YouGov®

TRAVEL & TOURISM REPORT 2022

Youth of today, travel of tomorrow

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Inside

Introduction

As the world reopens after two years of forced stillness, the appetite for travel is rising globally. Travel marketers are now called to maximize their conversions and make up for lost time during the pandemic, focusing on adult travelers who are looking to purchase trips and accommodation in the next few months.

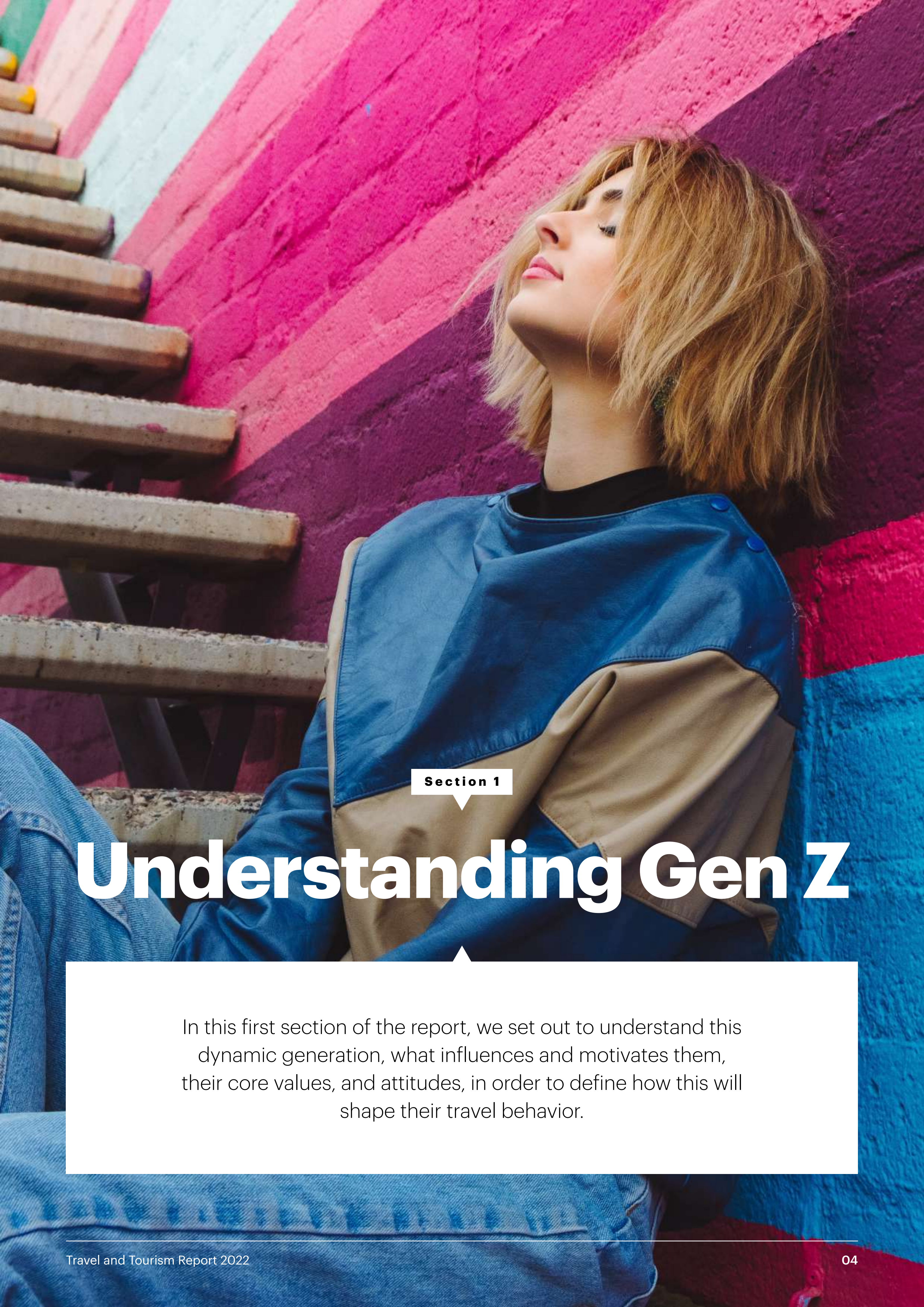
However, a great opportunity lies ahead, with May data showing that since October 2020 propensity to travel in the next 12 months is at its highest among the younger generation of 18-24 years old. This cohort, (we refer to as Gen Z in this paper), is made of young people who will make the big transition between student life and financial independence in the next few years.

Gen Zs are projected to account for 34% of the US workforce by 2030*, (40% of the consumer market in the US) and they are the first digital natives, where physical and digital life have always coexisted. This generation will form its attitudes towards travel in the next few years, and it is incredibly important for marketers to get to know, and monitor their travel preferences as they work on their planning; the positive associations their brands will be able to create today, will result in building engagement, trust and purchase in years to come.

This YouGov report sets out to understand Gen Zs globally, explore what's important to them and what makes them tick, reveal what Gen Zs want from travel, and identify the best way to connect and engage with this future generation of travelers.

LEARN MORE ABOUT OUR DATA

* Source: https://truelist.co/blog/generation-z-statistics/



Section 1

Understanding Gen Z

In this first section of the report, we set out to understand this dynamic generation, what influences and motivates them, their core values, and attitudes, in order to define how this will shape their travel behavior.

Gen Z, the future beacons of travel

Gen Z represent just over a quarter of the world population, accounting for **2 billion** Gen Zs worldwide. Representing a sizeable proportion of the world's population and the future workforce, they will shape the travel of tomorrow. Therefore, understanding Gen Z travelers' concerns and motivations will be important in helping destination and travel brands better connect with this desirable cohort and identify how these attitudes and behaviors will mold the global travel sector.

Embarking on new life experiences

Gen Z will encounter a number of important milestones in their lives that will shape them into the people they are, embracing key life changing events that will guide them on the road to discovering themselves and their future aspirations. In these formative years, they will grow as individuals as they embrace significant changes such as leaving school, leaving home for the first time to start university, graduate from university, and starting on their future career path. As shown using YouGov Global Profiles (covering over **40** countries) highlighting the significant events that have happened to 18–24-year-olds in the last 12 months. With the world at their fingertips, they will shape their own identity and opinions both online and offline, what is important to them will emerge and their values will start to form.

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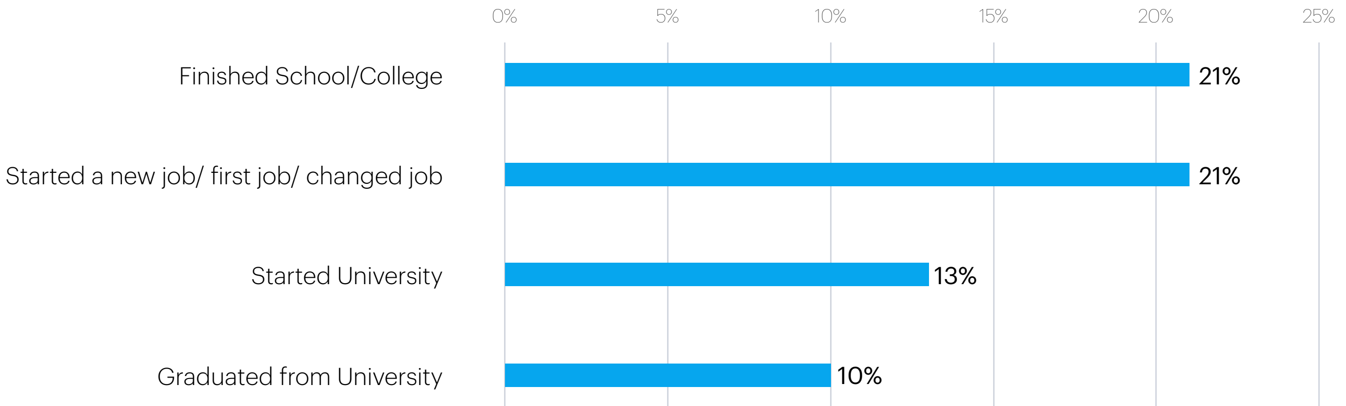
Top life events that have happened to Gen Zs (Global)

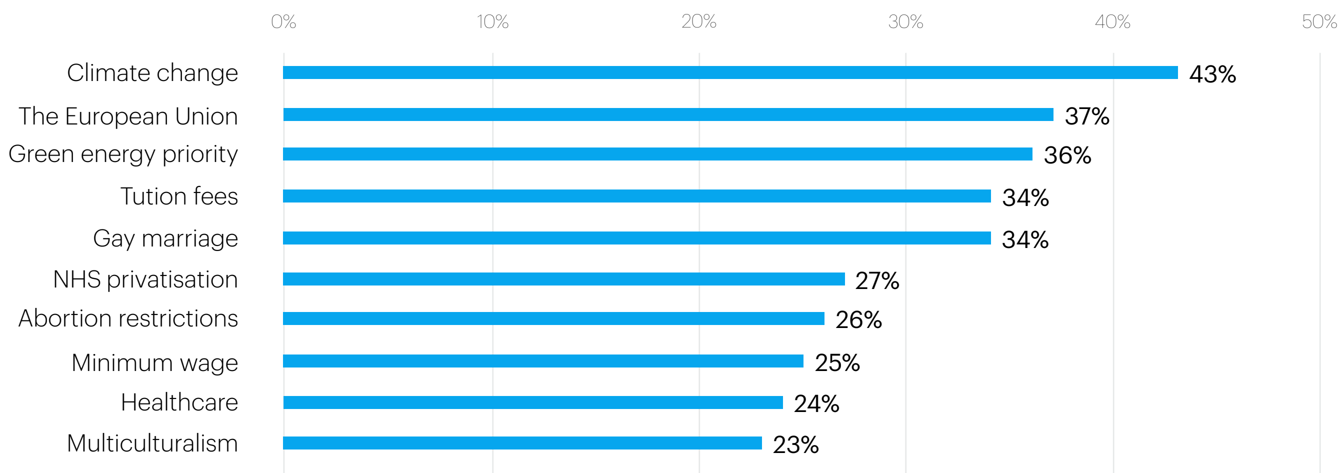


Q: Which, if any, of the following have happened in the last 12 months? YouGov Global Profiles March '22

What matters to them?

Gen Z have grown up with a heightened awareness of global issues such as global warming, climate change and their own impact on the environment influencing their outlook on life. In addition, with well known global figures such as Greta Thunberg and the array of natural disasters that they have witnessed across the world, it is not surprising that climate change ranks as the top issue of concern for 18–24-year-olds in Great Britain with green energy the third top issue of concern. Moreover, British Gen Zs have strong values around the areas of Diversity, Equality and Inclusion striving for equal rights for same sex marriage, with a third stating this as an important issue (**34%**).

Top issues concerning 18-24 years olds (GB)

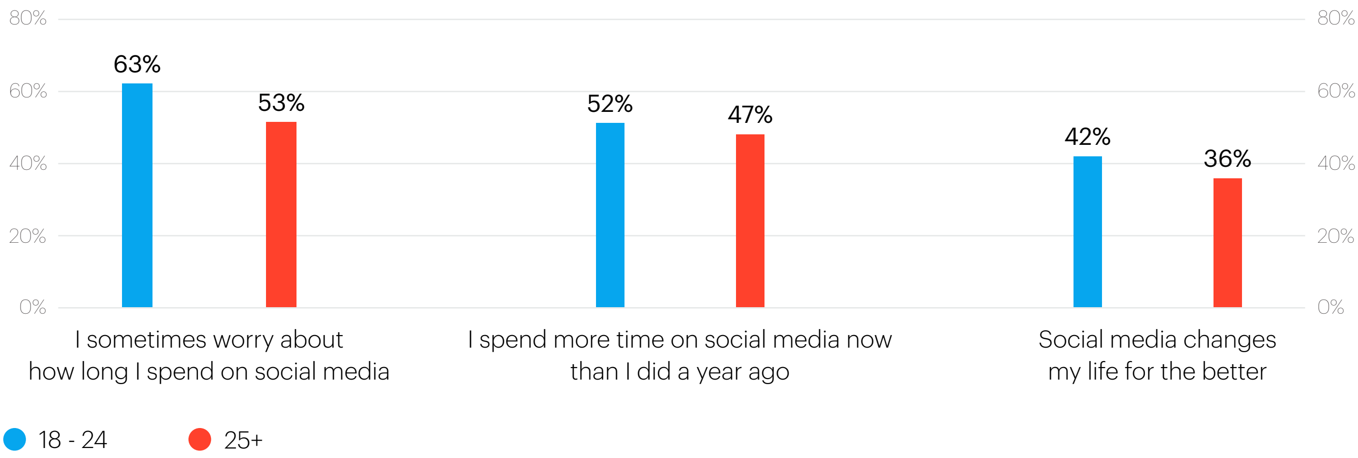


Q: Top issues that are important, YouGov UK Profiles April '22

Digital natives

Gen Z is the first generation to have 24/7 access to the internet, connected devices, and social media since birth. As a result, they see the physical and digital worlds as a seamless continuum of experiences that blend offline and online information for entertainment, commerce, and communication, making them true digital natives. YouGov Global Profiles data across **43** markets reveals the key role social media plays in their lives. Almost two thirds of global Gen Zs sometimes worry about how long they spend on social media (**63%**) and just over half agree they are spending more time on social media than they were a year ago. Despite being concerned about the amount of time they commit to social media, four in ten globally agree that social media changes their life for the better. In comparison to global adults aged over 25, they have a deeper connection with social media.

Gen Z attitudes towards social media and the internet (Global)



Agree with attitude statements, YouGov Global Profiles March '22

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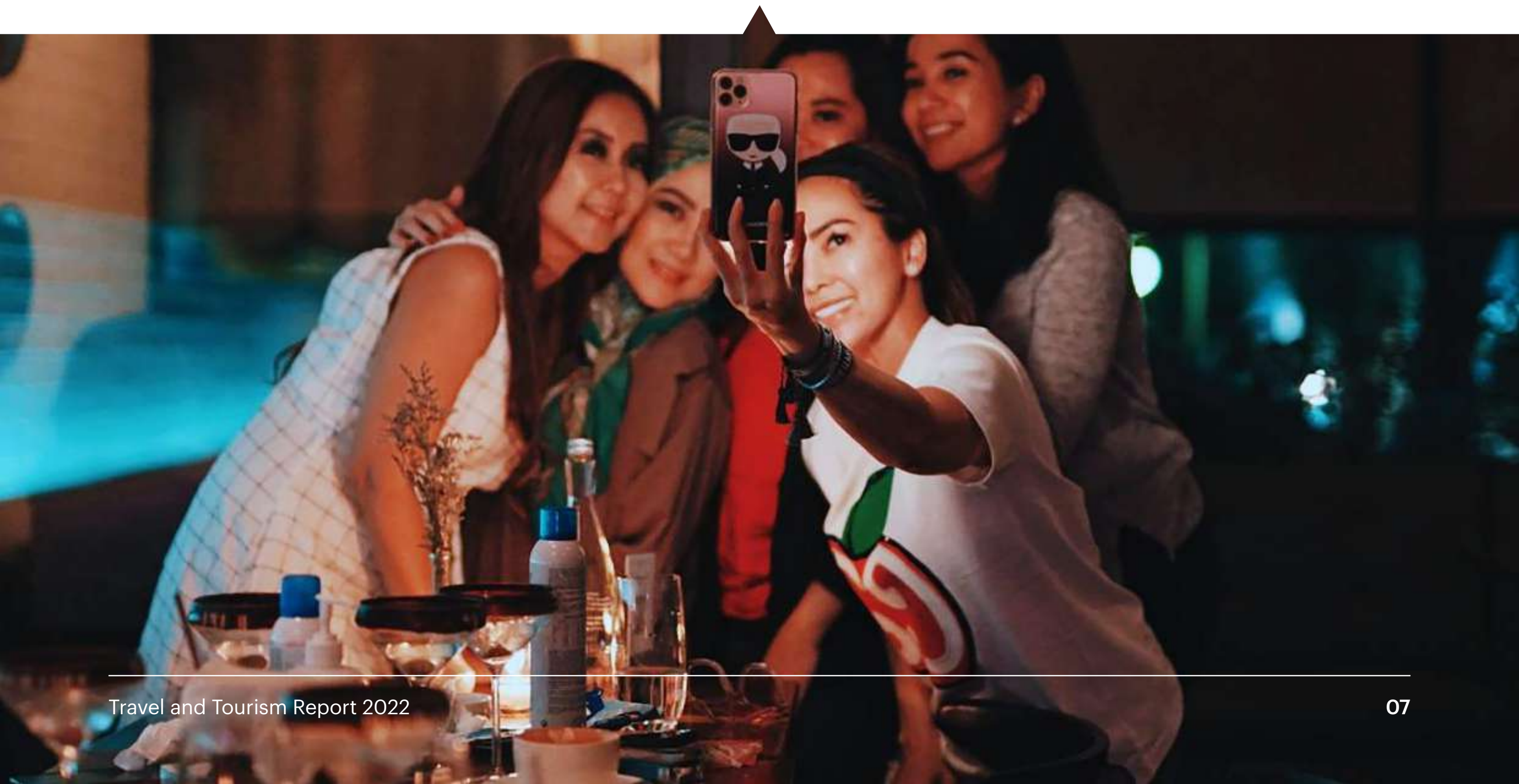
> **As a generation that has grown up in the digital age with little or no memory of a world without smartphones, their expectations around the desire for seamless connectivity at home and whilst traveling are very high.**

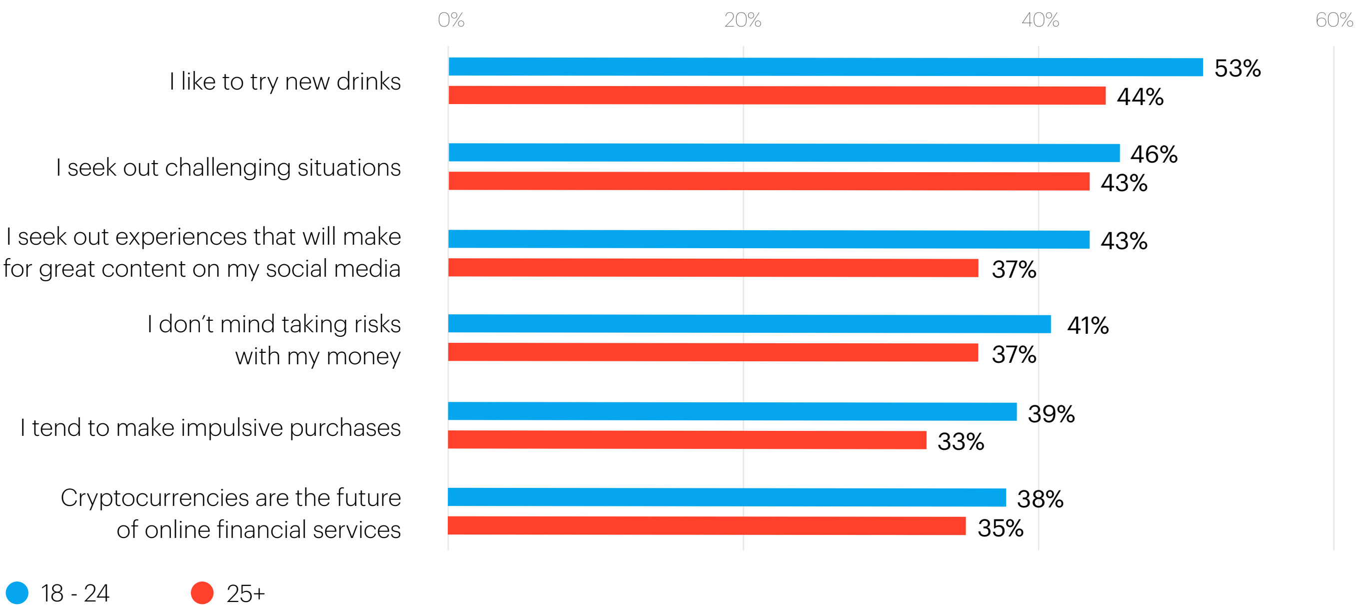


Gen Z are seeking new experiences

In terms of their attitude to life, compared to older 25+ global adults, Gen Z are slightly more experimental, open to new experiences and new challenges. They are more likely to agree they aren't afraid to take risks with their own money and are more impulsive when making purchases.

In addition, they have a stronger curiosity when it comes to new emerging currencies such as cryptocurrency with more than a third agreeing cryptocurrencies are the future of online financial services, making them more crypto-curious than global adults aged over 25.

Attitudes to life – Net agreement (Global)



Agree with attitude statements, YouGov Global Profiles March '22

They have their finger on the pulse and are ahead of the curve

As a hyperconnected generation, global Gen Zs aged 18-24 are more likely than adults around the globe aged 25+ to be aware of new emerging social events and tend to be ahead of the curve in knowing about new lifestyle and design trends, and literature. They are part of an active community and share in a sense of new social experiences and adventures. They like to discover things first and share these discoveries with their peers. This desire to share experiences and in particular travel experiences is an area we will explore later in the report.

