



UNDERSTANDING GEN Z TRAVELLERS AND THEIR PREFERENCES IN THE CONTEXT OF COVID-19

LYUBLENA DIMOVA 13TH BALTIC SEA TOURISM FORUM, 10-13 November 2020



EUROPEAN
TRAVEL
COMMISSION

EUROPEAN TRAVEL COMMISSION



MISSION

Strengthen the sustainable development of Europe as a tourist destination and to increase competitiveness, through knowledge gathering and sharing amongst members and lobbying as well as by establishing a professional marketing platform for the successful promotion of member countries in overseas markets.

MEMBERS

33 National Tourism Organisations and
13 Private Organisations (associates)

PARTNERS:

UNWTO, EC, ETOA, WTTC, ACI, etc.

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WHO ARE THEY?

BORN: 1996-2012

CURRENT AGE: 8-24

AGES 8-11 OLDER PRIMARY SCHOOL CHILDREN

AGES 12-17 TEENAGERS, SECONDARY SCHOOL

AGES 18-24 STUDENTS AND YOUNG PROFESSIONALS

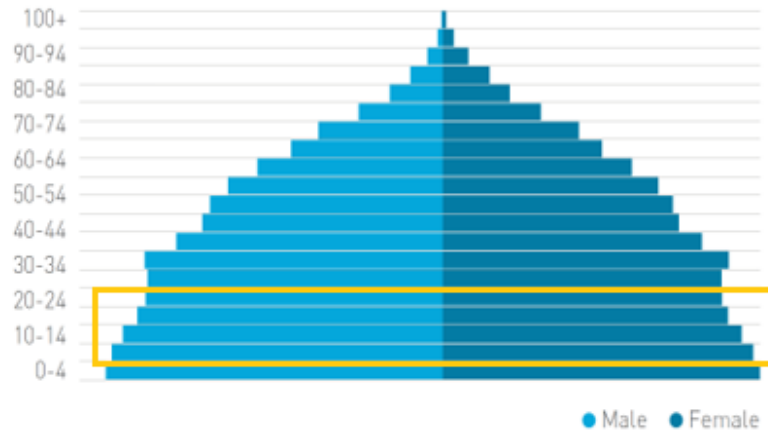


WHY LOOKING AT GENERATION Z?

DEMOGRAPHICS

MOST POPULOUS GENERATION ON THE PLANET

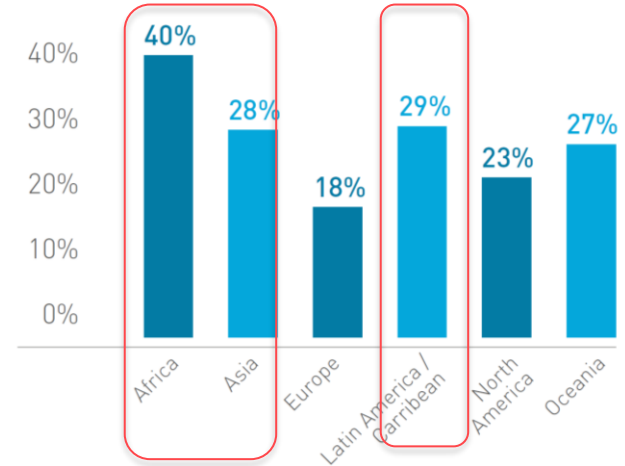
Share of the population of Gen Z by world region



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

DEMAND FROM NEW MARKETS WILL GROW

Share of the population of Gen Z by world region



Source: Ibid United Nations DESA (2020)

WHY LOOKING AT GENERATION Z?

UNIQUE OUTLOOK SHAPED BY....

GLOBALISATION

2008 FINANCIAL CRISIS

THE IPHONE | TERRORISM | CLIMATE CHANGE

DIVERSITY | PERSONAL EMPOWERMENT | ON-DEMAND

LIVE STREAMING | FAKE NEWS | SELF-IMAGE

COLLECTIVISM | MULTIPLE REALITIES | TIK-TOK

EQUAL RIGHTS | PERSONAL HEALTH

GRETA THUNBERG

GEN Z

5 CONSUMER TRENDS TO CONSIDER



CONSUMER TRENDS

CLIMATE CHANGE AND SUSTAINABILITY ARE IMPORTANT FOR GEN Z

Response:

Highlight products and experiences that are kind to the environment and local communities.



