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The Gen Z Travel Blueprint:
What Gen Z Really Wants When Trip Planning

BACKGROUND

Gen Z is the second youngest generation next to millennials (Gen Y), born between the mid-1990s and early 2000s. In 2019, the US Census International Data estimated that by 2020, Gen Z would account for 40% of the population in the US, Europe, and the BRIC countries and about 10% in the rest of the world. This generation is said to become the most dynamic participant in the retail sector in the next five to ten years.

They are the first generation to have access to the internet and portable digital technology from an early age. Therefore, Gen Z is known to use technology in most activities, always looking for the most up-to-date information to make purchasing decisions. These individuals see travel as a tool that can enrich them and affect their lives and identities. They are fascinated with discovering various cultures and being in contact with other realities.

According to the article "Tourism Industry Management In The Global Transformation: Meeting The Needs Of Generation Z," written in 2021, if tourism management wants to cater to Gen Z, they should do the following:

- Appeal to the intellect
- Promise a broadened worldview
- Highlight tolerance of diverse cultures, religions, and traditions
- Emphasize the beauty of the surrounding world, development of communication skills, self-discipline, and adaptation to modern life conditions
- Position travel habits in the context of 'active leisure.'

RESEARCH GOAL

This study focuses on regional differences between Gen Zers in the US and Europe and how their distinctive features affect trip-planning behaviors and expectations.

Goal: *Discover user experience opportunities for travel companies to target US and EU Gen Zs and influence their decision to use a particular digital good or service.*

The deliverables expected from the study were user personas and experience maps to represent Gen Z travelers from the US and Europe, and find answers to the following questions:
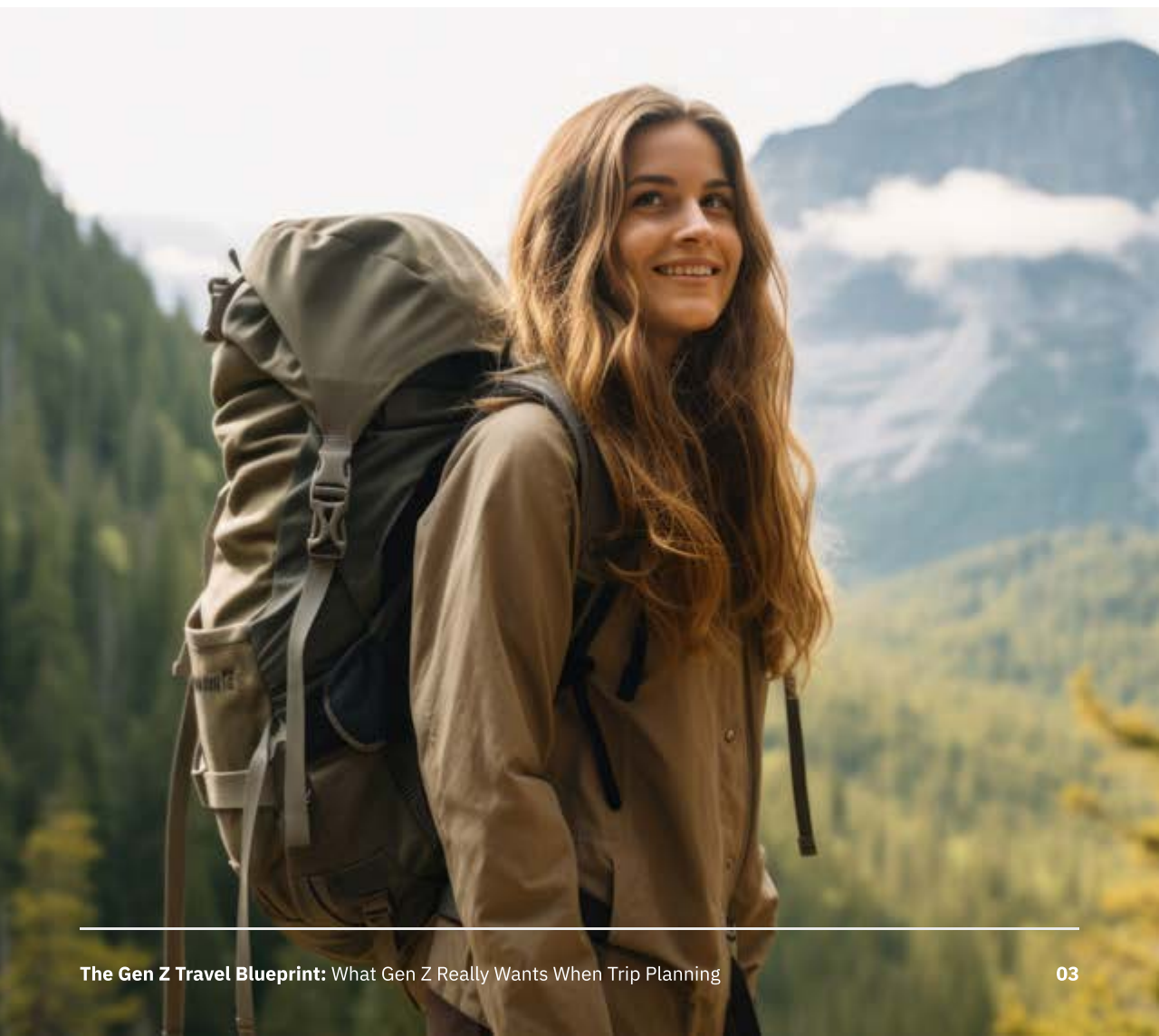
- What are the top five destinations they plan to visit next year?
- What are the top five tools they use to plan a trip?
- What are the highlights and pain points they experience when planning a trip?
- What digital functionalities, tools, or features would be valuable for them to have for their next trip?
- What are the key differences in attitudes toward planning a trip?

