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Intercultural Development

of Tourism Systems

Final Thesis

Understanding Generation Z Travellers

An Australian Perspective

and a Worldwide Tool

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ABSTRACT

Generation Z members represent an important portion of the global population. Their influence on the market and the ability to reshape the offer are rapidly increasing over time as buying power and presence on the market keep rising. The provision of services and experiences tailored ad hoc for young travellers is a necessity for the tourism sector in order to be able to remain competitive and relevant in its offer.

The purpose of the thesis is to provide a comprehensive understanding of Generation Z travellers in order to suggest a tool that will help ensure the development of the travel industry in meeting the demands of this new demographic group. An analysis of the characteristics of the generation will be conducted by exploring existing research and quantitative data on behaviours, motivations, values and attitudes to better understand the group at its core and in relation to previous generations. After defining the cohort subject of this study, an overview of the current state of the travel industry will be presented in order to consider the background of action. It will follow a zoom on the Australian market, focus of data collection. Adopting the approach and methodology of UX Research, a collection of qualitative data from user interviews will be used as complementary to the literature review to dive deeper into travellers' real expectations and needs and highlight similarities and disparities in the current knowledge on the topic. To conclude, a presentation and discussion of the findings are aimed at outlining possible and innovative solutions that will consider a holistic approach, hypothesising an achievement in trying to satisfy Generation Z travellers' real needs and expectations in a continuously changing environment.

Keywords: *Generation Z, behaviour, values, experience, travel, Australia, technology, young travellers, qualitative research, UX Research, understanding.*

ABSTRACT IN ITALIANO

La Generazione Z rappresenta una parte importante della popolazione globale. L'influenza esercitata sul mercato e la capacità di rimodellare l'offerta stanno rapidamente crescendo, come il potere d'acquisto e la presenza sul mercato diventano più solidi. È evidente dunque che la fornitura di servizi ed esperienze su misura per nuove generazioni di viaggiatori è una necessità che il settore turistico deve considerare ed implementare per poter rimanere competitivo e rilevante nella sua offerta.

Lo scopo della presente tesi è fornire una comprensione esaustiva di questa generazione, al fine di suggerire uno strumento che contribuirà a garantire lo sviluppo dell'industria nel soddisfare le esigenze di questo nuovo gruppo demografico. Verrà condotta un'analisi sulle caratteristiche della generazione esplorando le ricerche esistenti e i dati quantitativi su comportamenti, motivazioni, valori e atteggiamenti, per comprendere meglio il gruppo al suo interno e in relazione alle generazioni precedenti. Dopo aver definito la coorte oggetto di questo studio, verrà presentata una panoramica dello stato attuale dell'industria turistica al fine di considerare l'attuale contesto d'azione. Seguirà uno zoom sul mercato australiano, focus della raccolta dati. Adottando l'approccio e la metodologia della UX Reseach, una raccolta di dati qualitativi tramite interviste sarà utilizzata come complemento alla revisione della letteratura, per approfondire le aspettative e le esigenze reali dei viaggiatori ed evidenziare somiglianze e disparità nelle attuali conoscenze sull'argomento. Per concludere, la presentazione e discussione dei risultati è finalizzata a delineare possibili e innovative soluzioni che prenderanno in considerazione un approccio olistico, ipotizzando un risultato positivo nel tentativo di soddisfare le reali esigenze e aspettative dei viaggiatori della Generazione Z.

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Chapter I

PRESENTATION OF THE THESIS

1.1 Introduction

The present thesis inserts into the realm of studies on the travel industry. It seeks to contribute to the field of academic research by exploring the user experience of Generation Z travellers, with a focus on the destination Australia. In particular, the study explores and understands Generation Z’s behaviours and preferences applied to travel, in order to provide a tool able to identify and anticipate new trends and changes that are emerging in youth tourism.

Generation Z makes up a significant constituent of the worldwide population. Their power to shape market demand and redefine products is increasing rapidly as their presence gains force along with that of purchasing power. In order for the tourism sector to stay effective and be able to craft tailor-made services and experiences specifically designed for young travellers, there is a need for a deep understanding of this demographic cohort.

The objective of this thesis is to gain an in-depth comprehension of Generation Z travellers, so as to propose a tool capable of assisting the travel industry's growth and adaptation towards fulfilling the requirements of this new generation. The exploration aims at presenting various aspects of this demographic's travel behaviour in order to address how customer satisfaction may be improved by taking into account the particularity of young travellers' wants and needs, while developing solutions tailored toward them to better serve their growing presence as consumers within the industry.

A comprehensive analysis of the traits shared by this generation will be conducted through the examination of existing research material, as well as quantitative data relating to their behavioural patterns, motivations, values and attitudes. This is done in order to gain a deeper understanding of the intrinsic characteristics of this generation and how they contrast against previous generations. By delving into what marks the group out uniquely, organisations or individuals can better reach the cohort on any level, communicating and connecting more effectively with them for present and future perspectives.

Once the group has been identified, a summary of the current state of the travel industry will be presented in order to acknowledge any existing conditions. Following the focus of this paper, an overview of the Australian travel industry will also be outlined, discussing, in particular, the youth travel sector in the country and its controversies.

Using a zoom-in approach, the collection of user data based on UX Research methodology will be conducted in order to gain insight into travellers' experiences concerning the Australian destination. This qualitative information will supplement the literature review.
Ultimately, through evaluating both sets of records, the paper aims to generate a list of comprehensive findings that seek the ultimate truth behind expectations and preferences among Gen Z travellers, ultimately helping us acquire a more accurate understanding than either source could provide isolatedly. In conclusion, solutions are proposed that consider the synthesis between the literature reviewed and the interpretation of the explorative research conducted. Taking into account the rapid changing technology landscape, innovative ideas are expected based on these observations with an eye towards creating successful long-term results tailored specifically for this demographic group.

To help the reading, this chapter provides a thorough overview of the significance of youth tourism, an introductory discourse of the theoretical basis of how generational cohorts manifest in sociology, as well as an insightful premise on the methodology used for the research. This serves as the foundation for the rest of the paper and the theories which will be explored in order to further elucidate the role of Generation Z in the contemporary travel industry.

To create a roadmap for the entire paper, an outline of the thesis's organisation is ultimately devised.

1.2 Youth tourism

"*Right now, the planet is home to around 1.8 billion people between the ages of 10-24, the largest generation of youth in human history.*" (UNWTO, 2022)

The significance of youth tourism is expanding globally. As the number of young people travelling internationally increases, youth tourism has become one of the most rapidly expanding parts of international travel, accounting for more than 23% of the one billion international tourists every year. This increase brings opportunities for economic benefit to local areas as young tourists support native tourism companies, create stronger links between the visiting population and local people, and promote the safeguarding of the environment. (UNWTO, 2016)

The tourism industry has already begun to be reshaped by Millennials and this process is expected to come full circle with Generation Z. Gen Zers, who are currently entering adulthood, have already been significantly impacted by the waves of disruptive technology, political turbulence and conflicts, as well as the effects of the COVID-19 pandemic, which are predicted to have long-lasting repercussions on the global economy and society. However, in the coming years, Gen Zers will become the most influential generation and, upon becoming fully economically active, will be the primary decision-makers in economic sectors. Young generations also demonstrated more resilience towards challenges such as the pandemic and are eager to restart travelling as soon as possible. The UNWTO recognises the importance of empowering young people and give them the opportunity to actively participate in decision-making processes regarding the travel industry.

1.3 Generational cohorts and Generation Z

It has been observed in the literature that the sociological distinction among generational cohorts, although not precisely descriptive of individual behaviours and preferences, is useful when analysing general attitudes towards a broad range of interests. For this reason, studies on trends and consumer behaviour make use of Generational Theory[1], which describes different generations based on a set of specific characteristics. The traits of each generation are generally associated with main historical events, and as a consequence, the point of distinction among generations is age. By looking at different generations and thus following a division by generational cohorts according to age, researchers are able to observe how behaviours evolve over time. This data is extremely useful for businesses of all kinds, as it allows to gain insight into the preferences and habits of their newest customers.

Referring to the new generation, Haddouche and Salomone (2018), argue that the present 'digital age' has led to a new demographic of people whose lives and behaviours have been shaped by technology, internet access and social media platforms, enough to be identified as its own group.

1.3.1 The Z Generation

Members of Generation Z, often described as highly adaptable, clever, and tolerant, partook in growing up surrounded by a range of environmental, terrorist, geopolitical and economic tensions. With a variety of diverse lifestyles, motivations and behaviour,

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[1] The Generational Theory of Howe and Strauss is a school of thought that attempts to explain the behaviour of generations by examining their experiences and life events, particularly referring to their formative years. The theory distinguishes specific generations into distinct birth cohorts, lasting around 20-25 years each. The theory was developed by William Strauss and Neil Howe in their 1991 book Generations and was later expanded upon in subsequent books. The theory represents a framework for understanding and forecasting the characteristics, values, and experiences of a given generation and how they impact the political, economic, and social climates of their respective societies. It seeks to explain why certain generations are more prone to certain beliefs and behaviours. It also provides a basis for examining the underlying dynamics behind the passing of cultural norms and values from one generation to the next.

it is challenging to form a generalisation of this specific demographic, though it is possible to identify common characteristics.

Generation Z has already demonstrated a tendency to have higher expectations on travel experiences than simply capturing pictures of monuments and museums. Being surrounded by the omnipresence of technology, Gen Zers will desire engaging and immersive experiences, able to deliver a lifetime value. Travel can also provide them with countless chances to counteract loneliness, develop social skills and bolster self-confidence. Generation Z is defined as the most diverse, globally conscious and connected generation yet. Their attitude towards travelling is shaped by their unique lifestyles and attitude towards the world around them. They are likely to seek out experiences that provide a sense of authenticity, adventure and cultural immersion. They want to engage with brands that are able to 'take a stand' on issues and ideals they believe in and recognise themselves, as an affirmation of identity. Destinations and service providers that comprehend travel's role as an integral part of young travellers' lives and an emotional release will be swiftly embraced by Generation Z.

Understanding Generation Z's attitude towards travelling is important for many reasons, including the ability to gain insight into the values that guide their decision-making and how they influence the changing dynamics of the travel industry. It is also important for businesses to understand the needs and motivations of Generation Z travellers in order to create new tailored experiences. With this knowledge, businesses can create products and services that appeal to the values of this new cohort and ultimately create a more positive travel experience for this crucial demographic.

1.4 Premises

A scarcity in contemporary academic papers has been identified regarding the study of Gen Zers in their travelling behaviours. The studies explored mostly rely on sources from more than two years ago and focus on East Asian realities. On the other hand, the most recent sources were found among non-academic materials available on the web, often referring to the American perspective. Those are publications by different media that produce business-related news, analysis and opinion pieces, sometimes pursuing native advertising. Additionally, recent studies on inbound Gen Z travellers to Australia are also absent.

The issue of collecting updated information is increasingly becoming of interest as the pace of innovation in technology and ICT become faster. Data is fastly becoming obsolete and the speed of data degradation necessitates the need for faster collection and analysis. This poses a question in academic research, where scientific and rigorous procedures often result in lengthy approval and publication processes.

The exploration of alternative methods to generate and analyse data quickly, in order to keep up with the rapidly changing environment is thus a necessity. To this end, the tech world's tools and procedures, such as agile methodology and UX research, offer inspiration to innovate and practically employ research. Agile methodology is an iterative, incremental management process that focuses on delivering value and gathering feedback quickly. This is achieved by frequent data collection and immediate implementation, allowing keep up with changing trends. UX research, on the other hand, addresses understanding users' needs and behaviours through a direct and continuous collection of qualitative information focused on the user's experiences. As such, it can be used to gain accurate and real-time insight into constantly changing user preferences.

For these reasons, the paper tries to fill the gap in both the area of focus of young travellers' experience and the methodology of research, suggesting a constant iteration and assessment of the study on the topic.

1.5 Research aims and objectives

This thesis seeks to explore a unique approach to academic research that better serves the rapidly changing needs of innovative industries, such as technology and IT, by emphasising user experience and iterative processes as part of a continuous research cycle. This approach would allow for a more hands-on and solutions-driven approach to academic research, leading to the direct implementation of findings to aid in advancing any industry.

This study seeks to investigate the motivations, aspirations and perceptions of young individuals in order to generate future-oriented insights into the travel industry. Key factors to this study have been the employment of free-flowing interviews and behavioural analysis aimed at understanding the participants through empathy, avoiding pre-determination and generalisation of the information collected. Product design strategy often seeks to alter consumer buying decisions or to influence behaviour. Such a product-driven mentality has led many organisations into a difficult position. Even when product design teams attempt to benefit a consumer, they frequently find that they have inadvertently caused dissatisfaction due to a lack of understanding of the individual's perspectives and approaches. Active and genuine listening can allow a team to gain insight not always easy to identify with canonic methods. Indeed, the information and knowledge that emerges from listening and empathising with the user, is considered here extremely valuable in facilitating the individual in achieving their goal in a manner that is more in line with their mode of thought.

1.6 Organization of the thesis

In Chapter I, an introduction of the thesis is provided. Chapter II will present an exploration of the literature concerning Generation Z and its definitions. The third chapter provides an overview of the current state of the travel industry, presenting data and trends, with emphasis on the discourse regarding new innovations in the industry and their effects on the way people travel. Moving forward on Australia, as the focus destination, an account of the travel industry in the country is provided in Chapter IV. Chapter V is devoted to the methodology used to collect and analyse data for the explorative part of this study. The findings are then presented and discussed in Chapter VI, with reflections and recommendations for further research offered in the concluding Chapter VII.

Chapter II

UNDERSTANDING GEN Z TRAVELLERS

2.1 Introduction

Generation Z is a demographic cohort composed of individuals born between the mid-1990s and the mid-2010s. This generation comprises a large and powerful group of individuals who are now entering adulthood, increasing their potential to influence the world economy.

This cohort is the most diverse generation to date, with the highest number of multicultural, multiethnic and multiracial members (Pew Research Center, 2019). Gen Zers have grown up in a globalised and digitalised world and are considered to be the first 'true digital natives', having been exposed to a variety of digital technologies since their early childhood. They are seen as more risk-takers and independent than their predecessors and considered socially conscious and interested in sustainability, globalisation and human rights. Not only, Gen Z members are also more likely to be self-expressive and open to experimenting with new activities and lifestyles.
Understanding how these characteristics fall back on these young adults' attitudes towards travel and how they shape their preferences and needs when they are on the move is essential in order to design and market innovative products and services that will cater for new requirements, providing meaningful and memorable experiences.

This chapter aims to define Generation Z and explore the key characteristics of this newly emerging generation of travellers. The sociological definition for generational cohorts will be outlined and discussed, along with its limitations. This will be followed by an overview of the generational characteristics that define Generation Z, as presented by the studies consulted, in terms of demographic definitions and psychographic insight on observed common values, attitudes and behaviours shared by this group. The main differences with the previous generation, the Millennials, will also be mentioned for better contextualisation.

Secondly, the chapter will overview how Gen Z's relationship with travel is defined and categorised by the existing literature, and how generational characteristics influence the way these young adults travel.

2.2 Generation Z: definition and characteristics

Despite the extensive research conducted on defining generation cohorts, there is still disagreement concerning the temporal boundaries of any given generation and the terminology to be used to designate them. Generations are often considered in terms of their duration, according to the Generational Theory of Howe and Strauss. Yet, today there is no consensus regarding the ideal length of this time period, and no precise science exists to determine exact cutoff points.

However, the utility of determining generational cohorts is to gain insight into how diverse formative experiences, such as global events and shifts in technology, economics and culture, interact with the ageing process and the life cycle of individuals, determining their view of the world. As Twenge et al. (2010) recognise, generation theories can be used to generalise cohort differences for a more comprehensive understanding of the profile and attributes of prototypical members of a particular generation. Therefore, generational cohorts should be seen primarily as a tool allowing researchers to analyse alterations in perspectives over time rather than prescriptive closed categories. In fact, it is possible that historical, technological, behavioural and attitudinal data would reveal more of a continuum across generations than a distinct threshold. This suggests that the differences within generations can be as pronounced as those across generations: the youngest and oldest members within a commonly defined cohort may have more in common with adjacent generations than the one to which they are assigned. This ultimately serves as a reminder that generations are inherently complex and diverse, not simply reducible to stereotypical characterisations (Pew Research Center, 2019).

When it comes to younger generations, variations within single cohorts can be even more pronounced, since worldwide and disruptive developments and innovations proceed at an ever-increasing pace over time. As a consequence, when it comes to economic sectors and consumer behaviour, treating Generation Z as a homogeneous group could be a misguided approach as there are notable differences between those in the older and younger sections of this demographic. For example, those born in 1997 or soon after are likely to have very different experiences, values and behaviours than those born more recently. Empirical data from some of the consulted studies have indeed confirmed the above-stated vision, showing inconsistency and variety among the results and findings regarding attitudes and behaviours of the participants, all comprised within generation Z, demonstrating the impossibility of homogenising an entire generation under sealed characteristics and boundaries (Robinson, 2018).

As far as the above-stated sentiment is elucidating and eye-opening on the limitations of generational theories, the literature reviewed agrees with treating Generations as a homogenous cohort for the main traits it presents.

For this research purpose, this thesis agrees with the definition provided by the Pew Research Center, which places the final birth year for Millennials as 1996, thus identifying anyone born after 1997[2] as part of a new generation, Generation Z. The generation will be treated as homogenous from the literature review perspective, as the studied analysed do. However, variations observed in the analysis and interpretation of the collected data will be presented in Chapter VI.

As for the terminology, there is no scientific method for determining when a name has become firmly established. However, the current trend appears to be in favour of the term 'Generation Z' (also 'Gen Z', 'Gen Zers' or 'Zoomers') over the terms 'iGeneration', 'Homelanders' and 'Post-Millennials'. Evidence is also supported by sources such as Merriam-Webster, Oxford and the Urban Dictionary, as well as by Google Trends data, which demonstrate that this term is being sought out more often than others (Pew Research Center, 2019).

2.2.1 Shaping common traits

According to the sociological perspective outlined in the preceding section, individuals within each generation are subject to the influence of political, economic and cultural contexts in which they grow up and live. The effect of unique historical events shapes

[2] Generation Z is followed by the 8th generation, often called Generation Alpha, though the naming convention and definitions are still evolving. This group includes those born after the years 2010-2012.

their values and beliefs, as well as their mentalities and lifestyles. Some important events shaped the world post-Millennials were about to approach right before their birth and continued shaping their lives, accompanying them to adulthood.

While most Millennials were raised in the aftermath of the wars in Iraq and Afghanistan, and they were between the ages of 5 and 20 when the 9/11 terrorist attacks occurred, old enough to comprehend the historical significance of the event, the majority of Gen Z members have little to no memory of it. Also, Millennial's life choices, future earnings and entrance to adulthood have been significantly shaped by the economic recession, experienced as they came of age and entered the workforce. On the other hand, the 2008 financial crisis and subsequent economic crisis, the terrorist attacks and the rise of populism have shaped and compromised the social, political and economic environment in which Gen Zers have grown up, causing inevitable repercussions on their families. Although the recession is likely to have a longer-lasting effect on Millennials than it will on younger generations, bearing the brunt of this economic crash has driven people worldwide to be more fiscally responsible and value financial stability.

The global pandemic of COVID-19 had a significant impact on the psychology of Generation Z members, who were for the most in their formative years during the lockdown. Long-term implications caused by the disruption of typical educational experience, an economic downturn in the job market and repercussions on the mental health of many young adults and individuals have brought an increase in symptoms such as depression, anxiety and loneliness, already largely present among this demographic (Garnham, 2022). Financial pressures combined with any emotional distress fostered feelings of helplessness and hopelessness as social distancing measures had an impact on their ability to socialise and build meaningful relationships.

Environmental disasters, such as wildfires, unprecedented heavy rains and floods, tsunamis and earthquakes, and extreme heat, together with other industrial disasters, have highlighted the need for immediate action on climate change and welcome the path for activism and social responsibility. Embracing the hope for change, Gen Z has often been seen as the most conscious generation, actively engaging and initiating constructive conversations around sustainability and future implications associated with global warming. The Pew Research Center (2021) reveals that Millennials and adults belonging to Generation Z in America are demonstrating higher levels of involvement both on and off-line compared to older generations. In 2021 Deloitte conducted a study which revealed that climate change and environmental issues were of utmost concern to Generation Z.

Ultimately, the current war in Ukraine has resulted in a heightened sense of insecurity and fear about the future, as well as an increased awareness of the delicate equilibrium in international politics and economics dynamics. Seemiller and Grace (2016) observed that fear of disaster and tragedy, economic hardship and the emergence of populism are some of the key factors shaping the contemporary context. Read and Truelove (2018) assert that Generation Z has been raised in a world of war and terrorism, leading them to prioritise safety and financial security. Hertz (2016) conducted an 18-month-long survey on teenagers in the UK and USA, which revealed that this generation feels deeply anxious and distrustful, correlating this sentiment to the unpredictable socio-economic climate in which they have developed their personalities and life skills.

The rapid evolution of technology, specifically in terms of communication and interaction, is another great generation-shaping factor. As the first digital natives, Gen Zers have little or no recollection of a world without smartphones. Technological advancements and the introduction of new communication mediums have been a constant in their lives since their birth leading to both positive and negative shifts in youth behaviours, attitudes and lifestyles. The use and abuse of smartphones and social media are considered critical elements in sharp shifts in teen behaviours and emotional states, leading to more vulnerability and unhappiness (Twenge, 2017). Studies have shown that this generation is far lonelier than previously thought. Chicca and Shellenbarger (2018) found that due to their extensive use of technology and social isolation, Gen Z's ability to form healthy relationships with each other is weakened. As a result of this decreased interaction between individuals in society, they are at an increased risk for developing mental health problems like anxiety and depression.

On the other hand, being grown up in the online environment, it seems that Gen Z is trying to rediscover the outside world, recognising the impact that a continuous and addictive connection is having on mental health. In fact, although spending much of their time engaging in virtual technologies, such as social networking, gaming and text messaging, Gen Zers long for physical connection and togetherness. A survey conducted on these youths (Hertz, 2016) revealed that they value and enjoy activities that include physical events. This implies that while they accept virtual communication as a part of their life, they still yearn for the tangible connections of physical togetherness.

If the above-depicted scenario may lead to pessimistic views, it is also true that in the wake of these critical historical events, Generation Z has devised some coping strategies. This generation is characterised by its determination to make a positive impact on the world. Lanier (2017) observes that members of Generation Z have shown a pragmatic approach to life, presumably shaped by the experiences of living in an era marked by the global recession and technological advancement. Chillakuri (2020) states, in relation to the working environment, that Generation Z is characterised by an entrepreneurial spirit, focus on tangible results, mastery of modern technology, ambition, self-teaching capabilities, autonomy, self-assurance and independence from their families. This phenomenon has resulted in an increased focus on career development as well as heightened levels of caution towards safety, security and privacy. They are highly motivated and have adopted an independent, self-learning approach to acquiring knowledge and perfecting their skills (Chillakuri, 2020). Being highly educated, Gen Zers are more likely to be creative and innovative and be able to multi-task in an increasingly changing environment (Corbisiero and Ruspini, 2018). The omnipresent connectivity and the continuous flow of information have enabled Generation Z to access limitless interests and avenues for learning, being able to research and explore areas of knowledge and topics previously inaccessible or difficult to reach. This has led to an increased level of engagement and curiosity and increased access to learning opportunities both inside and outside of the traditional classroom setting. Francis and Hoefel (2018) also reported that traditional institutions are losing popularity against online learning.

The use of innovative technology and the rise of social media has enabled Gen Zers to develop a greater understanding of different cultures, languages and global events, furthering their awareness of the world around them. If Millennials have been delineated as the most racially and ethnically diverse adult generation in American history, in relation to their influence in the 2008 election of the first African-American president, the next generation is characterised by even greater diversity, close to being the most educated generation to date (Pew Research Center, 2018)[3]. The globalised nature of communication and collaboration among Generation Z has created a shift in the dynamic between intergenerational peers, resulting in this cohort having more in common with their international peers than those of the older generations in their home country. This notion of a 'boundaryless generation' suggests that Generation Z encompasses a considerable sense of connectivity which transcends national and cultural borders (Jenkins, 2017a).

Demonstrating to be more socially conscious, above all through online activism, young people have been exposed to progressive ideas and encouraged to be active participants in social change. In clear relation to this trend are events such as the legalisation of same-sex marriage in 2015 and social movements such as Black Lives Matter in 2013.

2.2.2 Consuming behaviours

As they reach milestones such as graduating from school and leaving home to pursue higher education, young people may experience a period of significant growth and transformation, both psychologically and financially. Along with the newfound freedom and independence from parents and caretakers, students may find themselves with an

[3] The parents of post-Millennials are better educated than the parents of previous generations, and this pattern most likely contributes to the relative affluence of the households in which post-Millennials live. The oldest post-Millennials are less likely than their predecessors to be in the labour force. This notion is further substantiated when considering the median household incomes of post-Millennials, which surpasses that of prior generations at the same age, most likely due to the higher levels of education held by their parents. (Pew Research Center, 2018)

increase in buying power as they attain new levels of autonomy. These same individuals may face additional changes in their lives as they enter and graduate from university and embark upon their desired career path. All of these events that serve to enhance their personal, professional and financial growth, draw important consequences in the consuming behaviours of each individual.

In accordance with the above-seen characteristics and traits, Wood (2013) outlines Generation Z's consumer behaviour as being based on four core characteristics: interest in new technologies, with high expectations on digital tools and constant innovation; reliance on convenience in terms of costs, time and usability, as a consequence of parental upbringing and economic instability, but also fast-paced lifestyles; a fear for financial insecurity, in particular, due to perceived lack of job opportunities; and a need for temporary escapism from the realities they experience, such as Virtual Reality experiences but also in engaging in extreme sports or fostering social circles that act as substitutes for remote family members. Hoxha and Zeqiraj (2020) observed that flexibility, authenticity, choice, convenience and integration are essential components that shape Generation Z’s lifestyle patterns.

Francis and Hoefel (2018) reported that the key for Gen Z is not just to follow one stereotype, but to try out various ways of expressing themselves and forming their identities. The heart of the matter regarding this generation lies in one's capability for personal expression. Therefore consuming items is not about fitting into a certain group but rather an opportunity for multiple self-expressions. They also noted that Gen Zers recognise the value of conversation and are tolerant of different views within the organisations they engage in and their own families, being their consumption patterns are guided by their search for truth.