CONSUMER TRENDS

GEN Z IS THE MOST DIVERSE AND OPEN GENERATION IN HISTORY

Response:

- Celebrate diversity
- Transmit values, not just attractions.



CONSUMER TRENDS

**THEY CARE STRONGLY
ABOUT PHYSICAL AND
MENTAL HEALTH**

Response:

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



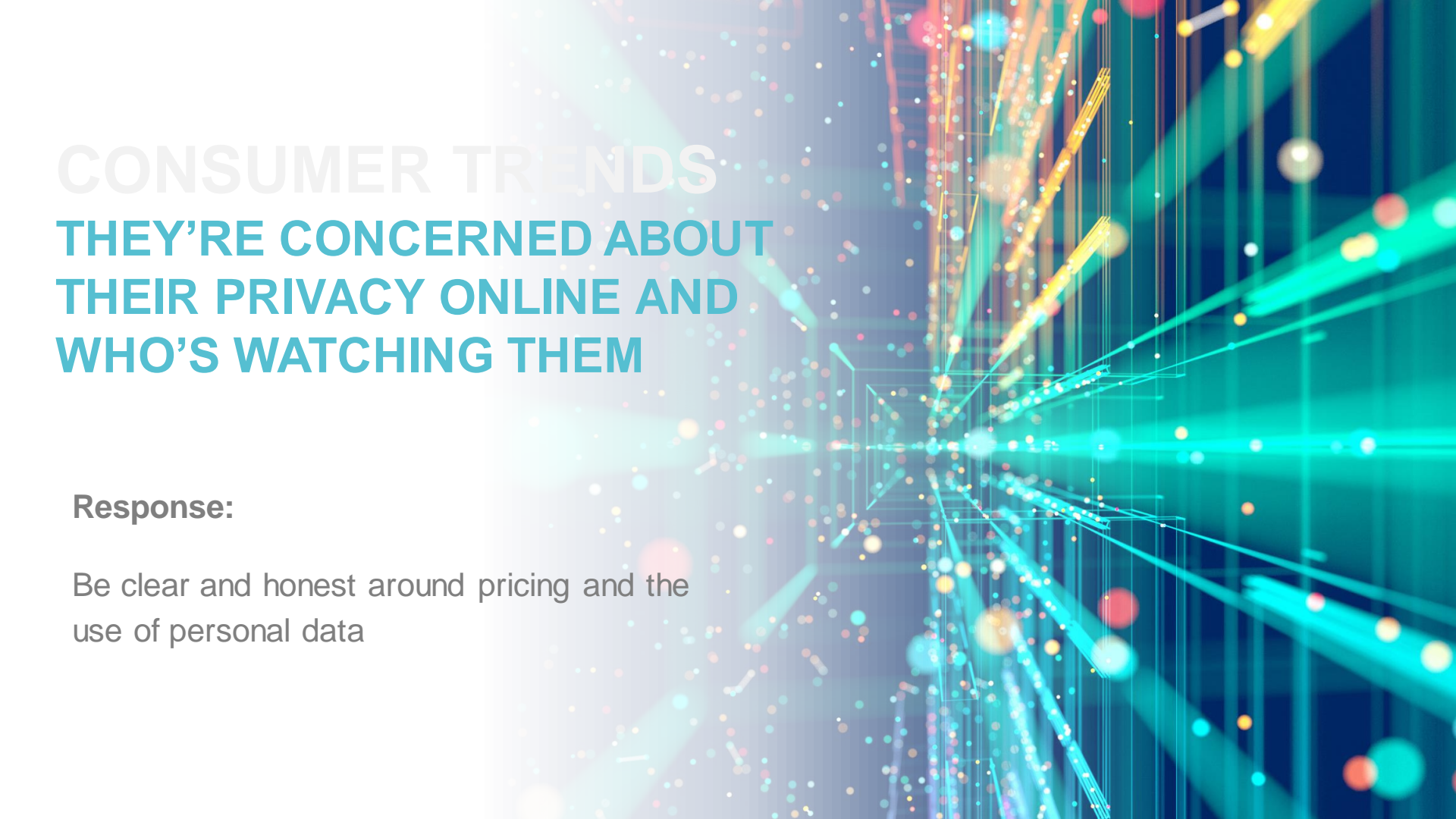
A background image showing three young people sitting outdoors, all focused on their smartphones. A boy in the center wears a grey hoodie, a girl to his right wears a denim jacket and yellow sunglasses, and another person is partially visible in the background wearing a yellow jacket. The scene is brightly lit, suggesting a sunny day.