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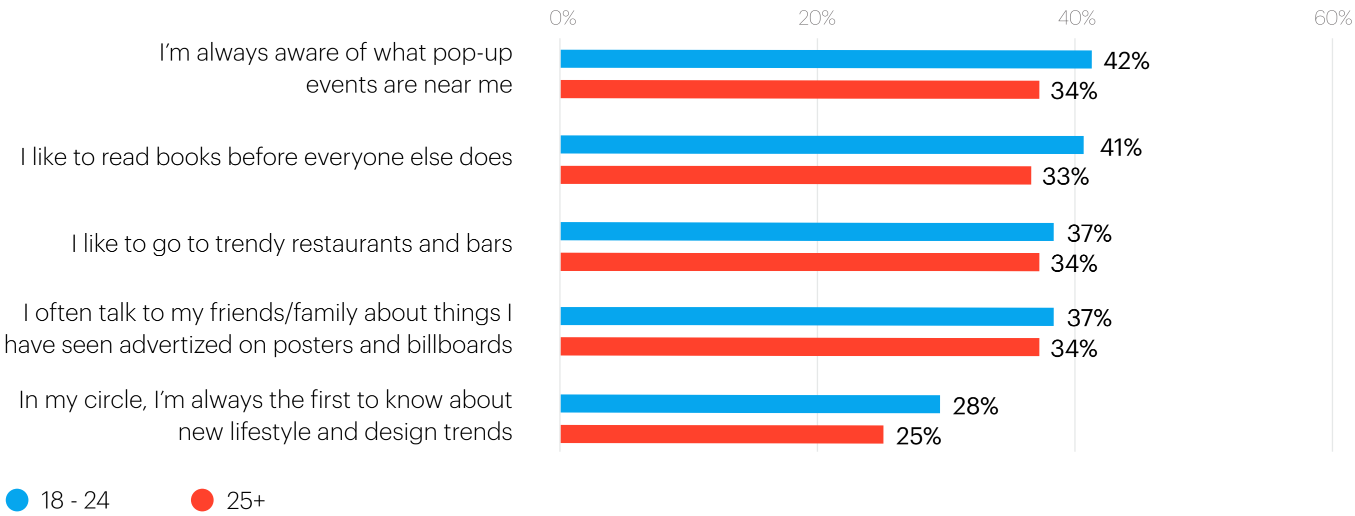
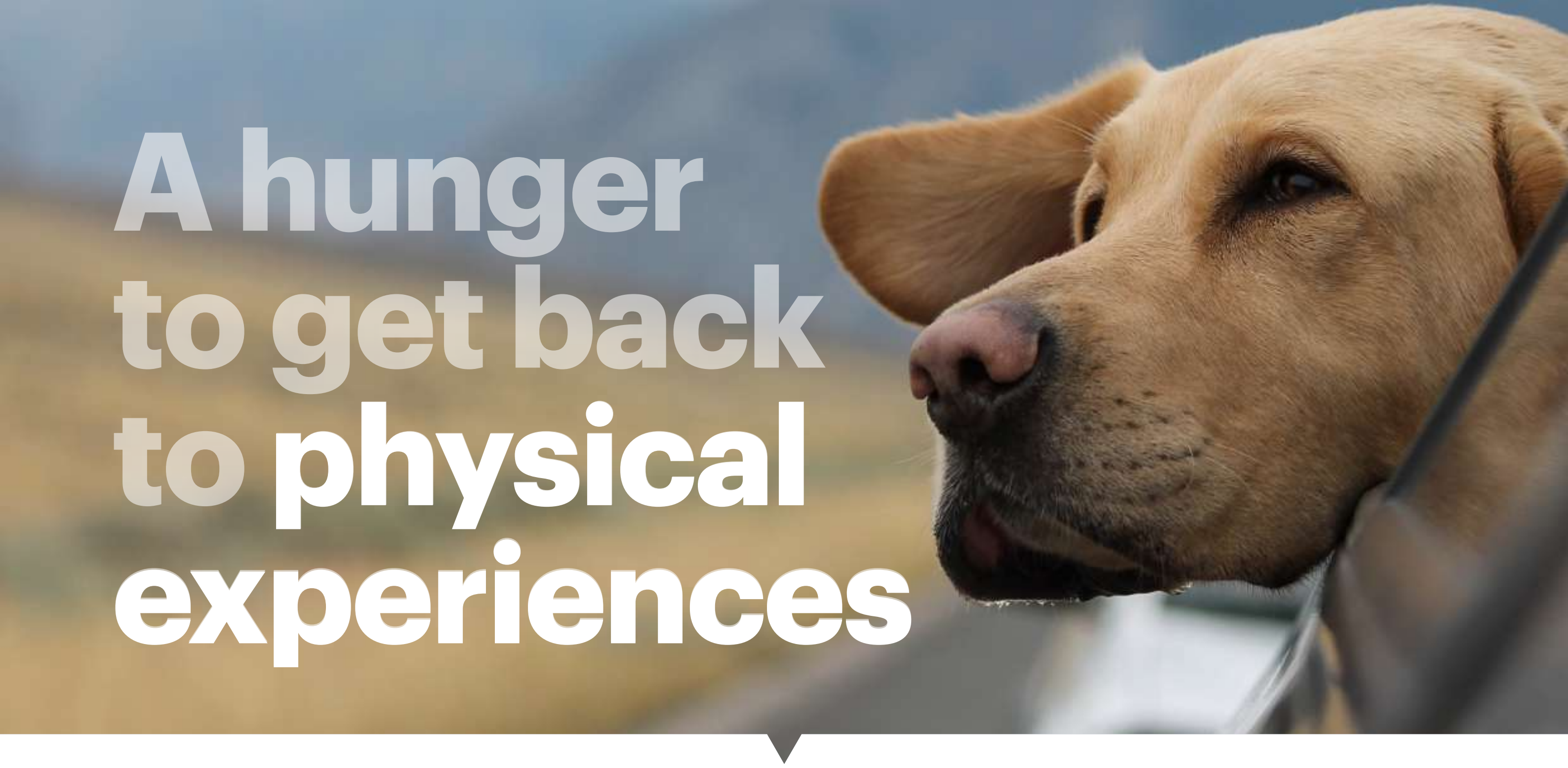
Attitudes to culture, entertainment, and lifestyle – Net agreement (Global)



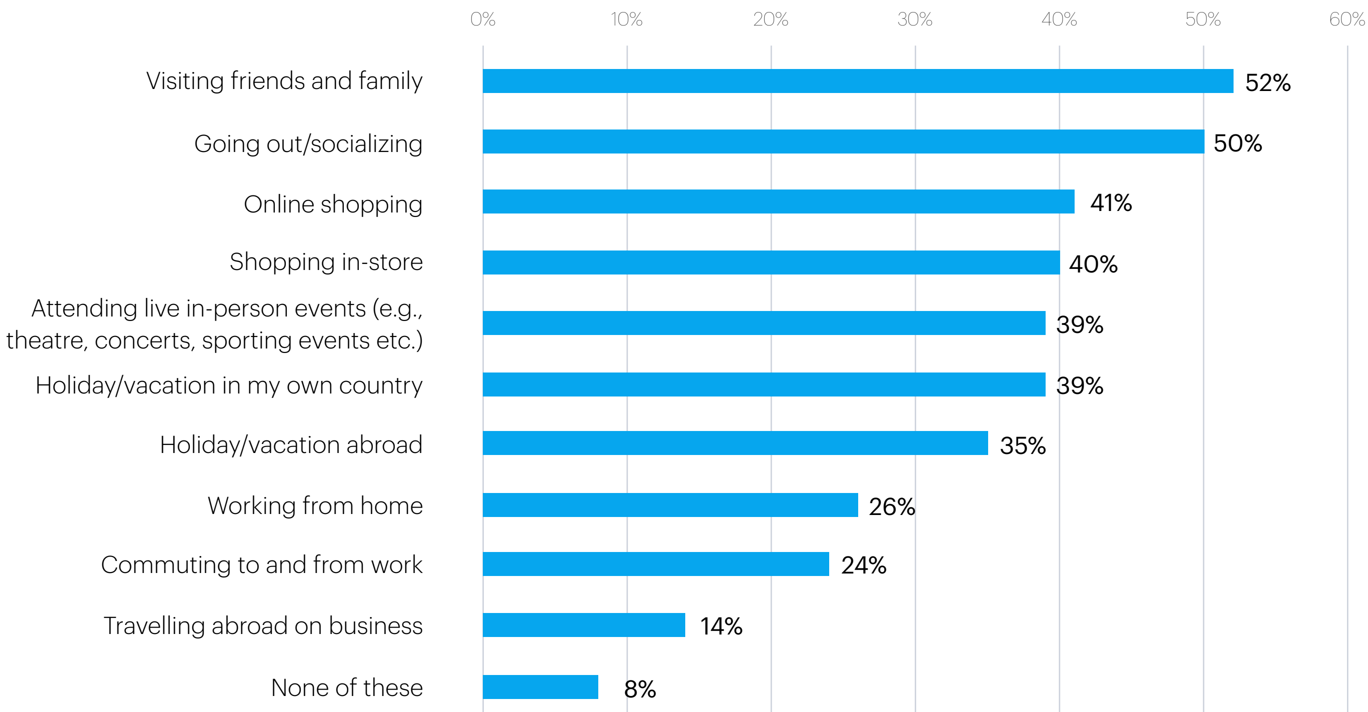
Agree with attitude statements, YouGov Global Profiles March '22



A hunger to get back to physical experiences

However, after more than two years of pandemic life, global Gen Zs are eager to return to their pre-pandemic activities and experiences, after missing out on many of the things they loved before Covid-19. Across **17** international markets, YouGov's Custom Research looked at the outgoing activities that 18–24-year-olds were hoping to do more of in the next 12 months. **Reconnecting with friends and family was top of the activities that more than half of 18–24-year-olds globally were eager to do more of in the next 12 months.** In addition, there is an air of exuberance to return to in-person events and vacations either at home or abroad for more than a third of Gen Z's globally eager to embrace new experiences. This appetite for returning to travel is also reflected in their plans to spend more on travel in the next 12 months.

Activities Gen Zs hope to do more of in the next 12 months (Global)



Q: Which of the following activities are you hoping to do more of in the next 12 months? YouGov Custom Research Oct'21

YouGov Custom Research

Bespoke market research and intelligence. Full end-to-end service from YouGov experts, from sample framing to questionnaire design, analysis, and presentations. Combine the most accurate data with market-leading technology and expertise. Inform your strategy with deep dive research and customized data insights.

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Gen Zs are eager to spend more on travel

To gain an understanding of how the pandemic and two years of travel restrictions have affected the desire for adults across the globe to return to travel, YouGov's Custom Research across **17** international markets explored the core categories that adults were intending to spend more on this year compared to last year.

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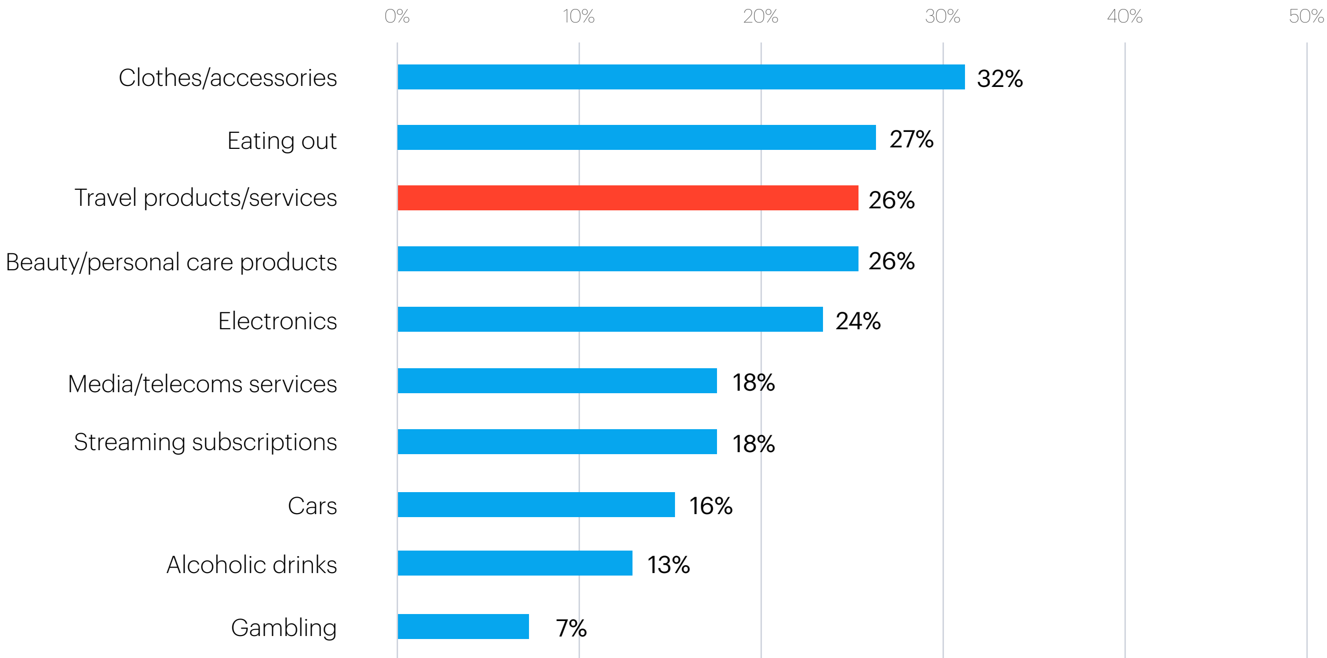
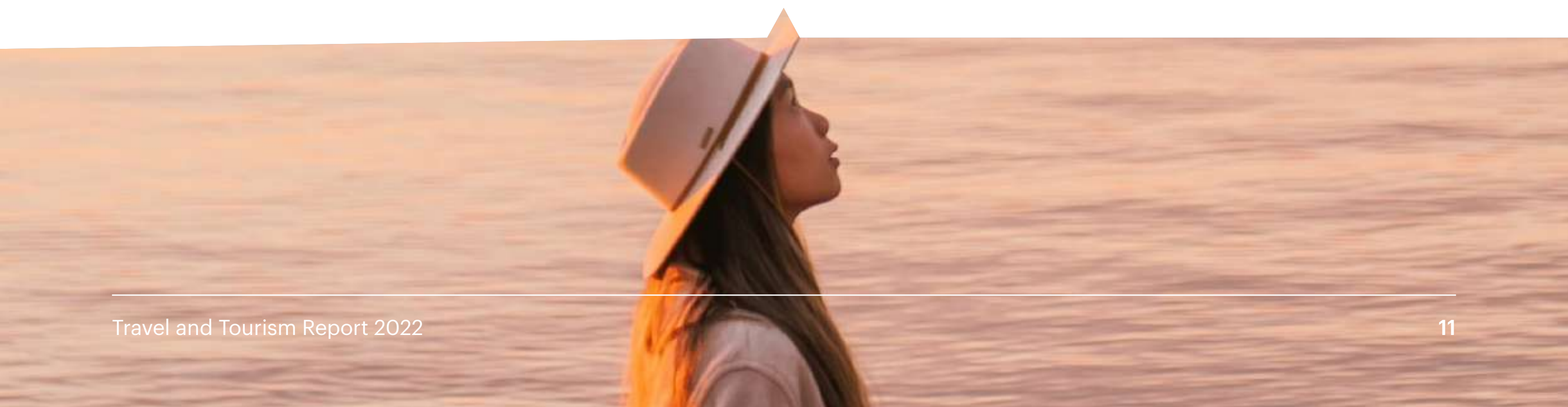
Categories Gen Zs intend to spend more on in the next 12 months (Global)



Q: Thinking about each of the following categories, do you intend to spend more, less or about the same on them next year compared to this past year? YouGov Custom Research Nov '21

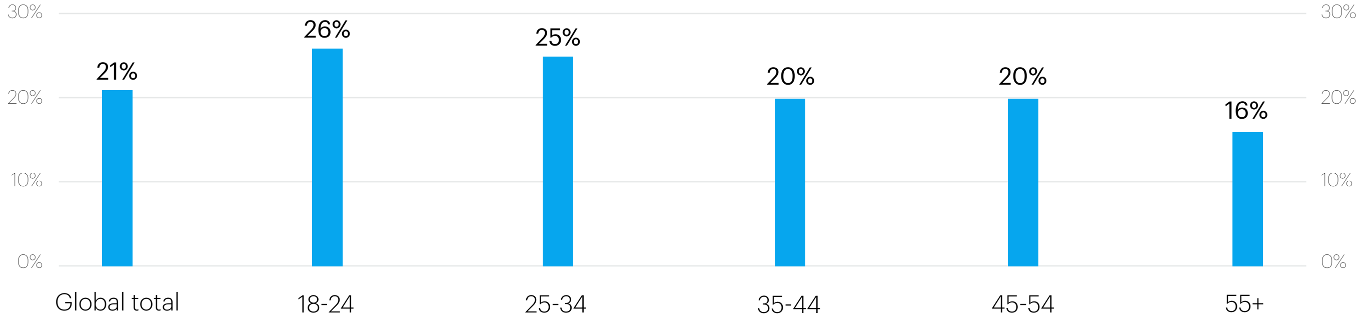
As we have previously seen socializing plays a big part in Gen Z's life, so it is not surprising that apparel and eating out appear as the top two future spend categories. But the intention to spend more on travel products and services ranks very closely behind with a more than a quarter of 18–24-year-olds (**26%**) across the **17** markets surveyed intending to spend more on travel products and services in the next 12 months.



Gen Zs leading the way in spending more on travel this year

In fact, if we compare all global adults who are intending to spend more on travel products and services in the next 12 months, Gen Zs lead the way. A fifth of global adults intend to spend more on travel products and services in the next 12 months (**21%**) compared to the previous year, rising to just over one in four amongst Gen Zs (**26%**) with millennials following closely (**25%**). Whereas in the older 55+ age groups we see a lower intention to spend more on travel in the next year, slightly more reticent than the other age groups.

Intention to spend more on travel products and services in the next 12 months by age (Global)



Q: Thinking about each of the following categories, do you intend to spend more, less or about the same on them next year compared to this past year? YouGov Custom Research Nov '21

Gen Z Brits lead the way in future travel spend

So how does this desire amongst Gen Zs to travel vary across the globe? A quarter of Gen Zs globally intend to spend more on travel products and services in the next 12 months, increasing to four in ten young 18–24-year-old Brits (**44%**), and a third of European Gen Zs in Spain and Italy (**34%** each).

In contrast, American and French Gen Zs are more cautious of their future intention to spend more on travel products and services in the next 12 months (**18%** each) and Gen Z Hongkongers are the most conservative in increasing their spend on travel in the next year.

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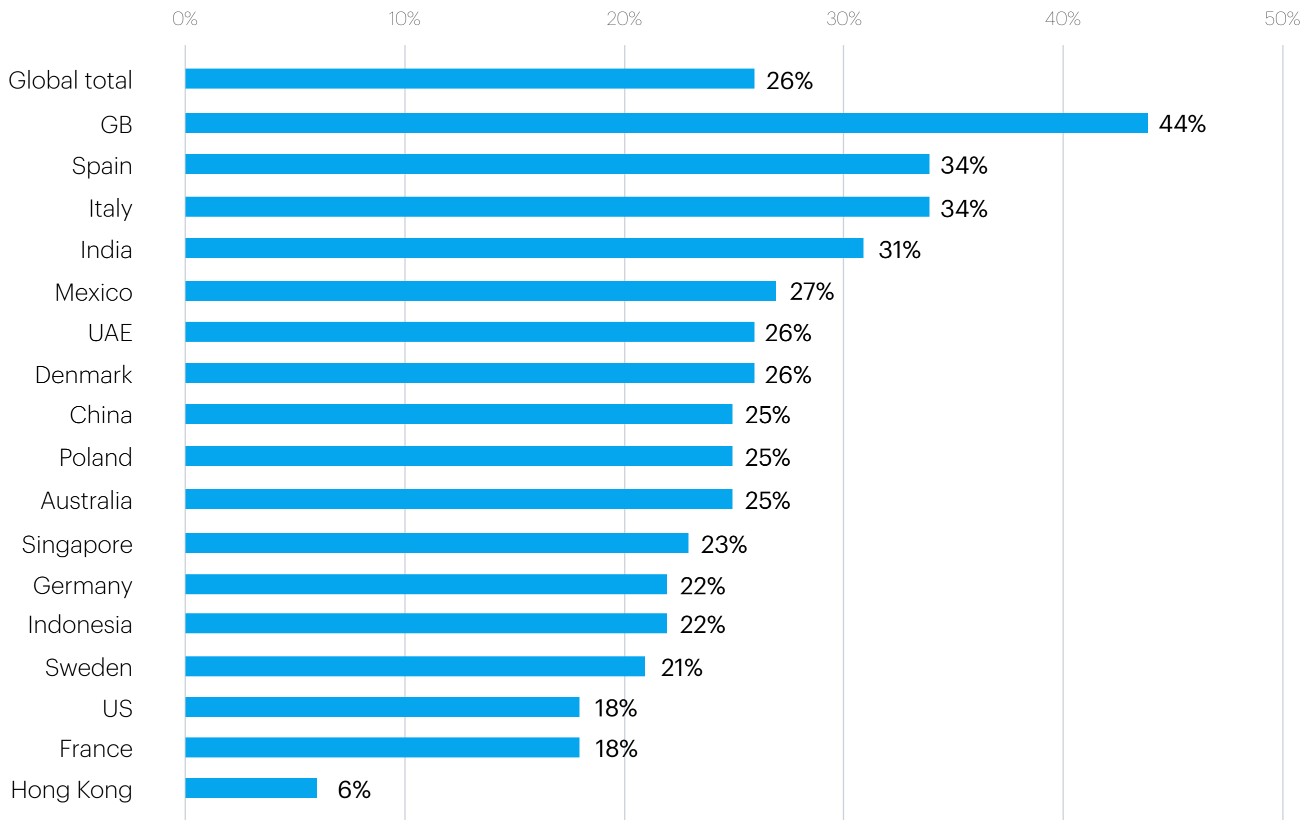
Gen Zs who intend to spend more on travel products and services in the next 12 months by country

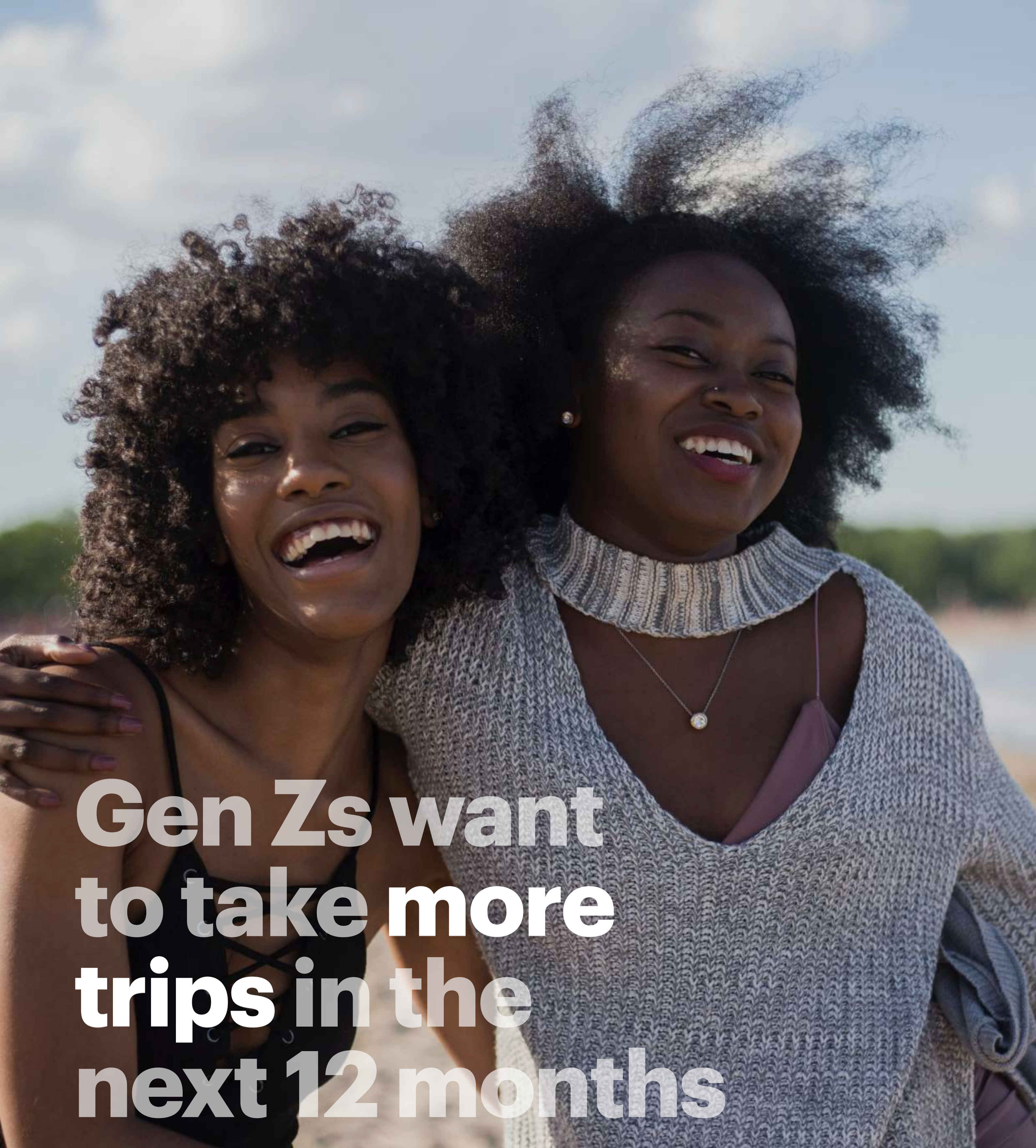


Q: Thinking about each of the following categories, do you intend to spend more, less or about the same on them next year compared to this past year? YouGov Custom Research Nov '21

Section 2

What do Gen Zs want from travel?

