What are the gaps in perception between European tour operators' perceived ideas of the Millennial Generation versus the Millennial traveller's actual expectations, demands and desires in regards to travelling in Europe, and how can a better understanding of these gaps help European tour operators capture this new and important market?

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PART I: INTRODUCTION

Loosely defined as those born between 1980 to 2000, the Millennial Generation (also called and referred to as Generation Y) is one of the largest and most important age groups throughout the world. In America alone, the Millennials represent one third of the US population, and the largest generation (even more so than the famous Baby Boomers). Some estimates predict that by 2020, they will represent half of the global workforce, according to survey, 'Delighting Baby Boomers and Millennials' (Beauchamp).

As this group of consumers are only just now starting to work, earn and spend money, get married and start their own family - and subsequently, travel - this is still a relatively young field of research. There have been many recent studies looking at the Millennial generation as a whole, with most studies taking a very broad overview of this generation. However, very few studies have gone in depth into specific aspects of Millennials as consumers, especially in the field of tourism.

Tourism, often overlooked as an economic element, plays an important role on a global scale. According to the World Travel and Tourism Council's (WTTC) report, 'Travel and Tourism World Economic Impact 2015,' travel and tourism resulted globally in $7.6 trillion USD, 227 million jobs (or 1 in 11) for the 2014 global economy – and these numbers continue to increase every year as more people travel farther, longer and more frequently. In the same year, the report claims international arrivals reached 1.14 billion, and even visitors from emerging or developing markets increased by 8% since 2000 (from 38% to 46%). The report states as well, that the direct contribution to GDP was 3.1% while the total (direct and indirect) contribution to the world GDP was 9.8% (WTTC, Turner). And this is all without touching upon the domestic market, which is an important market in many countries.

Because this area of research is new, there are, not surprisingly, many misunderstandings about this group of consumers. Travel industry professionals perceive certain things about Millennial travellers due to these misunderstandings or gaps in knowledge. Therefore, it is important to note what this group holds as expectations when travelling for travel industry professionals to be able to market and attract this generation efficiently. It is important to understand the gaps in perception of what travel professionals *think* Millennials desire and expect while on holiday as to what Millennials *actually* desire or expect while on holiday for the travel industry to attract and capture this generation.

Some experts also say that Millennials have significant wanderlust, with 71% who want and expect to do an overseas assignment as part of their career (PWC, Rendell). Even before cash bonuses, Millennials place an enormous importance on a good work/personal life balance, as they are committed to their personal learning and development. Many do so via travel: they account for 20% of today's tourists and their numbers are expected to swell in upcoming years. Accounting for 217 million international trips in 2013, this number is expected to rise dramatically – some experts estimating as much as 320 million trips in 2020, according to the World Youth Student and Educational Travel Convention (WYSE).

Therefore, as a professional in the tourism industry, it is clear that it is impossible to ignore this generation of people. Not only are they the "next" (and sometimes the "current") generation of clients, they travel more than their counterparts. According to a survey by HVS Global Hospitality Services, they travel on average 4.2 times per year compared to 2.9 for Baby Boomers and 3.2 times per year for Generation X. 58% prefer travelling with friends, which is 20% higher than older generation groups. But the question arises, how do professionals of the tourism industry capture this market? What are the differences between the Millennial Generation and former generations? How will they temporarily and/or permanently change the global tourism market? What changes will tourism professionals need to (or be forced to) make to thanks to the Millennial Generation?

It is only by understanding this complex and unique generation that tourism professionals will be able to capture this rich market. In this paper, I will seek to define what makes Millennials different from their older counterparts. I will identify the expectations of Generation Y, what their needs are, and how these needs are different from other generations. Then I will seek to explain how tourism professionals – with a concentration on European tour operators – can attempt to meet Millennial customer expectations.

In this paper, I will define and explain the main changes in lifestyle choices preferred by this generation, touching on timing and perception/memory (tangible v. intangible needs as well as preference of experience over physical souvenirs). Social media is an important part of Gen Y's lifestyle, and especially important for tourism. Therefore, I will explore such items as the "Fear of Missing Out," the need for "15 Minutes of Fame" on the Internet, Internet "validation" of lifestyle choices, the importance of virtual reality and how this pertains to businesses, not to mention the Gen Y reliance on technology. I will explore why the Millennials travel more, their travel motivations (push and pull), and what this means for the tourism industry. I will also discuss the importance of the word "authenticity" to the Millennial Generation.

I will focus entirely on European tour operators, though Millennials from all countries can and will be interviewed, surveyed and analysed, as any nationality can (and do) become a client of a European tour operator. Most importantly, I will examine the gaps in the current European tourism market and determine the best way to fill these gaps. One primary solution is the development of the responsible and adventure tourism markets. I will look at why this segment is a good response to the tourism industry and their new Millennial clients. I will determine how businesses in the travel arena such as tour operators, tourism boards, accommodations and travel advisors as well as other industry professionals can work to re-position themselves in the adventure travel segment in order to meet the needs of the Millennial Generation.

Continuing with gaps, I will also study the gaps in *perception* of who and what the Millennial market is. I hypothesise that there are sizable gaps in what the tourism – and more specifically the European adventure and responsible travel – industry perceives are the needs of the Millennial Generation, versus the *actual* needs, demands and expectations of the Millennial generation when it comes to tourism. I hypothesise that European travel industry professionals are responding to a false – or exaggerated – vision of the Millennial Traveller, and therefore missing out on capturing this important and lucrative market. Hypothesised gaps include: age assumptions, technological needs, budget size and willingness to spend, preferred travel destinations, desired length of stay, preferred modes of transportation and accommodation, willingness to use a tour operator or guide, importance of authenticity, travel companions, amount of experiential travel, and changing forms of business travel.

These gaps are very important to research and understand, since there are many misconceptions both specifically about Millennials and about 'young' travellers in general. Many business owners tend to apply the same conceptions created by older generations of 'youth' travel, assuming that today's 'young' travellers will have the same needs and desires as the 'young' travellers of Generation X, the Baby Boomers or the Silent Generation. However, it is clear that Millennials – for the purposes of this paper, those born between 1980 and 2000 – have very different life, consumer, and travel preferences than that of previous generations, even at the same age. If the current travel industry does not adapt, they will miss out on capturing this beneficial market – of which, Europe and products sold by European travel professionals plays a significant role. And because the Millennials are relatively young, they will start to form the primary base of consumers, as they are only now entering their top spending years (Lee, HVS Global Hospitality Services).

Therefore, I will investigate the effects of these changes, and their related effects on the European travel industry. Touching on that, I will study the current and future changes in practices by tourism professionals, new marketing strategies used to capture this market and changes in "tour packages" marketed towards Generation Y. Also important is the rise in alternative types of travel – notably, adventure travel and related fields such as eco-travel, agro-travel, responsible travel, 'volontourism' and working holidays. Innovations in products, sales and technological developments will also be important factors discussed.

In conclusion, I believe that the following study will report some significant gaps in the perceptions between the consumers (the Millennial travellers) and the producers (the European travel industry – notably, tour operators focusing on adventure travel in Europe). I hope that the shortened and edited publication of this study in the newsletter, AdventureTravelNews (published by the Adventure Travel Trade Association) will educate many travel professionals and inspire them to make some changes in the way that they attract, target and treat current and future Millennial consumers.

PART II: LITERATURE REVIEW

The Millennial Generation is generally defined as individuals born between the years 1980 - 2000. As a *nota bene*, some authorities use slightly different years, but the vast majority define the Millennial Generation as births between 1980 – 2000, which are the numbers used for the purposes of this study. Also called Generation Y or the dot.com generation, the name 'Millennial' is most used. As a businessperson today, it is impossible to ignore this generation and the changes they have brought on. As a tourism industry professional, it is even more difficult to ignore them, as they are changing the very definition of travel. The number of international travellers in general has grown dramatically, reaching over 1 billion for the first time in 2012, according to UNWTO's estimates, accounting for at least 20% of international arrivals since the turn of the century and this is likely to approach 25% before long. (Chapman, WYSE). In fact, the number of international millennial trips is expected to nearly double to reach about 300 million trips per year by 2020 (Canadian Tourism Commission [CTC], 2013). Their sheer numbers are staggering. They are beginning to outpace the Baby-boomers – who, at last count, numbered 76 million in the USA – with the Millennials own staggering 79 million Americans – and they are projected to continue growing, attaining even higher population gaps in upcoming years. (Lee, HVS). Lee also reminds us that the older end of the spectrum is already entering their peak travel-spending years.

It is important to understand these young travellers if businesses wish to attract them as clients – and indeed, it would be unwise to ignore such a large and important group. There has already been substantial research in the so-called 'Millennial trend.' As the CTC reminds us, Millennial travel is no longer regarded as a niche market but in fact, as a catalyst for future growth in the industry. In other words, they are here to stay, so to speak, meaning the travel industry must be prepared to adapt to their needs and demands because it is likely that much of the change they are instigating will become the norm in coming years. So, in the following pages, I will attempt to explain just who the Millennials are as explored in several studies, trends reports and articles done on the subject.

A. Experiences v. Souvenirs

Older generations generally have a predilection for things, tangible items that can be bought and sold, packed up and taken home with them, stored on a box, displayed on a shelf, hung on a wall, put in the garden.

To really understand this generation, one must go back and summarize the last couple generations. Starting with the Silent Generation (i.e. those who survived the Great Depression, born 1928-1945), their attachment to physical objects is most likely because 'things' were scarce during their childhood, and they were taught to cherish their belongings they managed to acquire (Pew Research Center [PRC], 2010). Much of this was passed on to their children, the Baby-boomers, which was the generation born just after WWII, 1946-1964. While this generation in the US grew up during a great economic boom, much of Europe was under a period of reconstruction, and recovering lost heritage as direct result of the war. They would also be taught to place great significance on whatever managed to survive the war, and taught the importance of material items (PRC, 2010). Generation X (born 1965-1980) was a transitional generation, which saw the birth of the Internet and the rapid technological developments from 1975 to the early 21st century, and are generally regarded as savvy entrepreneurs. Yet, Generation Y barely remembers a time when technology – and the intangible – was not an important part of our lives. Therefore, from an early age, this generation was taught the importance that intangible items could hold great value.

According to a 2014 survey by AMEX, 72% of Gen Y travellers prefer to spend their money on experiences rather than objects, and 34% marked 'cultural immersion' as their number one motivator when planning a trip abroad (AMEX, 2014). These two figures are direct examples that show that even Millennials themselves understand that experiential travel and cultural immersion (and within, rubbing shoulders with locals), are highly important to them.

Therefore, perhaps it is for this reason that Gen Y puts great importance on intangible things. For this reason, when it comes to travel, Gen Y actually puts *more* emphasis on experiences rather than physical souvenirs. They seek social and experiential travel activities and experiences that will lead to personal growth (CTC, 2013). A great experience that becomes a great story about visiting the kitchen and meeting the chef in a Parisian restaurant means more to this group than a shiny Eiffel Tower placed on their shelf. At Zerve, an innovative US ticketing platform for trips, they "encourage their partners to build in opportunities for Millennials to make their mark on the experience," (Plaeger-McCollum, 2015). Zerve goes on to provide certain examples of this 'experiential travel' (in this case, on a cruise ship): "photos with fun crew members, funny photo opportunities with staged scenes, or creative ways to make their mark, provide a way for Millennial guests to feel like they're joining a community rather than just taking a trip," (Plaeger-McCollum, Zerve, 2015). As it is repeated twice, "making their mark" is an important thing for the Millennials, a by-product of living during the Age of Technology. Where 'likes' and 'follows' have become a mechanism to measure how 'good,' 'cool' and 'popular' something or someone is, it has become more and more important for Millennials to seek out the most unique and crazy experiences to post online with the hopes it will 'go viral' – giving them their '15 minutes of fame.'

B. Authenticity and Getting Off-the-Beaten-Path

Related to this, Gen Y values authenticity. Authenticity, which is generally accepted to be subjective in nature, is "part of tourists' quest to escape from their day-to-day mundane life, attempting to go 'behind the scenes' to find 'authentic' life," (Chhabra, Journal of Sustainable Science [JOST], 2010). Authenticity is even more important to the Millennials than to other age groups, as this generation grew up in the heyday of marketing, bombarded by advertisements, and has therefore become desensitized and too smart to be tricked by marketers (Lee, HVS, 2013). Based on a study by Chhabra, university students were asked a series of questions to glean their travel motivations. He found that a third of the students put 'interacting with locals' at the top (the other two-thirds chose either 'fun and entertainment' or 'sightseeing') (Chhabra, JOST, 2010). An important item noted in Chhabra's essay is the discovery of the gap between the supplier's and tourist's perceptions of authenticity – despite the obvious commodification and 'pseudo-setting,' tourists tend to perceive such places or destinations as 'highly authentic.' Chhabra gives the example of cobbled streets as achieving one of the highest scores of 'true authenticity.' He claims that tourists are gullible and easily tricked; however, a gap in Chhabra's analysis is his ignorance (whether intentional or unintentional) of the broad age and maturity range displayed by the Millennials. Current university students (aged 18 - 24 in 2010), have often not yet had the chance to travel on their own yet, and therefore will react differently to the world than those at the higher end of the Millennial spectrum, i.e. already graduated, in the working world and planning their own holidays.

According to HVS' Top Trends, 70% of Millennials expect special places to offer immersive experiences that are interactive and hands on (Lee, HVS, 2013). Continuing down this path, people, lead by the trend-setting Millennials, are looking for more unique and off-the-beaten-path activities, according to an interview with a representative of Zerve. The US ticketing platform even provides examples of partners who were founded as a direct result of the shifts instigated by Millennials: Tour Guides of New York, Third Wave Coffee Tours and Museum Hack (Plaeger-McCollum, Zerve, 2015). Related to their desire for experiences, Gen Y is always on the outlook for something that would make a great story, photo or social media post. While they may still go to the 'must-visit cities' such as London, Paris, Rome, Barcelona, or New York, or the 'must-see' places in a city (i.e. the Washington Monument, NYC's Museum of Modern Art, the Eiffel Tower and/or Big Ben) they do not want to be shuffled around the city. It isn't about 'ticking off' or doing' the city, or at least, not in the traditional sense. Instead, they prefer to do a authors-themed pub crawl in London, take the Da Vinci tour of Paris, feast with locals in Rome's up-and-coming San Lorenzo neighbourhood, or taking cooking classes in Barcelona; the list is endless.

C. Learning Experiences

In fact, Millennials *want* to be active. They want to learn, to exchange, to exercise, to interact. This is why design hostels have become so popular. Previously, a hostel comprised only of the necessities: bed, linen, toilet. Today, hostels are sleek, sexy, and chic, toying with varied positioning's but always with the same underlying message: stay with us, we'll give you the time of your lives; here you can have a great experience where you will share, explore, and discover. During a 2013 survey, 78% Millennials indicated that they prefer to learn something new while travelling (Lee, HVS, 2013). In fact, roughly half of Canadian Millennials surveyed in 2013 view travel as one of the most important aspects of their lives (a much higher percentage than other age groups). For these young explorers, travelling becomes more than just a vacation: it is an essential component of their personal growth and learning process. In fact, even older generations are remarking this, making volunteer work, Erasmus and study abroad programs, overseas assignments, teaching abroad, and independent travel and backpacking trips attractive and even crucial qualities to boost and embellish CVs, cover letters and job interviews.

In this way, volunteer tourism as a sector in the travel industry is growing. Defined as, "the practice of individuals going on a working holiday, volunteering their labour for worthy causes," it is often promoted as a way to 'experience authenticity' while also becoming a part of a community while being active and adventurous (Font, Smith, JOST, 2013). In their paper, they go on to explain that unfortunately, many volunteer tourism companies use greenwashing and other subtle marketing techniques such as language ('make a difference,' 'inspire change'), attractive photos to instill envy to visit such destination, and playing on potential clients inner selfish motivations (Font and Smith, JOST, 2013).