RESEARCH METHOD

For this study, we started with a round of unmoderated interviews to retrieve qualitative data. The resulting survey consisted of 17 open-ended questions, shared with 10 participants—five from the EU and five from the USA—between the ages of 21 and 26 who had traveled at least twice in 2023.

The results obtained from this initial research served as a baseline for the options that would show responses to multiple-choice questions for the remaining 40 participants in the quantitative survey. In the quantitative survey, we asked a series of multiple-choice, single-choice, and a couple of open-ended questions. We also asked participants to rate the usefulness of certain features and frustration levels of several pain points previously identified in the qualitative survey.

Finally, we asked participants to sort the different steps of planning a trip from the most exciting to the most stressful in a card-sorting exercise. This survey was also divided into USA participants (ten women and ten men) and European participants (ten women and ten men).

DELIVERABLES →

1

What are the top five destinations they plan to visit next year?

For the first research question, we wanted to identify the top five destinations that Gen Zs plan to visit next year, and the results did vary from region to region. 50% of the 40 participants interviewed said they would like to travel to the South of Europe, 40% to Western Europe, 30% to the USA, 28% to Northern Europe, and 25% to Eastern Europe. The participants could select multiple destinations and were shown a list of countries in these regions.

2

What are the top five tools they use to plan a trip?

In this second question, the survey also allowed for multiple selections and the option to add more tools if needed. The results showed that 65% of the 40 participants interviewed use Google Search Engine to plan their trips, 60% use Booking.com, 58% use Airbnb, 53% use Google Maps, and 40% use Google Flights.

Google   Booking.com   Google Maps   airbnb   Google Flights

3

What are the highlights and pain points they experience when planning a trip?

The most frequently reported highlights are having new experiences, meeting new people, and visiting new places. According to participants, one of the most fun aspects of arranging a vacation is choosing the location and making the itinerary. One of the most common problems or frustrations when booking accommodation or transportation is setting a budget and keeping to it.

Participants also really dread having to figure out the difficulties of organizing a trip with a group or trying to figure out the logistics with dates, distances, and costs. Another drawback stated is switching between tabs and needing all the information in one location.

4

What digital functionalities, tools, or features would be valuable for them to have for their next trip?

The response to this last research question is divided into two major sections: Existing Features (already used by the participants as current trip planning tools) and New Product Ideas or Features (proposed by the participants as features that could potentially help them through the process of planning trips if they existed in the future).

For the existing features, 90% of the participants find "Preview and Compare Prices" in their current tools useful. 90% also find selecting or searching for options with "Flexible Dates" helpful. The last feature is the "Review & Compare Options," which allows users to explore specific criteria and review all the possibilities before selecting the best option. This feature was voted "useful" by 78% of participants.

As for the New Product Ideas and Features, 78% of the participants in the study said that the ability to enter travel details like dates, destinations, budget, etc., and having the platform provide a list of suggestions was immensely helpful. 78% of the participants also said sharing the trip plan with others for their review and confirmation was helpful.

