

Gen Z Traveler Profile

Exploratory Research



Executive summary

Overview

GOAL

This research explores how Gen Z travelers plan and shop for lodging, uncovering generational drivers, tool usage, and gaps between traveler expectations and current OTA experiences.

METHOD

In-depth interviews

Key Findings

- Gen Z travelers are decisive, strongly driven by personal intent and prioritize visual thinking in their travel planning and shopping process.
- Gen Z travelers expect personalization in their digital experiences and seek precise and tailored answers rather than broad, generic information.
- Gen Z travelers use apps on their mobile phones for trip inspiration planning but most of the shopping exploration takes place on desktop/laptop.
- Decision related to lodging shopping for leisure trips are primarily and heavily driven by price and affordability as compared to convenience of location for older generations.

Key Recommendations

- The integration of Gen AI on OTA platforms can simplify and optimize travel planning and shopping process by offering tailored results to precise queries aiding in quicker and more confident decision-making.
- Redefining content presentation on SRP and PDP in compartmentalized, bite-sized chunks will prioritize visual thinking aiding in better recognition and recall.
- Empower Gen Z travelers with fast, intuitive personalization through an elevated filters experience.

Overview

Background

What

- Different generations have distinct travel habits and preferences, which can significantly impact how they plan, search, shop, and book trips, especially lodging.
- As a precursor to the Search Vision work, it was agreed by the team that a deeper understanding of similarities and differences in the general travel planning and shopping behavior of travelers across generations could be helpful in informing the concept design and plan

Goals

Why

- Understand how Gen Zs get inspired for their leisure trip and plan and research these trips
- Identify key motivators and factors influencing decision-making for Gen Z travelers when shopping for lodging
- Compare how these behaviors differ across generations
- Evaluate the current digital trip planning and lodging shopping process and identify gaps in the process

Method

How

- 60-minute semi-structured moderated interviews on Dscout.
- Show and tell approach where the traveler walked the moderator and observers through their organic planning and shopping process by sharing their screens.
- N= 9 Gen Z (18-27 years old) travelers (in USA) who take at least 2-3 leisure trips a year and enjoyed a leisure trip in the past 3 months where they stayed in paid lodging for 2 or more nights.

Acronyms

- CL – Conventional Lodging (e.g hotels, resorts)
- OTA – Online Travel Agency (e.g.Expedia, Vrbo, Hotels.com)
- SRP – Search Results Page
- PDP – Property Details Page
- VR – Vacation Rentals

Demographic Observations

Generalized findings

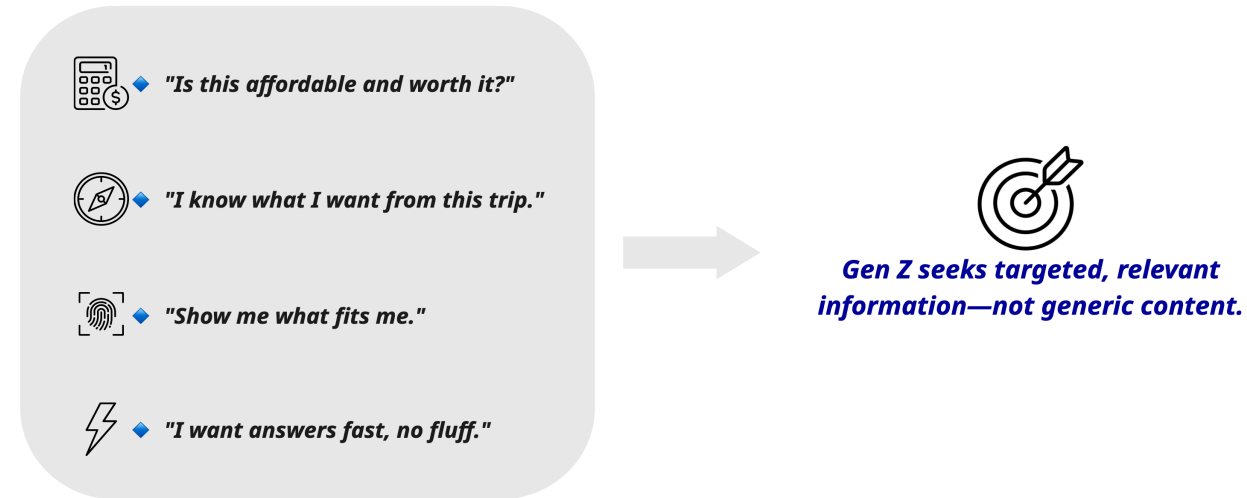
Demographic Observations

- Gen Z travelers are decisive and strongly **driven by personal intent**.
 - A **vivid mental image** of what they want from the trip
 - **Clarity** in what they are seeking online when planning & shopping
 - Each trip is an opportunity to achieve or experience something – on their bucket list or a new unexpected yet delightful experience.
- Immersed in digital devices from birth makes Gen Zs **swiftly multi-task** between apps and websites while consuming and retaining information with **great precision and recall**.
 - The observed multitasking was between apps and websites related to travel and not juggling multiple tasks at once.
- **Content** is preferred in a format that is:
 - Both **textual** and **visual**
 - Consumed as is without having to break, parse and digest – **bite sized**
 - **Engaging** (of image and videos)
 - Helps decide the **relevance** of the item to their goals and intent



Demographic Observations

- **Clarity** in intent + **Practical** Motivator (e.g. Price) + Need for **Speed** + Predisposition to **Personalization** = **Precise, tailored answers** over broad, generic information.
- Gen Zs are habituated to—and thus seek—personalized content in all their digital tasks and activities. This could be attributed to the high exposure and usage of social media that has set the bar for personalization very high.
- "People Like Me" is the New Authority.
 - GenZs seek content and advice from people who reflect their interests, values, and identity—whether peers online or friends in real life.
 - They value relatable voices over traditional sources of expertise.*
 - In their mental model, authenticity = credibility.**



*A micro-influencer's review, a friend's story on Instagram, or a Reddit post by a similar traveler type carries more weight than official travel blogs or marketing content.

**Especially when it comes from someone who shares their age and lifestyle, budget, or travel style.

Demographic Observations compared to other Generations

Generation	Mental Model	Trusted Sources
Gen Z (1997-2012)	“What are people like me doing?”	UGC, peers, social media (TikTok, IG) influencers
Millennials (1981-1996)	“What’s popular and trending?”	Reviews, blogs, travel forums
Gen X (1965-1980)	“What’s proven to work?”	Brand trust, professional sources
Boomers (1946-1964)	“What’s reliable and safe?”	Established travel agents, guidebooks

Note: These insights are taken from research on shopping behaviors and patterns observed across studies published in the EG Archive and on secondary research material available on the internet (Slide 59, 60)

Trip Inspiration

Social media on mobile

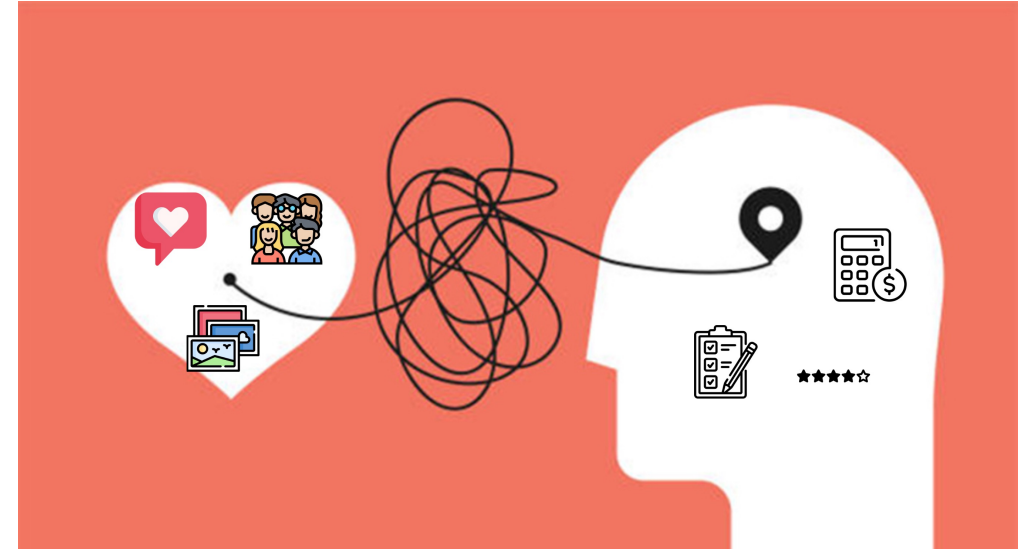
Gen Z travelers are perpetually online and are bombarded with a constant influx of personalized travel related to information on their mobile phones

- Social media, especially **short form content on TikTok** and **Instagram**, are the primary source of travel inspiration for **Gen Z** travelers.
 - A [report](#) indicates that 88% of Gen Z consumers follow at least one travel influencer on TikTok.
 - For **millennials**, the reliance for travel inspiration on social media is heavy with platforms like **Instagram** and **YouTube**, but less pronounced compared to Gen Z.
 - The influence weakens further for **Gen X** and **Boomers** who use a mix of **traditional sources** and **online platforms** (Facebook groups, travel forums).
- Inspiration does not typically mean planning a trip for Gen Z travelers, who tend to file the information away in retrievable buckets on a platform of their choice or as mental notes.
 - Gen Z travelers acknowledged that they do **not have established organization** habits outside of on-site saving/bookmarking for these fleeting information bits.
 - Older travelers (inc. millennials) tend to favor more structured and organized approaches to travel planning.