In their article about volunteer tourism, Font and Smith admit that many people – especially younger people (who are often more vulnerable) – participate in this sort of tourism based on a desire to learn, grow personally or professionally, discover, and/or change, often motivated by self-esteem, pride and self-realisation (Font and Smith, JOST, 2013). While volunteers are always needed, and the vast majority of people can't help but to have *some* selfish motivations (this is human nature), the degree of motivations driven by pride, bragging rights, the desire to spread spiritual beliefs and the search for freedom often work contrary to the sector's overall goals (Font and Smith, JOST, 2013). This suggests that Millennials, while they often mean well, have difficulty distinguishing larger, help-the-community motivations from personal reasons. As already stated, Millennials have a desire to share, to post, to acquire that '15 minutes of fame.' This will chime in later with the need for internet validation for lifestyle choices – they allow themselves to be greenwashed, as they believe that sharing and posting about this experience will give them the validation and attention that they crave.

David Chapman of WYSE takes a more positive look at Millennial travellers and their desire for volunteer and give-back-to-the-community travel. They are in careful pursuit of knowledge and want to incorporate this as well as skill-building activities into travel, providing the examples of host stays, language immersion programs or volunteer projects (Chapman, WYSE, 2013).

D. Price and Spending

There is a mistaken idea that Millennials are 'cheap.' And in some cases, they are – driven out of bare necessity, as some of them are only just now entering the job market. However, it would be a mistake to consider them as 'cheap.' Skift says, "Consistent with Millennials' prioritization of experiences over other purchases, their travel spending often outpaces spending on other items," proving again that early spending predictions about the thriftiness of Millennials is false (Skift, "Selective Splurging," 2015). The Skift article goes to say, "many Millennials are more than happy to spend larger-than-normal sums on trips, it just has to be for the right types of purchases, like experiences" (Skift, "Selective Splurging," 2015). Gen Y does not want to spend cash simply for the joy of spending, nor do they, in general, spend money on something simply because it is a big brand. Instead, Millennial travellers will spend the same or similar *sum* as an older traveller – but on specific experiences that, in their opinion, will get them unique experiences, authenticity, cultural immersion, a great story for social media, or the feeling of 'part of the community' that they crave. They budget when necessary in order to get that really 'cool,' 'exciting,' and 'authentic' experience – Skift uses food tourism as an example: budget on two meals in order to have a an extra special third meal, (Skift, "Selective Splurging," 2015). Skift suggests that travel professionals sell their experiences in parts so that Millennials can 'custom build' their experiences in the manner they desire (Skift, "Selective Splurging," 2015).

As Font and Smith point out, volunteer travellers have a lower price sensitivity – since responsibility is important to them, they will not necessarily choose the cheapest options merely because it is the cheapest, instead searching for the best quality/price ratio (Font and Smith, JOST, 2103). One must remember that this generation was just graduating from high school, university and graduate programs when the world plunged into a global recession, from which it is only recently recovering. Generation Y entered a working world with large student loans, high mortgage rates, lower salaries and few available jobs. Therefore, those belonging to this group have had to learn the hard way the value of money and savings, careful budgeting, strategic prioritizing and conscientious planning and spending. As the saying goes, 'money doesn't grow on trees.' Therefore, Millennials are budget-conscious, and expert prioritizers, but they are not what one would call 'cheap.' After all, there were 227 million Millennials that travelled in 2014 – spending a staggering $250 billion USD on travel-related expenses (Chapman, WYSE, 2015).

The length of these stays also not only changes the way they travel, but it also drives the price higher. The educational experiences remarked by David Chapman in the above paragraphs are often for an extended stay – far longer then their predecessors. "In this way, [the experiences] offer deeper value to both the traveller and the host destination when comparing them to more traditional consumer-centric leisure travel favoured by elder generations" (Chapman, WYSE, 2015). This also means the cost is higher, strengthening the finances in the local community. The CTC found that while "young Canadian travellers are cost-conscious when booking travel services (location choice, accommodation, transportation, activities, etc.), Canadian Millennials tend to travel for longer periods – which makes their per trip spend considerable and important" (CTC, 2013). The survey found that the average amount spent by Canadian youth travellers in 2012 – 2013 was $1,500 Canadian dollars – considerably more than most would expect. In

Canada's case, most of this was spent on trips abroad to the US, Mexico, Caribbean and even Europe. As is the case with larger and isolated countries (such as Canada, the USA, China, Brazil, Russia, Australia…), those who *do* travel internationally will travel for longer periods of time because of the cost, time and distance it takes to arrive in the desired destination. This has a logical affect on price – if a Gen Y tourist visits Europe for three weeks as opposed to five days, their spend will be higher, even if they are budget conscious like Chapman suggests.

E. Connectivity and Social Media

One cannot mention the Millennials without also mentioning social media. The recent rise in social media in the last 10 years has seriously affected how Gen Y does business, keeps in contact with friends and colleagues, shares life experiences, portrays their private lives – and travels.

Sites like Facebook, Twitter, WordPress, Pintrest, Instagram, Tumblr, 500pix, Flickr and many others have so fully integrated into our lives that Millennials actually have trouble remembering a time before their existence. In fact, it is actually quite common for fellow travellers to meet and become friends on the road – staying in touch via nothing more than social media, and even developing deep bonds through virtual channels. According to the study, "15 Facts about Millennials," by the Council of Economic Affairs (CEA), three-quarters of Millennials have a social media account (whereas only half the Generation Xers and less than a third of the Baby-boomers have accounts) (CEA, 2014).

Millennials need to be connected, all the time, in order to share in real-time and remain in contact with friends even while holiday, attests Dutch tour operator, Gert Nieuwboer in a recent interview, director of SNP Nature Travel, a tour operator in the Netherlands dedicated to both adventure and youth travel (Nieuwboer, 2015). "They want to stay connected with friends back home, while at the same time meeting other, young, international travellers is also very important." In fact, some go so far as to propose that this generation needs to be around other people both physically and technologically (via social media) all the time – HVS names it 'isolated togetherness,' or "being alone with a laptop, tablet or Smartphone but sitting in a public place around others doing the same thing" (Lee, HVS, 2013). HVS also mentions that part of this is that Generation Y does not like working alone in their room, so even when travelling on business they tend to gravitate to public spaces such as the hotel lobby, a sunny terrace, a cosy café or local restaurant (always choosing a place equipped with Wi-Fi, of course).

Millennials also expect everything to work instantaneously. "They expect real-time reporting so they feel that they are in the thick of things even when sitting at home," (Lee, HVS, 2013). Not only do they regularly upload photos and comments, but also they expect hotels, tour operators and other travel professionals to do the same – to them, this gives the institution more credit and validation and confirms what kind of atmosphere, design and experience the customer can expect.

They themselves need to be able to post everything on social media – photo albums, selfies, stories, 'check-ins,' invitations, all tagged with @someone and #hashtags, etc. The popular mantra gives life to this idea: "If it's not posted on Facebook, did it really happen?" Many members of Generation Y are actually *driven* by social media, which plays into their need to go beyond the mainstream in order to get the best post that will produce a lot of ‘likes’ and comments as well as 15 minutes of fame. This is even more apparent in Facebook’s recent launch, letting users ‘react’ in several different ways to posts (‘love,’ ‘hate,’ ‘sad,’ ‘shocked!’). Generation Y craves the bragging rights that come with posting a ‘cool’ trip on social media, and going beyond that, this incredibly social generation needs to be ‘validated’ by his or her peers, oftentimes translating into a uploading a post and/or photos on social media sites and accumulating as many likes as possible. As the CTC points out, “‘showing off’ and ‘exhibitionism,’ are high travel motivations for Millennials,” (CTC, 2013).

As Chapman points out, social media has another use – specifically for business: it is a great way to listen to, interact with and even ‘use’ your customers (Chapman, WYSE, 2015). Given all the points above, it is clear that young travellers will write anything and everything on the Internet – including reviews of all aspects of their trips. This is a good thing for businesses, as it gives them the ability to listen to what these customers are saying, and make any necessary improvements. After all, as Gen Y ages, they will become the main travel spenders.

F. Technology and Peer Reviews

Online reviews are also something that has become increasingly popular. As Millennials know all the tricks of marketing, they have developed a mistrust of advertising, and have therefore turned to their peers, whom they feel more inclined to trust, since they are ‘a person just like me,’ (Lee, HVS, 2013). On average, a Millennial traveller in 2013 will check 10.2 sites before booking travel-related reservations (Lee, HVS, 2013). The rise in sites like TripAdvisor and Yelp, as well as the increasing trust in reviews on hotel sites, Airbnb postings, tour operators Google reviews, and even chat boards dedicated to other categories such as airlines indicates the verity of this trend.

It has to do with the changing ideas around the notion of ‘trust.’ Millennials simply have more trust for reviews and recommendations by nameless, faceless, often anonymous bloggers and other travellers who have shared opinions and tips online than the sites themselves – mostly because they have grown up bombarded by advertising and have little trust in corporations (Chapman, WYSE, 2015).

According to both Chapman and HVS, having a comment section on a business’s website and carefully monitoring your TripAdvisor reviews can be helpful in the long run. Even negative reviews can A) show a business owner the gap in his service, B) find a solution to this gap and C) respond and ‘flip’ the negative comment online for all other users to see, giving the image of company who cares about and listens to its customer – therefore strengthening the company’s image (Chapman, WYSE, 2015) (Lee, HVS, 2013).

Zerve, the ticketing platform, concurs with WYSE and HVS’ response. Zerve has adopted a policy in which every single person who buys a ticket through their platform is requested to review their experience, and Zerve works with their partners and other industry members to encourage other businesses to do the same (Plaeger-McCollum, Zerve, 2015). This is a smart policy, as it allows communication to flow easily between customer and business without the added tension of expressing discomfort or issues face-to-face. Zerve makes it easy to do so by providing a Fan Page on social media in which they can post photos and/or experiences. “About three-quarters of people who post photos also share [Zerve's] Fan Page on social media, demonstrating how important sharing has become for the customer experience as well as for word-of-mouth marketing," (Plaeger-McCollum, Zerve, 2015). Plaeger-McCollum brings up another important point: yes, even though Millennials share large amount of personal opinions via social media, this is merely a branch of what one calls 'word-of-mouth marketing – yet a very dangerous one, as opinions, photos and posts can and will be seen by hundreds, thousands, even millions of people.

Booking, too, is changing in the hands of Millennials. As noted above, Millennials have a need to be connected all the time, and have a strong attachment to their Smartphones, tablets, laptops and other pieces of recent technology. According to the CTC study, 62% of Millennials book trips online, with 68% using multiple websites (CTC, 2013). As WYSE's director David Chapman puts it, "What would you do if I told you that Millennials check their Smartphone at least once every five minutes and bookings via mobile devices have nearly doubled within two-year's time?" (Chapman, WYSE, 2015). That is a significant change, and something that both experts and business owners are slowly realising requires a quick and efficient response. Millennials simply use their phones *more* than any of the other (older) generations. In a survey done by the Pew Research Center (PRC) asking about the amount of texts sent/received in the past 24 hours, it concludes that "the typical Millennial sent or received 20 texts in that period, compared with a dozen for a Gen X-er and five for a Baby Boomer," (PRC, 2010). This has most certainly increased in the past six years since this survey was taken.

In fact, for many sources, it is this incredible ease and use of technology that differentiates Gen Y apart – both from an outsider's perspective, and among the Millennials themselves. "Roughly a quarter of those under age 30 (24%) say technology is what sets their generation apart," when asked what, if anything, makes the generation born between 1980 - 2000 special (PRC, 2010). For Zerve, who has a large Millennial client base, "On any given day at Zerve, 50% or more of our web traffic comes from mobile devices," (Plaeger-McCollum, Zerve, 2015).

Gen Y even book at differing rates, with 17% booking last minute (CTC, 2013). Mobile bookings have increased dramatically over the last few years, and research has shown that if a site is not adapted to mobile devices, many young users will simply exit the site and search for another. At Zerve, they "make the [mobile] process as seamless as possible. Our site is mobile-optimized for people to find, choose and book activities on the go, and I strongly encourage all of our partners to mobile optimize their sites," (Plaeger-McCollum, Zerve, 2015).

A 2013 Google Survey found that "42% of Millennials are more likely to use Smartphone/tablet for travel info while on a trip than a computer or laptop," (marking a 9% increase from 2013) (AMEX, 2014). While mobile bookings still only represent a small percentage of overall expenses (2% in US/EU/Japan), they account for the vast majority of last minute bookings – 70% of reservations made within a 24-hour window of arrival in 2013 were made by mobile bookings (AMEX, 2014). These facts and figures show that while mobile bookings are not currently the highest earners, they are an important aspect of today's transactions, and there numbers are rising.

The AMEX report also remind readers that while Millennials do use tour operators to book, they don't take the first one they find. Millennials are tech savvy and they do a lot of research before they reserve anything – this is why the AMEX survey points out: "Millennial travellers expect all companies to offer detailed information about their offerings via their company website, alongside easy-to-use tools as well as provide the website and transaction page available via mobile – plus transactions in real time," (AMEX, 2014).

G. Changing Attitude

Many aspects of the Millennial traveller's state of mind differs from older generations, and are important to take into account when analysing this generation, especially from a business perspective.

Related to the earlier section dedicated to authenticity, Millennials respond better to local businesses rather than big chains (AMEX, 2014). In fact, many Millennials, especially those interested in travelling, are 'anti big-brand,' going out of their way to ignore the 'great' brands (AMEX, 2014). They are searching for 'authentic' experiences, "advocated by cultural continuity, originality and genuineness as made locally by ethnic communities," (Chhabra, JOST, 2010). This means that businesses that are – or appear to be – local have a significantly higher pull. This phenomenon explains the fast and successful rise of Airbnb and other similar establishments.

They have also simply travelled *more* than other generations due in part to the opening up of borders (one example is ex-communist states), new developments in transportation (i.e. high-speed trains, faster jets, better cruises, more reliable cars, etc.). Other reasons include: enhanced information to dispel fears or stereotypes (in developing countries like Eastern Europe, Central and SE Asia, China, some parts of the Middle East, and many (though not all) countries in Latin America), the 'new' social acceptance and expectation of travel throughout our lives, and the ease in staying connected with family and friends (via social media, Whatsapp, Viber, Skype, iMessage, Facetime, cheaper international calls).

According to a survey by HVS, Generation Y travels on average 4.2 times per year compared to 2.9 by Generation X and 3.2 times per year by the Baby Boomers (Lee, HVS, 2013). As already noted, the average length of stay for 1-week+ trips is 13.6 nights, higher than other age segments (CTC, 2013). As they have travelled more, this also means they are willing to go further abroad, and to partake in activities that are more unusual, adventurous, with 'controlled spontaneity," (AMEX, 2013). For European itineraries, instead of the staying on the typical 'London-Paris-Barcelona-Rome' circuit, this generation is willing to stray of the path and visit lesser-known places such as Edinburgh instead of London, Lyon instead of Paris, Segovia instead of Barcelona, Turin instead of Rome, with new additions such as Budapest, Ljubljana, Tallinn and Krakow, not to mention increased interest in natural destinations such as parks, mountains, lakes or forests, rural countryside retreats, small urban destinations, and unique landmarks. For the same reasons, Millennials are also ready to delve into unusual or off-the-beaten-path activities in these unusual or off-the-beaten-path they have chosen – in fact, the unusual choice of destination, well off the expected tourist track with expected experiences to be followed, travellers to these types of destinations are much more willing to step outside of their comfort zone and/or traditional tourist behaviour, tasting 'strange' food and drink, attempting new sports or activities, sleeping in less-than-mainstream accommodations, and forging connections with locals. This also applies with destinations that are further abroad, but for the purpose of this paper, I will focus on Europe and European travel.

Not only that, but the Internet – giving rise to Internet 'celebrities' – has amplified the Millennial need for that '15 minutes of fame.' Whether that is achieved by tallying the number of 'shares' on a Facebook post, the number of 'likes' to an Instagram photo, the numbers of 'followers' on a Twitter account, or the number of views on a personal blog, Millennials feel compelled to *have* the best experience – and then to be able to *share* the best experience. Many often say this leads Millennials to crave 'bragging rights' – i.e. something along the lines of 'my trip was better than yours,' but this remains to be proven. In any case, social media and a smaller world is leading Millennial travellers to search for that next thrill, that unique adventure, that crazy experience necessary to make them Internet sensations, even if only briefly, and only among friends.