CONSUMER TRENDS

GEN Z ARE CONSTANTLY CONNECTED AND GET NERVOUS WHEN THEY'RE NOT ONLINE

Response:

- Offline=irrelevant
- Engage with Gen Zers on equal basis

The background of the slide is an abstract digital illustration. It features a dark blue space filled with numerous glowing lines in shades of cyan, green, and yellow. These lines intersect and radiate from various points, creating a sense of depth and movement. Scattered throughout the scene are many small, out-of-focus dots in similar colors, resembling distant stars or data points in a network. The overall effect is a futuristic, high-tech aesthetic.

CONSUMER TRENDS THEY'RE CONCERNED ABOUT THEIR PRIVACY ONLINE AND WHO'S WATCHING THEM

Response:

Be clear and honest around pricing and the use of personal data

GEN Z

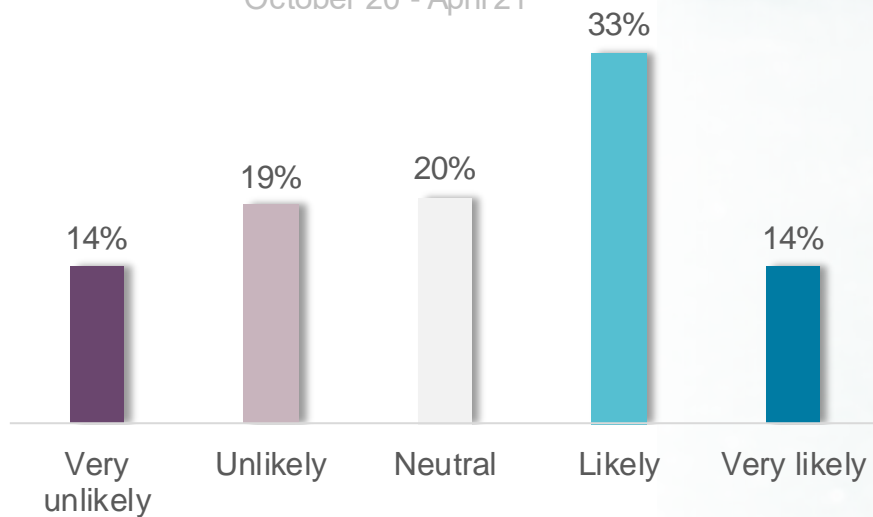
TRAVEL TRENDS IN THE CONTEXT OF COVID-19