Feeling a connection with the information source influences more abstract and less rational aspects of decision making

- **Personalized** content in the **organic** feed presenting raw and **real experiences** of **similar travelers** across the globe helps build engagement and trust in the source.
- Gen Z are more *feeling than investigative* than millennials or Gen X travelers.
- Pictures and videos allow Gen Z travelers to **envision** themselves in the trip, **feel a connection** to the presented content and content creator, and anticipate the **vibe** of the destination and the trip overall.
- Recommendation from friends (**someone with a shared context**) is another important source of inspiration for Gen Z travelers.
- Gen Z travelers are habituated to—and thus seek—intent and personalized experience in all their interactions online.
 - When faced with information that is not personalized or tailored to them, these travelers tend to identify and capitalize on **customization options from the get-go**. (e.g. usage of filters on OTA)



Trip Planning

Search-based planning on mobile and web

Gen Z travelers often have a strong and clear intent that drives leisure travel planning and shopping

- From the perspectives of a Gen Z traveler, a leisure trip can be broadly classified into one of the three intents :

Relaxation driven

- Beach trips
- Resorts, all-inclusive properties
- Property is an important part of the experience
 - Experiential amenities like spas, pools, on-sites restaurants etc. are important

Exploration driven

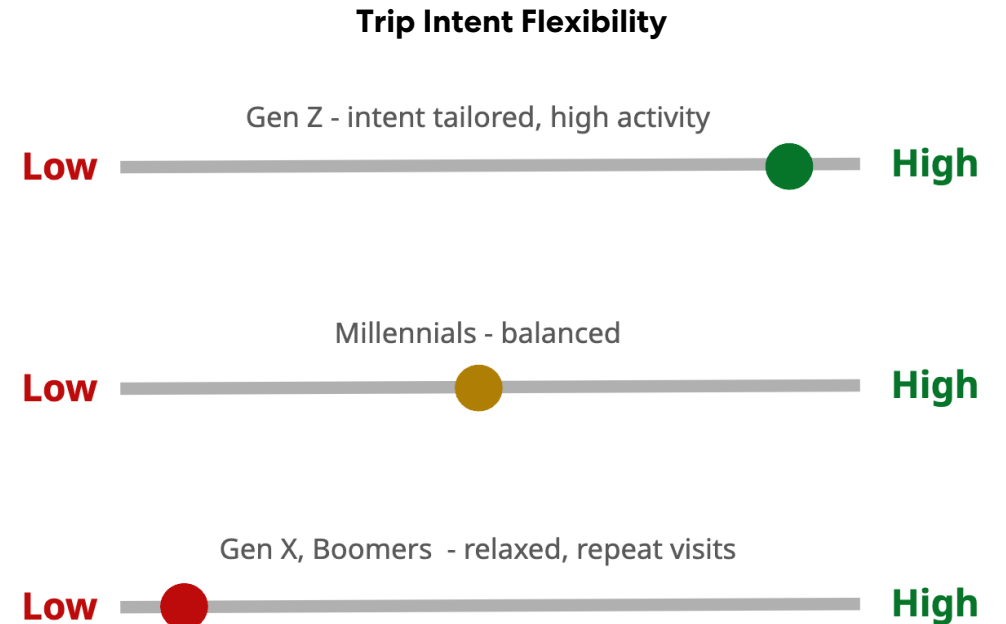
- Cities, international destinations
- No downtime is preferred – itinerary packed with experiences and places to visit
- Immerse culturally like a local
- Safety is a big concern, especially for female travelers
- Lodging is a place to crash
- Price is more important than lodging location
- Basic amenities like free wifi, breakfast and parking are sought out

Activity or Interest driven

- Gen Z are more likely to take an activity or interest-based trip than older generations
- Trip intent is centered around key activity (e.g. a concert), supplemented with other activities or interests that the destination caters to (e.g. thrift shopping, food, hike etc.)
- Lodging is a place to crash
- Safety is a big concern, especial for female travelers
- Basic amenities like free wifi, breakfast and parking are sought out

Gen Z doesn't do “we'll come back next time”

- Gen Z travelers have a higher confidence in their trip intent and what they want out of the trip, as compared to millennials.
 - This aligns with their "once-in-a-lifetime" travel psychology: *if they're going somewhere far or expensive, they want to make it count.*
 - This also means a do-it-all now approach – packing their **itinerary** to include everything **they are interested in**.
 - According to a 2024 report by StudentUniverse, nearly 76% of Gen Z travelers say they want to experience as much as possible during a trip.
- Gen Z travelers are also less likely to return to destinations as compared to older generations.
 - Millennials strike a middle ground of revisiting favorites especially with family and friends but also look for new destinations when possible.
 - Gen X and Boomers are more likely to **return to places they love**, especially for convenience, familiarity, and slower-paced travel (often in retirement).



For Gen Z, planning a trip is less about ticking boxes and more about curating a vibe

- The free spirit of the Gen Z travelers is also reflected in their choice and adoption of new and off beat options in their trip destinations, itinerary planning and choice of travel apps.
- In their itinerary planning and research phase, Gen Z travelers value:
 - A balance in exploration between **trendy and must-do activities as well as hidden gems**.
 - Well-rounded knowledge of **what's available to avoid surprises** in-trip
 - Understanding of the "**vibe**" to judge ***if it's for me or not***
- This planning is facilitated through - UGC, visuals (images and videos) - sought across and verified on a variety of apps and websites.
- The intense **personalization** conditioning through social media combined with a higher **tech adoption** propensity empowers UGC travelers to explore more offbeat travel apps (e.g. Stippl, Wanderlove) when planning itineraries.
 - The high level of **step-by-step customization** allows Gen Z to bring in the information, accumulated across platforms, in one place and curate a highly ***tailored itinerary*** for them. Like a minecraft experience.



Photo by [Mika Baumeister](#) on [Unsplash](#)

Gen Z travelers prefer 5–7 night-long leisure trips and tend to plan their leisure trips 1–2 months in advance (1/2)

- In addition to providing inspiration for *where* to go, social media content also helps travelers understand the best times *for them* to go to these places.
- Best time to go to a destination is influenced by:
 - Weather (critical)
 - Seasonality
 - Peak season (pricier but more people, better social experience)
 - Off season (cost-effective, quieter)
 - Personal & professional commitments
- Travelers, however, do **not solely rely on social media** to determine the best time to go. They use the following apps to make that decision:
 - **Google** search: Gemini overview, multiple blogs and articles sharing a broader perspective
 - **ChatGPT**: targeted data-backed answers tailored to one's personal requirements shared in the prompt
 - **Reddit**: real experiences of travelers shared with context
 - **Tripadvisor**: lots of honest reviews, all relevant information consolidated in one place.

Best time to visit Puerto Rico



Gen Z travelers prefer 5–7 night-long leisure trips and tend to plan their leisure trips 1–2 months in advance (2/2)

- Trip planning or research revolves around:
 - Deciding **where to go**: social media, word of mouth, promotional emails
 - Deciding **when to go**: Google search, ChatGPT, UGC on Reddit, TikTok
 - **Itinerary** planning: ChatGPT, Tripadvisor, YouTube, TikTok, Reddit, Google Search
 - **Estimating cost** of big trip items (air, lodging): Google flights, Hotels search on Google, Airbnb
- Gen Z travelers typically prefer leisure trips lasting 5 to 7 nights for domestic travel and 10 to 14 nights for international travel.
 - This duration allows them **sufficient time to engage** in desired activities and fulfill their travel objectives, ensuring a satisfying and well-rounded experience.
- For most Gen Z travelers, trip planning and research is a **decentralized process** that involves multiple digital touchpoints. They utilize **social media apps** on mobile devices alongside **search engines, user-generated content (UGC) platforms, and generative AI websites** on laptops or desktops to gather travel information and make informed decisions.

"Usually, it would be a week or a week and a half. The longest has been two weeks. When I'm going somewhere farther away like Europe, and the cost of the flight, it makes more sense to just stay longer and see more. It's worth your money. So there's so much to see, so a week and a half is probably my ideal. I like to stay for two weeks if I can. But when I do trips in America or like Puerto Rico, somewhere tropical, it's usually a week."

Spontaneity in travel planning is not off the table but brings with itself the added burden of navigating cost and budget logistics

- Spontaneity in travel experiences is driven by:
 - Burn out at work or university
 - Stumbling upon a lucrative deal or offer online
- **Spontaneous** trips are typically defined by approximately booking big trip items **a week or two in advance**.
- The added onus of **finding cost-effective [big] trip items** like lodging and flights within a limited time frame acts as a major deterrent to spontaneous trips.
- Other deterrents include:
 - Lack of time off from work, university
 - Co-ordinating across schedules of friends
 - Planning an itinerary that maximizes the experience within the boundaries of time and budget

"Sometimes I will do spontaneous trip. If I can work remote and I get a cheap flight alert, I will book spontaneously.

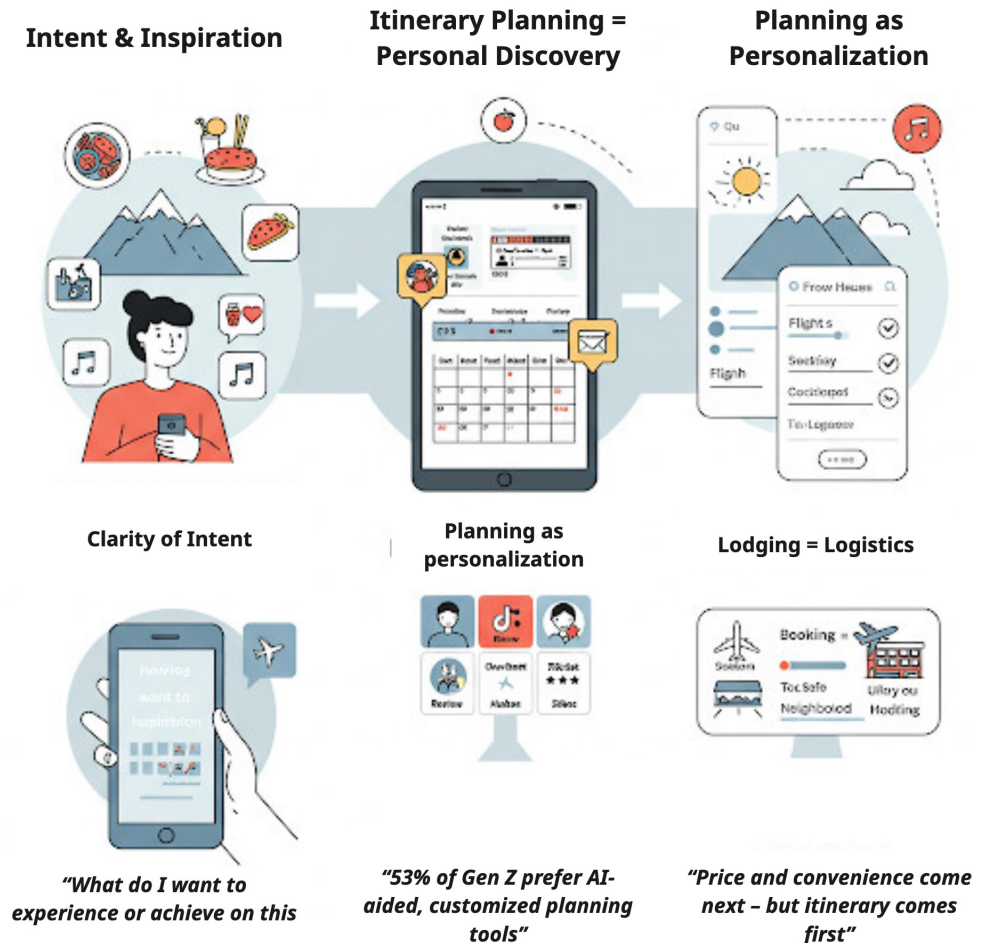
...