EUROPEAN USER PERSONA

THE EUROPEAN LEARNER

" My main motivation to travel is to try and see the most and do the most before dying, remaining curious about life and other cultures.

I enjoy meeting new people and seeing a lot of different places, I want to be able to enjoy as many different cultures as possible, and I want to be able to escape from everyday life when possible. "

KEYWORDS
DISCOVER   EXPERIENCE   CULTURE

PSYCHOGRAPHICS
- 50% are students
- 60% consider the process of planning quite stressful and overwhelming
- 80% want to learn about the culture and history
- 85% want to gather new experiences and explore

HIGHLIGHTS
- 55% Enjoy planning trips
- Favorite part of the process is Selecting a Destination
- Second favorite is Creating Itineraries

TOOLS
- 85% use Booking.com
- 70% use Airbnb
- 70% use Google Maps
- 65% use Google search engine
- 45% use SkyScanner

INSPIRATIONS
- 60% use:
  1. Instagram
  2. YouTube
  3. TikTok
- 40% don't use social media as inspiration for travel destination

SOFIA MÜLLER
21
FEMALE
STUDENT
BERLIN, GERMANY

DESTINATIONS
Southern Europe — 55%
Western Europe — 35%
Eastern Europe — 35%

TRAVEL DETAIL
Lots of Detail — 10%
Mid Detail — 65%
No Detail — 25%

EFFORT & TIME PLANNING A TRIP
Lots of Effort — 65%
Mid Effort — 20%
Low Effort — 15%

TRAVEL ACCOMPANIMENT
Group Travel — 40%
Solo Travel — 10%
Either Way — 40%

ACCOMMODATION
Airbnb — 45%
Hotels — 35%
Hostel — 15%

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Based on the results obtained from the study, the user persona designed for European Gen Zs is called "The European Learner." This is because European participants prioritize traveling for educational purposes like learning a new language, culture, or the history of their travel destination. This type of persona repeatedly mentioned the keywords "discover," "experience," and "culture."

As for psychographics, 50% of European Gen Zs are students, and although 55% mention they enjoy the process of planning trips, 60% consider it quite stressful and overwhelming.

For the European learner, the favorite part of planning a trip is selecting a destination and creating an itinerary. 60% mentioned they use social media like Instagram, YouTube, and TikTok as inspiration to find that destination. The remaining 40% do not use social media but use other means like talking to friends or family.

55% chose Southern Europe, 35% Western Europe, and 35% Eastern Europe as their next travel locations. Skyscanner, Booking.com, Airbnb, Google Maps, and Google are the most popular tools. Europeans are most likely to use Booking.com to identify Airbnb apartments, hotels, and hostels because 45% of participants said they stay in Airbnb locations, compared to 35% who stay in hotels and 15% who stay in hostels.

Regarding their preferences for trip planning, we see that 65% of Europeans prefer to have a mid-level detail, which means they book essentials like transportation and accommodation, a list of places they would like to visit or things they would like to do during the trip, but do not make a strict schedule and instead leave room for some spontaneity. 40% enjoy traveling in groups, while another 40% enjoy traveling alone or in groups. 65% note that preparing for trips takes a lot of time and work.

