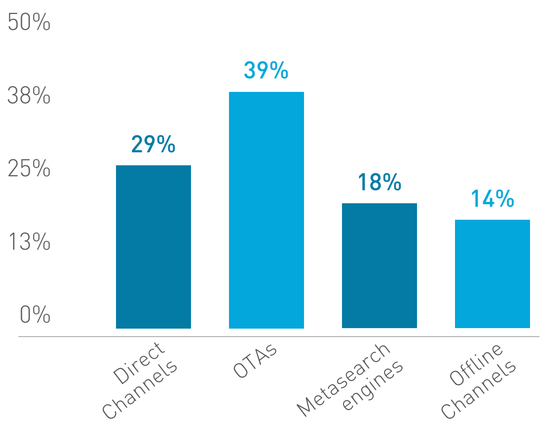


Figure 39: Preferred booking channels (US market)

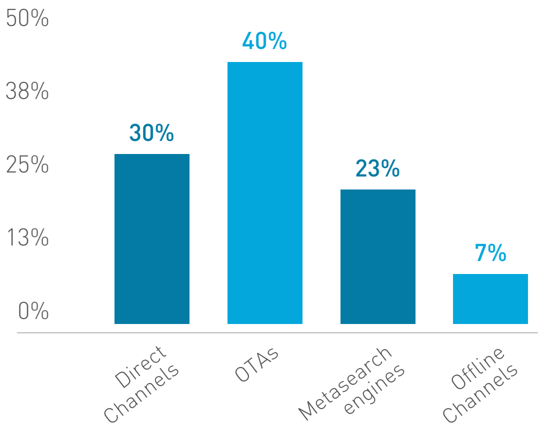
Flights



Ground Transport



Accommodation



Leisure Activities

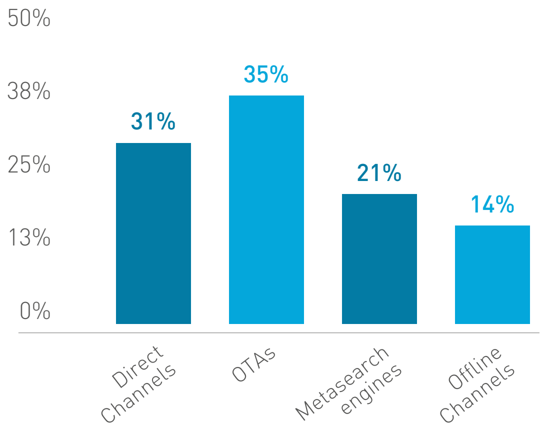


Figure 40: Preferred booking channels (UK market)

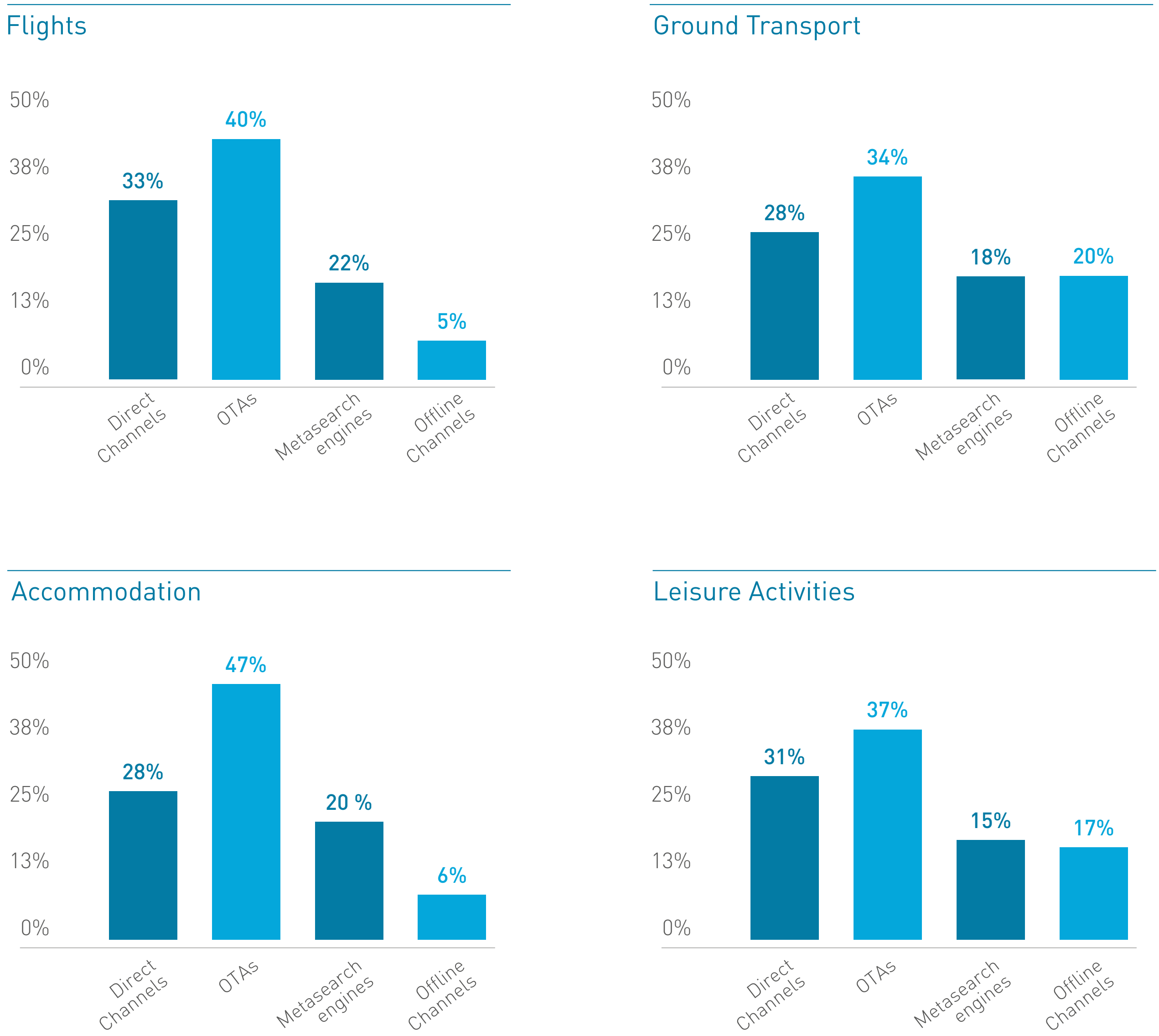


Figure 41: Preferred booking channels (German market)

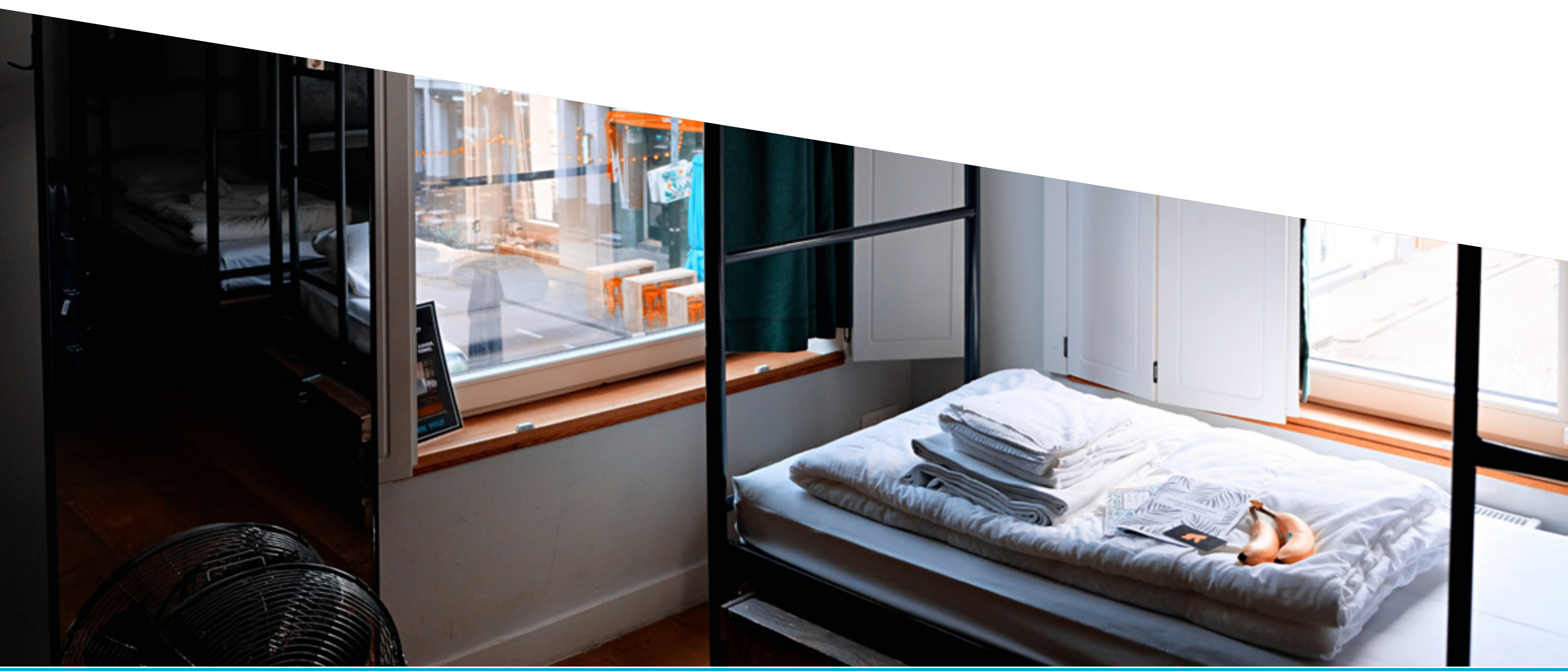
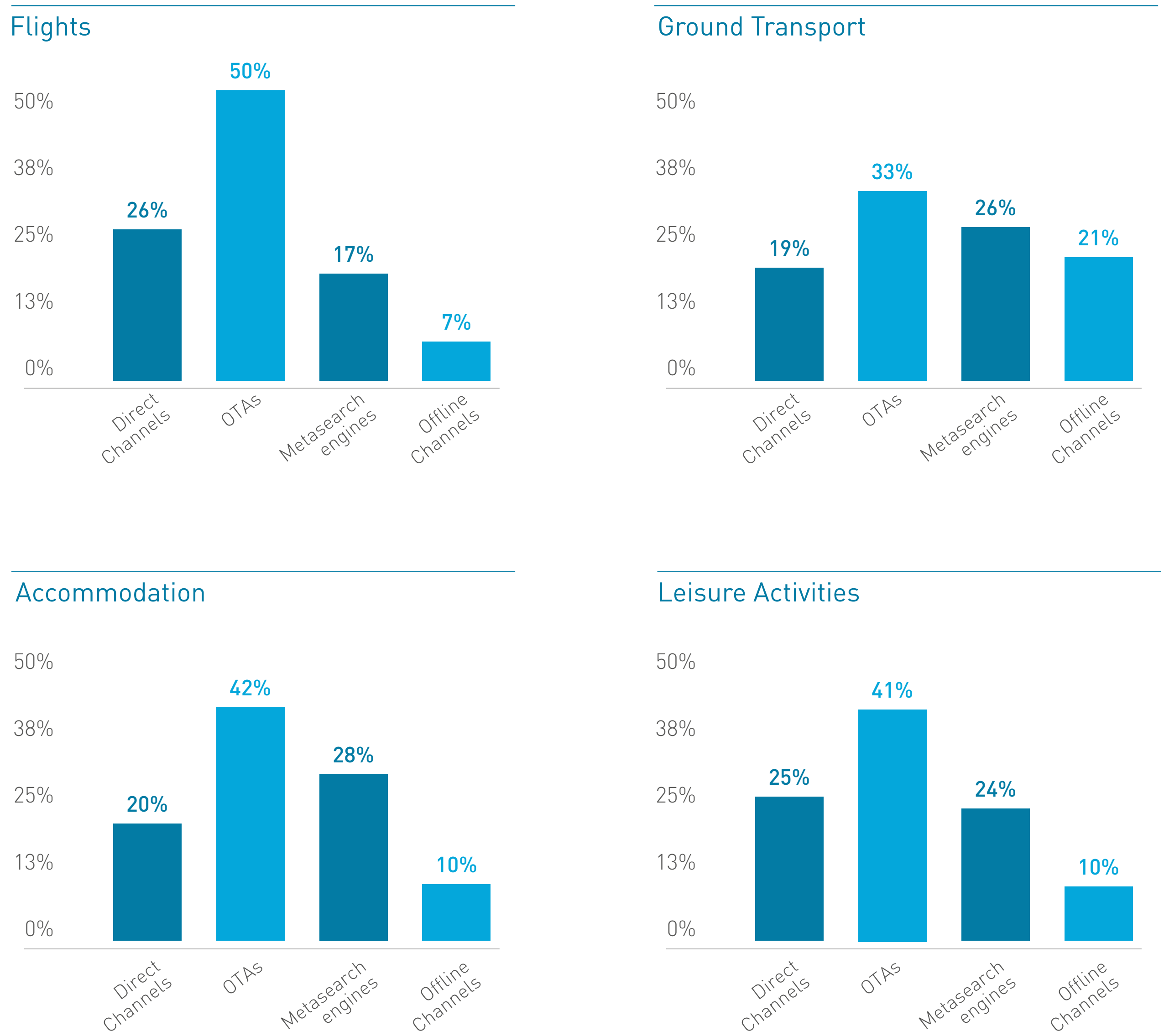


Figure 42: Preferred booking channels (Chinese market)



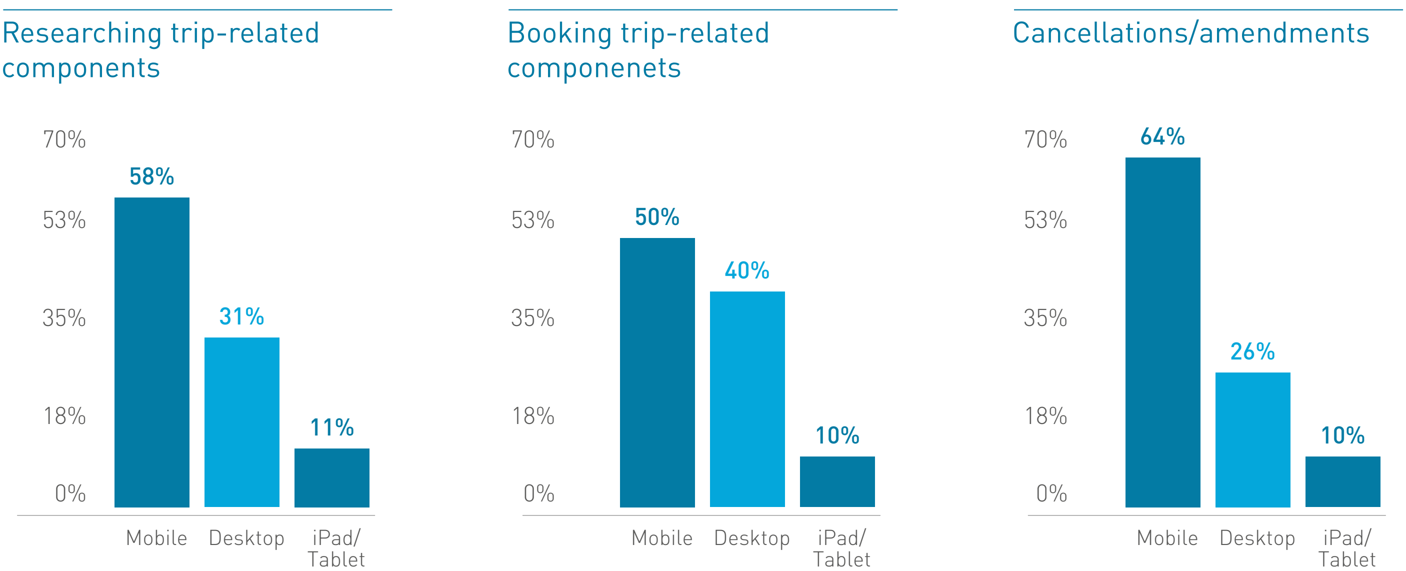
An analysis of Gen Zers' booking patterns shows a clear preference for using online travel agents (OTAs). In the case of British and German respondents, the difference between direct and indirect bookings for flights is not significant however - this could be explained by the popularity of low-cost airlines in Europe that sell a high share of flights directly.[87] For example, airlines like Ryanair generate 90% of their bookings directly, as opposed to via third parties. Yet, in markets like China, where more than 70% of flight bookings[88] and 70% of online travel consumption[89] are generated through OTAs, the dominance of travel agencies such as Ctrip, the Alibaba owned Fliggy, and Qunar,[90] is noticeable. For both flights and accommodation, it can be concluded that traditional offline bookings are largely unpopular, except for a little over 10% of German respondents who stated that they still visit traditional ticket offices or travel agencies.

Meanwhile, the use of the various channels is more evenly spread when it comes to booking elements such as ground transport and leisure activities. This is particularly noticeable with regards to ground transport, where offline bookings (defined in this survey as a ticket office or travel agency) represent a significant share compared to other booking methods for all markets; 14% for the US, 20% for the UK, 21% for Germany and 21% for China. This could be explained by the slower development of online distribution channels for European trains or bus services. For example, major OTAs, such as Booking or Expedia have not yet introduced rail reservations, while the range of transport operators can make online booking difficult or sometimes unnecessary for short trips. Furthermore, it must be noted that many ground transport services still offer a high share of sales through ticket offices or ticket machines.

These results demonstrate that OTAs are the preferred booking channel for Gen Zers and as the next section shows, mobile commerce is dominating the travel sector. As a result of these trends in behaviour, European NTOs would be advised to encourage tourism businesses to introduce mobile-friendly apps and engage in partnerships with different booking platforms. Airlines and accommodation providers have already embraced OTAs as a distribution channel, however, a significant percentage of leisure activities and ground transport is still sold through offline channels. Nevertheless, meeting the demands of a mobile-first generation will require a substantial effort in creating seamless experiences that allow all aspects of the journey to be planned and booked online, where possible via smartphone.