Like the NewYork trip, we planned very late. And, had a hard time finding something [lodging] in our budget and in the location we liked. We checked a lot of websites and spent a lot of time doing that."

Tailored itinerary planning while conducting trip research is more important to Gen Z travelers than other older generations [1/2]

- A [study](#) indicates that 53% of Gen Z travelers prefer personalized travel planning aided by AI tools, reflecting their desire for tailored itineraries.
- Strongly driven by intent and clarity in what the trip means to them, Gen Z travelers tend to spend time researching and creating a tentative itinerary before starting to investigate big trip items (air and lodging).
- Itinerary planning becomes a more engaging and enjoyable experience when recommendations are framed through a **"people like me"** perspective, highlighting activities that align with personal interests and preferences.
 - Not as relevant when shopping for flights or lodging
 - Lodging decisions are driven strongly by logistical and practical factors - price/budget, safety and convenience. While safety is gauged by "people like me" references, the other two tend to be personal.

Gen Z Trip Blueprint



Tailored itinerary planning while conducting trip research is more important to Gen Z travelers than other older generations [2/2]

- The best recommendations during itinerary planning for Gen Z travelers are aligned with the trip intent and a balanced combination of:
 - Popular, touristy activities
 - Hidden gems, authentic immersion
 - Things I typically love or prefer
 - Something new
- Itinerary planning gives travelers a vivid idea of the different locations and neighborhoods of interest, guiding their lodging shopping process.



For Gen Z travelers, visuals are the gateway, but user-generated content seals the decision [1/2]

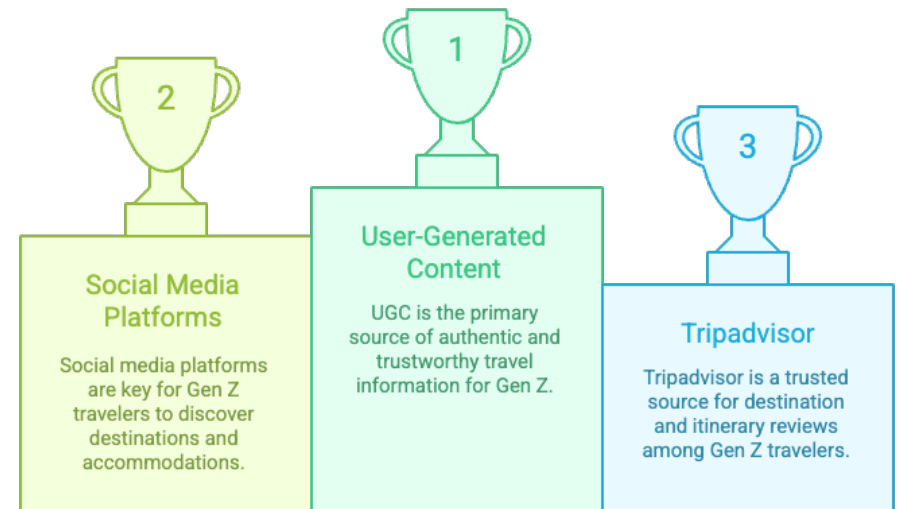
- Gen Z shows a strong inclination toward **concise, bite-sized content**.
 - This preference aligns with their fast-paced, multitasking lifestyles, where quick and easily digestible information is valued.
- Visual content is favored by Gen Z for learning about products and services.
 - Studies reveal that 57% of Gen Z prefer short videos for product research, highlighting a trend toward **visual and engaging content** over traditional text-based information.
 - Images and videos, wherever available, are the gateway to capturing Gen Z travelers' interest from the get-go.
- Travelers reported searching for recommendations they discovered on Reddit through Google to find related images and visualize the suggested experiences.
 - Gen Z uses **TikTok, YouTube and Instagram as search engines**, shifting from text-based searches to dynamic, visual discovery.
 - Travelers reported **cross-verifying visuals and reviews** for activities and itinerary items on social media like TikTok and YouTube.

“Visuals are a big part of both planning and shopping. When I'm looking at restaurants or places to visit, I like to see the vibe and atmosphere. I consider what a place looks like—it helps me know how good it might be. I look at a lot of photos when figuring out where to go. This applies to both destinations and lodging. For example, when we went to Louguello Beach in Puerto Rico, I compared different beaches and loved how that one looked. It was beautiful. photos are really important—just knowing what a place looks like matters. I search on Google for images, but I also use TikTok to see real people's trip experiences and what they share.”

For Gen Z travelers, visuals are the gateway, but user-generated content seals the decision [2/2]

- Gen Z travelers heavily depend on UGC as a primary source of information when making travel decisions.
 - They consider content created by peers to be authentic and trustworthy, influencing their choices regarding destinations, accommodations, and activities.
 - Outside of social media platforms, Tripadvisor is a trusted source of reviews for destination and itinerary related items.
- They value the authenticity, relatability and credibility found in UGC when making decisions.

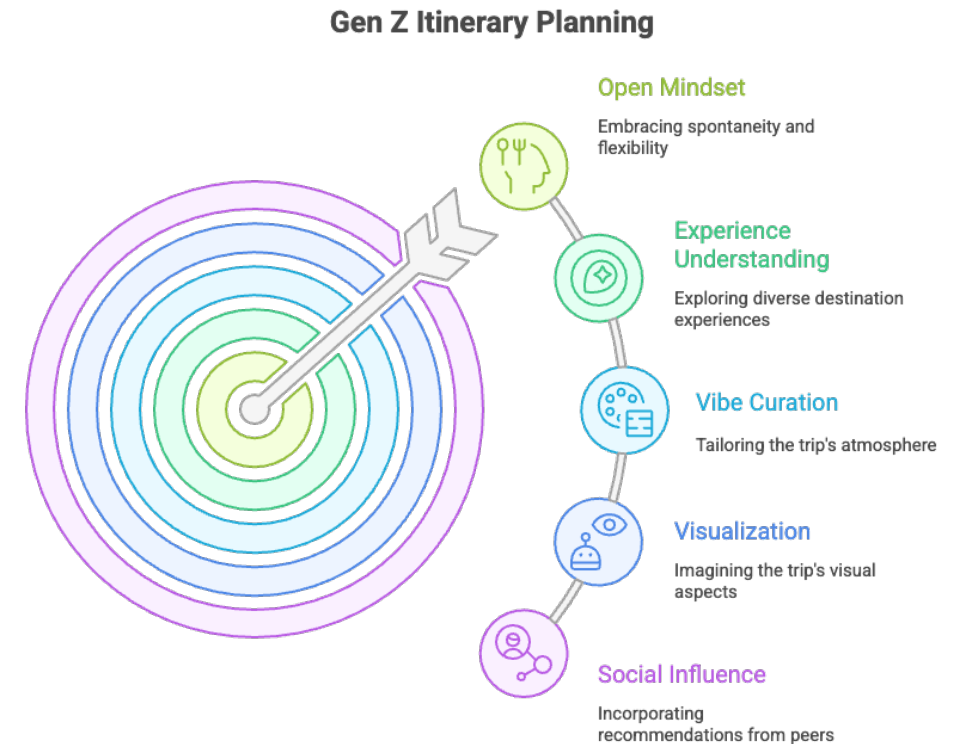
Top Influencers in Gen Z Travel Decisions



Gen Z Itinerary Planning Behavior

Gen Z itinerary planning behavior is categorized by:

- Going in with an open mindset and no boundaries of specific city names, dates etc.
- Not starting on a specific OTA website or app
- Understanding a variety of experiences available in the destination
- Curating a vibe for their trip
- Visualize what their trip will look like
- Bring in the recommendations and knowledge from social media and peer group



Trip Planning Observations compared by Generations

Millennials	Gen Z	Why it matters?
Destination is usually decided going into trip planning	Approximately 80% of Gen Z travelers either haven't decided on a destination or are considering multiple locations when they begin planning a trip	A first step for both is to check feasibility of the trip in terms of affordability. The goal is to make the trip happen – Gen Z may change destination while millennials may extend their budget or choose to go on a later date.
Content: Pictures	Content: Videos, Reels, Shorts	Visualization is important.
Organized Tracking (Notes app, spreadsheets)	Mental notes, saving reels on social media apps. Detail-oriented but unorganized tracking	Millennials: documenting and editing on the go is difficult Gen Z: the process is too distributed and decentralized
Decide how long based on itinerary and convenience.	Decide how long based on schedule, affordability and do-it-all-now. Typically prefer 5-7 nights (domestically)	Financial stability impacts decision making. Gen Z travelers prefer to do-it-all in one go with lesser probability of a return trip as compared to older generations
Itinerary Planning: Juggle multiple trip interests based on travel party	Itinerary Planning: Trip interests are generally aligned and shared – travel with <i>people like me</i>	Millennials: collaborative planning tools Gen Z: personalized content – dynamic and authentic
Itinerary Planning: Google search, Tripadvisor	Itinerary Planning: Social Media, Reddit, ChatGPT	Both value a one-stop-shop approach to itinerary planning

Gaps and opportunities in the current trip planning process

- **Unify the Journey**

- Bring Gen Z's non-linear, multi-platform planning into one seamless flow—from inspiration to booking.

- **Plan with Flexibility**

- Enable easy comparison across destinations, dates, and budgets to support open-ended decision-making.

- **Centralize the Itinerary**

- Transform scattered notes, maps, and saved spots into a customizable, all-in-one trip hub.

- **Curate the Vibe**

- Blend UGC, AI suggestions, and visual cues to anticipate gaps and bring the trip's tone and pace to life.