The malady of the Millennials is FOMO, or, 'the fear of missing out,' is the constant worry that friends (even if they are only vague acquaintances), family, colleagues or even random Internet followers are having 'more fun' than you are. In order not to 'miss out,' Millennials must keep 'upping the game,' i.e. find more interesting, unique, crazy, thrilling, fun or exotic experiences, destinations, people and tastes to document and share with the outside world. This has lead to the current way of thinking, 'If it's not on Facebook, did it really happen?' – meaning, of course, that everything important must be 'validated' by the Internet (which, most of the time, is made up of a collection of 'faceless' users who have little to no personal contact with the person making the initial post). This constant need for validation pushes Millennials to seek new thrills and ideas. While a vicious cycle and perhaps not the most productive way to live, this is both good and bad news for travel officials. In a way, it is good – Millennials are pushed to travel further and farther in search of the next great sensation, or of unique experiences to combat their FOMO. But for some in the tourism trade – mass tourism for example – means that Millennials will not be content with the same old, same old. According to the collective literature – including the PRC report, "Portrait of Generation Next" – Millennials require a new freshness to their itineraries, new destinations, new ways of travelling, unique accommodations, experiential travel (i.e. travel that revolves around experience creation rather than tangible items), authenticity, high thrills, more variable itineraries.

H. Sociability

Millennials are sociable creatures. When travelling alone, they practice 'isolated togetherness,' as noted above, meaning that they would rather sit in a crowded café or terrace working or socialising on their tablet rather than alone in their room – even if they are working alone in both scenarios. In addition, 58% prefer travelling with friends, which is 20% higher than older groups (Lee, HVS, 2013). As mentioned above, this is also directly linked to the recent success in design hostels, apart-hotels, homestays, Airbnb, gites, B&Bs, and niche hotels promoting 'togetherness,' among other things. They want to talk to locals or other travellers. Whether they are chatting with a fellow traveller in the hotel lobby, the waiter in a local café, the local guide on their kayak trip, or people in a city pub, Millennials value social interaction.

They also strongly believe in the idea that they can and do impact the world – and that even one voice counts. As Font and Smith report on the motivations behind the rise in volunteer tourism, "There is general consensus that voluntourists' main priority is to genuinely have a positive impact on a less developed community," contributing to this idea that 'I can do something' and 'My voice counts,' (Font and Smith, JSOT, 2014). While these voluntourists are often slightly egoist in their reasons for choosing this type of tourism (looking for adventure, self-realisation, etc.), the fact remains that they want and need to have social interaction with their real or perceived community.

Generation Y is also more likely to start campaigns for issues they care about – indeed it's never been easier with the internet, blogging and social media – or participate in volunteer tourism. They truly value the role they hold in their communities – whether at home or abroad. "High school seniors today are more likely than previous generations to state that making a contribution to society is very important to them and that they want to be leaders in their communities," according to the CEA study (CEA, 2014). CEA also states that roughly half of the Millennials surveyed report close family relationships, even citing the importance of living near their family (CEA, 2014). However, this is not to say that they are not willing to move; indeed it is quite the opposite. Millennials care about their family, but they also have a strong work ethic. They are willing to re-locate in order to study at university, to participate on a study abroad, to find their first job, to climb the corporate hierarchy, to have a new experience or accept a promotion (AMEX, 2014). They just make sure to come back home often.

I. Environmentally Conscious

They are also more environmentally conscious. In addition to preferring local businesses, they are also more conscious about their actions. The Canadian report states, "[Millennials] are more environmentally and socially aware than any other age segment…and they embrace social values, innovation and environmental consciousness. " (CTC, 2013). As I have already established that feeling 'like a part of the community' is important to them, this should not be unexpected. As remarked in Font and Smith's article on volunteer tourism, this segment has seen a large increase in recent years. Even if, as they argued, some of the travellers' reasons may be 'selfish,' and some companies who provide tours apply greenwashing and other borderline practices, the fact remains that today's young travellers at least *want* to have a positive impact on the communities they visit (despite not always being the case) (Font and Smith, JOST, 2010). Going off this point, PRC finds that "Beyond marriage and family, 21% of Millennials say that helping people who are in need is one of the most important things in their life," (PRC, 2010). This is an aspect that spills over into their travels as well, driving things like volunteer tourism, responsible tourism, consciousness while travelling, favouring of local products, and adventure tourism.

J. Business

Millennials are just starting to become business travellers. Unlike older generations, they prefer to take the time to explore the city or place their job sends them, taking off at least a day before or after their business is finished in order to do so (PWC survey, Rendell).

They are also more likely to aspire to be entrepreneurs. This shows the great independence, gumption, and drive that Millennials have compared to older generations. A large part of this is the decreasing costs of creating and distributing digital content, "creating opportunities for this generation to be pioneers in production, as well as consumption, of technology" (The Council of

Economic Advisors [CEA], 2014). Indeed, CEA references a study called "Young Invincibles," which states, "more than half of the Millennials surveyed expressed interest in starting a business" (CEA, 2014).

This is largely related to the larger amount of Millennials that are studying at an institute of higher learning. According to the study by CEA, "In 2013, 47% of 25 to 34 year-olds received a postsecondary degree (Associates, Bachelor's, or Graduate Degree) and an additional 18% had completed some postsecondary education," which is larger than any other generation (CEA, 2014). In addition, those who chose to go to university choose degrees that more directly correspond with the jobs instead of traditional (but broad) liberal arts degrees (CEA, 2014).

Millennials feel that businesses must be driven by innovation and progress, hence their entrepreneurial mind-set. In general, they have a positive view on business and how it relates to a wider society though they also recognise that for a business to function, it has to make profits, according to the 2015 Deloitte Millennial study (Deloitte, "Mind the Gaps."). This means that as Millennials mature and climb through the business ranks, innovation and progress should follow. According to the Deloitte study, Millennials think that businesses are underperforming when one compares what businesses *should* be doing versus what they are *actually* doing. And, perhaps most importantly for travel, Millennials are increasingly demanding a 'sense of purpose' as part of the greater reason they chose their specific job/career/company over another, the Deloitte Study claims. This means that Millennials are not content to do unfulfilling or repetitive jobs, but rather a job that in some way, buys into their beliefs. This interacts with tourism in the rise of volunteer tourism, working holidays, and the sense of 'learning something new' while travelling. Millennials, in business and leisure, demand an environment off the beaten track, full of new challenges and innovative ideas. They value innovation, creativity, and strong business values, and they expect tourism professionals to adhere to the same values. Millennials want to create their own path as opposed to take the well-established path laid down by the generations who came before them.

K. Restrictions

One of the major factors that hinder today's travellers more than ever is the growing necessity of visas. Certain countries have a 30-, 60-, or 90-day grace period ('tourist' visas, though no visa request is required; it is simply the amount of time from date of entry). Within the Schengen countries, there is (relatively) freedom of movement (N.B. with recent terrorist attacks, civil unrest and the migrant crisis, this is changing – especially in France, which as of August 2016 still has a declared state of emergency; it is not known if this is a temporary ordeal or whether unrestricted free movement will be reinstated). Other countries have partnerships for visas with specific nations, letting travellers visit for up to 6 months or a year (such as the UK and Australia, or France and Canada). Some countries merely require a small fee to be paid for the visa at the airport (such as Costa Rica). Others require a relatively blanket visa process for tourism – bureaucratic but straightforward (e.g. USA or Russia). Many other countries are closed, requiring complicated, expensive and often ridiculous visa processes. Therefore, it seems rather obvious that Millennials will visit the destinations that are open and available to them in much greater numbers than destinations that require visas. These will also be the destinations they will share on social media, rate on the Internet and recommend to friends and family. "Visa procedures present a hurdle for many young travellers; WYSE research found that 12.5% of millennial travellers faced visa-related problems when planning their last trip abroad. If you're a Chinese millennial, the situation is even more difficult. Overall, this potentially represents more than 20 million trips a year that destinations are ignoring" (Chapman, WYSE, 2015).

Safety and security are also in the minds of every Millennial travel, and even more so recently. Between September 11th to the London Bombings, from the Istanbul Riots to the Arab Spring, from the Paris, Nice and Brussels Attacks to the migrant crisis – not to mention threats posed by ISIS, the Ebola outbreak, as well as food scandals, plane crashes and increased petty crime rates, it is small wonder that Millennials are nervous about travelling. Even so-called 'safe' European destinations (i.e. London, Paris, Brussels, Madrid) have been attacked. Bombs have been exploded in places connected to tourism (airports, restaurants, concert halls, metros, stadiums). Planes have been shot out of the sky. Record numbers of illegal immigrants are streaming into Europe via the Mediterranean Sea. Sexual harassment rates have escalated. Young travellers are still excited to visit foreign countries – but have certain reservations. The desire is there, "but they don't have the experience to plan these trips, and they are nervous about their health, safety, and ability to operate in a country where they may not understand the language or currency (AMEX, 2014). Therefore, the authors urge travel companies to fill in those gaps for travellers by developing more extensive networks of hotels, local guides and other resources in a broad range of countries (AMEX, 2014).

PART III: METHODOLOGY

A. Introduction

At the start of this project, I aimed to determine the relationship between tourism and the Millennial Generation. After establishing the traits of the Millennials, as well as their generational habits relating to tourism (summarized in the Literature Review section), it has become clear that this generation of tourists travels very differently than older generations. It appears that there are many gaps in the travel and tourism industry that need to be filled and/or changed in order to better attract Generation Y.

Resumed from above, current research attests that Millennials search for authenticity, prefer experiences over souvenirs, have a need to share (often real-time reporting) via social media and blogs, show environmental consciousness, desire learning experiences and volunteering, have a higher education, are willing to spend more, and have predilection to technology. Therefore, it has become clear that traditional travel and tourism marketing, promoted and sold successfully to the Silent Generation, the Baby-Boomers and Generation X will not work with the Millennial Generation.

Therefore, I began to look at the types of travel that *did* fit with these traits. It was then that I realised that adventure tourism – encompassing responsible, sustainable, volunteer, nature, and eco-tourism – fit the bill demanded by these younger travellers.

Adventure tourism, defined by the global authority on this branch of travel, the Adventure Travel Trade Association, is detailed as overnight travel to a foreign destination (*not* necessarily a foreign country), and includes at least two of the following three elements: physical activity, natural environment, and cultural immersion. An example itinerary could be a 3-day cycling trip through the French Alps, where guests hold a picnic to taste local cuisine and sleep in a homestay with a local family. Using the above definition as well as the criteria upheld by the majority of Millennials based on the elements in the 'Literature Review' section, adventure tourism seem to fit comfortably with the Millennial travel demand. However, my theory is that there is a difference between what Millennials desire and expect when traveling or planning a trip and what the tourism industry *perceives* they want (and subsequently bases their products, customer service and marketing techniques on). Therefore, in order to fill this gap (between what Millennials want and expect in relation to travel and what the current offer is), I decided to study the effects of adventure travel and Millennial travel preferences, and whether adventure tourism is an appropriate response to the Millennials changing travel news.

I linked Generation Y with adventure travel, noting it as an appropriate solution to fill the current and long-term demands of Millennial Generation – though I fully recognise that is only one piece of the puzzle, so to speak, and not the only solution for the demand created by Millennial travellers.

As Millennials are currently between ages 16 and 35, they will soon become parents, starting families of their own. Therefore, it is important to keep this is mind when considering the future of travel, i.e., how much will these changes affect long-term tourism.

After doing this initial research pertaining to the Millennial Generation, the tourism industry and tourism businesses, it became evident that I needed data from two broad sources: the businesses/tourism industry and the Millennials themselves. Continuing off of this subject, I created two surveys with the future of the travel industry in mind.

B. Differences in Perceptions

Much general research has already been done on the Millennial Generation on many subjects, including travel (in a very broad sense). However, after perusing leading research on this subject, and consulting with industry leaders, it became clear that there is very little interaction between the Millennial consumer and the travel industry professionals attempting to sell tours to Millennial consumers. As a Millennial traveller myself, I became aware of the widening gap between the *perceptions* of Millennial consumers and that of the travel professionals.

In order to help tour operators and other professionals in the field of adventure and responsible tourism, I have decided to find and note these gaps. In doing so, the objective is to bring to light differences in the perceptions of what Millennial travellers want, as opposed to what travel businesses *think* that they want. This is all in order to better educate the travel industry professionals in order to provide a better and more complete service that is attractive to Millennial travellers. This should, in turn, attract more Millennials, who can expect a better service tailored to their needs and wants.

Therefore, the final version of both surveys that were created was nearly identical, with certain specific questions for identification and classification purposes for the Millennials and travel professionals. These surveys were created with the mind-set of comparing the results in order to compare perceptions versus reality in terms of Millennials and adventure tourism.

C. B2B Data - Tourism Businesses in Europe Pertaining to Adventure Tourism

After forging guidance and initial connections with leaders on the market who have strong interactions with Millennials – such as WYSE (World Youth Student and Educational Travel Convention), SNP Nature Travel, Zerve, etc. – I was able to gain further insight by researching and interviewing travel companies and tourism boards such as G Adventures, Terres d'Aventures, Un-Cruise Adventures, Discover France Adventures, ExperiencePlus!, the Jordan Tourism Board, faralong.com, Visit Greenland, Cyclomundo, and many others. These organisations, and many others, are regrouped under the umbrella of a single association, the Adventure Travel Trade Association (ATTA). With over 1,100 members in 90+ countries, the ATTA seemed a good place to start.

The Adventure Travel Trade Association is a global travel and tourism association operating in the niche of adventure tourism, which provides the industry with quality connections between members, travel and tourism-related news, B2B networking, global and regional events, market research, education (both online and physical courses), a B2C platform to sell trips, and media coverage. The ATTA includes tour operators, tourism boards, specialty agents, accommodations, industry partners and gear suppliers, all of which have a vested interest in adventure and sustainable tourism. It seemed an appropriate place to acquire data on the adventure travel market, to confirm if it is indeed a solid response to the changes in the tourism industry demanded by the Millennials.

As mentioned before, I personally interviewed several leaders in the adventure tourism industry that have succeeded in acquiring Millennial guests and catering towards Millennial demands: WYSE, SNP Nature Travel, and Zerve. I then formed a connection with Dr. Milena Nikolova, from the American University in Bulgaria, an expert on Millennials, tourism and marking, who also consults for the ATTA. Because of their combined expertise, these interviews served to furnish insider knowledge, providing a baseline and direction to create the surveys that would eventually be sent out to other businesses.

I also conducted countless "informal" interviews with travel industry professionals while attending ATTA's event, AdventureNEXT~Balakns, a regional convention of 300 delegates that took place in Ohrid, Macedonia in May 2016, but represented all 12 Balkan destinations. These interviews, while informal (and therefore not recorded) cannot be counted in a qualitative way (i.e. no concrete data or statistics were acquired), they did serve to give me a better overview of the adventure tourism environment and how adventure travel businesses acquired, worked, and interacted with their clients, Millennials included.

In order to get further data, I created a survey specifically designed for travel businesses operating in or around the adventure travel sphere. The survey was superficially divided into two parts: qualitative questions and quantitative questions. The qualitative questions were designed to get info, such as the respondents' location, their primary target clientele, changes in Millennial behaviour, etc. The qualitative questions were designed to get an idea of what they thought Millennials expected, when/how they think Millennials plan, what holiday activities they think they are interested in, what they think are their motivations to travel, who they go with, what would push Millennials to use tour operator, how they think Millennials use social media regarding to their trip.

This was sent out via company email in conjunction with the ATTA's weekly company email containing its newsletter, AdventureTravelNews. The weekly newsletter, AdventureTravelNews (ATN), is sent out to all 1,100+ members. ATN is also sent out to anyone who has signed up for it. It has roughly a 22,000-person global readership, meaning that the maximum number of travel industry professionals who have seen the survey is 22,000. As only European tour operators were targeted, it was sent out to roughly 200 European tour operators who are currently members of the ATTA.