In this next section we identify Gen Z's travel behavior, the types and number of vacations they aspire to, their overall attitude to travel and where they seek travel inspiration. Building on their wanderlust and appetite for travel, what sets Gen Z travelers apart as the new generation of travelers? By understanding their travel preferences and delving into what excites and inspires them we can gain a better vision of how travel and tourism could evolve in the years to come.



Gen Zs want to take more trips in the next 12 months

[YouGov Global Travel Profiles] data across **25** major markets, found that three quarters of Gen Zs plan to take some form of travel in the next 12 months (**75%**). In terms of the number of trips Gen Zs are planning to take in the next 12 months, whilst **46%** are planning on taking between one or two trips in the next 12 months, compared to the older 25+ age groups they are more likely to want to take three trips or more (**30%** plan to take 3+ trips vs **27%** of over 25s).

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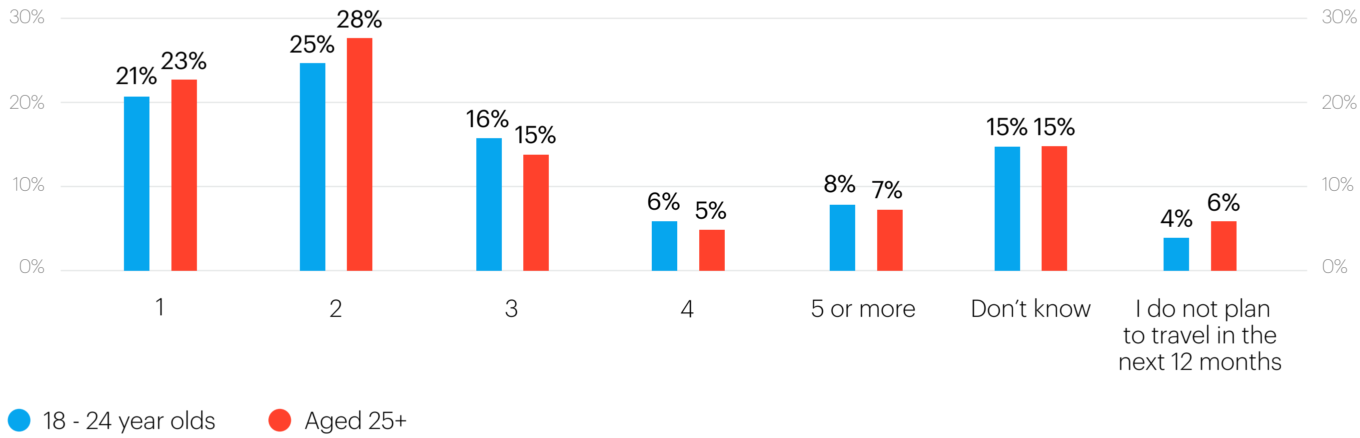
Planned number of trips next 12 months globally from April 2022



Q: How many trips, if any, are you planning to take for leisure, business, or personal reasons in the next 12 months?
YouGov Global Travel Profiles April '22

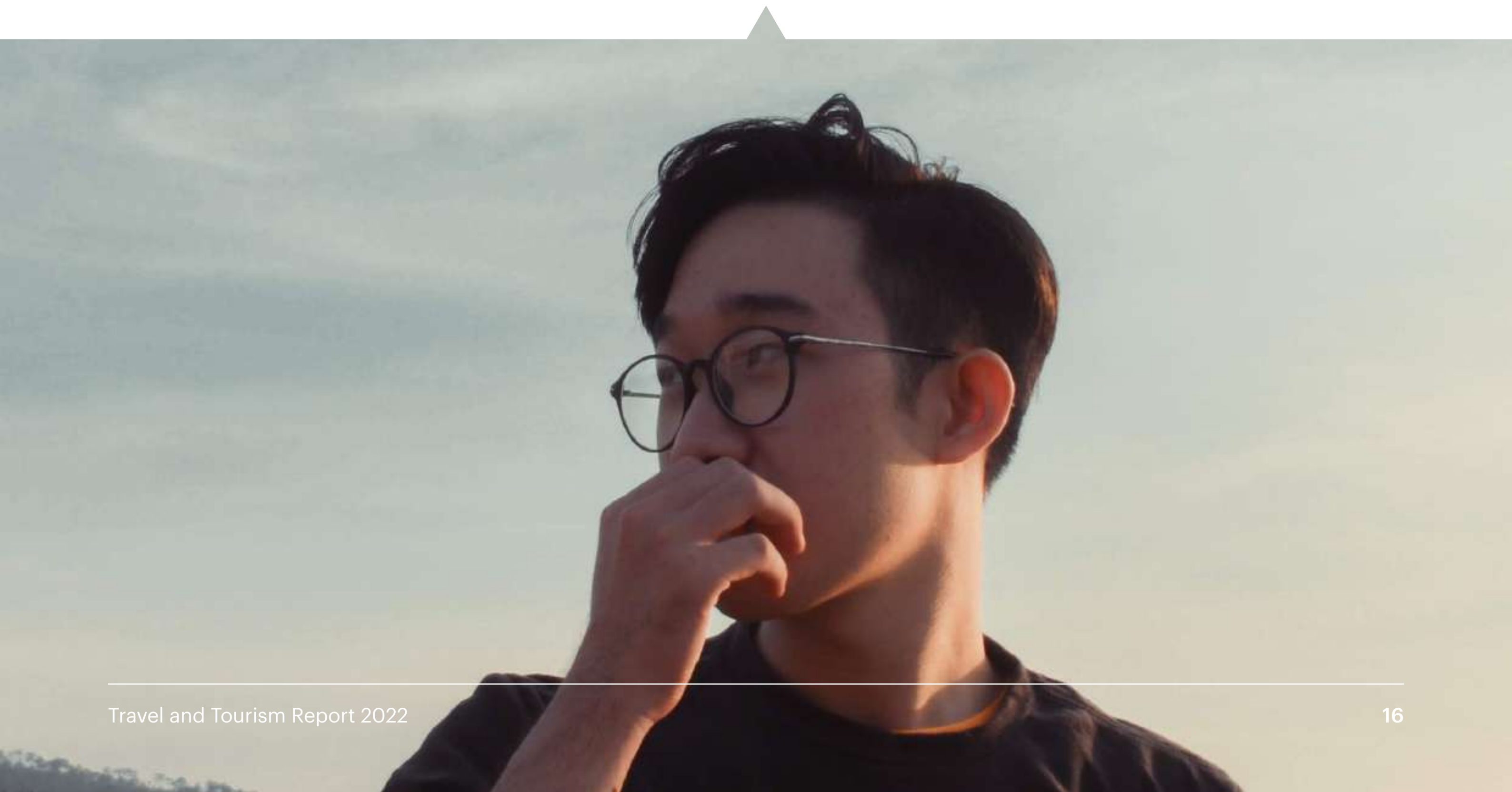
After two years of restrictions, destinations closing their borders and travel put on pause, a higher proportion, four in ten 18–24-year-olds, are planning on taking domestic vacations in the next 12 months compared to **16%** who are planning on taking international vacations.

Comparing Gen Zs amongst the **25** countries monitored in Global Travel Profiles and their future intentions to take domestic vacations, which countries are over and under indexing for domestic travel amongst the Gen Z segment?

YouGov Global Travel Profiles

Understand your travel customer. Track global consumer demand and attitudes towards travel, across the largest tourism markets. Survey consumers daily in 25 markets – identify who is ready to travel when, where they want to go and what kind of trip they are planning.

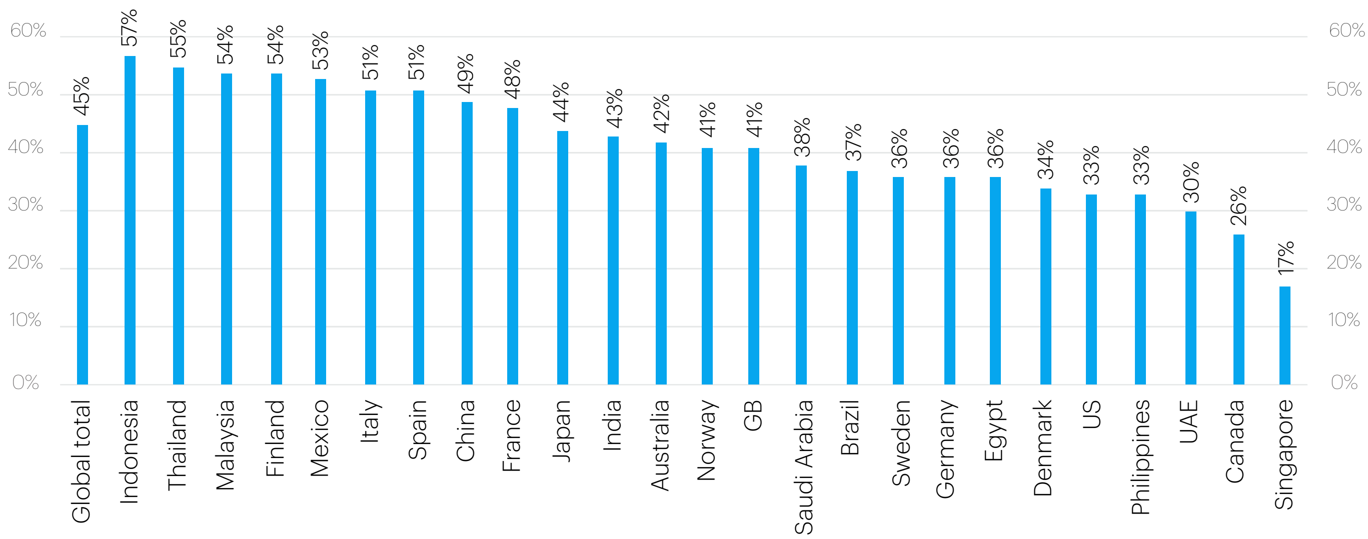
FIND OUT MORE



Gen Zs in Asian markets are more likely to take domestic vacations

More than half of Gen Zs in Indonesia, Thailand and Malaysia are intending to take domestic vacations in the next 12 months. Other countries that over index against the average for Gen Z's interest in domestic travel are Finland, Mexico, and Italy. Whilst Spain, China and France are more likely than the global total to take domestic vacations, they fall just slightly below the halfway mark of **50%.**

Gen Zs who intend to take a domestic vacation inn the next 12 months, April '22



Q: Which, if any of the following trips are you planning to take in the next 12 months? YouGov Global Travel Profiles April '22

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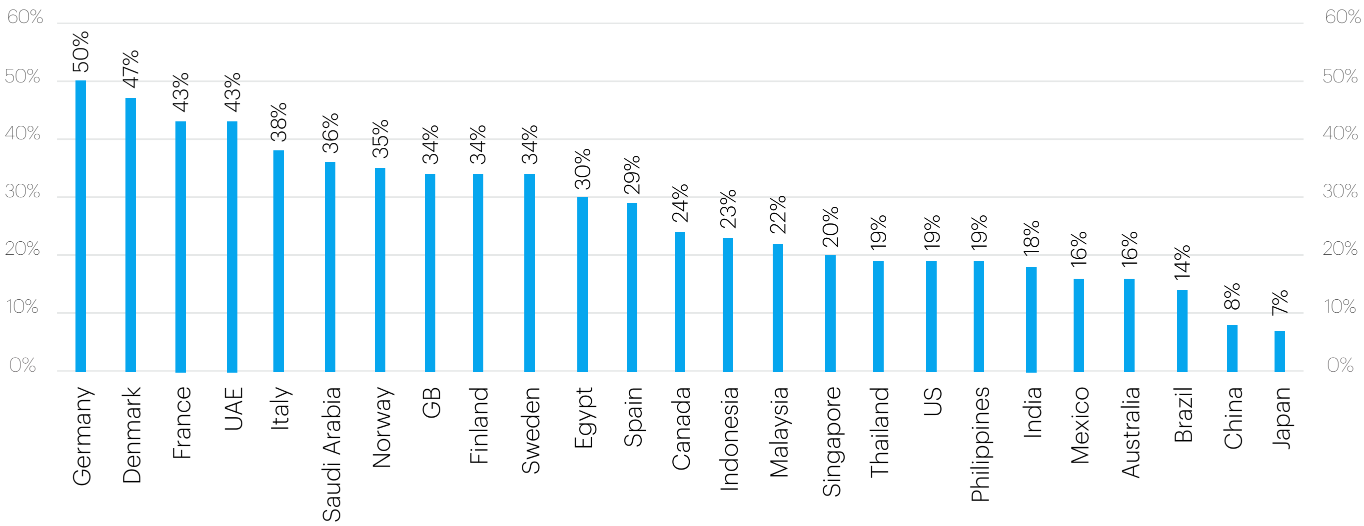
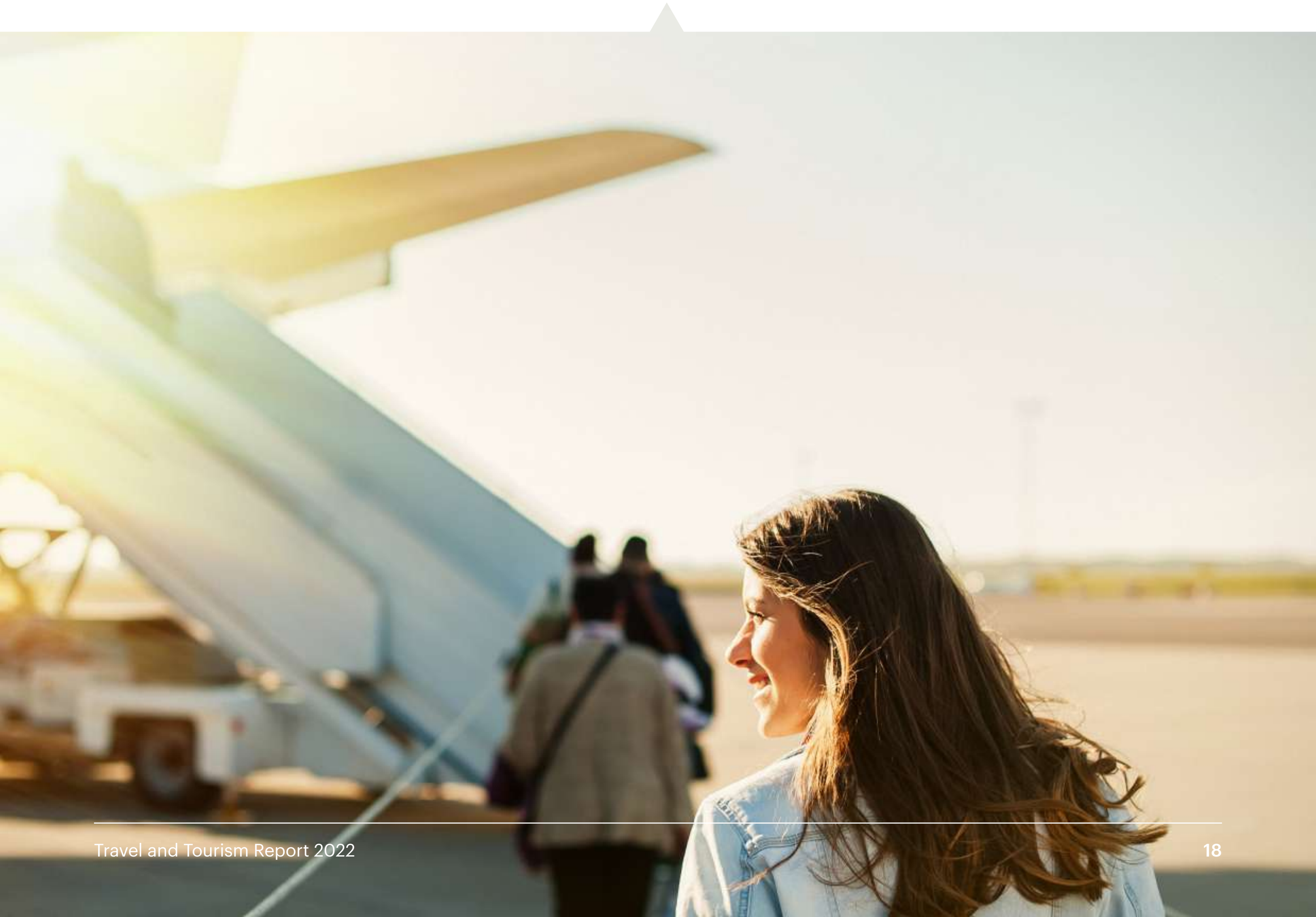
European Gen Zs dominate international travel intention

Gen Zs in European markets are more likely to want to take an international vacation in the next 12 months. For instance, German and Danish Gen Zs are more likely to want to travel abroad than vacation in their own country, with **50%** of German Gen Zs wanting to take an international trip compared to **36%** who want to take a domestic trip. However, whilst domestic travel outweighs international travel intention, Gen Zs have a greater desire than other age groups to travel far and wide once the pandemic has ended.

Gen Zs who intend to take an international vacation in the next 12 months, by country, April '22



Q: Which, if any of the following trips are you planning to take in the next 12 months? YouGov Global Travel Profiles April '22



Gen Zs have a stronger appetite to travel overseas

YouGov Global Travel Profiles found that across the **25** markets surveyed, almost four in ten respondents globally agreed they couldn't wait to go on a vacation overseas, growing to nearly half amongst Gen Zs (**47%**), who had the highest agreement with the statement, indicating a strong desire to travel worldwide. Whereas, in comparison, the over 55s are more wary about overseas travel with only a quarter of those aged 55+ (**26%**) agreeing with the statement.