UNCERTAINTY ABOUT TRAVELLING IN THE SHORT TERM

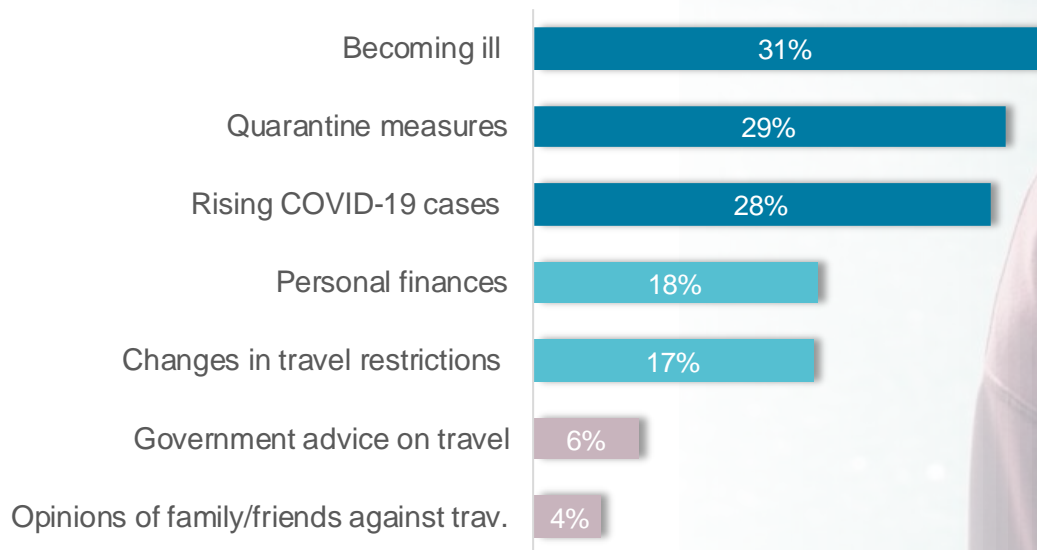
Intention to travel in the next six months