Consumption for Generation Z and young age groups no longer means solely owning products or services. Instead, being able to access them is what is most important. This shift towards access has made possible an abundance of goods and services that create value. Many products now come in the form of services, and these services offer connections with consumers (Francis and Hoefel, 2018).

Gen Z is constantly on the lookout for products and services that can be accessed instantly, with a strong preference towards just-in-time delivery. This generation prioritises convenience and immediacy when making their decisions. They expect easy accessibility and instant gratification (Jenkins, 2018). Bewicke (2022) found that Generation Z individuals are typically well-informed when it comes to making purchasing decisions, often taking the time to research and consider their options before committing to a purchase. This attitude has also been increasingly facilitated over the years by advances in technology and the availability of information. According to Francis and Hoefel (2018), members of Generation Z, with access to a huge amount of data, are more practical and logical when making decisions than those in previous generations. They especially appreciate being aware of their environment and having power over their decisions. YouGov's report (2022) on travelling behaviours states that, when it comes to their outlook on life, Gen Z adults (aged 25 and under) are slightly more experimental than their older counterparts, tending to be more receptive to new experiences and challenges. They are also more likely to agree that they are not afraid to take risks with their own finances, and tend to be more impulsive when making purchases.

Generation Z is guided by values such as authenticity and transparency, community and family, human equity, individuality, personal success and ambition, financial security and independence. Their tendencies lean towards brands that act transparent and virtuous, placing high importance on brand ethics and corporate responsibility. Characterised by substantial social and ecological consciousness, Gen Z consumers are keen to acquire knowledge concerning the origin of products, as well as their methods of production and associated brand philosophies beyond product and service offerings. They are typically well-informed about the brands they purchase and the truths behind them. However, if they lack knowledge about a certain product or company, they are able to quickly access information and form their own opinion. In relation to that, they are also less receptive to conventional advertising and marketing techniques. Authenticity is sought in the interaction with brands as well, meaning traditional promotional messages are likely to fail in garnering their attention and support (Francis and Hoefel, 2018). Companies looking to establish relationships with this demographic should focus on engaging them through multiple channels by initiating meaningful conversations. Relevance and quality of content are key, as it may easily encounter criticism or indifference from this demographic.

Gen Zers demonstrate deep apprehensions about the planet's condition, seeking out brands that reflect their moral values. Gen Zers are much more likely to value environmentalism, conservation of resources, and reduced consumption. They are more likely to take an active role in promoting sustainable development in their communities (Entina et al., 2021). Brands are expected to be decisive on a range of sociocultural matters in addition to having an advantageous effect on society as a whole. Generation Z also increasingly expect brands to reflect a more realistic portrayal of life and portray people of all genders, sexualities, races, and backgrounds in a positive light. Marketing messages that depict a non-diverse, utopian world won't resonate with them. Interestingly, Klopotan, Aleksić and Vinković (2020) found that the ethical conduct of Generation Z individuals is shaped more by individual values than prescribed regulations and guidelines.

Gen Z’s consuming behaviour also put a significant emphasis on collective engagement, community, social activism and peer-to-peer sharing for purchasing decisions. Heavily relying on technology and digital platforms for socialising, Gen Z look toward collective engagement as an essential part of the buying process.

Enabling co-creation through two-way conversation with brands is another key element in catching Gen Zers’ interest. This involves understanding Gen-Z's motivations and aspirations, and providing them with personalised and empowering experiences. Members of Generation Z are demonstrating a shift in their value system, preferring actively co-created items over passively consumer-led ones (PSFK, 2022). As technology has become prevalent in society, it has allowed this generation to become more involved in their interactions with the products, services and media they consume. Seeking to generate meaningful contributions, this generation of ‘makers,’ ‘creators,’ and ‘inventors’ prefer to craft their own content, rather than relying on traditional consumption habits that exist outside of their direct control. This translates to a notable appreciation for activities and experiences which allow them the opportunity to make a direct impact or imprint their voice on these products and services. Additionally, a sense of self-sufficiency is often associated with these activities and achievements, which aligns with Gen Z's determination to make progress and take control of their own lives without relying on outside sources.

2.3 Generation Z and travel

According to the YouGov Global Travel Profiles survey conducted in 2022 across 25 major markets, 75% of Gen Z individuals are willing to take some form of travel within the next 12 months, planning for two or more trips in that time period. However, only 16% of Gen Zers are planning on taking international vacations, reporting the most willing in the European markets.

The oldest members of this generation have recently become of legal age and gained the ability to travel independently. Understanding Generation Z's attitude towards travel is important for many reasons, including the ability to gain insight into the values that guide their decision-making and to better understand how they shape the dynamics of the travel industry. According to Robinson and Schänzel (2019), demographic changes have a significant effect on the tourism industry, necessitating further research into different demographic populations and their decision-making processes. Negrușa and Toader (2018) argue that, although there have been many studies in the literature in the past decade that investigate generational influences on work attitude, work satisfaction, managerial style and buying behaviour, there are very few that focus on identifying differences between generations when it comes to spending free time and engaging in leisure activities.
This section aims to collect and report all of the meaningful and relevant insights that can relate to Generation Z's travellers' consumer behaviour.

2.3.1 Travelling behaviour

Travelling offers experiences that can open minds, give insight into other cultures, and shape personal growth. For Gen Zers, travelling is a way to get to know themselves better, cultivate new skills and connect to their peers worldwide. It provides an opportunity to escape the routine life and try something different, challenging the status quo. This cohort sees travelling as a chance to explore, discover and expand their horizons. It gives them the chance to visit places they have dreamed about, meet people with diverse sets of beliefs and opinions, and learn something new. Travel is seen as an opportunity to plan one's life and build self-identity through self-discovery and self-reflection. To this generation, travelling is a statement of independence, adventure, and a combination of fun experiences with meaningful growth. Moreover, through travelling, individuals are able to engage in explorations of identity both digitally and physically. This enables them to evade the conformity associated with their regular lives while still being interconnected online with friends and family at home. This provides a unique opportunity to experience physical distance from society but also maintain social connections via technology at any given moment, offering dual benefits for those looking to broaden their horizons.

The influence of those factors can be observed, for example, in the preference for alternative forms of accommodation and the use of digital tools and social media to facilitate the travel experience, as well as in the interest in social and global issues, which has led to a preference for purpose-driven journeys and a desire to explore new cultures and destinations. Gen Zers are increasingly eco-conscious and seeking out experiences that connect them to the environment, appreciating sustainable, off-the-beaten-path trips. They are demonstrating a tendency to diverge from traditional destinations in pursuit of a unique experience. This is indicative of their open-mindedness and curiosity, which drives them to make unconventional choices.

Furthermore, this generation appears to be well-informed about their desired destinations, suggesting an acute awareness of what they want to get out of their travels. In a market oversaturated with options, Gen Zers have become savvy about their decisions and bucket-list-oriented (Albanese, 2019). They have high expectations regarding their travelling experiences, seeking socialisation, fun and autonomy together with convenience and a good price-quality balance. This is exemplified by their purchasing behaviours, which are often characterised by last-minute decisions, a focus on seeking out good deals, making use of word-of-mouth recommendations when deciding on a destination, and a tendency towards using low-cost services (Mignon, 2003).

Not by chance, this group has been identified as challenging in terms of retention due to the complexity of its motivations, values, concerns, priorities and interests. The following paragraphs will expand and discuss more in detail the main behavioural drivers of Generation Z.

a. Authenticity, meaningful experiences and unique adventures

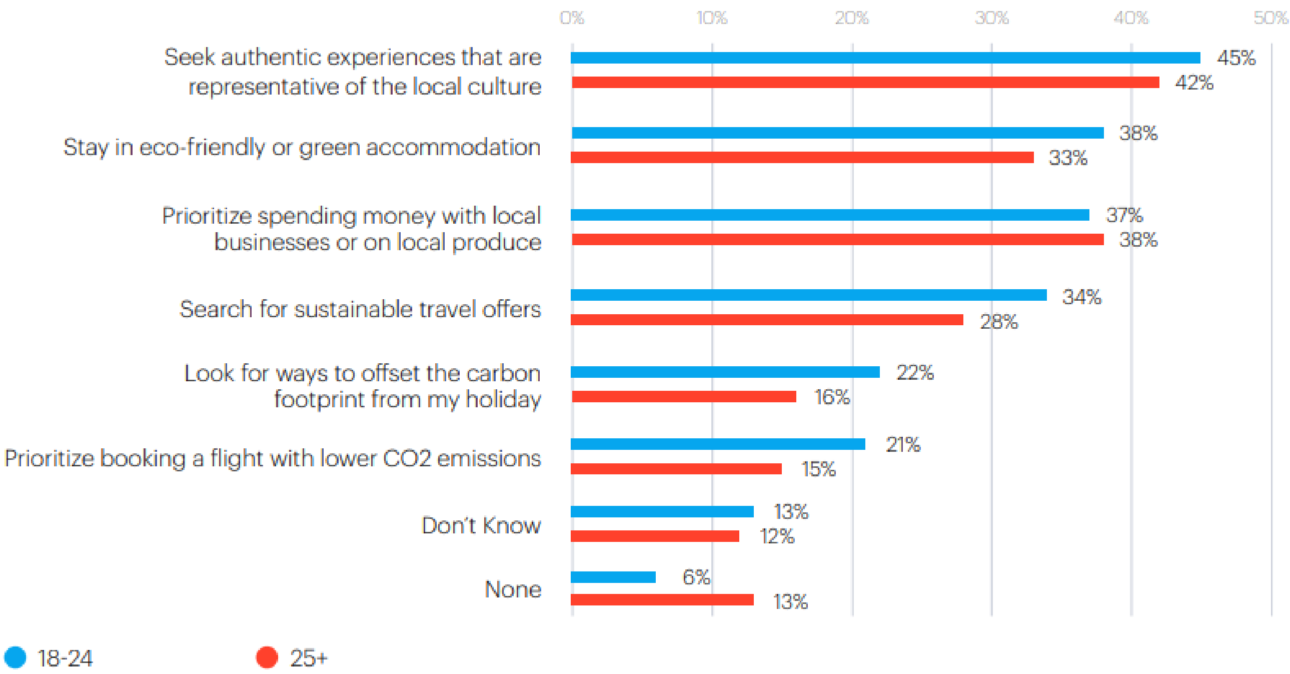
Gen Zers are the most likely demographic to engage in international travel, diverging from the traditional and established destinations that prior generations may have favoured. They tend to prefer exploring unconventional and pristine places and experiencing local cultures more deeply than through sightseeing and group excursions, valuing the 'living-like-a-local' approach. Types of vacations which facilitate a deep connection with local communities, emphasising a desire to experience their authentic culture, have become increasingly popular. This attitude reflects the concept of sustainable tourism, as commonly defined by the UNWTO, which aims at creating an equitable and stable balance between visitors and the host society, which must ensure the preservation of resources necessary to fulfil current needs while safeguarding enough provision for future generations.

Young adults are more likely to choose holidays in which the purpose is a driving factor, such as volunteering and eco-tourism. This reflects a growing intention to engage in meaningful activities which contribute to the host community. YouGov's Global Travel Profiles (2022) reveal that they have a strong desire for understanding more about foreign cultures, traditions, heritage and food, and to build real-life experiences while travelling. They seek to enjoy vacations through unique activities and desire to give back to the local community in a positive manner, although with limited funds, prioritising spending money with local businesses or on local products. Haddouche and Salomone (2018) also found the need to make experiences with the local people as an opportunity to meet other cultures and an occasion for rethinking the self - although it appears that the real occurrence of these encounters is often rare for many different reasons.

Interestingly, a study conducted by the European Travel Commission in 2020 has revealed that Generation Z is often inclined to be interested in the youth culture of a country, including food, fashion, music and other cultural trends that peers of other nationalities follow. Urban culture, the lifestyle of inhabitants, local cuisine and customs, coupled with native heritage and culture, are integral elements that shape a place and assist visitors in quickly comprehending a destination.

Members of Generation Z are also likely to be attracted to active experiences, with an openness to alternative accommodations and the use of the sharing economy. Moreover, Gen Zers are striving to set themselves apart in an increasingly homogenised world, seeking and employing creative content to achieve this distinctiveness. This is seen in the attempt to pursue visually stimulating destinations and uniquely engaging activities. Activities like hiking, mountain biking, canoeing, kayaking, rock climbing, river rafting, skydiving, zip-lining, paragliding, bungee jumping and camping and trekking to remote and extreme locations have become increasingly popular among this demographic group.

Figure 1: *Things would consider doing on your next vacation (Global)*



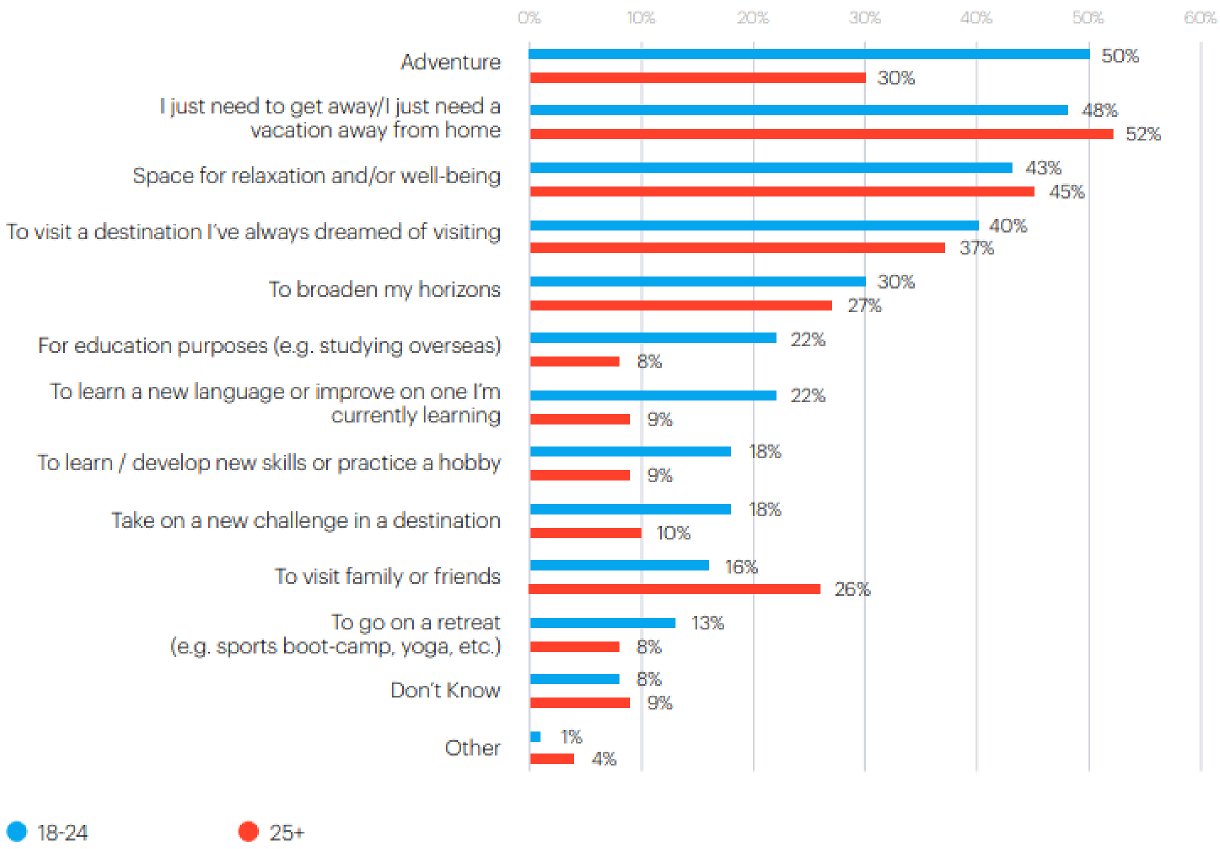
Source: *YouGov Custom Research, April 2021*

b. The desire for self-development and personal growth

Generation Z perceives travelling as a vehicle to widen their minds, fulfil their aspirations, and refine their abilities and understanding of the world, while both educating and fascinating themselves. YouGov (2022) reported that, globally, individuals aged under 25 are less likely to say that their primary motivation for travelling is just to get away or relax, as opposed to seeking personal fulfilment and enrichment from what is often seen as a life experience. Among the main reasons, there is the desire to broaden their horizons, develop a new skill and other educational purposes. Workshops, classes and other educational experiences are becoming increasingly popular among service providers as the demand for additional value to the traditional and passive visit approach is rising.

Those experiences give the travellers long-lasting value in relation to self-development and growth. Examples are increased cultural appreciation and understanding, adaptability to different surroundings, improved problem-solving skills, language acquisition, greater flexibility, self-confidence and resilience. Challenges are seen as opportunities for growth and are faced optimistically. Developing independence by having to take on responsibilities, such as planning their travels or learning how to survive in unfamiliar environments through trial-and-error tactics and decision-making, without relying on guidance from those around them, creates a heightened sense of accomplishment that boosts areas of self-esteem and confidence levels. Travelling in itself is then seen as an adventure, to which the opportunities to offer added value are many.

Figure 2: '*What are you looking for when on vacation (Global)?*'



Source: YouGov International Omnibus study, carried out in 8 countries from 21st March to 30th March 2022.

c. Convenience and deals-seeking

Among those aged between 18 and 24 years old, the increasing value consciousness has resulted in a core influencing factor when it comes to selecting a travel destination: the draw of a good deal. Southan (2017) has highlighted that Generation Z travellers are particularly cost-sensitive, often choosing to begin their travels with a less defined agenda. They also intend to secure short-term employment in order to supplement their travel budget. Haddouche and Salomone (2018), as well, recognise that financial constraints represent an important factor taken into consideration by Gen Zers when making decisions concerning mobility and displacement. YouGov (2022)[4] also

[4] In detail, the data reported that: "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. [...] 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

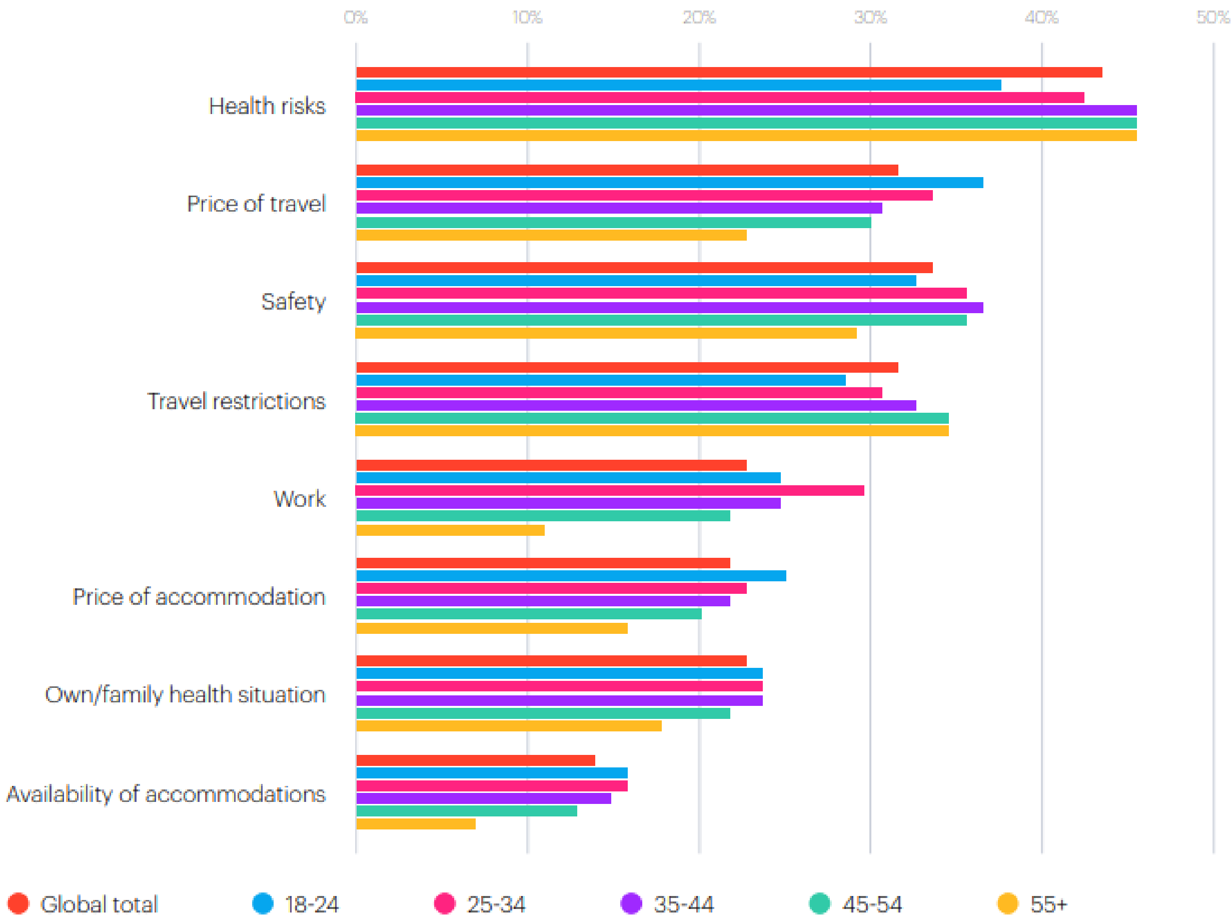
confirmed that the prices of both travel and accommodation are perceived as an obstacle for young travellers, suggesting heightened sensitivity to cost. They also found that as individuals age, it appears that the influence of budget on travel-making decisions diminishes. This may be attributed to increased financial stability due to career progression.

The causes of this inclination towards more responsible economic behaviours and the preference for convenience are probably to be found in a mix of parental attitudes[5] and the advancements in digital technology. This has enabled Generation Z to be more mindful of the resources they are using and to make more informed decisions when it comes to spending their money, seeking budget-friendly alternatives and personalised deals. As a consequence, they are slightly more likely to opt for staying in hostels, renting rooms in other people's homes, campervans, and couch surfing. However, although the price is more of a barrier to Gen Zs, they are open to higher-end experiences in their repertoire of accommodation types. Notably, convenience not always means the cheapest option. Gen Zers would make their quest and search for the best deal that balances value with price, open to spending more for a greater return. In relation to that, Subawa et al. (2020), found that the general trend of prioritising price over quality has seen a shift with Gen Z, showing preferences to value and buy quality products but at a lower price.

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." (YouGov, 2022)

[5] Generation X was profoundly affected by the Great Recession and, consequently, more heavily emphasised fiscal responsibility and self-reliance to their children. This difference in parenting styles is reflected prominently in Generation Z's approach to travel decisions and expenditure of discretionary income; they are demonstrably self-directed and judiciously aware of how they are spending money. (Albanese, 2019)

Figure 3: '*Travel obstacles by age (Global)*'



Source: YouGov Global Travel Profiles, April 2022.

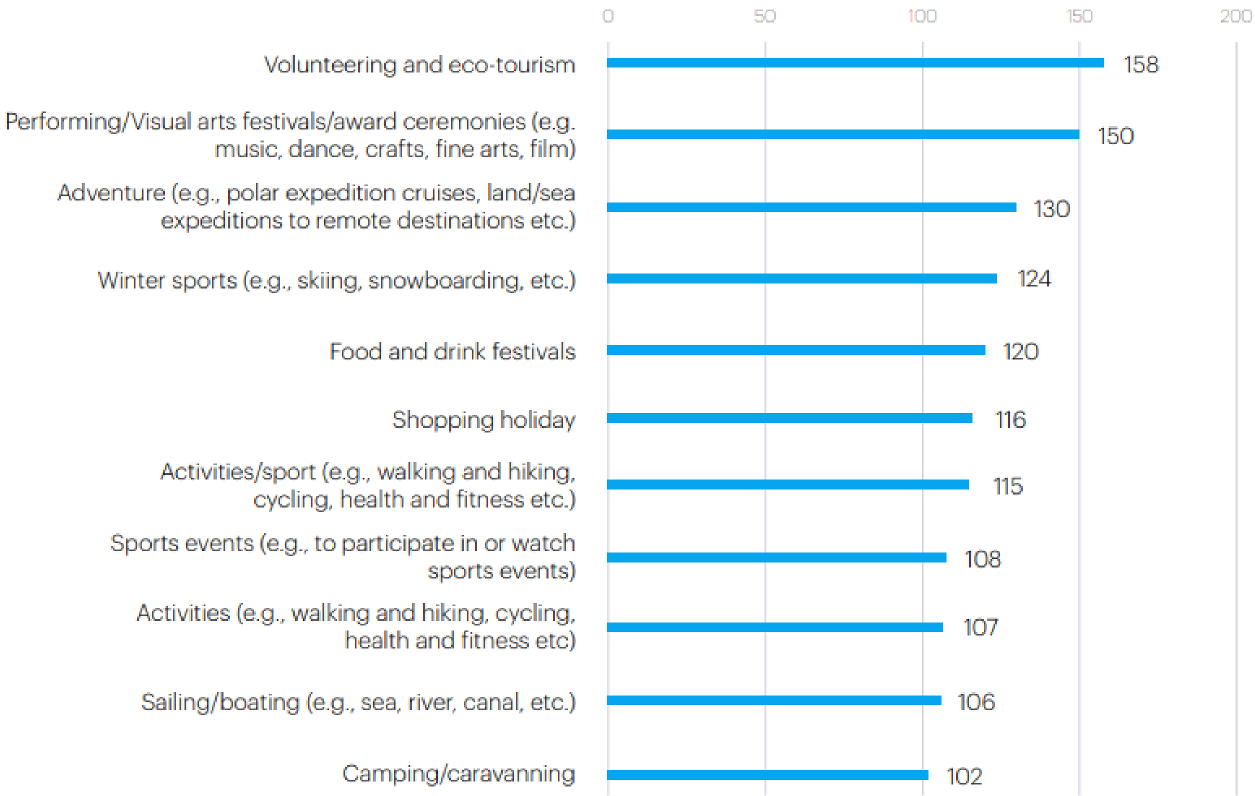
d. Environmental Sustainability

According to the Pew Research Center (2021), younger American generations, comprised of Millennials and Generation Z adults, are noticeably more engaged on the issue of climate change than their older counterparts. Aside from discussing the necessity of addressing climate change, these groups are discovering more content related to the issue online, and they are engaging in collective activities such as volunteering, attending rallies and protests to actively promote the cause.