AdventureTravelNews, a weekly newsletter sent via email, is a well-respected trade journal in the travel and tourism field, with a concentration in adventure tourism. Examples of other types of articles that run include trade news (such as new travel-related regulation), industry trends (such as a rise in solo travellers), new member profiles (of ATTA members), member news (such as an ATTA member's new program) and ATTA's own news (such as reporting on ATTA Events). This organisation has sent out surveys before – (most recently a survey regarding the adventure cruise industry) – so respondents are not new to receiving or filling out surveys.

It was also shared on the ATTA's official Facebook page, as well as shared on the pages of top ATTA employees, including the professional Facebook page of ATTA's president.

It is important to note that all respondents to this survey were told that if they completed the entire survey and left their contact information at the end, they would eventually receive a report detailing both the details from this survey as well as those from the Millennial survey. Therefore, it is clear that any operator who took the time to finish the survey must hold some interest in the results, and in understanding what make a Millennial traveller consume.

D. The Consumers - Millennials Based in North America, Europe, and Beyond

In order to fully aid tour operators to prepare for Millennial travellers, I realised that I needed to reach the Millennials themselves. Only actual Millennials would be capable of truly expressing what they wanted when it comes to travel – and whether adventure tourism really does meet their updated demands on the travel spectrum.

Therefore, in order to measure what their travel-related demands were, and whether these demands do indeed match up with adventure travel principles, it was necessary to create a second survey.

In order to be able to compare the two surveys, this survey was very similar to the first one. The questions were altered to fit the Millennial perspective, but designed to answer the same questions for comparison's sake. It also superficially divided into the same two sections: quantitative, and qualitative. The qualitative questions merely verified that the respondent was indeed a Millennial, where they were from, and where they preferred to visit (in order to focus on Europe). The second part – qualitative – was far longer, and was designed to get a better idea of what the Millennial tourist wants. The questions asked included inquisitions about preferred activities, destinations, length of stay, required elements of a trip, travel partners, use of tour operators, use of low-cost or alternative travel means, how often they travel, and when they book. In effect, the data collected should be on the same subjects of the data collected in the tour operator survey.

Unlike with the tour operators (in which I specifically targeted those based in Europe), I did not target one geographic location for the Millennial survey. Only age was of importance – anyone who was under 16 or over 36 was immediately thanked for their interest in taking the survey, and bounced to the end, in an effort to avoid outlaying data. However, a person's current or past address does not classify as 'outlaying data' as nationality does not determine travel destination, nor does it impede a respondent's possibility to travel to Europe, which is the survey's geographical interest. The important thing is to capture the Millennial consumer's needs, desires, demands, and expectations in all steps of the travel process, and take in any geographic variations. In that, I can compare data collected from the Millennial survey to results from the tour operator survey in order to locate the gaps and suggest ways that both adventure travel and adventure tourism operators can fill this gap in the foreseeable future.

This survey was distributed in several ways. One, this survey was distributed via social media such as Facebook and Twitter in which friends/acquaintances/followers were asked to complete the survey. In this way, I was able to collect responses from many nationalities, including American, Canadian, British, French, German, Polish, Italian, Spanish, and Chinese. Two, it was sent to students and alums of the American University of Bulgaria, a private university located in western Bulgaria, with over 1,000 top students from 40+ countries. This school was chosen to incorporate the Eastern European population, as well as to get a wider interview base (as the school represents many countries, especially in Eastern Europe). Three, the survey was sent out to INSEEC students via the MSc 1 Facebook page, in order to get the Western European point of view. This school is also international and represents many countries.

Conclusion

In this way, data could be collected from both ends of the spectrum to better understand what – if any – connection exists between adventure tourism and Millennials, in order to understand if adventure tourism can fill a gap for Millennial travellers looking for new travel experiences.

Additionally, and perhaps more importantly, the comparison of the results from both surveys also allows us to compare the perceptions of Millennial consumers by European tour operators with the actual and current demands perpetrated by the Millennial consumer base.

PART IV: PRESENTATION AND DISCUSSION OF RESULTS

Introduction

As stated above, the below results have been collected from two separate surveys. The following analysis section is broken up by category, for ease of the reader. For each of the main points, the tour operator perception to the topic or question is given first, then the Millennials true point of view. The next paragraph analyses them together, comparing them question-by-question. Then, I will pinpoint the gaps – i.e. the places where tour operators could improve upon. Lastly, I will identify possible steps for tour operators to take in order to prepare for and meet the demands of the Millennial Generation.

Two surveys, one for the consumer (i.e. the Millennial Generation) and one for the producer (i.e. European tour operators offering product outside of mass tourism), were filled out by 215 and 42 respondents respectively, in order to compare the operator's perceptions against Millennial expectations.

As a general note, this paper focuses only on European tour operators (TOs), the adventure travel offer in Europe, and how European TOs can prepare themselves, their product/offer, and their business practices to attract, welcome and retain this important new group of travellers. Therefore, every time the paper refers to 'tour operator' or the shortened version, 'TO' or 'TOs,' it refers specifically to European tour operators. It is entirely possible that tour operators globally think, act and operate in the same way, and it is very possible that the same conclusions can be drawn, the same practices outlined below can be adopted, the same mentality and actions can apply to TOs based on other continents. However, it is not possible to conclude without any doubt, as only European TOs were interviewed, studied and analysed with this survey, as the focus of this paper has been entirely on European tour operators.

A. Who is the Millennial Generation of consumers?

A.1 – Travel Industry Professionals

To understand who completed the tour operator survey, travel professional respondents were asked to identify who they are. 58% are owners or executives, 11% are marketing staff with a further 11% who are product managers, and only 5% of sales directors. (Outliers include a journalist and a business development manager). 41% have headquarters in Western Europe, 38% in Eastern Europe and 9% in Scandinavia. Allowed to choose two regions, respondents were asked to claim their primary and secondary source markets or client bases – with 80% choosing Europe, 54% choosing North American, 9% adding in Asia, and 3% for Oceania. Central/South America and Central Asia received no votes. As for the destinations they sell within their tours (when asked for their top three regions), TOs chose Europe as part of their top three regions 86% of the time. Asia scooted into second place, though only 22% placed it within their top three. North America garnered 14% with South America following at 11%. Clearly, European TOs tend to be suppliers, selling tours 'in their own backyard,' as opposed to selling tours in faraway destinations, or acting as buyers (those who buy tours created by a local supplier in order to sell it to their clients. This is often the case with North Americans and some Western Europeans).

Client profiles of tour operators, hereafter referred to as 'TOs,' reported that couples aged from 36 to 55 were the in top three profiles 54% of the time. Couples aged 56+ closely followed, with 48% of TOs rating this group as part of their top clientele. Groups of friends 36+ were ranked third – 42% - and solo travellers 36 - 55 acquired top marks for 29% of TOs. As for Millennials, whether solo travellers, friend groups, or couples, they all ranked between only 3% and 22% - clearly, not the current priority or focus. But with an aging clientele, who have both dwindling mobility and financial reserves, TO businesses will need to start attracting younger travellers to get ahead of the 'next' generation. One caveat, as many travellers who are TO clients are older in age, mean (instead of average) age may be a better way to acquire data for this type of question in the future

A.2 – Millennial Consumers

As for the Millennials, the first marker was age – only those answering 18 – 36 were able to answer the survey. 64% were employed full time, 24% are still students and 5% were either interns or employed part time. Less than 2% are unemployed. Owning to the fact that most Millennials are employed, or students soon to be employed, clearly they have a good work ethic, meaning are more likely to have the resources to travel. 33% of Millennial respondents reside in North America, 29% in Eastern Europe, and 32% in Western Europe (making 61% total residing in Europe). Despite my European focus, I chose to not to disregard Millennials who resided outside in Europe, as living outside of Europe does not stop him/her from being a potential consumer in Europe.

A.3 – Defining Millennial Characteristics

Starting off both surveys with a 'fun' question, TOs largely chose t*echnology* and *connected* as top traits (see figures 2A and 2B). Many do refer to their adventurousness, curiosity or uniqueness, as well as their need for thrills and 'we do it because we can' attitude. TOs also seem to think Millennials are selfish and demanding though conscious of the outside world. Understanding the client is necessary in order to sell your product to the client – questions such as what they want, need, and expect as well as who they are, how they live, what makes them 'tick' are indispensible to marketing and creating tours that they are willing to buy.

Despite Gen Y being constantly thought of as high-tech, when asked the same question, the highest reoccurring words from Millennials themselves were: *adventurous* – appearing in 30% of responses – *curious* (11%), and *spontaneous* (9%). Other top reoccurring words were *impulsive, open, unplanned* as well as using a variety of ways to say that budgeting is important. Interestingly, only 11% combined used the words *tech*, *technology,* or *connected,* an interesting deviation from the common view (see figures 2A and 2B). Asking respondents to write about recent trips allows for more insight. Already, the wide breadth destinations visited by respondents is extraordinary. From backcountry USA to remote glaciers in Iceland, from Parisian streets to road trips through Belarus, from an isolated Taiwan to the party scene on Australia's Gold Coast, it seems Millennials travel everywhere, determined to live and love every moment. Replies referenced meeting local people, trying local cuisine, exploring new cultures. Mentions of architecture or the mountains were common, though most discussed their *experience* with or at their destination(s) of choice.

Millennials see themselves as adventurous, open-minded, curious, spontaneous and budget-conscious yet travel professionals instead see this generation as hooked on their phones, extremely tech-savvy, connected and interested in (or even 'obsessed with') social media. From the beginning, we begin to see that there are many misconceptions about this generation, and about how members of Gen Y perceives themselves versus how business owners perceive them. Despite differences, it is important to note that both TOs and Millennials rate this generation as 'adventurous.' As it is the one thing all parties seem to agree on, it makes for a good start.

An interesting note, Millennials apparently think 'travel' means 'going abroad, to a foreign country.' Though the given definition states that travel is the deliberate action of going to a foreign destination (not necessarily foreign country) with an overnight component, many people referenced only far-flung, multi-country trips. Only a few mentioned visiting local sites, and they backed up this claim citing financial reasons, as if they would have gone further if money allowed. This evidently means Millennials do not think of visiting friend, a long weekend in local city, a local camping trip, or a short romantic getaway equals 'travel.' TOs seem to think the same way, defining travel by creating far-away, complex itineraries. Most likely because of the way Millennials view travel, 60% of this generation claim they take only two to four annual trips – on par with what TOs believe. Though not specified, based on the above statement, it is probable that these are far-flung voyages, not a weekend or local trip. I hypothesize that these shorter, local trips are 'extras' outside of this figure. When Millennials travel, they expect to travel to the fullest extent, searching for adventure, new cultures and ideas, new tastes and smells and scents, high thrills, connections with foreign people, exotic destinations and unique experiences. Therefore, TOs can take advantage of this by creating itineraries that combine adventure and exoticism with the authenticity of interacting and experiencing new cultures Millennials crave. TOs may be right when designing only exotic or remote itineraries – Millennials may not purchase a local trip if they do not view this as 'travelling,' despite the true definition.

B. Preferred Travel Companions

TOs seem to think that Millennials prefer travelling with friends more than anyone else. Yet, despite the fact that 18% of Millennials marked N/A for 'Spouse/Partner' (meaning they do not currently have one), 'Spouse/partner' still won the vast majority of preference. It is true that 'Group of friends' came in second, but one must consider that half of all Millennials marked 'Spouse/partner' as 'Most preferred' compared with a mere 16% for travel amongst friends. As they age and find their life partners, this trend will seemingly only grow stronger. This gap shows that TOs need to be better prepared to attract and market to younger couples as well as their current clientele of older couples. Travelling alone is an interesting outlier – TOs tended to rank solo travel as neutral, while Millennials tended to gravitate towards one end of the scale or the other. It would appear that solo travel is something that appeals directly to some while seeming distasteful for others. Interestingly, several Millennial respondents *did* mention solo travel in the open-ended question, so I hypothesise the gap is in the wording of the question: "With who do you *prefer* to travel?" – some may want to travel, but may not have a travel companion for their preferred trip or destination. So, perhaps necessity wins over preference.

On the Millennial side of things, most Millennials rank 'Spouse/partner' within one of their top three ranked travel companions (according to the 52% who chose it), while 'A group of friends' (16% - 'Most preferred,' and 20% 'Preferred'), 'A friend,' and (14%/24%) and 'Alone' (12%/11%) seem to be similar in numbers. 'Alone' is also the top-ranked 'Least preferred' (37%). This goes contrary to popular belief of the solo Millennial going against the world for the sake of extremity. TOs, on the other hand, ranked that most Millennials prefer to travel 'With a group of friends' (34%). 23% of TOs instead chose 'Spouse/partner,' compared to 53% who marked 'With other family members' as the least preferred companion. Both 'Alone' and 'With a friend' where relatively evenly divided.

C. Millennial Travel Motivations

To note any gaps in perception regarding to travel motivations, TOs were asked to mark what they think would be part of the top reasons (up to three choices) Millennials would decide to plan a leisure trip. 87% chose 'They want to try new things (food, drink, activities)' as a top reason, with a further 55% who believe 'Millennials want to experience a new culture,' 52% choosing 'A break from daily routine,' and another 52% guessing the traveller's desire to visit the specific destination (see figures 1A and 1B). In the comments section, TOs added 'A desire for bragging rights' as an additional reason.

Top Millennial travel motivation were, 'A break from routine' (i.e. a push factor – put amongst the top three by 62% of Millennials) and 'I wanted to go to the particular place I visited,' (a clear pull factor, placed in top three by 59%). Next, 'I want to experience a new culture' (38%), 'I want to relax' (36%), and 'I want to try new things' (31%), were all each chosen as top factors by roughly one-third of Millennials (see figures 1A and 1B). Requiring a break from daily routine or targeting a specifically-desired destination are more practical (and less whimsical) than expected, showing that the Millennials, while adventurous, curious about new things, and open to some degree of spontaneity, are still pragmatic, straightforward, and know what they want.

Nearly all TOs generally seem to believe that Gen Y's top motivations were a desire to try new things, followed by experiencing a new culture, with just over half guessing that a break from daily routine was important. Therefore, it seems that Millennials are more similar to older generations than previously thought – the daily grind gets to them as it also gets to Generation X and Baby Boomers – they work hard and eventually, a break is required. They visit a place simply because they want to visit it, which seems logical, but not what most businesses expect from Millennials. While self-described as spontaneous and adventurous, many Millennials are also covertly pragmatic – a break from the popular view of them. Of course, there may be other factors at play going unnoticed: seeing photos of the destination on Facebook or Instagram, or seeing the destination in well-known films and series such as Harry Potter and Game of Thrones, or even reading about the destination in a book, article, magazine or email newsletters, all with the possibility to create a desire to visit the destination – and all subconsciously affecting the Millennial's choice in destination. Yet, however interesting, this is a topic to be answered in another paper. Suffice it to say that Millennials (think) they know what they want, and will do their own research because they, like all working adults, need a break from the stress that is employment, and they go exactly where they want to go.

As for marketing, even though the interviewed TOs operate primarily in the adventure/sustainable/eco-tourism sphere, it seems many Millennials do not know this. Therefore, TOs need to better market themselves as the *opposite* of mass tourism operators – making sure Millennials realise that purchasing a trip provides them with adventurous activities, authentic experiences, and genuine interaction with other people, both young travellers and local people. Working with well-known travel photography Instagram story-tellers to share images of your destinations, and considering the addition of these story-tellers during travel on any FAM trips created by TOs could be another marketing technique that will convince Millennials about the authentic, interesting, and adventurous nature of their trips.

D. Planning Preferences and Behaviour

One must first understand their behaviour in order to create, market and sell a product to a certain client, or else your product will go unsold. The sections below explore how Millennials get inspired, when the book, choose a type of destination/trip, and what would make them consider buying a trip from a TO.