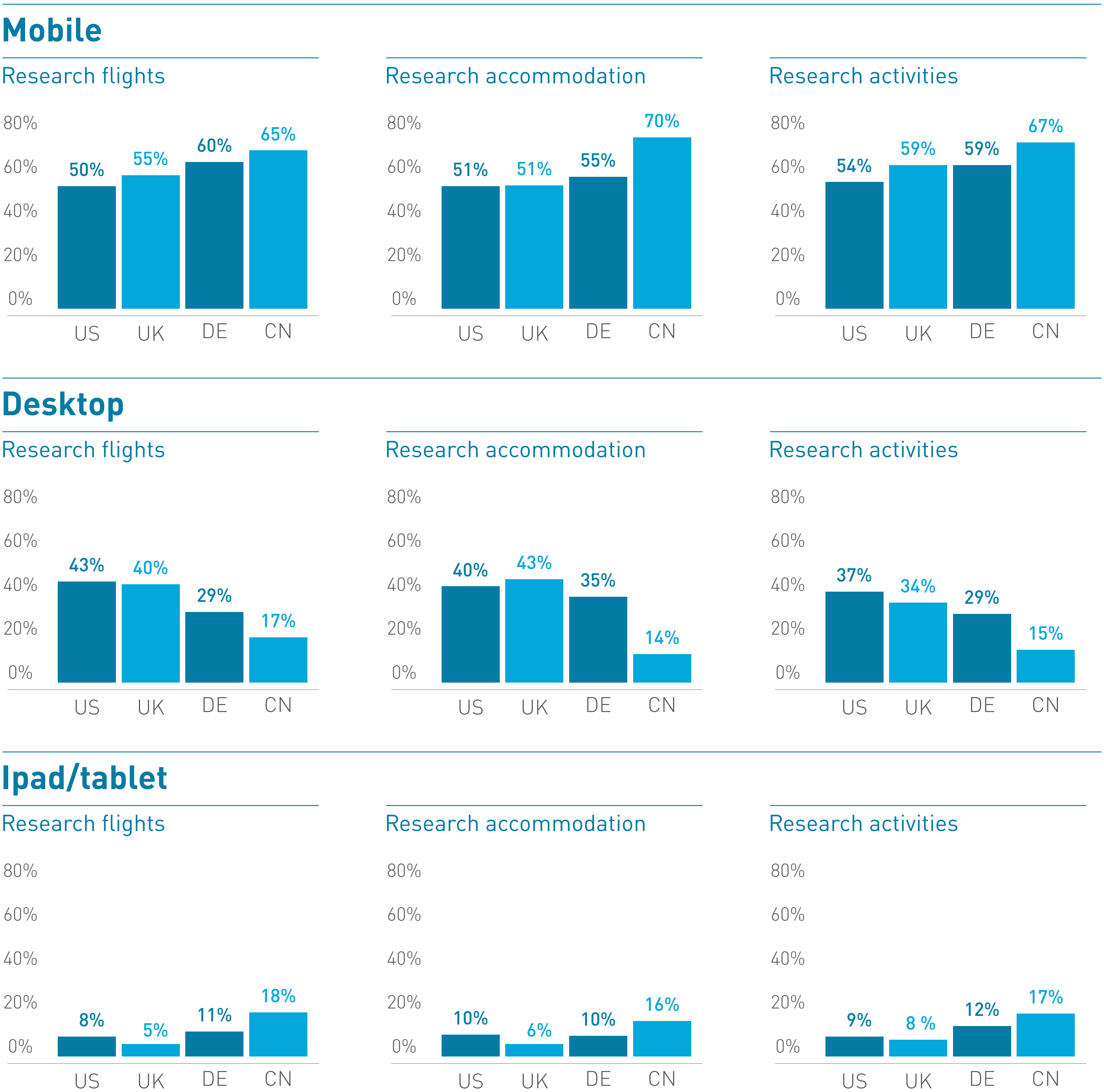
2.4.2 Preferred device for trip research and bookings

Figure 43: Preferred device when researching, booking or making changes/cancellations to a booking



In line with the findings of Chapter 1, the smartphone is the most important device for Generation Z when researching, booking or cancelling trips. At the same time, it is notable that desktop (P.C./laptop) bookings are still relatively popular for German, British and American Gen Zers, perhaps because a larger screen allows for easier comparison of dates and prices and navigability. Compared to this, the Chinese market has long been understood as a straight-to-mobile market (with existing travel agents predominantly offering their services in mobile format too).

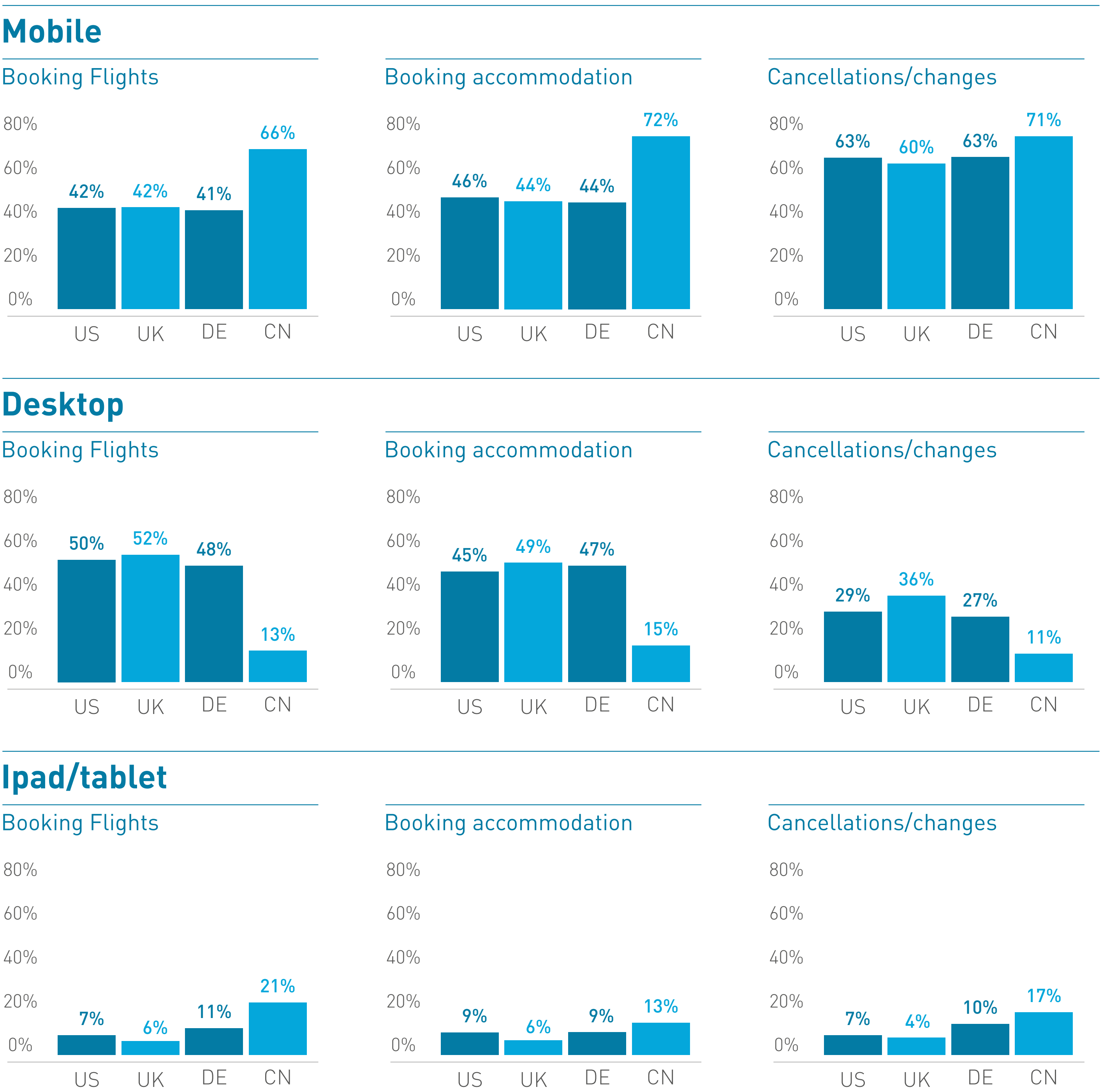
Figure 44: Preferred device when researching trip aspects (per market)



Chinese Gen Zers show a particularly strong preference for using smartphones for trip planning and logistics, and little appetite for using desktop computers or iPads for this, or other aspects of researching and booking a trip. For the research phase of their trip, British and German Gen Zers mainly use their mobile devices, however, it is notable that they still prefer to use a personal computer or desktop when making the actual accommodation or flight booking. Using a mobile phone for changes or cancellations to a booking is universally popular. (NB: this may also have been interpreted by respondents as using the mobile for a call rather than surfing online).

Overall, this demonstrates the importance for accommodation and attractions of having mobile-friendly websites and apps as their channel for marketing and engaging with their Gen Z customers when on site too.

Figure 45: Preferred device for bookings and cancellations (per market)



2.4.3. Social media use while travelling

Figure 46: Social media behaviour when travelling

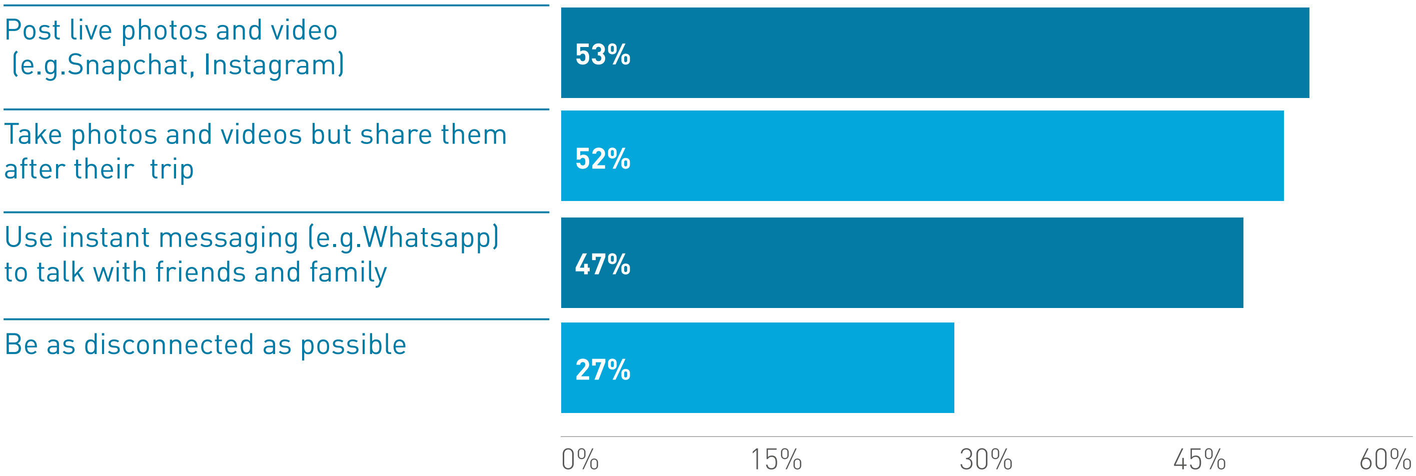
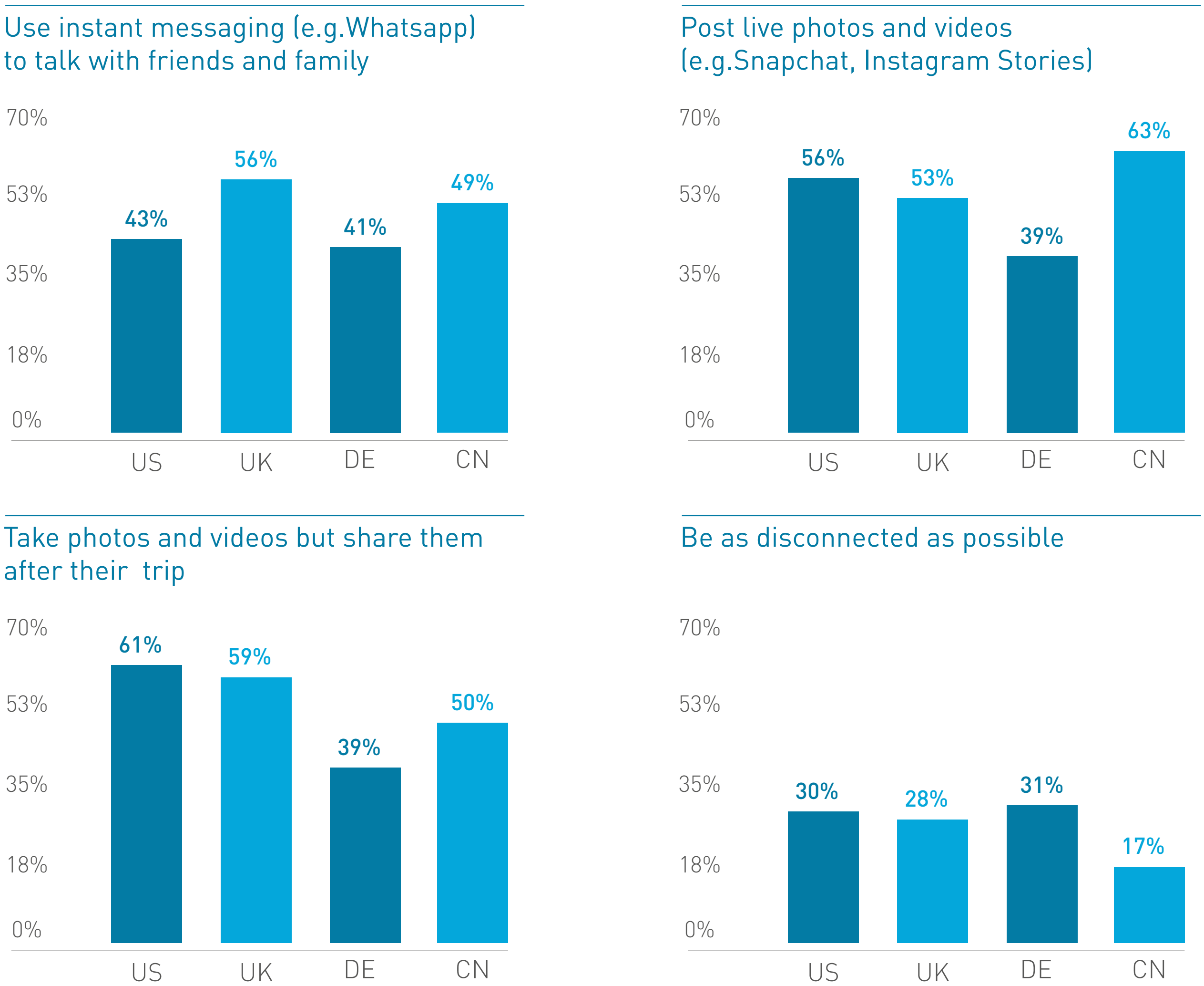


Figure 47: Social media behaviour when travelling (per market)



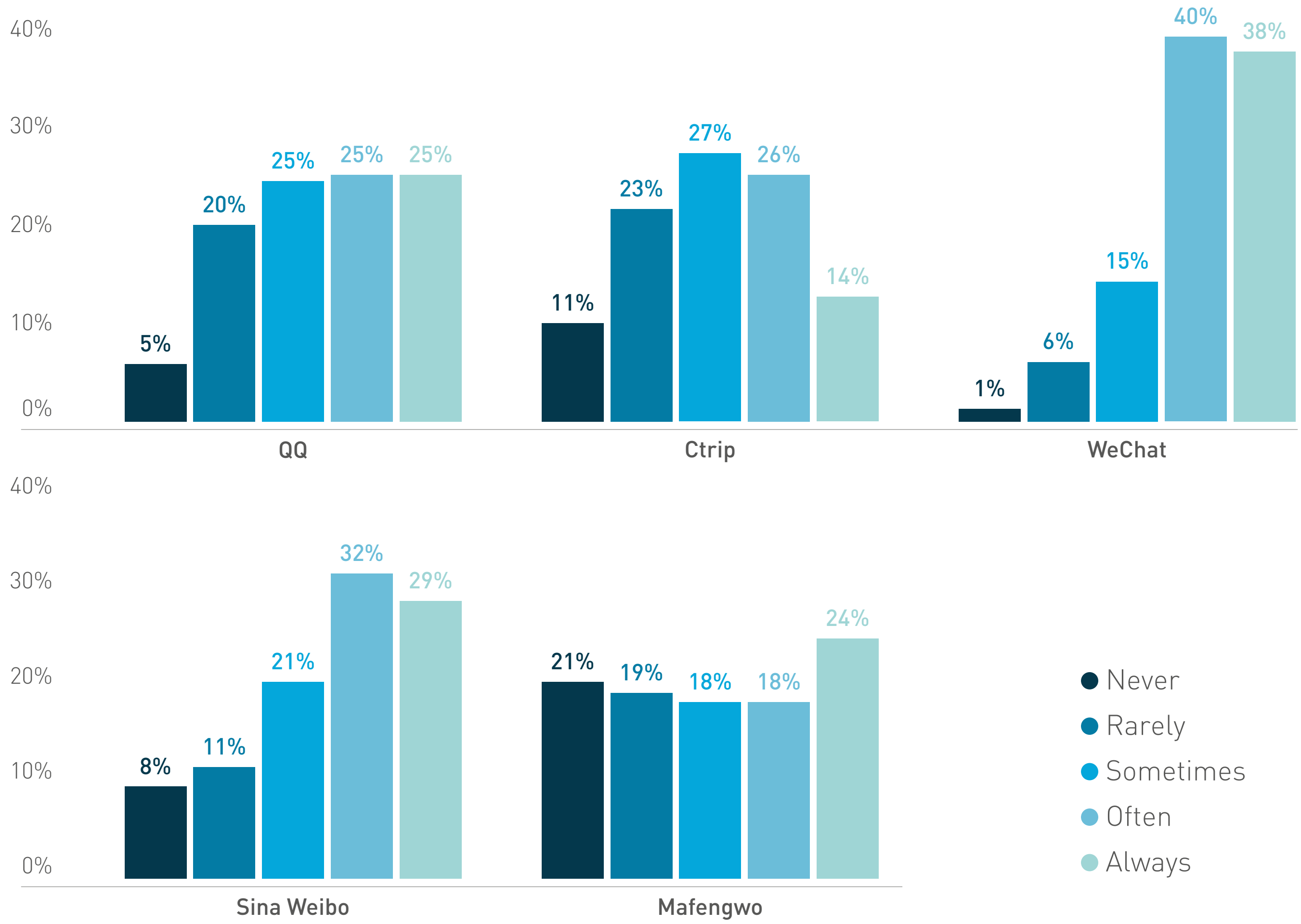
Staying in contact online and sharing experiences in real-time plays a substantial part in Gen Zers' travel habits. More than 40% of the respondents in each market, stated that they regularly engage in instant messaging or posting live photos and videos. Interestingly, while Chinese Gen Zers prefer to share photos or videos in real-time, their counterparts from the US and the UK, are more inclined to share their experiences after the trip; this is possibly due to the fact that networks, such as Instagram (highly popular for the UK and US markets) require slightly more time for photo curation and editing).

While some travellers have reacted to accelerating digitalisation by seeking occasional disconnection while travelling,[91] this trend does not appear to apply to Gen Zers from China, the UK and the US (at least not according to this research). German Gen Zers showed slightly more willingness to disconnect while travelling (31%), while Chinese Gen Zers were the least likely to seek disconnection (17%). It was noted already in Chapter 1, that Gen Z is a generation for which the mobile phone is the most important device, and this can be seen in their travel-habits. Related to the previous recommendation that NTOs and private business should foster the creation of mobile-friendly platforms, these findings suggest that it is equally important that NTOs curate experiences for Gen Zers that are easily sharable and "Instagrammable".