As a consequence, in terms of travelling, Generation Z is increasingly prioritising sustainability when planning their travel endeavours. They will thus search for and prefer trips that are environmentally friendly, with sustainable practices being employed by their chosen providers. YouGov (2022)[6] confirms a more environmentally conscious approach among Generation Z travellers. Interestingly, Haddouche and Salomone (2018), in a qualitative study aimed at understanding Gen Zers' travel experiences - specifically uncovering "to what extent this tourist segment is sensitive to the notion of sustainable tourism" - found that the young people interviewed did not appear to prioritise sustainable tourism as a key concept, never mentioning it in a conscious or apprehended way. This contrast in behaviour is more likely due to differences in age, although within the same generation, suggesting that younger individuals have not yet developed a proper understanding of the matter in the context of travelling. Nevertheless, the majority of studies believes that Generation Z plays an essential role in developing a stable and long-term future. They are the most strategic parts of creating sustainability, by channelling their innovative ideas for creative solutions which can be applied to have a positive effect on our environment.

[6] In detail, the data reported that: "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 searching 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 prioritise 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 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." (YouGov, 2022)

Figure 4: '*Vacation types Gen Zers over-index against over 25s (Global)*'



Source: YouGov Global Travel Profiles, April 2022.

e. Privacy and safety

Haddouche and Salomone (2018) noticed a retaining attitude among their participants towards sharing too much content online while on vacation. A key motive for them to keep their distance from the collective rituals of sharing was to protect their privacy, as a way to signify their self-affirmation and individualisation, limiting the use of social networks to specific functions, such as maintaining basic connections with family and friends or immortalising the present moment to create a memory[7]. Generation Z's concern about privacy and the use of personal data is also stated by Jenkins (2018), who assumes a return to more traditional values. Francis and Hoefel (2018) found that, although expectations of personalization are high, individuals have yet to show a full willingness to share their confidential data with corporations.

[7] The results come from responses of young travellers aged between 14 and 18, often travelling with parents. For this reason, caution must be observed in considering those findings universally valuable for the totality of the Generation Z.

As for the perception of being safe, according to YouGov (2022), safety is ranked quite high as a factor preventing Gen Zers from travelling, with a global total of around 33%. This is likely due as a consequence of the pandemic and the international political instability of the present day.

f. Tech and innovation

Members of Generation Z were born into a digital culture in which widespread internet use and access to information have become the norm. As such, this cultural phenomenon has impacted their values, perspectives, objectives and overall outlook on life (Subawa et al., 2020).

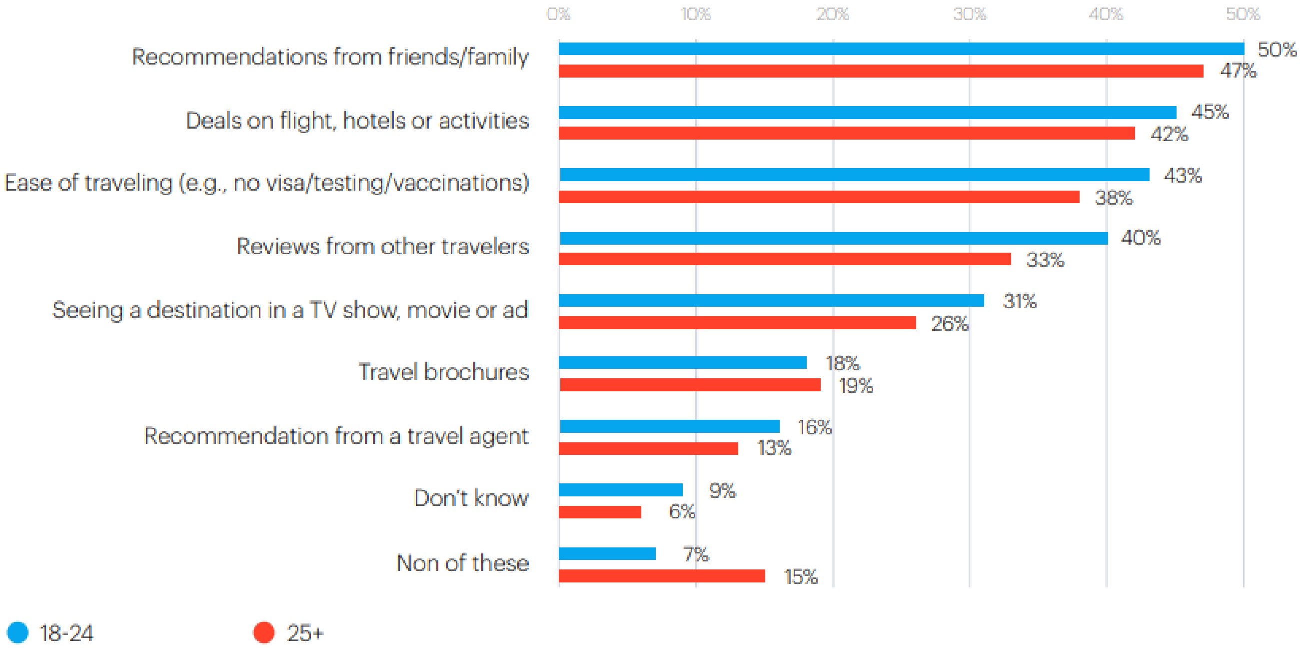
Today, Generation Z is exemplifying a trend towards chat-based bookings, virtual tours of potential destinations, and other technologically advanced methods of creating a more seamless and convenient journey. Wi-fi, phone chargers and remote check-in and check-out process are becoming requirements. The use of devices and social media to share their experiences has become a way in which they build their identity.

Social media plays a key role also in terms of decision-making to the point that Gen Zers use them as a source of authentic travel inspiration, rather than relying on travel marketers[8]. By being hyper-connected while on vacation, individuals are able to have greater flexibility in crafting their journeys and accommodation to their personal preferences. With the ability to research, compare prices, read reviews, and book services online, they can customise their vacations to their specific requirements, thus creating unique and memorable experiences. In this manner, they effectively take on the role of a travel agent in curating their own tailored vacation.

The future implementation of AI technologies will enable even further easier access to information, facilities and locations, making the whole process of planning a trip completely painless and incredibly fast.

[8] YouGov Global Travel Profiles (2022) 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.

Figure 5: '*Factors influencing travel destinations (Global)*'



Source: *YouGov Custom Research, Oct 2021.*

g. Other major factors

Other recurring themes identified by the existing literature are the emergence of solo travels, accessibility to information, ease of getting around, flexibility in planning and brand loyalty.

Solo travel is the practice of travelling independently, unaccompanied by friends or family. It is becoming increasingly popular among travellers who seek to experience the world in a more personal way, free from the restrictions and influences of companions. Solo travel allows for an increased level of autonomy, flexibility and convenience, as the individual is able to explore and experience new places and cultures at their own pace. Furthermore, it is often seen as an enhanced form of self-discovery and personal growth, as it involves taking risks and facing challenges that can be difficult to experience when not in the company of others. The 2018 Solo Travel Trends survey conducted by YouGov for Agoda found that relaxation and taking time to unwind was the most popular motivator for solo leisure travel globally (61%), compared to 48%

when travelling with friends. Many sources[9] also show that the number of women in this practice of travelling is increasing and overcoming the male group. Although the Millennials generation is credited with making solo travel a trend, Generation Z is following the wave. Data collected in Expedia Solo Travel Report 2019[10] has revealed that Millennials are particularly likely to seek to disconnect (36%), whereas Gen Zers are more likely to be motivated by self-discovery (34%) and meeting new people (32%). In addition, American Gen Zers are more likely to participate in solo travel groups (22%), stay with a host family (20%), and make use of social media applications (12%). The solo travel trend is gaining momentum, particularly after the COVID-19 pandemic. According to Booking.com data, prior to the pandemic, only 14% of travellers were planning a trip on their own, while nearly double (23%) in 2021 say they will be planning a solo trip in the future. During the pandemic, people have had to rely more heavily on themselves for entertainment and activities as public venues have been closed. This may have resulted in an increased preference for solo experiences and a greater emphasis on individualism. The 2019 *Destination Gen Z* report from Booking.com[11] reveals that independence is a high priority for those aged 16 to 24, with 34% planning to travel alone. The Expedia Solo Travel Report (2019) also indicates that 60% of travellers intend to take a solo trip within the next year. The report also shows that 33% of Americans would rather travel solo with their device than bring a travel companion on their next trip. Google searches have revealed a 131% increase in searches for solo travel between 2016 and 2019, indicating a comeback for the solo travel trend in recent months. Solo travelling can provide opportunities for

[9] Approximately 47% of travellers with Overseas Adventure Travel in 2020 is registered as "solo," with an impressive 85% of these solo travellers being female. The number of Google searches for 'solo women travel' experienced an astonishing 230% increase in 2019, compared to previous years. Pinterest has reported a 350% increase among women pinning articles related to solo female travel. (solotravelerworld.com, 2022)

[10] The survey was conducted online by CITE Research (www.citeresearch.com) on behalf of Expedia, among 1,516 over 18 years old solo travellers in US and Mexico, who have taken a trip by themselves in the past or plan to do so in the future.

[11] Research study commissioned by Booking.com and independently conducted by Vitreous World between May 1 and May 16, 2019, which surveyed a sample of 21,807 respondents aged 16 or over (25% of whom were aged 16-24) in 29 markets. The survey was carried out online, and the analysis was operated by Ketchum Analytics. Specifically, the survey included 1,000 respondents each from Australia, Germany, France, Spain, Italy, China, Japan, Brazil, India, the US, and the UK, and 600 respondents each from Russia, Indonesia, Colombia, South Korea, New Zealand, Thailand, Argentina, Belgium, Canada, Denmark, Hong Kong, Croatia, Taiwan, Mexico, Netherlands, Sweden, Singapore, and Israel.

self-exploration and growth, while allowing the individual to actively engage with their surroundings and create meaningful connections with their environment. Additionally, travelling alone may result in increased confidence and an enhanced sense of independence, contributing as well to the creation of new friendships and interactions with locals and fellow travellers. Expedia as well (2019) confirmed that meeting new people and exploring new places are the two top reasons for American travellers to take a solo trip. Not only, the same survey shows that American solo travellers are most likely to plan trips for the summer months, ranking cost and safety as the two most important factors when selecting a destination.

Indeed, for Generation Z, travel is also seen as a period of conviviality, socialisation, and empowerment (Haddouche and Salomone, 2018). The significant increase in solo travel indicates that Generation Z is becoming more and more attracted to the freedom and independence that solo travel offers, as well as the opportunity to explore different cultures and make new connections. Interestingly, according to The 2018 Solo Traveler Readers Survey, solo travellers are highly educated and frequent travellers.

Accessibility to information is a vital component of informed, safe and successful travel, especially when travelling solo. In order to make informed decisions in an effective and efficient manner, travellers expect to be able to have easy access to information, achieved for example through free wi-fi connection and well-presented and accessible websites, digital platforms and mobile applications.

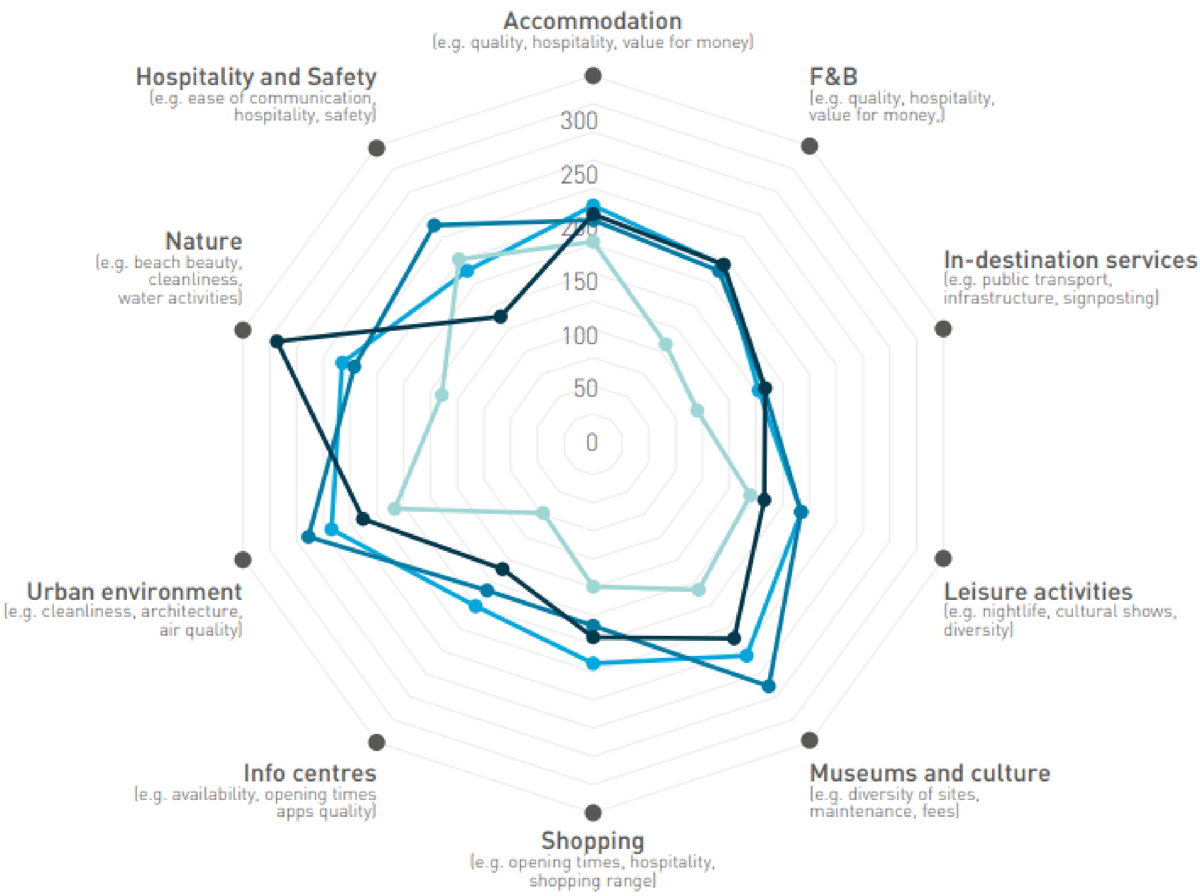
Being able to independently and easily get around is also an important factor influencing the overall experience of young travellers, letting them appreciate in a better and wider sense the destination visited.

Flexibility in planning travels has become increasingly important when dealing with unexpected events and last-minute decisions. Being adaptable to any unexpected changes that may arise in a journey is characteristic of young travellers, who are not struggling in adjusting the itinerary as new information pops up. Allowing individuals to take advantage of spontaneous opportunities during the course of their travels is a winning strategy and should be a must for any tourism products. Booking.com's Destination Gen Z research in 2019 also revealed that one in five Gen Z travellers avoid chasing must-see destinations, opting to travel impulsively and not planning in advance, while 22% reported that their preferences change too frequently.

Gen Zers are also more likely to return and give more value back to the destination over time. Upon comparison of different age groups across the world, it was revealed that Gen Z presents the strongest level of loyalty when it comes to returning to already explored places (YouGov, 2022), Confirming that brand loyalty is another common trait observed in Generation Z travellers' behaviours.

A study from the European Travel Commission (2020) also explored the factors that Chinese, German, British and American Gen Z travellers perceive as competitive advantages when visiting a destination in Europe.

Figure 6: *Satisfaction with various aspects of travelling in Europe.*



Source: TCI Research (ETC, 2020)

2.3.2 New ways of travelling

As Gen Z members embrace adulthood and start travelling independently from their families, they are adopting innovative and various ways of moving around. Exploring different ways young travellers do tourism represents a powerful insight for the development and design of new travelling product that differentiates from the classic definition of travel. Terms such as 'bleisure' travel, digital nomads and coliving-working models are on the rise in recent years.

Bleisure travel is the combination of business and leisure travel, and typically involves adding additional days onto the end of a business trip to extend the stay and enjoy the destination for personal pleasure. Covid-19 has acted as a major impetus for the integration of technology into daily life, thus transforming our working practices both quantitatively and qualitatively. Based on that change in labour opportunities, the term 'bleisure' is becoming more and more popular in the hospitality sphere (Berman, 2022). According to Booking.com[12], nearly eight in ten (80%) members of Generation Z rank getting a job as their most important life experience. However, due to their strong passion for travel, 54% of Gen Z say that the opportunity to travel for work is important when making a job selection, and nearly six in ten (57%) express the desire for a job that allows them to experience other cultures.

The lifestyle of a digital nomad varies and it can be an excellent way to experience different cultures, work in different countries remotely, create new professional relationships with people who have shared passions or interests as well as live life without too many ties. Also for some digital nomads it provides the opportunity to earn income from almost anywhere on earth allowing them greater freedom, flexibility and spontaneity when travelling. In terms of effects on the industry, digital nomads act almost like leisure travellers, taking advantage of similar services and introducing new requirements related to workspaces, as an alternative to the office. The emergence of digital nomads who opt for short-term rentals of hotel rooms or houses over traditional office space is becoming the new common practice. The US Census Bureau recently released data showing that between 2019 and 2021, the percentage of people working

[12] Destination Gen Z Report, 2019.

remotely tripled from 5.7% to 17.9%. Similarly, data from the UK indicates that the remote workforce experienced rapid growth during the same period. Furthermore, according to the data from Airbnb, long-term stays (28 days or more) spiked by nearly 25% in the second quarter of 2020 when compared to 2021 and increased by almost 90% when compared to 2019. These nomads, who are frequent travellers, are also referred to as location-independent workers and tend to prefer the freedom that comes from working remotely, as well as the flexibility of renting accommodation on a daily basis. Traditional office space, which typically requires long-term commitments and higher overhead costs, may cease to be the preferred option for those who choose to have a remote working lifestyle. These spaces will likely be substituted by those kinds of accommodation and services proper of the tourism sector. This, in turn, will have to adapt to the demand for short-term, temporary rental arrangements furnished with areas dedicated to work.

As a partial solution to the emergence of these new concepts, new trends such as coliving-working models are taking place in many touristic destinations, with the aim of attracting digital nomads willing to live and work in a rich and collaborative social environment, in close contact with their peers. Coliving-working spaces are solutions where individuals can live, work and collaborate within a single, shared environment. This type of model has implications for both individuals looking for a communal living experience and workplaces looking to promote innovation and collaboration within a tight-knit atmosphere. By providing an interconnected living and working space, this model can foster more meaningful relationships among its inhabitants and productive working conditions, thus helping to bridge the gap between professional and personal/social lives. Co-working spaces in the form of cafes and bars are also rising in number, as a response to this new trend.

In terms of legislation, already many are the countries[13] that provide the so-called Digital Nomad Visa for freelancers, remote workers and online businesses. This visa enables qualified individuals to gain access to certain countries in order to work

[13] In 2022, 42 countries provide a Digital Nomad Visa, including major touristic destinations such as Indonesia, Bahamas, Taiwan, Spain, Portugal, Germany, Croatia, Norway, Mexico, Malta, Hungary and Greece.

remotely and more easily relocate around the world. Overall, it implies the potential for greater global mobility for individuals who wish to travel the world, implying a significant relocation in expenditures.

In conclusion, the travel sector will increasingly face the arrival of new permanent travellers, who will add to the traditional holidaymakers. On one hand, these new groups of travellers will be able to utilise the services available to temporary leisure travellers. These may include places such as hotels and other accommodation options specifically tailored to their needs like self-catering apartments or homestays. On the other hand, new needs will arise, such as those to facilitate the integration into the everyday life of the host country and the availability of spaces to socialise and carry on their professional tasks.

2.4 Summary

Gen Z is a unique and diverse generation. This generation is characterised by their digital orientation, proactive spirit and desire for unique and genuine experiences to serve their personal growth and life enrichment. Their behaviours and attitudes towards travel are shaped by common characteristics and traits, resulting in a preference for alternative forms of accommodation, purpose-driven travels and exploration of new cultures and destinations. Travel has definitely become an integral part of life and it is no more seen as a temporary getaway. The immersion in the destination visited fosters a deep understanding of the people and the place, leading to a more conscious approach to travel. The way Gen Zers approach travel is significantly diverse and various from that of the previous generations, and this cohort of travellers is shaping innovative trends across the market, raising the need of addressing new necessities and desires.

Understanding Gen Z travellers is essential for both the travel industry and for marketers who are looking to effectively target this cohort, in order to serve and even anticipate needs that will result from new lifestyles and mentalities.

Chapter III

THE TRAVEL INDUSTRY IS ON THE MOVE

3.1 Introduction

The travel industry has evolved significantly over the past few decades, driven by advances in technology and shifts in consumer attitudes and preferences. Understanding the current state and the changes that have taken place in the travel sector is essential to gain the context of action and understand to what extent those major shifts are in line with new travellers' needs and how they reflect in customers' behaviours.

An overview of historical events and recent innovations is necessary to investigate the overall sentiment from the industry's perspective. As far as those factors may affect both the demand and the offer differently, demand and offer have an interrelated relationship and continually change in response to one another. Furthermore, by examining the current state of the travel industry, it is possible to identify opportunities and determine the best approach to ensure its future success and competitiveness.
As technology continues to advance and consumer preferences grow more diverse, the travel industry has responded by shifting its focus to meeting the needs of Generation Z, the newest wave of travellers.

This chapter will explore the state of the travel industry today, assessing the changes it has gone through in recent years, in particular regarding the effort to cater to Generation Z travellers. Data from the market will be presented to provide an overview of the current trends in the travel industry and the impact that Gen Zers are having on it as trendsetters.
The main approaches the industry has adopted to attract this new generation cohort, from expanding the use of digital tools to offering new kinds of experiences tailored to their interests, will be explored.

3.2 Facts and data

The Travel & Tourism sector's contribution to global GDP experienced a turbulent 2020 with a loss of almost US$4.9 trillion, representing a 50.4% decline compared to the same period of the previous year. In 2021, this trend was reversed with a US$1 trillion increase (+21.7%) which has improved the sector's share of GDP to 6.1%, compared to 10.3% in 2019. 62 million jobs were lost in 2020 due to the ongoing restrictions to mobility, representing a drop of 18.6%. There was, however, some recovery in 2021, with 18.2 million jobs added, representing an increase of 6.7% year-on-year (WTTC, 2022). This data shows that the sector has experienced significant economic losses due to the pandemic in 2020 but has since recovered quite fastly, suggesting that travelling is perceived as an important part of people’s lives.

As reported by WTTC (2022), in the case of international visitor spending, a decrease of 69.7% was observed in 2020, while a rise of 3.8% was observed in 2021. Data on arrivals and departures by UNWTO World Tourism Barometer and Statistical Annex (2022) show that 2021 saw a slight rise of 4% in global tourism when compared to the previous year, totalling 15 million more international tourist arrivals (overnight visitors). Despite this growth, tourism figures remain approximately 72% lower than they were in 2019 before the pandemic began.

The rise in vaccination rates and reduced travel restrictions due to improved cross-border coordination and adherence to new protocols among nations have stimulated the previously restrained demand. When compared to 2020, Europe and the Americas saw a 19% and 17% increase in visits, respectively, recording the most substantial results by region, though remaining below 2019 levels. Tourism in Africa increased by 12% in 2021 compared to 2020, but levels remain much lower than they were in 2019. In the Middle East, tourism declined 24% in 2021 compared to 2020 and 79% compared to 2019. In Asia and the Pacific, tourism dropped 65% from 2020 levels and 94% compared to before the pandemic began.

The revenue generated by tourism in 2021 is reported to be US$1.9 trillion, which is greater than the amount in 2020, stuck at US$1.6 trillion, but still less than the amount generated in the years before the pandemic (US$3.5 trillion in 2019).

As far as 2022 is concerned, the recovery was stronger than predicted. According to new data from the UNWTO (2023), more than 900 million international tourists travelled in 2022, a figure that is double the amount recorded in 2021, albeit at a rate that is still 63% of pre-pandemic levels. Every global region witnessed noteworthy growth in international tourist numbers. Notably, the Middle East experienced the most prominent relative increase, with the number of arrivals soaring to 83% of pre-pandemic figures (-17% compared to 2019). As for Europe, it achieved almost 80% of pre-pandemic figures, with 585 million arrivals recorded in 2022 (-21% over 2019). Europe was responsible for 64% of global arrivals in 2022. The great intra-regional demand was supported by the robust implementation of coordinated travel measures. Meanwhile, Africa and the Americas recorded nearly 65% of their pre-pandemic visitor levels. In contrast, Asia and the Pacific only managed to reach 23%, due to the more rigorous pandemic-related restrictions which have only recently begun to be loosened. The Asia Pacific region accounted only for 9% of the world's international tourists in 2022. (UNWTO, 2023)

The UNWTO/IATA Destination Tracker (updated January 2023) shows that the Asia Pacific region and Africa retain today the higher level of restrictions related to COVID-19, while Europe is the region with the fewest restrictions in place, and with the highest number of countries free of restrictions.

While international travel is beginning to see a resurgence, indicating a positive trend of tourism renewal and rebound, the UNWTO also considers that domestic tourism is expected to remain a powerful driving force of the tourism sector's recovery in a growing number of destinations. This is due to the increase in demand for shorter trips and rural experiences, as tourists seek out destinations near home, with low population densities, that offer open-air activities and nature-based products. As reported also by WTTC (2022), domestic visitor spending saw a decrease of 47.4% in 2020, and a subsequent increase of 31.4% in 2021, globally.

According to the United Nations World Tourism Organization's forward-looking scenarios for 2023, the number of international tourist arrivals this year could reach between 80% to 95% of the levels before the pandemic, contingent on the extent of world economic declines such as global recession, the reclamation of travel activity in Asia and the Pacific and the development of the Russian attack in Ukraine, amongst other variables.

On the whole, tourism remains a major contributor to economies worldwide despite the short-term disruptions caused by COVID-19. This can be attributed to its capacity for job creation and income generation, making tourism a key industry for global development.

3.2.1 Where do people travel?

The top ten international tourism destinations in 2019, according to the UNWTO World Tourism Barometer and Statistical Annex (2020), were France, Spain, the United States, China, Italy, Turkey, Mexico, Thailand, Germany and the United Kingdom.

According to a study on Generation Z travellers by the European Travel Commission (2020), when it comes to European destinations, France, Italy and Spain are the top three countries visited by German, English and American young travellers. Croatia, Austria and Greece, are also popular destinations. Furthermore, the study shows that for those over 18, countries such as Croatia, Hungary and the Czech Republic are becoming increasingly favoured, at the expense of overcrowded destinations such as Amsterdam and Venice. Europe generally retains a higher level of popularity thanks to the possibility of visiting multiple countries and getting in touch with multiple cultures within a lower distance.