EUROPEAN EXPERIENCE MAP
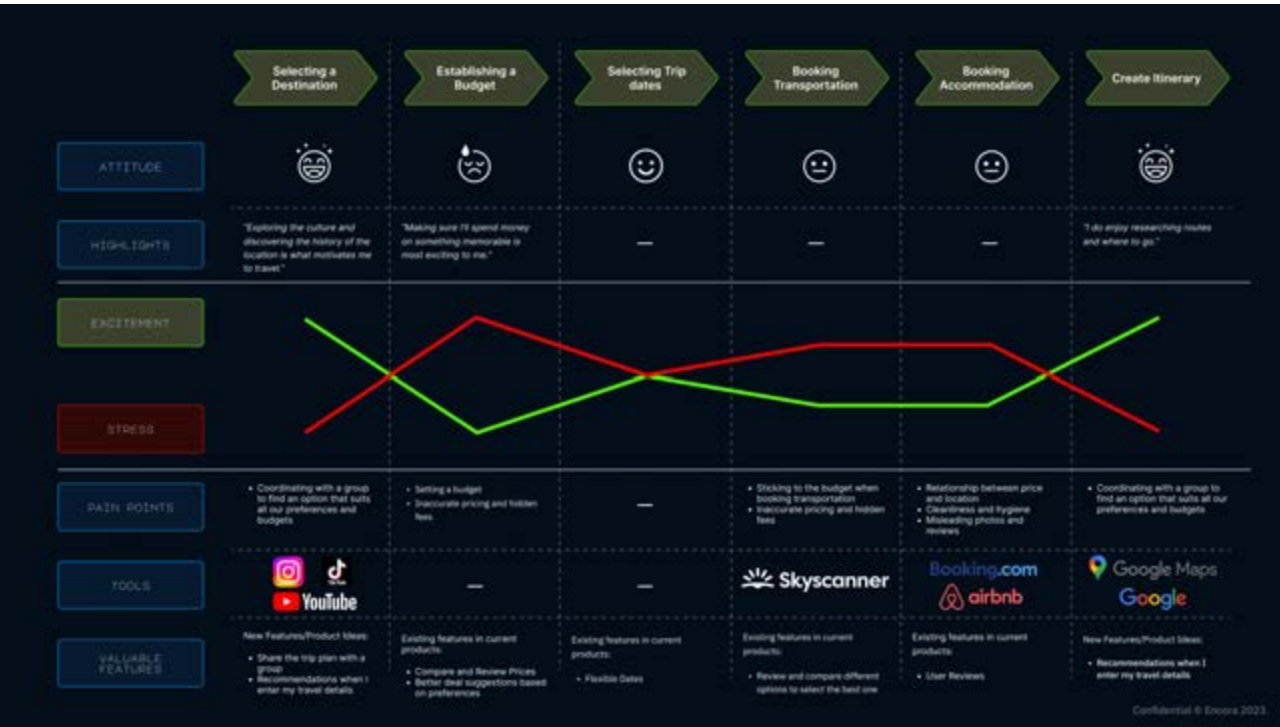
The European Learner, when making travel plans, is depicted in the previous map.
The general stages of trip planning can vary depending on the specifics of the situation, but they typically include these six steps in the following order:

- Selecting a destination
- Establishing a budget
- Determining the trip dates and duration
- Booking transportation
- Booking accommodation
- Creating an itinerary

Here, we can see how attitudes, highlights, pain points, excitement and stress levels, tools, and valuable features vary from stage to stage.

In the initial stage of selecting a destination, excitement is at its highest, and stress is at its lowest. Although the participants say it is their favorite part of planning a trip, coordinating with a group may be difficult.

Instagram, TikTok, and YouTube are the tools utilized at this stage, and the most helpful feature would be a new product idea that allows you to input your travel information and have a system that provides suggestions for each step of the trip-planning process.

Next, when establishing a budget, excitement drops, and stress is at its highest. Sticking to the budget and handling inaccurate pricing due to hidden fees are among the most common pain points. The most valuable features of the current tools include comparing and reviewing prices and offering better deal suggestions based on user preferences.

Choosing dates and determining the trip duration constitute routine aspects of the process, requiring no additional tools or features beyond the flexibility to select available dates. Attitudes, excitement, and stress are neutral at this stage.

When booking transportation and accommodation, stress levels are slightly higher, and excitement levels are lower. The tools used are Skyscanner, Booking.com, and Airbnb, respectively. Frequently encountered challenges include adhering to budget constraints, grappling with inaccuracies in pricing owing to concealed fees during transportation booking, navigating the delicate balance between price and location in accommodation choices, addressing concerns related to cleanliness and hygiene, and contending with potentially misleading photos and reviews associated with these locations.

Finally, creating an itinerary is the second most exciting part of the process; therefore, the stress levels drop again. Participants enjoy researching the routes they will take on these trips but consider coordinating with a group a pain point. The top tools used here are Google and Google Maps, where a new product or feature that can give trip suggestions based on a prompt with travel details and requirements would be advantageous.