Booking Lodging/Stays

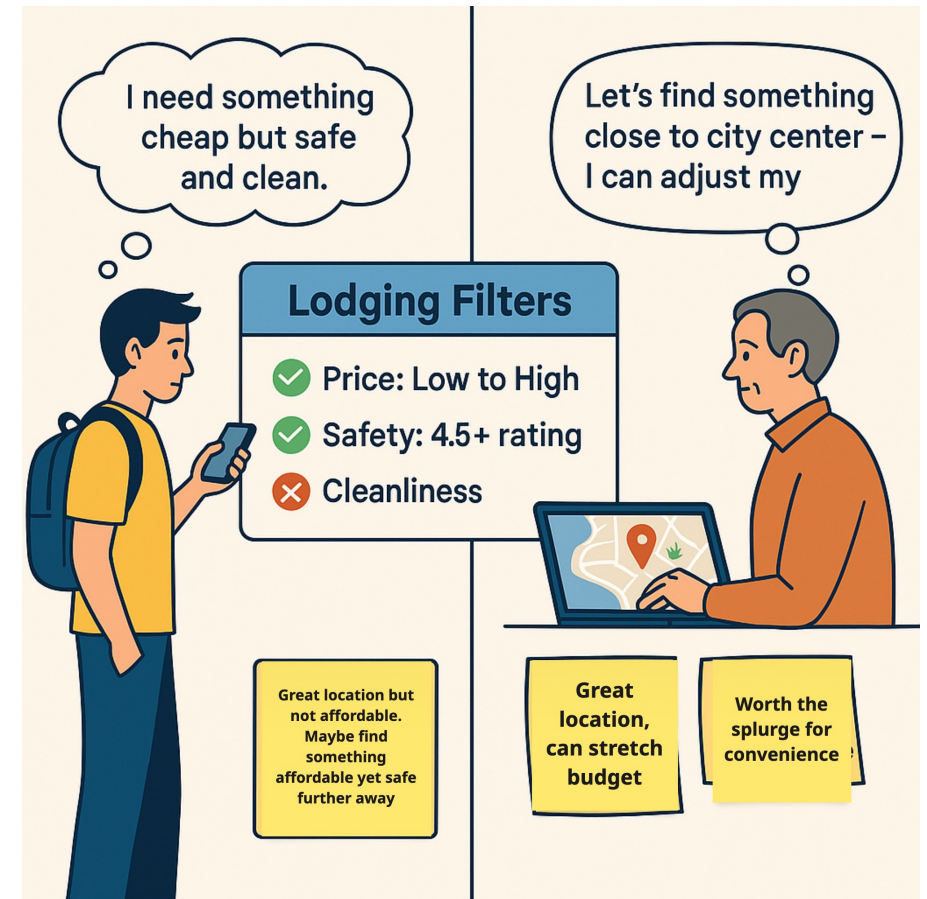
Price is the primary driver and decision maker

Payment Preferences Across Generations: Rise of Alternative Methods in Travel Booking

Generation	Key Trends	Why it matters
Gen Z (ages ~13–28)	<ul style="list-style-type: none">- 30% used alternative payments (Apple Pay, PayPal, BNPL) for travel booking (Hopper)- 44.1% used BNPL in 2022 (eMarketer)- 85% prefer digital payments over cash (PYMNTS)	<ul style="list-style-type: none">- Born into a digital-first world- Seek flexible, low-commitment options- Often lack credit history or savings
Millennials (ages ~29–44)	<ul style="list-style-type: none">- 37.2% used BNPL in 2022 (eMarketer)- 82% prefer digital payments over cash (PYMNTS)	<ul style="list-style-type: none">- Digitally savvy and value convenience- Slightly higher financial flexibility than Gen Z
Gen X (ages ~45–60)	<ul style="list-style-type: none">- 30% of PayPal's "Pay in 4" users are Gen X (PayPal)- Over 50% are repeat users- Higher annual spend (~\$2.4T/year) (PayPal)	<ul style="list-style-type: none">- Growing comfort with BNPL- Value convenience, though still tied to credit cards
Baby Boomers (ages ~61–79)	<ul style="list-style-type: none">- Low BNPL adoption (17.7%)- Strong preference for credit cards and cash (PayPal)	<ul style="list-style-type: none">- Tend to trust traditional methods- Less engaged with digital-first experiences

For Gen Z travelers, lodging price is the primary influencer in their decision making related to lodging as compared to location (1/3)

- More than older generations, the shopping process for Gen Z travelers is **dictated by price** and **strict budget** constraints from the get-go.
- Lack of affordability **limits flexibility** for Gen Z travelers as compared to the older generations.
 - **Tradeoffs help older travelers engineer an out-of-budget trip** into an affordable one. For Gen Z, rigidity in budget leaves no room for tradeoffs.
- Among older generations, lodging price tends to be a secondary consideration, typically evaluated only within the boundaries of their already preferred locations or neighborhoods.
 - Price considerations for planned leisure trips for **older generations** are more focused on **value than the nightly/total price**.
- For **Gen Zs**, finding a **trustworthy, safe and clean lodging that is cheap** for their duration of stay is the primary driver and motivator.
 - This is also a major struggle & deterrent for spontaneous trips.



For Gen Z travelers, lodging price is the primary influencer in their decision making related to lodging as compared to location (2/3)

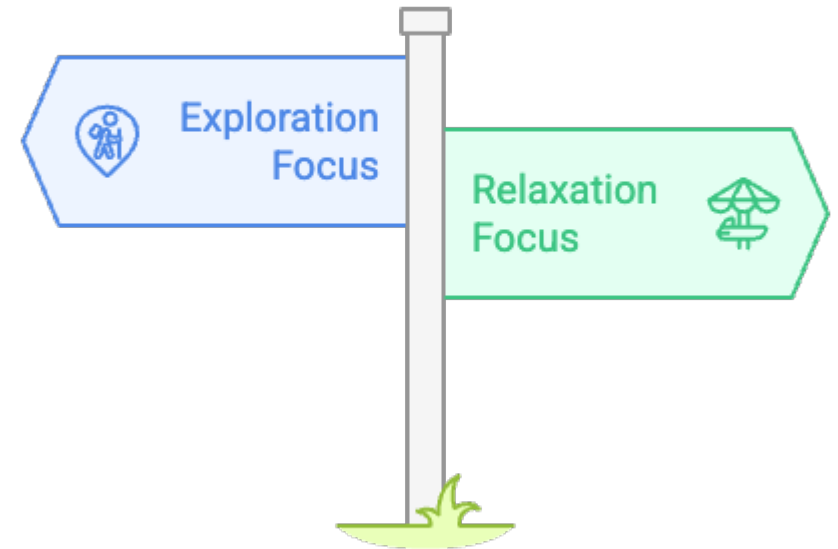
- **Price drives decision making** to an extent that when starting to shop, Gen Z travelers **embrace shopping for packages** with similar enthusiasm as shopping for trip items separately if packages make the trip more affordable.
 - Even at the cost of freedom in certain aspects of trip planning.
 - *This could be a hypothesis to be tested using analytics data on booking numbers for Gen Z travelers.*
- This was also evident in how these travelers approached lodging shopping and interacted with OTA SRP:
 - Cross-shopping between **CL and VR** is always a consideration for price-related reasons
 - [Often] Entry to OTA via a **meta search** based on lowest price offered
 - **Filtering first** approach to scrolling through SRP
 - Quickly parsing through **Price & Review Ratings** as they go down the SRP with little consideration for location and even pictures in the first pass.

"[New Orleans Trip] And for lodging [in New Orleans], we looked at, various options, hotels, Airbnb, Vrbo. And the two biggest factors for us was the price and also how many people you can accommodate. We were a total of six people. So hotel room, if you get it, it it has to be two rooms. So we've came down to an Airbnb or a Vrbo. And just based on the pricing, we stuck with Vrbo. It was, like, five miles away from the city center."

For Gen Z travelers, lodging price is the primary influencer in their decision making related to lodging as compared to location (3/3)

- Usually for exploration focused leisure trips, lodging is often viewed as a "place to crash" which in turn allows them to be relatively more financially free in their exploration and immersion in the destination.
- For leisure trips planned with the intent of relaxation and down time, e.g. beach towns, choice of lodging is typically an all-inclusive resort that is:
 - Not cost prohibitive
 - Access to the beach
 - Covers all or most of the necessary expenses in the lodging cost
 - Offers basic resort amenities (pool, spa, meals) or amenities the traveler is interested in within the lodging cost (not looking for everything)
 - Vibe at the property is adult-friendly and not family-friendly
 - Or, an affordable yet beautiful VR with beach access and other basic amenities

How to choose lodging for travel?



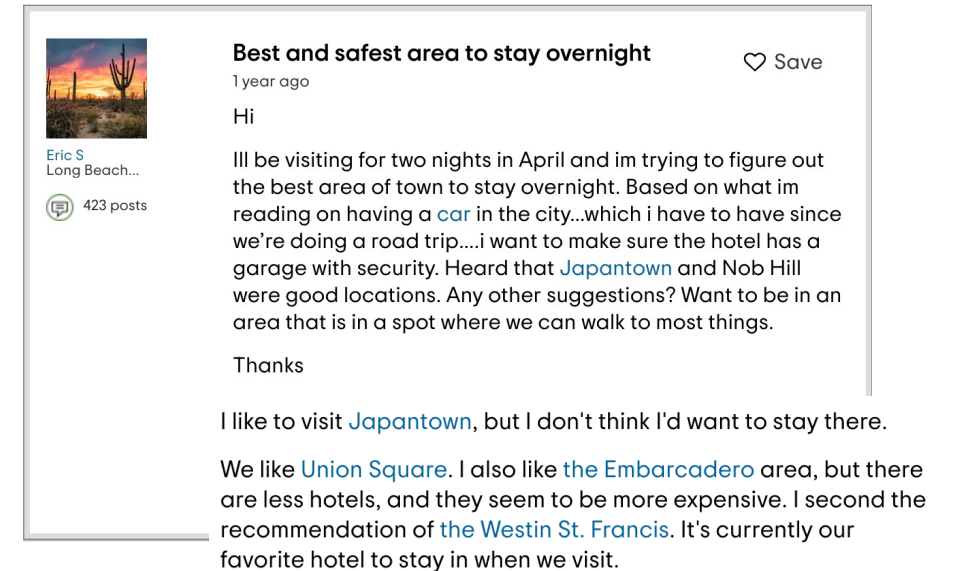
Gen Z travelers embrace both CL and VR as lodging options right from the start of their booking journey.

- Gen Zs will invariably **consider both CL and VR simultaneously** as soon as they start their lodging shopping journey.
 - However, in certain international destinations, higher safety and trust concerns make Gen Zs more cautious in their lodging choices, making them favor CL over VR.
- The primary reason driving the openness in exploration between lodging types is availability of options to choose from within the rigid budget constraints.
- Typically, the **choice between CL or VR is made early** in the lodging shopping process when cost and availability are being estimated, and the shopping journey then proceeds in a focused direction.
- For VRs, AirBnB is the primary platform for exploration and shopping although Gen Zs are more aware of the Vrbo brand than their *older cousins*.
- When shopping for VR:
 - There is a higher importance given to the number and quality of reviews to be sure of safety and quality at the property.
 - A "superhost" or similar tag on the property card drives confidence and trust.