Platforms such as American Express 2023 Trending Destinations, Conde Nast Traveler, Fodor’s, Forbes, Lonely Planet and Travel + Leisure, name France, the UK, New Mexico, Portugal and Germany as the best destinations to visit in 2023.

A report by AirportParkingReservations.com (2022) examined a range of factors related to Generation Z, including safety ratings, Instagram hashtags, TikTok view counts, hostel costs and attractions, providing a list of top destinations for young travellers in 2023. The list includes London, Barcelona, Dubai, Paris, Amsterdam, Prague, Berlin, Rome, Milan and Bangkok.

East Asian countries, such as Thailand, the Philippines and Indonesia, are also becoming popular destinations, thanks to the increased accessibility at a lower price and improved level of safety compared to the past. Young digital nomads take those destinations into consideration due to the low costs of living, allowing them to afford higher standards and as a consequence, those destinations are developing tailored strategies and services to cater for these groups of travellers.

3.3 The travel industry has undergone changes

Important changes experienced by our societies over the last decades have impacted the way people travel on a global scale. The industry has seen the emergence of new tools, needs and market demands as a consequence of technology development and the occurrence of events that fostered specific concerns and priorities in the traveller's journey.

In particular, technological advances, from online and mobile booking apps to virtual reality technology, have promoted a significant transformation in the sector. To investigate how we got there and why, it is important to consider the factors driving the demand and the subsequent challenges presented to the industry, as well as the strategies companies are using to deliver new experiences, their impact on customer satisfaction and how big data and new technologies are being used to improve the offer and to anticipate trends.

3.3.1 What's new in technology

Many travel companies have adopted new and innovative technologies to better connect with customers and streamline processes. Technologies such as artificial intelligence, natural language processing, automation and data analytics enable companies to provide customers with personalised services, predictive analytics, better customer segmentation and targeted marketing and improved booking experiences. Companies that are able to provide customised and personalised experiences to their customers making use of the tools available, find themselves at a competitive advantage. By leveraging the latest technologies and gathering data to inform the delivery of customer experiences, they built trust, loyalty and satisfaction with their customers, simplifying processes and reducing costs.

Moreover, thanks to online platforms providing users with a range of providers to choose from and reliable rating systems, competition and global reach have largely increased. These developments have helped to create a dynamic and vibrant industry, more accessible and attractive to consumers.

a. Access to information

The way travellers experience their destination has changed thanks to online tools and applications providing assistance with culture and language, trip planning and activities and even delivering local tips and recommendations. Access to information about travel and destinations has become extremely easy and fast, with online platforms providing reliable reviews and peer recommendations. Travellers can access a wealth of information online, from city guides to detailed tips, making it easier to navigate a destination before and during their visit.

In addition, technologies such as Virtual Reality (VR) and Augmented Reality (AR) have enabled customers to make more informed decisions about their travel plans and itineraries by virtually exploring the destinations ahead. It is important to recognise that such technologies will dominate our lives in the next future and thus considering their usage and implementation will be essential to companies success. Today, the customer response to the use of VR and AR technology in the travel industry has been overwhelmingly positive. During the pandemic, virtual travel has been used as a substitute for reality, due to the impossibility of movement. On the other hand, these new realities have enormous potential for the future of travelling. The benefits that the travel industry has seen since implementation include improved customer engagement and satisfaction, as well as increased customer loyalty and influence on other customers. Other potential applications of AR and VR also include virtual travel and immersive experiences such as virtual hotel tours, navigation and guided tours, test drive excursions, improved museum experiences and interactive gamification.

Ultimately, the rise of social media has allowed travellers to interact with each other and share their experiences, thereby creating a space in which information sharing is extremely easy and happens in real-time, fostering inspiration to travel and often unrealistic expectations. Furthermore, examining social media platforms such as

Facebook, Instagram, and Twitter is useful to get an idea of how travellers are interacting with the industry and where the industry is headed. Conversations have shifted over time to include more personal experiences, reviews and information about destinations, providing new insights companies can take advantage of, such as emerging trends, customer preferences, and popular destinations. In this sense, analysing the data collected from social media platforms can uncover opportunities for marketing, customer service, and product development.

b. Digital interaction

Reliance on physical travel agents has now become obsolete, and the interaction between consumers and travel companies has changed consequently. Travellers have more control over their booking process, with the ability to customise the experience and make changes on the go. With the advent of mobile applications, travellers can now book flights, hotels and more right from their devices and interact directly with online travel agents to explore and compare different options and make payments.

Interaction with travel companies has also become more direct and faster, such as through online chat services or direct messaging features for quick customer support, before, during and after the service has been bought.

c. Time management

The use of the internet in general has made everything achievable in shorter periods of time. Many of the processes involved in travelling have been facilitated, from access to information to booking and purchasing online. Companies have improved their websites, mobile applications and customer services to provide customers with an easy and seamless booking process and a hassle-free experience.

More recently, one remarkable innovation of technology that is being implemented over time is the use of biometric scanners at borders crossing. These technologies allow for more efficient processing of travellers without having lengthy conversations with police officers and customs officials at checkpoints. This has led to a smoother process, as individuals simply have their unique identity scanned in order to verify them as legitimate travellers or citizens entering certain areas within international borders. Additionally, some countries have also implemented online application forms where those travelling across can fill out 'monitored visa waivers', thus proving registration prior to arriving with an intention in mind when reaching geographical frontiers.

Moreover, from the customer care perspective, Artificial Intelligence (AI) is being implemented in the form of a chatbot, able to instantly respond to customers' requests and sometimes support them without the employment of a real person. This innovation has led to an increase in customer satisfaction, as well as in the reduction of time necessary for providing support.

d. Costs

In the current economic climate, travellers are becoming increasingly cost-conscious, seeking to maximise returns by minimising their expenses. This has led to a shift in focus, as customers become more concerned with finding the best value for their money, prioritising convenience and quality. This is particularly true among Generation Z members: they are increasingly likely to spend more time comparing prices between different suppliers to secure the most advantageous deal. In terms of costs, the travel industry has seen a surge in competition over the past few years, which has led to an overall decrease in prices. For example, many airlines have adopted more competitive pricing models, allowing travellers to enjoy lower fares. Additionally, standards have been set in place to help ensure that travellers are getting fair prices.

Other ways in which travel has become more affordable include the increased availability of budget-friendly options in accommodation, such as hostels, budget hotels and other affordable services. Budget travel has become increasingly popular among young travellers and often involves choosing off-season and unpopular destinations. Common preferred destinations include places like Southeast Asia, Central America and Eastern Europe. By travelling during the off-season, savings on transportation and accommodation costs are guaranteed as prices lower down with the decrease in demand.

e. Accommodation

The introduction of home-sharing services such as Airbnb had a significant impact by providing alternative accommodation options, often cheaper and away from the main touristic hubs. On the other hand, the emergence of new tourism hubs presented businesses with new opportunities for development and gentrification[14]. In this sense, Gen Zers not only set trends in the way they travel, but they also create new travelling destinations, previously unexplored by the travel industry. Increased numbers of alternative types of accommodation such as hostels, homestays or couchsurfing and so on, have gradually replaced more traditional facilities, opening the way to new trends young people drive.

f. Transportation

The availability of travel has increased significantly as a result of technological advances and new transportation options. The growth of air travel, budget airlines, and improvements in global infrastructure have led to a greater variety of destinations available for travellers, with many more exotic and remote locations becoming accessible, often for less money than before.

[14] A further discussion on whether this kind of gentrification can be considered or not 'good practice' would be needed.

Also, access to other kinds of transportation has changed, with the emergence of sharing economy companies such as Uber and Lyft or Blablacar and special offers made ad hoc for young travellers like the Interrail pass[15].
In addition, several other advancements have changed the way we travel, from GPS navigation systems to alternative forms of transport like hybrid cars and electric scooters, pointing out the sustainability concern.

3.3.2 Changes in the world's dynamics

On the other hand, the changing political landscape has profoundly affected the travel industry more in a negative than in a positive manner. Political uncertainty, terrorist threats and rising geopolitical tensions have resulted in the impossibility of travelling to certain destinations and fear to move in general. Safety has gained importance in people's awareness and in some cases stopped them from travelling, at least internationally.

In the wake of the COVID-19 pandemic as well, people of all ages have become more cautious when it comes to travel and they are seeking out destinations and activities that provide reliable health measures. Evidence of that is what is displayed on Booking.com[16], which allows the users to select properties under the category "*Properties that take health & safety measures*".

The regulations governing the travel industry have also evolved, with an increasing emphasis being placed on environmental regulation and consumer protection.

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[15] Interrail passes are all-in-one rail tickets that enable travellers to take the train across multiple countries throughout Europe. Depending on the type of Interrail pass purchased, travellers can board unlimitedly, or up to a certain number of trains in the participating countries, usually over a period of 1 month. Interrail passes offer discounted fares for long-distance and international train travel, and some countries also offer discounted ferry rides.

[16] Here and after, the reference to the online platform of Booking.com and Airbnb are cited, as sole examples, due to the fact that these are the most used by most travellers around the world, and for this reason are considered here of relevant value.

To minimise the environmental impact of the travel industry, operators and businesses are taking steps to reduce their carbon footprint and limit their use of resources. As environmental awareness has grown, so too have consumer attitudes towards the environment, with travellers increasingly seeking out eco-friendly options when planning their trips. Many travel companies have implemented sustainable initiatives such as cutting down on single-use items, installing energy-efficient infrastructure and providing discounts for customers who use green transportation. Economic incentives and policies from governments such as subsidies, taxes reductions for companies and discounts for customers, fostered the investment and use of green infrastructure.

In particular, the European Green Deal is being followed by the new EU Corporate Sustainability Reporting Directive (CSRD)[17] which was applicable since 2022 for EU companies and from 2024 for non-European companies with substantial activity in the EU market. The CSRD requires companies to disclose accurate and detailed information about the potential risks and benefits of their activities, as well as the impacts their activities have on the environment and people. The reporting is also required to be cost-efficient and consistent, reliable and easy to access digitally by users. The aim of this initiative is to support the goals of a climate-neutral EU by 2050 through incentivising awareness and investments from public and private sources.

Moreover, the UNGA adopted a new Resolution in December 2022, in support of the *2030 Agenda for Sustainable Development*, on the promotion of sustainable and resilient tourism, enabling poverty eradication and environmental protection, specifically focusing on ecotourism. This approach seeks to strengthen public awareness of tourism's important role in a country's sustainable development by implementing sustainable practices that reduce greenhouse gas emissions, ensure

[17] The major improvement presented by the Directive is the extension to a larger number of companies, small and big, of the requirement to draft a sustainability report, in line with mandatory EU sustainability reporting standards and alongside an external verification from an independent third party on the accuracy and reliability of the report. The new standards were set by the European Financial Reporting Advisory Group (EFRAG) in 2022 with the composition of the EFRAG Sustainability Reporting Board (SRB) and the EFRAG Sustainability Reporting Technical Expert Group (SR TEG). The standards will be reviewed every three years and require the reports to be understandable, relevant, verifiable, comparable and represented in a faithful manner, while also avoiding unnecessary administrative burdens on companies (Wollmert and Hobbs, 2022).
The Directive is a revision and thus an amendment of four other directives: the Accounting Directive, the Transparency Directive, the Audit Directive, the Audit Regulation.

sustainable consumption and production patterns, manage natural resources responsibly and conserve biodiversity. It promotes sustainable and resilient tourism as essential for poverty reduction and environmental protection to reduce poverty, create jobs and foster better connections between local communities, tourists and the environment. It also encourages a systemic approach with collaboration between different actors in the tourism value chain, from service providers to adjacent communities to tourists, to ensure the sector's sustainability. Finally, it highlights that rebuilding tourism after the disruption caused by COVID-19 is an opportunity for transformation.

Changes to ensure consumer protection in the travel industry include the introduction of better customer service, improved transparency and clarity in contractual agreements, and the adoption of ethical standards. Contractual agreements between travel companies and consumers have become more transparent, with companies providing more detailed information about their policies and increased transparency regarding hidden fees and surcharges, so that consumers know exactly what they're paying for. Companies have also implemented refunds and flexible policies for changes to itineraries due to unforeseen or emergency circumstances. Additionally, ethical standards have been adopted in order to protect consumers from unfair practices, such as deceptive advertising, overbooking, unnecessary upselling[18] or price gouging[19]. To ensure accountability, companies have implemented measures to monitor and address consumer complaints, as well as provide refunds for unsatisfactory services. Technological advancements have also played a role in facilitating better customer service, reliability and access to information, with companies utilising digital tools to provide more information and get in direct contact with customers for pre-trip, in-trip and post-trip assistance.

[18] It refers to the practice of encouraging customers to purchase additional services or products that are not necessary for their trip.
[19] It refers to the practice of charging significantly higher prices than usual for goods and services during a time of crisis.

At the European level, since May 2022 new measures[20] have been introduced in order to rectify the perceived deficiencies in statutory consumer protection, including those laws relating to package travel, unfair contract terms and deceptive practices. As a consequence, regulators are provided with greater authority to tackle companies in the travel sector that do not adhere to regulations. Particular emphasis is put on clarity and transparency on search results, personalised deals, pre-payment protection and request and use of consumers' data. Travel companies must also actively adhere to new laws prohibiting the utilisation of deceptive consumer reviews and coercive tactics (e.g. countdown timers or 'drip pricing'[21]) to push consumers to purchase. In order to foster customers' awareness and actual implementation of their rights, the Directives also simplify the processes of launching class action lawsuits against companies. Ultimately, the New Deal for Consumers, in force in the UK and the EU, imposes GDPR-level fines of up to 4% of annual turnover for travel companies that don't comply with the law. Several non-EU countries, including Bulgaria, Croatia, Serbia and Turkey, have been inspired by the Directives and have enacted national legislation to accommodate this.

In the same regard, the European Union published in 2018[22] a study to investigate how online platforms could be regulated to foster trust, clarity and fairness. Three key areas were investigated: the criteria for ranking and presentational features of search results; the identity of contractual parties; the quality controls on consumer reviews, ratings, and endorsement systems. The results showed that greater online transparency has three important effects on consumers: it is essential for making informed choices; it strengthens trust and confidence in the digital environment; and, all other elements being equal, it raises the chances of a product being purchased.

[20] Available for consultation at:
https://ec.europa.eu/commission/presscorner/detail/es/MEMO_18_2821

[21] Drip pricing is a sales tactic where additional fees and charges are gradually revealed to a customer at various stages of the purchasing process. These charges are then added to the advertised price of a product or service, meaning the customer actually pays more than what initially advertised.

[22] Available for consultation at:
https://commission.europa.eu/publications/behavioural-study-transparency-online-platforms-2018_en

The European Commission also issued a proposal[23] for regulations through a call for evidence and feedback on the protection of passengers and their rights in the transportation sector, which ended up in a public consultation between September and December 2022. The consultation will be followed by the adoption, coming in the second quarter of 2023. The aim of the initiative was to examine the regulations about passenger rights enforcement and the resilience to extensive travel disruptions, firstly moved by the consequences brought about by the COVID-19 pandemic outbreak. It considers options for the financial protection of customers against insolvencies, such as reimbursement and repatriation, and initiatives to raise customer awareness about their rights. As well, the accompanying paper to BEUC's response to the European Commission's Initiative presents a list of recommendations on how to improve traveller protection further addressing the need for harmonisation of passenger rights.

Similar actions have been taken by the U.S. Transportation Department, while America as a country has more than seven federal statutes regarding customer protection.

In Australia, a clear and punctual guide on travel and accommodation was published in 2013, as complementary to the Australian Consumer Law, in regard to online bookings, holiday deals, representation vs expectation, price transparency, cancellation policies, etc.

[23] Available for consultation at: https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/13290-Travel-better-protection-for-passengers-and-their-rights_en

3.4 New customers, new needs

The shift in how travellers approach travel from the first phase of the journey to the last is related to and dependent on the change in preferences and behaviours, in turn influenced by external factors.

In the past five years, customer needs have changed significantly in terms of customisation and personalisation, as they are now seeking experiences that are more comprehensive, interactive and engaging. A factor influencing this demand includes the need for more efficient interactions with companies, as the expectation of individualised attention and services requires companies to fully engage in understanding their customers.
The industry is responding to this trend by utilising a variety of strategies, such as offering tailored product recommendations, providing customised promotions, creating interactive experiences and incorporating artificial intelligence into customer service activities. As a consequence, the increase in demand for customised and personalised experiences resulted in a positive impact on customer satisfaction, as customers feel more connected and understood. Essential in this scenario is the use of big data to collect and analyse insights, through predictive analytics that anticipate customer needs and machine learning that develops more accurate solutions. As customers become, willing or not, more comfortable with the idea of sharing their data, companies are getting able to anticipate changes in order to stay ahead of the competition.

From the user's viewpoint, the implementation of new technologies has made a significant impact by providing travellers with more options and easier access to information, which translated into more convenience and control over the process. Technology has enabled online booking systems, mobile applications and online payments. Travelling in its entirety has become easier and faster. The travel customer journey from the pre-trip to the post-trip phases is now performed by and thanks to tech tools and online applications.

3.4.1 The traveller's journey in the digital era

a. Awareness

Awareness, the very first step of the journey, often takes shape as a consequence of influences from content on social media platforms, from both peer travellers and disguised marketing ads. Generally speaking, awareness is a fundamental step toward any kind of purchase, as the customer is first exposed to a product or service through various channels. New technologies are fundamental and powerful tools for marketing strategies. This process typically begins with the customer's first interaction with a brand via any form of digital engagement. During this phase, the customer is learning about the brand and its products or services, starting to form opinions, and possibly beginning to create the desire to purchase. Therefore, advances in digital marketing have enabled the industry to reach new audiences and create targeted content for travellers thanks to the collection of personal data. Indeed, marketing strategies often employ psychological tactics to create purchasing desires in potential consumers, even when they do not necessarily need the product being advertised. Marketers in the travel sector will frequently capitalise on the concept of 'FOMO'[24], which is highly spread among Gen Zers, by creating a sense of urgency and exclusivity associated with their service. Time-sensitive deals or the so-called 'lifestyle marketing' and other such strategies can create an impetus to buy, regardless of a consumer's actual need for the product. Social media influencers, as well as contents posted by peer travellers, represent clear examples of how social media platforms are more effective and sutble than traditional marketing campaigns. By offering a place for users to share their ideas and experiences, social networks can inspire, often unintentionally, those who view the content and generate an unconscious desire for travel.

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[24] FOMO (Fear of Missing Out) is a feeling of anxiety or disappointment that an individual experiences when they consider the possibility of missing an opportunity, social event, or another exciting experience. It is characterised by a desire to stay constantly connected with what others are doing and a fear of being left out. Oxford Languages defines FOMO as follows: "Anxiety that an exciting or interesting event may currently be happening elsewhere, often aroused by posts seen on social media."

b. Consideration and planning

In the consideration phase, customers are able to utilise a range of technology, including search engines, comparison websites and applications, as well as social media profiles and pages, to gather information and narrow down their lists of possible destinations. This includes exploring online content such as videos and blogs, reading reviews and gathering information about attractions, hotels, airports and other travel-related services. Results are fast and often accurate, allowing the user to consider a variety of plans by taking into account the specific variables involved, such as price and time. The traveller can pretty much formulate a clear idea of what the trip will look like before committing to any payment and easily choose among the options without leakages. It is here that the presentation quality of the service shown makes the difference in the decision-making process of the user, who more than in the past value simplicity and aesthetic in terms of user experience.

c. Booking or purchasing

After having a first draft of the itinerary, which can be easily organised and stored in ad hoc mobile applications, the customer purchases their desired services and commits to the journey. This includes purchasing transportation tickets, accommodation and additional services such as activities, guided tours and insurance, etc. Online payments provide convenience and reliance, allowing travellers to book and pay for their trips without space and time constraints. Digital wallet services are becoming increasingly popular in the travel industry as they offer a secure, easy and convenient way to pay for travel-related expenses. Benefits include secure transactions, instant payments, and the ability to use rewards points and frequent flyer programs to gain loyalty concessions.

In addition, travel companies[25] have been increasingly adopting flexible payment options such as layaway plans, deferred payments, instalment plans and 'Buy Now, Pay Later' options[26]. Customers have responded positively to these flexible alternatives, leading to increased sales and financial stability for travel companies. The choice of one payment option over another depends on travellers' individual needs, and differences exist between the flexible payment options adopted by large and small travel companies. But, overall, customers take advantage of these payment options quite often, and satisfaction is generally higher when multiple payment options are available.

To help the users organise their itineraries and share those in selected communities, many companies have developed ad hoc mobile applications that allow travellers to store and organize their travel information like flight tickets, hotels, rental cars, events and reservations, all in one place. This allows combining all of the bookings into one comprehensive itinerary. The apps automatically gather and store all necessary information for easy and quick access at any time. Once the user has created an account they can use the app to view their travel plans, maps and directions, check flight status, and access real-time updates[27].

d. Preparation

The pre-trip preparation is also facilitated by easy access to information about countries' entry requirements, visa applications, and mobile apps that help users

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[25] Examples of travel companies adopting flexible payment options are:

- CheapOair, offering a layaway plan that allows travellers to pay for flights in three instalments;
- Expedia, which offers a deferred payment option for flights, hotels, and car rentals;
- Travelocity, that offers an instalment plan for flights allowing travellers to pay for their tickets in three payments.

[26] Buy Now, Pay Later (BNPL) is a type of payment plan that allows customers to purchase goods or services and delay payment until a later date. This type of payment plan is common in retail stores, online shopping, and other services. It can offer customers flexibility in their payment schedule and help them manage their finances. Buy Now, Pay Later plans typically require customers to make a minimum payment each month and may incur additional charges or interest payments if the balance is not paid off in full.

[27] Tripit is the most popular of many other applications that offer similar services, such as Google Trips, TripCase, WorldMate, Kayak Trips, TripGo, Trip Hopper, TripLogik, etc.

preparing their belongings. Official government websites and tourist information pages are updated regularly to ensure they are providing accurate and up-to-date entry requirements. The clarity of the information exposed is up to the single country, but overall it has become much easier to find information from official sources.
Mobile apps use criteria such as destination, duration of stay and type of activity to help users prepare their luggage. Reduction of time spent on preparation, less risk of error and no need to rely on intermediaries are some of the most relevant advantages of having access to all the information available online.

e. Experiencing

The experiencing part is the actual travelling portion of the journey. Travellers keep connected even more during the trip as new information pop up or alternative plans arise. The use of the Internet during trips to gain valuable information such as guides and recommendations and in-trip assistance has replaced the direct exchange of information between people.
Travellers also feel the need to communicate with others about their trip. Through their devices, they are able to document their experiences and share photos and videos within their digital community of like-minded individuals, strengthening their sense of belonging and solidarity. Seeking external validation, this form of documentation has become a way to reinforce and validate the travelling experience, as individuals get responses from their peers and receive feedback based on the activities shared. Validation is perceived as a form of positive reinforcement, allowing people to feel accepted and validated by a social group. Still, once again, it is comprised of those psychological phenomena that are intensely employed by social media to influence users’ behaviours.

f. Return and sharing

As the sharing continues when the travel comes to end, a variety of reviews, feedback and visual documentation is available online and keeps being produced after the travellers' return. This last phase closes a cycle that is ready to begin again in a new individual, as people stay connected and influence each other.

3.5 Generational Influence on Travel & Tourism

Generational cohorts are characterised, with more or less intensity, by different consumer behaviours. As sociology exploits generations division to investigate how different historical events shape people's lives and their attitudes in a particular way, industries too need to take into consideration the study of how their customers differ from each other in time. From this perspective, each generation has its own set of values and preferences related to products and services. Generational differences have a significant influence on the travel experience in terms of frequency of travel, motivations, type of destination and activities, amount of money spent and attitude towards the overall experience.

For example, when travelling abroad, communication and interactions can vary significantly between generations due to differences in language, cultural norms, education level and technology use. Baby boomers or Generation X members perceive language barriers and cultural differences with more intensity than younger generations. As education became more accessible over time, those with higher levels of education are more likely to have an understanding of different cultures and be better equipped to communicate effectively. Language proficiency is also an important factor, as those with greater fluency can more easily adjust to different cultural norms when travelling abroad. Due to different cultural backgrounds and technology usage, different demographic groups approach the experience of travelling with diverse goals, expectations and attitudes. Younger generations tend to be more tech-savvy and familiar with the latest communication technology tools and online platforms, while older generations may not be as comfortable using them, still relying on physical travel agencies.

Being aware of such differences, the travel industry should develop different strategies and innovations in order to engage the newest traveller groups. As Gen Zers are more interested in experiential travel, cultural immersion and unique experiences, the industry must focus on providing opportunities for these values to be experienced.

3.5.1 Generation Z differs from other generations

As we have seen in the previous chapter, Gen Z travellers differ from other generations in their needs, preferences and priorities. As a generation that is highly connected to technology and social media, they perfectly embrace new advances in technology fostering the creation of unique needs and interests.

Gen Z travellers typically prefer to have a unique and immersive experience, which often includes activities such as adventure, sports, cultural immersion and educational experiences. They also like to explore destinations off-the-beaten-path, and they prefer to create their own itineraries rather than book a pre-planned package. Gen Z also tends to prefer more informal and low-key types of trips, such as road trips and local getaways. They are more likely to look for such activities as yoga retreats, cooking classes and food-focused experiences. It is much less plausible for them to prioritise the traditional tourism approach, being instead more engaged in what they perceive to be authentic and in contact with local cultures. They also have precise motivations to travel, such as understanding cultures, self-development and exploration and self-growth.

Gen Z travellers use technology more than other generations when booking their trips. They often use mobile apps, social media and search engines in their planning and booking process as well as to gain updated information and move around during the trip.

When it comes to where to stay, while some Gen Z travellers prefer accommodations with a home-like atmosphere, such as Airbnb[28], boutique hotels and glamping[29], others opt for budget options such as hostels and homestays, also pursuing genuine social connections with other fellow travellers. They prioritise comfort as well as convenience and affordability.

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[28] Airbnb has developed a sorting system that allows users to select the categories to fit their preferences when choosing an accommodation. The categories include a variety of particular and unique accommodations: *Castles, Tiny homes, Treehouses, OMG!, Cabins, Creative spaces, A-frames, Farms, Domes, Caves, Ski-in/out, Earth homes, Houseboats, Off-the-grid, Arctic, Cycladic homes, Vineyards, National parks, Containers, Windmills, Shepherd's huts, Riads, Barns, Trulli, Hanoks, Ryokans, Historical homes, Yurts, Dammusi, Minsus, Campers,* etc.