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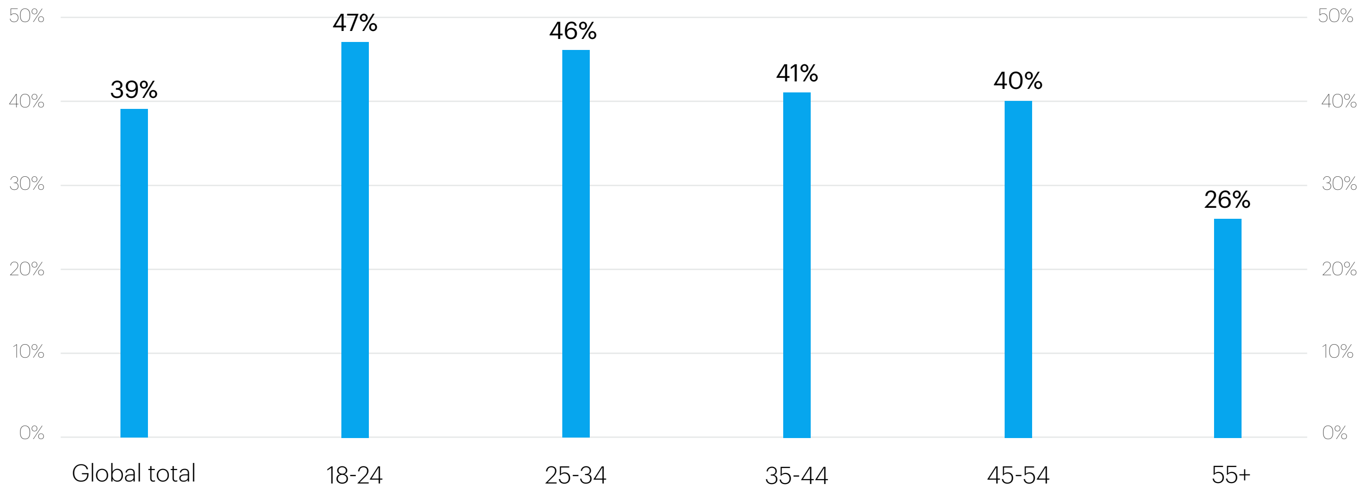
‘I can’t wait to go on a vacation/vacation overseas from April 2022’ – Net agreement by age (Global)

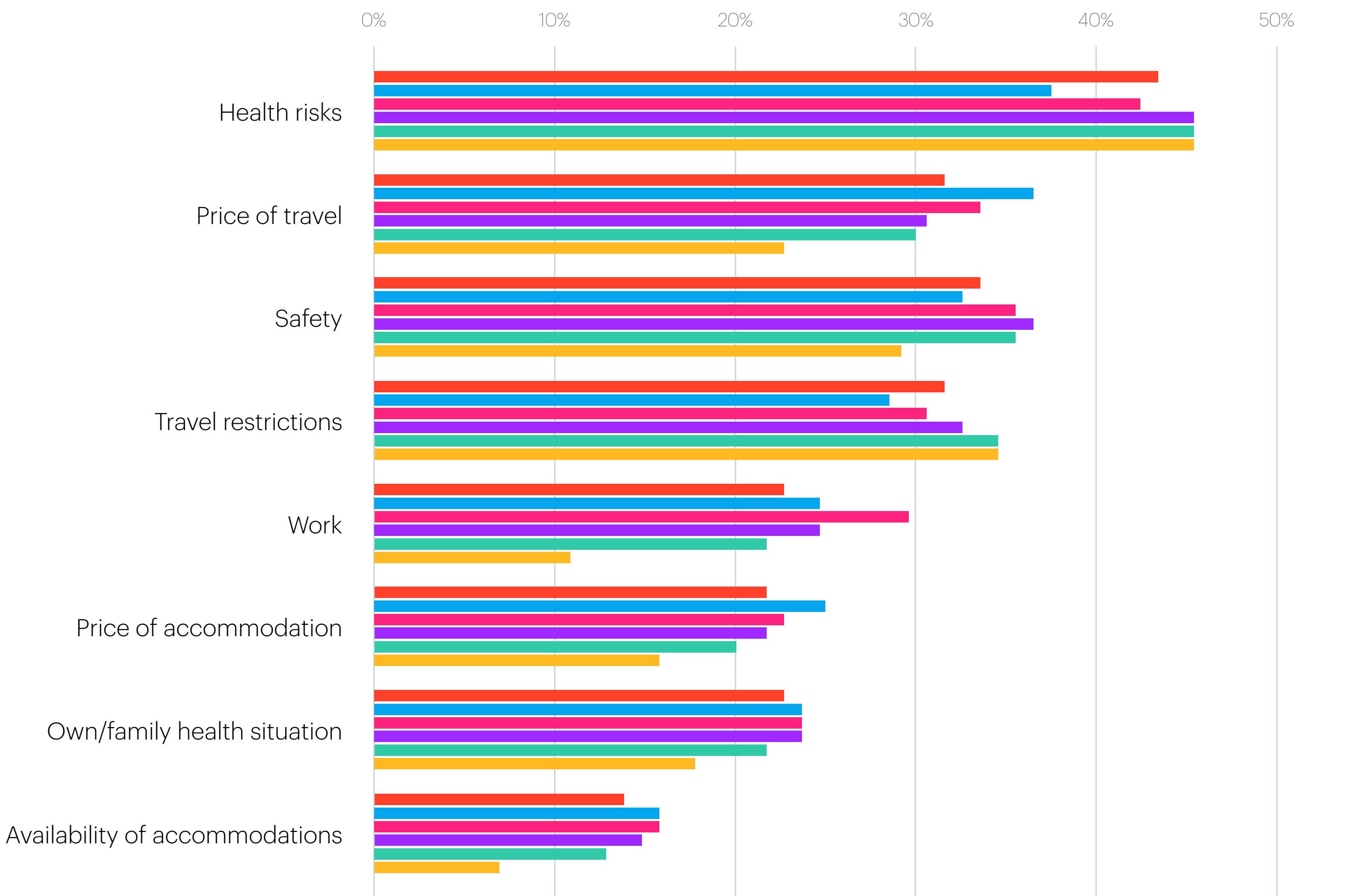


Q: Do you agree or disagree that as a result of Coronavirus - I can’t wait to go on a vacation/vacation overseas.
YouGov Global Travel Profiles April ‘22

Price more of an obstacle for Gen Z travelers

Naturally, health risks rank as the top concern globally for all age cohorts and in particular in the older generations. But for the Gen Zs who are finding their way in the world, the price of travel and the price of accommodation is a higher obstacle, suggesting increased sensitivities to price in this younger age group. Over a third of Gen Zs (**37%**) cite the price of travel as a barrier compared to the global total of **32%** and a quarter of Gen Zs state the cost of accommodation as a barrier to travel. Budget as an influence on travel-making decisions seems to decrease the higher the age, this may be due to more financial stability with career progression.

Travel obstacles by age (Global)



Global total   18-24   25-34   35-44   45-54   55+

Q: Which, if any of the following factors are currently preventing you from travel? YouGov Global Travel Profiles April '22

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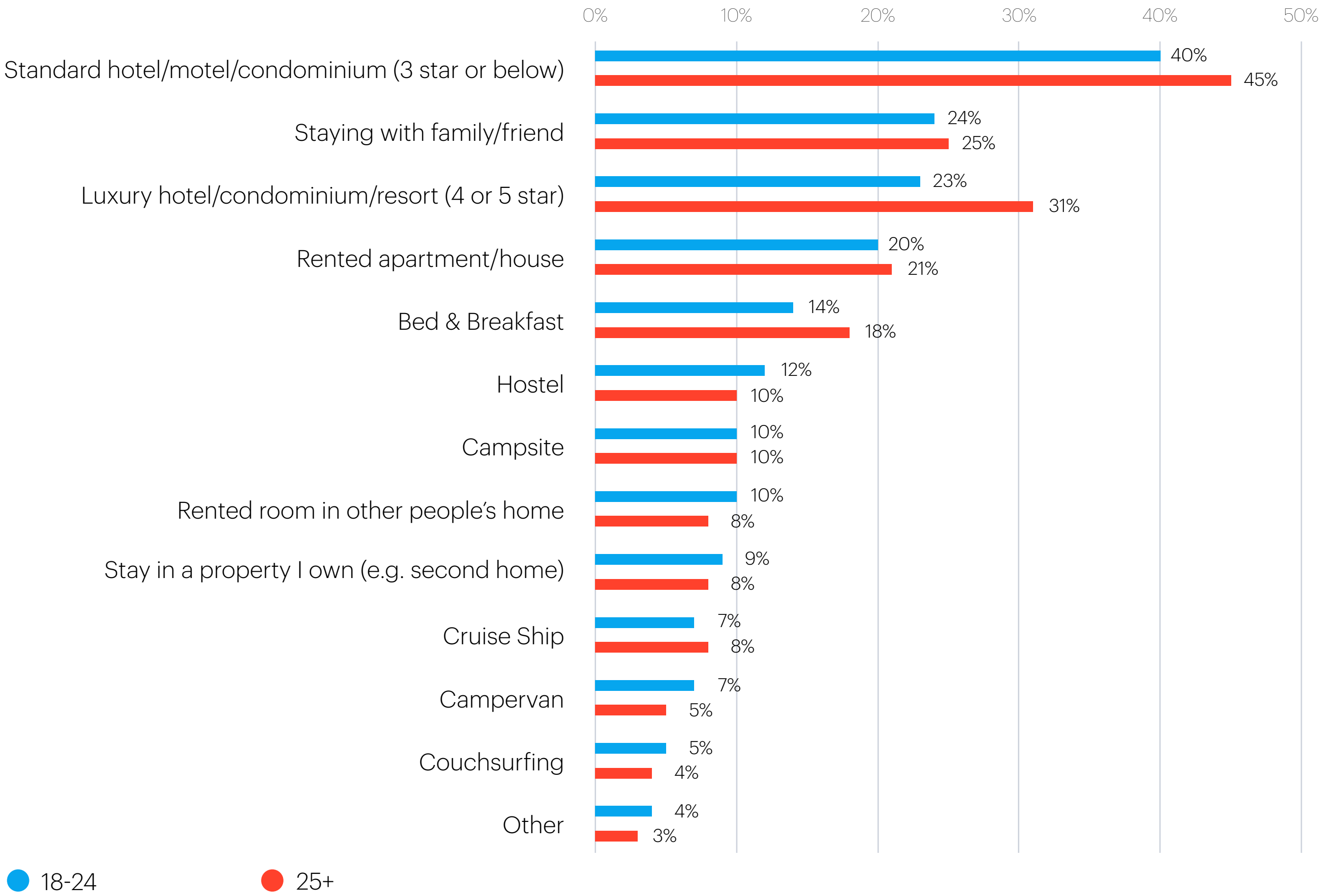
Gen Zs open to more unique types of accommodation

Gen Zs have a heightened awareness of the cost of accommodation, this may strongly influence their consideration for more budget-friendly alternatives offering unique experiences. Whilst standard 3-star hotels and 5-star hotels rank in the top three types of accommodation types that Gen Z frequent on vacation, they are slightly more likely to opt for staying in hostels, renting rooms in other people's homes, campervans, and couch surfing. Staying with family/friend's is the second most common accommodation type for almost a quarter of Gen Zs (**24%**) offering them the chance to both connect with friends and loved ones without breaking the budget.

Accommodation typically stay in when on vacation (Global)



Q: Which, if any, of the following types of accommodation do you typically stay in when you are on vacation?
YouGov Global Travel Profiles April '22

Budget friendly accommodation ranks in the top three for Gen Zs across the globe

Comparing the top three types of accommodation that Gen Z's stay in across the **25** markets covered on YouGov Global Travel Profiles, standard accommodation (3 star or below) ranks as the primary type of accommodation in **20** out of the **25** countries and ranks in the top three for all **25** countries. However, there are some nuances in the top types of accommodation for some countries.

Staying with friends/family ranks in the top three for **16** out of the **25** countries with the remaining countries opting for the independence and freedom of a rental apartment, or house staying with family/friends. Vacation rentals rank as the preferred preference for Gen Zs in France and the second preference in the European countries of Germany, Spain, and the UK.

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Top three types of accommodation Gen Zs typically stay in by country

18–24-year-olds	1st	2nd	3rd
Global total	Standard hotel/motel/ condominium (3 star or below)	Staying with family/friend	Luxury hotel/condominium/resort (4 or 5 star)
Australia	Standard hotel/motel/ condominium (3 star or below)	Staying with family/friend	Luxury hotel/condominium/resort (4 or 5 star)
Canada	Standard hotel/motel/ condominium (3 star or below)	Staying with family/friend	Luxury hotel/condominium/resort (4 or 5 star)
France	Rented apartment/house	Standard hotel/motel/ condominium (3 star or below)	Staying with family/friend
Germany	Standard hotel/motel/ condominium (3 star or below)	Rented apartment/house	Staying with family/friend
India	Standard hotel/motel/ condominium (3 star or below)	Staying with family/friend	Luxury hotel/condominium/resort (4 or 5 star)
Indonesia	Standard hotel/motel/ condominium (3 star or below)	Staying with family/friend	Luxury hotel/condominium/resort (4 or 5 star)
Italy	Standard hotel/motel/ condominium (3 star or below)	Bed & Breakfast	Rented apartment/house
Spain	Standard hotel/motel/ condominium (3 star or below)	Rented apartment/house	Luxury hotel/condominium/resort (4 or 5 star)
Thailand	Standard hotel/motel/ condominium (3 star or below)	Bed & Breakfast	Staying with family/friend
UK	Standard hotel/motel/ condominium (3 star or below)	Rented apartment/house	Luxury hotel/condominium/resort (4 or 5 star)
US	Standard hotel/motel/ condominium (3 star or below)	Staying with family/friend	Luxury hotel/condominium/resort (4 or 5 star)

Q: Which, if any, of the following types of accommodation do you typically stay in when you are on vacation?
YouGov Global Travel Profiles April '22

Top hotels and travel brands considered by British Gen Zs

Interestingly if we look at YouGov BrandIndex data to explore the travel brands that are top of mind for Gen Z, Airbnb has the highest level of travel brand consideration. As previously highlighted, rented apartments/houses ranked as the second most popular type of accommodation that British Gen Zs would typically stay in so it is interesting that Airbnb ranks as the top travel brand that they are most likely to consider booking with over the 12 months. Budget airline easyJet and legacy carrier airline British Airways rank as the second and third brand for consideration amongst British Gen Zs. In terms of online travel agencies (OTA's), Booking.com leads the way with a brand consideration score of **38** amongst the top **10**, with Jet2.com ranked in 8th position and Trivago ranked **10th**. In terms of budget friendly accommodation, Premier Inn and Travelodge also rank in the top ten travel brands considered by British Gen Zs.

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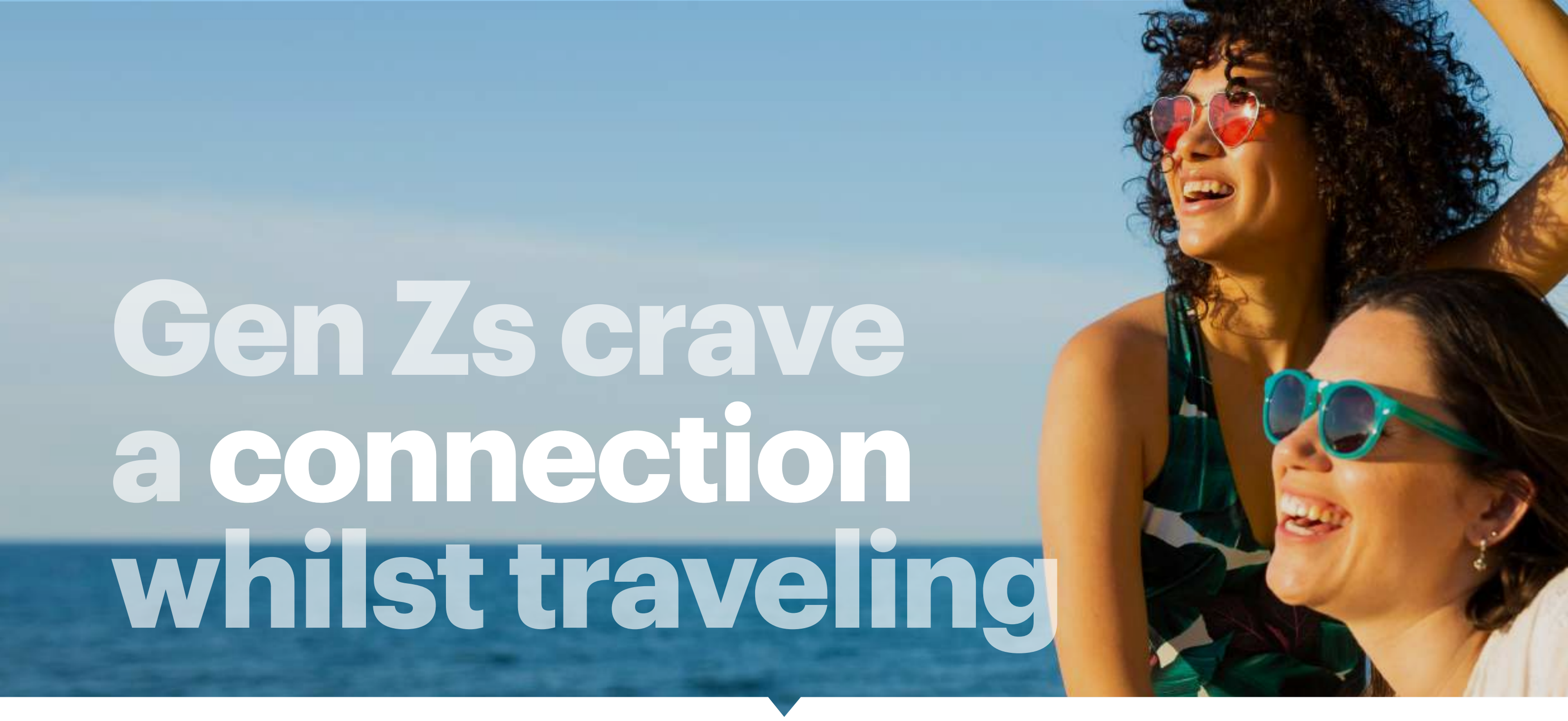
Travel brand consideration (UK Top 10)

Rank	Brand name	Score
1	Airbnb	**41.8**
2	easyJet	**41.3**
3	British Airways	**38.9**
4	Booking.com	**38.4**
5	Premier Inn	**36.1**
6	Ryanair	**29.3**
7	Travelodge	**26.6**
8	Jet2.com	**24.7**
9	TUI	**23.0**
10	Trivago	**21.6**

Source: YouGov BrandIndex UK May '22

Gen Zs open to mixing budget with luxury

Although budget friendly options are the most common dwelling type for Gen Zs, they are prepared to also mix it up with luxury experiences. In **20** of the **25** countries surveyed, luxury accommodation ranks in the top three, but is the preferred accommodation type in the Middle Eastern markets of UAE and Saudi Arabia. However, in contrast for five of the markets surveyed luxury accommodation does not appear in the top three vacation dwellings (Brazil, Germany, Italy, Philippines, and Thailand). So, although price is more of a barrier to Gen Zs, they are open to higher-end experiences in their repertoire of accommodation types. This suggests destinations and travel operatives must include a wide variety of accommodation options for Gen Zs catering for budget, uniqueness, and upscale accommodation offerings.

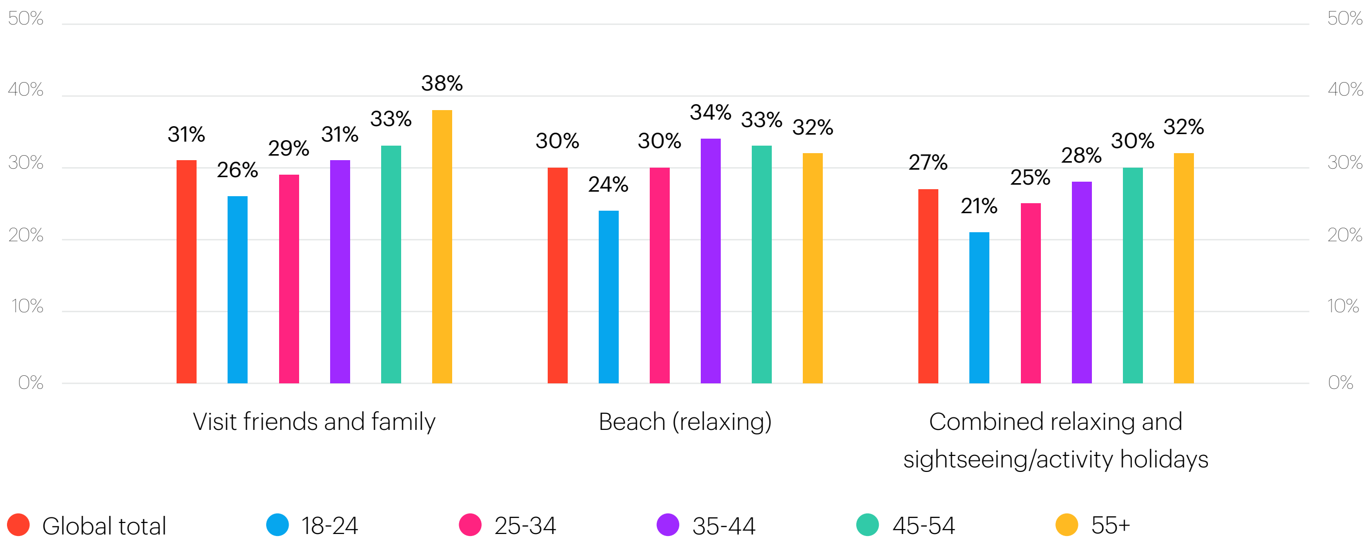


Gen Zs crave a connection whilst traveling

Across the globe, visiting family and friends is the most popular type of vacation for just under a third of global adults (**31%**), closely followed by beach (**30%**) and a combination of relaxing, sightseeing and activity vacations (**27%**). Whilst Gen Zs also state these as their top three favorite types of vacation, their results are lower than all other age groups.

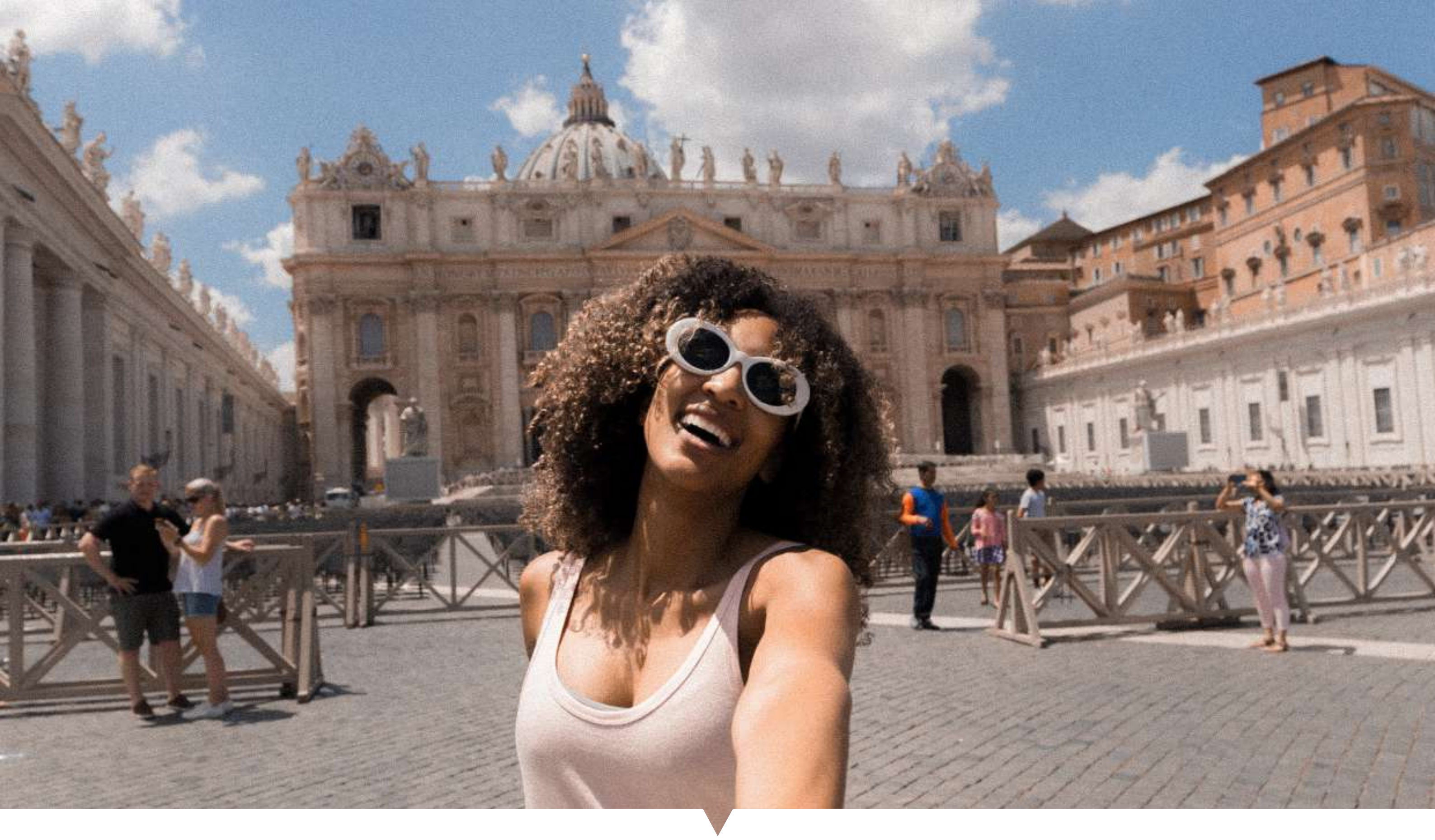
▶ LEARN MORE ABOUT OUR DATA

Top three favorite vacation types globally by age (Global)