D.1 – Travel Inspirations

Moving on, the next section studies Gen Y's travel-planning preferences. TOs place recommendations by friends above all else. In fact, so confident of this were responding operators that 53% rate this a 'Most important' factor, and the rest of the TOs said 'Somewhat important' – and not a single person voted it less than somewhat important. Social media was deemed important, notably, Facebook (33% 'Most important' and 34% 'Somewhat important'), Instagram (33% 'Most important' and 30% 'Somewhat important') and personal blogs (28% 'Most important' and 40% 'Somewhat important'). Reading about it online was also chosen by many TOs – 36% rated it as a 'Most important' factor, and 47% say it is 'Somewhat important.' A high number of TO respondents (64%) say that 'They learned a friend went there so they decided to go' is 'Somewhat important' for Millennials. Most TOs believe that reading about a destination in an official guidebook is 'Not important' or 'Remotely important' (17%/31%). For other social media, 33% think that Twitter is 'Somewhat important,' and 20% think that Pintrest is 'Somewhat important.' A massive 47% say contacting a travel agency is 'Not important' to Millennial travellers (see figures 3A and 3B).

For Millennials, the top choice rated as 'Most Important' was actually 'Targeted online research' (34% 'Most important,' 45% 'Important'). Many also rated 'A friend recommended the place to me' (48% 'Important'), 'I read about it online' (44% 'Important'), 'A family member recommended it' (40%), and 'I heard about a friend's trip' (38%) as 'Important.' Social media such as SnapChat (71%), Twitter (62%) or Pintrest (50%) were ranked overwhelmingly as 'Not Important.' Instagram was surprisingly low on the spectrum (41% 'Not Important' with 20% Neutral and 18% 'Somewhat important), and Facebook earned roughly 25% of the vote for every option below 'Most important' (see figures 3A and 3B). Even Instagram and Facebook, the most important social media portals, were rated lower than expected by Millennials, and respondents were divided on their importance, proving that both platforms are used differently by Millennials users, instead of the common stereotype of universal addiction that is currently widely accepted. Based on this, I conclude that Millennials actually put more emphasis on word-of-mouth and personal recommendations, as well as direct, targeted Internet searches, rather than on random followers of social media or the anonymity of untargeted, non-demanded information found 'by accident' on the Internet.

Once again, it seems that Millennials are more pragmatic than society gives them credit – instead of waiting for inspiration to come their way or responding directly to classic marketing and advertising techniques, when a Millennial wants to go on holiday, they do targeted research to make the holiday *they desire* become a reality. Trust in friend and family recommendations are important rather than unknown social media followers. This represents a gap in the idea that TOs have regarding Millennials as 'tech-savvy' and 'whimsical;' Millennials may be more connected, so to speak, than previous generations, but they are not ruled by technology (or so they say). Most have jobs, and they manage their lives in a (somewhat) practical and orderly fashion – and this appears to be how many approach travel. They know how to have fun, but they are not swayed by the Internet's anonymity – they know what they want and how to get it.

D.2 – Travel-Planning Timelines and Behaviour

As for timing, almost all TOs (78%) imagine that Millennial travellers make their travel arrangements 1 – 3 months before their trip, which is on par with the Millennials, of whom 56% plan their trips 'One to three months in advance.' Planning a trip with less than one month of advance is the case for 23% of Millennials, though only 11% of TOs realise this.

The planning period afforded fewer gaps than in other areas of this survey. The majority of both groups seem to agree that the 'magic number' is one to three months before – the period where TOs can target the highest number of Millennials. It is true that slightly more Millennials are willing to plan last-minute trips than TOs imagine, although whether these 'improvised' trips are likely to involve a TO or not is another question.

Still on the subject of planning, TOs seem to think that Millennials 'Plan the major destinations/transportation/accommodation in advance and have a general idea of what they'd like to do each day but still leave some freedom for decisions on the go,' as 59% chose this option, while 18% voted for total or partial improvisation during their trip.

Here, again, Millennials and TOs are in agreement: the majority of Millennials – 56% – prefer to 'Plan the major destinations/transportation/accommodation in advance and have a general idea of what they'd like to do each day but still leave some freedom for decisions on the go.' This complements the above question – Millennials aren't as spontaneous as expected. These responses support the idea that Millennials enjoy some spontaneity but only when it is married with pragmatism; total spontaneity garnered only 3% of the vote, while totally planned won only 4%. In the words of one Millennial: 'I'd need some flexibility, not everything should be planned.' I think it is safe to say that this expresses the Millennial sentiment.

Therefore, to attract Millennials as clients, TOs must continue to plan the general structure of their itineraries but be sure to leave some of the trip elements and planning to improvisation. This could be leaving certain days or parts of certain days free, allowing Millennial guests to fill these moments with activities that strike them as interesting. Another idea could be that guests get to chose from a variety of extensions, or even be allowed to design their *own* extensions. TOs can even do more tailor-made trips, i.e. guests work with TOs to design the whole trip, or in some cases, Millennial guests can design just part of the trip – this way, it is easier for the TOs, it is cheaper for the Millennials, and the guests feel as if they are part of the trip while still not having to do all the heavy lifting of planning a complex trip abroad.

D.3 – Usage of Tour Operators and/or Guides

An important question for TOs – What would make a Millennial traveller consider using a TO? The number one reason – put in the top three by 55% – is that Millennials would ‘Feel safer travelling with an operator in certain destinations,’ closely followed by ‘They rely on a tour operator’s expertise to see “off-the-beaten-path” places’ (50%). One-third say a Millennial’s top reason to invest in a TO is because they ‘Rely on the operator’s expertise to see the best of the destination,’ while a further third of respondents quote a lack of time as a Millennial’s top reason for going to an operator. In the ‘Comments’ section, one respondent hypothesises that Millennials ‘Rely on social media and internet searches to plan and buy, and when they do contact an operator, it will be a local company instead of an agency in their home country.’

Millennials’ expectations concur, with ‘I feel safer travelling with an operator in certain destinations’ voted in the top three reasons 46% of the time. The second and third reasons were tied at 31%: ‘It is easier than planning on my own’ and ‘I rely on their expertise to see an “off-the-beaten-path” side of the place.’ A pattern emerged in the ‘Comments’ section: Respondents claimed that for the most part, they wouldn't mind using an operator, but they still need ‘some flexibility’ or the ability to ‘do the research themselves.’ Others worried that tour operators wouldn't provide a ‘unique experience’ that ‘offers a vacation that matches my style, not sightseeing or tourist attractions.’ One mentioned cost as a factor. It seems that, much like the definition of travel itself, there are many misconceptions of what tour operators do and even who they are. But it is evident that a 100% planned trip is not a reason most Millennials are willing to pay for a professional – and that Millennials are less spontaneous and happy-go-lucky than acknowledged.

This survey brings to light the idea that Millennials are more pragmatic than stereotypes would admit, as safety in certain destinations is their top reason for investing in a TO, as well as in choice of destination and length of stay. Despite being self-described lovers of spontaneity, adventure, and curiosity, a principle reason for consideration in booking a TO is its facility, once again, overturning stereotypes. Pragmatism does indeed exist in this generation.

D.4 – Choice of Destination

Pertaining to the types of destinations Millennials choose, 48% of TOs believe that Millennials are ‘Most likely’ to choose urban destinations (big city is specified), while a further 40% rate urban destinations as ‘Likely.’ The beach was the second top-rated answer – a combined 78% chose the beach as either ‘Most likely’ or ‘Likely.’ The response, ‘Mountains, lakes, glaciers, and/or forests’ was chosen by 46% of TOs to be ‘Likely,’ and 40% to be ‘Most likely.’ National parks and the countryside were largely rated ‘Neutral.’

When asked where they preferred to travel, ‘Mountains, lakes, glaciers, and/or forests’ was rated as the ‘Most likely’ by roughly half of the Millennials (with additional 37% who chose ‘Likely’). ‘Small urban destination,’ ‘Countryside,’ ‘National parks,’ ‘Beaches’ and ‘Urban destinations – big cities,’ were all universally rated largely ‘Likely’ by 35 – 50% of respondents. In fact, of all choices, only ‘deserts’ were largely rated ‘Only in rare cases,’ or ‘Not likely.’ Therefore, Millennials generally give high scores to most destination types – meaning that nature is as important to them as urban destinations.

Both groups proclaim 'Mountains, lakes, forests and/or glaciers,' 'Beaches' and 'Urban large cities' as the three top-rated destinations for Millennials, though TOs placed in the reverse order as Millennials. Beaches are not described, though I think it is safe to say that in most cases, respondents are thinking of mass tourism. Clearly however, being in nature is important to this group of people. As they mature (and save money) – all the while keeping in mind that adventure, authenticity, open-mindedness, spontaneity, and meeting locals is important to them – Millennials will logically graduate from participating in local active day trips to craving longer itineraries and far-away destinations, while still keeping the same state of mind and *esprit d'aventure*. On the surface, 'Urban cities' seems like a strange match for adventure travel TOs. However, this is not the case. For foreign visitors, it is usually easier (and therefore more attractive) to choose tours that start from accessible places. If, for example, a client wanted to bike through Provenance (France), but lives in Florida, it is easier to start from Nice (meeting the guide or operator before driving to the start of the cycling trail) than ask guests to convey themselves directly to the tiny village at the trailhead. TOs can provide a 'cultural tour of Nice to start the trip' before bringing guests to the true starting point. Keep in mind as well that 'heritage and cultural immersion' is one of the three components that make up adventure tourism. On another line of thought, and remembering that Millennials book last minute, selling tours that commence from big cities can also be a way to acquire Millennial tourists who have already booked their tickets to visit Nice (with the intention of visiting the region), and who may be searching last-minute for things to do. This would work especially well with short itineraries designed for younger travellers.

E. Travel Activity Preferences

The next section incorporates a series of four questions, which involves rating the likeliness of Millennials to try various cultural, active, entertainment and do-good (or 'make an impact') activities, with the goal of comparing them to the Millennial responders responses on their actual willingness to try the listed activities.

E.1 – Travel Activity Preferences – Cultural Experiences

For the first question, which pertains to cultural activities, 'Sampling local gastronomy' was chosen as 'Most likely' by the highest number of TOs (44%, plus 41% claiming 'Likely.') 'Going to a music or arts festival' was the second top-ranked, chosen as 'Most likely' by 31%, with a further 42% saying 'Likely.' 50% of TO respondents ranked 'Visiting local markets' as 'Likely,' with 40% claiming 'Sightseeing' as 'Likely.' With 12% of the vote, 'Learning traditional music/dance' was the highest ranked for 'Not likely at all' (see figures 4A and 4B).

'Sampling local gastronomy' was overwhelmingly voted (67%) 'Most Likely to try it' by Millennials – yet 43% still voted that they were 'Most Likely' to go 'Sightseeing to visit top sites,' which is more in line with mass tourism. Over two-thirds of respondents said they would be 'Likely' or 'Most likely' to 'Visit local markets' and one-half ranked they'd be 'Likely' or 'Most likely' to 'Go to a music or arts festival.' It is interesting to note that while gastronomy and local markets are important to Millennials, learning how to make local foods or learn traditional dance was ranked low, with 21% and 20% ranking them as 'Not likely' respectively, despite the perceived idea on the Millennial interest in learning and education in connection with travel (see figures 4A and 4B).

Food is important – Millennials freely admit this, and TOs seem to have figured this out already, as both placed this as the top 'Most important'. In general, most TOs already seem to 'get' this – local gastronomy plays an important role in most tours. In order to attract the Millennials, TOs need to simply keep this 'fresh' – i.e., they need to keeping innovating their culinary experiences for guests. The goal of TOs is to let their Millennial guests go home being able to brag, 'You wont believe what/where/how I ate!' Cooking lessons, homestays with locals, meals in family-owned restaurants, meeting the chef of the restaurant, visiting food markets, eating at local farms, having picnics with dramatic views, wine/beer tasting, sampling unusual dishes, going to vineyards, introducing guests to unusual traditions or even acquiring some of the ingredients themselves (such as mushroom-picking, fruit-plucking, fishing, or searching for local herbs) are all examples of ways TOs can innovate their guest's gastronomy experience. Visiting local markets in particular is a good way to please Millennials guests, as this was the third top-rated experience.

Sightseeing also appeals to many Gen Y travellers – though only 19% of TOs think so. It was mentioned a few times in the 'Comments' section that Millennials likes to "Tick off all the boxes," "Put pins on a map," and have the "'Fear of missing out' [FOMO] syndrome." They do not want to be simply picked up at the airport and driven away to their cycling destination an hour away; Millennials want to say they 'saw' it all. TOs should be prepared to show guests both off-the-beaten-path places as well as the top sights, especially if they are first-time visitors. Imagine, for example, visiting Paris without gazing upon the Eiffel Tower, County Claire without walking atop the Cliffs of Moher, Norway without a single fjord, or Bavaria without a stop in famed Munich and the fairy tale Neuschwanstein Castle – regardless of the fact that these sights are on most travel itineraries, it is hard to imagine returning home and admitting you did not see the famed landmark despite the close proximity to it. TOs should keep this in mind as well.

E.2 – Travel Activity Preferences – Physical Activities

Continuing with the same strain of question to comprehend TO perspectives, the focus now turns to rating 19 physical/active experiences. 'Hiking (short scale)' earned the most votes for 'Most likely' – 43% (additional 45% rating it as 'Likely'), with 'Short distance cycling' winning 25% 'Most likely' and '45% 'Likely.' Snowboarding came in third place, with a combined 67% choosing it as 'Likely' or 'Most likely.' Canoeing/kayaking did well – 53% marking it as an activity 'Likely' to be tried by Millennials (plus 20% 'Most likely). Skiing received 48% for 'Likely.' Long-distance cycling, snowshoeing, spelunking, Via Ferrata, skydiving, paragliding, and bungee jumping all fared the worst, each claiming at least 30% of TO votes as something Millennials would try only in rare cases (see figures 5A and 5B).

Nearly half (41%) of Millennial respondents rated they would 'Most likely' try 'Hiking – short distance' (and 36% more claiming 'Likely'), followed by skiing and scuba diving (tied at 20%). Bungee jumping, long distance cycling, snowboarding, and skydiving were worst-rated, with 49%, 48%, 48% and 42% respectively who admit they were 'Not likely at all' to try these activities. Many activities were rated 'Likely' – canoeing/kayaking (30%), short distance cycling (26%) and trekking (25%), or 'Neutral' – such as the case with Via Ferrata, canyoning, zip-lining, paragliding, and water-skiing. 'Mainstream' activities such as short-distance hiking or cycling, canoeing, kayaking and diving, as well as neutral opinions on sports with a little more adrenaline thrill such as canyoning, paragliding or zip-lining, seem to win out over the high-thrill activities such as bungee jumping or skydiving (see figures 5A and 5B). Despite a self-proclaimed adventurousness, it seems Millennials are ready for adventure in more in theory; in practice, they prefer less technical, less thrilling, less dangerous or risky activities.

Noting the gap between what Millennials say ('I am looking for adventure') to what activities they chose ('mainstream' or 'soft adventures' with less risk involved), a possible solution for TOs is to propose more one-, two- or three-day hiking trips to fantastic locations near places of interest to Millennials. Montpellier is near the Cevennes – imagine a long weekend spent in Montpellier with a guide service that takes Millennial hikers to the mountains to explore the natural beauty, eating at a local farmhouse, and allowing Millennial guests to 'plan' part of the trip (i.e. chose from a few options of sites to visit or routes to take). Sleeping, too, could be left up to guests – with the option to sleep under the stars, stay in a small B&B, or curl up in a quaint gite. In the same way that TOs could propose shortened versions of their hiking trips, they could also do the same for kayaking, canoeing and other water sports. A visitor to places with a river like the chateaus of the Loire Valley or a coastline like Bilbao along the Costa Verde could potentially do a one-day kayak expedition during their trip, perhaps visiting rural villages, beautiful castles, stunning scenery, exemplary ruins or magnificent mountains – not to mention interact with local people and view flora and fauna in their natural habitat. This example exhibits all the appearance of adventure and perceived thrills with minimal actual risk involved. Lastly, scuba diving is a great way to capitalise on Millennials visiting beaches but who desire more than a simple 'beach holiday.' While hard-core divers will go out of their way to visit a well-known diving site, others may simply decide to dive (or snorkel if not certified) in order to mix beachside relaxation with perceived adventure and a unique way to interact with the destination.

