Generation Z (aged 13-22) - Customers and their expectations

#1 GENERATIONS, LEISURE AND TOURISM

The tourism and leisure markets need to constantly adapt to customers' consumer patterns. They must simultaneously satisfy **several generations of consumers**, each of which have their own expectations and a different way of viewing leisure and tourism.

BEHAVIOUR IS MORE IMPORTANT THAN AGE

A generation is defined by **similarity in the behaviour** of the individuals in it. Ways of being and of doing resulting from multiple factors such as access to technologies, changing values and shared lived experience leave an important mark on members of the same generation.

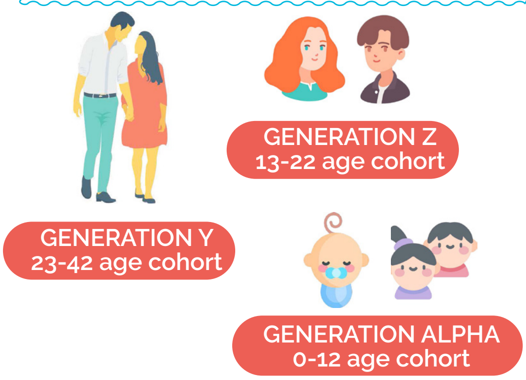
CHILDREN, TEENAGERS, YOUNG ADULTS AND FAMILIES

After baby-boomers, the most analysed generation in terms of tourism patterns, and generation X (aged 43-59) currently the majority of customers.
What are the behaviour patterns of new and future customers?
What are their expectations?

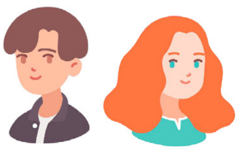
The purpose of this new collection is to give you some answers

KNOW YOUR CUSTOMER TO SERVE THEM BETTER

Understanding the behaviour and expectations of individuals in a generation and understanding the values that set them apart from others means that you can also devise offerings specifically for them and accommodate them physically or virtually.



#2 WHO ARE GENERATION Z?



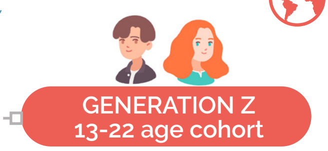
WHAT AGE ARE THEY?

Born between 2000 and 2009: the oldest are aged 22, the youngest 13

HOW MANY?

8 million in France

32% of the global population



KEY EVENTS

- European economic crisis and China's emergence as a superpower
- "Mass" unemployment
- Smartphones, 4G, social media, TikTok (2018)
- Terrorism and attacks in France (2015)
- Importance of ecology (the Greta Thunberg generation)
- Sharing economy
- COVID-19 health crisis (2020) affected education and studies

FEATURES TO TAKE INTO CONSIDERATION

Young customers, difficult to retain: 80% will drop their favourite brand if they find a similar product of better quality

Hyper-connected, the internet is their main sourc of information: 91% use the web to plan their Check their smartphone at least 5 times an hour.

More politically engaged and active than pre generations: particularly in terms of environmental responsibility and social challenges

Ambitious: 60% want to make the world a better place and 72% want to start their own business

both more materialistic 60% choose a physical product over a momentary sensation;
for meaning: 71% prefer to have a lower-paid job if is more meaningful.

Sources: Agence Signe des Temps - Côtes d'Armor Destination

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#3 EXPECTATIONS OF GENERATION Z IN TERMS OF LEISURE AND CULTURE

GENERATION Z
13-22 age cohort

EXPECTATIONS

1. **Learn while having fun**: the two are not incompatible when it comes to appealing to this generation. Visuals, videos, games and challenges are all useful fun media.
2. **A more active than passive experience**, particularly for cultural venues such as museums, which need to reinvent themselves as **creative and living spaces.**
3. **Attractive visuals for sharing their experience on networks**: instagrammable activities are popular (L'Atelier des Lumières, Museum of Ice Cream, Smile Safari, etc.). Over 215 million Instagram photos posted on **#art**.
4. **Tailored activities relating to their centres of interest**: working with artists, cookery courses, urban dance, make-up, graffiti, bushcraft, etc. **New trends to monitor**
5. **Compared to children, teenagers** look for more **freedom and autonomy** from their parents

FEATURES TO TAKE INTO CONSIDERATION (CTD.)

- **Less adaptable:** attention span of 8 seconds compared to 12 seconds for generation Y
- **They come from families that like to travel**: take almost 3 trips a year and more than 70% stay in their own country
- **A self-taught generation that questions conventional schooling models**: 90% think the best education comes from real experiences
- **A more collaborative generation**: the sharing economy is more anchored in their habits. Use online exchange and resale platforms (Vinted, Leboncoin), vehicle-sharing platforms (Blablacar, bike-sharing schemes, etc.)