THE USA USER PERSONA
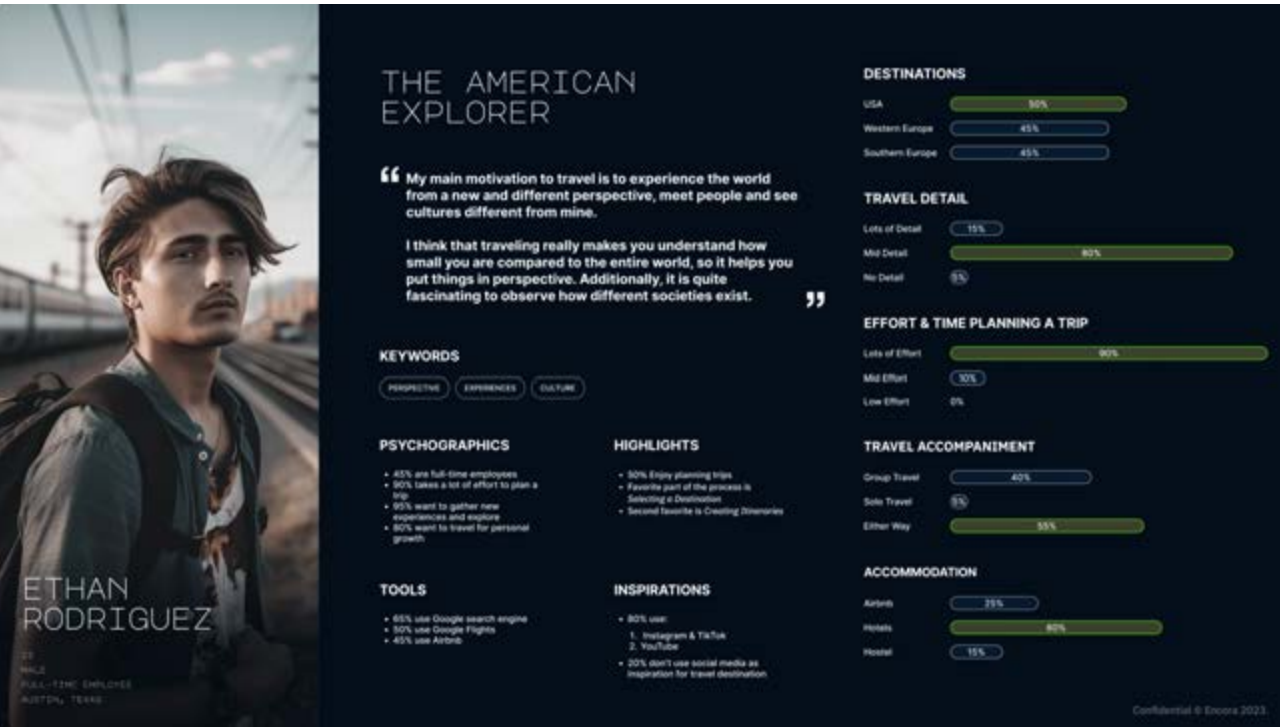
The user persona designed for the American Gen Z based on the results obtained from the study is called "The American Explorer." US participants are more likely to mention traveling in the context of gathering new experiences, like interacting with new people or visiting unfamiliar places. This type of persona repeatedly used the keywords "perspective," "experience," and "culture."

As for psychographics, 45% of US Gen Zs are full-time employees, and although 60% mention they enjoy the process of planning trips, 90% consider it takes plenty of time and effort to do so. The American Explorer's favorite part of planning a journey is selecting a destination and creating an itinerary, and 80% mention they use social media like Instagram, TikTok, and YouTube as inspiration to find that destination; the remaining 20% do not use social media for this, and instead, select a destination by other means like talking to friends or family.

We find that 50% prefer traveling within the US, 45% to Western Europe, and another 45% to Southern Europe. The most popular tools are Google, Google Flights, and Airbnb. Americans use Airbnb to book hotels since 60% of them mentioned they stay in hotels compared to the 25% who stay in Airbnb apartments and 15% who stayed in hostels.

Regarding their preferences for trip planning, we can see that 80% of Americans prefer to have a mid-level detail, which means they book all the essentials like the transportation and accommodation and perhaps a list of places they'd like to visit or things they would like to do during the trip without a strict schedule to allow for some spontaneity. 55% enjoy traveling in groups or by themselves, while 40% prefer traveling in groups.