2.4.4 Preferred apps while travelling

Respondents were asked about their preferred apps to use while travelling. Since apps used in China vary considerably from the other three markets, Chinese respondents were able to choose from a modified list of apps, while respondents from the other three markets chose from a standard list more relevant to Europe and the US

Figure 48: Most used apps by Chinese Gen Zers when travelling

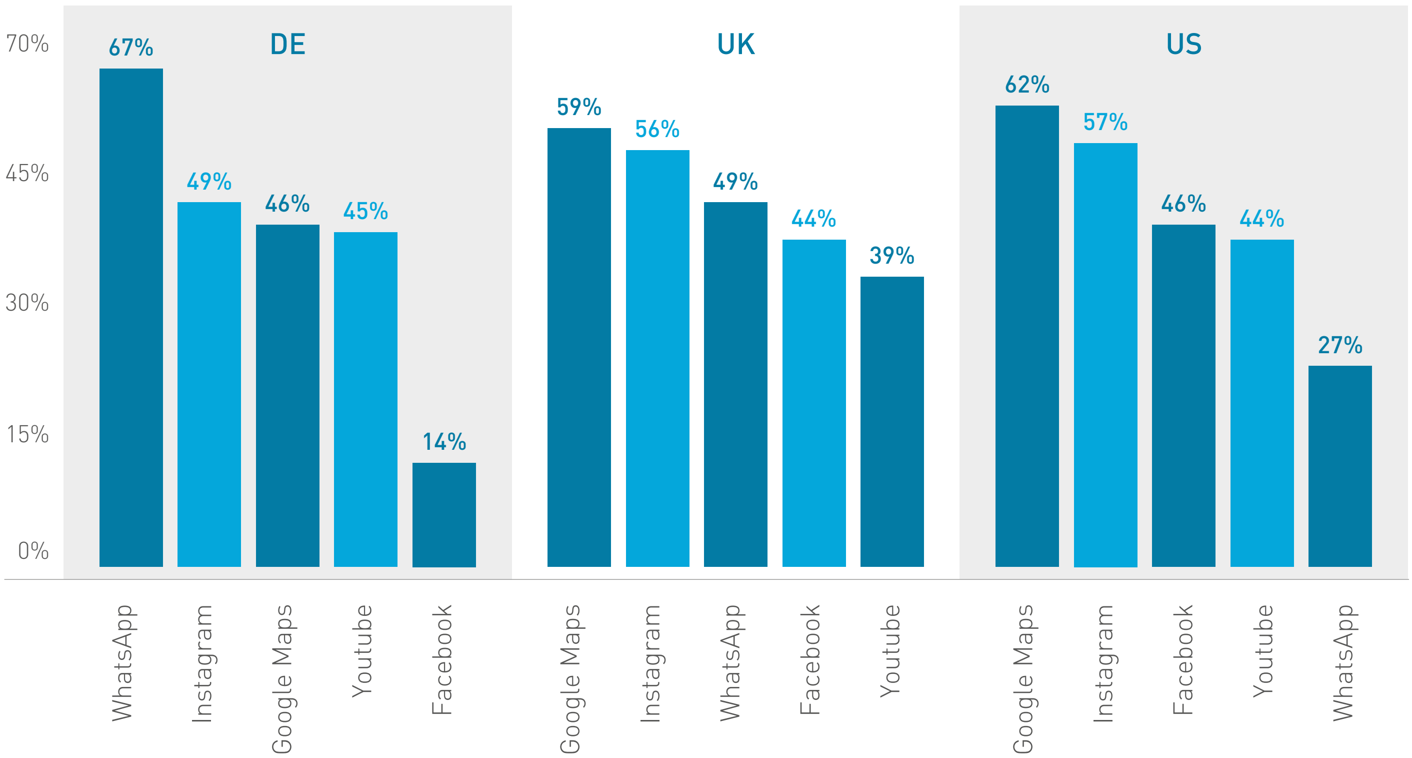


Brief guide to apps featured in this graph, and their approximate equivalent in Europe/North America

1. **Q.Q.**
   Mainly used as instant messaging app (equivalent to WhatsApp)
2. **Ctrip**
   Biggest OTA in China (equivalent to Booking.com or Expedia)
3. **WeChat** Multi-purpose messaging, social media and mobile payment app (equivalent to Facebook)
4. **Sina Weibo**
   Microblogging social media platform (equivalent to Twitter or Redditt)
5. **Mafengwo**
   Platform for sharing travel-related experiences (equivalent to TripAdvisor)

For Chinese Gen Zers, the top applications used while travelling were WeChat, Sina Weibo and Q.Q. Mafengwo and Ctrip. As the most popular travel-related platforms in China, they also play an important part in the Chinese travellers' experience. This is confirmed by the results above; that WeChat (a general messaging service used in daily life, also used as a payment app) is used heavily for communication and updating friends and family while Mafengwo is generally only used to see and create long-form blog-type content related to travel. Both demonstrate that Chinese Gen Zers are keen to share their travel experiences with family and friends while on the road. With the exception of Ctrip, which is the most popular OTA in the country, these apps mainly act as social media and messaging platforms. This underlines the importance of creating content and experiences that are easy to tag and share. It is also important to underline that WeChat is a multi-purpose app acting as a messaging platform, social media and payment app. Given its overwhelming popularity, it is essential for tourism businesses to be able to trade with Chinese youngsters by using all these functionalities.

Figure 49: Most used apps by American, British and German Gen Zers



Meanwhile, Gen Zers from the US, UK, Germany appear to have different patterns of behaviour in app use while travelling. WhatsApp is one of the most widely used applications among Germans and Brits, however, its popularity in the US is quite low. On the other hand, only 13% of German Gen Zers state that they often use Facebook while travelling, while for American and British Gen Zers it is one of the most used channels with 44% and 46% using it respectively. Overall, Google Maps and Instagram are the most important platforms across the three markets, underlining the need for destinations to curate experiences that are 'Instagrammable', as described above, as well as being to plan and navigate using apps such as Google Maps.

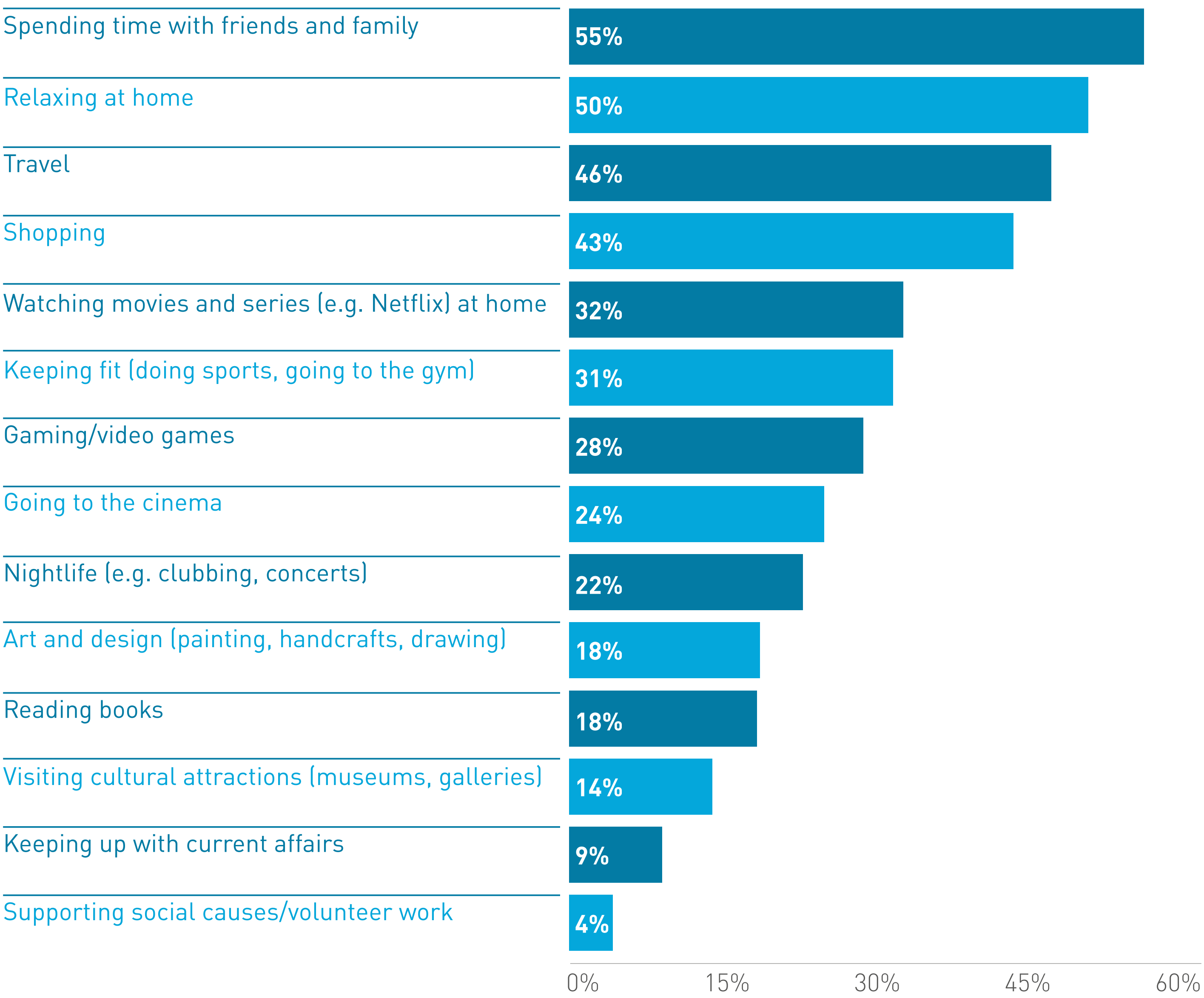
These results also suggest that NTOs, local Destination Marketing and Management Organisations and their partners can still go further in curating their services according to contemporary trends of smartphone use and social media. For example, there is still more room for the proper integration of public transport data within Google Maps, or introducing WhatsApp as a communication tool for accommodation providers and airlines.

2.5. CONSUMER VALUES AND INTERESTS

As explained in the introduction to this report, one of the main objectives of this study was to understand the attitudes and values of Generation Z beyond those purely related to travel, as this would help to build a more complete picture of 'what lies ahead' for tourism in Europe, and offer more insights into the types of travel experiences Gen Zers might seek in the future (Chapter 4). This projection is supported by the findings in the following section, where respondents were asked about their hobbies and interests, as well as the contemporary issues that matter most to them.

2.5.1 Favourite hobbies and interests

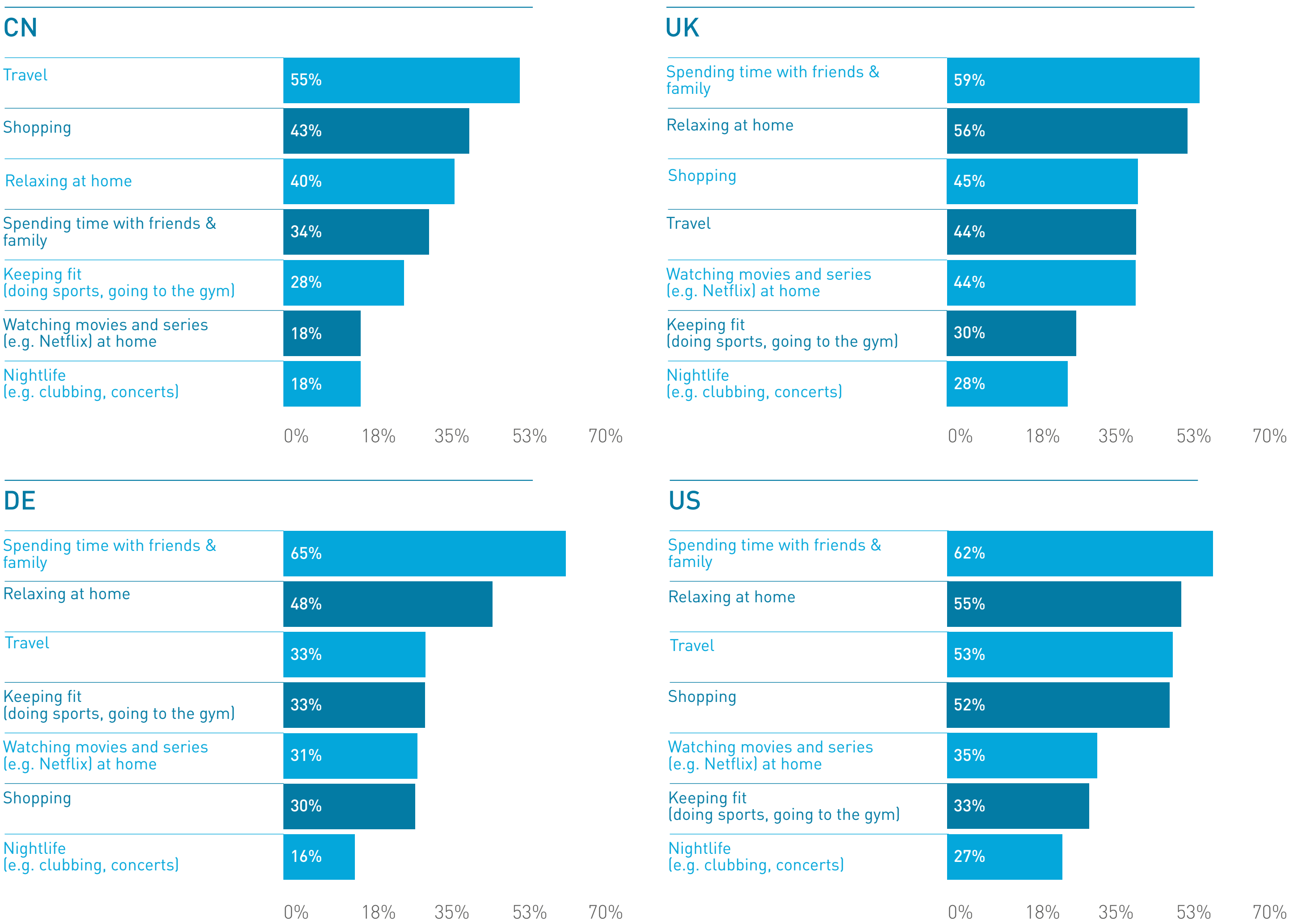
Figure 50: Gen Zers' hobbies and interests



As the resources presented in Chapter 1 show, Gen Zers feel a strong connection with home and family and see them as important influences on their lives. This is evidenced even when they travel (ranked as the 3rd most important hobby), given the importance of keeping in contact with family and updating them in real-time. The high share of Gen Zers preferring to spend time with friends and family may also be explained by a family environment offering reassurance and comfort for a generation that has been described (by our experts) as relatively nervous and fearful.

More broadly, with almost 50% of Gen Zers identifying travelling as a main hobby (more than 50% for Americans, and the highest priority for Chinese respondents), this suggests that travelling has become such an important part in contemporary culture, so that Gen Zers have the potential to be the most travel-active segment ever. Therefore, addressing Gen Zers' desire to travel from an early stage could be a huge advantage for NTOs, as they compete for the hearts and minds of the youngest generation of travellers.

Figure 51: Preferred hobbies and interests of Gen Z per market



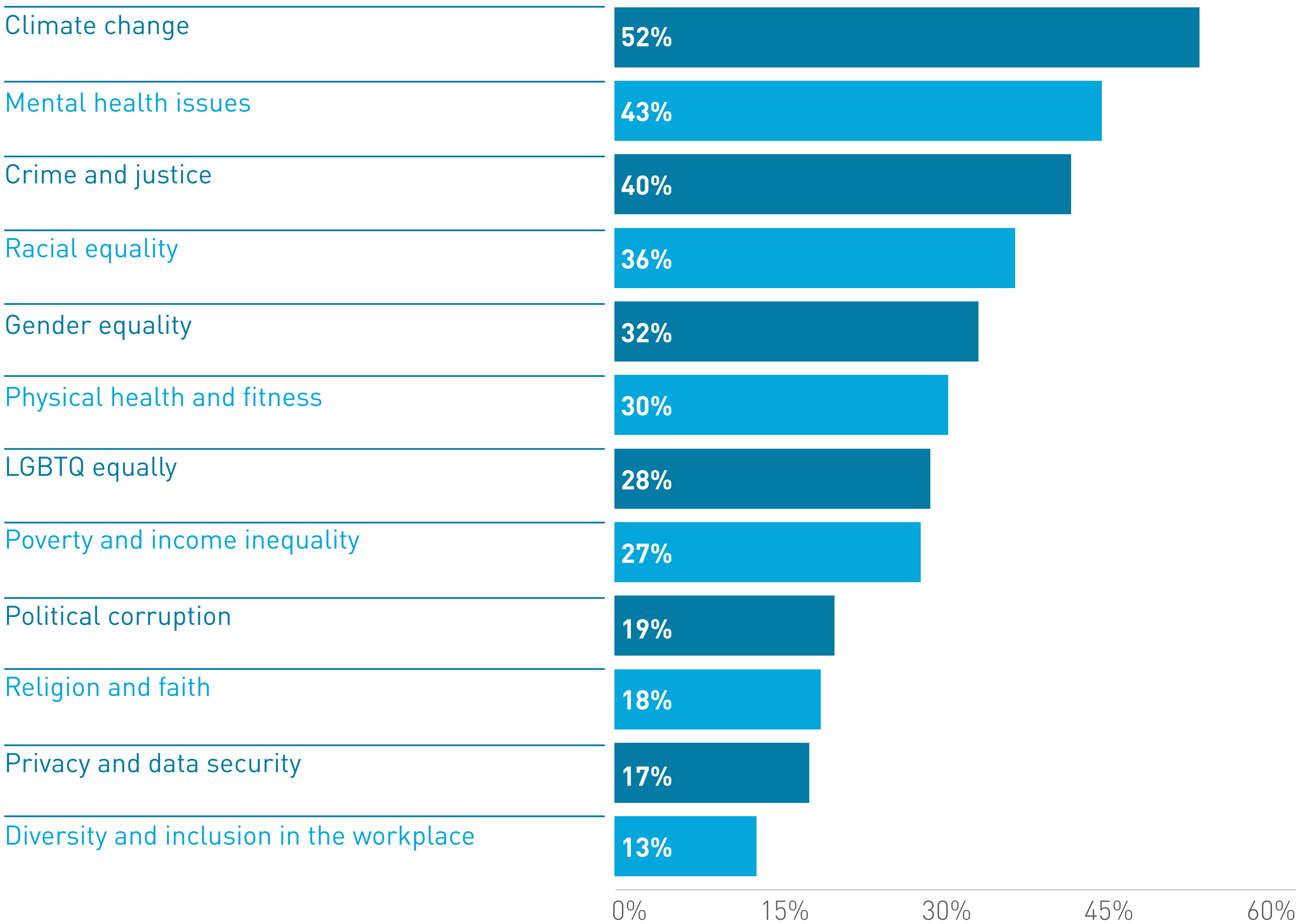
Embracing a healthy lifestyle is another noticeable trend among Gen Zers. In order to address this, NTOs could promote experiences that are more enriching for body and mind; demonstrating that a visit to their destination will leave Gen Zers all-round better people.

It is also interesting to note that while relatively few Gen Zers appear to enjoy the nightlife when at home (22%) it is much more popular as an in-destination activity for 52% of Gen Zers (Figure 11). The same attitude appears to apply to cultural activities, where only 14% have identified it as a hobby while it is much more popular when travelling. This underlines the importance for NTOs of gathering data about the way that Gen Zers actually behave while travelling, rather than basing assumptions purely on their consumer behaviour when at home.

Finally, the popularity of film and TV is notable (watching Netflix and series was more popular than museums, nightlife or art courses). Therefore, presenting a certain destination within the context of a major series could be an effective way to connect with Gen Zers. A good example of this is the popularity of Game of Thrones and the subsequent rise in popularity of certain European destinations that were associated with the series.

2.5.1 Favourite hobbies and interests

Figure 52: Important contemporary issues for American, British and German Gen Zers



Respondents from Germany, the UK and the US were asked which contemporary issues they care most about. ('Caring' was defined as participating actively, sharing news about these issues or discussing with friends). Climate change and mental health are the aspects which are of biggest concerns to Gen Zers. Together with that, progressive ideas related to personal identity such as racial, gender and LGBTQ equality are also of major importance to Gen Zers from these markets.

Figure 53: Important contemporary issues for American, British and German Gen Zers (per market)

The contemporaries of Greta Thunberg have all identified climate change as arguably the most important topic for them, with more than 50% in each market identifying it as the issue with which they engage the most. Furthermore, for American and British Gen Zers, mental health is another critical issue of present-day concern. In fact, for Brits, it is the most concerning element, confirming the recent trend of mental health awareness in the country.