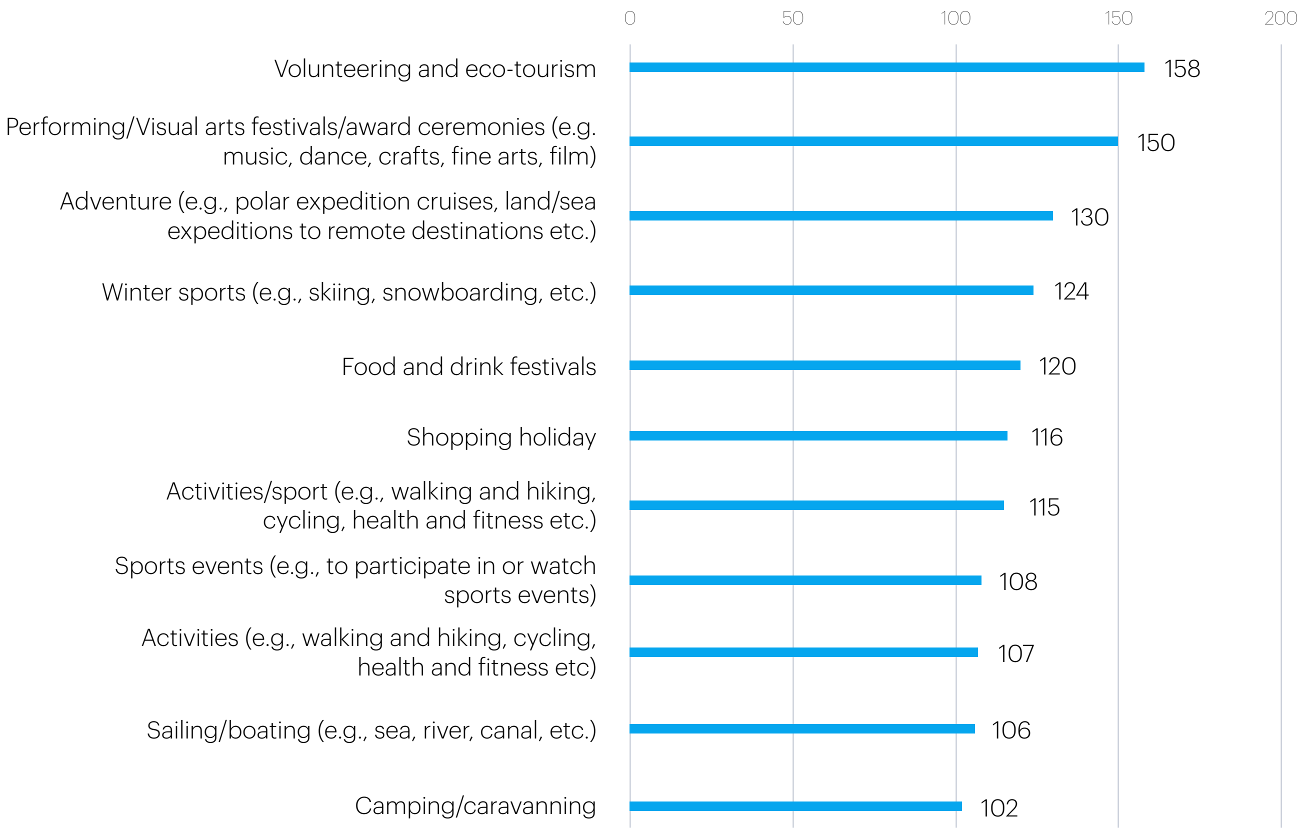


Q: Thinking more generally to the types of trips that you go on, which if any, of the following types of vacations do you typically take? YouGov Global Travel Profiles April '22

The types of vacations in which global Gen Zs over-index, compared to over 25-year-olds, are the ones that allow to form a deep connection with the local community, showing a strong interest in localism and the authentic cultural experience that individual countries can offer.

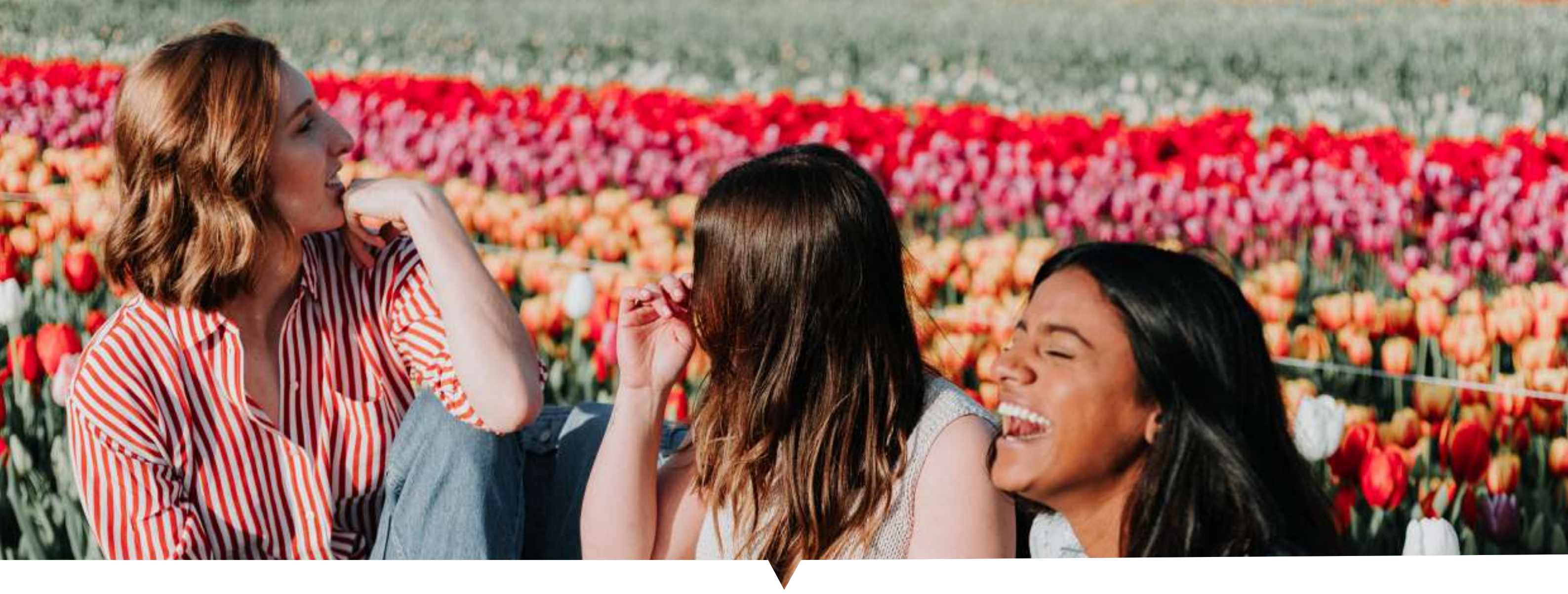


Vacation types that Gen Zs over index against over 25s (Global)



Q: Thinking more generally to the types of trips that you go on, which if any, of the following types of vacations do you typically take? YouGov Global Travel Profiles April '22

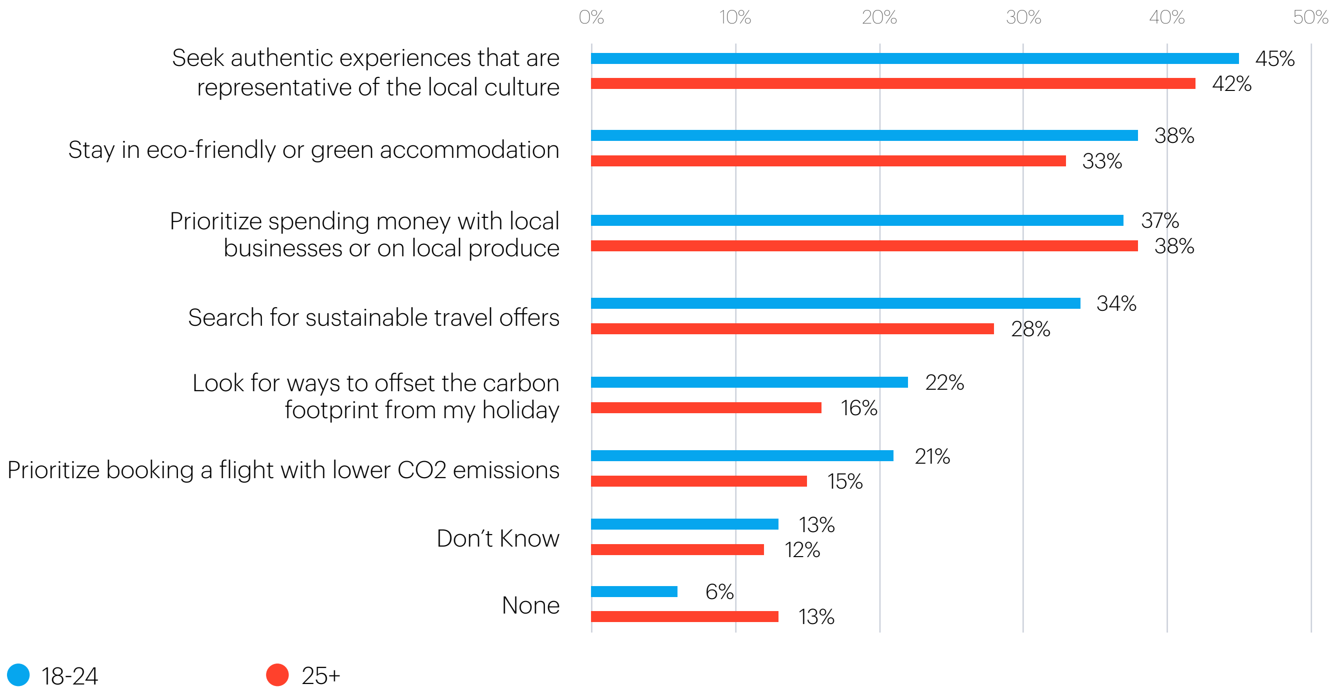
They are also more likely to be interested in traveling with a purpose such as volunteering and eco-tourism, moved by a desire to do something meaningful and giving back to the community. Global Travel Profiles also reveals they have a passion for understanding more about other cultures and build real life experiences whilst traveling. As a generation they are more interested in enjoying their vacation in a unique way, connecting with the locals, their traditions, heritage, and food. As well as connecting positively with the local community they also want to live unique adventurous experiences such as traveling to remote destinations or challenging themselves both mentally and physically.



Authentic travel experiences whilst giving back

They have a stronger desire to seek out authentic experiences that represent the local culture compared to their older counterparts, and they also want to financially support the local communities albeit within more constrained budgets. Just over a third of global Gen Zs prioritize spending money with local businesses or on local produce when on vacation (**37%**) on a par with global over 25-year-olds (**38%**).

Things would consider doing on your next vacation (Global)

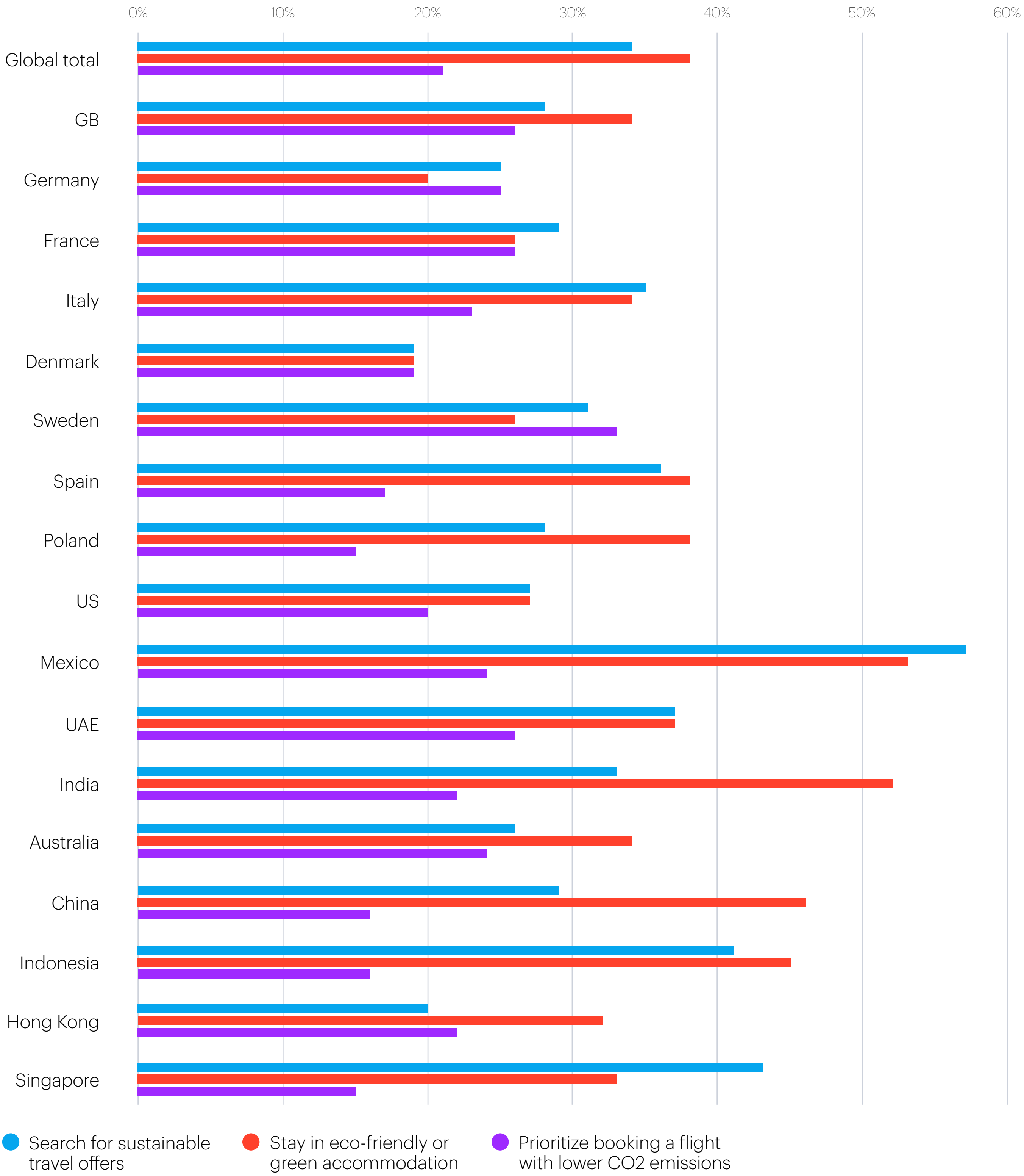


Q: Which, if any, of the following would you consider doing? YouGov Custom Research April '21

Where we do see small differences amongst Gen Zs in comparison to over 25s globally is around the area of sustainable travel. **Almost four in ten global Gen Zs would consider staying in an eco-friendly or green accommodation** on their next vacation (**38%** 18–24-year-olds globally) compared to a third of global over 25s (**33%**). A third of Gen Zs are also open to search for sustainable travel offers (**34%**), **6%** points above the 25+ cohort. Just over a fifth are looking for ways to offset their carbon footprint from their vacation and prioritize booking a flight with lower CO2 emissions and are more likely to be concerned about their travel impact on the environment than older generations globally.

Sustainable travel high on Mexican Gen Z's consideration

Gen Zs in Mexico are more likely than their peers in all other countries to be considering searching for sustainable travel offers or consider staying in eco-friendly/green accommodation. Sustainable travel offers also rank high in Asian markets with Singaporean and Indonesian Gen Zs among the top three behind Mexico. For eco-friendly/green accommodation Gen Zs in India and China appear in the top three whilst European Gen Zs in Denmark, Germany and France are in the bottom three to be considering eco-friendly travel accommodation. However, lowering C02 emissions is of higher consideration amongst Gen Zs in Sweden, Great Britain, and France.



Q: Which, if any, of the following would you consider doing? YouGov Custom Research April '21

Gen Z's desire for vacation enrichment

In addition, travel also acts as a vehicle for Gen Zs to widen their experiences, fulfil their aspirations, enhance their skills and knowledge, and educate and excite them. They are less likely than over 25s globally to state that from their next vacation they just want to get away or relax and more likely to prefer personal fulfilment and enrichment from their next travel experience. Whilst half of Gen Z travelers crave excitement and adventure (**50%**), four in ten seek the fulfilment of being able to visit a destination they have always dreamed about and aspired to visit. **As they plan for their next big trip, they also have a strong desire for personal development and enrichment,** with just under a third wanting to broaden their horizons (**30%**), and around a fifth seeking traveling for education purposes (**22%**) to learn a new language (**22%**) or to learn/develop a new skill (**18%**).

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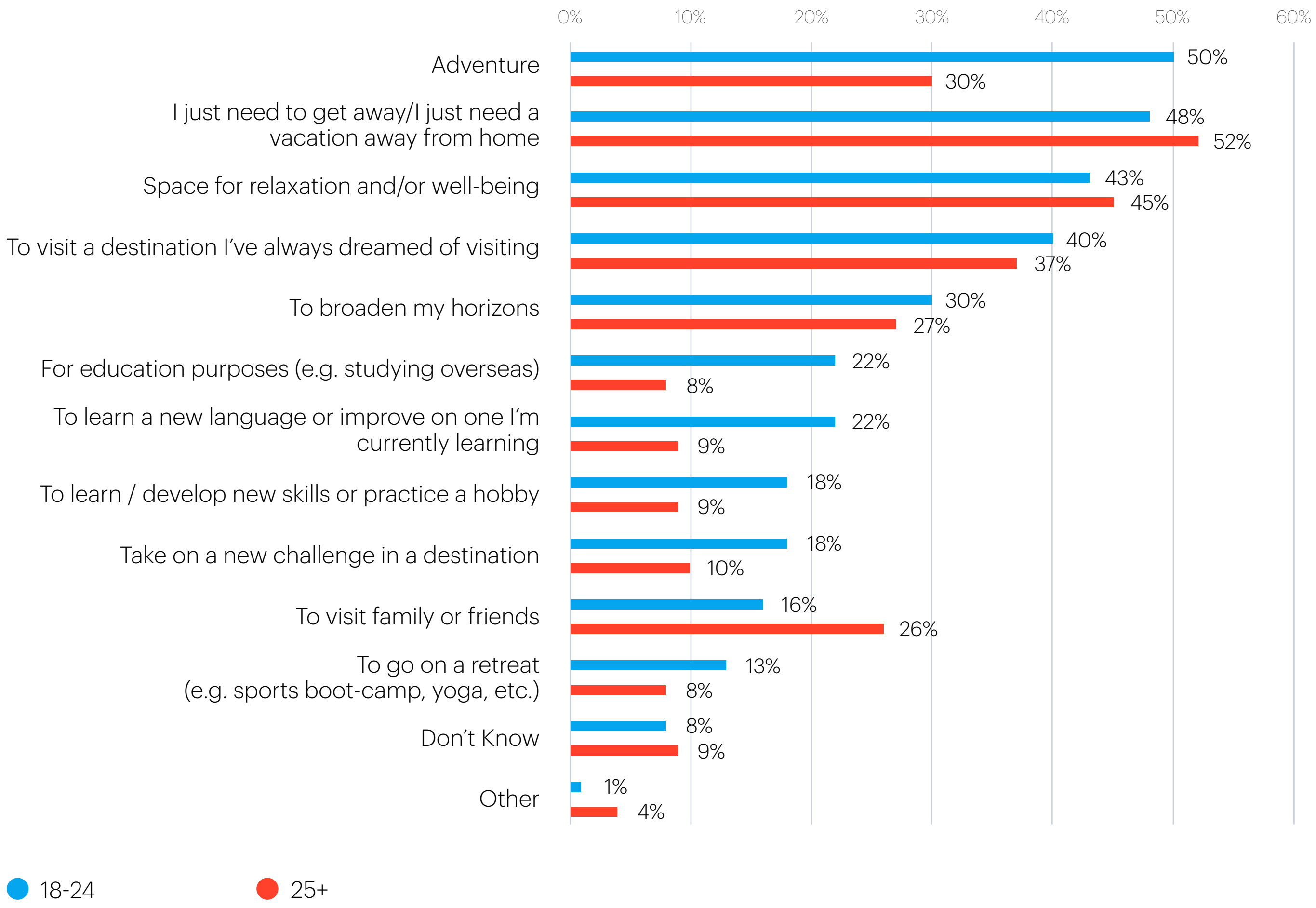
What are you looking for on your next vacation? (Global)



Q: Which, if any, of the following are you looking for in your next travel destination? International Omnibus study, carried out in 8 countries from 21st March to 30th March

If travel destinations want to capture the hearts of this generation of travelers, they will have to enhance their experiential offering to provide cultural experiences, adventure and excitement whilst building on how they can help and enrich the Gen Z traveler.

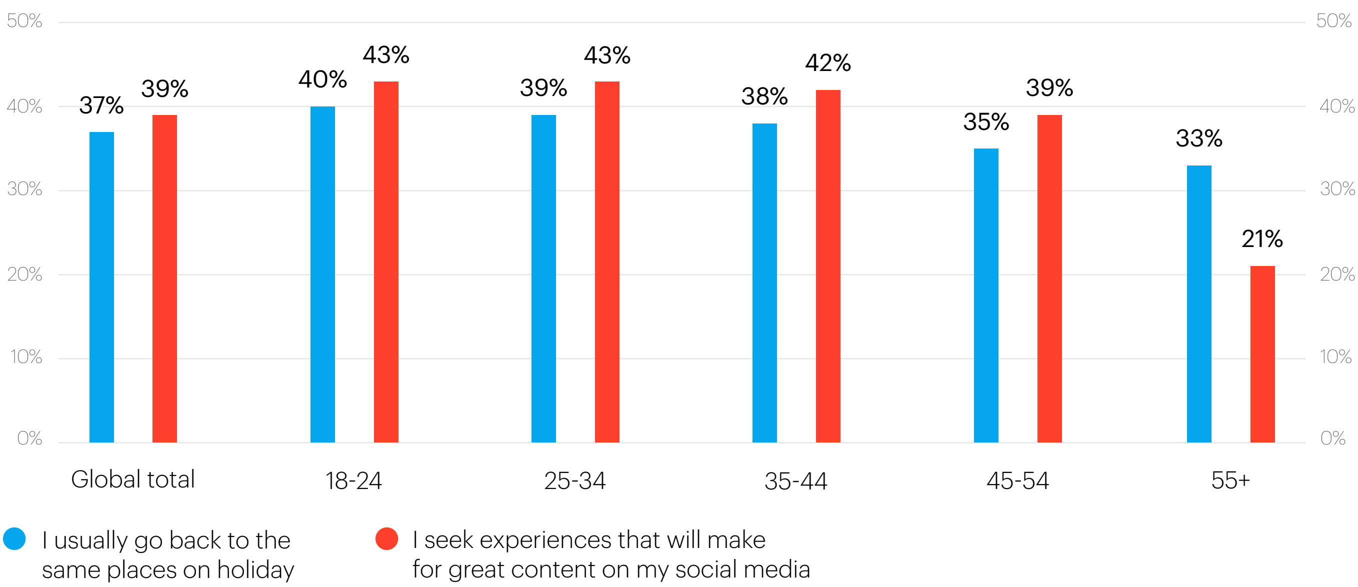
Develop your relationship with Gen Z travelers

As Gen Z seek a deep connection with the country they visit, it is even more important for travel destinations to start connecting with these travelers now to build loyalty in the future. This future generation of travelers are more likely to return and give more value back to the destination over time.