[Brazil Trip] We for accommodation, it was a little more tough because it was something outside of United States. So we had to be a little more careful about the safety about the areas. But what we did, we used Google, we used Booking.com, KAYAK, Skyscanner, Airbnb, everything. And we wanted to make sure it was cheap, but at the same time, in a generally safe area. So to see if it was safe or not, we looked through different websites and, we went with hotel. But well, with hotel, half of the hotels and the other half was, like, Airbnb."

Gen Z travelers spend a lot of energy and time researching the safety of the lodging location and the cleanliness and overall quality of the lodging

- Given their search for low-cost lodging options in a destination, Gen Z travelers are vary of the overall quality (**cleanliness and safety**) at the property.
 - They spend time **sifting through OTA reviews** based on relevant keywords.
 - They often **cross-reference reviews** for the property on Google and Tripadvisor.
- Another time intensive task is **researching the safety of the location** the lodging is located in.
 - This is usually done by looking up **recent UGC** on the location or neighborhood name on **Reddit** and **Tripadvisor**.
- Advanced itinerary planning enables these travelers to go into lodging shopping armed with names of neighborhoods and locations of interest with respect to proximity to POI.
 - As opposed to the more traditional approach of prioritizing flights and lodging over itinerary by older generations.
- **Gen Z travelers** would rather **compromise on location than on price** when going into lodging shopping. They are not shy of commute time and do not mind driving or using public transport wherever available.

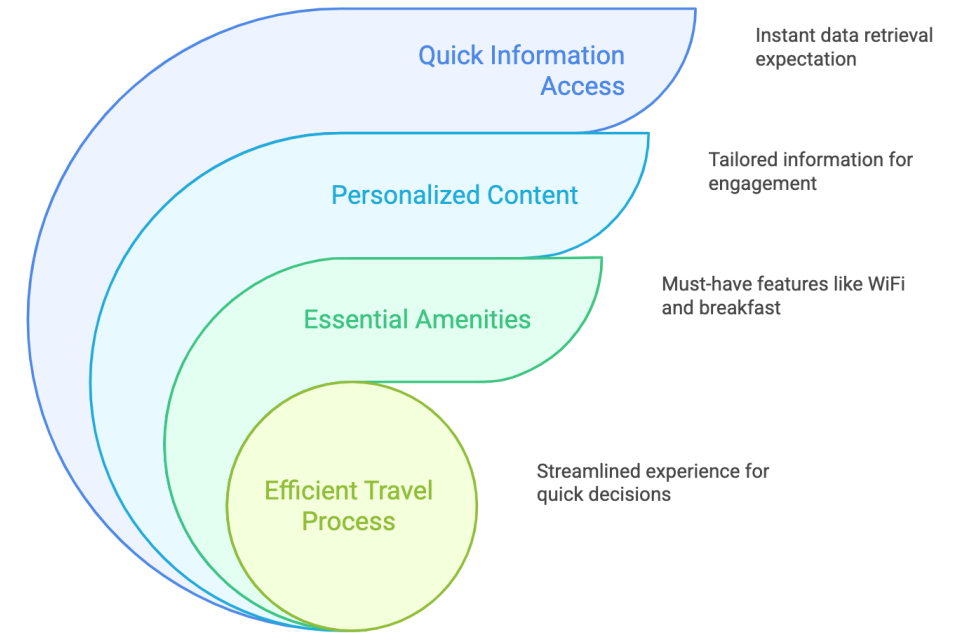


Nob Hill is a good location as is Union Square most hotels in that area have valet with secure parking.

I like Union Square. If you are a good walker it is within walking distance of most sights and has access to all of the kinds of public transportation. There are also several fairly reasonable parking garages in the area, less expensive than hotel parking, usually.

Gen Z travelers take a filtering-first approach to their exploration of properties on OTA Search Results Page (SRP)

- Gen Z has grown up with technology that offers instant access to information, leading to an **expectation for quick and easy retrieval of data**.
- Accustomed to highly personalized content on platforms like TikTok and Instagram, Gen Z favor and seeks **personalized content in readily digestible formats** aligning with their multitasking habits and shorter time spans.
- Landing on an **OTA SRP**, the first order of business for the Gen Z travelers is to **customize the page** to their needs and preferences by using filters, primarily *price*.
 - This helps them **save time and makes the process more efficient** by presenting them with properties that align with their trip intent and context.
- Having free and fast WiFi and free or low-cost Parking (wherever applicable) are important (must-have) amenities in addition to a strong preference towards Free Breakfast.
- Gen Z's filter-first approach to navigate SRP is different from a more exploration focused browsing observed by millennials and older generations.



Price and reviews drive Gen Z lodging choices, but a striking hero image can be the visual hook that captures their attention (1/2)

- Scrolling down a **filtered SRP**, attention is directed at **price and review ratings** as the travelers swiftly and quickly moved down the page, without dwelling on a property card longer than a couple of seconds.
 - Direct comparison is immediately in effect between rating and price.
 - If interested, the card was clicked to open PDP for further exploration.
- A **compelling hero image** within the filtered results grabs attention and intrigued travelers to look through photos on the SRP.
 - Some travelers reported that the pictures carousel on BEX and other popular OTAs felt bigger and had more to offer than the ones on Google travel.
- Compared to the older generations especially millennials, Gen Zs' reliance on map view on SRP was considerably less although analytics data is needed to confidently confirm or deny this observation.
 - Possible reasons: price & reviews takes precedence over location
 - When important, some travelers opted for location specific filtering.

"But Expedia is usually a lot more expensive than I expect. I think I've booked through them before, so it feels pretty similar. I click into it, and it gives me other options to explore. I can look at other listings and see which ones could be good—sometimes breakfast is included, which is nice.

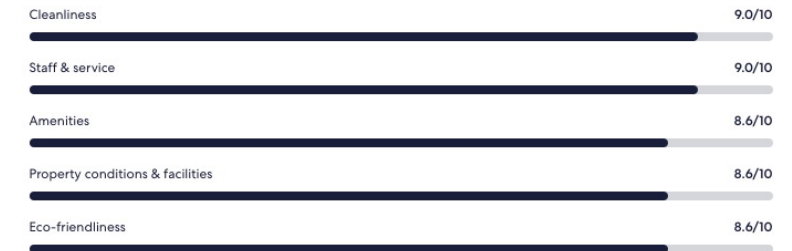
It's a similar process for me: I look at the images and the reviews. I focus on brands I know and the price. I've heard of all of these. Maybe it's because the pictures are bigger on here (BEX compared to Google Hotels), but I was looking at them a bit more.

I think the filtering is really good. I don't want to pay more than I'm comfortable with—I'm never going to spend a thousand dollars. I just filter to match my price range. The filtering helps a lot. It also tells you what neighborhoods the listings are in, so I can explore those areas.

The only issue I notice is that sometimes when you try to book, a listing is suddenly unavailable. Then you have to book another one that's maybe \$130 instead of \$118."

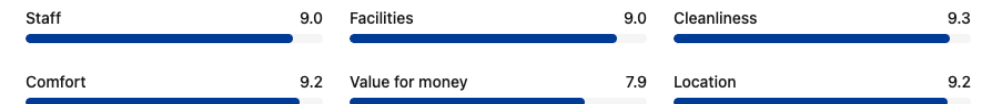
Price and reviews drive Gen Z lodging choices, but a striking hero image can be the visual hook that captures their attention (2/2)

- Reviews, Location (map and commute times), Room rates (total price), and Photos were key factors considered on PDP.
- Majority of the exploration on **PDP** was centered on **sifting through reviews** where travelers looked for relevant **keywords** and related phrases to get a general sense of the quality of the hotel.
 - They did not dive deep into reading every recent review.
 - Number of reviews were as important as the review rating. A higher number of reviews were sought out for VRs as compared to CL.
 - Many travelers reported favoring **attributes scores**, and **traveler submitted pictures**.
 - For VRs, a superhost tag on the property on SRP drove confidence and trust.



[See all photos](#)

Categories:



Filters

Reviewers	Review scores	Languages	Time of year
All (402) ▼	All (402) ▼	All (402) ▼	All (402) ▼

Select topics to read reviews:

[+ Location](#) [+ Room](#) [+ Clean](#) [+ Parking](#) [+ Bar](#) [Q](#) [Show more](#)

A Perfect Lodging for Gen Z travelers

For exploration driven leisure trips

- A place to crash
- Safe location
- *Affordable* (typically cheaper than average)
- Clean
- Amenities: High speed WiFi, Free parking, Free breakfast
- Primary Metrics:
 - o Price
 - o Lodging specific Reviews & ratings (on OTA)
 - o UGC (on platforms like Redditt, Tripadvisor)
 - o Superhost (in case of VR)

For relaxation focused leisure trips

- A part of the experience
- Location is viewed in terms of proximity to POI, e.g. beach access, great views
- *Affordable* – all-inclusive resorts or VRs on the beach
- Clean
- Amenities: High speed WiFi
- Primary Metrics:
 - o Price
 - o Lodging specific Reviews & ratings (on OTA)
 - o Pictures
 - o Location
 - o In case of VR: UGC for safety of location, Superhost

Gen Z Lodging Shopping Behavior

What Gen Z wants:

- Affordable, cost prohibitive options – agnostic to lodging type
- Safety (location and property)
- Cleanliness (property)
- Basic amenities (WiFi, Parking, Breakfast) for free
- Visual thinking and fast decision making
- Quick and easy customization (ideally, personalization)

The screenshot displays a travel booking app interface. At the top, search filters are set: 'Where to?' is 'San Juan (and vicinity), Puerto Rico', 'Dates' are 'May 1 - May 5', and 'Travelers' are '2 travelers, 1 room'. A map on the left shows the location. Below the map, there are options to 'View in a map', 'Compare properties', and a search bar with 'e.g. Marriott'. The main section shows a list of hotel results, each with a thumbnail image, name, location, amenities, and pricing. The results are sorted by 'Recommended'.