At the same time, issues such as racial, LGBTQ and gender equality are also important to Gen Zers as evidenced through the growth of Pride events in major European destinations, and the greater visibility of racial and sexual diversity that social media allows. Reflecting their strong interest in health and fitness as a hobby, German Gen Zers selected "physical health and fitness" as the third most important issue to them, while a third of Americans and Brits are also concerned with rising inequality in their countries.

Confirming observations made by the research in Chapter 1 and the experts in section 2.7, these findings confirm that growing up in times of climate emergency, more liberal beliefs and mental-health awareness is influencing Gen Zers significantly. In practical means, this would mean constantly highlighting efforts that the tourism sector is making to fight climate change; and demonstrating that this issue is being taken seriously in the destination's political agenda. The politics of identity can also be shown more starkly through marketing; highlighting the presence of racial and sexual diversity, while experiences that contribute positively to mental health (such as rest, wellness and easy access to nature) are also likely to resonate strongly with Gen Zers.

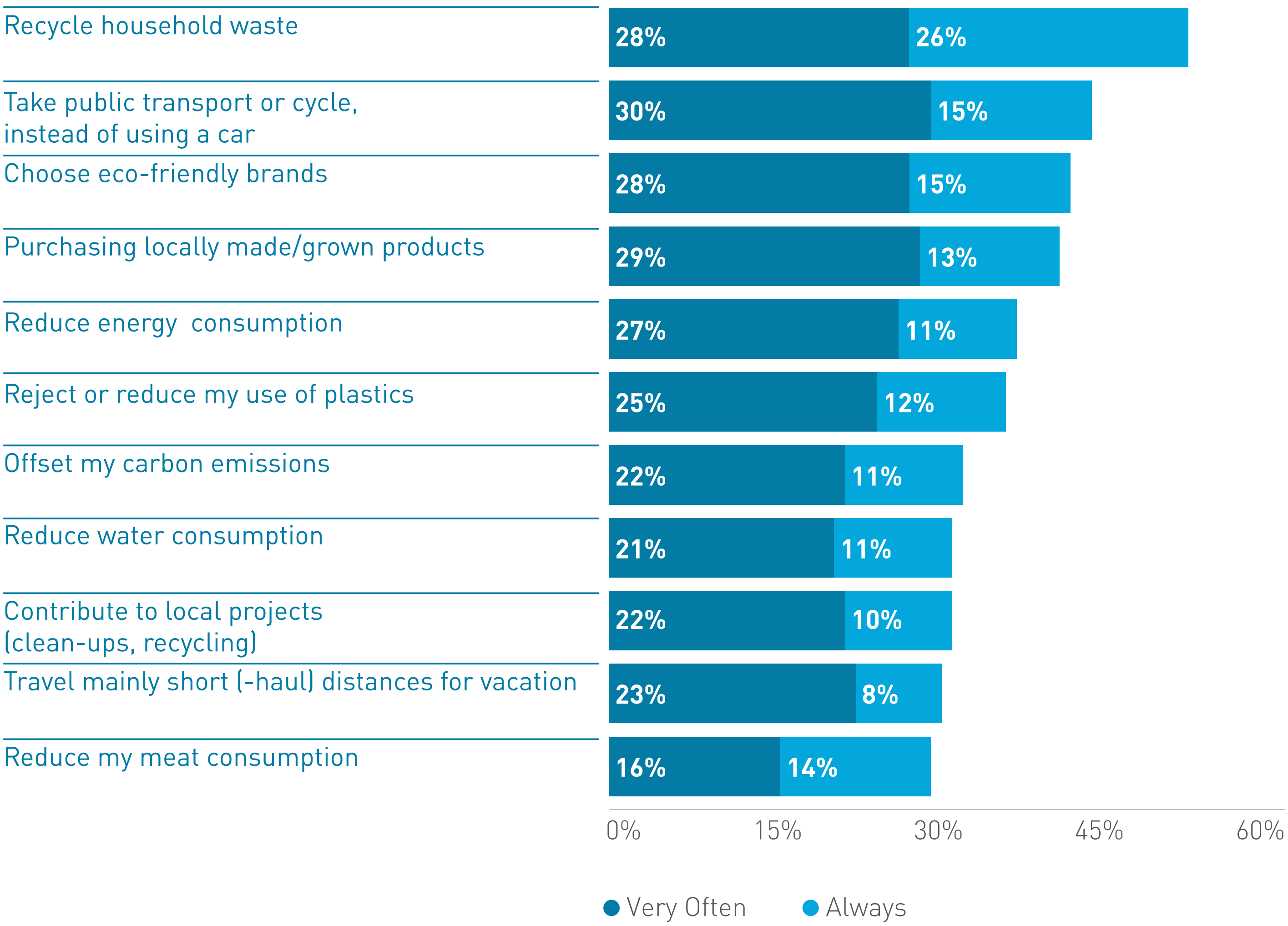
NB: The researchers were unable to pose this question to Chinese respondents as restrictions on discussing sensitive issues online could have disrupted the overall survey data collection.

2.6. SUSTAINABLE TRAVEL CHOICES

In line with the overall objectives of this study, a particular focus was placed on understanding Gen Zers' attitudes towards sustainability, both in terms of Gen Zer's own impact on the environment and their attitudes towards tourism growth and its impact on destinations. The results are presented below.

2.6.1 Personal approaches to protecting the environment

Figure 54: Actions undertaken by Gen Z to reduce their impact on the environment



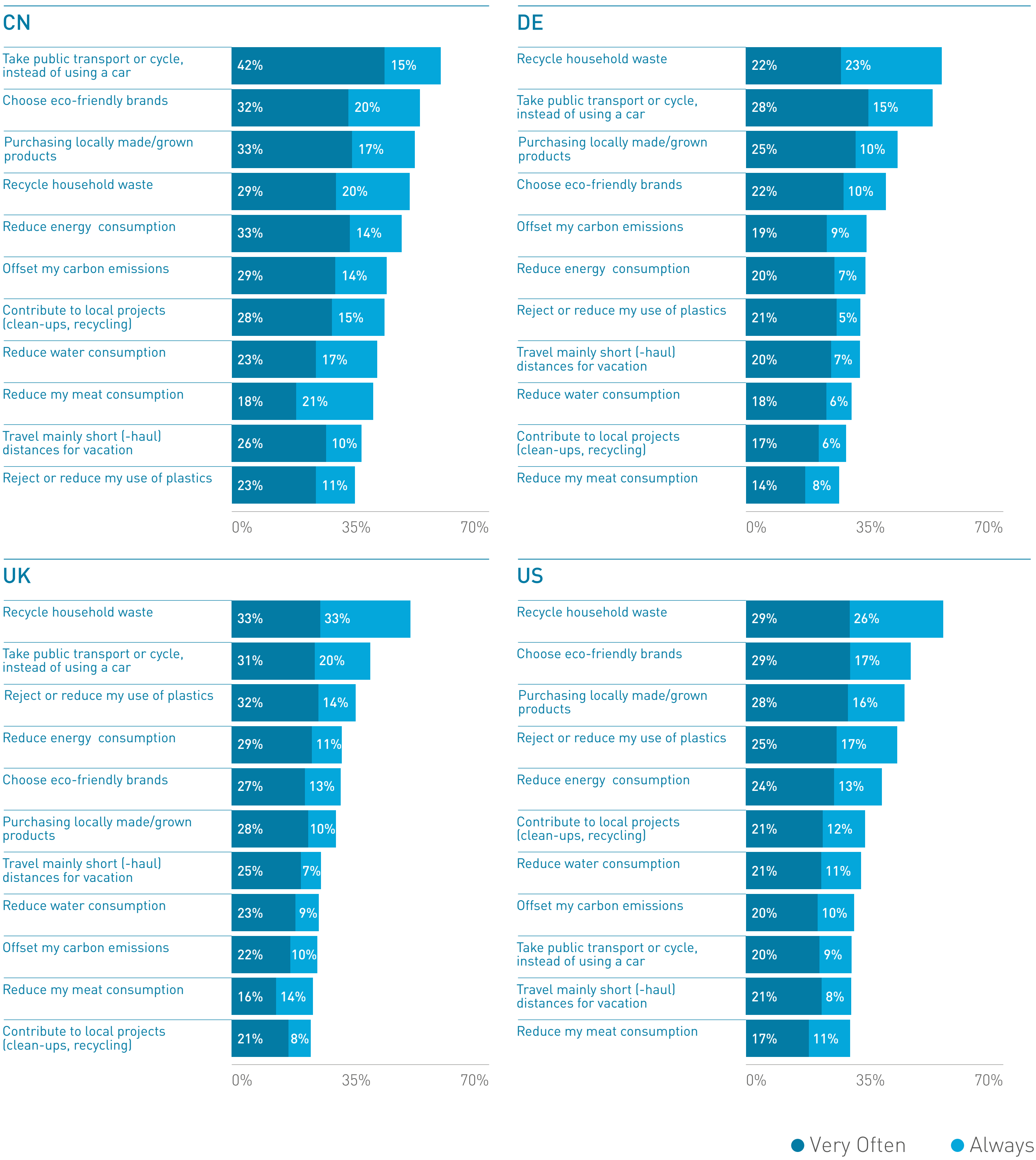
Climate change has dominated the political agenda as Gen Zers have grown up, and this is reflected in the results for this study. Overall, the most popular actions taken by Gen Zers to reduce their impact on the environment are those which are relatively easy and cheap to do, such as recycling and using public transport.

That said, actions such as choosing eco-friendly brands and products that were sourced locally still receive relatively strong support (over 40%), suggesting that Gen Zers are prepared to pay a supplement for reducing their impact where necessary (since locally produced items are often not the cheapest).

Furthermore, the fact that almost 1 in 3 Gen Zers are reducing their meat consumption or are prepared to support a local project that improves the environment are also significant findings for the travel industry. Many restaurants are already responding to changing consumer trends in this area by improving meat-free menus and some destinations have made their first steps to helping younger visitors to actively get involved in beach clean-ups and local education projects, for example the Plastic Whale project in Amsterdam.

While these numbers do not necessarily show a strong appetite for environmentally conscious initiatives by Zers, the fact that they are interested suggests that there is room to convert Gen Zers into active participants in preserving and supporting environmental initiatives in the destination.

Figure 55: Actions undertaken by Gen Z to reduce their impact on the environment per market



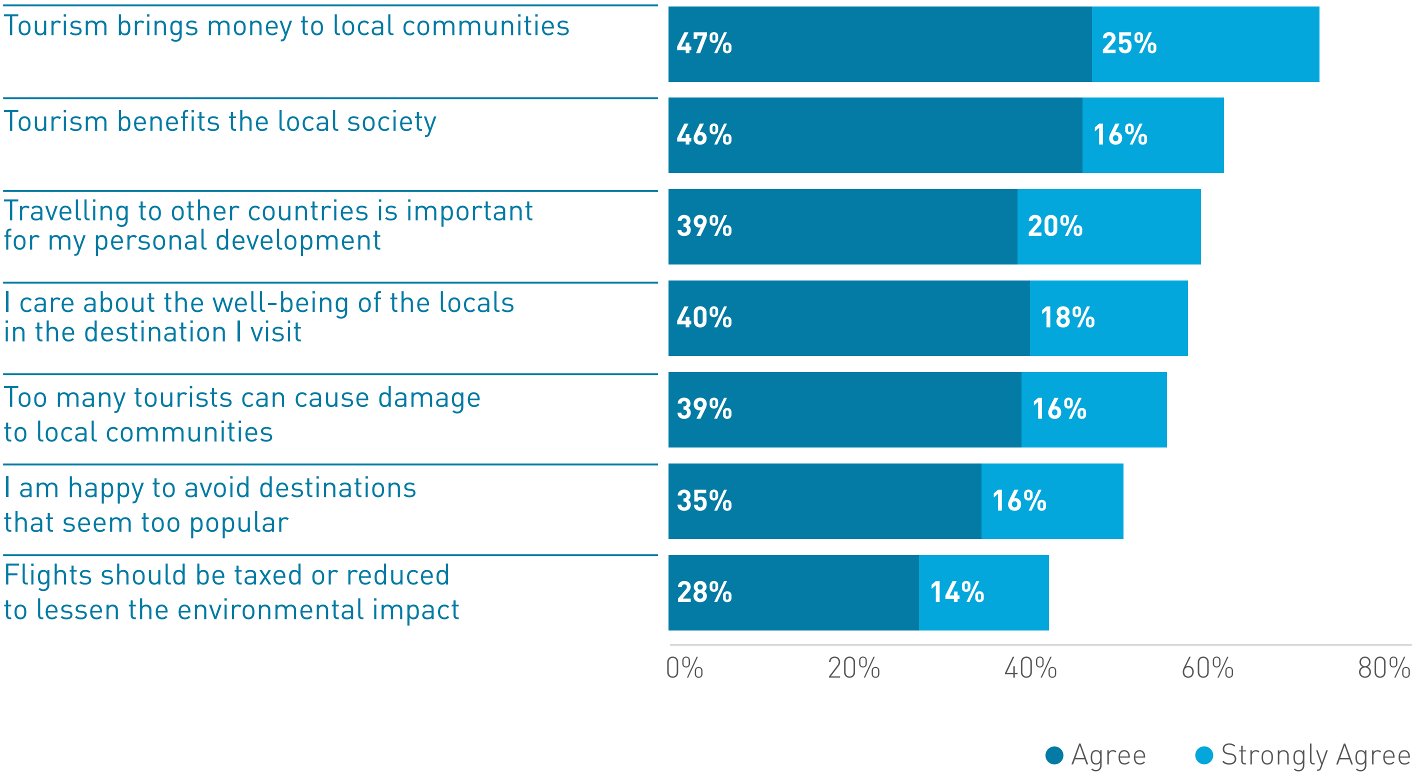
An analysis per market reveals that Germans, British, and Chinese Gen Zers perceive using public transport as an important way to reduce their environmental impact. Addressing these dynamics, DMOs should identify public transport as an important aspect of the whole travel experience and an important point of inspiration for exploring their entire territory. Luxembourg could serve as a good example, as it has become the first country to offer entirely free public transport.[92]

Among the four markets, there is low individual level of commitment to local community projects focused on recycling and cleaning, while also offsetting carbon emissions remains a generally unpopular activity (this may be because offsetting carbon emissions often adds cost to the price of a ticket, or because it does not necessarily lead to a physical reduction in carbon emissions). Moreover, following the Gen Zers' desire to discover the local cuisine when visiting new destinations, it is interesting to note that all four markets believe that environmentally-wise it is important to purchase local food products.

Using public transport, purchasing local products or eco-brands, demonstrates the holistic view that Gen Zers have on sustainability and highlight the range of ways that destinations could use to meet their expectations in this regard. Indeed, these results suggest that efforts should not be solely focused on introducing policies that aim to reduce CO2 emissions, but they should also include promoting products and brands, which are ethical and beneficial for the local population. As indicated earlier, public transport could also be an important element in the whole travel experience of Gen Zers, not only for promotional purposes or as a point of highlighting experiences within the destination, but improving it could be an aspect which helps to validate the wider efforts taken by local authorities to improve their destinations.

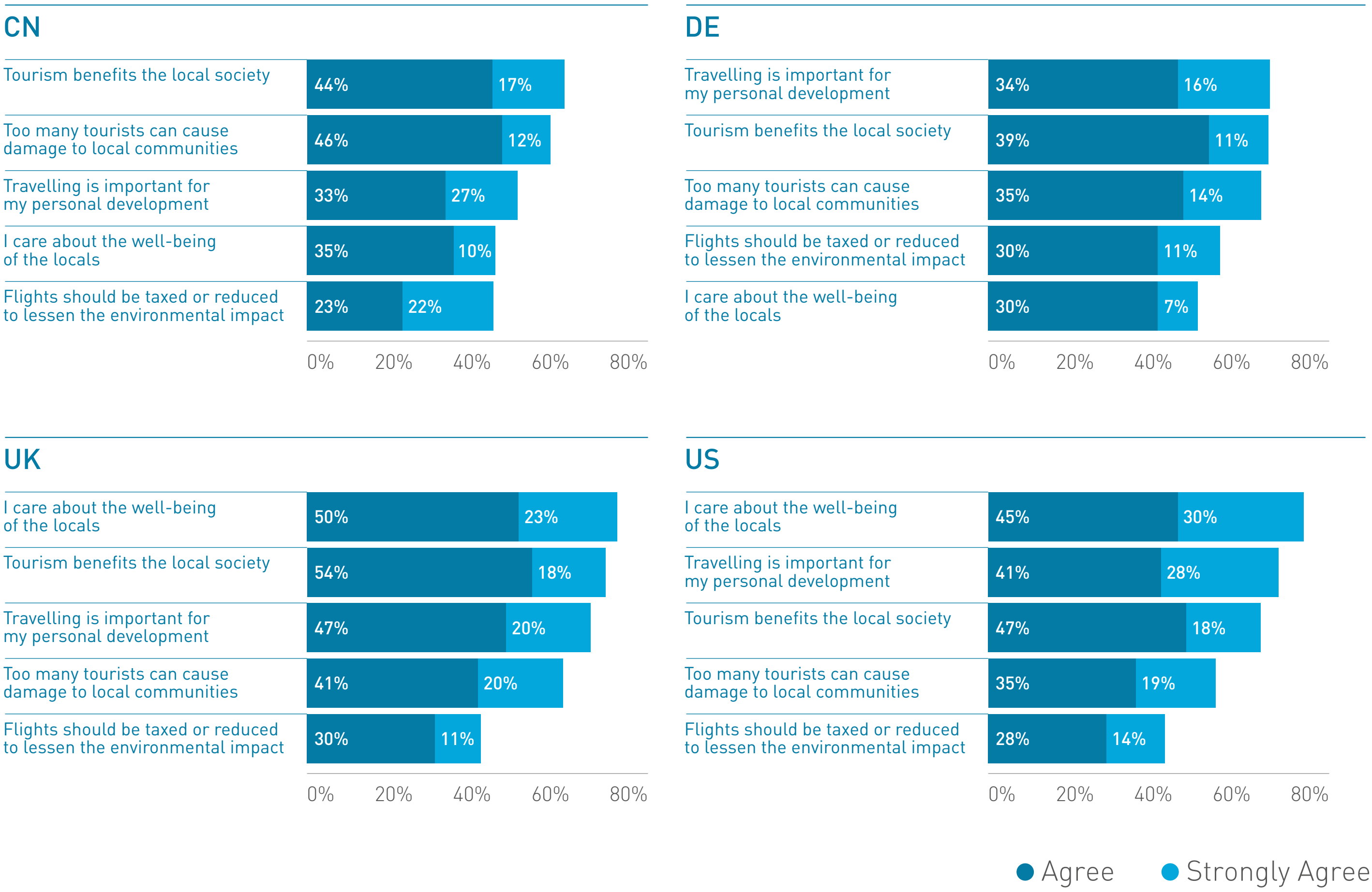
2.6.2 Tourism and its impact on local communities

Figure 56: Gen Zers' views on tourism and sustainability



When asked about the importance and the impact of the tourism industry, Gen Zers perceive the travel sector as a positive contributor to society, and to their own personal development. There also appears to be a high level of general awareness that tourism does have an impact on the lives of local residents. However, the challenges relate to overtourism – which many destinations have faced in recent years – appear to have influenced Gen Zers. Indeed, half of the Gen Zers surveyed appear to be keen on curtailing their own trip to avoid crowded destinations. In regards to introducing higher ticket prices, based on the negative environmental effect of flights, majority of Gen Zers are still not ready to accept such policies. That said, it is still significant that 42% of respondents appear to agree with additional taxation on flights in order to fight climate change.