October'20 - April'21



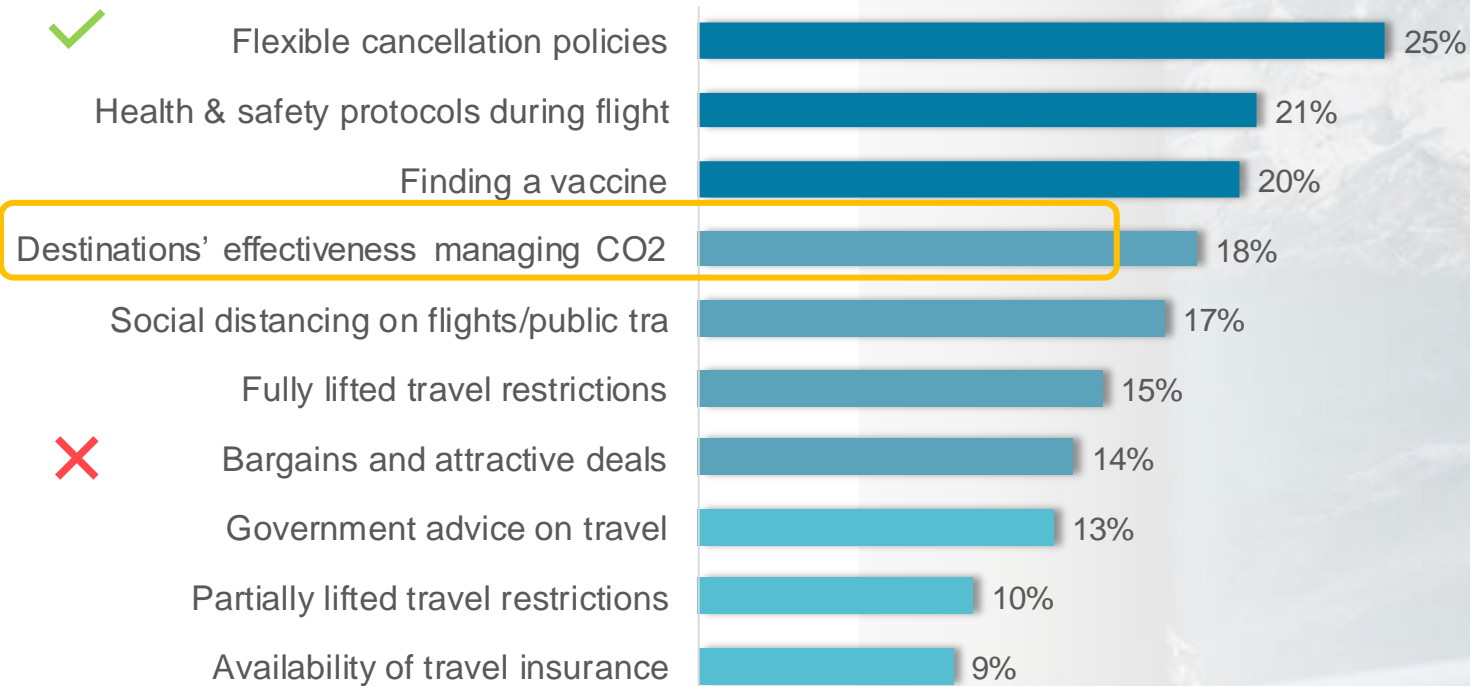
FEAR OF BECOMING ILL AND THE QUARANTINE MEASURES MAIN DETERRENT FOR TRAVEL

Main concerns related to travel in the next months

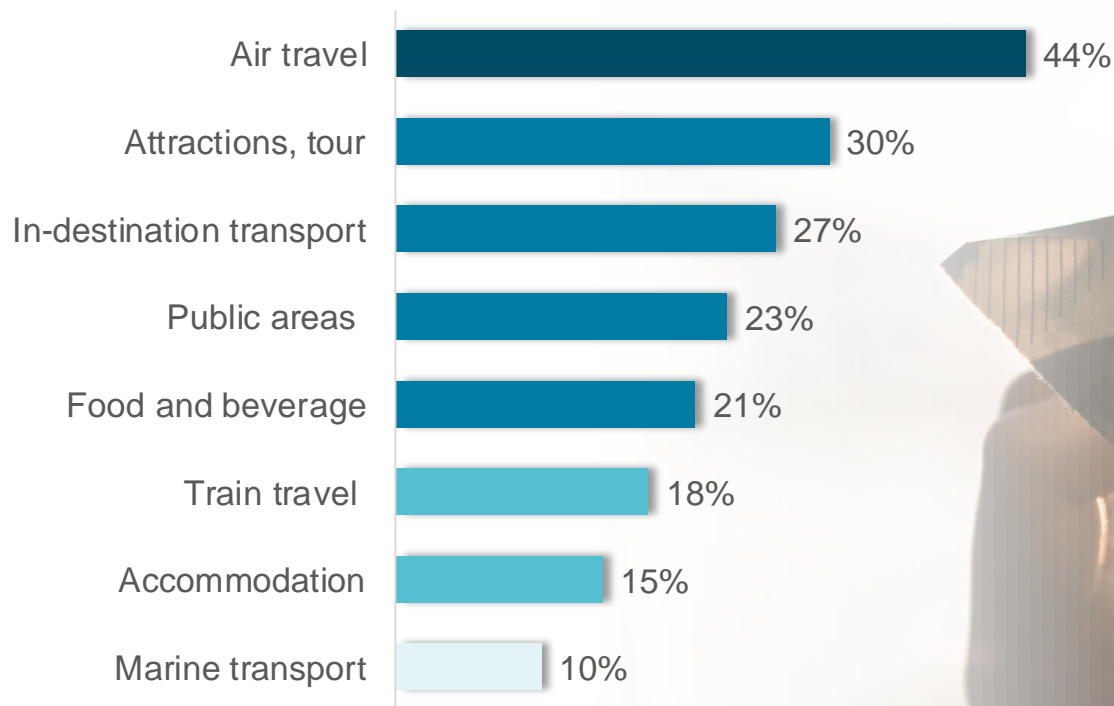


THE FLEXIBLE CANCELLATION POLICIES ARE MOST IMPORTANT FOR Z'ERS NOW