[29] Glamping is defined as a style of outdoor accommodation which combines elements of traditional camping with more glamorous and luxurious amenities. This luxury camping style utilises modern amenities such as beds, linens, heaters or air-conditioning, lighting, and other comforts that most closely resemble home living, while still enjoying nature in a secluded and scenic area. Glamping typically provides a unique lodging experience that blurs the lines between roughing it in nature and living in a hotel.

Flights are generally viewed as simply a way to travel from point A to point B, and having experienced minimal changes in product and service recently, they are merely seen as a means of transport. Conversely, the accommodation sector has experienced noteworthy advancements in design and facilities, effectively making accommodation a more essential part of the overall travel experience and thus potentially warranting extra expenditure. In other words, Gen Z prefers to save on flights and transportation, while the quality of the accommodation is perceived to be an opportunity for self-reward (ETC, 2020).

Gen Z eagerly embraces new technology, usually being the first to do so as early adopters and switching off old routines. They are fast learners who recognize the benefits of flexible cancellation policies and contactless payment options, and are aware of health and safety protocols, as a consequence of the COVID-19 pandemic.

Sustainability is strongly felt by Gen Z travellers, who prioritise destinations and activities that are eco-friendly and respectful of people and the environment. They are more likely to look for sustainable accommodations and transportation options, such as car sharing or electric scooters, and engage in activities that include the involvement of local communities and may benefit the locals.

Finally, although it would be inaccurate to make a generalisation about Gen Zers being more or less cautious than other generations, we may hypothesise that, as a consequence of historical events such as the recent pandemic and the Ukraine war, Gen Z travellers will tend to be more prepared and aware of risks when travelling, prioritising safety and security over other factors. Every individual has different levels of caution when they travel, and this can depend on many factors such as life experience, financial resources and general outlook, but there is no doubt that recent global developments have deeply affected the youngest in their formative years more than other generations.

3.5.2 Gen Zers are the next trendsetters

The travel industry has become increasingly aware of the presence and importance of Gen Z travellers for the sector. The oldest members of Generation Z are becoming the new trendsetters as their buying power grows over the years. In 2020, Generation Z accounted for 40% of global consumers, with their buying power growing rapidly.

The Bank of America Research has predicted that by 2030, Gen Z will generate $33 trillion in income, representing 27% of the world's total income and surpassing that of Millennials in 2031 (Hoffower and Kiersz, 2021).

Not only, Generation Z has a considerable influence on their families’ travel decisions due to their active participation in the planning process, as well as their knowledge of current trends. As Gen Zers are constantly consuming new information through technology and social media, they can provide travel advice and tips not otherwise accessible to the older generations. According to Jenkins (2018), members of younger generations have become increasingly influential in American consumer culture, extending beyond their own buying power to include the influence they have on their parents' spending. This indicates a much broader reach across generations than has been seen in the past. This also suggests that, when providing a multi-generational trip, companies should be aware of the importance of catering to the needs of the younger generation, who are likely to be the most easily distracted or dissatisfied.

The 2019 Destination Gen Z report from Booking.com has revealed that travel is a preferred spending option among Generation Z, surpassing the assumption that they prioritise purchasing technology and food-and-beverage experiences. According to the same research, 60% of individuals aged 16-24 believe that travel is always a worthwhile investment. Additionally, 69% of the surveyed respondents had already created a travel bucket list, and 32% of them planned to mark off at least five trips from the list in the next decade. Generation Z appears to be composed of avid travellers, with 65% of them prioritising exploring the world over investing in more traditional milestones such as purchasing a house or saving up for a wedding (Booking.com, 2019). Visser (2019) also found that in five out of seven spending categories, travel experiences emerged as the primary preference, especially when compared to material possessions, clothing, electronic devices, dining at restaurants and spa or beauty treatments.

3.5.3 The travel industry is aware of Gen Z travellers

Steps have been taken by companies to ensure that the offer is attractive to Gen Zers by keeping abreast of the latest trends and preferences of this age group while collecting data on their needs and behaviours.

Professionals in the sector perceive Gen Z travellers as adventurous, digital natives and highly cost-conscious, who are looking for meaningful experiences rather than solely economic value. To better target this group of travellers, the travel industry has made efforts to adapt and tailor their marketing, pricing, services and practices to meet the needs and expectations of this demographic. The travel industry has specifically begun responding to their needs through technology-based services. Companies have upgraded their websites and developed applications to create a more attractive offer, starting with their presentation and visual impression. If there is an application that simplifies travel, it's highly probable that Gen Z will constitute a large percentage of its most frequent users.

In response to the expressed wants and needs of the Gen Z demographic, brands and retailers are transitioning from traditional marketing approaches to incorporating more holistic, community-focused strategies. Utilizing social media and other online outlets, companies are attempting to create a more personalized and engaging narrative. Marketing initiatives have focused on providing a more engaging, interactive and personalised customer experience, often incorporating digital and social media platforms such as YouTube and Instagram. Leveraging social media and other digital platforms has become essential for travel companies in order to achieve higher brand loyalty, increased brand recognition and greater trust. Moreover, brands are forming their own communities to honour shared values and unify the target demographic's identities. Practises such as *Influencer marketing*[30] have become increasingly popular

[30] Influencer marketing is a type of marketing in which businesses seek to collaborate with individuals who have a strong online presence, or "influence", to reach their target audience. This type of marketing typically involves collaborating with influencers to promote a brand or product through sponsored posts, reviews or videos. It is a form of digital marketing that focuses on building relationships with influencers to help increase brand awareness, drive traffic to a website, and ultimately increase user engagement and sales.

over the past few years reaching a large audience through a user-friendly and cost-effective way. In particular, the implementation of influencer marketing has significantly impacted businesses' advertising strategies as companies are now able to target and reach specific and wider audiences in an engaging and organic manner. Companies that are most successful in employing this type of marketing are typically those that have a strong focus on storytelling, have a clear understanding of their users and aim at building loyalty by fostering pseudo-human relationships of admiration and closeness between the user and the influencer/brand. Gen Z is significantly impacted by online influencers, although lacking a specialized background in a certain subject matter yet they have managed to build a vast social fanbase and provoke intense interaction[31].

This type of marketing also generates a big number of data, that offers businesses the possibility to easily measure the effectiveness of the marketing campaign by tracking the number of likes, comments and shares, as well as the number of conversions that have been made.

The industry has also been more aware of sustainable practises, adopting eco-friendly measures to appeal to Gen Z travellers who are particularly concerned about their environmental impact. As a shred of evidence, Booking.com offers the option of sorting results under the category "*Travel Sustainable properties*".

Products and services have also been adapted to fit the preferences of Gen Z travellers, including greater emphasis on unique local experiences, activities and events, and personalisation of the customer journey. Booking.com shows the category of "*Fun things to do*" which includes: walking tours, bicycle rental and bike tours, hiking and classes about local culture.

Price, as well, has emerged as an important factor for Gen Z travellers. To respond to that need, the travel industry has introduced new pricing strategies such as *bundled packages*[32] and special discounts to fit the varied budgets and priorities of this

[31] A further discussion on the pros and cons of this interactions would be needed.
[32] Bundled packages are collections of products and services that are grouped together and discounted, or packaged, to be sold as a single unit. The items can be related or unrelated, and the packages often provide a discount to the customer compared to buying the individual items separately.

demographic. Additionally, various new business models, including resale, rental, and subscription services, are being employed in order to provide sustainable and more flexible ownership options. Moreover, companies are inviting Gen Z to participate in the product development process, positioning them as strategic partners and providing them with added value.

Flexibility as well is another important voice travel companies are implementing, in particular regarding payment options and booking reservations. Some companies have changed their booking policies to allow customers to cancel or reschedule their bookings with minimal or no additional charges. On Booking.com, it is possible to have access to cancellation policies that allow the user to cancel the reservation or book without entering credit card details.

Gen Zers seem to love reviews and feedback systems, which give customers an opportunity to provide their own opinion about a product or service in relation to the company, helping other customers to make better-informed purchasing decisions. Young travellers heavily rely on these systems when using any kind of service. Peer feedback is perceived to be more truthful and trustworthy than other types of 'upper-down' recommendations or validations. Those systems also help companies to better understand the needs and preferences of their customers by operating sentiment analysis on written text and ratings, leading to service improvements.

Chapter IV
THE AUSTRALIAN TRAVEL INDUSTRY

4.1 Introduction

The tourism industry in Australia is an essential part of the country's economy. Making a significant contribution to the GDP and providing employment for hundreds of thousands of people, the travel sector is the most significant services export industry in the country. Australia is renowned for its diverse attractions, from world-class cities to iconic natural wonders and innovative theme parks. With people from all over the world travelling to experience Australia's unique culture, natural beauty and breath-taking environments, the Australian tourism industry is a major player in the global market. From world-famous Sydney to the unique Great Barrier Reef, Uluru and the Great Ocean Road, travellers are spoilt for choice when it comes to things to do.

This chapter provides a comprehensive overview of the current state of the tourism industry in Australia, in particular regarding inbound visitors. Considering the data on international arrival pre and post-pandemic, the impact of tourism on the Australian economy is briefly presented in order to provide a thorough understanding of the current state and prospects of the sector.

Ultimately, being the largest percentage of short-term international travellers cohort represented by young generations, it will be argued that the country has the potential to perfectly cater to Gen Z travellers' needs. In accordance with the most common trends among young travellers to Australia, backpacking will be explored considering the great number of travellers looking to explore, adventure and embrace the natural beauty of the country, also leading to an increasing demand for budget-friendly accommodation, transport and activity options.

4.2 Current state of the travel industry

Prior to the invention of the railway, travelling around Australia was a slow and strenuous process and was mainly done by those looking for work, new opportunities or wanting to settle in new areas. Following The Great Depression, international travel to Australia increased, and in 1934, the first cruises between New Zealand and Australia were organised. Then, in the 60s, with the onset of commercial international flights, Australian international tourism began to prosper. Over the last two decades, international tourism in Australia has seen immense growth, doubling the number of visitors.

Today, tourism is one of the country's most important industries, contributing billions of dollars to the economy each year. According to the Australian Bureau of Statistics (2022), the total amount of money that the travel sector has contributed to the economy in terms of gross domestic product (GDP) reached a peak of $61.9 billion in the 2018–19 financial year[33], directly employing more than 700,000 Australians and making up 5.1% of Australia's workforce.

4.2.1 Recovering from the pandemic

The outbreak of the coronavirus pandemic in the middle of 2020 saw international visitors to Australia decline by 73%, as reported by the Australian Government's Department of Foreign Affairs and Trade (2021). Quarantines and other restrictive measures related to the pandemic in the Asia-Pacific region took place for a longer period of time compared to other areas, such as Europe, resulting in a lower number of international arrivals to Australia until more recently. However, with the gradual lifting of border restrictions in 2021, international arrivals began to rise. The number of

[33] The Australian Bureau of Statistics (ABS) defines the financial year as beginning in the month of November.

overseas arrivals in 2022 counted 9,717,770 visitors. The month of November 2022 counted alone 1,189,920 overseas visitor arrivals, of which 505,240 were short-term[34] (ABS, 2023). However, the findings reported by the Australian Bureau of Statistics illustrate that, while there has been an improvement in overall tourism economic activity, the industry remains below the peak of 2018-19. In particular, gross domestic product (GDP) rose by 26.4% to $35.1 billion in chain volume terms[35]. Further, the tourism industry's contribution to the overall economy GDP rose to 1.6% in 2021-22, yet remains below the 2018-19 level of 3.1%. International tourism consumption also rose by $5.6 billion to $6.4 billion in chain volume terms. Lastly, tourism-filled jobs rose to 501,400 in 2021-22, but remained below the 2018-19 peak of 701,100 filled jobs.
Further improvements are expected for 2023, as restrictions and measures are almost absent now and the country has fully reopened its borders[36].

The forecast published by Tourism Research Australia (TRA, 2022c) shows an international visitor expenditure exceeding pre-pandemic levels in 2024, predicting this to increase to $48.8 billion by 2027. It is predicted that the process of recovering international tourism will be gradual, and the rate of recovery is anticipated to fluctuate across varying markets and purposes of travel. By 2025, it is forecasted that visitor arrivals will be higher than pre-pandemic levels, and by 2027 the number is predicted to total 11 million. As for international spending, it is anticipated that it will take less time for it to reach its pre-pandemic levels, and this is anticipated to occur in 2024.

Additionally, the Australian government developed a national strategy for long-term sustainable growth aimed at overcoming the effects of the pandemic on the country's

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[34] Less than 1 year period.

[35] The expression 'chain volume terms' refer to a method of measuring changes in a certain set of economic variables over different periods of time. It involves tracking changes in the volume of a particular group of goods or services, such as including changes in the prices of those goods or services. Chain volume terms are used to measure the monetary conversion of goods and services within the national economy over a specific period of time. These terms refer to the terms used in analyzing a nation's Gross Domestic Product (GDP) and include the current-price or nominal GDP, the volume-price index and the chain-weighted GDP value. Chain volume terms are used to track the production and consumption of goods and services, compare economic performance over time, and guide economic policy decisions. For more see treasury.sa.gov.au.

[36] The international border fully reopened to all vaccinated travellers on the 21st of February 2022.

international tourism. The Australian visitor economy's THRIVE 2030[37] Strategy is an action plan for redevelopment and expansion that has been industry-driven and government-enabled. With the goal of achieving a visitor economy expenditure of $230 billion by 2030, this strategy provides a clear pathway towards the nationwide revitalisation of the sector.

4.2.2 Travellers to Australia

Australia's geographic limitations as an island continent located entirely in the Southern Hemisphere may make it an inconvenient destination for those living in the northern latitudes. This remoteness has likely contributed to Australia not ranking amongst the most visited countries by international travellers in 2019 (UNWTO, 2020). Furthermore, the extended flight time and cost from northern continents may discourage potential visitors from making the journey. Also, the presence of more affordable neighbouring destinations such as Indonesia and Thailand may likewise reduce the number of travellers arriving in Australia.

In 2019, short-term visitor arrivals to Australia were largely comprised of three distinct source countries: China, New Zealand and the United States, followed by the UK, Japan and Singapore (ABS, 2020). In contrast, 2020, while suffering from an overall decrease in overseas arrivals, saw New Zealand, the US and the UK in the top three countries of origin of international visitors. The biggest drop in March 2020 was from China, with a decrease of 78%, closely followed by Japan and Malaysia due to the travel restrictions

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[37] Released on the 25th of March 2022, THRIVE 2030 envisions a visitor economy that is capable of providing visitors with quality experiences and successful, sustainable businesses that can operate with global competitiveness. The strategy puts forth priorities to address the long-term issues as well as the challenges created by COVID-19. These priorities fall within three overarching themes – diversifying markets, experiences, and destinations – such as the respectful inclusion of First Nations peoples and cultures and modernising the visitor industry workforce, infrastructure and business practices. Moreover, effective collaboration between industry and government, underpinned by the use of high-quality data and insights, is necessary to pursue the objectives of THRIVE 2030, which ultimately strive to return the sector to pre-pandemic visitor spending and sustainable growth. The implementation plan is developed in 3 phases.
(https://www.austrade.gov.au/news/publications/thrive-2030-strategy)

in place in the respective countries (ABS, 2023). The number of journeys as of November 2022 was 38.1% lower than the pre-pandemic level in the previous year, the same month. In 2022, following the trend generated by the pandemic, the top five countries of residence of international visitors were again New Zealand, accounting for 16% of visitors, followed by India, the UK, Singapore and the US (ABS, 2023).

Pre-pandemic, the most commonly reported primary motivation for short-term international visitors to Australia was holidays, which accounted for 47% of all journeys. Visiting friends and relatives constituted 30% of these journeys, while business and education accounted for 7.1% and 6.6%, respectively. The average length of stay in Australia was ten days. (ABS, 2020)

In contrast, in the 2021-22 financial year, the main reason for short-term visitors to Australia was visiting friends/relatives (55.9%), followed by holidays (17.8%) and business (7.8%). Female visitors demonstrated a higher likelihood of citing 'visiting friends or relatives' or 'holiday' as their primary purpose for the journey, compared to male visitors, who reported 'business' or 'employment' as their main reasons more often than females. The median duration of stay in Australia during the 2021-22 period was 26 days, decreasing as Australian border restrictions were loosened in June 2022, with short-term visitors having a median duration of 17 days. This closely mirrored travel behaviour prior to the onset of the COVID-19 pandemic. (ABS, 2023)

In terms of age demographic, both 2019 and 2022 saw the greatest proportion of short-term international visitors comprised of individuals aged between 25 and 29 years old (ABS, 2023).

A constant trend occurs in terms of the state of destination, with states that are home to major cities and iconic landmarks tending to experience a greater influx of international visitors annually. New South Wales, Victoria and Queensland are the most visited regions in Australia (TRA, 2022).

4.3 The youth travel industry in Australia

Young generations represent the largest cohort of international travellers to Australia. A correlation can be drawn between what younger cohorts seek when travelling and the country's unique characteristics. As observed in the previous chapters, today's youth generations are looking to push themselves out of their comfort zone and explore the world in a way that allows for personal growth, self-discovery and self-reliance. They favour immersive experiences that offer an authentic, local view of a destination and its culture and seek out sustainable tourism options that protect the environment and benefit local communities. Rather than simply following the traditional tourist routes, they prefer to create their own unique experiences and feel free and independent. In this perspective, Australia's reputation as an ecotourism hub and its vast array of national parks, beaches and wildlife make it an attractive choice for those looking to explore unique and stunning landscapes. Travelling in Australia typically involves a love of the outdoors, popular activities include hiking, camping, fishing, and bushwalking, as well as experiencing wildlife and its unique habitats. From exploring the rugged outback to surfing and snorkelling on pristine white beaches, Australia is seen as a country for adventurers, offering the possibility to take part in extreme sports such as skydiving, bungee jumping and scuba diving. Additionally, cultural experiences can be found in the country's indigenous communities and Aboriginal cultural sites.

Although a variety of motivations is present when talking about young visitors to Australia, the following paragraphs will be focused on the so-called backpacking industry, as it is believed to be the most accurate representation of such values and interests described above and in the previous chapters, that are largely embraced by Generation Z members.

4.3.1 The backpacking industry

The Australian international tourism industry is home to a booming backpacking sector, which almost predominates the youth travel market. The backpacking industry has emerged as a significant contributor to international tourism expenditure in the country, consistently accounting for a large percentage of spending by international youth travellers. Backpackers from all over the world look to Australia for exciting and unique experiences. Its many varied landscapes, activities, and adventures provide intrepid travellers with plenty of opportunities for exploration and discovery. In turn, this industry plays an important role in attracting foreign visitors and contributing positively to the nation's economy through travellers' spending on accommodation, food, tours and transport. Their spending on leisure activities helps to stimulate tourism and create more jobs in the tourism sector. Backpackers are also often 'working holiday makers'. They provide an important source of labour for seasonal work in regional areas, under industries such as agriculture and hospitality. This helps to boost local employment and supports regional and rural economies.

4.3.2 Backpacking explained

Backpacking can be defined as a form of travel characterised by low-cost, independent, often long-distance travel in varying cultural environments. It involves a wide range of activities, from short-term and leisure travel to more extended lifestyle-oriented adventures. Both short and long-term backpacking trips are typically undertaken by adventurous, independent and curious young people, including university and college students, recent graduates and young professionals, seeking unique and immersive experiences. Backpacking typically involves staying in hostels, lodges and other inexpensive accommodations; transporting belongings, such as over-the-shoulder backpacks, to destinations; making various modes of public transportation an integral part of getting around; and avoiding packaged and expensive forms of travel.

The literature review on Generation Z confirms that young travellers tend to engage and prefer such types of journeys, thus making backpacking an optimal choice for them. Backpacking is an attractive model for youth travel because it allows for an adaptable and independent way to journey without having to adhere to a rigid itinerary or timetable. Spending time making connections with local people, participating in local customs, or just exploring a travel destination one-on-one. Minimal planning or structure, allowing for constant adaptability and a strong emphasis on spontaneity, are key features. Backpacking is the choice for travellers looking for cultural insight and adventure rather than strictly relaxation or luxury. As an independent way of travelling, backpacking is often pursued solo. For this reason, solo travel and backpacking can be seen from the same lens, since both emphasise the self-reliant and autonomous spirit of travel while also fostering the need for socialisation and encountering like-minded people in the destination.

In this context, Australia has always been known for attracting travellers interested in journeys off-the-beaten paths, natural landscapes and confronting experiences for personal growth. Autonomy and curiosity are two core reasons why backpacking and solo travel have become increasingly popular among this demographic, allowing them to pursue discovery with greater freedom than ever before. For the peculiar ways the country requires travellers to move around, Australia serves as an ideal destination for these intrepid adventurers.

4.3.3 Working holidaymakers

Young travellers engaging in a backpacking trip in Australia often find a way to earn an income that allows them to keep up with the high living costs of the country.
While some are motivated by the desire to sustain their journey, others may apply with the aim of obtaining a second permit that allows them to remain in the country for an additional year or even to move there. Nevertheless, the majority of working holidaymakers engage in agricultural work, as it is largely available and perceived to be a straightforward way to gain low-level employment without the need for any specialised abilities or language knowledge.

Introduced in 1975, the Working Holiday Visa allows young people between the age of 18 and 30 to visit Australia for an extended period of time and to sustain themselves through short-term employment in any industry while there. The work is restricted to six months with any single employer. The visa has a cost of 510 Australian dollars and lasts in a total of 12 months. To obtain a second visa, applicants must complete three months of work in the subclass specified sectors, which include any regional primary industry.

As reported by the Australian government, today, the largest number of visitors under this visa comes from the UK, followed by young people from Taiwan, Germany, South Korea and France. Data also shows that the vast majority of second visas have been granted to those employed in agriculture (90%), with the remaining in construction or mining work. Thus suggesting that the so-called 'farm job' is the most popular choice among young travellers, probably due to the availability in the number of opportunities.

In July 2021, the government widened the types of jobs available to visa-holders, adding tourism and hospitality work in northern Australia to the previous list, which already contained farming, fishing, mining, construction and bushfire recovery work. This decision only regards the northern regions and may be due to the remoteness of the areas and the subsequent low affluence of young visitors.

The implications of abiding by the rules of this visa are complex and sometimes controversial, as they have reportedly caused a disadvantage for travellers.

4.3.4 Controversies about the WHL visa

Many controversies have emerged over the years as a consequence of young travellers reporting poor conditions and treatment in their working experience as employees in farms.

A report from the Australian government acknowledges that "*Student and Working Holiday Visa holders are often very reliant on any income they can get for basic living costs. This makes them more willing to accept jobs that do not meet legislative levels for Australian income, terms and conditions and safety standards*" also recognising that

“t*he linking of eligibility for a second WHV to three months employment in regional areas in industries such as horticultural and hospitality, has exacerbated the problem of employer exploitation amongst this group.*” (Migration Institute of Australia, 2016)
In the same report, the Australian Council of Trade Unions suggests that the requirements should be changed because they create “*conditions for systemic abuse of backpackers*”.

On the other hand, the Australian Chamber of Commerce and Industry highlighted the financial advantages for Australia of the Working Holiday Maker (WHM) program, particularly the money spent by individuals on accommodation, transportation, and education. The controversy regarding exploitation is disguised under the cultural exchange that such opportunities offer the travellers, providing a better understanding and appreciation of the country by experiencing “*the Australian lifestyle and interacting with Australian people*” that wouldn’t occur if they travelled on visitor visas. It seems here that governmental organisations are divided into two, suggesting an attempt to downplay the issue, providing excuses to make it seem beneficial for travellers. In fact, today it is common knowledge that these exploitative conditions still persist.

Exploring the Australian government's official website reveals that the primary focus is on maintaining the domestic economy rather than serving young travellers' needs. Referring to the important contribution of holidaymakers to the economy, the following words are used:

“It is well established that WHM entrants make a significant contribution to the Australian economy. Any policy changes that could inadvertently reduce the number of temporary workers available under this scheme is of concern to many employers. [...] In the 2015–16 Budget the Government announced a plan to change the tax status of working holidaymakers from that of ‘resident’ to ‘non-resident’ from 1 July 2016. The proposed change would mean that working holidaymakers are taxed at significantly higher rates. Since this announcement many stakeholders—particularly those in the agriculture and tourism sectors—have expressed concerns that the measure will significantly reduce the number of backpackers coming to Australia on working holiday visas and thus create labour shortages. [...] the Government would review the taxation

of working holiday maker visas to ensure our labour supply is adequate and Australia remains competitive globally"[38].

Both the increase in tax rates and the fear of a decrease in the number of employees seem to suggest that the system is more focused on securing a satisfactory outcome in terms of the internal economy than on the support of backpackers.

The same webpage also reports, in a quite dismissive manner, the issue of exploitation of working holidaymakers, citing a documentary from ABC - the national public broadcaster in Australia - as follows: *"The documentary alleged that working holiday makers (predominantly from Taiwan) employed in the agricultural sector were often underpaid, over-worked and forced to live in substandard accommodation. Some non-English-speaking women interviewed in the program reported being preyed on by employers or labour-hire contractors and made allegations of sexual harassment and sexual assault."*[39] The report talks about 'pervasive exploitation', pursued above all against workers from Taiwan, Hong Kong and South Korea with low English language proficiency. The way the information is structured on the website suggests a slightly discriminatory approach towards certain nationalities and unskilled workers, confirmation of which could be also interpreted in the recent agreement Australia stipulated with the UK. The new Free Trade Agreement will allow UK citizens to have their second-year visa without the need to be employed in regional work. On the other hand, afraid to lose a great number of workers, the Australia government worked out a new visa scheme enabling recruitment from ten South East Asian nations to replace the loss of British citizens, suggesting discrimination and the pursuit of exploitation of other nationalities. The Australian Workers Union, indeed, declared that the proposal will lead to a surge of mistreatment and exploitation of employees in the agricultural industry. However, the scenario suggests that the country is not intended to address the problem and recognise that it is in fact described as 'exploitation' by many sources.

What, indeed, emerges from other sources, such as travellers' direct reports, complaints on social media and other non-governmental sources, is that such exploitation is widespread among every young traveller, independently of nationality.