Figure 57: Gen Z's attitude towards tourism's impact on society per market



All markets appear to share the perspective that tourism is beneficial for local communities, both in social and economic terms. However, respondents from the four markets also agree that too many tourists can negatively influence a destination's local community, demonstrating that the perception of crowding is important, whether a country features popular, historic cities that hit the headlines, or not.

Being a generation that grew up in times of unprecedented connectivity and easiness of travel, Gen Zers have come to believe that travelling is a necessity and a right. They also realise that tourism can have damaging effects, and this can be seen in the universal conviction that too many tourists can be detrimental to the locals. Additionally, just over 40% of Gen Zers in each market agree that flights should be taxed or that the number of flights should be reduced. Despite travelling being an important aspect of the life of Gen Zers, introducing additional taxes which will eventually make prices higher, would be seen as a reasonable decision to take in the context of measures to combat climate change.

2.7. EXPERT INTERVIEWS

The following section contains summaries of the interviews carried out with experts from each of the focus markets. Interviewees were chosen from the research team's network and were specially selected in order to gather perspectives on various sections of the Gen Z age range (8-24 years). The questions used to guide the interviews are featured in the Methodology in Appendix 1. Interview summaries are arranged around similar themes; though different questions were addressed according to the interviewee's own area of expertise.

EXPERT INTERVIEW 1:

DENNY XIA
EXECUTIVE VICE PRESIDENT, EAST WEST MARKETING CHINA

The following section contains summaries of the interviews carried out with experts from each of the focus markets. Interviewees were chosen from the research team's network and were specially selected in order to gather perspectives on various sections of the Gen Z age range (8-24 years). The questions used to guide the interviews are featured in the Methodology in Appendix 1. Interview summaries are arranged around similar themes; though different questions were addressed according to the interviewee's own area of expertise.

Relationship with the China outbound Gen Z market:

Gen Z travellers currently make up around 25% of China's outbound travel market, compared to 46% market share for Millennials, according to the company. However, as this market ages, this share is growing steadily. The company keeps a close watch on the market on behalf of its NTO clients, given the broadly youthful nature of the China outbound market as a whole, which includes a heavy share of Millennial travellers.

General context:

When considering the China outbound Gen Z market, it is first important to consider that this generation was born during the era of China's one-child policy which came to an end in 2014. This means that while the youngest Gen Zers may have a younger sibling, the vast majority of Chinese Gen Zers are only-children and as a result, are often the focus of their family's resources and attention. Only the most privileged, older Gen Zers are likely to have entered the workplace or be funding their travel independently of their family. It is also important to consider that by contrast, many older Chinese Millennials are already travelling as a family, with their partner and children.

Travel motivations:

As opposed to older generations who appear to travel in a more passive style (i.e. ticking destinations off a list, or general sightseeing), Chinese Gen Zers appear to be strongly motivated to travel according to their specific passions, which can often be quite niche, for example to discover how a specific item of food or clothing was made, to buy their favourite, personalised trainers from the brand's flagship store or to see their favourite band in a concert. Other travel experiences are then organised around these activities. In general, popular culture, rather than tradition and heritage seems to be a major reason to select a destination.

Chinese Gen Zers are the most connected generation their country has ever seen, meaning that they are much more in tune with the outside world and curious about visiting it. They are also much more spontaneous; seeing a place visited by a celebrity on social media can quickly lead to a trip booking, with the cost being a secondary consideration.

Online behaviour, inspiration and booking

It is hard to overestimate the amount of time that Chinese Gen Zers spend connected to the Internet, primarily through their smartphones and to the major social media networks Weibo and WeChat. There is a strong preference for viewing and creating short video vlogs, as well as taking photos. Much attention is taken to making images attractive through editing and careful composition. Gen Zers are highly image-conscious and know that their audience is watching. The travel experience is shared heavily in real-time through short videos and across multiple platforms. The same is true of travel advertising; to have any effect on Gen Z, it must be delivered across multiple channels. Any content (especially written) that is long or demands sustained attention is often skipped in favour of more digestible content.

Destination choice

Given that Gen Zers are bombarded with content across multiple platforms, it is difficult for destinations to make an impression from a distance; brands (e.g. clothing or tech brands) seem to attract far more loyalty. That said, when destinations demonstrate that they constantly have new experiences, activities and attractions to offer, this can attract multiple visits. With iconic clothing and tech brands, Japan is proving to be a successful destination in this regard, while in Europe, France and Italy seem appealing because they are well known for their wide variety of experiences related to nature and history.

Perceptions of Europe

Compared to the US, Japan and South Korea (that seem eye-catching because of their associations with fast-moving popular culture), Europe appears to offer experiences that are more predictable. While destinations in Asia often launch special exhibitions or promotions to attract Chinese visitors, this is much less common in Europe, leading to the perception that European destinations are less interested in innovating or adapting in order to attract the Chinese Gen Z market. Meanwhile, few European destinations appear to show their youth culture as an attraction, preferring instead to pump out content relating mainly to heritage and traditions.

Attitudes and interests around sustainability

While older Chinese generations appear to be more accepting of official positions, Chinese Gen Zers appear more questioning around controversial issues, such as climate change. Being more connected with the rest of the world, they are keen to adopt what they view as the same global mindset as Gen Zers in Europe and the US. The young Swedish climate activist Greta Thunberg has appeared widely in the Chinese media and like her, Chinese Gen Zers appear more aware of their responsibility to the planet. Chinese Gen Zers also appear to be more relaxed than older generations around other issues, such as sexual orientation, gender equality and recreational drugs.

Recommendations for European NTOs:

- It is important to show commitment to the Chinese market over a period of time in order to gain credibility in the eyes of the travel trade
- Be prepared to show the uniqueness of your country, compared to neighbours. Use storytelling, instead of using bland descriptions or official information
- Showcase youth culture, and destinations that are related to popular film/TV series
- Help to curate these destinations with other broader packages that help Chinese Gen Zers to get the most from their visit and enjoy a unique, authentic experiences (for example, fly-drive options)
- It is important to use a consistent message across multiple channels to have the desired effect
- To reach Gen Z, focus on consumer marketing rather than trade marketing

EXPERT INTERVIEW 2:

CATHARINA FISCHER
CONSULTANT AND NETWORK PARTNER, TOURISMUSZUKUNFT, GERMANY

Tourismuszukunft is a tourism consultancy specialised in supporting destinations, hotels and airlines in all digital activities throughout the German-speaking countries, helping to design the future for those companies and organisations in the tourism industry. Catharina Fischer is a consultant and network partner and is also a former head of social media for the German National Tourist Board.

Relationship with the German outbound Gen Z market:

Gen Z is considered in many service design processes and target group analysis, especially when the company creates and implements tourism strategies.

General context:

Since destination marketing organisations often have only a limited budget, they have to prioritise their spending, and given the spending power of older travellers, it is perhaps understandable that they channel their spending towards these groups. However, it is important to underline that Gen Z seems especially worthy of attention, given the fact that they seem to be behaving in unique ways and are unafraid to question the status quo.

On a broader note, it is important to recognise the general shifts occurring in the workplace, particularly in the country's major industries. Professions such as car manufacturing that have supported thousands of jobs across the country for decades are shifting quickly to automation and will disappear as the car industry will change dramatically over the next decade. Meanwhile, the Internet is leading to a greater amount of location-independent, flexible working. With that in mind Gen Z will question the status quo of the traditional nine to five job as they understand very well what possibilities are available and how to utilise the advantages of the online world. This could well lead to a less stable, more nomadic workforce with young Germans seeking more opportunities abroad and with it the possibility to travel more. A work and travel period will therefore not only be a highlight for some months after their studies, but rather a normal way of living.

Travel motivations:

Being constantly connected online and bombarded with so much content can make it difficult for individual destinations to stand out. Crucially, however, social media has shown that many amazing experiences around the world are in reach. While a trip to Thailand or the Grand Canyon was considered a 'once in a lifetime' trip for older generations, for Gen Zers these are seen as normal and attainable. Social media has, therefore, made Gen Zers more demanding travellers; not necessarily in terms of luxury service but in terms of the level of authenticity they expect from their journeys. To be attracted to visit somewhere, Gen Zers want to know how the visit will make them feel, how close they can get to the action and how authentic the destination is. They are prepared to research widely and contrast different reviews in order to build up a picture of this.

Online behaviour, inspiration and booking

For German Gen Zers, social media is the place to be, and has become an essential aspect of marketing. Like other markets, Gen Zers seem more comfortable using instant messaging rather than speaking on the phone or waiting for an email response. While older generations use instant messaging (e.g. WhatsApp, Facebook Messenger) mainly for private use, there is a growing expectation among Gen Zers to use it when interacting with a company too.

Another crucial aspect is their ability to consume almost whatever they want and whenever they want online. Video content plays an important role in their lives, as this generation was never connected to wires to begin with. YouTube, Netflix and other streaming providers have made it easy to step in different, exciting worlds through their favourite series or influencer.

Recent studies show that 85% of teens now consume content on YouTube, while the average time kids spend watching online videos has doubled in the last four years. And when speaking of YouTube, it is not just about entertainment. For 80% of Gen Z the platform has helped them become more knowledgeable about something and for 68% YouTube has helped to improve or gain skills that will better prepare them for the future.

Therefore, generic marketing videos and logos will fail with this generation as they understand this form of online content primarily as a source of information and education. A successful video marketing should take this into consideration.

Perceptions of Europe

For German Gen Zers, borderless travel around Europe is seen as natural. Taking cheap flights to get around Europe is still highly popular, however, concern around the climate has led to a resurgence of interest around long-distance bus and train travel, especially Interrailing. For this reason, there is a renewed interest in destinations in Southeast Europe that are accessible by train. Finally, the resurgence of Berlin as a thriving, international hub for start-ups has also increased the city's appeal for young Germans too.

Attitudes and interests around sustainability

Generation Z is the most sustainability-conscious generation Germany has ever seen. It is common for them to ask questions relating to environmental impact and to seek reassurance before spending their money with a particular brand. The 'Fridays for the Future' climate protest movement is unprecedented and widely popular and has pushed climate change further up the political agenda in Germany. Gen Zers appeared to lead in rejecting the government's recent package of measures around the environment and even insisted that the 10€ aviation tax per ton of C02 was raised to 180€. The fact that such a radical policy has received widespread support across Germany's youngest generation (many of whom are old enough to vote) will increase pressure on the air transport industry to accelerate moves to reduce their impact on the environment.

When travelling, German Gen Zers want strong reassurances around the environmental and social impact of their trip. They are keen to get involved and feel like they have contributed to improving their destination in some way and are prepared to pay a premium for this if the right reassurances are in place. This raises major questions for companies selling the traditional sun and beach package product.

It is also important to underline that similar to other markets, German Gen Zers are a lot more open-minded than their older counterparts around issues, such as sexual orientation and gender identity. Having grown up seeing a lot more female role models through the media in business and politics, younger German females now have higher expectations around their own career path and have more courage to start up their own business, for example.

Recommendations for European NTOs:

- In terms of understanding Millennials and Gen Z, a lot of catch-up is necessary; it is essential to pay closer attention to Gen Z because, like Millennials they are at the forefront of so many important shifts in society.
- Do not underestimate their willingness to challenge the status-quo; with so much online information at their hands they are very educated in a way other generations are not
- To convince Gen Zers to buy a tourism product or service destinations have to go beyond dry explanations and demonstrate how it will make them feel; being honest, personable and authentic
- This is a thoughtful generation; positivity and life-affirming choices are important for them.

EXPERT INTERVIEW 3:

ANNA FAWCETT
GLOBAL HEAD OF MARKETING, TOPDECK TRAVEL, UNITED KINGDOM

Topdeck Travel is a leading global travel agent and tour operator for customers aged 18-39 (with an average customer age range of 23-26 years). The company's largest outbound market is Australia and New Zealand, with UK outbound representing around 35,000 passengers per year, or around 11% of the company's client base. The company operates over 160 different tours across Europe, typically consisting of multi-country tours by coach that include a wide range of local tours and activities. Anna Fawcett is the company's Global Head of Marketing and has previously worked for three years with VisitBritain.

Relationship with the German outbound Gen Z market:

Given the strong focus on the youth market, the company pays close attention to young consumer trends. The company's marketing campaigns are widely regarded as leaders in the market. The company has also done its own quantitative surveys of 2,000 young people globally as well as in-depth follow-up interviews.

General context:

While Millennials are perceived to be the first young generation to embrace technology widely, and often grew up with a perception that 'anything is possible', Gen Z's perceptions globally (and particularly in the UK) seem to have been shaped by constant negative headlines relating to issues, such as climate change, Brexit, the US elections and a sense of global insecurity in the aftermath of 9-11. The result is that Gen Zers can often seem to be quite a serious generation, and outwardly despairing about the state of the world. However, their sense of collective responsibility to address global issues is evident, through news and views shared on social media.

Social media shapes their self-image; aware that they have an online audience, Gen Zers are careful about what they show and to whom. They often feel pressure to show others that they are leading healthy, responsible lifestyles and that the food they eat, the places they visit and activities they do say a lot about who they are.

Travel motivations:

For Gen Zers, travel often represents a refreshing escape from long periods of screen time, an opportunity to build confidence and personal relationships through meeting new people in new situations, away from home. Gaining experience through travel is also seen as an important social currency and a way to build respect among peers. Since so much of the travel experience is shared online - often in real-time - there is a strong appeal in finding unique locations and doing activities that others have not done or shared multiple times online.

Online behaviour, inspiration and booking

It goes without saying that engaging with Gen Zers through social media is vitally important. Instagram is the leading channel for this; however it is important to bear in mind that other channels such as TikTok can emerge (and disappear) quickly; therefore it is important to watch youth social media habits very closely. One habit observed is that of maintaining multiple 'Finstagram' (fake) Instagram accounts, showing multiple dimensions of one's daily life or personality, as well as that of 'dark posting', i.e. posting specific content that can only be viewed by targeted groups of users.

For a generation bombarded by content, travel reviews are used heavily to help with decision-making, and inspiration comes increasingly from sources such as Netflix films and TV series. Curiously, printed brochures have seen a resurgence for Gen Zers who like the 'real-world' feeling of browsing an attractive brochure or magazine.

If brands are attractive and convincing enough online and in the real world, they can often become the target of obsession, seeing some brands (e.g. in apparel, cosmetics or accessories) as friends rather than as suppliers. This perception appears to be growing for travel brands too.

Perceptions of Europe

In spite of the UK's exit from the European Union, UK Gen Zers broadly regard themselves as European, and are relaxed about the increasingly multicultural world in which they have grown up. Trip choice among UK Gen Z customers (who are largely students and young professionals) appears to differ between those who live in London and the Southeast, and those who live elsewhere. Those in and around the capital know that they are able to fly pretty much anywhere with ease, while those in the rest of the country who are not able to access a major airport so easily stick more to the company's classic destinations for the youth market.

Attitudes and interests around sustainability

There is strong evidence to suggest that sustainability is a major issue for both Millennials and Gen Z, with a cohort from both generations who will actively seek out brands that have strong credentials around their social and environmental impact. For this reason, it is important that travel brands (and destinations) must be able to clearly explain their approach to these issues, in an upfront, transparent way and demonstrate clear results. Failure to do so can lead to Gen Zers complaining loudly online about a lack of transparency or progress around these issues. With more travel impact-related stories in the media, the requirement to pay tourist taxes and respect the local population in a destination is becoming seen as completely normal.

Recommendations for European NTOs:

- European NTOs could benefit widely from embracing Gen Z, however this would require a fundamental shift in approach; from seeking to meet quotas and targets to being brave enough to listen directly to young people, to promoting young talent internally and concentrating outwardly on what Gen Z customers are looking for as opposed to seeking to meet quotas and targets
- It is important to engage with Gen Zers 'on their level' in a personable way with easily accessible, transparent information
- For a generation dealing with anxiety and fears about themselves and the state of the world, travel can be a welcome break and an opportunity to build confidence and respect from others; this new dimension could be effective in marketing campaigns aimed at Gen Z.

EXPERT INTERVIEW 4:

CARYLANN ASSANTE CAE

CEO, THE STUDENT & YOUTH TRAVEL ASSOCIATION, UNITED STATES

The Student and Youth Travel Association (SYTA) is North America's leading industry association for tourism companies specialising in school and university age students in the United States. For over 10 years, Carylann Assante has led the organisation.

Relationship with the US outbound Gen Z market:

SYTA carries out student travel research with a focus on Gen Z travellers, and provides education, networking and advocacy for its members. Carylann speaks regularly with tour operators, sales agents and teachers who are involved in selling educational tours to Europe and other world regions.

General context:

Being constantly connected and using mobile devices regularly from a young age, American Gen Zers are increasingly in tune with the rest of the world and are more likely to socialise online rather than offline. Gen Z travellers are more culturally diverse and agents planning trips must be aware of any potential impact on the students' experience in a destination. Historically, young Americans who took educational tours were predominantly from suburban middle-class families and today this is changing with the population growth in urban cities and the diversity of today's schools. The tradition of travelling with their school may not exist and these families are less likely to afford or approve of their students travelling. This requires agents to concentrate much more on reassuring families of the positive impact of travel on their students.

Finally, in a similar way to the UK market, it seems that American Gen Zers are highly sensitive to how they are viewed online, and keen to be leading a healthy lifestyle. It seems to be this factor that accounts for lower alcohol consumption among Gen Zers, rather than a lack of adventure.

Travel motivations:

The search for authenticity – seeing the place where a certain TV series was filmed, or a music video was created - is now a major motivating factor for travelling, and in choosing a particular destination. Rather than touring sites quickly and passively, many American Gen Zers seem more interested in slowing down and taking the time to get to know how people live in the places they are visiting. They also want to be able to have some sort of positive impact with their visit; and ensure that the places they visit are better off as a result of tourism. This is evidenced by the increase in volunteer travel and gap years (which many US universities now accept), whereas the traditional hedonistic spring break trip appears to be in gentle decline.

Online behaviour, inspiration and booking

When it comes to smartphone behaviour when travelling, it appears that American Gen Zers use their smartphones to 'dig deeper' and seek information about their desired product or service more intensely. This means wanting to understand the story behind it and what others are saying about it. Short videos, shared through Instagram (or increasingly, TikTok) are the most popular type of content.

Perceptions of Europe

For under 18s (in particular, school groups) traditional destinations, such as France, Spain, Italy and the UK are still popular, however for older Gen Zers, countries, such as Croatia, Hungary and the Czech Republic are rapidly becoming better known. Countries that have shown commitment to the US market, such as Scotland (through promoting culture and festivals) have also seen increases. Concerns around crowding in popular cities, such as Amsterdam and Venice (and local authorities' measures to deal with this) have also led tour groups to choose secondary cities where it is easier to plan visits.