USA EXPERIENCE MAP
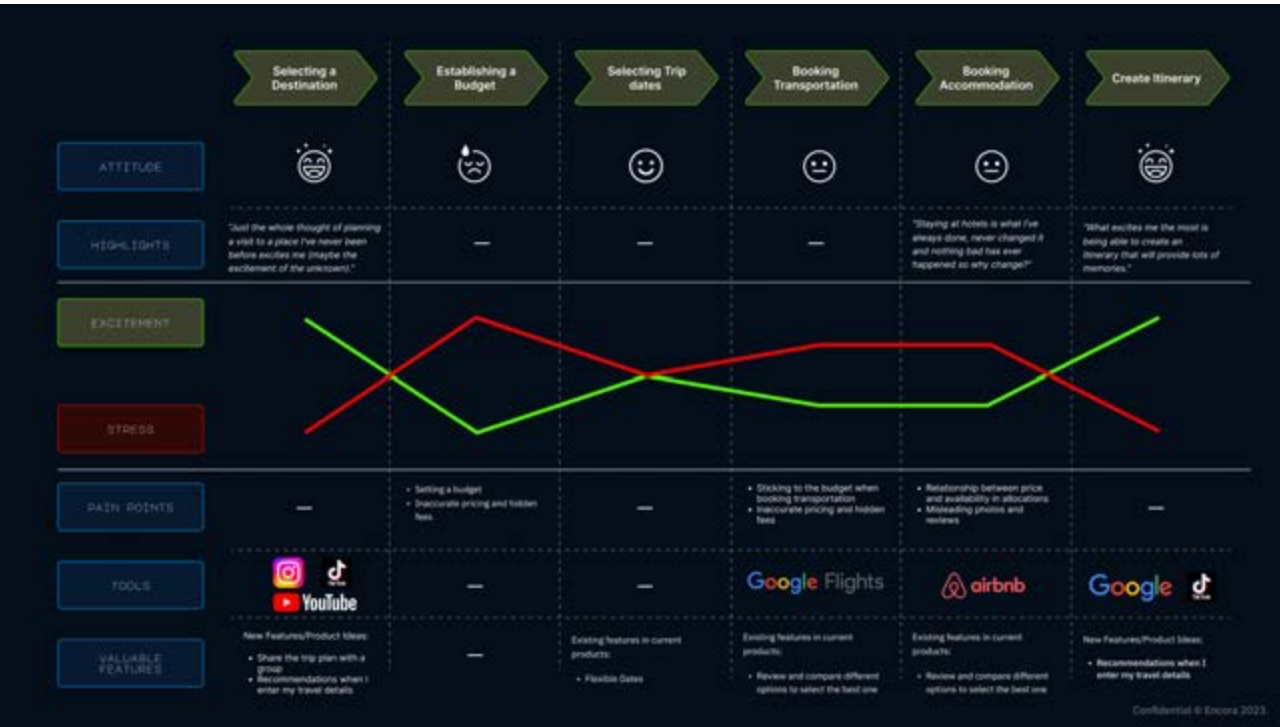
Overall, the experience while planning a trip looks remarkably similar between the two personas. The attitudes present are the same for each stage, and the excitement and stress levels look like the European map.

Instagram, TikTok, and YouTube are the most used tools when selecting a destination. The most helpful feature would be a new product idea that allows one to input travel information and have the system provide suggestions for each step of the trip. Another helpful feature would be the ability to share the trip details with a group for review and confirmation.

The most common pain points are establishing a budget, sticking to the budget, and grappling with inaccurate pricing due to hidden fees. As mentioned in the previous experience map, selecting the dates and trip duration are standard parts of the process where no tools or features are needed other than the option to choose flexible dates in the current tools.

Next, Google Flights and Airbnb are the most used tools when booking transportation and accommodation, respectively. The common pain points mentioned are sticking to the budget and inaccurate pricing due to hidden fees when booking transport and the relationship between price and availability of accommodation, as well as misleading photos and reviews in these locations. As for the most valuable features in this stage, we can find the option to review and compare different alternatives to select the best one among existing tools.

When creating an itinerary, Google and TikTok are among the most used tools, where a new product or feature that can give trip suggestions based on a prompt with travel details and requirements would be especially useful as well.

CONCLUSION

In conclusion, there are key distinctives between USA and European Gen Z travelers when it comes to their trip planning behaviors and attitudes. The most significant ones are the following:

- 90% of USA participants spend a large amount of time and effort planning a trip compared to 60% of Europeans.
- 40% of Europeans do not use social media as inspiration to choose a destination as compared to 20% of US participants.
- Europeans tend to travel more for educational purposes than US Gen Zs who travel more for new experiences.
- Europeans are more concerned with the hygiene and cleanliness of a location than US travelers.
- 50% of European Gen Zers are students compared to 45% of US Gen Zers that are full-time employees.

Gen Z is reshaping the travel industry with unique behaviors, preferences, and values. Their love for immersive experiences, desire for authenticity, and reliance on technology have transformed how travel businesses operate. To remain relevant and competitive in this evolving landscape, stakeholders in the travel industry must adapt and cater to the specific needs and expectations of Gen Z travelers.

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