Across the globe, compared to different age groups Gen Z have the strongest level of loyalty in returning to destinations they are familiar with, **40%** of Gen Z globally agree they usually go back to the same places on vacation and are the highest scoring age group to agree with the statement.

▶ EXPLORE MORE DATA

Travel statements – Net agreement by age (Global)

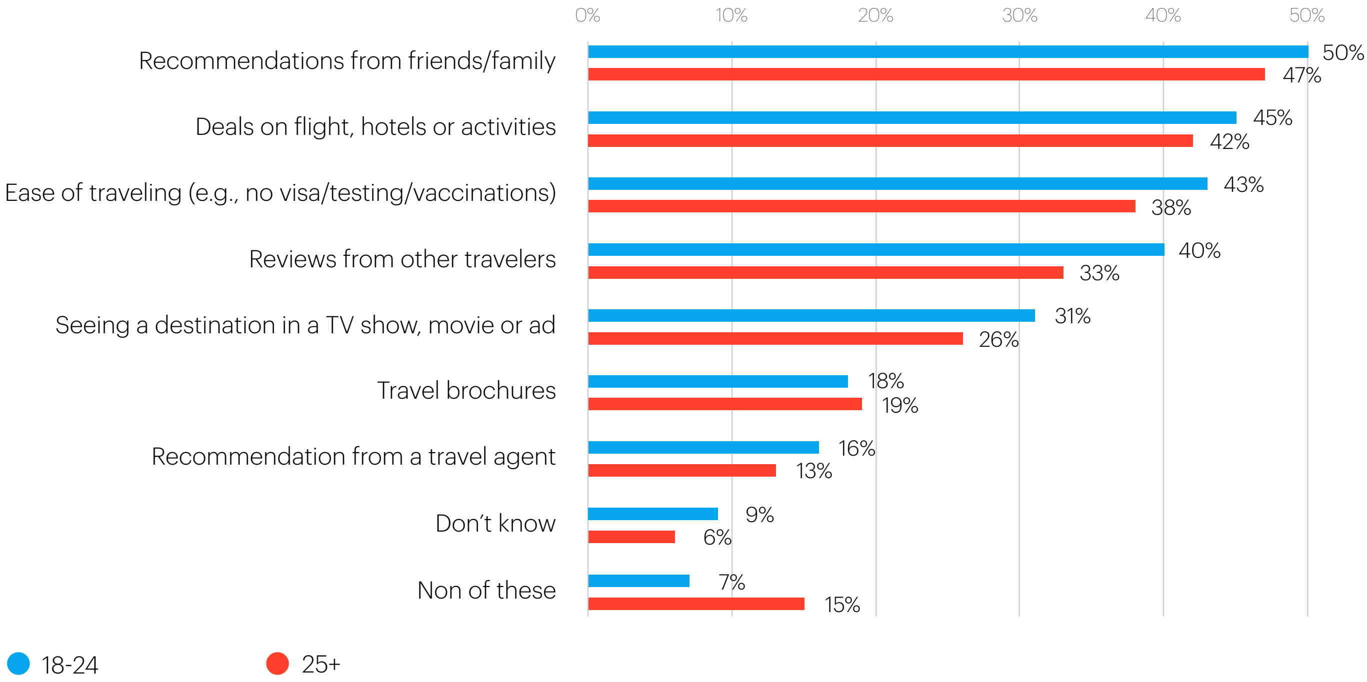


Q: Agreement with statements, YouGov Global Profiles March '22

Gen Zs more influenced by reviews from other travelers than experts

For global Gen Zs, recommendation is still a powerful tool with half of them (**50%**) stating that recommendations from family and friends influence their choice for a travel destination. They are also considerably more likely to seek validation from family and friends and from other travelers in the form of reviews (**40%**), way above travel agents (**16%**) or travel brochures (**18%**). Gen Zs seek the authenticity of real people's travel experiences and opinions above travel experts when considering their destination of travel.

Factors influencing travel destination (Global)



Q: Which, if any, of the following influence your consideration for a travel destination? YouGov Custom Research Oct '21

Asian markets more influenced by recommendations and reviews

Asian Gen Zs are more likely to be influenced by recommendations from family and friends with two thirds of 18–24-year-old Singaporeans (**68%**), over six in ten Indonesians (**62%**) and Hong Kong (**61%**) Gen Z's seeking trusted affirmation and recommendation from their family and friends to help influence their destination choice. In contrast, Gen Zs in America, UAE, and Germany are less likely to be influenced by family and friends vacation recommendations. Indonesian, Chinese and Singaporean Gen Zs all over-index for being influenced by reviews from real travelers (**53%**, **48%** and **47%** respectively) along with Indian Gen Z (**51%** vs **40%** of global Gen Zs). Again, Americans are less trusting of other traveler's experiences (**26%**) along with Australians and the Danes (**26%** and **24%** respectively).

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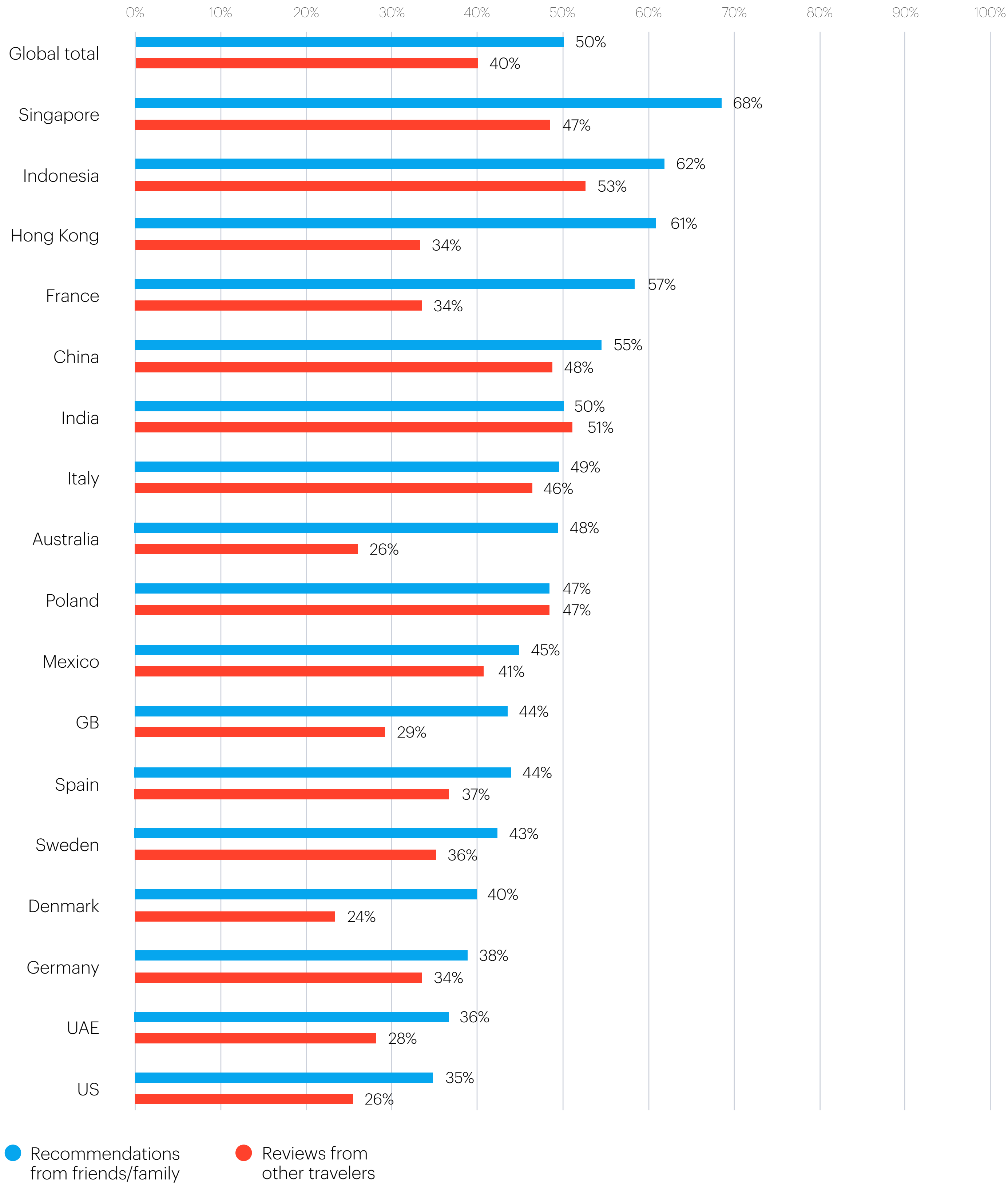
Gen Zs influenced by recommendations and reviews from other travelers when considering a travel destination by country



Q: Which, if any, of the following influence your consideration for a travel destination? YouGov Custom Research Oct '21

Market insight

Reliance on family, friends and other travelers when planning a travel destination highlights a high level of spillover across traveler segments. For brand marketers, this is a very important insight. Any form of mass marketing will have a cumulative effect of raising awareness and building destination preferences among Gen Zs through this spillover and also the influence that other traveler segments have over this younger cohort.

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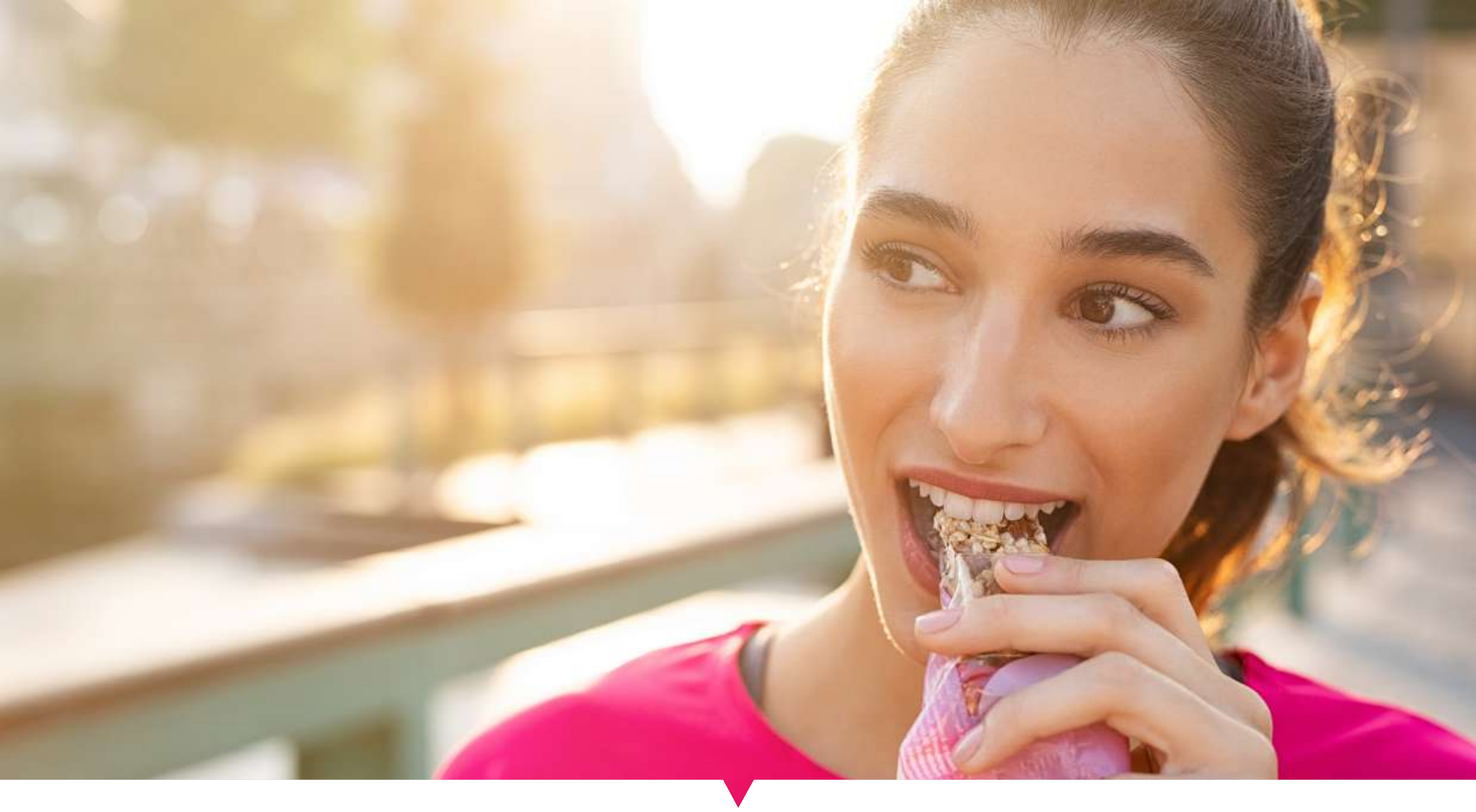
Vacation deals are also important

As highlighted earlier, Gen Zs are value conscious and therefore the allure of a good deal is a core influencing factor in choosing a travel destination among 18–24-year-olds. Asian and European markets are more likely to be travel savvy and driven by the deals on flights, hotels, and activities.

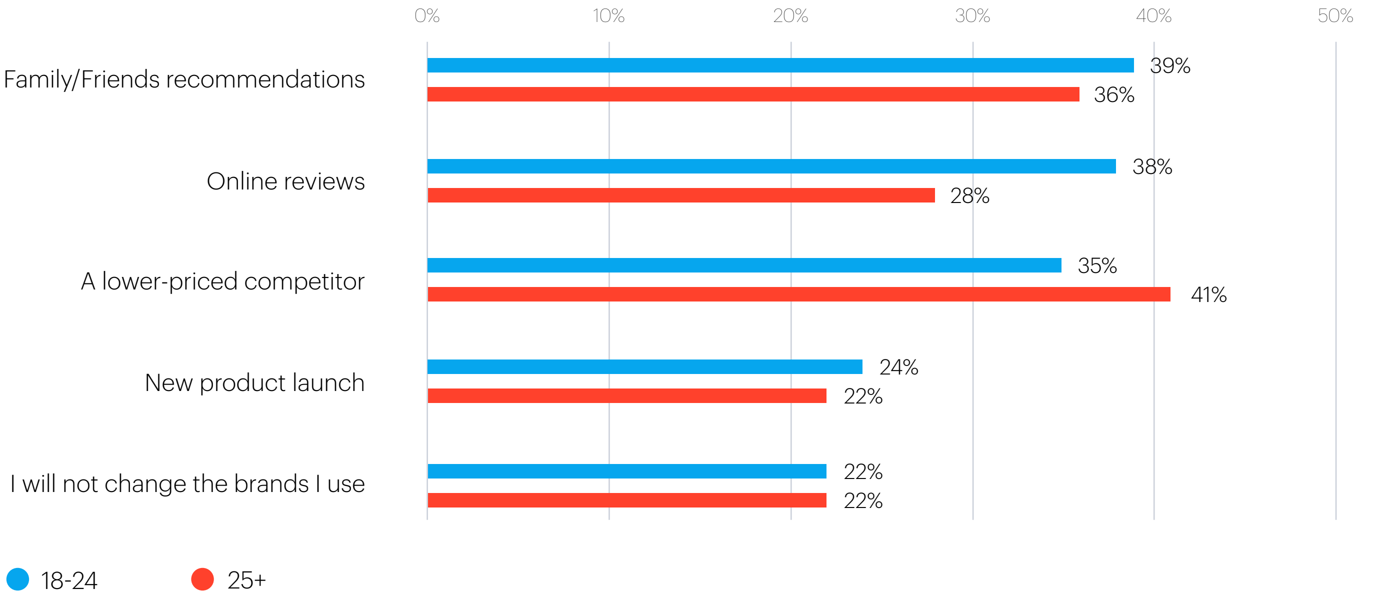
Singaporean Gen Zs and Italian Gen Zs are **10%** points more likely to be influenced by a vacation deal (**61%** and **59%** respectively) compared to **45%** of the Gen Z global total. Whereas Australians and German Gen Zs are less likely to be influenced by a vacation deal to drive destination choice.



Online reviews drive FMCG loyalty for Gen Zs

When looking at what would make Gen Zs change their loyalty to a FMCG brand, the power of recommendations from family and friends plays a key role with more than two thirds of global Gen Zs stating it as the most popular driver (**39%**), closely followed by online reviews (**38%**). In fact, Gen Zs are considerably more likely to cite online reviews as a key driver to lock in FMCG brand preference with a **10**-percentage point difference in the proportion of global Gen Zs stating online reviews (**38%**) compared to global over 25-year-olds (**28%**). Reaffirming the overwhelming power of real people's recommendations and reviews amongst this future traveler demographic.

Factors likely to encourage a change in brand loyalty to the products you purchase (Global)



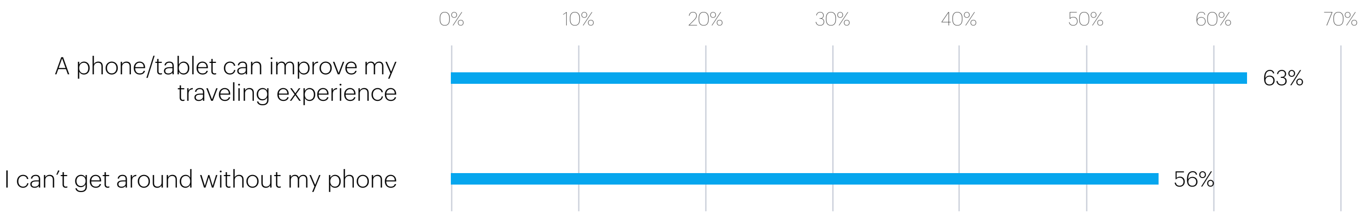
Q: Thinking about the FMCG products you purchase, what would make you change your brand loyalty?
YouGov Custom Research Jan '22

Tech at the heart of travel experience for Gen Zs

As we have highlighted earlier, social media plays a key role in the lives of these digital natives, and they are looking to people over travel marketers for authentic travel inspiration. So, it is no surprise that their mobile phone plays a key role for Gen Zs in enhancing their travel experience and offering seamless connectivity when traveling. As the first generation to be native of the digital world, more than six in ten global 18–24-year-olds agree that a phone/tablet enhances their travel experience (**63%**) and over half (**56%**) agree that they can't get around without their phone.

▶ LEARN MORE ABOUT OUR DATA

Mobile phone statements – Gen Z Net agreement (Global)



Q: Agreement with statements, YouGov Global Profiles March '22

This strong connection with their technology results in Gen Z being hyper-connected whilst on vacation. This allows them the flexibility to research trips/accommodation, compare prices, read reviews and book online, tailoring their vacation to their specific requirements and creating great vacation experiences that they will tend to share on social media. They are effectively taking on the role of travel agent in curating their own unique vacation.

Market insight

The very high device-reliance among Gen Z presents an array of opportunities for companies in the travel sector. Using technology will allow organizations to engage in different ways with Gen Zs across the whole travel experience, from consideration to in-destination, and post-trip.

Whilst targeting and engaging Gen Zs with online promotions in the planning and pre-trip phases is an obvious consideration, in-trip targeting through mobile and social media, providing local offers presents a valuable opportunity to deliver on the full travel experience. Another area of opportunity is post-trip options and retargeting, using promotions and loyalty schemes to help increase brand loyalty and advocacy.

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Section 3

How to engage and connect with the future Gen Z traveler

This section explores how Gen Zs interact with media, what they expect from advertising, the importance of social media in their lives, how they gather information for their travel decisions and if it is time for Gen Z to travel in the metaverse.

Social by name, social by nature

Social media has transformed the way consumers not only communicate with each other, but also how they interact with brands and advertising across the globe. The Gen Z cohort has never known a world without social media, and it has become an integral part of their everyday lives. YouGov GB Profiles shows that, **83%** of the GB population have consumed social media in the last month, increasing to almost nine in ten (**89%**) among Gen Zs. Younger generations are also driving growth for platforms such as YouTube and TikTok. In fact, among GB adults aged 18-24, YouTube monthly reach exploded from **12%** in 2020, to **66%** in 2022, overtaking Instagram for the first time. TikTok monthly penetration also grew from **27%** in 2020, to **42%** in 2022 among Gen Z adults.