Attitudes and interests around sustainability

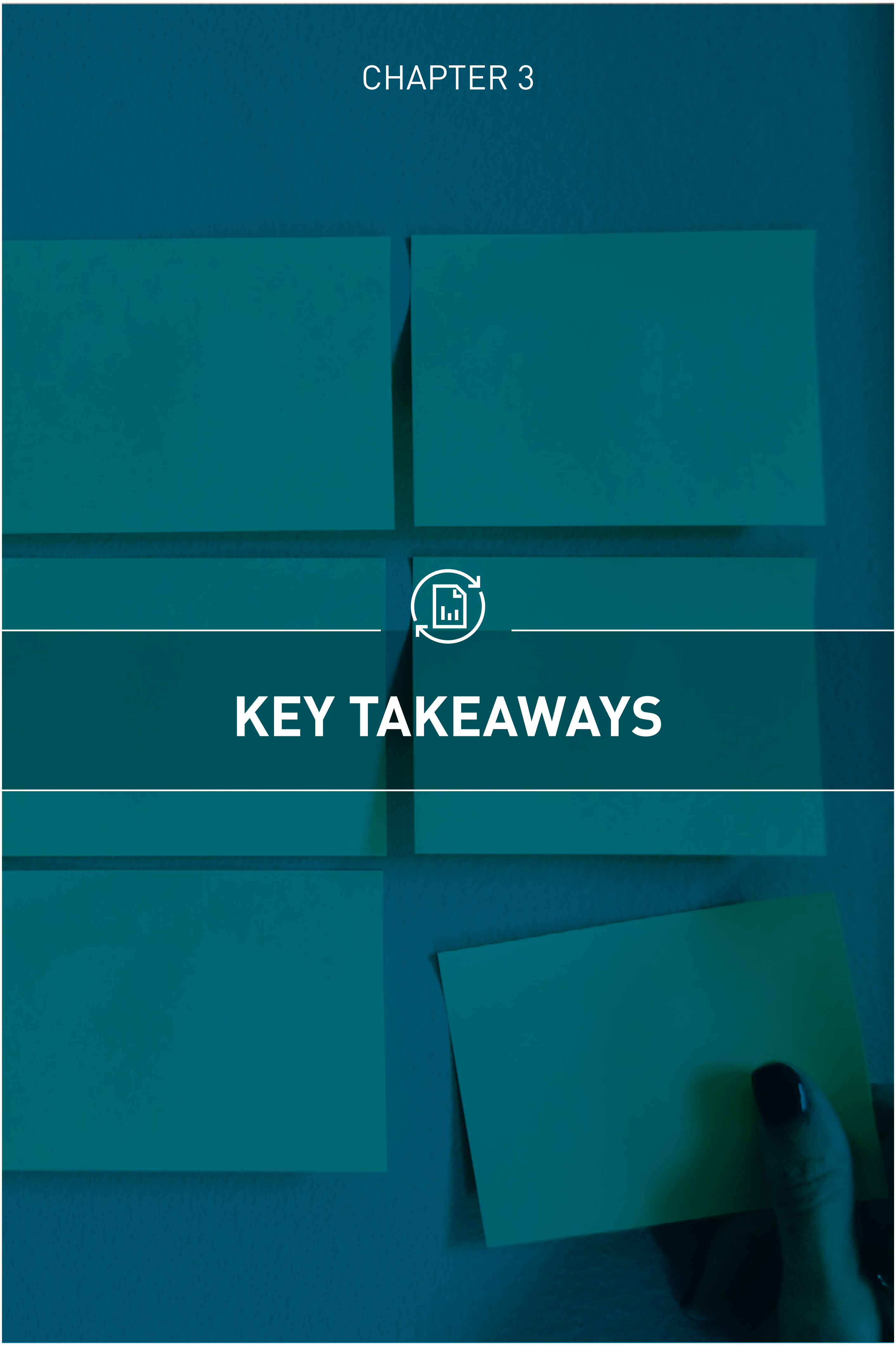
American Gen Zers are gradually becoming attuned to the issues around climate change and the environment, and if services are adapted to reduce the climate impact and are still convenient, they will become popular. Group tours often use a lot of single-use materials (such as plastic water bottles), and though groups often bring their own refillable bottles, many destinations have not adapted to allow students to fill them, thus adding to the problem.

Recommendations for European NTOs:

- SYTA collaborates with around 20 European NTOs on a regular basis (e.g. at trade fairs and in providing logistical support and advice for group travel). Long-term commitment to the market is important, as group tours often take up to two years to plan, so the lead time on bookings is long
- In engaging with Gen Zers it is vital to provide the most immersive and compelling stories possible; where the potential visitor is being told where they will be staying, what they will be eating, seeing, smelling and experiencing throughout the journey. Involving young people from the destination in promotion so it is they who are telling the story is even more compelling (i.e. as an invitation to visit and experience).
- Students are also more connected with their friends and family back home, and are a little more streetwise when travelling, however providing practical information to reassure students and parents is always welcome.

CHAPTER 3

KEY TAKEAWAYS



This study has evaluated the values and attitudes of Generation Z from a variety of perspectives. While Gen Zers' attitudes towards travel have been at the heart of this study, understanding the way they see the world in general, and the issues that they take seriously offers a compelling insight into the way their preferences could shape Europe's tourism sector in the future. This is particularly the case with the issue of sustainability, which during this generation's formative years has risen quickly up the global political agenda and taken on a more holistic meaning than its traditional association with the environment alone.

The following key takeaways and recommendations are intended to guide Europe's NTOs, DMOs and their tourism industry partners in planning ahead and adapting their services to Generation Z.

3.1. OVERARCHING TAKEAWAY: ADAPTING TO A GENERATION THAT SEES THE WORLD DIFFERENTLY

Situation: Europe's NTOs and DMOs face the need to engage with a new generation of travellers who are digitally native, globally connected and serious about changing the world around them.

HEADLINE RECOMMENDATIONS:

- **Gen Z are not homogenous:**

  When conducting in-depth market research and developing strategies around Gen Z travellers, take specific age groups into account, acknowledging that young people in different age groups exhibit quite different consumer preferences at different stages of their development.

- **Be open-minded about an open-minded generation:**

  The research in this study has shown a mixed picture with regard to Gen Zers' spending priorities. While younger travellers typically lack spending power, this study suggests that Gen Zers from Germany and the UK, in particular, are prepared to pay for premium products where they can see a clear benefit.

- **Work with young people when developing products and marketing campaigns:**

  Engaging with Gen Zers through focus groups and consumer research can provide useful insights about local youth culture, and thereby ensure that both the products and campaigns are more authentic and credible. Furthermore, building and empowering a young workforce within NTOs can help to ensure that an organisation understand and adapt to the behaviour of Gen Zers more intuitively.

3.2. DESIGN PRODUCTS AND SERVICES FOR DIGITAL NATIVES

Situation: As the first fully digitally native generation, Gen Zers are highly skilled at using tech to satisfy their needs at all stages of their journey, requiring European destinations to adapt their approach to marketing and product development.

- **Tourism businesses that do not have an online presence, or are difficult to find and interact with online, can be considered irrelevant - offline = irrelevant.**

  The widespread adoption of digital devices driven by Millennials has only intensified with Gen Zers. This generation is strongly mobile-first and expects to tie up the various elements of their trip seamlessly, being able to plan and book every step with a smartphone, smart speaker or wearable devices. This means tourism businesses must continually adapt to ensure that they are searchable with the devices and also the channels that Gen Zers are using.

- **Customer service in real-time:**

  Artificial intelligence has already enabled the use of chatbots and smart speakers to meet travellers' needs, and this is expected to expand. Gen Zers increasingly expect their customer service needs to be met in real-time with instant messaging services, such as WhatsApp and Facebook Messenger. NTOs may wish to consider installing a multilingual chatbot to allow for an immediate answer to questions from, or working with partners to develop their Live Chat/WhatsApp/WeChat options.

- **Engage with Gen Zers on an equal basis:**

  Gen Zers expect their relationship with brands to be on a peer to peer basis, where they like and share each other's views and content, rather than just receiving a flow of content from one source. Gen Zers increasingly socialise and seek attention online; not only from close social contacts but the companies they trade with too.

- **Make connectivity easy:**

  Gen Zers - especially those from long-haul markets, such as China or the US will expect high-speed Wi-Fi and 4/5G communications. "Instagrammable" moments are so important and thus it is important to work with telecommunication companies to ensure that the infrastructure for fast connection and live streaming is present.

- **Be clear and honest around pricing and the use of personal data:**

  The findings of both the consumer research and desk research for this study underlined that Gen Zers value transparency around pricing as well as terms and conditions. Opaque pricing, hidden costs, unethical or opportunistic selling may be quickly called out through social channels, creating reputational damage that may be difficult to repair. Furthermore, it is vital to be clear about how Gen Zers' personal data is used, how long for, and who has access to it.

3.3. ATTRACT THE ATTENTION OF A DISTRACTED GENERATION

Situation: Gen Zers are heavy users of social media and both create and consume content constantly, so European destinations could struggle to stand out in the crowd.

- **Content must be compelling and immersive.**

  Rather than explaining what a destination has in terms of main attractions, Gen Zers need to be compelled to visit through persuasive storytelling. Gen Zers need to understand how an experience will make them feel, what they will see, hear and taste, and why it is unique.

- **Content as dialogue:**

  Tools, such as Instagram Stories, and TikTok have shown how live videos can be brought to life and made interactive with polls, quizzes, fun responses and reposting user-generated content. The more a destination can be seen to be 'live' and 'evolving', the higher its appeal to Gen Zers.

- **Capitalise on new opportunities, quickly:**

  Trip planning by Gen Zers is increasingly spontaneous and in reaction to unexpected events and celebrity endorsements. It will be essential for NTOs to show agility in identifying such developments or trending topics and capitalise on them at an early stage. Agility is also important for NTOs to manage their negative or positive impact, where necessary, quickly moving budgets and resources to set up campaigns and make the most of media exposure to highlight alternative destinations or top insider tips to visiting the country.

- **Advice and recommendations from a trusted source:**

  Gen Zers have grown up to question the information they read and images that they see; they expect transparency and appreciate frank, official advice from a trusted source; European NTOs can play this role as an impartial guide to visiting their destinations and getting the most from them (e.g. how to avoid the crowds, how to stay safe, etc.).

- **Storytelling in the right places:**

  Since Gen Z crave experiences, those destinations that can offer "wow" moments be they unique places, people or monuments (either personal, physical or cultural) need to be easily found and tagged via the various platforms that Gen Z use in their particular country of origin. Gen Z has a short attention span and needs condensed, engaging stories for them to interact with, ultimately resulting in them becoming more attracted to the destination.

- **Enhance digital interaction through virtual reality (VR) and augmented reality (AR):**

  Promotion and engagement through VR in the pre-trip phase and AR during trips will be important tools to not only attract - but to show off a destination. AR tools via mobile that allow travellers to explore other destinations in their language are likely to be introduced as standard in the future.

- **Build a distinctive message around contemporary culture:**

  Whereas many European countries have usually placed their history, traditions and historic monuments at the forefront of their promotional campaigns (especially to long-haul markets), the research for this report found that Gen Zers are often more interested in a country's youth culture; the food, fashion, music, celebrities and other cultural trends that they follow. These, combined with young people playing active roles in promotional campaigns are much more personalised and easier for Gen Zers to identify with.

- **Build empathy and a more meaningful relationship with Gen Zers**

  The ability to empathise with Gen Z is another critical factor here. To be engaged, Gen Zers need to be moved. How can stories around the destination be shaped to resonate with the issues that Gen Zers care about (such as, climate change, health and wellbeing or personal identity)? How can these issues be woven into interactive experiences and attractive bundles of services? The ability to connect and empathise with their audience will determine whether destinations and tourism professionals will manage to catch the imagination of Gen Zers long before their leisure trip starts.

Case study: BETA Youth Travel Workshop

The British Youth Travel Association's Youth Travel Workshop is a one-day B2B event that enables NTOs to lead trade missions to meet UK tour operators, travel agents and platforms that are specifically interested in youth travel. SYTA (see section 2.7) operates a similar event in the United States, demonstrating the power of trade associations in youth travel to instigate these connections and help the tourism sector to learn more about the dynamics of the Gen Z market.

https://www.youthtravelworkshop.com/

3.4. HELP TO IMPROVE THE LIVES OF GEN Z VISITORS AND THE PLACES THEY VISIT

Situation: Gen Zers are highly aware of the world around them and the challenges it faces. They also see travel as the key to self-improvement, to help them become wiser, more confident, healthier and more globally aware. European destinations should harness these aspirations and use them to move away from the pattern of 'growth for the sake of it' towards a model that helps Gen Zers to give back to the destinations they visit.

- **Harness imagination but be pragmatic:**

  Gen Zers are ready to question the status quo and established rules, especially among companies and institutions that fail to reflect their values and aspirations. Gen Zers have grown up accurately aware of global challenges, such as climate change and the economic crisis (and now the effects of Covid-19). Destinations all over Europe can raise Gen Zers expectations through creative marketing, but they must also ensure that what is promised can also be delivered, that it is realistic in terms of budget and that the experiences which are offered can benefit the environment and local communities.

- **Transmit values, not just attractions:**

  Gen Z are far more accepting of social and ethnic minorities, so destinations that openly celebrate diversity in all its forms and are not ashamed to shout about it through their marketing channels can quickly win approval from Gen Zers, and be held up as a good example through their reposts. Crucially, this open approach must not just be limited to marketing channels, but thorough training and education with tourism businesses to ensure that the destination can deliver on the marketing promise.

- **Help visitors to play their part:**

  According to McKinsey, Gen Zers also see their own consumption as an expression of individual identity, and as a matter of ethical concern. It follows then that Gen Zers care about their impact on the environment and local communities when they travel. Therefore, European NTOs will need to:

  - Think carefully about the type of image they project with regard to their country's approach to fighting climate change.
  - Highlight products and experiences that are kind to the environment and local communities, or even give back through volunteering, charitable donations or logistical support.
  - Help all travellers (especially keen Gen Zers) with tips and advice on how to travel responsibly.
  - Work with industry partners on implementing a responsible tourism agenda more widely throughout the local tourism sector. For example, supporting local producers and elevating their product, reducing the consumption of single-use plastics, stimulating environmentally-friendly transport, promoting ethical products and proper working conditions in tourism establishments, introducing "green" initiatives and even adopting more ethnically inclusive promotional campaigns, are just some of the elements on which destinations can work.

- **Develop products that are built around healthy living and self-improvement,**

  helping Gen Zers to feel that they are able to keep up with their healthy routines while travelling. This extends to diet; in the coming decade Gen Zers will outpace Millennials as the biggest market for vegan or vegetarian food, therefore highlighting such culinary options and stimulating the development of healthier food options in the local hospitality industry would be beneficial

- **Provide a safe and welcoming environment:**

  Make sure that Gen Zers have an environment where they can be socially comfortable in destinations. In light of Gen Zers' increased issues with regards to mental health and loneliness, service providers need to be aware of creating welcoming environments that allow Gen Zers to not only engage with the product but also with each other.

CHAPTER 4

WHAT LIES AHEAD?

TWELVE TRENDS DRIVEN BY GEN Z

A process of reshaping the tourism industry, which already started with Millennials will make a full circle with Generation Z. As has been observed throughout this report, Generation Z has, within a relatively short number of years, been shaped by waves of disruptive technology, political turbulence and most recently the effects of the COVID-19 outbreak, the consequences of which will change the global economy and society for decades to come.

The following twelve trends illustrate what Europe's tourism sector could expect to see in terms of both supply and demand, in the coming 10-15 years as Gen Zers grow from children, students and young adults to become fully economically active, and with that, the primary decision-makers in travel:

1. TEMPORARY DISCONNECTION BUT A GREATER DESIRE FOR TRAVEL

While Gen Z is one of the lowest risk groups in the coronavirus epidemic, living life under lockdown and the constant saturation of news about the virus and the economy is likely to have proved stressful for an already-nervous generation. Once travel restrictions are lifted, Gen Zers are likely to seek to visit friends and family and travel closer to familiar surroundings. They may attempt to disconnect briefly from daily life and their immediate surroundings while reconnecting with friends and heading to destinations that are familiar and comforting. Taking into account that Gen Zers grew up in a world defined easily accessible travel, where travelling has become deeply embedded in contemporary culture, it is likely that Gen Zers will be keen to get back on the road only once it is safe to do so. Seeing friends travel on social media is likely to prove to be a strong pull factor for booking travel.

2. THE JOURNEY WILL ONCE AGAIN BECOME AS IMPORTANT AS THE DESTINATION

While airlines will be keen to recover from the COVID-19 outbreak, flight-shaming may well continue to keep many Gen Zers firmly on the ground. Following the example of Greta Thunberg, together with the unprecedented fall of air pollution in major cities during the coronavirus lockdown, they may be determined to find new, creative ways to travel around Europe. In recent years the sale of rail passes allowing travel through multiple European countries have seen a strong resurgence, and rail companies are revamping long-distance night trains to capitalise on the new demand too. At the same time, long-distance car and bus travel that is flexible, affordable, and frequent could encourage more Gen Zers to choose slower methods of travel over flying, thereby lowering Gen Zers' environmental impact and increasing their online social capital among friends.

3. TRAVELLING AS A PSYCHOLOGICAL AND EMOTIONAL RESCUE

Gen Zers have already proved that they expect to get more from their trips than photos of monuments and museums. Surrounded by the constant presence of technology, Gen Zers will crave "real" experiences. In return, travel can offer them limitless opportunities to combat loneliness, build social skills, and self-confidence. In the post-COVID-19 socially distant world travelling could also be the desired method for an escape from daily life back home, or job uncertainty. Tour operators, guides, accommodation providers and attractions that understand travel's role as a remedy will quickly win approval as Gen Zers' experiences are shared online, helping to amplify travel's powerful effect on the senses.

4. LEADING A FLEXIBLE LIFESTYLE COULD PROVE TO BE AN OPPORTUNITY FOR SECONDARY DESTINATIONS

If Millennials formed the first tribes of footloose 'global nomads', then Gen Zers are likely to follow this trend even more intensively. The COVID-19 outbreak forced millions of students and young professionals across the world to work remotely and while it disrupted work and educational life, project management platforms and online conference tools proved that work and study could really be flexible. As businesses switch to automation, use artificial intelligence, and seek to solve problems rapidly, Gen Zers are increasingly likely to compete for jobs on a freelance basis, working from wherever they choose. Working and studying remotely will be the new normal for greater sections of the working population. For many Gen Zers this will be their first taste of the world of work.

As a result, demand for flexible work and living spaces, in appealing locations with affordable cost of living and good transport connections, will give an opportunity to secondary destinations. In this way, they will be extending a trend that Millennials started. Smaller towns and villages that may wish to repopulate with people who cannot afford city life may have a powerful pitch to Gen Zers who seek a better, slower quality of life.

5. ROAMING IN A CONTINENT WITH FEWER PHYSICAL AND DIGITAL BORDERS

As Gen Zers live and work nomadically, they are likely to want to take their home comforts and healthy habits with them. The first generation to grow up inside the Schengen common travel area, Gen Zers recognise the significance of borders less than older generations. Following the trend started by mobile roaming, Gen Zers expect to be able to use the same apps and digital services whichever country they are in, whether this is for banking, taxis, gym passes, or food delivery. This will require businesses across the tourism sector - both big and small - to reinforce their presence on universally popular apps and adapt their products to attract this curious and globally-minded group of travellers.

6. KNOWING MORE ABOUT TRAVELLERS THAN THEY KNOW ABOUT THEMSELVES

If until recently market researchers in the tourism sector (among others) were collecting, storing and analysing data primarily related to travel experiences (e.g. Google searches, footfall, social media activity), within the next decade this approach will become even more holistic and it will involve a wide variety of sources. Non-travel related sources, such as Netflix or Amazon are likely to be used to predict travel demand and consumer behaviour. Neuromarketing techniques will become more widely used in the travel sector. They are likely to be boosted by analysing heavy social media use or sophisticated facial coding systems to determine customers' true emotional reaction within a hotel or a certain place of interest. Investing in harvesting data, establishing data-dedicated departments, or collaborating with major apps will be a prerequisite for the tourism industry, to predict Gen Zers' consumption patterns with much greater accuracy.