[38]https://www.aph.gov.au/About_Parliament/Parliamentary_Departments/Parliamentary_Library/pubs/rp/rp1617/Quick_Guides/WorkingHoliday

[39] ibidem

The lack of human rights, systemic underpayment of workers, above-market deductions from wages for 'living expenses' and substandard living and working conditions are common themes. The conditions not only occur in relation to the working environment but also in the accommodations, as the same farmer often provides them due to the remoteness of the areas. Having no choice but engaging in the subclass of work required by the permit or lack of skills, travellers often find themselves in uncomfortable situations. Worst cases have reported death and physical abuse, but exploitation of any kind is common among many backpackers.
This suggests that the imbalance of power has been caused by a lack of protection from the law, leaving one side with more power than the other and travellers with no choice but to adapt to those conditions. The situation, defined as modern slavery, seems due to the government's failure to adequately regulate the program. The perspective reported by the official authorities also suggests that any improvement in regulation will first benefit the industry more than the individuals.

Interestingly, a permit referring to skilled work has been implemented recently. The government reports that the 'skilled subclass' has seen significant rises above all in onshore applications, suggesting that many of the applicants are international students or working holidaymakers already in the country. This is evidence that a lot of young travellers are obliged to engage in non-skill work that they wouldn't undertake otherwise, being most of them skilled.

Generalising is not good practice, for which we must acknowledge that not every farm is exploitative. Thus acknowledging that not all farms are exploitative does not absolve us of worrying about the widespread and common poor conditions that do exist.

To sum up, the Australian travelling sector relies heavily on young travellers to support other primary sectors, which in turn leads to a dynamic of dependency that put forward economical interests over human welfare.

In terms of catering to the needs of young travellers, Australia has the need to improve many aspects of its offer. Rather than relying solely on the country's natural resources and attractions, the sector must focus on providing better services and products in order to fulfil the specific wants and needs of the target demographic. This, not only include support and protection by legal standards, but also takes into account the small details that can make a huge difference in their experience.

Further insights on the necessity of improvement will also emerge in the Findings Chapter, where the experience of travelling to Australia will be analysed through the words of actual travellers, to uncover pain points and delights and individuate room for improvement.

Chapter V

METHODOLOGY

5.1 Introduction

This chapter will describe the processes and methods used for the data collection that supports the thesis statement. The techniques employed to collect the data were inspired by the discipline of User Experience (UX) research, which have been adapted to best serve the purpose of this paper.

In particular, this study has been supported by the collection of qualitative data through user interviews, which have been then analysed following the main steps suggested by the UX Research methodology. This specific methodology has been chosen as a consequence of the recognition of its ability to provide accurate and meaningful insights about travellers' experiences aiming at an in-depth approach and a full understanding of the users.

UX principles and academic research are two distinct yet mutually beneficial approaches to problem-solving. Academic research supported the case from a scientific perspective and offered the rigour and structure necessary for exploring the background of the study; while UX principles provided a practical framework for collecting current data, directed to designing user-centred solutions. In this perspective, both UX and academic research can be enhanced by learning from each other, leading to more effective and impactful outcomes.

The first part of this chapter will provide an overview of UX Research and its related concepts, including objectives, methods and benefits. The second part of this chapter will provide a detailed description of the collection of data employed for the present research.

5.2 Qualitative data collection

In order to ensure a correct understanding of the value of the methodology used for the data collection, a premise is needed here on the definitions of qualitative and quantitative data.

Quantitative research is a data-driven approach that makes use of statistical measures to assess relationships between variables or within a given sample, which is usually large in number. The value of this method lies in its potential to identify trends, providing clarity and consistency as it allows for the standardisation of the results. Examples of typical quantitative data collection are surveys, questionnaires and agency reports based on statistical analysis.

Qualitative analysis, on the other hand, is the study of factors that are not representable via numerical values. This type of analysis is concerned with understanding the reasons behind patterns and relationships, and relies on non-numerical data such as opinions, values and beliefs. It is generally more accurate and reliable than quantitative analysis because it allows for a more in-depth exploration of the phenomena under evaluation. Additionally, it uses personalised assessments to evaluate the dynamics of a particular situation, enabling experts to form a comprehensive understanding of the contextual elements at play, by taking into account the tone and sentiment used by respondents during conversations, which would otherwise be lost in quantitative analysis. For this purpose, qualitative research often uses unstructured methods and is more subjective, leading to uncovering underlying themes and feelings associated with the user's pain points. Last but not least, it is also more open to changes in the research questions as the data is collected, which allows for a higher level of flexibility, and thus accuracy. Interviews, focus groups and self-reports are all examples of qualitative approaches.

To sum up, contrary to quantitative methods, qualitative research focuses on quality and thus usually proceeds by collecting an extended amount of data from a smaller number of users. Qualitative research deals with words and meanings, allowing to explore concepts and experiences in more detail.

The collection of qualitative data is ultimately adopted with the aim of reaching a comprehensive understanding of the user's *Job to be done*. The concept of JTBD (Jobs-To-Be-Done) comes from the work of Theodore Levitt, an American economist, who coined the term in his 1960 Harvard Business Review article, "Marketing Myopia." In the article, Levitt argued that companies should focus on the job their product or service was designed to do rather than the product itself. This concept has since been expanded to include customer needs and preferences and is now a widely accepted marketing concept and one of the main approaches used by UX researchers to investigate and discover the user's real needs and wants. The identification of jobs that are being performed poorly in customers' lives is fundamental to successful innovation and this should be followed by the design of products, experiences and processes that are tailored to those jobs. By the creation of JTBD statements, researchers are able to identify the customer's goal and outcomes in a particular context, leading to improvement in the design of products and services that make it easier for customers to achieve their goals.

With all that in mind, the paper made use of quantitative data in order to explore existing/available sources on the topic discussed, through the literature review, while adopting a qualitative research approach to gather information aiming at validating or not what is stated by the sources consulted.

5.3 User Experience Research Methodology

User Experience, shortened as UX, is a research methodology that studies the relationship between the user and the product. UX Research methodology was introduced by Don Norman in 1988, under the name of *User Centered Design (UCD)*. It describes the design process as iterative and states the importance of relying on understanding the needs, preferences and behaviours of the people who use the products in order to build solutions tailored to them. Coming from its application in the digital and tech context (e.g. the design of websites), this idea has been further developed and refined over the years to form the foundation of modern UX methodologies, and it has been applied to a variety of sectors involving different kinds of products.

The common basic goal of UX applied to research is to get to know the customers better. The way this method proceeds towards the research goal differs from canonical approaches, which are mostly reliant on quantitative data. A qualitative approach is considered to be at the core of the UX data collection process and analysis, as it allows for the acquisition of not only meaningful insights but also up-to-date and detailed information. User research provides comprehensive and detailed information on behaviours and attitudes, allowing for a thorough examination of why individuals behave and think in a particular way. It enables researchers to gain a greater understanding of user experience and motivations, providing a nuanced perspective that informs design decisions and improves the user experience. By delving deeper into user behaviours and attitudes, user research can provide a more expansive understanding of underlying reasons, allowing for the development of more effective strategies and products.

The field of UX has grown broadly today and includes a wide range of methodologies and approaches, each of which is used in relation to the desired outcome. Most projects usually benefit from multiple research methods and from combining a variety of insights.

For the purpose of this thesis, one main method of collecting data has been used. As a consequence, in order to avoid impractical specifications, only the method of user interviews and the subsequent steps of analysing them will be described in detail.

5.3.1 User Interviews in UX

User interviews are a generative method of informing the design of a product, would it be to uncover potential opportunities for improvement or to develop new products. They can be applied throughout the product development cycle, from the initial concept of ideation through to testing and post-launch monitoring.

Also defined as in-depth interviews, they are often semi-structured conversations lasting between 30 to 60 minutes with an individual participant, wherein the researcher inquires, by asking a series of non-leading questions, about a pertinent topic in order to gain an understanding of the participant's attitudes, beliefs, desires, experiences and related expectations and frustrations. User interviews provide a background of information then used for the development of strategic thinking in designing products or services, that serve to optimise the user experience, ultimately resulting in a more successful product.

User Interviews are a primary source of qualitative data. This data must then be analysed and synthesised into visual and descriptive representations such as personas[40], journey maps[41], JTBD statements[42] and user stories[43]. These methods help to provide a more holistic view of user needs and they are used to optimise the design process by providing a common language to facilitate communication between stakeholders and members of different teams. The directness of the participant's voice makes these accounts particularly powerful and builds up the value of adopting such a method as it is evidence-based and genuine.

Key factor in performing user interviews is the interaction with the users, which allows the researcher to empathise with them and promote communication. This leads, in turn, to outcomes that may often vary from each other and cannot be standardised for mathematical analysis. On the other hand, thanks to space for interpretation, this type of research is excellent for gaining insight into the user's truthful experience and opinion. Attention is paid, indeed, to feelings, body language, ways of expression and tone of voice. In addition, being the structure flexible, the progression of the interview ranges from fixed questions to open scenarios of discussion, as new information emerges.

[40] User personas are fictional representations of a product's target user base, created to provide designers and developers with a shared understanding of user needs, goals, and behaviours, enabling teams to make decisions that are aligned with user needs. Personas are typically constructed using data from user research and interviews. Furthermore, personas can help identify potential user groups that have not been considered. By understanding the different user segments, product teams can develop a better understanding of the design and development needs of different user types.

[41] User journey maps are visual representations of a user's experience with a product or service, used to identify pain points and improve user experience. They are useful because they provide an end-to-end overview of user interactions with a product, allowing designers to identify and address issues that could impede or frustrate the user. User journey maps provide an accessible way for stakeholders and other team members to visualise the user experience, helping to ensure the product meets user needs.

[42] A JTBD (Jobs-to-be-Done) statement is a narrative that describes a problem and the desired outcome for a customer looking for a solution. It is used to identify customer needs and opportunities for new or improved products and services.

[43] User stories are brief and concise descriptions of specific functionalities that a user may expect from a software product. They are commonly used in the Agile software development methodology, where they are used to capture, and to break down into manageable tasks, the user's requirements, in order to communicate them among all parties involved in the software development process. User stories are useful because they help to keep the development focused on the user's needs, as they are written in a format that mimics the user's perspective. The difference with JTBD statements is that user stories focus on the specific features and functionality that a product should have, while JTBD focuses on the underlying motivation, or job, that the user is trying to accomplish when they use the product.

Allowing users to talk freely, to express themselves with few or no constraints, the interview data collection leads to more genuine insights because interviewees are asked open-ended questions and have the capacity to talk for an extended period of time with no interruptions. On the other hand, the analysis process for this kind of data results to be more complex, as it involves active listening and accurate interpretation of the results.

5.4 Methodology of the paper

Following what stated above, as far as the tourism sector is concerned, UX research so far has been largely used to identify user needs in the design of tourist websites, evaluate user experience in hotel booking processes, and build user-centred features into travel apps, but few if none are the attempts to adopt it as a powerful source in the design of the overall travelling experience, including tangible products and services.

The present paper argues that the adoption of an iterative process to create tailored solutions for the travel experience in its totality can encourage innovation in the design of the tourism product. In doing so, UX research methodologies are valuable as they provide continuous up-to-date insights into customer behaviours and preferences, in an empathetic manner that differentiates itself from quantitative collection of data, on which the tourism sector relies almost uniquely.

The UX approach can help understand the user journey, create a better customer experience, identify areas of improvement and create new opportunities. Some examples are the design of personalised booking experiences, user-friendly websites, apps and digital platforms, and all of the tangible products and services such as accommodation, transportation, personnel, experiences and so on, that meet the real needs and expectations of customers, ultimately delivering more value and providing effectiveness and satisfaction. Additionally, as the focus of UX Research may vary on a wide range of specific areas, it can also be used, for example, to target marketing campaigns and improve customer service and customer engagement.

5.4.1 Experimental setup

The methods used in this research have been carefully selected to ensure that accurate and valid data were collected. As stated above, user interviews have been used as a primary source of collecting data in order to gain an understanding of user behaviours, attitudes and opinions. The subsequent data analysis processes were carried out according to qualitative data analysis techniques, ensuring that the interpretation of the results was meaningful and accurately reflected the user experience. The analysis included the identification of themes and recurrent patterns, along with the development of insights into the different user behaviours and experiences.

5.4.2 The recruitment process

The recruitment process of participants for the user interviews was conducted through the publishing of ads on social media platforms. This method was chosen in order to reach a specific demographic target of users, namely, young travellers. This included travellers in the age range of 18-30 years old who had a past experience or a future interest in travelling to Australia. The ads were carefully designed and structured in order to make sure that only the desired target audience was reached.

The ads featured a brief description of the research study, the requirements to participate and a link to a registration form to allow scheduling the interview. Any changes in the ads were adjusted in order to further improve their effectiveness. The regular monitoring and optimisation of the ads allowed for further improvements in the effectiveness of the recruitment process.

The recruitment posts were published in more than thirty online sources, among Facebook groups and pages, Instagram stories, Reddit discussion groups and other general travel forums and blogs, in order to allow a broad reach in terms of nationality.
There was no fixed number of participants required, since the data collection method chosen focuses more on the quality of the data rather than the quantity. Interviewing too many people can make the analysis process rather overwhelming and difficult, given the nature of the data collected and the impossibility of treating them as numbers. It was important, though, to collect just enough data. The number of participants interviewed was ultimately five. These numbers were considered sufficient to gain in-depth data without, however, claiming for a full representativeness of the studied population.

5.4.3 The interviews

The choice of user interview format to collect data was motivated by the willingness to let the user speak for themselves in an unbiased situation. The value of employing semi-structured generative interviews is, indeed, represented by the mitigation of biases and assumptions from the interviewer. For this purpose, the script was aligned around words like *'How'*, *'Why'* and *'What'* and formulations such as *'Can you tell me more about [topic]?'*. This led to guiding the interviewees toward their own answers, rather than prompting them toward specific responses. The script's layout was designed to keep the interview conversational and free-flowing, serving just as a high-level guide to help keep the discussion on the right path.

All participants were informed of the purpose of the research, the duration of the interviews, and the expected data collection methods. To ensure that all participants understood the research process, they were given the opportunity to ask questions.

Specifically, interviews were conducted with a semi-structured approach to ensure that the same basic questions were asked to all participants, while allowing for a variety of open-ended discussions. Interviews were conducted using a conversational format, which allowed for a more accurate data collection process. The interview script was designed to capture the user experience, attitudes and opinions, as well as the demographic data of the participants.

The script allowed for a division into three phases: the introduction of the participant, aimed at gaining demographic information; general high-level questions, to understand the user's opinions towards the concept of travel; specific topic-related questions regarding their experience in Australia, investigating in details their journey in the country. The interviewees were asked questions about both past behaviour/experiences and hypothetical scenarios, wishes and future plans about travelling.[44]

[44] For more details, see Appendix 1.

Interviews were conducted online through the Google Meet platform and lasted between 45 and 60 minutes.

The analysed data was then compared to secondary data sources in order to highlight similarities and differences and explore spaces for possible suggestions for improvement in the performance of the tourism sector.

Overall, the methodological approach used for this study was designed to ensure that the evidence collected was reliable and could be used to support the thesis statement and highlight new discoveries.

5.4.4 Analysis and synthesis of the results

The process of research analysis and synthesis is a critical aspect as the value of user research data is not immediately apparent until it has been methodically examined and condensed into a concise form that can be used to inform decisions and influence strategies. Through the analysis and synthesis of such data, it is possible to identify patterns, themes and stories that are significant in the context of the research question and can be used to create actionable insights. This involves sorting, categorising and transforming the raw data collected into valuable information and eventually reaching a conclusion. It is ultimately the responsibility of the researcher to determine how to interpret the data collected and which approach to use, so that it is contingent upon the methodologies utilised to analyse the data. According to this process, data were analysed and interpreted as stated.

Specifically, the research analysis, or qualitative data reduction, is the procedure of organising and classifying data through methods such as thematic analysis[45], content

[45] Thematic analysis is a systematic approach to grouping data into themes that represent user needs, motivations, and behaviours.

analysis[46] and narrative analysis[47]; while the synthesis involves interpreting the data and extracting significant discoveries and key observations.

These methods were used in a mixed format that contributed to the organisation and interpretation of the results. In particular, qualitative coding was firstly used to organise and contextualise the data assigning codes to words, phrases, and sentences that represented major themes or ideas[48]. Data was then interpreted making use of graphic representations such as mind maps, word clouds, storyboards and snapshots, while the synthesis proceeded using tools such as user personas, user stories, empathy maps, journey maps and JTBD statements.

Each session was initially evaluated in isolation and subsequently in conjunction with the other sessions, seeking to identify patterns across the interviews and allowing for sufficient flexibility to capture a variety of perspectives.

The interviews were recorded and transcribed in order to allow an accurate report of the data collected and allow the interviewer to focus on directing the conversation while talking to the user.

5.4.5 Method purposes and benefits

The purpose of recurring to the described methodology was collecting data of travellers' experiences directly from them and allowing a genuine and accurate understanding of the users, to be employed in considering how the industry can better focus on the user's unmet expectations and needs.

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[46] Content analysis is a methodology used to organise large amounts of textual data by coding certain words or themes. Through the use of qualitative coding, patterns within the data can be identified and interpretations of their meaning can be made.

[47] Narrative analysis is a methodological approach that allows for the examination of stories told by individuals and the ways in which they communicate these stories. This method of analysis can be used to gain insight into the significance of particular content to the individual, their motivations for certain actions, and their perspectives.

[48] Qualitative coding is a process of categorising data from a qualitative research study. It represents a way to organise the data and identify patterns within it. It allows researchers to further analyse the data and draw conclusions about the research topic.

The end-user perspective of user interviews research and analysis allowed identifying user wants and preferences referring to specific scenarios and experiences, which led in turn to more effective, efficient and profitable product development recommendations. Adding value to quantitative data by providing a more in-depth framework, this approach can better inform design decisions and marketing strategies for future and immediate actions.

It was observed that most of the research conducted in the tourism study sector results to be heavily pre-determined by the use of multiple-choice options questionnaires or user interviews built up on leading questions, which are inherently biased. Obscuring the reality of the subject under examination, this form of research is unable to accurately represent the full depth and breadth of the real world, oversimplifying instead the issues into a set of already-assumed answers. As such, the adoption of unbiased research methods, which provide the opportunity to explore a multitude of potential perspectives, is necessary in order to gain accurate representations of the realities being studied.

The following research tried to avoid predetermination and generalisation of results at all costs. The research aimed at being free from bias, meaning that the data collected is impartial and reflects reality in all its diversity. This type of research eliminates the potential for leading questions and multiple-choice options to influence the findings. The purpose of this study was indeed to conduct interviews that let the speaker express themselves freely, with minimal or no rate of bias involved in the questions. This has led to the collection of answers related to a topic but narrated according to the order and intensity chosen by the interviewee. The method used not only enabled the gathering of truthful and genuine information, but also offered relevant insight into how the participants perceived a certain subject, the impact it has on them and the manner in which they wanted to discuss it. The speaker's perspective has been here prioritised over anything else. The objective of this research has been to investigate, in an unrestrained manner, how young adults perceive travelling, as articulated in their own terms and according to their own timing and structure of thinking. The accordance between the literature review and the findings has not been predicted or pre-determined a priori.

In conclusion, the subjectiveness of the process allowed to avoid over-reduction, or 'flattening' of the data collected into close-ended reports and jumping to decisions based only on statistical numbers. It has instead promoted space for human interpretation, which is recognised here as extremely valuable when dealing with human needs in the design process to best satisfy them.

Chapter VI

FINDINGS

6.1 Introduction

This chapter presents the results of the qualitative research conducted to gain insights into the user experience of young travellers. Interviews were used as the primary data collection method in order to gain information on Gen Z's behaviours, attitudes and preferences regarding travel. The data collected were analysed and synthesised according to the UX research methodology, with the help of the tools and techniques used by the discipline.

The chapter will focus on the main findings from each participant, illustrating common paths as well as their diverse experiences. While the results may not be generalisable due to the specific nature of each response, common themes and paths have been observed. At the same time, the variety of opinions offered significant insights into how each traveller personally lived their experience. The analysis tried to individuate common categories where possible while respecting the variety of each perspective.

The findings were derived from 5 semi-structured interviews. Demographic profiling of the interviewees is given at the start, followed by a presentation of the results. The results will be presented in a synthesised form derived from the interpretation of the information collected. As part of the reporting, direct quotes[49] are used, while the names of participants are not mentioned, to preserve anonymity.

[49] Quotes are not fully and uniquely representative of the whole discussion. They rather serve as an effective representation of the interviewees' perspective as they described it. Quotes are not reported for every single participants, but rather one quote was chosen where the sentiments among participants were agreeing.

6.2 Presentation Of The Data

The questions asked during interviews were not directed in a way that encouraged one particular answer. Instead, they covered broad topics and allowed respondents to provide personal and unbiased feedback, choosing both the quantity and quality of the information to be provided. In other words, the questions were designed to elicit open-ended responses which could be either compared or contrasted. For this reason, the depth of details of the answers each traveller provided varied, depending on the individual's personal interest and desire to talk about a certain topic. This is ultimately the character of such a method of conducting research. In other words, the interviewees had the freedom to choose what topics they wanted to discuss in depth, so their answers to the questions were unique and varied based on their sentiments.

As a result of the process described, the information collected from the interviews is not always consistent across all participants; the only consistent element is to be found in the freedom the interviewees had to choose the topics they delved into or skimmed quickly. Extremely valuable findings from conducting interviews in this manner are in the observation of the choices made by the participants. This ultimately suggests the importance of paying close attention not only to the content received from participants but also to how they choose to engage and interact with potential questions.

6.2.1 Demographic profiles

A key feature of research involving human participants is the collection of demographic data, which provides readers with a contextual understanding of the results. This enables to gain insight into the implications and applications of the findings.

This research focused on Generation Z, thus necessitating age as a significant criterion for qualifying a participant. The recruitment post specified the target group as those born after 1995[50]. During the interview process, participants were asked to provide their year of birth, guaranteeing that the relevant age group was being interviewed. The age of the participants ranged between 22 and 28 years old.

No requirement specification on the country of origin was mentioned. The reach of the recruitment posts had the intention and the tools to be broad, offering the opportunity to participate to all nationalities. However, of the five participants in the study, four were from Italy and one was from Indonesia. Notably, nationals from Italy were more likely to participate in the interview and provide help compared to those from other nationalities. This is in itself a valuable insight into Gen Zers' social behavioural patterns, suggesting that young generations have a greater affinity with their own nationalities[51] than with foreigners.

Other demographic data also included gender and socioeconomic status. Two of the participants identified as male, while three as female. In terms of socioeconomic background, two had established careers; two had just graduated from university; finally, one left the home country directly after completing high school.

In addition to collecting demographic data, the researcher also asked questions related to the psychographic context[52] of the participants (e.g. values, interests, lifestyle choices, perception of self, etc.). By combining both sets of information collected from each participant during this study - demographics and psychographics - a more complete picture for understanding each individual was made possible.

[50] Although agreeing with the definition of generational cohorts provided by the Pew Research Center, which places Generation Z between 1997 and 2012, the data collection process did not follow age limitations strictly when gathering research participants. The choice for more leeway and flexibility given to recruiting people in wider ranges of ages ultimately served as an experiment to understand how generational cohort cannot actually be defined only based on age.

[51] The nationality of the researcher is, indeed, Italian.

[52] Psychographics is a marketing and market research tool used to categorize consumer segments based on shared personality traits, values, attitudes, interests, and lifestyles. It provides a deeper understanding of consumer behaviour by examining how psychological and social factors can influence a consumer's decisions.

6.3 First Interview Phase

The findings will be presented in two phases, conforming to the structure of the interviews. The first phase will present a synthesis of the data collected from the higher-level questions, detailing the travelling behaviours, habits, preferences and motivations of the participants. This will be followed by the second phase, which will focus on the specificities of the Australian experience.

6.3.1 Analysis and interpretation

The thematic analysis was able to identify patterns in the data that related to the research questions being asked. This analysis was able to generate codes, themes and labels that provided insight into the data analysed. Those tools served to categorise where possible the great variety and amount of information collected, in order to facilitate its interpretation. Specifically, the labels used were indicating the drivers, delights, pain points and behavioural patterns of the participants.

The different topics were discussed in varying degrees throughout the conversations, ranging from prominence to absence, depending on the participant's choice.

To serve a clearer presentation of the findings, a subdivision in topics has been followed.

a. General sentiment toward travel

When asked about their sentiment towards travel, all of the participants responded positively, stating that travelling had a good impact on their lives. All of the participants stated that travel was an important part of their lives. This suggested that travelling didn't seem to be an option for them, but rather a necessity.

"Every spare time we have, we use it to go somewhere else. We never stay in the city."

"It's a lifestyle, a constant in my life; even if I were in my home country, I would keep travelling."

Moreover, mentioning the pandemic period, one of the participants expressed the frustration of not being able to travel. This indicates that young travellers, although being aware of the risks and responsibilities that the pandemic brought, show resilience and demonstrate a strong will to travel again internationally as soon as possible.

Some of them emphasised how travelling with their families at a younger age had shaped and influenced the way they approached travel as adults, making it an integral part of who they are. Travelling was seen by many not just as something fun to do occasionally but rather viewed in terms of its impact on their personal growth and development over time.

"It's been a huge part of my life, ever since I was young."

"I remember when I was a child, I used to go abroad on holiday with my grandparents, who would take me to museums and cultural hubs."

This last statement sheds light on an important insight, observed as well in the literature review: having positive memories is fundamental for Gen Zers.

It is important to understand how the creation of meaningful travel moments for this generation can link with their long-term engagement not only with specific destinations but also with the action of travelling in general. Travelling is no longer seen as a superficial means of marking off visited countries, but rather becomes an opportunity to create strong emotional connections and lasting memories. As such, it may be argued that young people are increasingly making conscious decisions with the goal of truly immersing themselves in the world around them, establishing real relationships and deeply engaging with their environments during travel experiences.

b. Main drivers and delights

Discovery and curiosity were mentioned as the main drivers for travel. Participants appeared to be curious about the world around them, expressing their desire to get in contact with different cultures and unusual landscapes.

"Hopefully, someday I will cover the globe."

One of the participants stated that they usually select a destination based on what they intend to learn, recognising that each location carries its own unique resources.

The educational value of travel was significantly focused on acquiring cultural experiences and learning about local communities and their histories, but never by a forced intention.

"When I travel, I want to understand the locals, their day-to-day life, and immerse in the culture."