Important factors to travel within Europe now



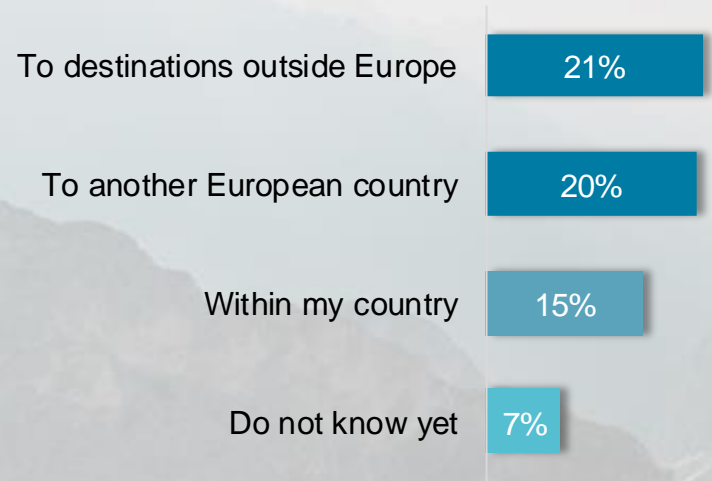
BY A WIDE MARGIN, AIR TRAVEL IS CONSIDERED THE LEAST SAFE PART OF A TRIP, HEALTHWISE



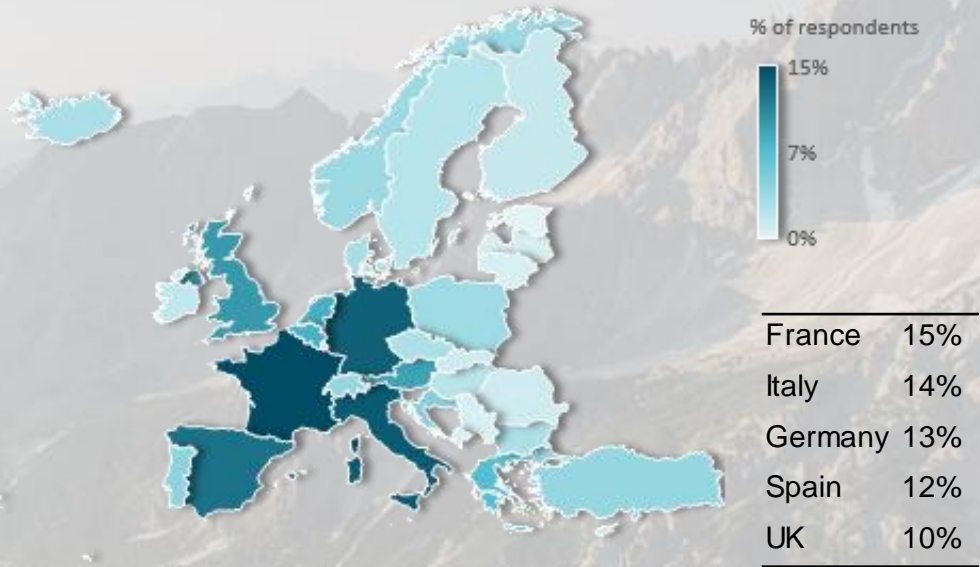
DESIRE FOR INTERNATIONAL TRIPS IS STRONGER THAN FOR DOMESTIC

Where to?