7. ACCELERATING SEAMLESS CONNECTIVITY

In the coming years, European countries will see the roll-out of 5G networks capable of supporting augmented reality systems and live streaming at much faster speeds than were possible in the past. Internet blackspots will gradually disappear, and flexible, free internet will become the norm. Fast internet connections will be a prerequisite for any accommodation provider or visitor attraction in order to deliver key aspects of the visitor experience (especially digitalised, contactless customer service).

Cities (where large numbers of visitors and locals are concentrated) are likely to partner with mobile operating systems to support augmented visits, and create high-quality virtual reality tours that will allow travellers to become much more familiar with destinations before they visit, to help improve trip planning. This will also enable cities to understand much more about who is visiting and what they are looking for, while virtual tours and increased use of Google Streetview type services will mean that Gen Zers could arrive in their destination being much more familiar with the destination and being able to navigate it with more ease.

...WHILE PUSHING MORE CONSUMERS TO SEEK A DIGITAL DETOX?

COVID19 has accelerated the use of technology across society, with even greater amounts of time spent online. At the same time, this could drive greater sectors of society (e.g. education, communication, health, art, etc.) to identify such constant connectivity with negative emotions. During the last few decades, society has undergone a profound change in the methods of communication, where physical contact has been substituted by "dehumanised" communication through the internet. This has been especially the case for Generation Z, and the current pandemic has intensified these dynamics even more. If social distancing becomes the new norm and work, school and social life become predominantly online, it is then possible that people could build resentment towards the pressure of being constantly connected, driving people to seek more authentic, shared, and humane experiences. With regard to travel, this may suggest that high-quality, warm, personal service may become even more valued. Digitisation of attractions, such as museums and galleries, or the implementation of AI and robotics in the hospitality industry could be perceived negatively.

8. NEW DEMOGRAPHICS OPEN UP NEW OPPORTUNITIES FOR EUROPE'S ECONOMY

As described in section 1.4, Africa, Asia, and Latin America account for nearly 2 in 3 of the world's Gen Zers, meaning that youngsters from these world regions are likely to account for a greater share of global travellers than in the past.

Looking beyond the mere concept of travel, Europe as a safe and culturally rich continent makes it a potentially attractive destination for younger workers in Africa, Asia, Latin America and the Middle East. As many European countries have ageing populations and need a young, skilled workforce this could see some immigration measures relaxed, allowing Gen Zers from other world regions to study and work in Europe. This could lead to a growth in companies that facilitate the connection between travel and work experience (or longer work stays) in Europe, for Gen Zers. As a result, companies that can successfully package study, accommodation, and immersive leisure experiences and sell them in these outbound markets stand to prosper.

9. STRONGER STANCE ON PROGRESSIVE VALUES

Gen Zers have proved to be the most open-minded generation when it comes to issues, such as race, skin colour, sexual orientation, and gender identity. This suggests that they may be attracted to visit places that have a greater acceptance of freedom of expression and are known to defend liberal values and protect minorities against discrimination. Destinations that are clear about their progressive political agenda through the use of soft diplomacy and smart communication could, therefore, stand to benefit from the loyalty of Gen Z travellers in the years to come.

10. LONGER AND MULTIPURPOSE VACATIONS, IN MULTIPURPOSE ESTABLISHMENTS

The demands of flexible working may mean that Gen Zers will increasingly seek to combine work and leisure when they travel. The dynamics of remote work, universal connectivity, flexible lifestyle, and borderless services mentioned above could trigger a new way of travelling where youngsters would go for two weeks or even a month to work from a remote place, without draining their vacation days. With longer stays, this could lead to Gen Zers seeking a deeper integration in the local culture of the places they spend time in. Therefore, destinations and in particular accommodation establishments may seek to adapt their services around longer-term demand. This may include providing short term rentals with designated office space and facilities, or hotels and hostels that incorporate working spaces.

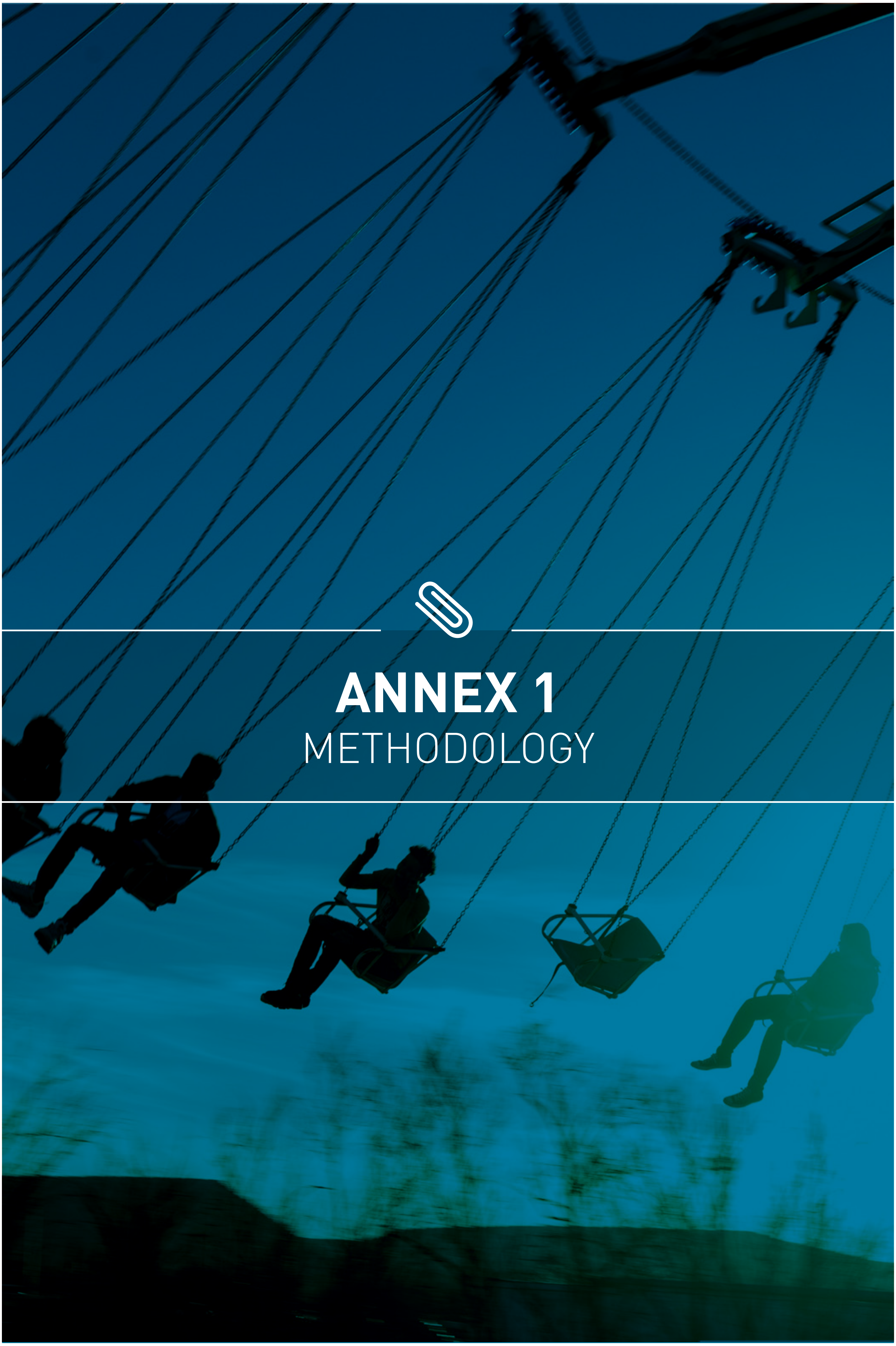
Taking into account the recent cases of hotels becoming temporarily transformed into hospitals during the COVID-19 epidemic, accommodation establishments can become more than a place to provide a bed and relaxation. Hotels could introduce co-working spaces or have an increased health service role, in a post-pandemic world. Similarly, cities will reshape around the accelerated trend of home-working, while reduced demand for commuting will ultimately force changes in transport infrastructure. Furthermore, the health of local communities and the liveability of neighbourhoods will become even more important. In fact, expensive, high-dense areas like city centres could see even more depopulation in the future.

11. IN A POST-COVID-19 WORLD, SUSTAINABILITY WILL GAIN EVEN MORE IMPORTANCE

Globally, Gen Zers are serious about sustainability and are prepared to stick to or avoid brands, depending on their sustainability performance. This is likely to spread to destinations too, with tourism providers and local governments either praised or criticised publicly online for the way they treat local communities and the environment. The recently enforced lockdowns uncovered the attraction of places that were less polluted or densely populated. For this reason, destinations may use the COVID-19 slump as an opportunity to press the 'reset' button and redefine new limits/targets for tourism growth. Together with that, the case for a circular economy has generated a new push, where due to the economic slowdown and criticism of overconsumption, society may abandon the linear economy model. Tourism suppliers that adopt such models from an early stage could triumph in the long run.

12. CLIMATE CHANGE WILL CAUSE FURTHER DISRUPTION TO DESTINATIONS AND TRAVEL PLAN

Climate change still remains a major topic of concern, and beyond Covid-19 is expected to be the defining political priority of this era. The coronavirus outbreak and the economic slowdown have put on hold the implementation of policies focused on the climate emergency and despite it being temporarily side-lined in media and society, climate change still remains a crucial challenge. In the future, extreme weather events and temperature rises could see Gen Zers facing frequent disruption to their travel plan, and it could put some destinations out of action. Cases of extreme weather (e.g. floods, hurricanes, wildfires) or force majeure events will become more frequent within the coming decade, especially if destinations do not use the present momentum for implementing environmentally friendly measures. Otherwise, Gen Zers could become the first generation that will grow up with the notion of not visiting a particular destination because of challenges related to climate change.



ANNEX 1
METHODOLOGY

Research methodology

Primary research – methodology

The primary research for this report consisted of both qualitative and quantitative methods:

Qualitative research

During the period November 2019 – January 2020 interviews were held with one expert for each of the four focus markets for this study; China, Germany, the United Kingdom and the United States. Interviewees were selected based on their role and experience in engaging with the Gen Z travel market across all ages in the Gen Z spectrum (8-24 years).

The aim of the interviews was to add qualitative insights that could be used to compare or contrast with the desk research, as well as the data gathered from the consumer survey. Seve pre-agreed questions were used to guide the interview. In some cases, they were adapted to suit the interviewee's area of expertise. The main topics that were addressed during the interviews were the attitude of Gen Z towards travel, the fundamental differences between Gen Zers and Millenials, the perception of Europe as a destination and what methods are effective when targeting youngsters, among others.

Quantitative research

An online consumer survey was disseminated in December 2019, to a total of 2,800 respondents divided equally (n = 700) between each of the four focus markets (China, Germany, the United Kingdom and the United States). The survey was distributed through an online polling software service to an equal share of male and female respondents aged between 18 and 24 years (i.e. the oldest share of the Gen Z age group). This sample was chosen based on the fact that older Gen Zers are the most likely to be financially independent and are therefore more likely to have acquired travel experience. Aside from age and gender criteria, a screening question was used to select respondents who plan to take a trip to a European country in the next three years.

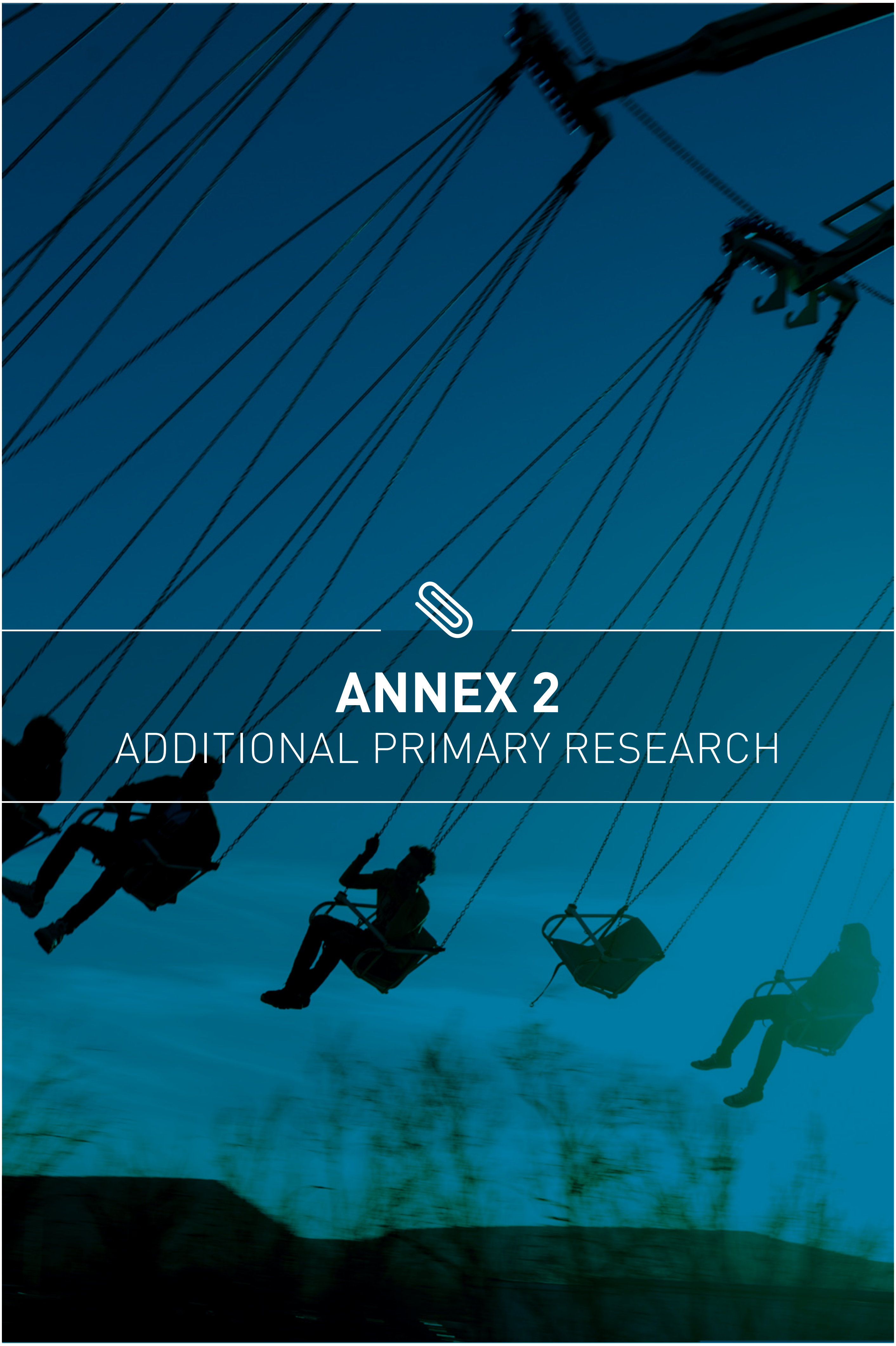
The survey consisted of 16 questions seeking to understand travel motivations and preferences. These included: the respondents' reasons for choosing a particular destination, sources of inspiration, preferred in-destination activities, travel booking patterns, hobbies and interests, community and environmental awareness, among others.

Secondary Research- methodology

In preparing this report, a thorough review of literature was conducted. A comprehensive and holistic overview of this generation was outlined, using a wide range of journals, reports, and articles together with market-specific papers from leading research organisations and industry associations. References to all materials used are included in the footnotes of this paper.

In the context of this report, 'Europe' relates to the 32 members of the European Travel Commission, plus France, Sweden, Turkey and the United Kingdom. The following list of 36 countries was offered to respondents when asked to select destinations on their wish list:

1. Austria
2. Belgium
3. Bulgaria
4. Croatia
5. Cyprus
6. Czech Republic
7. Denmark
8. Estonia
9. Finland
10. France
11. Germany
12. Greece
13. Hungary
14. Iceland
15. Ireland
16. Italy
17. Latvia
18. Lithuania
19. Luxembourg
20. Malta
21. Montenegro
23. Norway
24. Netherlands
25. Poland
26. Portugal
27. Romania
28. San Marino
29. Serbia
30. Slovak Republic
31. Slovenia
32. Spain
33. Sweden
34. Switzerland
35. Turkey
36. United Kingdom