▶ SPEAK TO A RESEARCHER

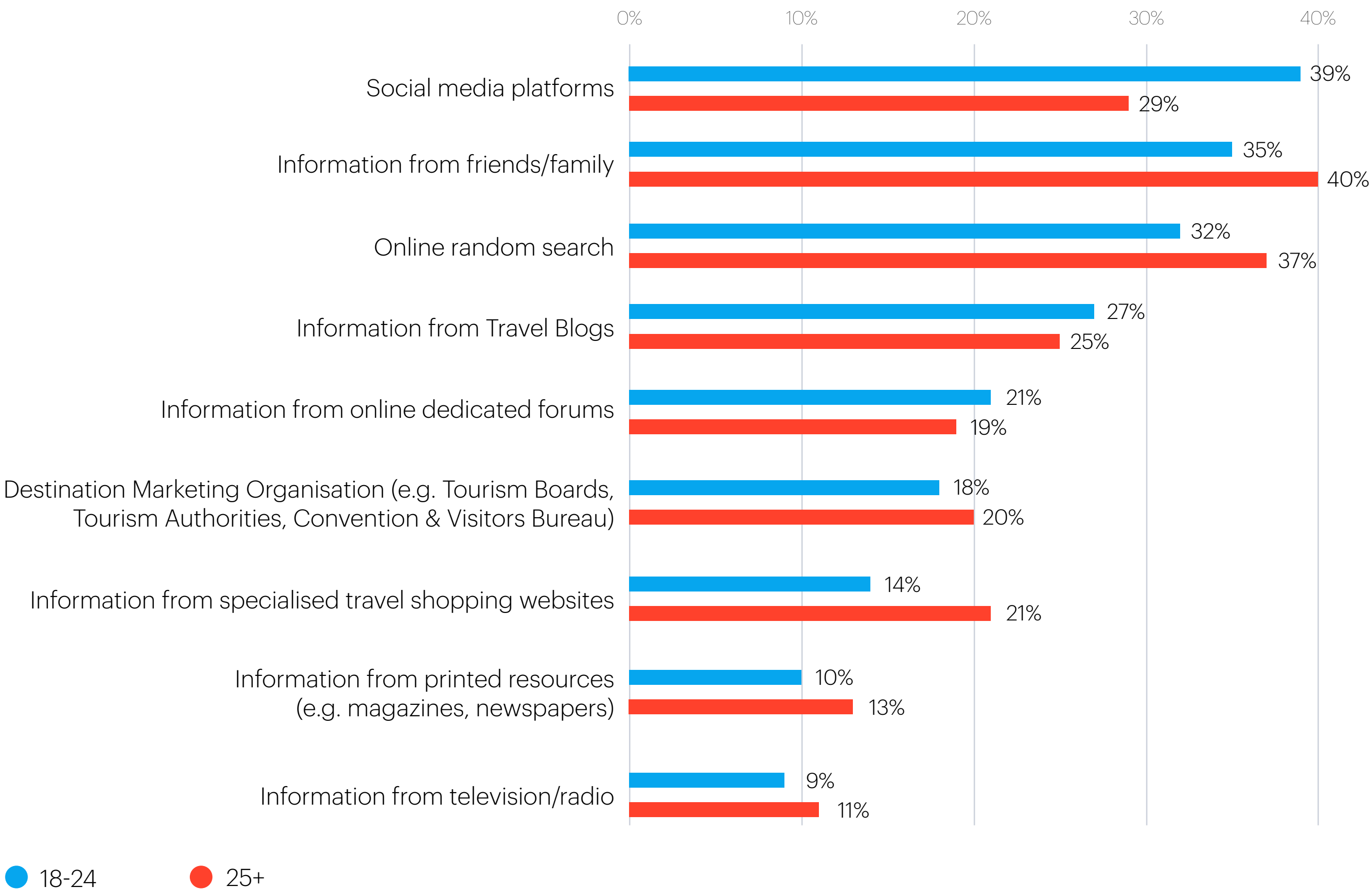
Use of social media networks last month by age (GB) , April '22

	Total GB	18-24	25-34	35-44	45-54	55+
Any social network	83%	89%	91%	90%	86%	75%
Facebook	66%	56%	68%	70%	69%	65%
Instagram	40%	66%	57%	50%	40%	24%
YouTube	36%	65%	62%	48%	34%	17%
Twitter	27%	42%	35%	34%	33%	16%
LinkedIn	16%	19%	25%	21%	18%	9%
Snapchat	13%	40%	24%	18%	10%	3%
TikTok	13%	55%	26%	14%	6%	2%
Pinterest	11%	17%	13%	11%	11%	8%
Reddit	8%	23%	19%	9%	5%	1%

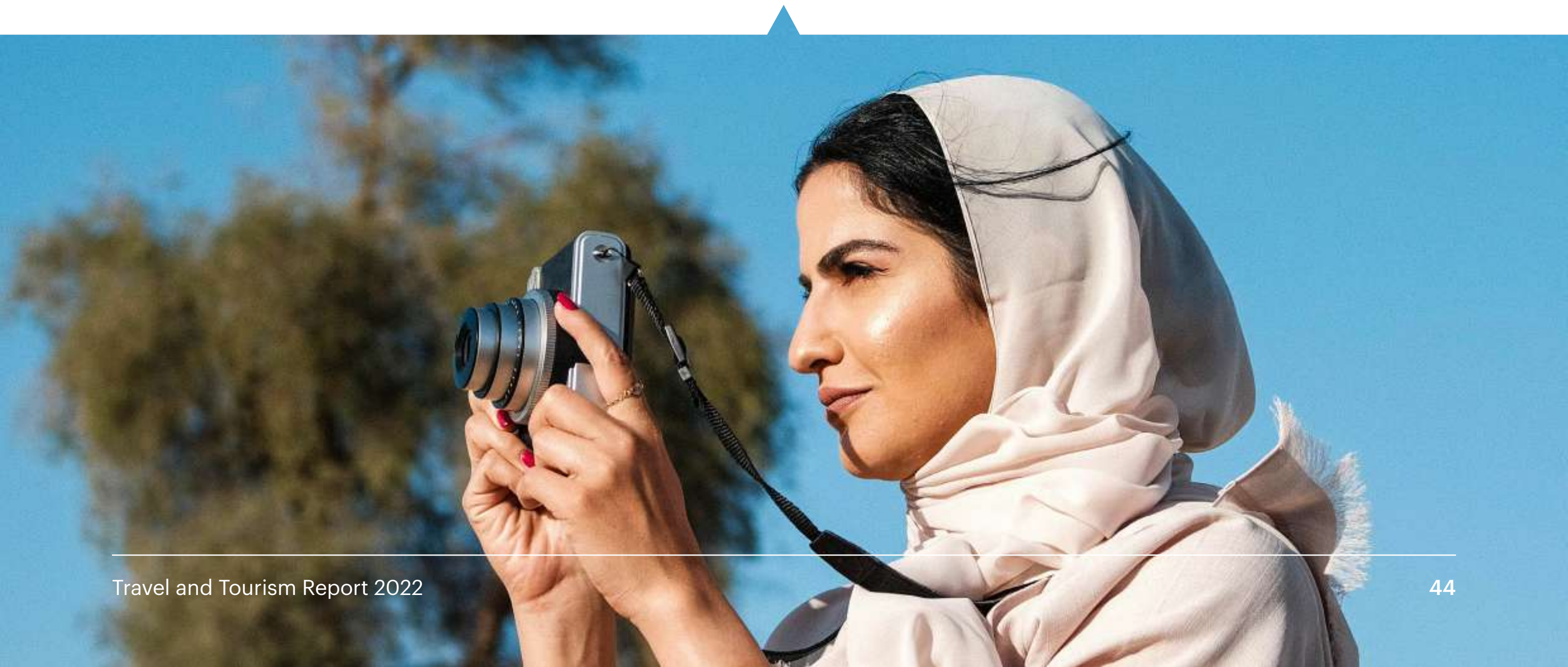
Q. Which, if any, of the following social networks have you used within the last month? YouGov GB Profiles April '22

The appetite for social media among Gen Z consumers continues to grow. YouGov Custom Research data shows that globally, almost four in ten (**39%**) of 18–24-year-olds intend to interact more with social media in the next 12 months. Social media consumption is least likely to increase among those aged **55+**, with only **12%** reporting an intention to increase their social media use. Social media is hugely important to Gen Zs. YouGov's GB Profiles data reveals that social media is the top source for accessing news among **40%** of 18-24s, compared to **24%** of adults aged 25+. Similarly, when planning a vacation, YouGov Global Travel Profiles data reveals that social media is the primary source accessed for information among almost **4** in ten (**39%**) 18–24-year-olds (compared to only **29%** among those aged **25+**), and even higher than recommendations from family and friends.

Methods used to help plan your vacation (Global)



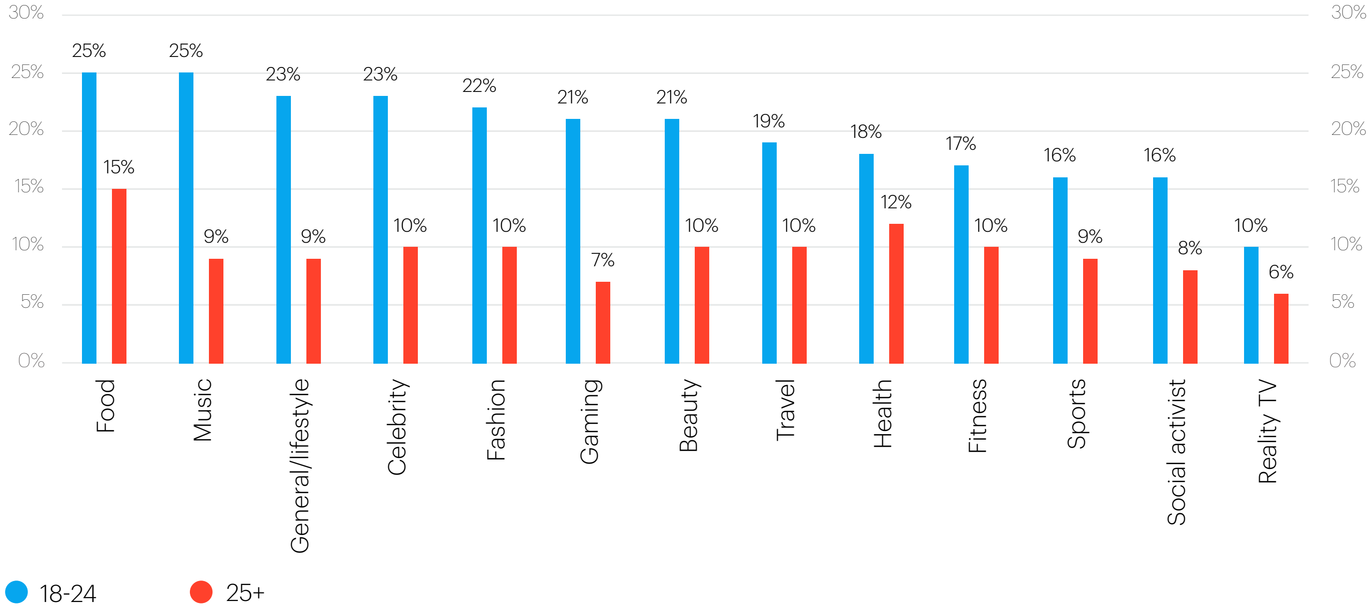
Q: Which if any of the following booking methods do you typically use when booking accommodation for vacations?
YouGov Global Travel Profiles April '22



Social media is evolving at pace, offering more entertaining and interactive ways of engaging users. Traditional text and picture-sharing features have evolved, with a greater focus on user-generated content, building experiences, and engagement and interaction with social media influencers.

YouGov Custom Research reveals that **88%** of global Gen Z consumers currently follow a social media influencer compared to less than half (**47%**) of adults aged 25+. Almost one in five global Gen Zs (**19%**) follow a travel influencer, and whilst registering lower appeal among Gen Zs compared to other influencer types, such as food, music, lifestyle, and gaming, they are twice as likely to follow travel influencers than those aged 25+. There is a high level of cross-over among the types of influencer Gen Zs follow, providing opportunities for travel brands to engage with other influencer types to target consumers aged 18-24.

Type of influencer followed by age (Global)



Q: What type of influencers do you follow on any social media accounts (e.g., Instagram, Twitter, TikTok, Facebook etc.)? YouGov Custom Research July '21

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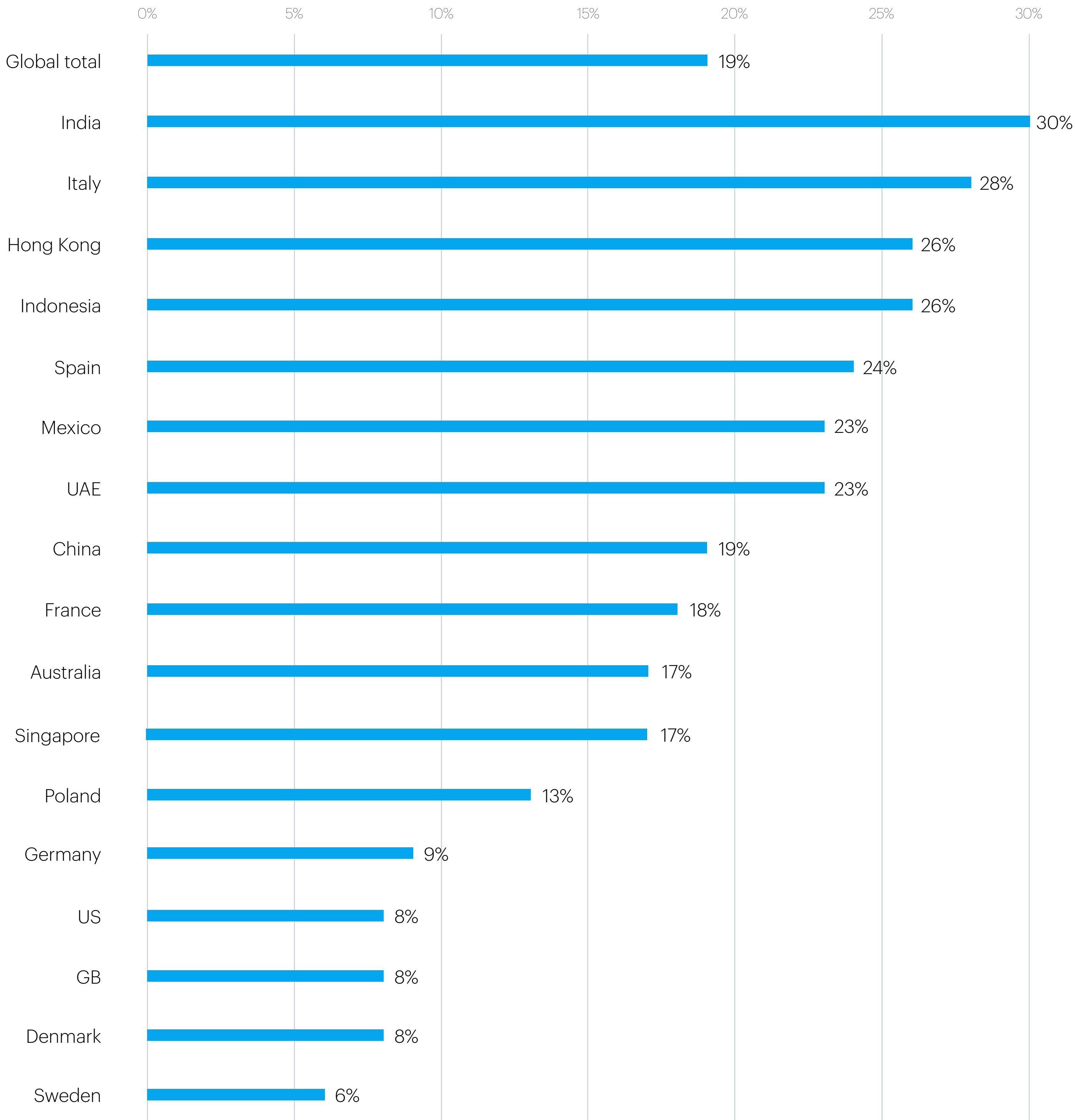
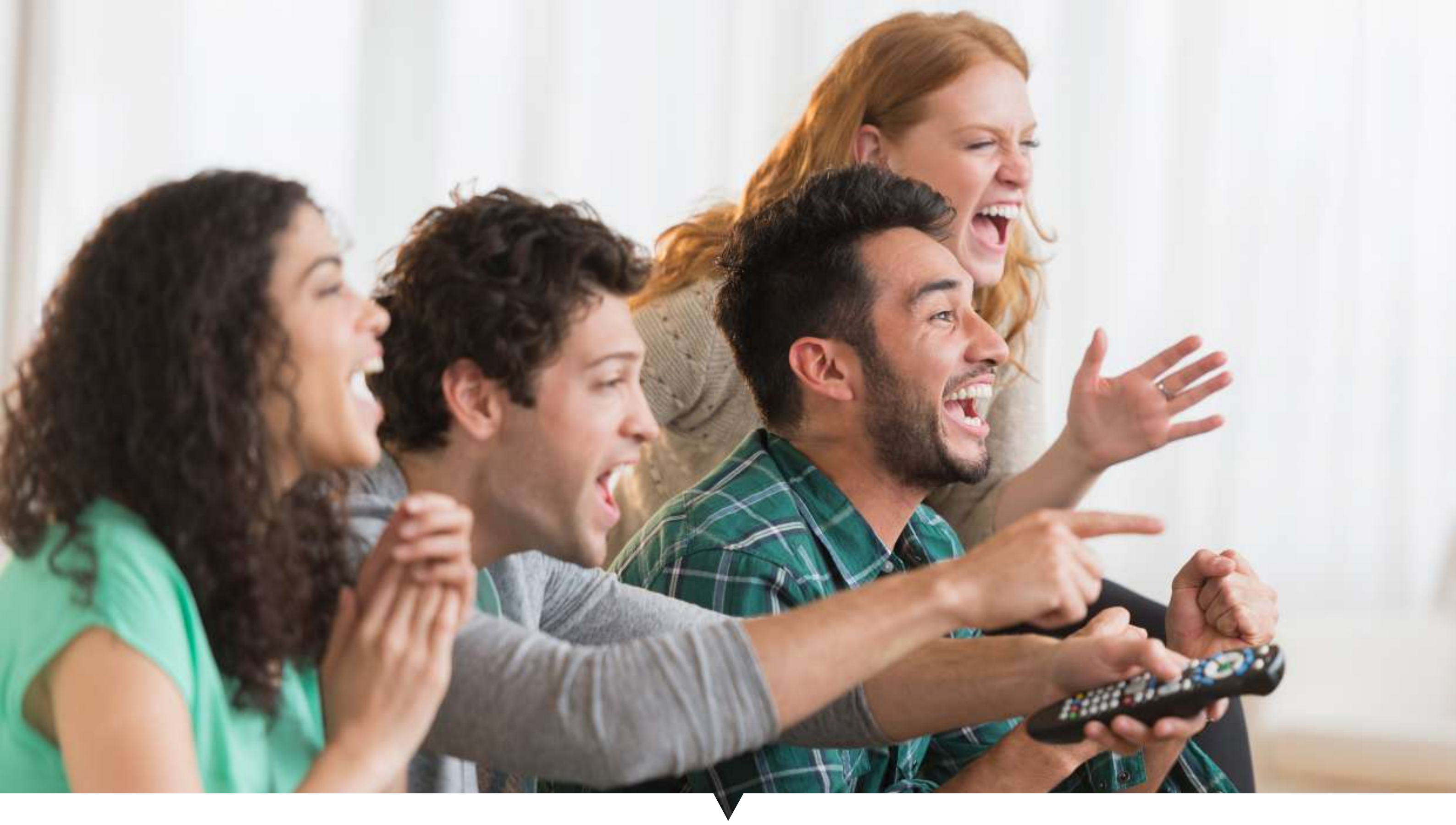
Looking at travel influencer followers by country, India registers the highest travel influencer follower penetration in Asia (**30%**), followed by Indonesia and Hong Kong (both **26%**). Italy and Spain, two of Europe's most popular travel destinations scored most highly in Europe with **28%** and **24%** respectively.

Travel influencers followed by country



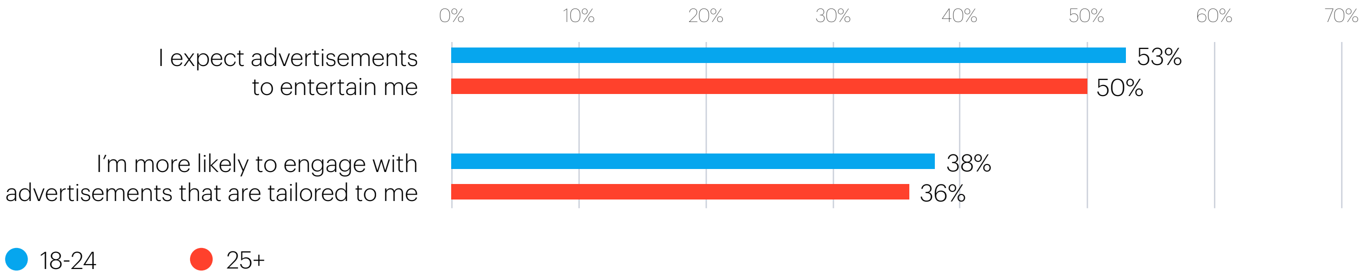
Q: What type of influencers do you follow (travel influencer) on any social media accounts (e.g., Instagram, Twitter, TikTok, Facebook etc.)? YouGov Custom Research July '21



Attitudes to advertising

Turning to receptiveness to advertising, global consumers aged 18-24 have high expectations from advertising, with over half (**53%**) agreeing that they expect advertising to entertain them, compared to **50%** of those aged 25+. In addition, they value personalization, with **38%** of global Gen Zs more likely to engage with advertisements that are tailored to them, compared to a lower proportion (**36%**) among adults aged 25+. Gen Z consumers are more likely to engage with brands and advertising that is relevant and entertaining, and if consumers enjoy the content and communications, they are more likely to respond to it positively.

Personalized and entertaining advertising statements by age – Net agreement (Global)



Q: Agreement with statements, YouGov Global Profiles March '22

Clearly Gen Z travelers are more receptive to advertising if it is relevant, in the right format and on the right platforms. Whilst 18–24-year-olds are avid users of social media, YouGov US Profiles data reveals that live TV consumers skew towards older generations – with **72%** of US adults aged 25+ claiming to watch live TV in the previous week, compared to less than half (**44%**) of those aged 18-24. Global Profiles data also shows that Gen Zs are more cynical about TV in general, with almost half (**47%**), agreeing that they don't trust advertising on TV compared to **39%** of those aged 25+. On the other hand, **34%** of Gen Z consumers agree that they are more likely to engage with advertisements on social media than on regular websites.

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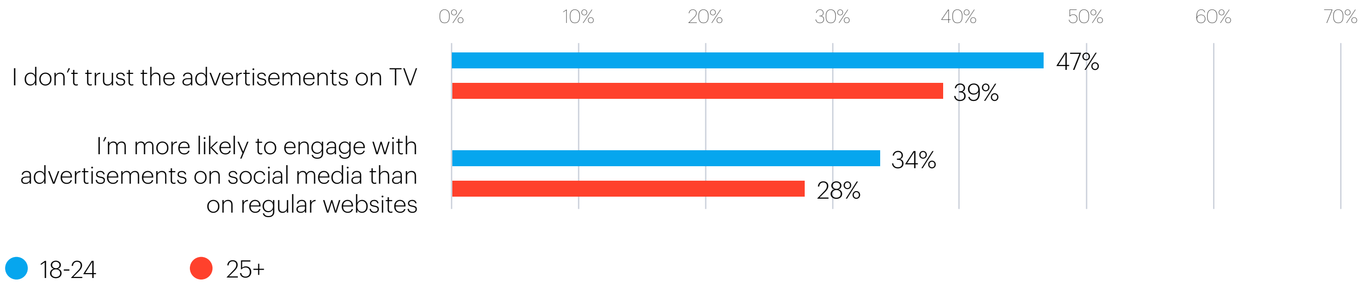
Social media engagement and trust in advertising statements by age – Net agreement (Global)



Q: Agreement with statements, YouGov Global Profiles March '22

High awareness of the metaverse among US and UK Gen Zs

Facebook is responsible for generating the buzz around metaverse, particularly since its rebrand to Meta in October 2021. The metaverse will change the way travelers interact with each other, the influencers they follow, and how they experience the brands that inspire them. But what is the metaverse? In its simplest terms, the metaverse is an interactive cloud-based virtual reality (VR) world you can connect and communicate with other people for play, business purposes, and new experiences for users donning VR headsets. The metaverse is the latest marketing and digital revolution that may well replace social media as we know it. Social media influencers are already looking into profiting within the metaverse, and it is likely that this collaboration will fuel the level of use and interaction with the metaverse.