Search filters:

- Where to? San Juan (and vicinity), Puerto Rico
- Dates May 1 - May 5
- Travelers 2 travelers, 1 room

Search results:

- Wyndham Palmas Beach and Golf Boutique Resort**
San Juan
Amenities: Pool, Hot tub
Description: Discover a renovated boutique experience where lush gardens and elegant bohemian vibes create a serene haven for the soul.
Fully refundable. Reserve now, pay later. Earn \$16.26 in OneKeyCash.
Gold Price \$203 off
\$254 \$197
\$1,058 total includes taxes & fees
0.2 Very Good 502 reviews
- El Colonial - Adults Only**
San Juan
Fully refundable. Reserve now, pay later. Earn \$19.08 \$38.16 in OneKeyCash.
Gold Price \$846 off
\$450 \$233
\$1,222 total includes taxes & fees
9.4 Exceptional 1,133 reviews
- Armas Hotel**
San Juan
Fully refundable. Reserve now, pay later. Earn \$14.33 in OneKeyCash.
\$239 off
\$239 \$173
\$858 total includes taxes & fees
8.8 Excellent 141 reviews
- The Condado Plaza Hotel**
Condado
Amenities: Pool
Earn \$20.74 in OneKeyCash.
We have 2 left at
\$250 \$253
\$1,260 total includes taxes & fees
7.6 Good 1,043 reviews
- Hampton Inn & Suites San Juan**
Isla Verde
Amenities: Breakfast included, Pool, Hot tub

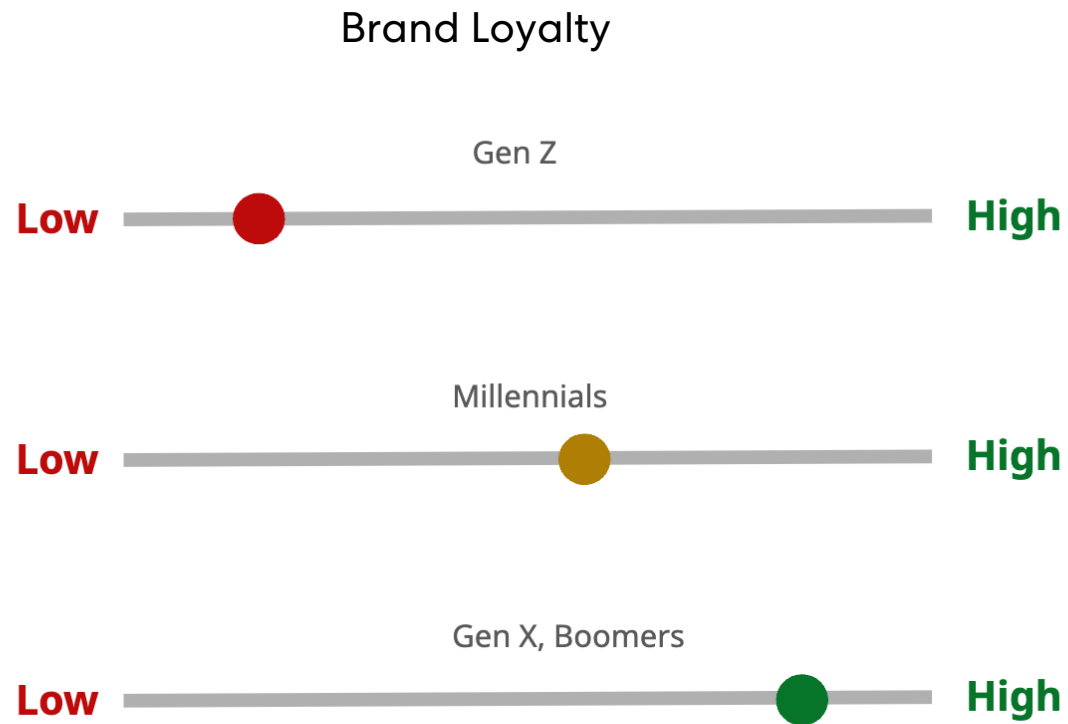
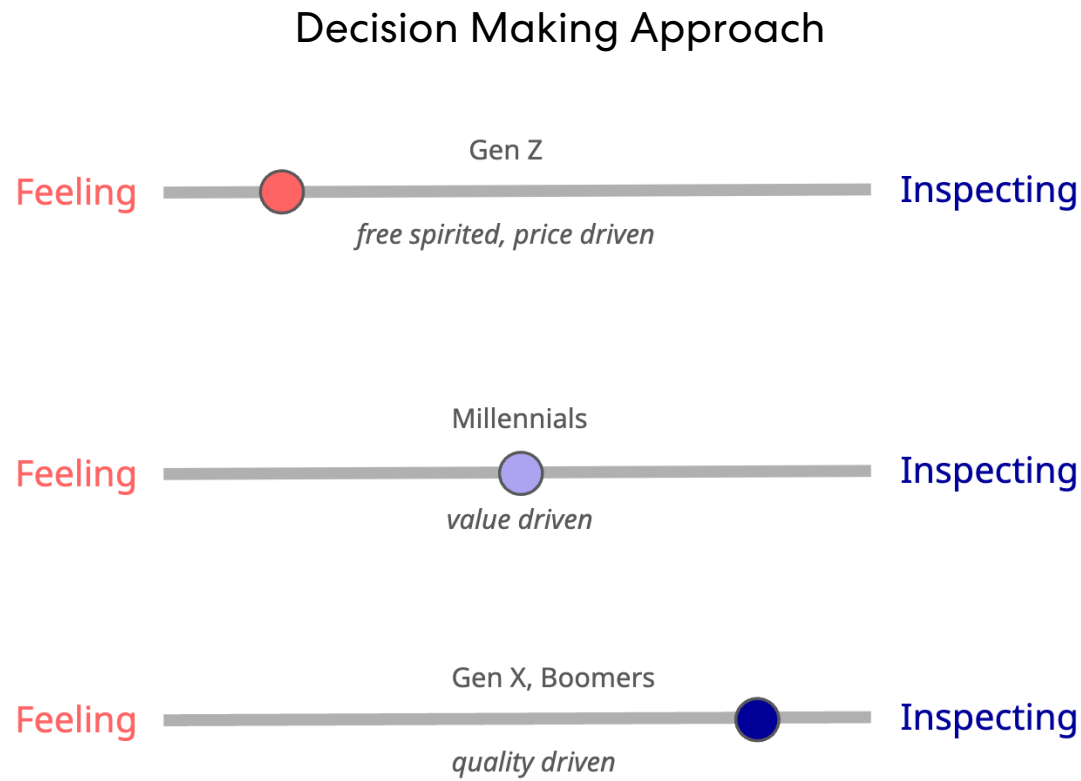
Filter by:

- Popular filters: Old San Juan, Ocean view, Hotel, Breakfast included, Reserve now, pay later
- Price: Min \$0, Max \$1,000+
- Stay options: Any (selected), Hotels, Homes
- Neighborhood: San Juan (and vicinity) (selected)

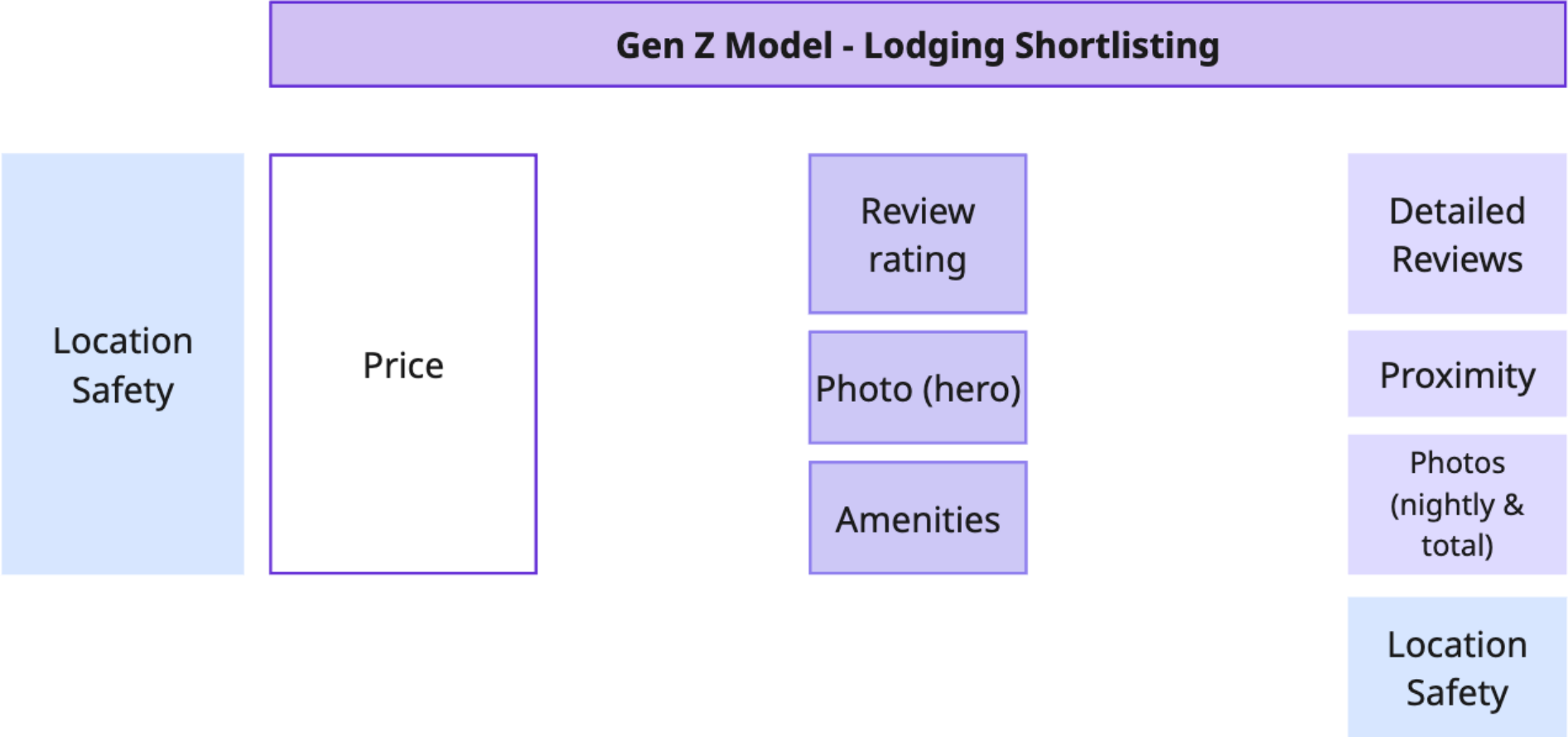
Sidebars:

- Top right: Book a package and save a bundle
- Bottom right: metro by Mobile, \$25/mo. for 4 lines + 4 FREE 5G phones. CHECK IT OUT