E.3 – Travel Activity Preferences – Entertainment and Social Activities

As for entertainment and relaxation activities undertaken by Millennials, 94% of TO respondents think that Millennials are likely to both 'Go to bars and dance clubs' while travelling, as well as 'Go to music concerts.' Attending social events was chosen by a further 68% of TOs, and 'Shopping' by 54%. Sporting events won 45%, and spas/massage equalled 37%. Yoga, theatre performances and going to the cinema were the lowest-ranked activities (see figure 6A and6B).

Not surprisingly, when Millennials were asked for their preferred social and entertainment activities while travelling, 71% of respondents said they were 'Likely' or 'Most likely' to go to a bar or dance club. Music concerts, musical or theatre performances, and frequenting social events (parties, cocktails, etc.) were all popular – 65%, 60%, 58% choosing 'Likely' or 'Most likely,' respectively. Shopping scored high on the 'Likely' choice (40%), though lower on 'Most Likely' (25%) – most likely accounting for gender differences. Yoga (44%), the cinema (31%), and sports matches (21%) fared the worst – the percentages here represent the number of survey respondents who chose these as 'Not likely at all.' Well-being (spa, massage) also scored very low (see figure 6A and6B). Clearly, Millennials are social creatures even while travelling.

Going to bars and dance clubs was the highest rated entertainment activity for both. This is to be expected, and is already an established fact about this generation. It seems that over 90% of TOs also rate Millennials as likely to go to music concerts as well – compared with only half of the

Millennials. Going to social events such as parties rates third for both, but once again, the percentages differ – 68% TOs think this is very likely compared with 27% of Millennials (additional 31% saying 'Likely.') Shopping is the fourth activity for both, and here, the percentages start to align. While the order is the same, TOs have over-estimated the numbers. It is clear that not all Millennials think alike. Many do seem to want to appreciate bars and nightlife as well as musical events, but not all. This is perhaps due to the solid 22% that claims travelling alone is 'Most preferable' or 'Preferable' – going to the bar or concert alone is neither fun nor safe in most cases. Another speculation: it may account for the older portion of Millennials that already have their first child – or even simply travellers who do not see the value of spending all night out (perhaps in order to wake up earlier). Cost could be another reason for this – many Millennials state cost as a decision-making factor, and it is already established that they are expert at prioritizing – perhaps parties, clubs, concerts and shopping are factored out based largely on their price tag. At any rate, the reasons for this are only speculation, and further research would be required.

In any case, it seems that while including bars and concerts in itineraries should be important, there should be other choices for those who are not interested. The same can be said of social events and shopping. While important to either include as an option on trips or simply give free time to guests and inform them of local events and shopping spots (both local products and shopping centres), that should be all that these activities are judging by the statistics – just options. Millennials will appreciate the fact that they have some 'control' over the planning, some improvisation is possible, and those interested can get their moment in the social limelight. The use local guides – Millennials enjoy supporting the local community – who are not only experts in their fields, but also good at and confortable with talking, sharing, and connecting with guests will make sure Millennials feel that they came away 'learning' something about the destination's culture, nature, history, language or people through a sort of 'osmosis' or absorption process, as well as contribute to the social aspect of the trip.

E.4 – Travel Activity Preferences – 'Making an Impact' Activities

Millennials are known to 'want to make an impact.' Asked to judge the likeliness of Millennials to engage in various activities, TOs tie a Millennials' likeliness to 'Volunteer' and 'Do a working holiday' at 73% each. Teaching abroad was third, with 58% of TOs believing Millennials likely to travel and teach. Only 5% think Millennials would not be willing to engage in any.

Out of cultural, active and entertainment activities, 'make an impact' activities were by far the least popular. The highest ranked was teaching abroad, yet even this choice only won a mere 13% 'Most likely,' and 24% 'Likely' – with 27% who say they are 'Not likely at all.' In fact, all choices (teaching abroad, working holiday, volunteering, and donating) all scored between 25% and 27% for 'Not likely at all.' Plainly, it is only a small group of Millennials leading the way to make a difference while travelling.

Supposedly famous for 'making a difference,' the data revels that once again, stereotypes are erred. Not everyone has the time, ability, family situation or financials to do these types of activities. Teaching abroad was most popular with Millennials – yet, it came in third place as voted by TOs. In second place (the same ranking as the TOs speculated), taking a working holiday potentially interests about a third of Millennials. These types of holidays are harder for many TOs to organise, but TOs may work with the volunteer placement organisations, providing itineraries for volunteers to visit their adoptive region while on assignment. In general, this type of tourists would hold adventure/responsible/sustainable tourism in a very high regard, and therefore more likely to pay for tours with adventure companies, if the proper advertising is used. These trips improves the volunteer's knowledge of and experience in the destination, and provides a new, ready-made source of clients with a high turnover rate (as volunteers are always coming and going).

E.5 – Travel Activity Preferences – 'Alternative' Travel Methods

As for new or unusual methods of travel, TOs were asked to estimate a Millennial's willingness to try certain types of 'alternative' travel. Home-sharing (i.e. Airbnb) and budget airlines were the clear winners (82% and 79%). Afterwards followed ride-sharing and voluntouring at 58% and 55%. Earning roughly 40% were a working holiday (48%), Couchsurfing (44%), cycling holidays (41%), and long distance walking holidays (41%) (see figure 12A and 12B).

Millennials too were asked if they have tried, would be willing to try, or are not willing to try several alternative forms of travel. Most popular was budget airlines, with 79% of respondents who have already tried, and another 16% that would be willing to try. Ride-sharing (BlaBlaCar, Uber, etc.) has been tried by 59% with an additional 24% who would be willing to use such a service. Home-sharing was also quite popular – 56% have already done it and 33% are willing to do so. These are activities usually considered relatively low-risk. The higher-risk activities such as hitchhiking or Couchsurfing had a high number of people unwilling to try (59% and 48% respectively). The more arduous physical activities such as long-distance cycling or long-distance walking each reported high numbers of those unwilling to attempt (50%/36% unwilling, respectively). Voluntouring was the highest rated 'Haven't tried but am willing to try' with 61% of Millennials ready to give it a go (see figure 12A and 12B).

Millennials are open to some alternative means of travel, though not all. Budget airlines, home-sharing and ride-sharing are the highest attempted, with most of the rest willing to try even if they hadn't already done so. Less people have tried staying with a host family, voluntouring or taking a working holiday, but the majority of the people would be willing to try these activities. Evidently safety is still on the Millennial mind, as activities traditionally regarded as 'unsafe' (i.e. Couchsurfing, Hitchhiking) were largely voted against. TOs rated home-sharing, ride-sharing, budget airlines, voluntouring and taking a working holiday as the most likely activities Millennials would be willing to try (each earning at least 50% of the vote). Couchsurfing was earned just under 50% – a discrepancy with what the Millennials admitted. Staying with a host family was also at the bottom – clearly, TOs do not think that Millennials would want to share a roof with others. While the activities that match up between the two groups represent a piece of solid common ground, there is room for improvement. Homestays are more popular (or potentially more popular) then operators realise – and could be incorporated into itineraries. Airbnbs or similar arrangements could be used in certain itineraries also, to provide guests with a better 'local flavour' of the destination, and the feeling that they are 'part of the community.' Long distance hiking or cycling is still relatively low on most Millennials' radar, but there is still roughly 40% that would be willing to try this sort of activity. This is a potential area to grow, especially if combined with the authenticity of the destination, and marketed as a way for

Millennials to have a unique experience off-the-beaten-path. Starting small – shorter, simpler, and cheaper itineraries with a high amount of cultural immersion – seems the best way to break into this emerging market.

F. Choice to Use Tour Operators or Guides

Obviously, the TO's goal is to sell trips. If they were to start marketing trips at a higher rate to Millennials, what would make this generation consider paying for a TO?

F.1 – Type of Trip Bought by Millennials

Important to understand for TOs is what would tempt a Millennial to purchase a guided tour. When asked, TOs responded that 'Guided active experiences' (27% voted 'Most likely,' and 44% voted 'Likely') would tempt Millennials the most. Day trips acquired a combined 51% of TOs who thought it 'Likely' or 'Most likely,' and 'Guided cultural experiences' were largely awarded 'Neutral' (see figure 7A and 7B).

When it comes to purchasing tours, 'Guided day trips' are by far the most popular and important to Millennial consumers, with 46% responding 'Yes, I have purchased' during recent travels, with an additional 18% responding, 'No, but I would consider purchasing.' For 'Guided active experiences,' one can see the difference between the types of travellers: 26% responded 'Yes,' 40% said 'No' yet 32% said 'No, but I would consider purchasing.' Millennials, it seems once again, are not all the same. Interestingly, all-inclusive package holidays were not attractive for Millennials – only 18% had already purchased, with 65% who had not. Roughly 50% of Millennials reported that they had or would consider purchasing a 'Guided cultural experience.' Private tours are not the lap of luxury for Millennials – 70% admitted they hadn't purchased (and didn't plan to purchase in the future) any kind of private tours (see figure 7A and 7B).

Nearly half of all responding Millennials have purchased a guided day trip while on holiday, with an additional fifth saying they would consider purchasing. A mere quarter of Millennials have already purchased guided active experiences, with another third that would consider doing so. Interestingly, TOs rated guided active experiences above guided day trips, and by a considerable margin. Judging by responses chosen and the comments left, guided day trips seem to be more attractive to Millennials for several reasons. One, perhaps certain Millennials are more adventurous and active than others. A second reason could be simply lack of (or perceived lack of) budget. According to the comments, Gen Y is also worried that purchasing a guided tour does not provide a unique enough experience. A fourth reason is their distrust of anything too mainstream (instead searching for a chance to prove they are unique and authentic) and group tours seem too constricting and on-the-beaten-path for them. Lastly, Millennials like some degree of planning but too much isn't appealing either (some flexibility and choice is preferred) – but often, guided trips seem too planned. Day trips are cheaper and shorter, there more flexible, and Millennials can still plan the rest of the trip themselves. It could be a good idea for TOs to provide day trips as a way to get Millennials 'hooked' on adventure, so to speak, creating loyal customers. Therefore, TOs should invest in day trips in addition to guided active tours – with cultural elements included in both.

A follow up to this question asked for Millennials to report tours purchased or considered for purchase. The trend seems to be that cultural tours and active/physical tours are the most preferred. Top reasons include ‘An experience I cannot create myself or need an expert for’ or ‘Using local guides to learn something while at the same time supporting the local economy.’ The more remote or exotic the destination is compared to their home culture, the more likely the Millennial will consider booking a guide or guided tour (perhaps tying into the ‘safety’ factor mentioned above). Gen Y seems to prefer guided tours of both local cultural sites: architecture, wine tasting, tours of cities and/or museums, historical sites, as well as searching for ‘adventurous activities they can’t do anywhere else.’

In fact, in the comments section of the second part of this question, many respondents mentioned that they paid for or have considered paying for guided trips (mostly day trips) because they were interested in learning about the history or culture of the destination, or because special expertise was needed. A few mentioned that transportation was an issue (which is why they purchased a guided trip), or that the activity was something difficult to do anywhere else or simply something difficult to organise by themselves. A few did not like the idea of a guided trip at all. All of these are unique selling points of adventure operators that TOs need to be pushing in order to convince Millennial customers that they should, in fact, pay for a TO instead of attempting to do it all themselves. TOs need to convince Millennials that they can give Gen Y consumers a unique, educational experience they can’t get elsewhere, and the TO will do all the work (organization, transportation) for the client, while still providing the client with the ability to modify or add elements of the tour themselves.

F.2 – Motivations for Purchasing a Trip

Therefore, what would make a Millennial willing to purchase a tour? 75% of TOs think that ‘It is an interesting experience that Millennials cannot design on their own’ rates among top Millennial motivations. This is followed by ‘It is an off-the-beaten-path experience’ and ‘It gives them a true local perspective,’ both at 69%. These are followed just after by ‘They feel safer to be with a guide in particular destination ns’ (66%) (see figure 8A and 8B). Only 2% think Millennials would never use a guide/agency/TO.

It’s safe to conclude that the top rated reasons a Millennial would consider buying a tour is that ‘It is an interesting experience I cannot design on my own,’ (77% noted this as top reason), and ‘It gives me a true “local” perspective,’ (with 70% choosing this). 52% of voters chose ‘It’s an off-the-beaten-path experience’ as the third reason they would pay for a tour, and for 50%, safety was a top reason for purchasing. This compares to those who marked ‘I do not have time to plan’ (20%) and ‘I would never use an agency/guide’ (8%) (see figure 8A and 8B). Visibly, many Millennials are ready to pay for some experiences – but these experiences must meet their criteria, and they must have the budget to purchase what they want.

TOs agree that they think Millennials will purchase tours from a TO in order to get an interesting experience they cannot design by themselves – as well as get a true, local perspective on the destination. Roughly half of both groups agree that Millennials would consider purchasing a tour because they would feel safer with a guide. It seems that on this issue, there are no real gaps – Millennials and TOs are on the same page. TOs should simply continue to understand the Millennial point of view, and do their best to continue designing complex, multi-faceted experiences in lesser-known destinations, making sure guests will get a local perspective while also providing a metaphorical safety net when needed.

Innovation is also vital. To capture Millennials, TOs should continue thinking of new ways to innovate, to give guests a ‘Goosebumps experience,’ to engage these clients through their senses and feelings. Concrete examples of such Millennial-friendly innovation may include: Cliffside picnics overlooking a valley or gorge, use of virtual apps to show how a place once looked, allowing guests to help ‘clean up’ a nature spot or clear trails (to help them better connect with the destination), having dinner with a local family in a village, incorporate a scavenger hunt (real life or virtual – geocaching is an option), incorporate a surprise element to keep guests on their toes and excited, or bring guests to a local concert during the evening’s meal.

Also important based on many Millennial comments, TOs should avoid global chains – Millennials want experience the local life and aid the local economy. They do not need total luxury but using semi-luxurious and authentic homestays, local B&Bs, guesthouses, gites, local hotels, farmhouses, castles or manors, etc. when possible will not only make the guest feel special, but also that they are receiving the authentic adventure and Goosebumps experience they so crave.

G. Technology and Social Media

Millennials are thought to be tech gurus, but is this true? The following studies the Millennial Generation’s interactions, perceptions and opinions towards technology.

G.1 – Technology: Apps

There was very little variety in responses to the open-ended question asking for the three most popular apps used while travelling: 35% voted for Facebook, 22% for Instagram, 15% for Google Maps, and 12% for TripAdvisor. The rest of the votes were scattered over Twitter, Airbnb, SnapChat, and others (see figure 9A and 9B).

For Millennials, Google Maps gained 35% of the vote as ‘Apps/digital tools most likely to use when travelling.’ As paper maps slowly become out-dated, a surge of interest in Google Maps is to be expected. 24% of respondents rated TripAdvisor (TA) as one of their top three apps. 19% confirm that Facebook is an important app for travel, while Instagram only won 13%. Google itself is at 12%, with Yelp receiving a mere 10%. Other apps such as Airbnb, Skyscanner, Uber and Google Translate were all mentioned but received only a marginal percentage of the vote (see figure 9A and 9B). Important to note: it was an open-ended question, allowing three boxes for responses according to the respondent’s opinion.

When it comes to the most-used apps for travel, even though the answers were limitless in this open-ended question, Millennials aren’t terribly complicated. This generation is known to be tech lords, yet top-used apps are simple and practical: Google Maps, TripAdvisor, Facebook, Instagram and Google (as a search engine). Even the marginal mentions are simple: Airbnb, Skyscanner, Uber, and Google Translate. TOs predicted that the most frequented apps would be Facebook, Instagram, Google Maps and TripAdvisor, with honourable mentions being Twitter, Airbnb and SnapChat. What comes to light from this analysis is simply that TOs assume that

Millennials use social media more than Millennials actually admit to using. On both fronts, TripAdvisor seems important. It is present in all three parts of the trip – the planning (i.e. choosing accommodation or day trips, etc.), during the trip (deciding of on-the-spot items, such as restaurants or nearby attractions), and afterwards (when clients leave their own reviews). TOs need to continue innovating to merit a positive review, as well as and reminding guests to leave a review (via a follow up email, or their Facebook page). Facebook/Instagram are certainly valuable tools both for initial inspiration and the sharing photos afterwards (i.e. creating more inspiration to other travellers and completing the circle). Due to Twitter's low ranking, TOs should concentrate more time and energy on the more fruitful platforms (i.e. Facebook and Instagram). Through the high ranking of Google Maps, Gen Y's practicality shines through again. In an obvious statement, TOs should be sure all of their information is up-to-date, along with regular updates on their Facebook pages and Instagram sites.