The metaverse could be significant in connecting brands with the future traveler, and at present, awareness of the metaverse is high among US and UK consumers, and this is particularly true for Gen Z consumers. YouGov Direct Research reveals that **64%** of Gen Z Americans and **66%** of Brits aged 18-24s are aware of the Metaverse, compared to **54%** of US adults aged 25+ and **56%** of UK adults aged 25+. In fact, Gen Zs have a higher level of awareness in the metaverse in both the US and UK, than adults in any other age group.

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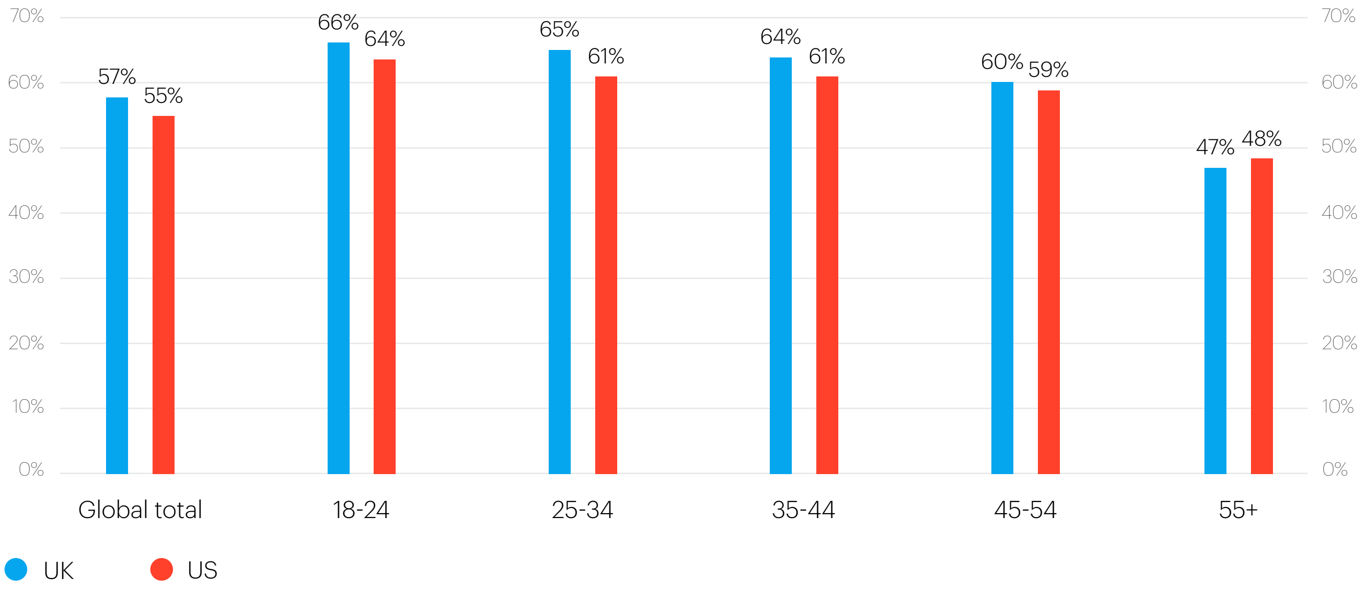
Awareness of the metaverse by age (US and UK)



Q: Have you ever heard of the Metaverse? YouGov Direct Feb '22

YouGov Direct

Award-winning, 24/7 rapid research tool. Get live access to real consumer opinions and new industry trends, with research results in 1 hour. Create a free account, build and launch your survey in 10 minutes, then slice your data for analysis, in one, easy-to-use platform. Reach an engaged, fully opt-in panel for rapid insights during meetings, idea testing, crisis management and more – monitoring survey impact with click-through rates.

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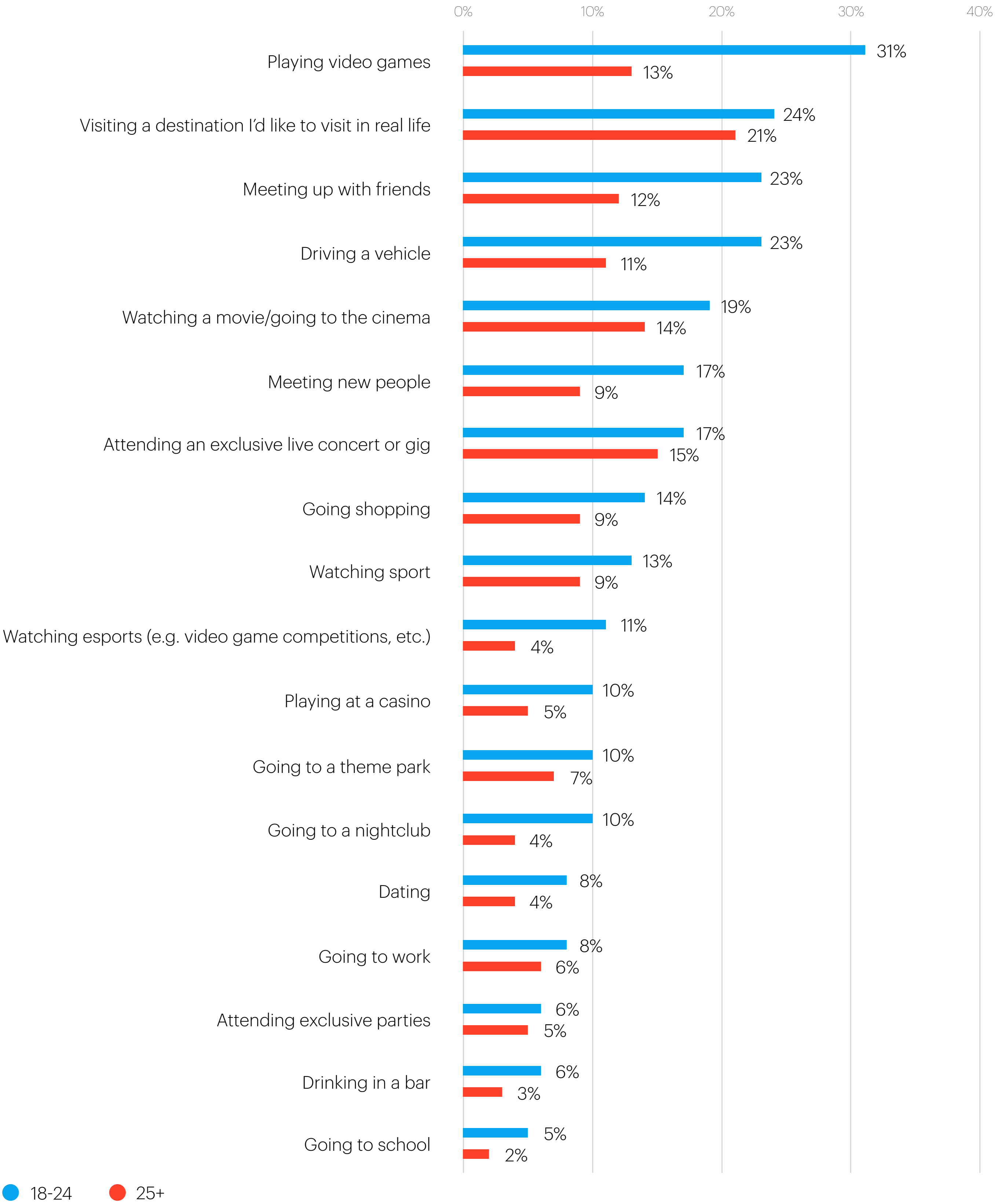
In general, adults aged 18-24, in both the US and UK, are the group that is most interested in experiencing almost all activities and potential experiences in the metaverse, compared to adults aged 25+.

Activities interested in experiencing in the metaverse (UK)



Q. The metaverse allows you to travel and experience other parts of the world without leaving your current real-world location. Which, if any, of the following would you be interested in doing in the metaverse? YouGov Direct Feb '22

Although many position the metaverse as the new way to experience gaming, it's an environment that presents opportunities for so much more. In the UK, whilst playing video games scored most highly among Gen Zs (**31%**), one of the most obvious benefits of the metaverse is the possibility of experiencing any destination in the world without leaving the sofa. The metaverse enables travelers to explore a destination in detail, helping them decide which hotels and local restaurants to book, and where to visit when they get there. This explains why "Visiting a destination I'd like to visit", is the second most popular area of interest in the metaverse (**24%**), followed by meeting friends (**23%**). In the US, gaming also ranks highest among 18–24-year-olds (**25%**), closely followed by social activities such as meeting friends (**23%**) and meeting new people (**22%**). Visiting a destination I'd like to go to in real life, ranks fourth (**18%**).

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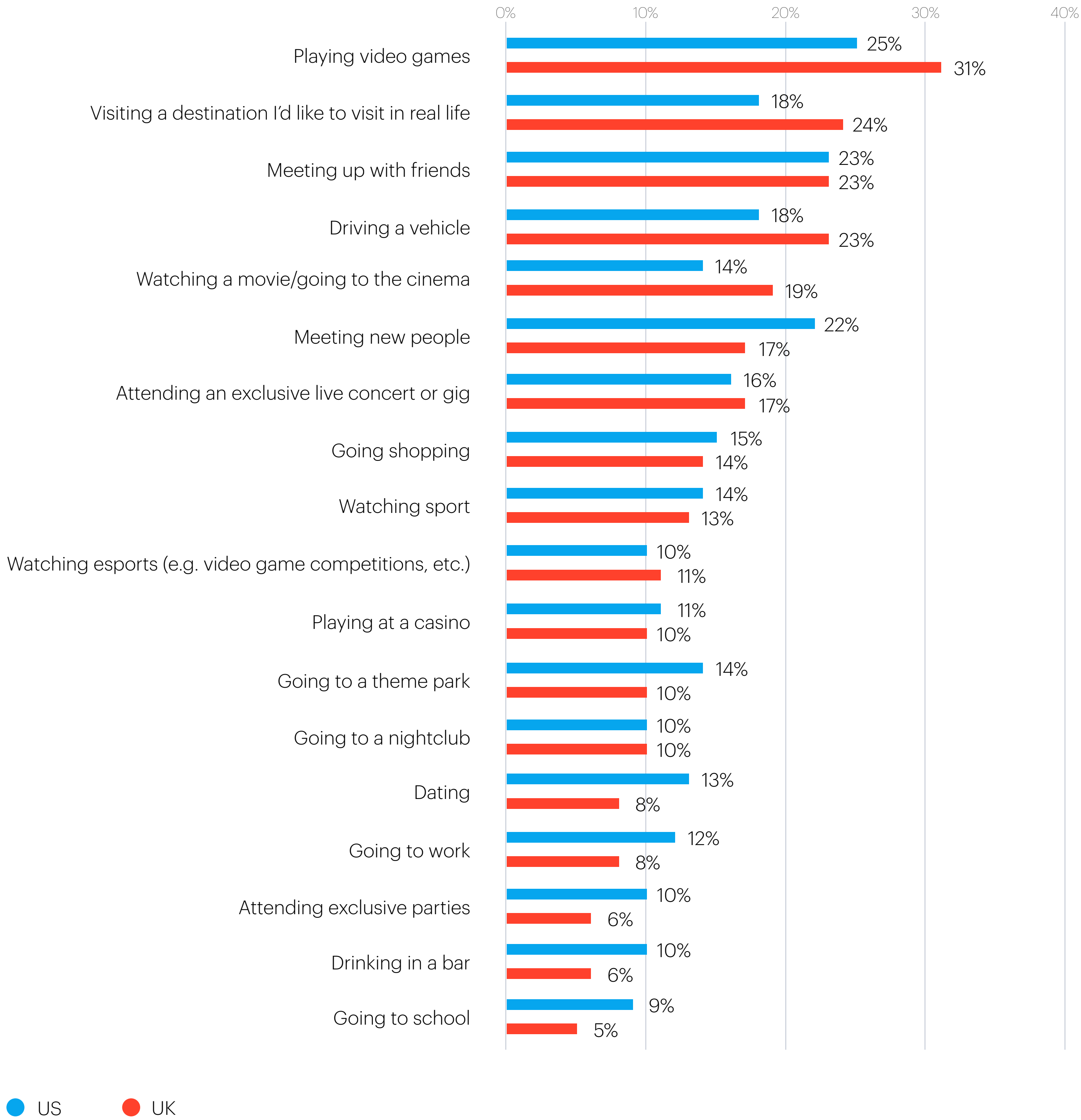
Activities interested in experiencing in the metaverse among Gen Zs (UK and US)



Q. The metaverse allows you to travel and experience other parts of the world without leaving your current real-world location. Which, if any, of the following would you be interested in doing in the metaverse? YouGov Direct Feb '22

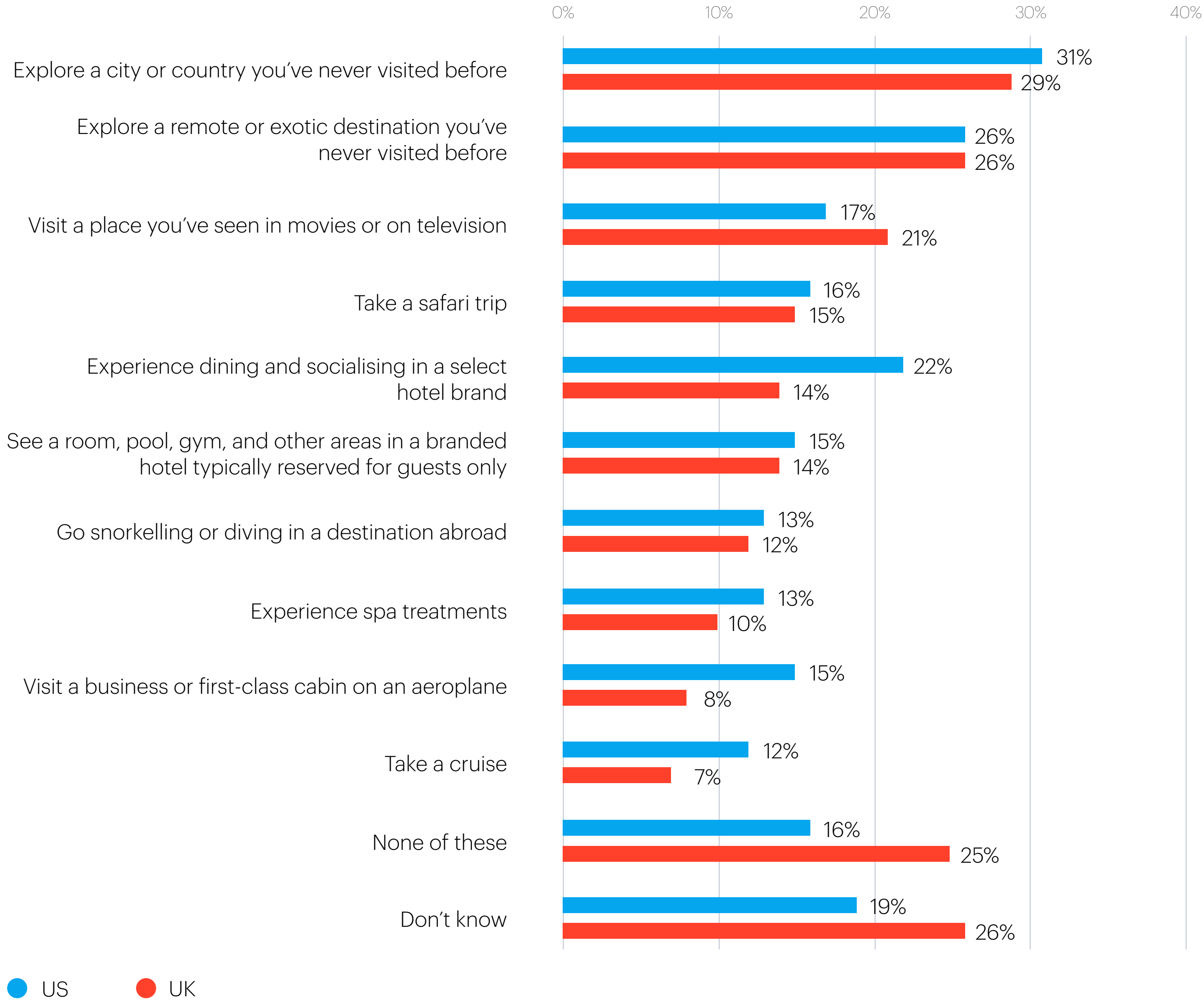
Many activities with high interpersonal social involvement ranked low among both UK and US Gen Zs, such as dating, going to a night club, and drinking in a bar. Although these activities are possible in the metaverse, they are emotional, and personal activities that involve a 'human connection'.

Several brands including McDonalds, Coke, Gucci, and Dolce & Gabbana are already seriously investing in the metaverse, but more recently travel brands like Marriott International and Qatar Airways are beginning to embrace the metaverse exploring new forms of marketing and new ways to offer better virtual experiences that can provide inspiration for tourists before embarking on their physical trip.

Three in ten US and UK Gen Zs are interested in exploring a new city in the metaverse

When we look at specific travel experiences they are interested in, YouGov Custom Research data explores which travel-related activities generate most interest in the metaverse among 18-24s in the UK and the US. In both markets, Gen Z consumers are most interested in 'Exploring a city or country never visited' (**31%** US and **29%** UK) and experiencing 'Exploring remote or exotic destination' (**26%** in both the US and UK).

Travel activities interested in experiences in the metaverse among Gen Zs (UK and US)



Q. The metaverse allows you to travel and experience other parts of the world without leaving your current real-world location. Which, if any, of the following would you be interested in doing in the metaverse? YouGov Direct Feb '22

American Gen Zs are more likely than their UK counterparts to be inspired by 'Experiencing dining and socializing in a select hotel brand' (**22%** US vs. **14%** UK). Significantly, in the US, more Gen Z consumers are open to experiencing 'Dining and socializing in a select hotel brand' and 'Visiting a business or first-class cabin on an airplane' than adults in any other age category. This data highlights significant opportunities for hotel brands, airlines, tourism boards and travel agencies looking to capitalize on the benefits of metaverse marketing.

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Conclusion - Market insights

This report set out to understand attitudes towards travel among the most fluid and digitally engaged generation to date. The results show some degree of variance in preferences, and an overall sense of a generation in a continued state of becoming. Gen Zs are a unique group of individuals, raised in a world where connectivity and the internet are a given and for whom physical and digital life intersect like never before.

As young adults in Gen Z grow up and join the workforce, start earning steady salaries and having disposable income, their preferences and attitudes will consolidate over time. For marketers in the travel sector, it is very important to understand how this generation responds to different levers such as price and brand purpose, in order to maximize their investment efforts around what matters most to Gen Zs.

In particular for marketers, it will be absolutely necessary to understand how to engage with this cohort of travelers. They are social, they want to be entertained, and expect personalization and tailored unique offerings. Building strong and positive brand associations is a long-term effort, and with Gen Zs, the time to start is now.

To cater for a generation for which the only constant is change, it is vital for marketers to keep engaging with Gen Zs through constant monitoring and generation brand tracking.

Methodology

For this study we connected research from our syndicated solutions including, **YouGov Global Travel Profiles**, **YouGov Global Profiles**, and **YouGov BrandIndex** whilst also leveraging **YouGov Custom Research**.

The data from **Global Travel Profiles** used in this study is based on the interviews of **25,918** adults aged 18 and over across **25** countries in April 2022. All interviews were conducted online and the results are nationally representative. The countries in the poll include Australia, France, Germany, India, the UK, the US, China, Sweden, Indonesia, Canada, Spain, United Arab Emirates, Denmark, Italy, Singapore, Thailand, Japan, Malaysia, Norway, Kingdom of Saudi Arabia, Finland, Brazil, Egypt, Mexico, and the Philippines.

Global Profiles tracks **1,000+** questions in **43** major markets, offering the largest globally consistent audience dataset. Sample sizes in Global Profiles vary for each market, however we endeavour to have a minimum of c. **1000** per market, and in many larger markets we will have a larger sample. Data was collected in April 2022.

YouGov BrandIndex measures brand health, from thousands of consumer interviews every day across **54** markets. The data utilised in this study is from the UK, collected in April 2022.

The **Custom Research** leveraged in this study covered a number of bespoke travel questions conducted across **17** markets. These were fielded between 16th November 2021 and 12th December 2021, in the below markets.

Market	Sample size	Sample type
Australia	1,029	Nat Rep
China	1,029	Online Rep
Denmark	1,015	Nat Rep
France	1,036	Nat Rep
Germany	1,054	Nat Rep
Hong Kong	511	Online Rep
India	1,011	National Urban Rep
Indonesia	1,033	Online Rep
Italy	1,030	Nat Rep
Mexico	1,121	Nat Rep (with urban bias)
Poland	1,009	Nat Rep
Singapore	1,062	Nat Rep
Spain	1,026	Nat Rep
Sweden	1,016	Nat Rep
UAE	1,275	Nat Rep
GB	2,026	Nat Rep
US	2,628	Nat Rep

Additionally, **YouGov Omnibus** data was collected for this study from a nationally representative sample of 13,375 adults in **8** markets between 21st March and 30th March 2022. The markets included and sample sizes are as follows: UK (2,078), US (2,819), France (1,115), Germany (1,926), India (1,027), Indonesia (2,224), Philippines (1,112), and Australia (1,074).

We additionally collected data to support the study via **YouGov Realtime** across a sample size of 2,278 adults in the US between 18th March and 23rd March 2022, as well as across a sample size of 2,052 adults in the UK between February 25th and February 28th 2022. Both surveys were carried out online and have been weighted to be representative of all UK and US adults accordingly.

If you have questions about any specific question or the data used in this report, please **get in touch**.

Thank you

YouGov is an international research, data and analytics group. We have been building an ever-growing source of consumer data for over **20** years, creating the richest and most complete understanding of your customers' complex lives. We call it living data. Understand what **20 million+** registered panel members in over 55 markets are thinking, on over a million - and growing - data points. Re-Contact and dig deeper to explore, plan, activate and track marketing activity with certainty, at speed, every time. Living Consumer Intelligence.

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