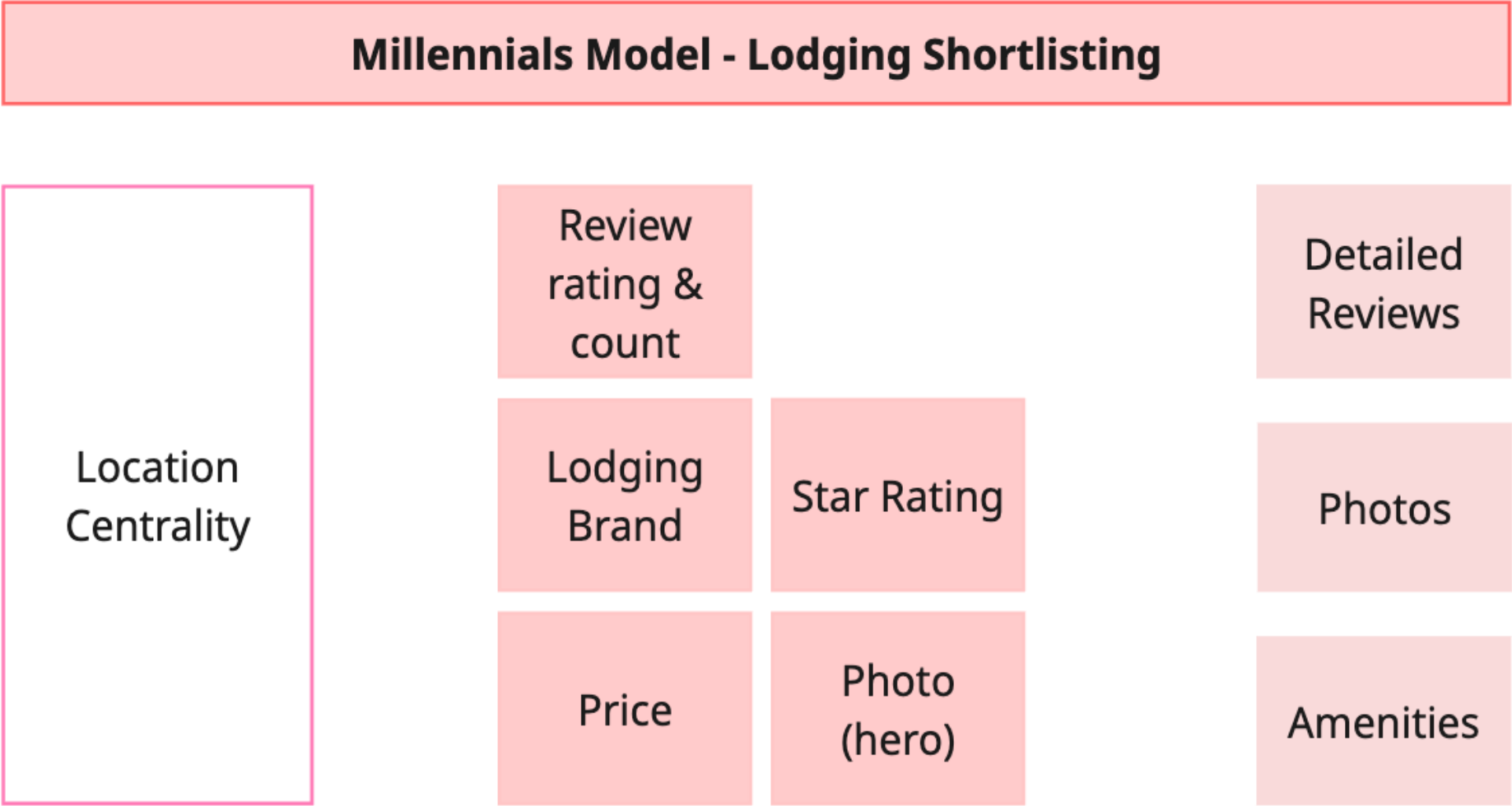
Lodging shopping behaviors by generations



Lodging Shopping at a glance



Lodging Shopping at a glance



Lodging Shopping Behavior by Generations

Gen Z	Older Generations
<p>Price sensitive</p> <p>Compromise on location centrality for price</p> <p>Brand Name: safety, trust</p> <p>VR or CL: cheaper option</p> <p>Lead by refinement on SRP – filters</p> <p>Filters: price, free & fast wifi, free breakfast, free parking</p> <p>Compelling hero image is enticing if affordable. Bigger image on card are preferred and draw attention.</p> <p>Low to no brand loyalty. Cheapest option booked. Entry to OTA – meta search</p> <p>Reserve now, pay later is enticing</p> <p>Decision style: Quick filters, vibes, peer trust</p> <p>Review rating is crucial</p> <p>Free cancellation is great</p> <p>Bigger screen for shopping & booking</p>	<p>Millenials: Value sensitive Older: Quality sensitive</p> <p>Flex the price to get a better location or quality</p> <p>Brand Name: quality, trust, loyalty points</p> <p>VR or CL: more convenient option</p> <p>Lead by exploration on SRP</p> <p>Filters: breakfast, parking pool</p> <p>Compelling hero image is important. Scroll through image carousel.</p> <p>Mid to high brand loyalty. Rewards membership with brands.</p> <p>Not so much</p> <p>Decision Style Millenials: side by side comparison Decision Style Older: Risk averse, trust reputation</p> <p>Review rating is crucial</p> <p>Free cancellation is sought</p> <p>Bigger screen for shopping & booking</p>

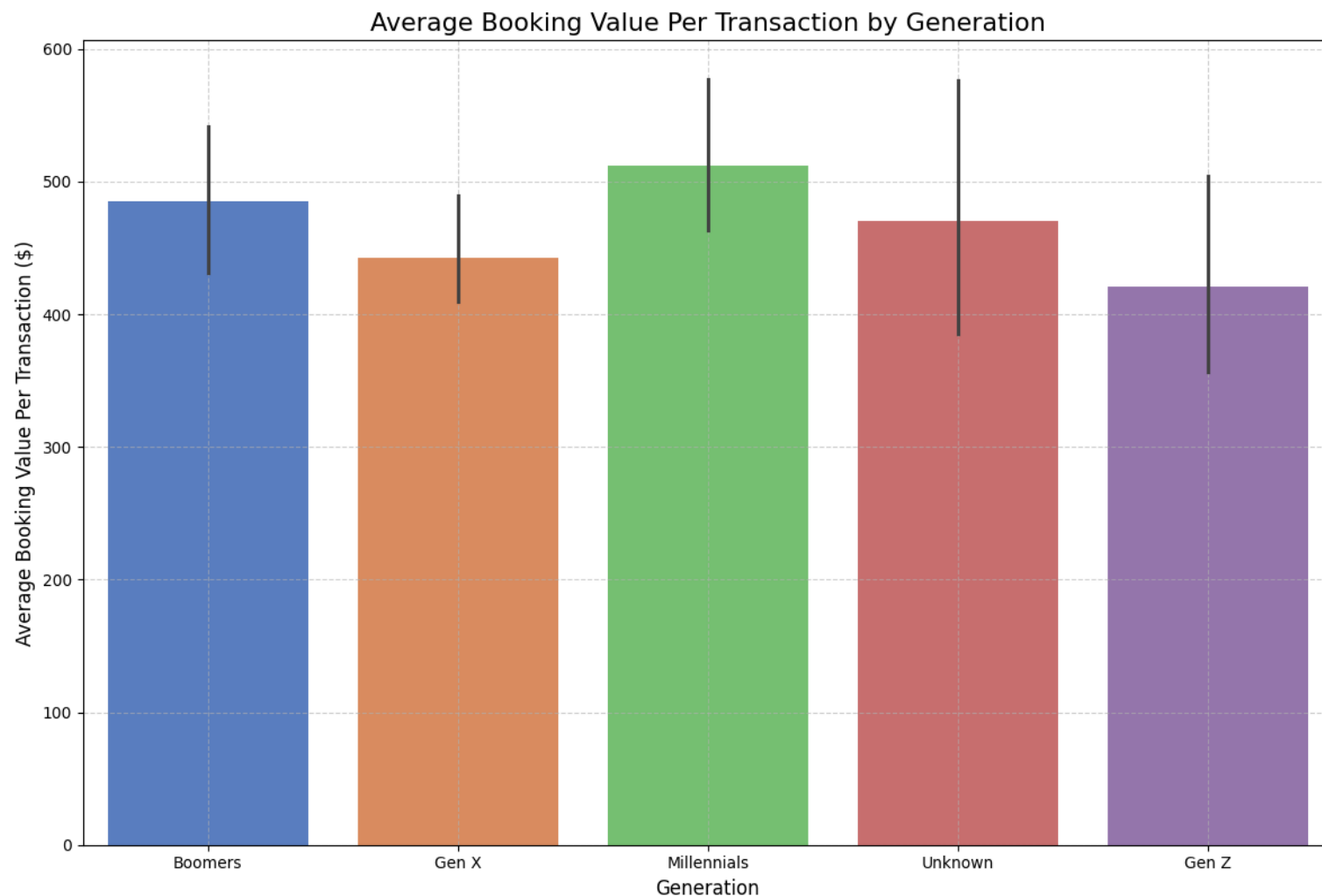
Gaps and opportunities – lodging shopping

- Safety-savvy travelers want trusted local insight
 - Gen Z already hunts for unsponsored reviews and AI tools to gauge safety and vibe—prime space for us to be the go-to source for neighborhood intelligence and trip planning.
- Price trade-offs spark new travel needs
 - When Gen Z trades location convenience for cost, they're open to making “getting around” part of the adventure—bundling transport, interactive maps, and local experiences right into booking.
- Personalization starts at the first scroll
 - Gen Z customizes SRP from the moment they land—opening the door for smarter, faster filtering that feels built just for them.
- Decisions made at speed need designs that keep up
 - Rapid tab-hopping and laser-focused scanning call for skimmable, signal-first layouts that make “yes” or “no” decisions instant.