G.2 – Technology: Top Needs While Travelling

Another relevant question about technology is the most important technological needs for Gen Y while travelling. When asked to choose their top three needs, TOs rate access to free Wi-Fi as a must (88%), as is the ability to charge phones and tablets (72%). Ability to use localisation apps comes in third, at 39%, with mobile friendly sites just behind (33%). Access to fast Wi-Fi, reservation apps, sharing apps, and the ability to have mobile tickets all appeared in the TOs' top three less than 30% of the time (see figure 11A and 11B).

'Access to free Wi-Fi' is hands down the winner, with 92% of Millennial respondents naming it as one of their top three tech needs. The ability to charge a phone and/or tablet is also highly important for this generation, with 77% ranking it among their top three choices. 40% rank localisation apps among their chosen three, while only 22% chose 'Mobile friendly websites.' Reservation apps, mobile tickets, access to fast (even if not free) Wi-Fi, and sharing apps all each earned 20% or less (see figure 11A and 11B).

It is generally accepted that Millennials are the poster child of new technology, and that technology is a very important factor in their lives – a common vision of this generation is the Millennial with a Smartphones glued to his/her hands. So, what are the most important technological needs of this generation? Nearly all of both groups say free Wi-Fi is indispensible, as is the ability to charge mobile devices. A smaller (but still important) percentage say that localisation apps are also important. Mobile-friendly websites were chosen by only one-third of respondents, but it is safe to say that this is also a necessary aspect for operators. TOs chose the same top four choices and in the same order, though the percentages were slightly lower. Therefore, there is not a cavernous gap in perception in this category. It is simply necessary that TOs follow up on these four aspects, providing free Wi-Fi to all guests, plenty of plugs, localisation apps, and mobile-friendly websites. It is also worth noting that TOs could better their service by renting or selling adapters and external batteries (to charge devices in the nature when no plug is available) to those who may have forgotten them. Bringing along a Wi-Fi hotspot when outdoors (and charging a small fee for usage if guests decide they want to stay connected) is also a way to keep clients happy and able to post/connect with family and friends back home. This also plays into the safety aspect Millennials referred to above (by letting loved ones know that they are safe). It goes without saying that TOs need to make sure their technology is constantly up-to-date: no glitches, plenty of places to charge phones/tablets, great photo/selfie ops for posting, and ways to bring cameras/phones even when doing extreme activities (dry bags, go-pros, special pockets, etc.).

G.3 – Social Media: Most Important Platforms

Pertaining to social media for travel use, 51% of TOs consider Instagram as the most important platform (additional 57% rating it 'Important'), followed by Facebook (48% 'Most important' and 40% 'Important). SnapChat and Twitter were voted third and fourth – 40%/37% respectively say they are 'Important.' No more 15% of TOs chose 'Not Important' or 'Only in rare cases' for any social media option (see figure 10A and 10B).

When asked what the most important social media sites are for travel needs amongst Millennials, Facebook was the clear leader, with 37% of Gen Y rating it as the most important, while 29% instead chose Instagram as top social media site. This is in contrast to personal blogs, Twitter, SnapChat and Pintrest, all of which earned between 61% to 75% of the vote as 'Not important at all' (see figure 10A and 10B). In the 'Comments' section, several Millennials even said they did not like to use social media while travelling (though from their responses, I garner that they did not consider their use of social media before or after their trip). One even mentioned their reasons for not posting as being too personal, causing jealousy, and potentially unsafe. Others prefer to stay disconnected while travelling, using text/email only as a security measure.

Comparing the TO perceptions with the Millennial results, there is a gap in the importance of social media for Millennials. It is true that Facebook and Instagram are the most relevant, but travellers do not perceive many other types of social media as relevant. This is an important gap to be addressed by TOs – it is better for TOs to spend their time, energy and money on developing the most used social media platforms for travel (which according to this study, are Facebook and Instagram), in an attempt to connect with and inspire more young travellers.

G.3 – Social Media: Posting Preferences

Most TOs seem to think Millennials post mainly during their trip (61%), or before, during and after (30%). Very few predict that Millennials prefer to post primarily after returning from their trip, and none think they prefer to post before their trip.

It seems a small majority prefer posting mainly after their trip (37%). Closely following at 33% are those who prefer to post mainly during their trip. Only 9% don't post at all. In the comments section, it shows that Millennials are divided, with some who say they rarely post and others who post all the time.

Most Millennials either post primarily after their trip (upon their return home), or during their trip. Two-thirds of TOs, however, believe that Millennials post primarily during their trip, and one-third think they post before, during and after, with only a marginal 5% who think that Millennials post about their travels largely upon their return. This gap in perception shows that TOs need to focus their energy more on the after sales service aspect. This can be done by making sure Millennial guests have the opportunity to take the best photos (which includes selfies) to be posted later, as a way to attract and /or inspire possible future guests. It is a good idea also to encourage guests to tag the TO's company page in the Facebook albums they publish or the TO's handle for the photos posted on Instagram. Creating a 'customer gallery' where guests can submit their best photo for inclusion in a collaborative photo gallery can make the adventure continue after the actual trip is finished. Another idea to consider is an Instagram competition for photos or videos in which guests can compete for the best photo (tagged using TO's handle) on a category provided by the TO, with the change to win a free trip. Practices such as this should help improve the TO's customer service, make customers feel more involved/connected with the TO even after the trip's conclusion (thereby increasing fidelity) and increase social media exposure, not to mention generating a lot more interest in the destination(s) with the sharing of magnificent photos/videos.

PART V: GENERAL CONCLUSION

A. Paper Topic

This paper was laid out in order to acknowledge the importance of the Millennial Generation in leisure travel as future consumers for European tour operators. From the initial research, it became clear that the Millennial search for adventure, authenticity and innovation, with interests in trying local gastronomy or interacting with local people was on par with the adventure tourism offer, and that tour operators within the sphere of adventure/responsible tourism were a good match for the Millennial Generation. Mass tourism industries are less interesting to the majority of today's Millennial tourists as they do not uphold the values desired by the majority of Millennials.

In the course of my research, I came across many details that I speculated were stereotypes and exaggerations – so, to avoid a generation-wide caricature, I therefore chose to study the gaps in perception between European adventure tour operators (purposely avoiding mass tourism) and the true expectations, desires and needs of Millennial tourists.

Despite most current clients of most TOs having an average age of 40 to 50 years old, this younger generation presents many new opportunities for them. European TO client bases are aging, and due to a reduction in mobility and financial resources not to mention an increase in family obligations (i.e. as they become grandparents), the importance of these aging generations will slowly decline. TOs will need to start searching for their replacements – and they will start looking at the Millennial Generation as such.

Millennials provide a good alternative: at a young age, they are ready to travel the world, they are interested in other cultures, they enjoy trying new things, and they love adventure. They have grown up with the idea that they can do anything, and go anywhere. The world is open to them, theirs to discover. In response to the question asking Millennials to mention a recent trip, the incredible breadth of responses was astonishing. From Australia's coastline to Poland's mountains to Italy's vineyards to Monte Carlo's luxury to France's landscapes to Bulgaria's ruggedness to New York's glam to studies in South Korea, Millennials discussed trips in all corners of the world. Also invigorating, the trips they took covered almost every possible type of trip: multi-country road trips, party holidays, volunteering, adventure tours such as hiking, cycling, kayaking, etc., family trips, honeymoons, Erasmus, educational tours, backcountry camping, luxury stays, beach holidays, remote cabins, skiing trips, and solo voyages, to name just some. Millennials will go anywhere if they think they will have a good time – they don't want to 'miss out' on anything.

B. Conclusion of Results and Overarching Trends

In some ways, TO perceptions and Millennial expectations were in alignment, but there were several identified gaps – providing TOs room for improvement in attracting this new market.

Though often described as adventure-lovers and thrill seekers, Millennials are more pragmatic than expected. Many are already employed and in serious relationships – with whom most prefer to travel with. They are budget conscious but not necessarily thrifty – they will pay for an experience that they think is worth it. They demand experiences that will provide them with a story to tell, leaving them with a connection to the destination visited. They do not wait for opportunities to come to them – in fact, they know what they want, and will instigate targeted searches for the information necessary. They are willing to pay for a TO because they believe that, in certain destinations or situations, this will mitigate risks and provide higher safety standards. Uniqueness, authenticity, and interaction are extremely important to them, and they will not consider booking with a TO if they do not think that they will get this type of experience.

And because they do have jobs and relationships and other obligations, and they are more practical than expected, the top reason for deciding to travel was a break from everyday routine. Just like other generations, they too need a break from daily lives and expect their holiday to be so full of excitement that they can live in the moment, forgetting about everyday stress and worries back home. This is not what many expect from the Millennials, but is on par with what is known about travel motivations for other generations.

However, many think that Millennials are selfish, looking only for bragging rights in order to 'measure' themselves against friends back home or followers on social media. While this may be true in some cases, the majority of the time, it is false – Millennials love to share their adventures with others (that's part of the fun) but bragging rights is not the main decision-making factor when planning a holiday – instead, the 'bragging' is merely a by-product of a combination of the traveller sharing on social media and their followers suffering from the 'Fear of missing out.' Mostly, they travel because they can – they enjoy learning, eating and sampling new things, and in this day and age, despite geopolitical or crime-related risks, the world has never been more easily accessible to travellers (though, in some ways it is closing slightly, in light of recent attacks, disease outbreaks and crisis situations). New innovations have made it become much easier to travel now – and Millennials aren't afraid to try many of them. Innovations such as Airbnb, BlaBlaCar, Ryan Air, EasyJet, Ouigo, Uber, Euro Lines and WizzAir have made travelling much easier and accessible. These 'alternative' options have also made Millennials feel as if they are acting 'like a local,' thereby increasing the pleasure they enjoy by partaking in these activities. Being budget conscious is also a significant factor.

To note also, while tech-savvy in ways that Generation X or the Baby Boomers could only dream of 30 years ago, Millennials aren't nearly as connected to their devices as common perception or TOs believe. This stereotype exists not because of the amount of posting that they do, but more so because growing up in the age of technology has made them so unbelievably *good* at it. They learn and adapt quickly, easily mastering new technology, and while they my have a high posting rate in their everyday lives, posting while travelling is less significant. It is important for them to have free Wi-Fi, outlets and mobile sites, but the reasons for this are more practical than social or selfish. Most travelling Millennials tend to use their devices as a GPS, to obtain important information or reassure their safety to friends/family rather than post to Instagram or other social media platforms. This is not to say that they don't post to Instagram – they do – but the majority wait until the trip is at its end. As for social media, TOs should forget about Twitter, Pintrest and SnapChat – the ‘classics’ Facebook and Instagram still dominate Millennial travel preferences and posts. An important caveat, Millennials expect instantaneity – if something (such as a website or booking platform) does not instantly function and provide ease in usage, the Millennial will simply leave the site in favour of one that does. Additionally, they expect real-time reporting with regularly uploaded photos and posts so they can follow along at home.

Interesting to note also is the lack of interest in volontouring, that is to say, volunteer tourism. The Millennial Generation is known for its ‘do-good’ attitude, and desire to make a difference. Many are intrigued by the concept, even admitting they would like to try it, but admit they are constrained by obligations (family, job, finances, education, pets, etc.). Therefore, based on this study’s results, those holding the torch for volontouring are still few and far between. Another gap to note is the minimal interest in travelling alone. Solo travel is a tendency commonly attributed to this generation, yet few admit to preferring solo travel. I speculate the reason for this is in the wording of the question, which used the words, *preferred* travel companion(s). I suspect that many solo travellers do so based largely on necessity (a desire to travel but lacking a spouse or anyone else who wants to accompany them on their desired trip). As already stated, Millennials know where they want to go, and once decided, they are not willing to make concessions – hence the existence of solo travellers. However, these represent far fewer tourists than society perceives.

C. Suggested Best Practices

One way for European TOs to attract Millennials is sell shortened versions of their tours, with a tailor-made aspect, allowing guests to incorporate a short adventure tour into their longer trip. Using a TO still advocates the facility of the trip, while at the same time, letting clients feel as if they are still getting the unique, authentic, and unusual experience that *they* desire.

It is also important to listen to your customers, as David Chapman of WYSE reminds us – TOs should have a ‘Comments’ section to allow guests to rate what worked and what didn't on their trip. Asking or reminding customers to leave reviews convinces more people to leave reviews, allowing communication that bridges the gap between customer and business owner. Negative reviews should be carefully monitored, as they can show a business the gap in his service, propose a solution to this gap and even respond by ‘flipping’ the negative comment online for all other users to see, giving the image of company who cares.

Mobile bookings account for a relatively small percentage, but Millennials do admit an attachment to their Smartphones. As mobile websites get more advanced, TOs need to make sure they keep up with the crowd, and have mobile-friendly devices for Millennials booking on the go. Playing into this is the Millennial’s selectivity – they do not simply chose the first company they find. Instead, they are ready to do research and find the company that they think fits their desired trip the best. TOs should make sure that websites are sleek and user-friendly, including enough information about trips, dates, locations, activities, gastronomy, equipment, and prices to convince the Millennial consumer to book. All of this is done via targeted online research – they are too smart and savvy to be pulled in by traditional marketing methods. Word-of-mouth has increased in importance – be sure to generate ambassadors to specific tours, companies and destinations by adding that additional personal touch that turns the trip from a 'pretty good' experience to a 'wow, that gave me Goosebumps!' experience.

Local gastronomy is widely important (even TOs already seem to understand this), but they should bear in mind that they must continue to innovate. Offer as options such experiences as cooking lessons, purchasing food from local markets, eating in family-owned restaurants, meeting the chef, picnicking in a dramatic place, wine-tasting, lunching in a local farmhouse, or even forging for the meal themselves (by mushroom-picking, fruit-picking, or fishing, etc.). This can be a great way to make a lasting impression, incite fidelity in your customers, and create great ambassadors for your business.

Millennials want adventure…but not too much of it. They want to feel as if they are on the brink of danger, without getting too close to the edge. They also want shorter trips to give them some flexibility and a part in the planning. TOs could offer shortened versions of their itineraries, going off soft-adventure activities that are highly-rated by Millennials as 'likely to try,' such as: Canoeing/kayaking, hiking, cycling, scuba diving, skiing, paragliding, etc. Add to the perceived adventure by avoiding chain businesses and sleeping in an unusual place – under the stars in a tent, a cosy B&B, a local gite or farmhouse, a family-run hotel, a sleek design hostel, an atypical hotel, an eco-lodges, or an Airbnb-type establishment.

Lastly, give guests time and suggestions on how to enjoy social interactions or entertainment activities – but don't force it in the itinerary, or else Millennials will feel as if the experience is not authentic. It is better for the Millennial tourist to 'discover' it by themselves, even if it was based off the tour guide's suggestions. Leave time for shopping (whether it be in shopping malls, shopping districts, or local markets), as well as time to go out to bars or clubs. Suggest local events, parties, or concerts going on in time (even if this requires additional research on the guide's part). Hire guides that are happy to chat and share with guests, as this makes another social connection for the Millennial tourist. Perhaps even chose dinner locations based on how 'local' they are, or whether they have local bands playing music!

D. For Future Study

Future work still required would be to study the Millennials more in detail, and to study them as they continue to mature. It would be interesting to further study the definition of 'travel' itself – what and how Millennials define the notion of travelling, and why shorter or local trips do not seem to count as 'travelling' to them. Why must 'travel' equate to far-flung, exotic and foreign destinations when most people only take these sorts of trips a few times a year, whereas local destinations account for so many more? This would be interesting to study further, as changing *this* perception with the Millennial travellers themselves may provide increased domestic opportunities to European tour operators.