ANNEX 2
ADDITIONAL PRIMARY RESEARCH

PREFERRED EUROPEAN DESTINATIONS, BY MARKET

Figure 58: Preferred European destinations for US Gen Z travellers

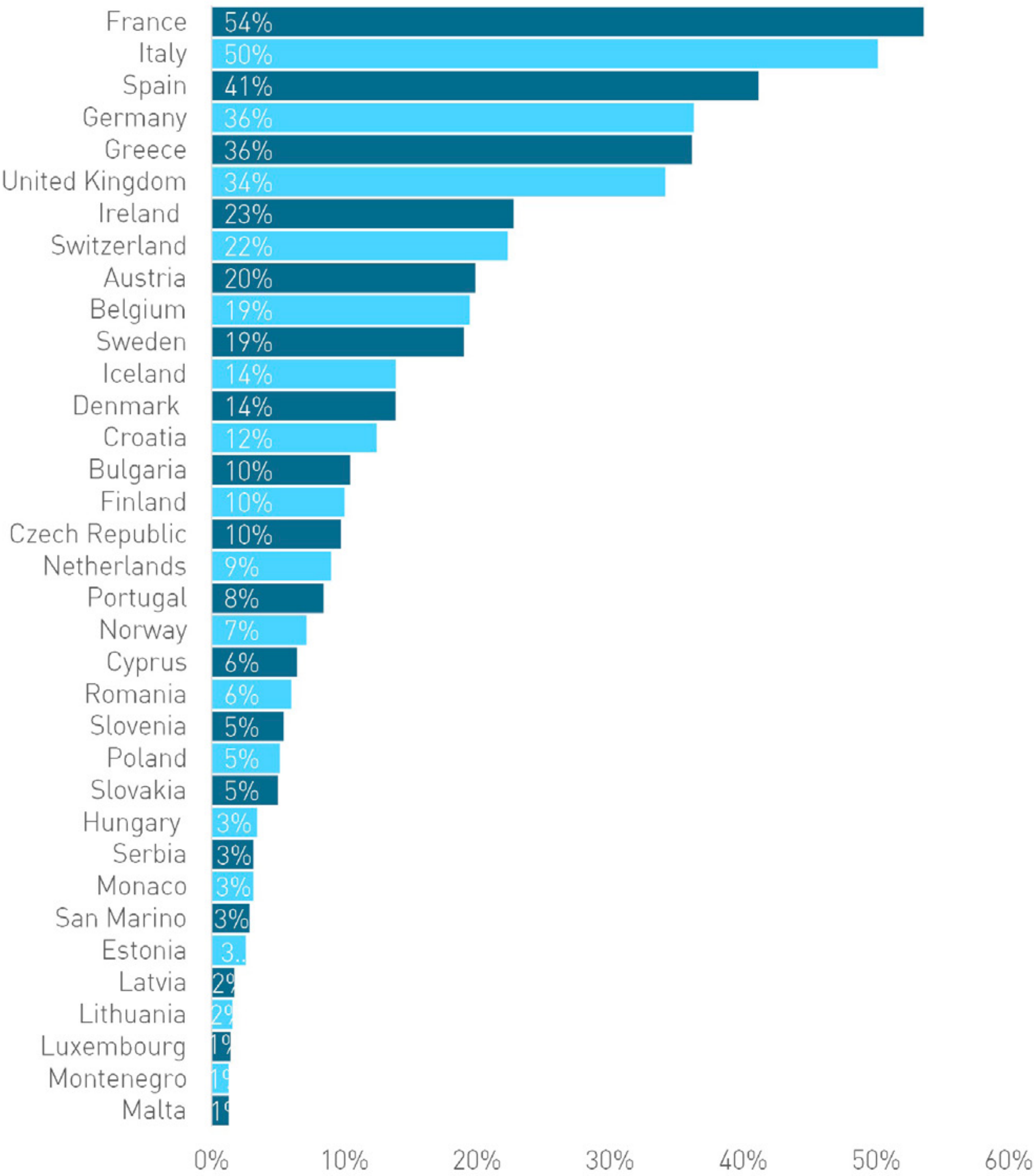


Figure 59: Preferred European destinations for UK Gen Z travellers

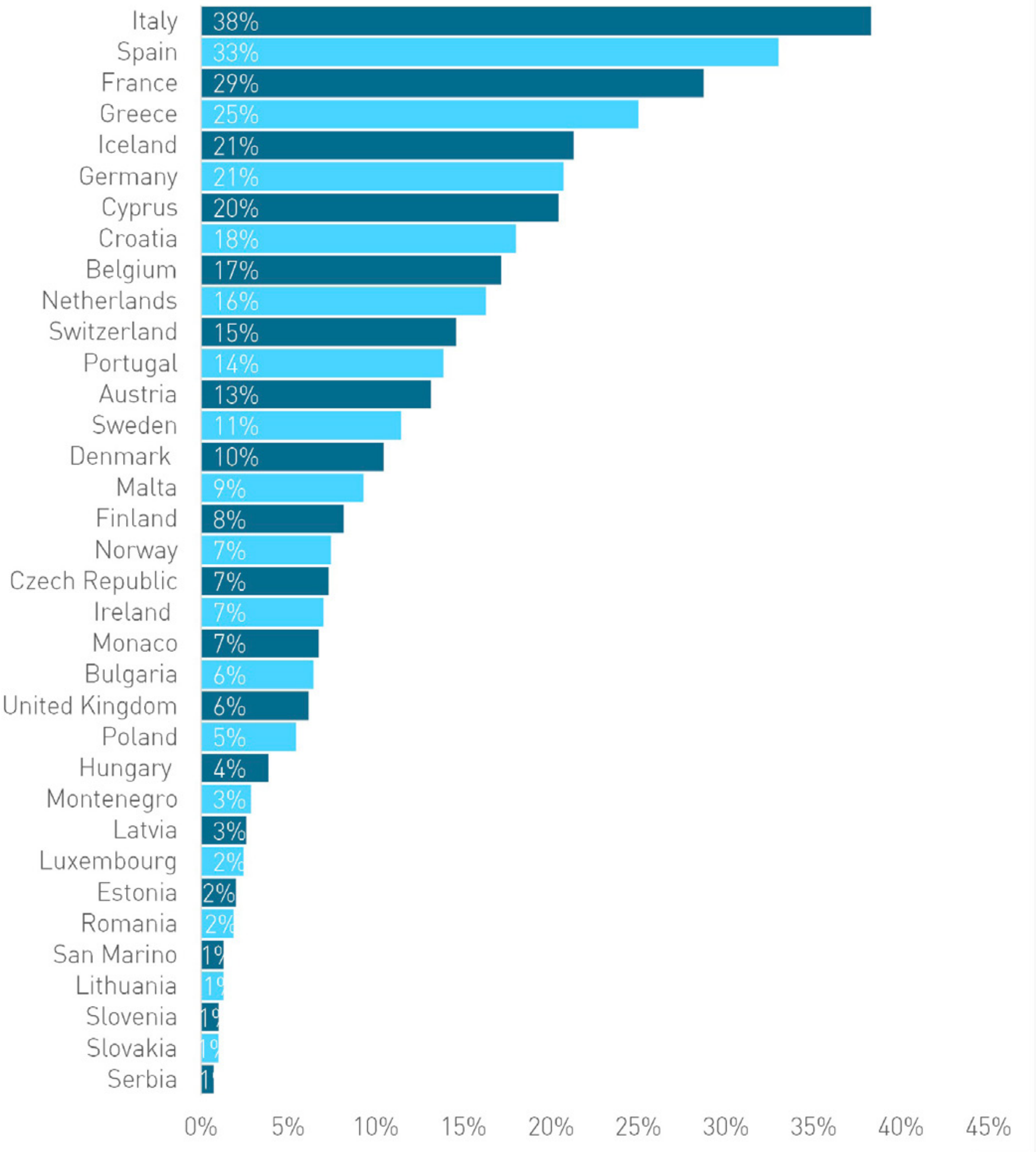


Figure 60: Preferred European destinations for German Gen Z travellers

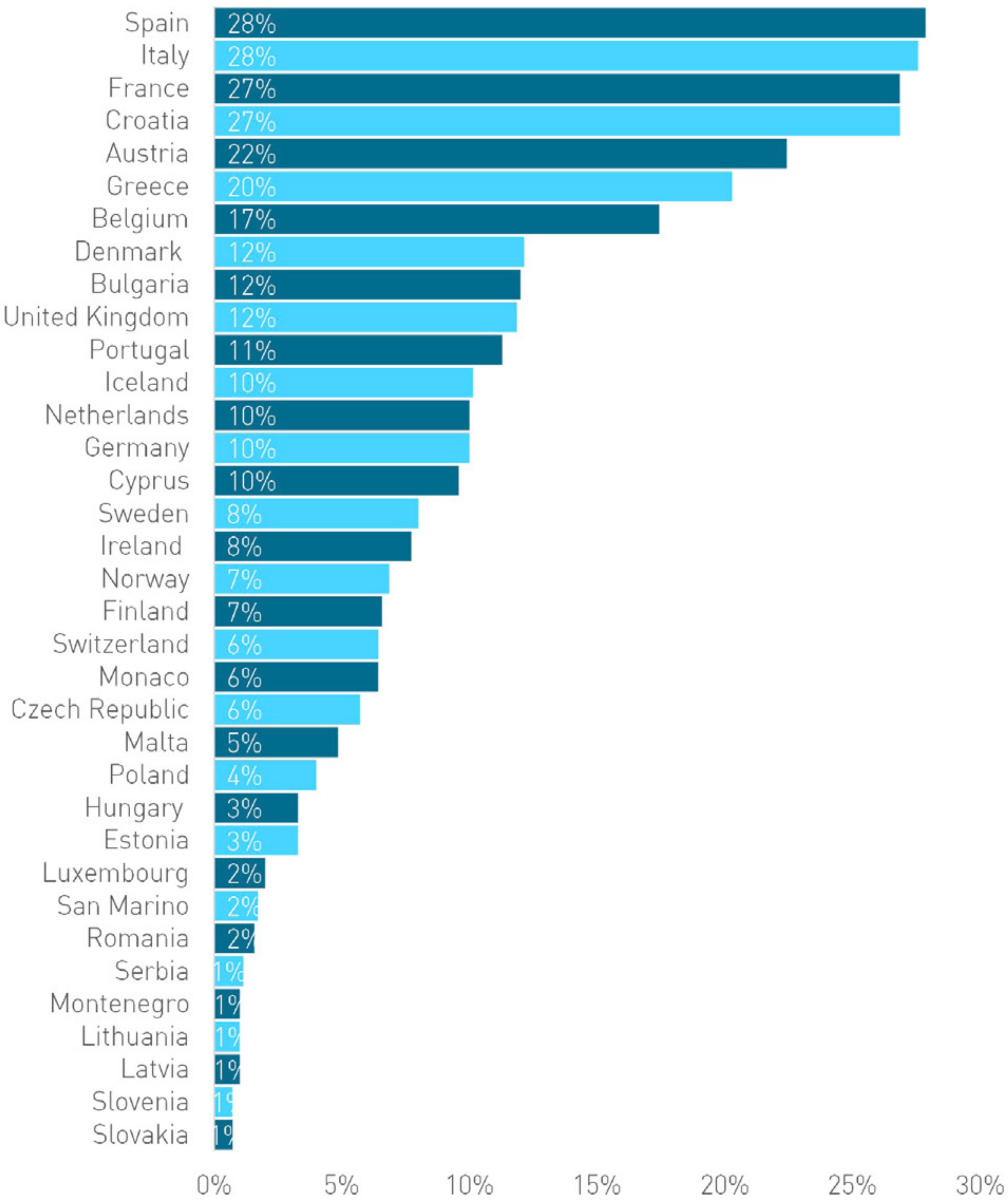
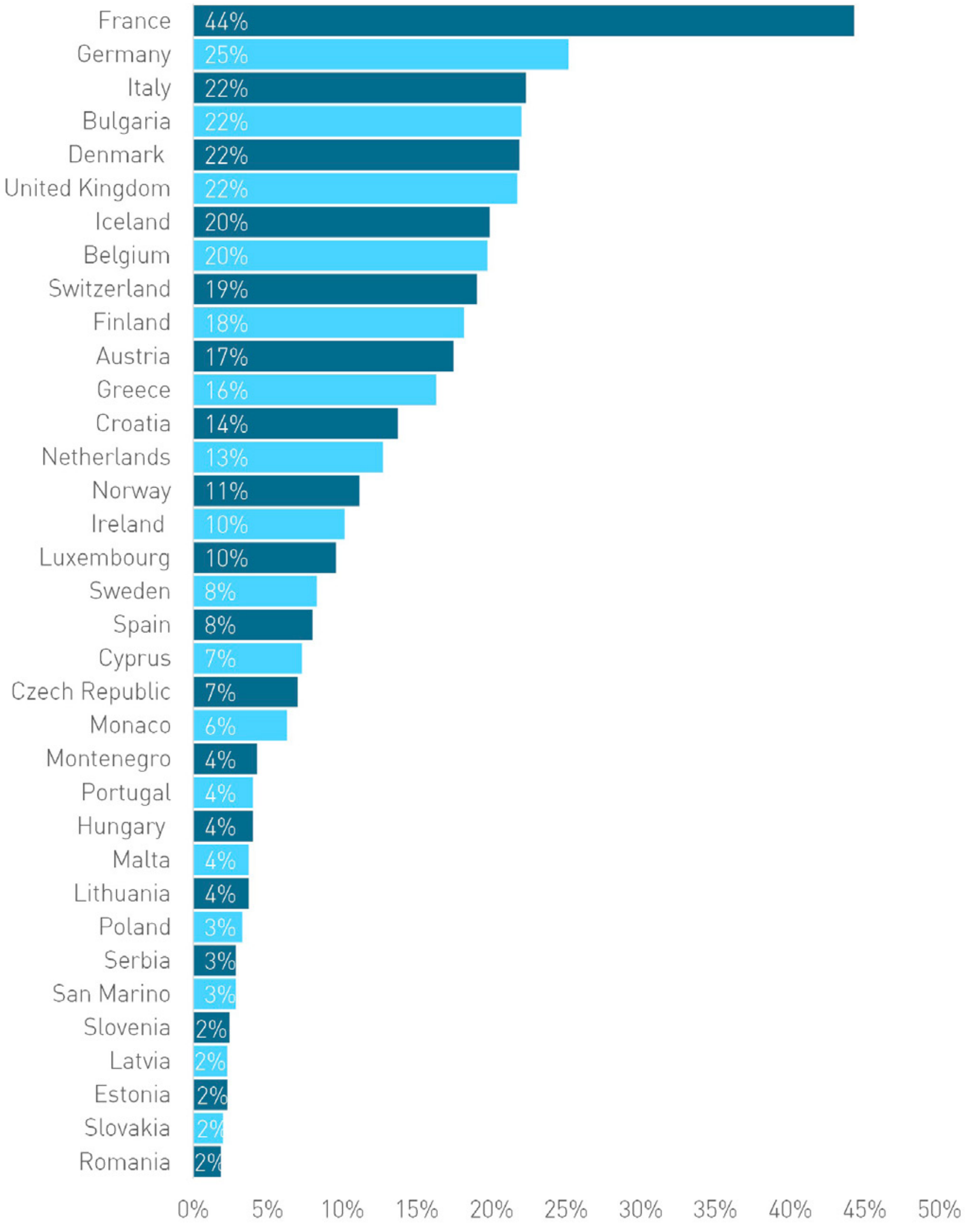


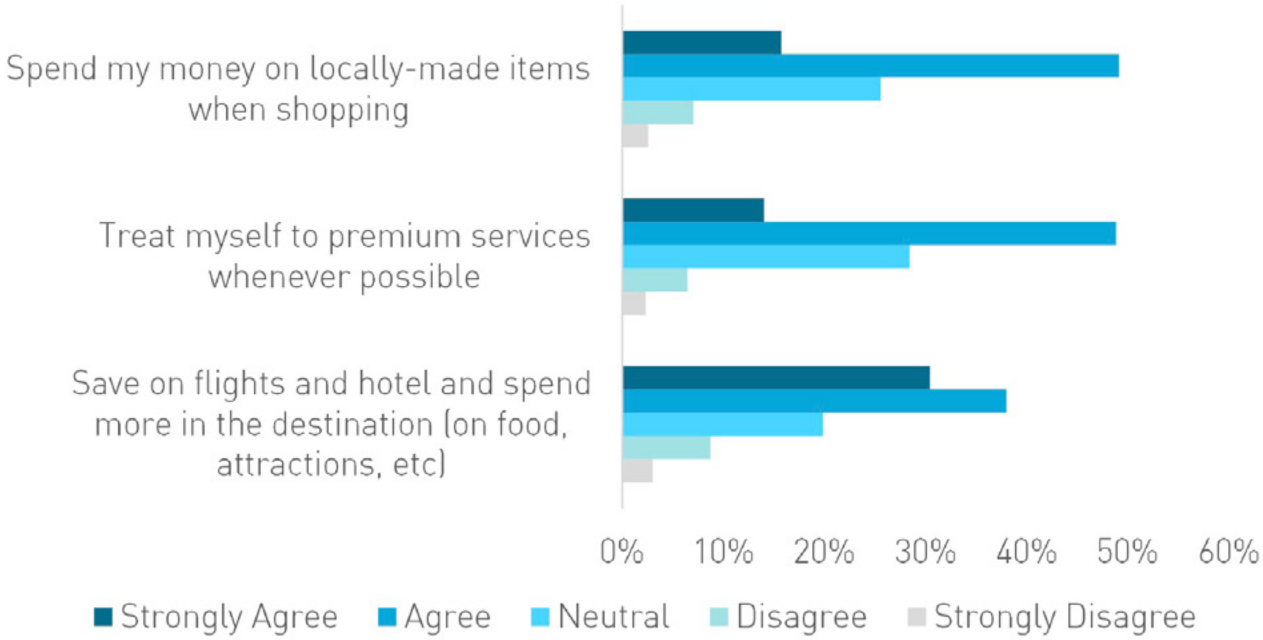
Figure 61: Preferred European destinations for Chinese Gen Z travellers



TRAVEL BUDGETING (CHINA MARKET ONLY)

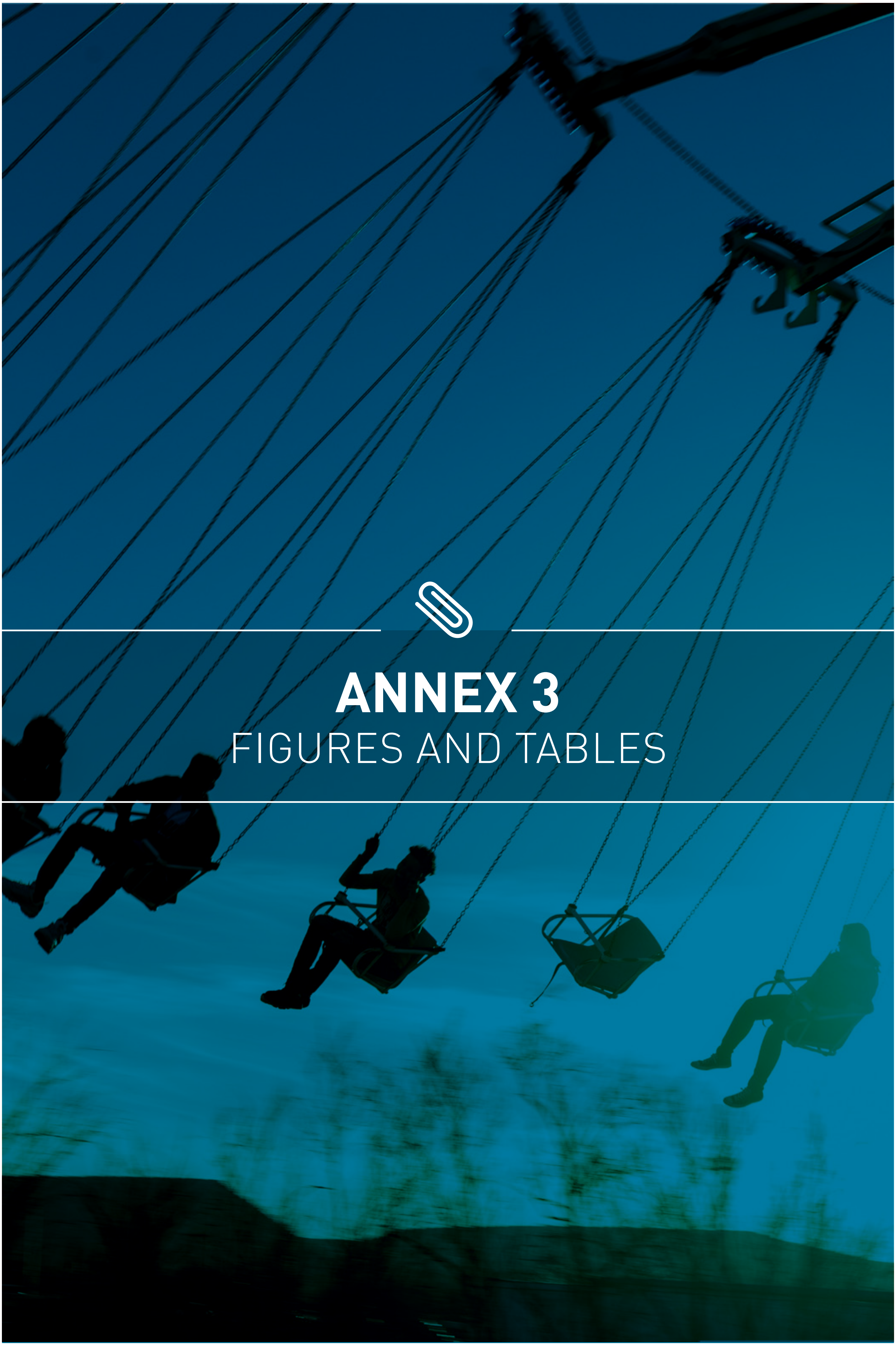
In place of a question relating to contemporary issues, Chinese Gen Zers were asked about their approach to travel spending. The results from this question indicate that spending on shopping in general was preferred over spending on flights and hotels; whether for a premium or locally made items.

Figure 62: Budget priorities of Chinese Gen Zers



This pattern of spending behaviour could possibly be related to Chinese respondents' earlier identified preference for authenticity and experiencing the local environment in their chosen destination. At the same time, the preference for spending more money on experiences shows that Chinese youngsters are cost-driven when purchasing flights or accommodation, while they prioritise in-destination activities, such as spending money on shopping and activities when in-destination.

ANNEX 3
FIGURES AND TABLES



FIGURES

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