#4 THEIR CENTRES OF INTEREST

GENERATION Z
13-22 age cohort

ART, CRAFTS AND HOBBIES

1. 46% Express their creativity by **taking photos**
2. 40% Use **music**
3. 31% Keep **a personal diary**
4. 29% **Draw or paint**
5. 27% Are interested in **make-up art**

SOCIAL MEDIA

Over 50% of generation Z create their own content on social media

FAVOURED PLATFORMS:

- 84% **Instagram**
- 76% **Snapchat**
- 52% **TikTok**

WELL-BEING AND MENTAL HEALTH

57% Engage in physical and sporting activity
76% use a connected device when playing sport and 48% use dedicated content on Instagram

33% **Engage in well-being activities:** meditation, personal development, etc.

ECOLOGY AND ADVOCACY

52% of instagrammers aged 13-24 ans **followed a social advocacy charity** in 2021

37% **Intend to donate to a charity** in 2022

VIDEO GAMES

87% **Play video games daily** or weekly

40% Expect **more video game trends** in 2022

Sources: Diplomeo & le Blog du Modérateur, Instagram Trend Report 2022, Think With Google, DeloitteBlog du Modérateur, Instagram Trend Report 2022, Think With Google, Deloitte LSA

#5 WHERE DO THEY GET THEIR INFORMATION? WHAT ARE THEIR INFLUENCES?

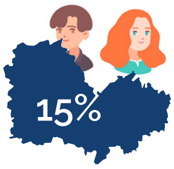
GENERATION Z
13-22 age cohort

1. **Social media:** 65% use them for news. Primary source of information for 39%, ahead of online journals and blogs (26%). 96% use live-streaming platforms (TikTok, Twitch, Instagram Live, etc.)
2. **For 15%, their classmates, friends and entourage** remain their primary source of information.
3. **YouTube:** 85% watch videos Most watch YouTube more than TV. Video blogging is seen as an attractive job, 37% dream of building a career on YouTube.
4. **Influencers** have more impact on this generation (29%) than on generation Y (19%). For 4 out of 5 young people, creators of content on social media have more impact on culture than traditional celebrities (actors, etc.)
5. **They have huge influence on family choices:** 87% of parents say children influence purchasing decisions (2019)

#6 GENERATION Z IN CÔTES D'ARMOR – SOME STATISTICS

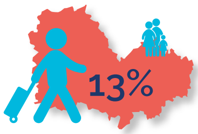
SHARE OF POPULATION IN CÔTES D'ARMOR

Young people aged 11-24 make up **15% of the population in Côtes d'Armor[1] i.e. about 88,000 young people**



PROPORTION IN REGIONAL TOURISM

Generation Z make up about **13% of tourists staying in Côtes d'Armor[2] i.e. about 450,000 young tourists a year**



Families with children	Indicators
Group size	4.7 people
Length of stay	9 nights
Spending per day per person	€35
Holiday budget	€1,315

Coming up in 2023
Data update with REFLET 2022

[1] Source: INSEE population census - 2019
[2] Source: REFLET survey 2016 - Brittany Tourist Board

GENERATION Z IN CÔTES D'ARMOR

Up to the age of 19, 86% live with their parents, most of whom are still working (75%). Most live in urban areas (Saint-Brieuc, Dinan, Lamballe, Lannion, etc.) in the north.

46% of the 20-24 cohort still live with their parents. They are in higher education or working. 20% live alone and 25% with a partner.

GENERATION Z FOR TOURISTS

Most are from the greater Paris region (27%), followed by Brittany (12%) and stay for about 9 days. First came here in summer with their parents or friends, renting or camping.

More than 1.2 million tourists a year are families with young people aged 11-24

16% of families with young people go cycling, visit museums and/or exhibitions during their holiday. More than 10% do water sports or visit leisure parks.

#7 NEW PRESENTATIONS IN 2023

PROVISIONAL SCHEDULE 2023: PRESENTATION ON TOURISM AND LEISURE CUSTOMERS

March/April — Presentation on **Generation Alpha, Z and Y** based on analysis by Agence Signe des Temps

May — Experience analysis **in Côtes d'Armor based on online customer posts** by season and type of service - TRAVELSAT

June/December — **Tourism customers and day trippers by profile in Côtes d'Armor**
Results of the new REFLET 2022 study - Brittany Tourist Board

The information in this document is mainly based on an analysis by Signe des Temps on behalf of Côtes d'Armor Destination


Château de la Hunaudaye - L'Oeil de Paco - CAD22

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OVER TO YOU! WHAT CAN YOU DO TO ATTRACT AND RETAIN THESE CUSTOMERS?

SEE CÔTES D'ARMOR DESTINATION FOR CASE STUDIES

- Key tourism trends and figures
- Accommodation and leisure activities
- Tourist and day tripper flows - Orange Flux Vision data analytics
- Regional monitoring centres

Côtes d'Armor Destination:
www.cad22.com

studies on tourism
www.armorstat.com

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CÔTES D'ARMOR DESTINATION

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