% respondent “very likely” to travel

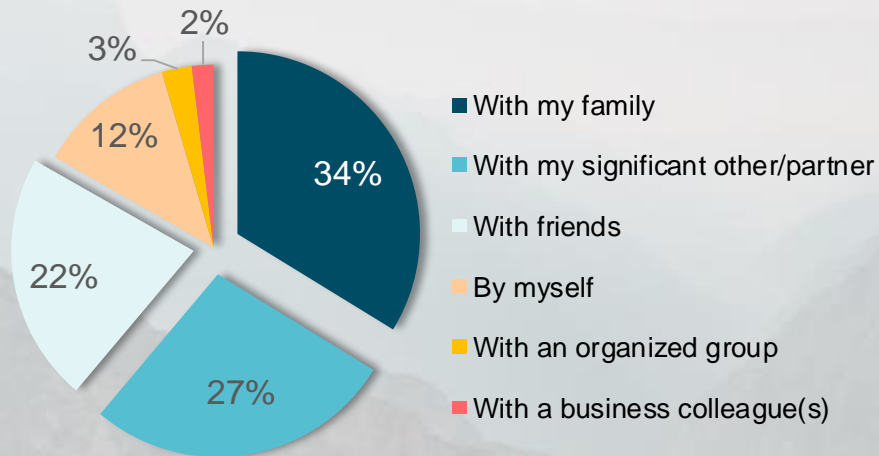


Preferred European destinations



THE MAJORITY OF Z'ERS WITH SHORT-TERM TRAVEL PLANS, INTEND TO TRAVEL EITHER WITH THEIR FAMILY OR PARTNER

Partner to travel with

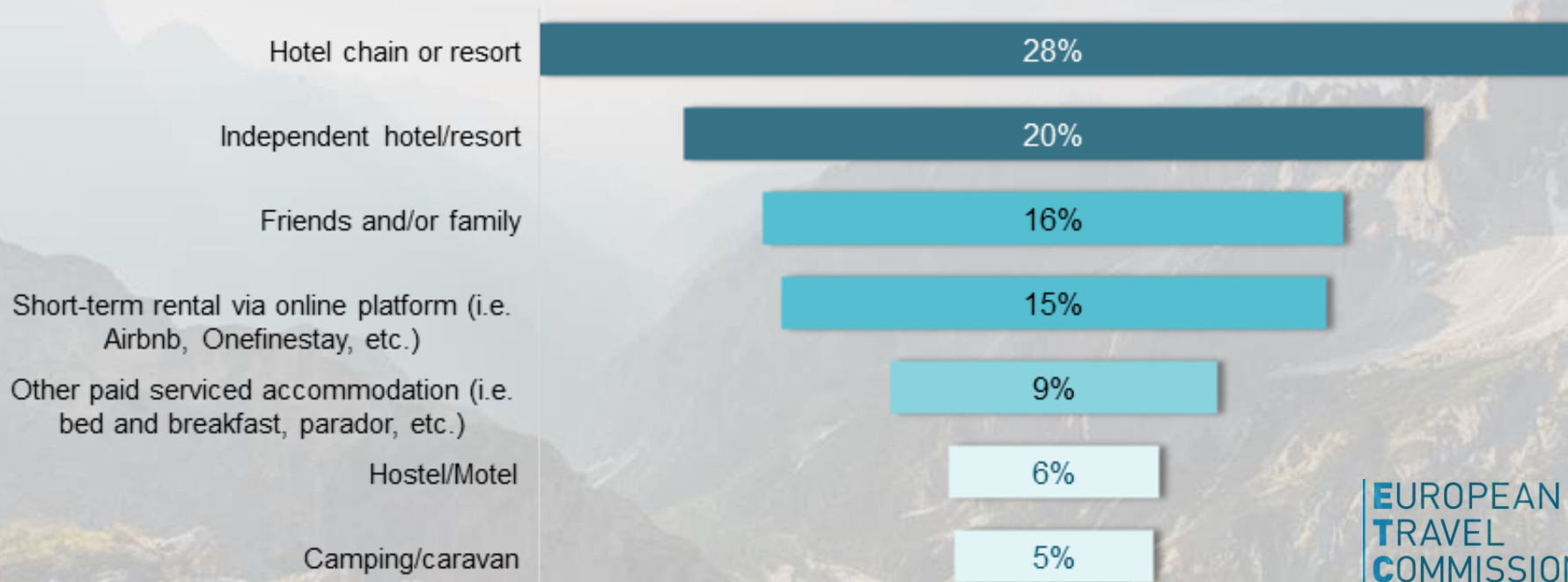


Desired type of trip



HOTEL OR RESORT CHAINS ARE THE TOP CHOICE OF ACCOMMODATION

Preferred type of accommodation for the next trip



ETC MARKET STUDY



**STUDY ON GENERATION Z
TRAVELLERS**

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**THANK YOU VERY MUCH FOR
YOUR ATTENTION!**

WE ARE GLAD TO SHARE WITH YOU

[The ETC Study on Gen Z Travellers](#)

[ETC Infographic on Gen Z Travellers](#)



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