"If there's something interesting, I want to learn about it."

Furthermore, when emphasising the need to get in contact with the place and its people, one of the participants argued her perspective on the difference between travel and holiday tourism, stating that travellers promote a stronger and more active disposition to understand the place they are visiting and create genuine connections with the locals.

"I can feel that the mentality is different [referring to holiday-makers]."

The research revealed that people felt a sense of deep personal growth and spiritual value from engaging in travel experiences, particularly when these trips were taken alone, to far-off destinations. Taking risks and challenging oneself were the most appreciated boosts to trigger the thrill of travelling, and fuel to foster self-confidence and self-reliance. Participants showed an approach to challenges that is proactive and optimistic. Adaptability and questioning oneself were often seen as positive outcomes.

"Going out of my comfort zone. Discomfort is the stimulus you need to move forward and do incredible things."

The discomfort brought about by venturing into unfamiliar places was perceived as immensely satisfying, as it helped develop a sense of self-confidence and independence. By pushing personal boundaries through exploration, participants opened themself up to new experiences, which in turn heightened anticipation and built excitement for further travelling. This was a recurring sentiment, above all from the Italian participants, who perceived travelling to Australia as a challenge itself, due to the long distance.

c. Typical behaviours and pain points

When asked what their typical trip looks like, participants described behaviours related to different aspects of their travelling habits. Although similar opinions could be observed, each participant had a unique and personal perspective on the topics discussed, thus demonstrating the variety of personalities and behaviours that can be found within one generational cohort. This diversity is easily viewable in direct quotes. Even though they may be minor, differences in details are worth exploring in order to gain a more comprehensive understanding of the individual.

Regarding the sphere of planning their trip, all participants gave the impression of preferring a minimal plan to function as a guideline while leaving flexibility on the way for spontaneous and impulsive changes. However, while older participants seemed to be slightly more organised and goal-oriented, younger interviewees claimed freedom of movement, adaptability to discoveries or to people met along the way and a tendency for last-minute deals. They also depicted themselves as open to changes in case something went wrong.

“Nothing is set in stone.”

“I always set an intention and the kind of environment; the rest is left free.”

“I usually make a plan of the must-sees, but if something pops up, I have no problems changing my plans.”

“You can make plans, but you'll never follow them”

“I'm adaptable. I'm a dynamic thinker.”

Nevertheless, in being flexible, they were also extremely well-informed. They expressed wanting to know all possible options in order to be aware of the best way to proceed. Searching for information from a variety of sources, including leading platforms and unpopular YouTube channels, or speaking to local and peer travellers, were the reported methods of research. On the other hand, one participant highlighted a lack of interest in spending too much time finding information, preferring to act as spontaneously as possible.

The above-depicted approach pairs with their quest for good deals and payed-back value. The interviews confirmed that Generation Z wants more value for less money.

“I search for good deals and book in advanced to save money.”

Participants expressed a strong desire to seize every opportunity available to them and demonstrated a heightened awareness of what were perceived to be the most commonly recognised activities and sites. They expressed a keen interest in both cultural and natural experiences, demonstrating a desire to get a 'taste of everything' and to explore opportunities even if they were not of particular interest.

In relation to this concept, two different behaviours were observed. One of the participants described her typical journey as fast-paced and dynamic, while another expressed the necessity to move slowly. Interestingly, the motivations behind those two behaviours were similar. Both participants argued that they wanted to be able to gain as much value from the place as possible. The differences suggest that, while the first participant perceived the value by the number of items, the second was more concerned about the quality of the experience, the depth of understanding and the chance to dedicate enough time to observe. In both cases, the participants displayed a propensity to maximise the benefits and value obtained from the place, albeit in different ways.

These findings may also suggest a link with the phenomenon of Fear of Missing Out, as it is represented by a sense of urgency of not wanting to miss out on any potential opportunities or experiences.

As far as interests are concerned, participants seemed to be attracted by both cultural/historical attractions and natural landscapes along with the possibility of engaging in adventurous activities. It was generally accepted that tourist attractions are a popular draw, yet in most cases, there was a preference for venturing beyond the conventional path.

“I’m not interested in the city. All I search for is nature.”

“I’m fascinated by architecture, above all big city's skylines.”

“I love exploring and engaging in sports and activities. I tend to visit islands or mountain sites.”

“Culture is not a priority. It must be an interesting story. Otherwise, I don't search for it.”

These findings demonstrate that despite a tendency towards pursuing touristic attractions, young travellers are increasingly interested in further exploring the destination in an active and experiential way, rather than engaging in over-touristic excursions.

It follows another major insight: participants rarely or never relied on physical travel agents but rather preferred to plan their trip independently online through different OTAs. This approach facilitated greater autonomy and control for travellers, who were able to create personalised trips and save money. One participant highlighted how the satisfaction of 'crafting' her own adventure and seeing it realised was gratifying. By planning the itinerary independently, she also displayed greater consciousness of the potential risks associated with data management and privacy, indicating some sense of empowerment. As such, this revelation also promotes further exploration into the psychological and sociological implications associated with this trend, particularly in regard to the increasing self-reliance of young travelling individuals.

"I don't want someone else doing it for me. I think it's satisfying planning your own trip and seeing it realising. Planning is part of the travel. Otherwise is half the experience."

"I want to know what's going on with my data."

One of the participants also showed a more conscious engagement on social media. A sensibility regarding the broad reach of social media and the awareness that it can often extend outside of one's intention was cited. This suggests that the participant perceived the sharing of personal content as something meaningful and not superficial.

"I don't like sharing my experiences with random people on social media."

Another issue was raised regarding social media. Participants expressed relying on social media platforms for inspiration and suggestions, with Instagram being mentioned above others. On the other hand, one interviewee expressed her frustration about cultivating high expectations that were often unmet. The participant believed that social media can create unrealistic expectations by displaying misleading images that don't reflect reality. When she faced the reality, her expectations were not met, leading to feelings of frustration and distrust. This is another important insight highlighting a sentiment of distrust towards the use of social media.

“I used to have crazy expectations about places. What you see on Instagram most of the time is exaggerated. It just doesn’t match reality, so I started lowering my overall expectations.”

Supporting local cultures and adapting to different ways of living was agreed upon by all participants. Having a positive impact on the place visited seemed to have a fundamental relevance on the way interviewees see themselves when travelling. Respect and understanding of the host culture were perceived in itself as a fostering factor for self-growth as achieving openness and adaptability. Ultimately, the desire to be part of the environment they were in contact with put them in a position of authentic engagement rather than superficial interest.

“I think it’s fair to support the host community, give them the possibility to be authentic and adapt to their costumes.”

Another emerged behaviour was related to the social realm of travelling. Participants reported engaging in travel both solo and in the company of someone else. Whatever the case, the search for the right companionship was highlighted as a crucial factor. Hostels, in particular, were appreciated thanks to the opportunity of meeting peer travellers and like-minded people.

The concept of selective socialisation came to light as well, suggesting that travel provides an opportunity to find and connect with people of similar interests, thus allowing for the selection of the social context in which to engage. By connecting with people with shared values, the participants had the opportunity to explore the social environment in which they were interacting. This provides an opportunity to create meaningful connections with others who share similar values, interests and perspectives. This also relates to the previously observed perception of the difference between travellers and holidaymakers.

“The right company is important when travelling.”

Social engagement was also seen as a powerful source of personal growth and self-confidence, as forming meaningful relationships with those of similar beliefs could provide a sense of belonging and acceptance that last for extended periods of time. Additionally, having a greater understanding of other people's perspectives and lives allows individuals to gain valuable insights and become more open-minded towards those outside of their social circle, allowing for more tolerant, enjoyable, and peaceful relationships with a greater understanding of the world.

6.4 Second interview phase

The second phase of the interviews regarded specific questions about the experience of travelling to Australia. The questions covered the entirety of the traveller’s journey as well as the different aspects of each phase. Many concepts explored align with the ones in the first phase of the interview since when asked about their travelling behaviours, participants recalled specific past experiences, with Australia being one of them.

Furthermore, extremely recent and accurate insights about the current state of the country’s industry could be gained as well in this section.

6.4.1 Analysis and interpretation

The first questions provided answers about the motivations for travelling to Australia. Surface motivations were: visit family and friends, leisure trip, internship and bleisure. Interestingly, if looked at in more depth, the real drivers were different. One participant emphasised her need to escape from her reality in the home country, thus departing as soon as graduated from high school. Another participant found himself the chance for an internship abroad, wanting to end up in an English-speaking country to master his skills. While another expressed the will to travel to the farthest existing destination as a proof of courage.

The need to shake up the routine and break away from the expected paths one is accustomed to was a common theme for those coming from Italy. This brings back to the idea of exiting the comfort zone to feel that discomfort perceived as a stimulant of self-growth and development.

The bleisure trip-driver was noteworthy as well. As the literature confirms, Gen Zers are increasingly participating in careers which provide them with the opportunity to experience of a business journey combined with leisure activities. Taking advantage of their locations while on work assignments, they seek out additional experiences such as sightseeing and other recreational pursuits.

Australia was perceived by travellers as the dream country, a not well-defined ideal, mysterious and fascinating. The theme of nature also came out as the country was perceived as a land with breathtaking landscapes and exotic wildlife. One of the participants remained surprised by the discovery of the marine environment and got passionate. Other participants reported engaging in long walks, activities such as climbing, snorkelling and visits to natural sites as something unique one can only achieve in Australia.

Regarding the planning phase of their travel, participants reported that all helpful information was largely achieved from online sources. They cited websites and OTAs for flights or accommodation, articles and blogs to get an idea about places, potential sites and content found through social media channels comprising reviews from previous travellers. One participant also reported having personally contacted the author of a Youtube video to ask some questions in detail. This last insight suggests that, although relying on online sources, the interviewee was actively engaging in information retrieval rather than simply passively consuming it, indicating the willingness to take part in real conversations. Indeed, all of the participants reported a preference for obtaining information directly from peers and other travellers once on-site.

In this regard, communication was reported to be easy, except when talking to some locals, whose accent was perceived as a barrier, but easily overcome.

Participants in the study expressed a preference for freedom over structure when planning and organising internal trips as well. Specifically, they showed little interest in guided tours unless absolutely necessary due to restrictions placed on types of activities or timeframes. Instead, they proposed autonomy as an alternative; this would allow them more flexibility regarding times and costs associated with their journey while having greater control over the length and type of experience. Ultimately, these findings highlight that many travellers view organisation and independence as mutually exclusive concepts rather than complementary when arranging those kinds of activities.

Booking was achieved online, including flights, accommodation and other services. The web was perceived to be cheaper and gave the opportunity to compare different options. Notably, although booking online, one of the participants reported recurring to the help of an agent for consultation. As going to Australia from Italy was perceived as a big step, the speaker expressed his concern about wanting external support from an expert. This may suggest a slight sense of distrust towards online sources and a more conscious attitude towards online activities.

As far as the visa obtainment process is concerned, participants expressed enthusiasm and satisfaction about their experiences. Most contributors praised the clarity, accessibility and support provided on the official online application form, which enabled them to understand the procedure and implications with ease. They also commented positively regarding the speediness and simplicity of completing the entire application. The processing time from authorities was also fast, and participants got responses in a matter of hours. Notably, one of the participants, referring to a previous trip made five years ago to Australia, remembered that their visa application processing time had been extremely long, suggesting multiple months of waiting. These findings suggest that Australia has implemented substantial improvements towards processing visas much more quickly over recent years, safeguarding applicants from such drawn-out circumstances witnessed previously.

A comparison with the past about the fear of rejection for not respecting all of the requirements was also mentioned. It appears that today there are fewer psychological barriers: current controls on entry requirements seem lighter, and police officers tend to ask few or no questions. This may be a result of the country's intention to increase arrivals numbers in response to the losses sustained during to the pandemic.

From this perspective, the conversation shifted to how participants travelled within their country. The primary methods of transportation were either by van or car. Road trips involving camping and excursions were most commonly cited. Buying a car or van was perceived to be extremely accessible and fast. The industry in Australia indeed facilitates this process, as it is common practice that backpackers buy their own cars or vans to go on road trips along the coast. On the other hand, finding a place where to stay resulted challenging. One of the participants, who was on a road trip with her van at the time of the interview, expressed concern about where to park due to the illegality of camping in areas that are not designated for that purpose. In other words, travellers have the obligation to find suitable and regulated sites, which tend to be quite spread out rather than frequent along roadsides or off-the-beaten tracks. This poses as a challenge throughout their journey, since they have to allocate a lot of time to this research daily. The lack of accurate digital tools that map out these sites fostered frustration since travellers often have to write posts on generalistic Facebook groups hoping for a response. It is also often the case that during peak seasons, campsites may require prior bookings due to the high demand for the few spots available, affecting the price as well.

Requiring the travellers to be active, these types of trips confirm once again the seek for challenges. A self-organised road trip requires the traveller to plan the entire journey autonomously. This includes arranging accommodation, transportation and activities along the way. Finding reliable information to map out a route that is both safe and interesting enough to keep entertainment during the time on the road is essential. An itinerary which is self-organized gives people more control of their travel schedule in comparison to one that has been prearranged by others. However, being able to independently and efficiently organise is a requirement. This brings a variety of risks, above all related to the remoteness of certain areas, the long travelling distances, extreme weather conditions, such as floods and tropical cyclones, quite dangerous wildlife and prolonged heat during the summer period. To sum up, going on a road trip to Australia is perceived as a proof of strength and self-reliance.

Longer travelling distances were perceived as demanding in terms of time availability. The Australian landscape, with great distances between major urban areas, often necessitates long road trips that demand patience from those making the journey. The vast size of the landmass and the relative scarcity of towns and cities creates large distances between destinations, which means travellers must commit to lengthy stretches when taking journeys by road. One participant stated the necessity to stay on the road for a long period of time in order to be able to properly visit worthwhile sites.

Public transport, compared to private vehicles, was perceived as inconvenient outside of the city. It was described as infrequent and slow, which makes it a necessity to own a private vehicle.

When it came to accommodation, while one of the participants, being involved in a business trip, reported having made use of hotel services, the rest reported having stayed in hostels. The hostel experience was reported in a variety of feedback from each participant, mostly depending on the traveller’s personality, the location of the hostel and the different aspects discussed. From a practical point of view, hostels were rated positively. Interviewees cited cleanliness, nice staff and support. As far as the general atmosphere is concerned, the accommodation was defined as nice and friendly, and the experience was overall positive. On the other hand, one participant claimed the impossibility of relaxing. In this instance, the interviewee reported that staying at the hostel felt like being at a constant party. Surrounded by drunk people, she was unable to relax or even go to bed early; instead, her sleep and sense of peace were interrupted by strangers coming through the bedroom and making noise at any time. There were no separate areas for sleeping or conversation nor any sound insulation. The only choice was conforming to that atmosphere, willing or not. Hostels for backpackers have acquired a reputation as places of wild and raucous fun, but it appears that young people may seek out other kinds of recreation, beginning to appreciate other enjoyable ways to live their lives. Thus, the need to recognise this variety of preferences and attitudes and give everyone the opportunity to enjoy their stay without generalising on one single solution must be pursued.

Interviewees also expressed a range of other pain points during interviews. Firstly, they described lacking digital applications which would help peer travellers to share expenses. These efforts are largely made using generic Facebook groups that are

reportedly not effective enough. Secondly, participants suggested the development of an application providing information about farm job opportunities that could be easily accessed from a unique platform. These results emphasise the importance of app development by companies in creating and delivering valuable solutions tailored to meet specific user needs regarding finding peers travelling partners and obtaining more details about employment possibilities. Notably, in expressing the need for more technologically advanced travel applications, participants showed annoyance at the fact that these do not yet exist, compared to other destinations such as Europe.
This attitude suggests that today's young travellers are deeply immersed in the advances of technology, aware of its potential to solve their problems and thus heavily dependent on it. Furthermore, they expect organisations and governments to equip them with such modern tools.

Australia was perceived as safe by all the participants, likely because of the heavy police presence and generally felt respect for law. The participants of the study likely made comparisons between their home countries and Australia, leading them to conclude that it was a much safer environment than what they were used to. One participant explicitly stated that there were no security staff or measures at the hostel, but still felt safe due to being in Australia, indicating that the country is generally perceived as secure.

Attention to sustainability was perceived but only superficially. A lack of a well-structured plan in place, that would ensure long-term improvements and advancements seemed to be the main reason for the statement. The commitment level seemed low, it appears as though sustainable practices were acknowledged but not implemented. An example was reported to be the allowed circulation of very old cars and the absence of restrictions or enforcement for avoiding the circulation of particular polluting vehicles. This suggests there may be room for improvement when it comes to fully embracing sustainable practices.

The high cost of travelling to Australia suggests that young travellers are actually not searching for the cheapest option. Participants confirmed that costs of living were perceived as high without the support of an active income by Australian standards. However, the value for the money spent was perceived to be adequate. Participants were interested in finding good deals which offered value for their money. Reaping greater benefits from limited resources was seen as a major behaviour among all the participants. One example was reported by an interviewer who was proud not only to have found a good deal in terms of price but also to have chosen a single long stop-over in Singapore in order to be able to visit that country as well. As the costs of living are high, a stop-over in Singapore is clearly not the cheapest option. Yet, it's the chance to visit a second country and make the best use of their time and opportunity while reaching something else, that makes the deal.

The selective socialisation topic was recurrent in relation to Australia. The participants seemed to want a kind of individualism that promoted independence but also sought personal connection without necessarily feeling reliant on other people. This indicated an appreciation for autonomy whilst not wanting to be isolated from those around them. Essentially suggesting an interdependent exchange between members of a society or community. The concept of community emerged from a comment made by one participant on the dynamics of interpersonal relationships. The individual indicated that she felt there had been inadequate opportunities for meaningful, shared interactions through which becoming familiar with other travellers and creating a sense of family, due to the fact that people were staying at the hostel just for a few days.

Three participants travelled solo with the intention of finding companionship, enjoying their freedom to make decisions and take on responsibilities independently, as well as using this time for self-reflection. They argued that, although they wanted company on their journeys, the main incentive was achieving freedom and independence in order to truly listen to themselves and make decisions without any external interference or influence from others. They had different reasons for wanting to take this journey by themselves. For one of them, the solitary experience also offered a chance for personal healing through introspection. It, therefore, enabled these travellers to cultivate responsibility further while enjoying unrestricted adventure along with exploring new places unaccompanied. The findings suggest that, although some participants opted to travel alone, they still expressed a desire to meet other people during their journey. Two of them deliberately made plans to join activities that would help them interact with others, such as enrolling in a language course or booking a group activity ahead. This indicates that forms of social engagement are a key factor in travelling, allowing travellers to form meaningful connections with other people and share their experiences.

This also relates to what was observed in the previous paragraph about the selective socialisation phenomenon. Due to Australia's reputation for backpacking experiences, it is not hard to find individuals who share similar interests as there are numerous ‘backpacker hubs’. While young travellers need freedom and autonomy to make life decisions on their own terms and follow their dreams or ambitions, they don’t want to isolate themselves without the support network that comes from relationships with others. For most young generations today, there is an understanding that independence does not mean having no connections. It means being able to build meaningful social networks while ultimately taking responsibility for one's choices. In conclusion, wanting independence doesn't necessarily equate to loneliness. Instead, it suggests strengthening personal bonds through communication so that both individuals remain autonomous yet interdependent at the same time, allowing greater development of community structures.

Three out of five participants took part in working experience on farms, in order to complete the required 88 days of farm employment. This aspect deserves attention since it is an extremely common path as well as a controversial topic regarding the Australian backpacking industry. Indeed, each of the three interviewees devoted a considerable amount of words and time speaking about their working experiences, which was evidently a firm memory in their minds.

A premise must be done first: interviewees showed an initial reluctance to talk negatively about their working experience. This is believed to be due to the fact that individuals usually retain good memories of the past and that disappointment tends to be avoided when talking about overall positive experiences.

What emerged from the interview was a two-sided coin. The participants yielded positive feedback related to their social environment with fellow travellers, connection with nature, and the unique setting.

However, positive sentiments decreased when analysing elements concerning the practical aspects, such as the amount of work, pay rates, safety and support. All three participants reported that problems began with searching for employment opportunities. Those were reported to be time and effort-consuming. The only sources available were Facebook groups and word of mouth. These methods lacked immediacy or assurance in their responses, leaving those seeking work stuck in an ongoing cycle of expectation, hope and disappointment. Once the job was found, the arrangement between parties was reached without formal communication or legal documents.

The journey to the farms was reported to be long as most of them were located in remote areas. This suggests that travellers with no private vehicle felt rather isolated and left to rely on the farm staff, as public transport was almost absent.

The accommodation was often provided under payment, and people had to rent rooms at the same location on the farm, in order to be able to work. The farm owner was often the same of the hostel. Rooms were reported to be full of people, suggesting an overcapacity. One interviewee also reported the presence of only one toilet to share with eight other people and without a lock at the door. This suggests that the standards of living offered were low, with no address for privacy, security and hygiene. Upon arrival, hardly any information was provided concerning the duties of the job. On her first day of work, one participant described a feeling of agitation due to the lack of information provided. She was simply informed what time she needed to be ready to start working, but not any other details about the employment situation were shared with her. She expressed her feelings of insecurity due to the lack of any further details. This suggests that the employer's availability of information and disposition towards employees wasn't present and the interaction wasn't considered respectful.

The next day, the participant got into a van with other employees to travel 40 minutes from the hostel to work in a tomato field. She was informed then on how exactly she needed to pick up the vegetables and that each bucket would have got her earn five dollars. When asked how many buckets she could collect daily, she explained it equates to approximately what needs to be handed over weekly for accommodation costs, revealing that she had difficulties in proceeding at a certain speed due to the external conditions and effort required. If compared with minimum wage standards in Australia, this would be considered exploitative. Another interviewee reported being involved in a job in which the pay rate was 50 cents for buckets of blueberries. It was noted that the buckets in question had considerable size and volume. This arrangement demonstrates an example where employers may pay exceedingly low wages for hard labour within agricultural industries.

The participant reported being exhausted after her first day of work due to the inconvenient body posture required and the extreme heat. She remembered to have been in tears and thinking of quitting immediately. It is evident here that the working conditions are not sustainable, but travellers have no choice but to complete their visa requirements. Indeed, she did not quit.

Working days were also not regular. Travellers would pay rent to stay at the accommodation; however, there was no guarantee that they may receive a call from the farmer every day. An announcement system was in place, involving daily postings on the main door detailing who had been called out to work. Those staying at such accommodations must be prepared for employment coming seemingly randomly so as to make the best use of the stay in that remote location. Obtaining regular wages when presented with such treatment was particularly challenging. In addition, the dependency condition created by this dynamic didn't allow participants for freedom during the weekdays.

The contracts, if present, were indeed casual. Among a variety of implications, emerged that no insurance or rights were provided for the workers. One interviewee recalled that she had incurred an injury while working, and when seeking assistance for her ailment, she got no assistance nor support from the supervisor. This statement indicated reluctance to provide aid or offer sympathy on behalf of the individual in need. The participant also referred to a passive-aggressive undertone by the farmer, expressing indifference towards the situation. In other words, no protections, safe

working conditions, regulations compliance or health coverage benefits were available for employees possibly injured during work hours.
Another participant felt quite lucky to have been hired for a job on a potato farm at a higher pay rate. Despite working twelve hours per day, she still appreciated the amount of money she earned by being paid hourly. It emerged from this last insight that also regulation on the maximum of daily hours was absent.

The complexity and richness of the feedback confirm a quite exploitative situation in terms of living and working conditions such as pay rates, timetable, treatment and assistance of any kind. It also transpired that these are commonly known conditions inside that environment. Participants showed a sentiment of acceptance towards those circumstances, as to suggest that that is the way things work and they had no choice but to adapt.
This also suggests that a likely saturation of the market allows farms to perform exploitative attitudes towards workers who are left with no choice but to accept these inhuman conditions of work.

The literature found on the topic aligns with the experiences reported by the interviewees. Sources suggest that the situation has remained largely static over time, indicating that little effort has been made on behalf of government organisations towards assisting those who travel to the country. The lack of momentum in this area implies a preference given to protecting and stimulating activity within primary industries, fostering a system made up to take advantage of young travellers' conditions.

6.5 Conclusions And Comparison With The Literature

In conclusion, the use of graphic representations has been preferred as a way to communicate ideas effectively. Graphic representations can facilitate quick understanding and provide an immediacy that is more direct than words. Utilising graphics allows important concepts or details to be highlighted more prominently, giving readers a direct view of key ideas much faster than reading the text would normally allow for. Furthermore, these visual aids have universally great appeal due to their ability to capture attention quickly, allowing primary information to take centre stage while helping filter out what could otherwise be seen as excessive detail presented in writing alone.

6.5.1 Generation Z's behaviours and attitudes towards travel

The following comparison is made between the results coming from the data analysis and the findings from the literature review concerning general behaviours and travelling attitudes of Gen Zers. The data mostly confirmed what was reported by other sources, while emphasising some specific aspects more than others.