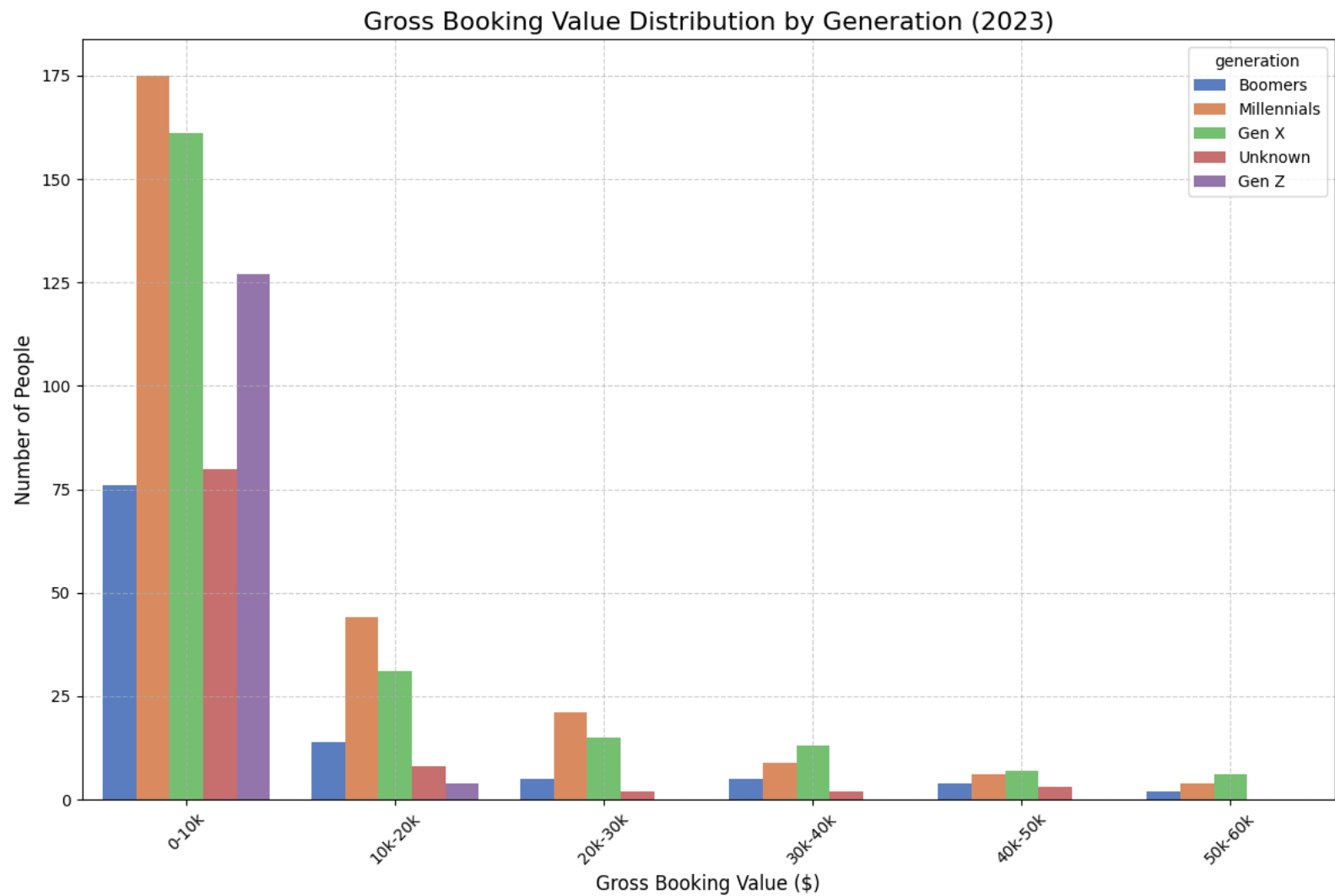
Appendix

Average Lodging Booking Value per Transaction distributed by Generation



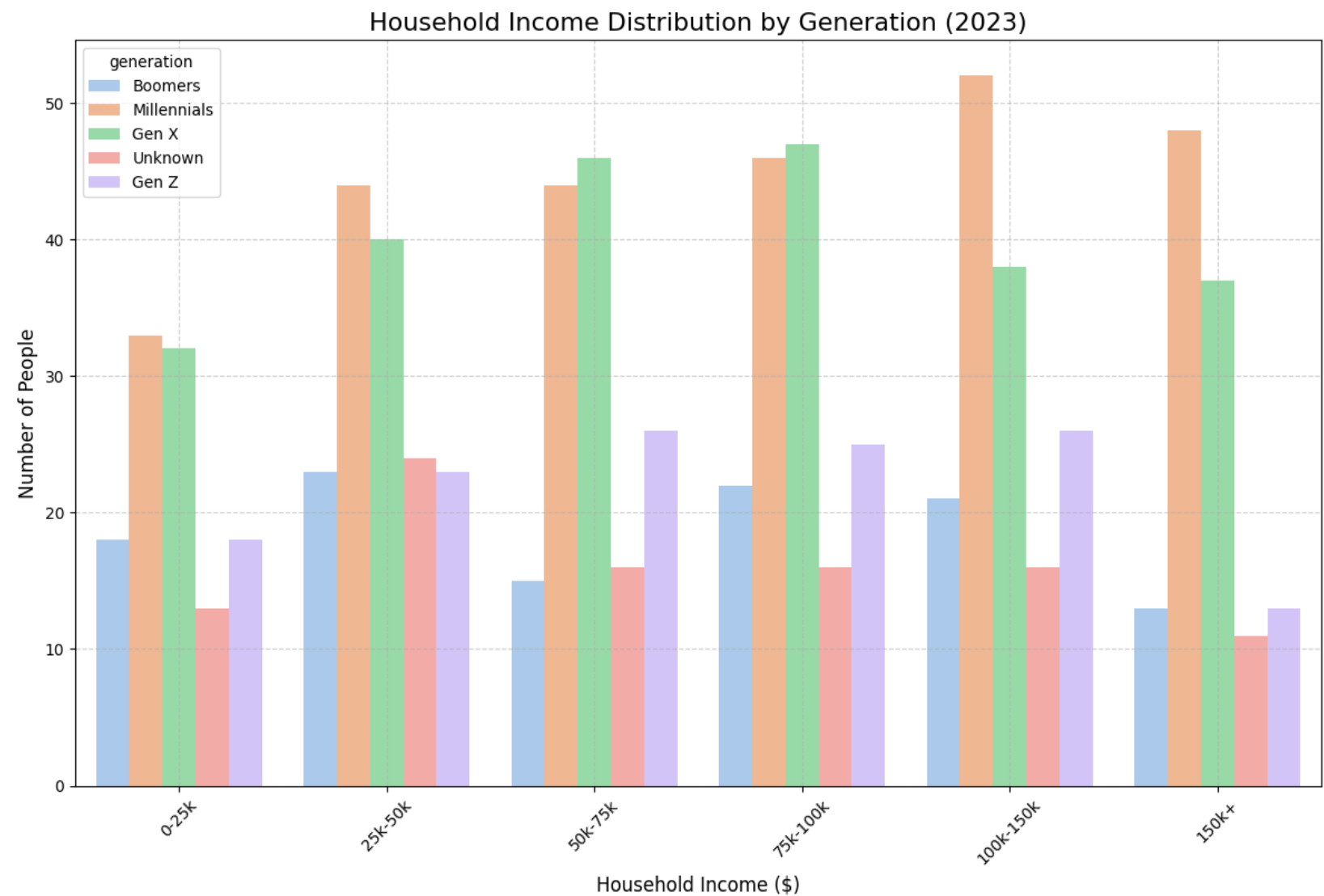
Source: [HiFi Dataset](#) - it is derived from an email aggregator app with **more than 500K anonymised users in the US** who have opted into a research feature.

Gross Lodging Booking Value distributed by Generation



Source: [HiFi Dataset](#) - it is derived from an email aggregator app with **more than 500K anonymised users in the US** who have opted into a research feature.

Household Income Distribution by Generation



Source: [HiFi Dataset](#) - it is derived from an email aggregator app with **more than 500K anonymised users in the US** who have opted into a research feature.

Links

Desk Research

<https://www.phocuswire.com/perplexity-selfbook-agentic-ai-travel-booking-tripadvisor>

https://www.marketingdive.com/news/84-of-gen-z-travelers-are-influenced-by-social-media-expedia-study-finds/542551/?utm_source=chatgpt.com

https://www.lifewire.com/short-video-marketing-8724125?utm_source=chatgpt.com

https://firework.com/blog/short-form-video-statistics?utm_source=chatgpt.com

Links

- **Hopper x Morning Consult: Gen Z Travel Trends**
<https://media.hopper.com/research/activating-gen-z-and-the-future-of-travel>
→ Research on Gen Z booking behavior, payment preferences, and travel motivations
- **Skift Research: Exploring Gen Z and Millennial Travel Habits**
<https://skift.com> (Search for Gen Z travel research reports)
→ Behavioral contrasts in planning, spontaneity, and digital decision-making
- **Expedia Group: Travel Trends Report**
<https://www.expediagroup.com> (Search: "Generational travel insights")
→ Data on how Gen Z uses OTAs, UGC, and visual content in travel planning
- **Think With Google x Ipsos: Gen Z Travel & Search Behavior**
<https://www.thinkwithgoogle.com>
→ Trends in mobile-first, visual-first search among Gen Z
- **McKinsey & Company: The State of Gen Z**
<https://www.mckinsey.com>
→ Gen Z's values, trust preferences, and digital behavior across verticals
- **eMarketer: BNPL Usage Across Generations**
<https://www.emarketer.com> (Search: "BNPL Gen Z Millennials")
→ Comparative data on usage of alternative payments across age groups
- **PayPal: Buy Now, Pay Later Generational Usage**
<https://www.paypal.com/us/brc/article/pay-later-usage-across-generations>
→ Data on how Gen Z, Gen X, and Boomers differ in using PayPal Pay Later
- **PR Newswire: Fliggy BNPL Travel Report 2024**
<https://www.prnewswire.com> (Search: "Fliggy BNPL Gen Z 2024")
→ 20% YoY growth in BNPL travel bookings, driven by Gen Z users
- **GlobalWebIndex (GWI): Generational Marketing Personas**
<https://www.gwi.com>
→ Data-backed insights on Gen Z's media preferences and peer influence
- **Edelman Trust Barometer**
<https://www.edelman.com/trust>
→ Research showing Gen Z's trust in people "like them" over institutions

Links

- [Hopper Research: Activating Gen Z and the Future of Travel](#)
- [eMarketer: 75% of BNPL Users Are Gen Z or Millennials](#)
- [PYMNTS.com: 85% of Gen Z Prefer Digital Payments](#)
- PayPal Business Resource Center: BNPL Usage Across Generations
 - [BNPL Use Across Generations](#)
 - [BNPL Demographics Among Gen X and Boomers](#)