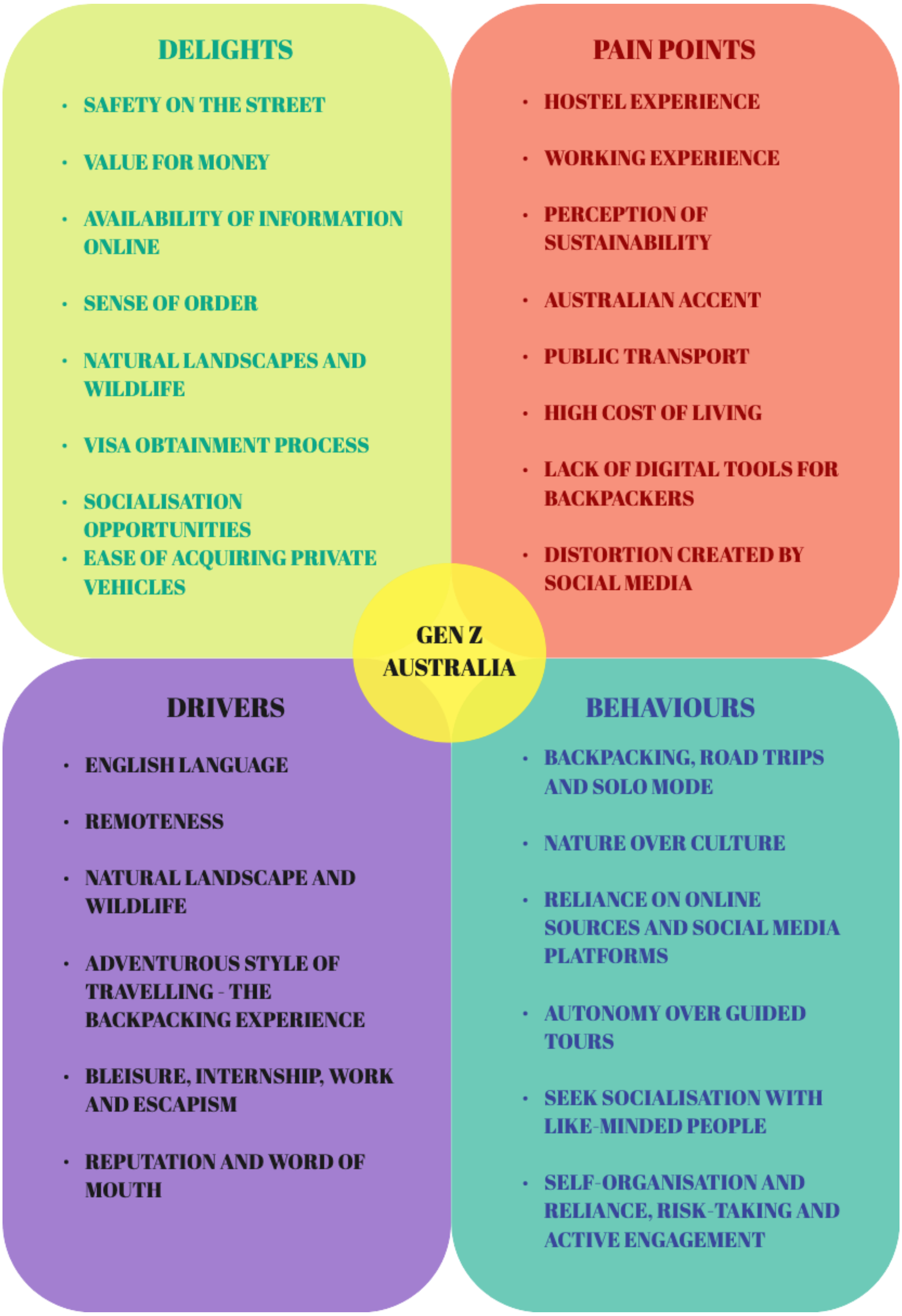
Figure 7: *Main findings from the comparison with the literature reviewed.*

Source: elaboration of the author.

6.5.2 The Australian experience

The following graphic representation reports the findings related to the specific investigation about the destination Australia. The main findings are here reported in subdivision into four categories.

***Figure 8**: Delights, pain points, drivers and behaviours of the participants.*



Source: elaboration of the author.

Chapter VII

CONCLUSIONS AND RECOMMENDATIONS

7.1 Introduction

Travelling has become a significant component of modern culture and Gen Zers are projected to be the most well-travelled segment ever. This thesis explored the realm of a generational cohort, which is believed to become the most influential generation on market decisions and product design in all economic sectors. The aim was to provide a tool for organisations to support their decision-making process and align their strategies with what Gen Zers truly desire and need.

Generation Z is a complex and varied generation, presenting common traits as well as differences among its participants. Understanding the behaviours and needs of the generation is fundamental for the future of the travel sector, as well as for the whole economy. Doing research into the generation's motivations and preferences provides valuable insight which can be best leveraged when creating products or services designed specifically for them and ultimately employed to anticipate trends.

Besides the review of existing studies and opinions, this thesis aimed to provide an alternative point of looking at young travellers. With travelling being a primary focus, the examination of the way Gen Zers perceive the world, as well as their interests and concerns, provided a significant comprehension of how their preferences may influence the travel industry in the future.

An empathetic framework was brought by the collection of primary data through semi-structured interviews. The specific methodology used to collect data allowed the gathering of detailed and complex information, which was then analysed and interpreted according to some of the typical methods employed by UX Research.

The innovative contribution of this research is in the utilisation of a methodology that allowed for an in-depth and updated examination of each person's distinctiveness. The intention being to draw out different perspectives and interpretations so as to increase understanding surrounding those interviewed. In other words, the main focus of this work was not just to learn about what people had to say, but also how they were saying it and why. The goal was to explore the individual differences between each person so as to gain a comprehensive understanding of them as a group. This was achieved by avoiding generalisation and keeping the data collection as open as possible.

This chapter reflects on the key findings in relation to the research questions. It provides a set of recommendations, highlighting their implications across existing knowledge and throughout the larger sector itself. Necessary steps toward reform based on these outcomes would help improve current practices while forecasting upcoming challenges or opportunities.

The researcher then explores any limitations that may have been present during the study before offering a general conclusion.

7.2 Research summary and reflections

Many studies have indisputably demonstrated that the contributions of younger travellers to the tourism sector should not be overlooked, but ought to be duly acknowledged.

Young people can be credited for expanding the popularity of destinations by discovering new locations, taking advantage of technological progress and cultivating a richer cultural comprehension, indicative of a greater understanding of their travels. Furthermore, this demographic has increasingly viewed travel as intrinsic to a quality life, effectively distinguishing it from a temporary escape from reality. Gen Zers can offer long-term value to a destination, as expressed by their prevalence of revisiting and contributing greater benefits to their chosen locations. The result is that this generation has presented new demands that will undeniably shape the direction of the sector in the coming years and cannot be overlooked.

The analysis of the literature and the findings from the data collection have affirmed that Generation Z exhibits a set of shared traits that should be taken into consideration when designing travel services. To remain competitive and desirable for young travellers, service providers need to comprehend these typical features and integrate them into their offerings.

7.2.1 Generation Z and travel

a. Travel is a lifestyle

Generation Z, having grown up in a period of unrivalled connectivity and ease of travel, has come to view travelling as a necessity and a right. They are eager to mix their everyday life with travel, pursuing a lifestyle on the move and taking any chances available to them to engage in a trip. Not being able to move during the pandemic restrictions deeply affected this generation, which also resulted more resilient to embracing travel as soon as allowed. They are also frequent travellers, preferring frequent get-away to one singular vacation. In fact, they don't perceive travelling as a holiday activity but rather as a lifestyle.

b. New trends: bleisure and digital nomads

The growing emergence of new trends made possible thanks to the evolution in technology has fostered this sentiment, allowing more and more young adults to keep pursuing their daily activities remotely. Working and studying independently of the location became more possible and widespread after the outbreak of COVID-19. Thanks to this imposed shift, Generation Z members have started to realise an alternative way of living in which travel is a constant element, expressing even a desire to switch jobs in order to increase their opportunities to travel.

The popularity of the term 'bleisure' is rapidly increasing in the hospitality sector. The shift to digital nomads who work from any location versus the traditional office space is becoming a predominant trend, forcing the hospitality industry to adapt in order to successfully draw in customers. As a consequence, the demand for flexible jobs and living spaces efficient for pursuing work, in attractive places that are cost-effective and provide good transport links is rapidly increasing. To meet this new demand, accommodation establishments may offer shorter rentals with office space and facilities, as well as hotels and hostels with dedicated working spaces. In turn, cities will need to adapt to the influx of young travellers, making the health of local communities and the liveability of neighbourhoods an even higher priority.

Notably, these new trends represent a great opportunity for secondary destinations, such as smaller towns and villages, to repopulate with people who are unable to afford major city life and prefer a slower way of life, in direct contact with the community.

c. The value of experiences

Members of Generation Z prioritise experiences when travelling. For this demographic, the sole idea of being in a place defined as a travel destination is not enough. They seek adventure and experiences that would make them feel alive, not without a touch of discomfort and thrill. They also value learning about different cultures and environments, being proactive in immersing themselves in the context they are living in. This generation desires the opportunity to venture beyond the resort and explore the destination in its entirety. In this sense, the influence of Gen Z can lead to a wider variety of travel options, and new ways of experiencing travel that had not been considered prior.

d. Openness and authenticity

The search for meaningful experiences and authenticity also contributes to this behaviour, showing a tendency towards slowing down in order to take the time to get to know how people live in those destinations. It follows that Gen Zers actively engaged in benefiting the host community and producing positive outcomes when travelling.

Destinations can attract Generation Z by utilising creative marketing strategies, yet they must guarantee that what they advertise is achievable, financially feasible and will bring sustainable benefits to their environment and the local population. Brands must include in their strategies common values, not just attractions. For instance, destinations can focus on supporting local producers and elevating their products, promoting ethical practices and proper working conditions in tourism establishments and adopting more ethnically inclusive promotional campaigns.

Generation Z has demonstrated to be the most open-minded demographic in regard to matters like race, complexion, sexual orientation and gender identity. This indicates that they may be drawn to locations that are renowned for their defence of liberal values and their shielding of minorities from discrimination, in addition to having greater tolerance for freedom of expression. Places that effectively communicate their progressive political stance via soft diplomacy can, thus, potentially gain the commitment of Gen Z travellers in the years ahead. This also underscores the importance of delivering Gen Z visitors with the utmost experience while they are in the destination, so that they can ultimately become loyal ambassadors for the destination.

e. Environmental sustainability

It is apparent that Generation Z has a higher inclination towards environmental consciousness surpassing prior generations and this is manifested in its travel habits. Opting for natural, sustainable materials with animal welfare in mind has become an appealing aspect. This can be attributed to the information they have been compulsorily exposed to concerning global warming and eco-friendliness throughout the course of their lives. Gen Z is passionate about engaging in ecologically responsible trips, as well as practices that promote sustainability while providing assistance to communities they visit.

As a result, people of older generations may observe that certain amenities they once deemed standard in their guestrooms are likely to be withdrawn in the name of sustainability, such as daily replenished bath products which will be replaced by large, mounted products that could last through multiple guests stays. Similarly, one might come to observe the absence of certain hotel staples, such as bottled water and potential automation for lighting systems that turn off when no movement is detected in a room for a prolonged period. Adopting mechanisms such as a remote check-in/out procedure to reduce paper waste, reusable bottles and water refilling stations in lobbies, and partnerships with e-bike and rideshare services constitute no-brainers towards appealing to this generation. More technologically advanced amenities, such as solar panels, smart thermostats, and heat pumps for carbon-emission reduction, could further amplify their positive preferences for potential lodgers. Consequently, the impetus behind this demographic’s inclination to the aforementioned measures comparatively rests on their preferential perceptions.

f. Use of technology

Generation Z's affinity for technology makes them well-equipped to quickly and adeptly adapt to advances in travel technologies. Utilising mobile boarding passes, resolving booking issues through social media platforms, or having recourse to live chat and other efficient means to reserve their trips or obtain support, will rapidly become the norm when travelling.

Tourism businesses necessitate to adapt and improve their online presence and mobile applications in order to remain searchable within mobile devices and web platforms. The use of Artificial Intelligence (AI) in the form of chatbots and smart speakers is already being employed to fulfil the needs of travellers and is expected to further expand. Generation Z, in particular, is increasingly expecting its needs to be promptly addressed through instant messaging services. Thus providing a multilingual chatbot could be a viable approach to ensure an immediate response to queries. High-quality personal service with a warm touch may become even more valued when it comes to travel.

Virtual tours and other travel conveniences enabled by technology are also expected to continue to proliferate in the foreseeable future. Cities are likely to team up with mobile operating systems to facilitate augmented visits, and develop high-quality virtual reality tours which will give travellers a greater understanding of their destination before they arrive, thus aiding in their trip planning. This will also allow cities to gain deeper insight into who is coming and what they are searching for, while virtual tours and more frequent use of Google Streetview-type services will mean that Gen Zers can arrive at their destination with a better understanding of it, and will be able to orient themselves with more ease.

g. Information availability and self-organisation

The habitual practice of arranging travel plans right away has also contributed to heightened expectations among Gen Zers, such as the demand for more customised services and the likelihood of altering or enhancing their plans on short notice.
The large availability of information online and the reliance on OTAs have allowed young travellers to plan their trips with autonomy and greater personalisation and flexibility. Thanks to technological enhancements, they are informed travellers and often engage in in-depth research and compare multiple reviews. They are also inclined to extensively investigate products before purchasing under many aspects that include not only price and quality but also the image and values of the provider.

Moreover, the prevalence of technological and social media usage amongst Generation Z means that they have access to travel information that may not have been available to older generations, which could enable them to give advice and tips on travelling, thus influencing their needs and wants as well.

h. The quest for deals

Having free access to information and being able to compare multiple options at a time, also makes it possible for young travellers to pursue the best deal. Being defined as price-conscious, Gen Zers are actually interested in gaining adequate value for the money spent, not necessarily purchasing the cheapest option. In this perspective, organisations within the industry must develop personalised plans and offer discounts or deals with multiple services to provide a sense of greater valuable outputs. The key in this sense is giving the traveller the perception that the product, whatever is the price, is worthy.

i. Role of social media

Social media is another principal source of information and inspiration, considered more effective and subtle than traditional research on the web. Influencers play a substantial role in driving travellers' preferences, particularly through the power of aesthetically appealing visuals, and easy-to-consume content such as photos or videos. The proliferation of social media and its capacity to broadcast all facets of a journey in real-time has created an impetus to seek out unique destinations and perform activities that have not been widely shared by others. The combination of consistent connectivity, along with the constant cultural and travel stimulation presented on social media, has served to broaden the ambitions of Gen Z outside of the traditional touristic arena. Generation Z travellers have definitely become more demanding. They prioritise being the first to travel to particular locations and have a tendency to seek out and appreciate unique experiences which can then be shared on social media accounts. Gen Zers are drawn to particular locations based on how they believe the experience will make them feel, how close they can get to the core of the action, and how genuine the destination appears to be.

It is clear that in order to engage the Gen Z demographic, the content must be captivating and immersive. Rather than simply listing the primary attractions of a destination, it is necessary to employ persuasive storytelling to motivate these individuals to visit. To be effective, the narrative should demonstrate how the experience will make them feel, what they will encounter in terms of sight, sound and flavour, and why that stands out from the crowd.

j. Brand loyalty and empathy

The development of empathy and a stronger connection with Gen Zers are essential to ensure a successful engagement. This is integral to consider how the destination's strategy can be shaped to align with the values and interests of this demographic, such as climate change, health and wellbeing and personal identity. The capacity to empathise with their audience can lead to an emotional bond between the brands and their customers, thereby creating the perception of greater loyalty. This connection is particularly important in industries such as travel where customers may form strong attachments to certain services or companies. As a result of this attachment, customers start viewing the brands more favourably than just as sources for purchases. Brands should also facilitate creative opportunities for Gen Zers to engage with their brand and empower them to be part of the brand experience, enabling them to leave their mark in a meaningful way. By creating conversations and opening authentic channels for collaboration, brands can create connections with Gen Zers and gain reciprocal advantages.

The emphasis on community as well helps create relationships between companies and their customers, based around similar principles. Special offers tailored to their lifestyles, greater transparency into corporate decision-making processes through crowdsourcing campaigns or emphasizing brand loyalty via rewards programs, are just some methods used in harnessing this newfound focus on collective experimentation across multiple industries, in order to meet consumer needs more effectively than traditional approaches could provide.

k. Autonomy and togetherness

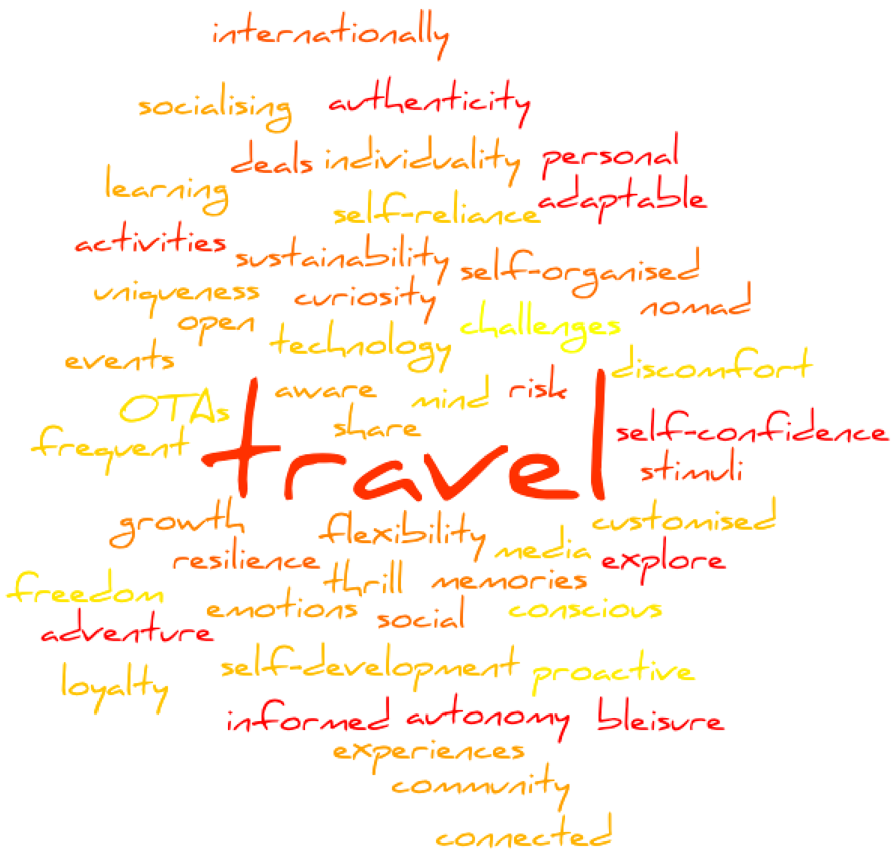
Young people today have a strong commitment to the value of diversity, independent decision-making, and the significance of having a distinct, fascinating character. As customers, they are complex to satisfy due to their divergence of travel aspirations: on one hand, they have a propensity to be by themselves, retreating from their hectic lifestyles, while on the other hand, they also crave contact with their peers and remain digitally connected while on vacation. Generation Z members are conscious individuals. They are aware of themselves as well as the environment and the implications that actions have on others. They seek meaningful connections with both themselves and those around them in order to cultivate positive outcomes collectively. They value self-development and personal growth and search for chances to build self-assurance and interpersonal relationships by engaging with unfamiliar people in novel settings.

Building social connections with like-minded individuals is fundamental. Increasingly dealing with anxiety and fears about themselves and the world, young travellers see travel as a valuable opportunity for respite, as well as a chance to cultivate self-confidence and respect from others. In order to ensure that Gen Zers feel socially at ease in their destination, service providers need to create a safe and welcoming environment. Such an environment should not only enable Gen Zers to engage with the product, but also foster an atmosphere in which they can interact with one another. Offering the opportunity to develop such soft skills should be a must for service providers, which could focus on the psychological aspects of their services and enhance them with attention to detail.

I. Privacy and big data

Members of Generation Z seem to hold a wide variety of apprehensions regarding their privacy and online presence, as well as the utilisation of their data. The issue of trust is also pertinent when considering Gen Zers and the brands they engage with. Arising in the era of fake news and misinformation, Gen Zers prioritise trust and authenticity, expecting businesses to esteem their opinions and beliefs in return. Generation Z also prioritises transparency when it comes to pricing and terms and conditions. Lack of clarity can be quickly identified and criticised on social media, potentially leading to a negative reputation that is hard to repair. It is essential to inform Generation Z regarding how their personal data is being used, who has access to it, and how long it will be used.

Figure 9*: word cloud of Gen Z travel experience*



Source: elaboration of the researcher

7.2.2 Implications for Australia

As far as Australia is concerned, all of the characteristics explored above are valuable insights. Nevertheless, thanks to specific information gained by the collection of data on the direct experience of young travellers to the country, it will be possible, in this paragraph, to dive deeper into rooms for improving the travelling experience of Gen Zers in Australia, referring in particular to those who engage in backpacking experiences.

Every year young travellers choose to engage in an adventurous journey to Australia pursuing a sense of discovery and challenge. The main drivers are the natural resources of which the country is rich and that suggests that the optimal way to conduct the journey is by backpacking, in order to be able to move around fastly and flexibly.

The country is depicted as an ideal destination but a deeper look actually reveals the many shortcomings and contradictions within the management of the travel industry. In fact, if the overall journey experience for other travellers is exceptional, when it comes to backpackers, it appears that Australia still follows certain practices which are not ideal to cater for the needs of young visitors.

Although Australia retains the positive reputation of a dream country, thanks to breathtaking landscapes and incredible wildlife, there is a need for improvement in many aspects of the travel experience that the sector offer today. Major pain points reported by the analysis of the interviews were related in particular to the quality of tourism services, while elements of common presence in the society were appreciated. This suggests that, although Australia may have optimal conditions of living as a country, when it comes to young visitors on the road, they are disregarded and not served properly, suggesting faults within tourism-related services in the backpacking sector.

Among the literature review and as reported by the data collected during the interviews, the working experience is the most critical aspect. Rooms for improvement must occur in the legislation system as well as in the enforcement of protection and support of younger travellers employed by a system which is often defined as exploitative. On the other hand, travel service providers also play an important role in delivering high standards services such as accommodation, transportation and experiences, also offering better value.

Further pain points include the absence of digital tools that enable travellers to collaborate and divide their expenses during road trips, the inflated cost of vans due to their scarcity, and the insufficient information about job opportunities on farms as well as an organised system of connecting with potential employers. In this context, many are the opportunities for improvement. One example could be the development of a mobile app that would facilitate exchanges among peers and gather all the information available on job opportunities, creating as well a channel for communication with employers.

7.3 Limitations of the study and final reflections

The collection of data used in this study followed exploratory purposes. The implications are that the data collected are likely to be used for creating hypotheses and conducting further research. Exploratory data are not meant to be used to draw concrete conclusions or as a source of definitive answers, but rather as a starting point for experimentation or further investigation.

Although the methods are pivotal to understanding the tourist experience, the challenge of measuring or quantifying personal experiences remains. Narrative variables such as memories, perception of quality and satisfaction are quite subjective to the single individual. One example of this has been individuated in the participants' tendency to give diplomatic or socially acceptable responses to questions and modify their behaviour due to the awareness of being observed.

The semi-guided structure of the interviews served to maintain a common path of development, but inevitably brought to varying quantity and quality of information. However, being this the purpose of such a method, more standardised results would come from stricter structures.

Time availability as well was a constraint, as the interviews lasted between 45 and 60 minutes, but could have lasted for hours given the richness of the participants' experience, not only in terms of words but also regarding less explicit information.

The restricted number of participants is not representative of the cohort as a whole, with that not being the main focus of the collection, we must recognise that further exploration and data collection is needed.

The interpretation of the results, as well, has the potential to dive even further into the information gathered. The data represent exceptional insights open to interpretations in terms of behavioural psychology, linguistic analysis and observation of body language. However possible, this exploration was not fully carried out in the present thesis.

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Appendix 1

INTERVIEW SCRIPT

- Thank the participant for their time and effort
- Introduction of yourself, the overall project, the goal of the interview and what to expect (5 mins)
- *Do you have any questions before we start?*

Introduction of participant

- *Can you tell me a little bit about yourself?*
- *How would you describe yourself as a person?*

General high-level questions

- *How do you feel about travelling?*
- *What are you travel habits?*
- *What does your typical trip look like? I would like you to walk me through the process of you going on a trip*
- *How do you usually organise your trips?*
- *What are your priorities, goals, expectations? Would you rank the things you just listed in order of importance?*
- *What do you search for when travelling?*
- *What are your biggest motivators/why is it important to you?*
- *<u>How often</u> do you travel?*
- *What do you do? Which kind of activities you engage in?*
- *What are the challenges do you usually encounter when travelling?*

- *How have your travel experiences shaped you as a person?*

Can you give some general information about your travel to Australia?

Pre-trip experience

- *Is/was it your first time in Australia?*
- *Can you tell me about your decision to come to Australia? [How the idea first came to your mind? Why did you make that choice? What factors/people influenced you decision? Motivations, expectations, goals] Did you have any fears or doubts about your trip before leaving?*
- *How was your experience when searching information about travelling to Australia? [Which were your primary sources of information?*
- *In relation to the overall process of searching, planning and booking, did you feel the <u>information</u> available were enough?*
- *Can you walk me through your process of planning the trip to Australia?*
- *How much <u>time</u> did you spend on planning?*
- *Did you booked any services <u>in advance</u>?*
- *Did you feel supported by the <u>tools</u> available online?*
- *Did you encounter any <u>challenges</u> when planning/booking your trip?*
- *If applicable, what type of VISA did you apply for? How do you feel about the process of obtaining the VISA?*

In-trip

[follow up questions: *Did you encounter any challenges in relation to ... ? How did this challenge/s impact your trip? What did you like and dislike about ... ?]*

- *How was your experience once arrived at the destination?*
- *How was your experience with accommodations?*

- *Did you encounter any challenges in relation to the place you stayed in? How did this challenge/s impact your trip?*
- *Can you walk me through your working experience?*
- *How did you feel about the social environment you were in contact with?*
- *Did you feel supported in any sense if and when you needed help?*
- *How did you feel about safety during your trip? Did you feel safe and secure?*
- *Did this impact your trip? How?*
- *Can you walk through your experience with the services available?*
- *Did you use/buy any service on site? How did you buy those services? Was it easy to do that?*
- *What's your thought about those services? How did you find the services available?*
- *Did you engage in any activity? What kind of activities?*
- *Do you remember any particular experience you had? Why?*
- *How did you feel about the activities available in place?*
- *How did you feel about your communication during your interaction experience?*
- *Can you tell me about how you were going around?*
- *In relation to your travelling experience, how do you feel about costs and prices? How this impacted your trip?*
- *In relation to the various aspects of your trip, how did you feel about sustainability?*
- *What are your thoughts on the facilities available?*
- *Have you used any tech tool in any of the phase of your journey? Are there any ways these products do not support your current needs? Is there anything you wish you could do with these products which is currently not possible?*
- *What were your goals/expectations? Where they satisfied?*
- *What are your thoughts on food?*
- *You presented a pretty positive experience of your travel to Australia. Do you remember if you encountered any challenge and what happened?*

[EXTRA TIME QUESTIONS]

- *Did you have any cultural experiences with Indigenous Australian's ? Did you learn anything about their culture or history?*
- *Would you come back for another experience?*

Blue sky closing

- *If you were to come to Australia again, would you look for alternative solutions to what you experienced?*
- *Is there anything you wish you could have done which was not possible at the time of your trip?*
- *If the sky was the limit, what would you want?*
- *What are your travelling plans for the future?*
- *Is there anything you would like to tell us that we haven't asked you today?*