Further study on *how* social media is used could be useful as well. This survey determined that Millennials prefer Facebook and Instagram to other platforms. Few say that any social media outlets are involved in the travel decision-making process. When asked *when* they post about their trips, the majority said they post largely upon their return. This leads one to conclude that Millennials thought about social media's role in their travel decisions limited only to the actual *trip*. I suspect that they do not consider the role that seeing photos, articles, videos or posts on Facebook or Instagram plays on their decisions – perhaps because this is happening sub-consciously. Further questioning on the role of social media may shed more light on whether social media actually plays more of a role than Millennials admit, or are even aware of.

Fear of missing out syndrome (FOMO) and bragging rights were two items mentioned by TOs in a negative light (largely ignored by Millennials and when acknowledged, presented in a positively as YOLO [You only live once]), which requires further study. With the rise of social media, an increase in the travel trend, and a smaller, more open world, has the vast amount of information sharing between people (often Millennials) all over the world created a sphere of never-ending competition? Are Millennials simply looking for the next thrill to show they can have a 'better' adventure than the next person? Does looking at a friend's or follower's post make them so jealous that they feel like they are missing out? Going off that, does seeing a destination on popular series or films have any effect on Millennial travel plans? These are interesting questions but would deserve more attention and more open-ended questions, perhaps even personal interviews.

D. Final Conclusion

Millennials are curious, open-minded and innovative people. They are our world's next generation – of executives, of entrepreneurs of travellers, of leaders, of people. They seek adventure and authenticity. They want experiences they will always remember, stories they will take away with them long after they arrive back home, stories to recount to family and friends for years to come. They want to feel special, they want to enjoy a thrill, learn something new, take a chance, have an adventure - but they still prefer to take only calculated risks. They are pragmatic, budget-conscious, intelligent and well-educated. They view the world as a giant destination at their fingertips, just waiting to be explored, and they feel they can do anything they can put their minds to. As they mature, economise their money and start families and businesses of their own, their role in tourism only continues to grow in importance, and the faster that European tour operators can learn how to adapt their services to fit their modern, changing attitudes, the faster they will start attracting and profiting from this significant next generation of tourism and travel and improve the adventure tourism offer in Europe.

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PART VII: ANNEXES

igure 1A

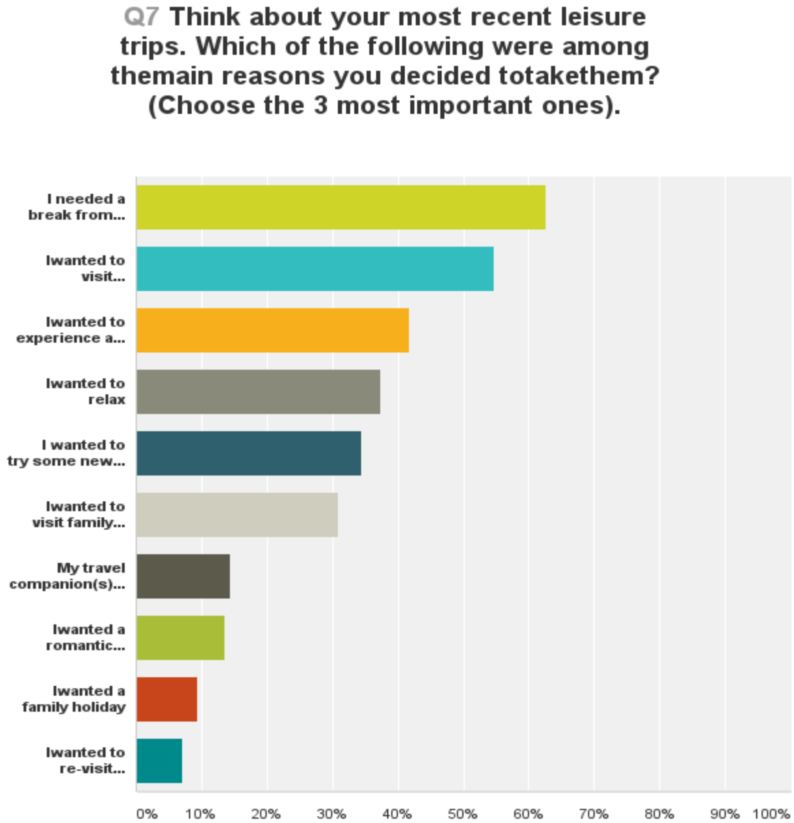


Figure 1B

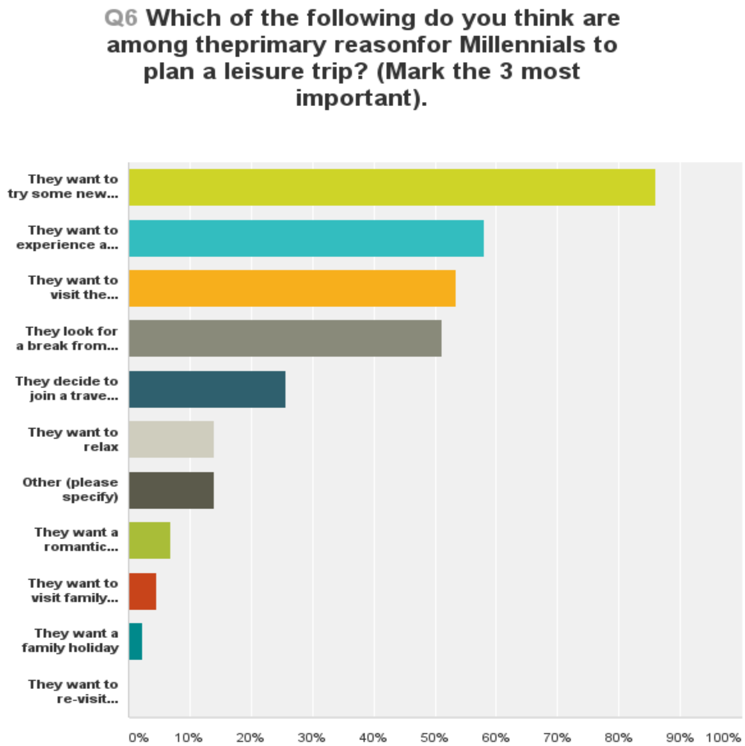


Figure 2A: Millennials

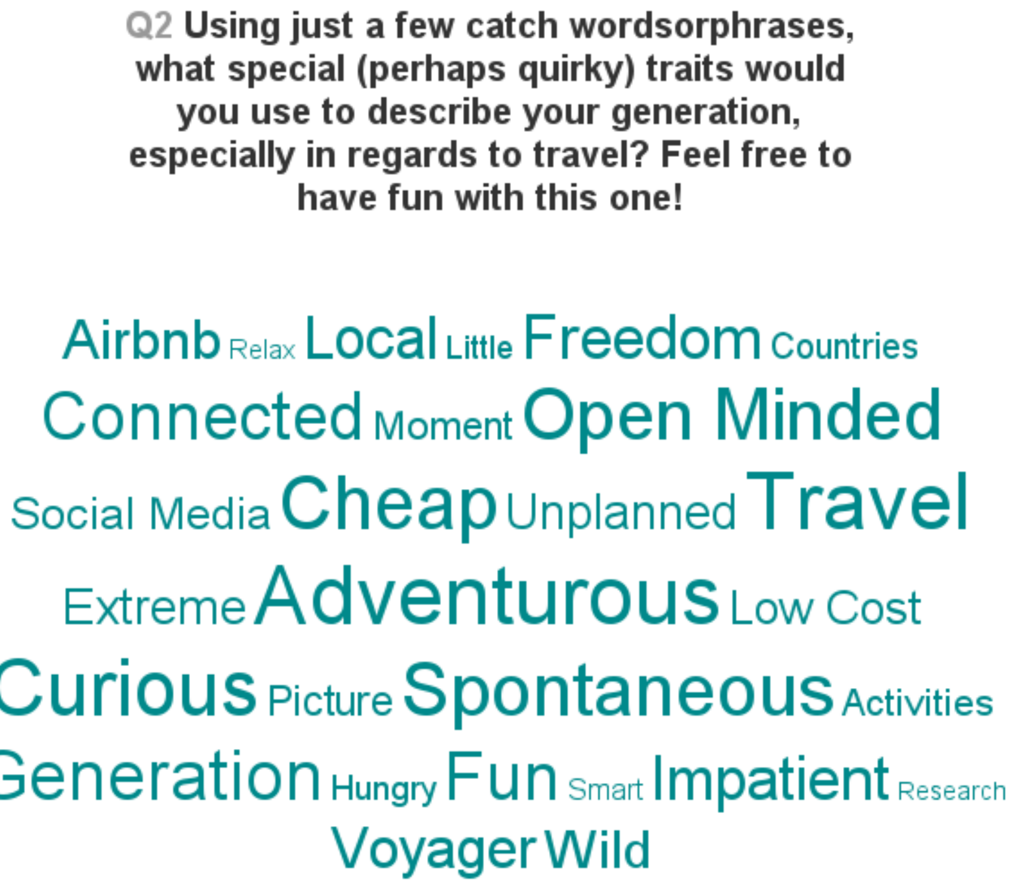


Figure 2B : TOs

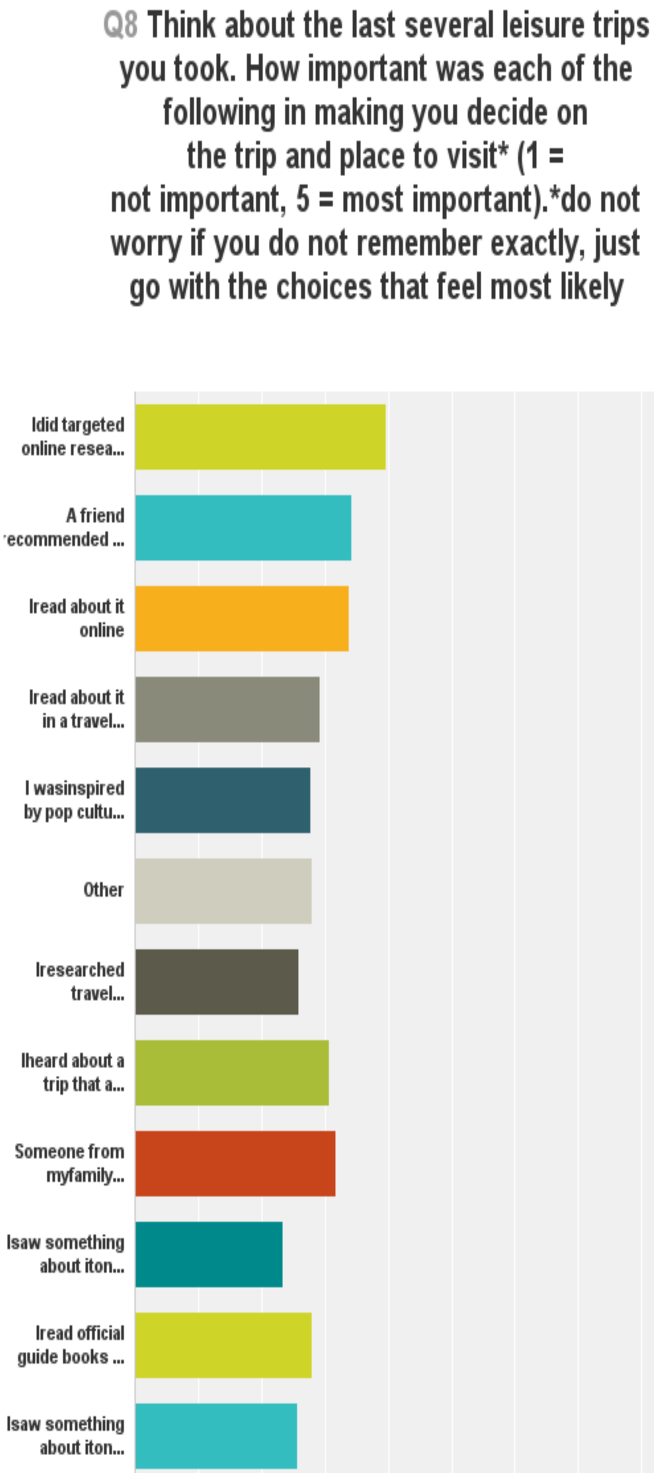


Figure 3A.
Millennials

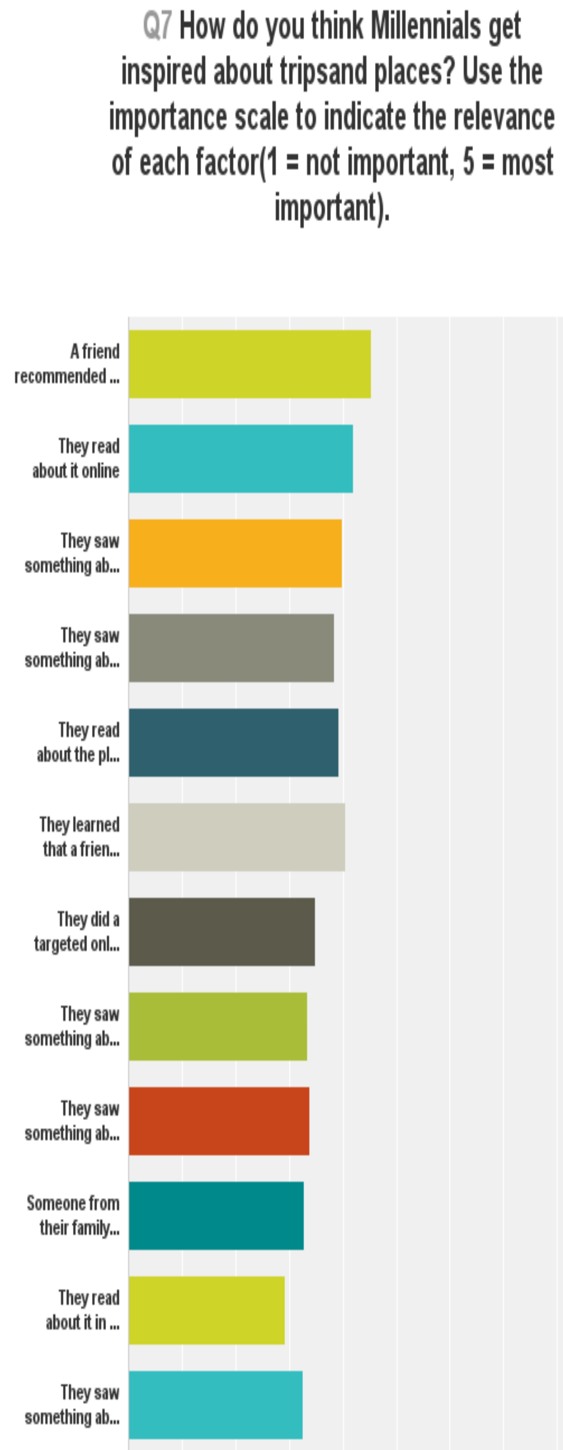


Figure 3B.
TOs

Figure 4A. Millennials

	1-not likely at all	2-only in rare cases	3-neutral	4-likely	5-most likely	Total	Weighted Average
Sampling local gastronomy (both food and drink)	0.00% 0	2.44% 1	9.76% 4	43.90% 18	43.90% 18	41	4.29
Going to a music, art or other festival	0.00% 0	0.00% 0	22.50% 9	42.50% 17	35.00% 14	40	4.13
Sightseeing in order to see the 'top sites' of a destination	2.44% 1	12.20% 5	26.83% 11	34.15% 14	24.39% 10	41	3.66
Visiting local markets	0.00% 0	0.00% 0	29.27% 12	51.22% 21	19.51% 8	41	3.90
Learning to make local food (learning how local food is prepared)	0.00% 0	26.83% 11	31.71% 13	26.83% 11	14.63% 6	41	3.29
Seeing traditional local music and/ or dancing	2.44% 1	7.32% 3	41.46% 17	34.15% 14	14.63% 6	41	3.51
Visiting crafts workshops	7.32% 3	14.63% 6	46.34% 19	21.95% 9	9.76% 4	41	3.12
Learning traditional local music and/ or dancing	9.76% 4	24.39% 10	29.27% 12	26.83% 11	9.76% 4	41	3.02

Figure 4B TOs

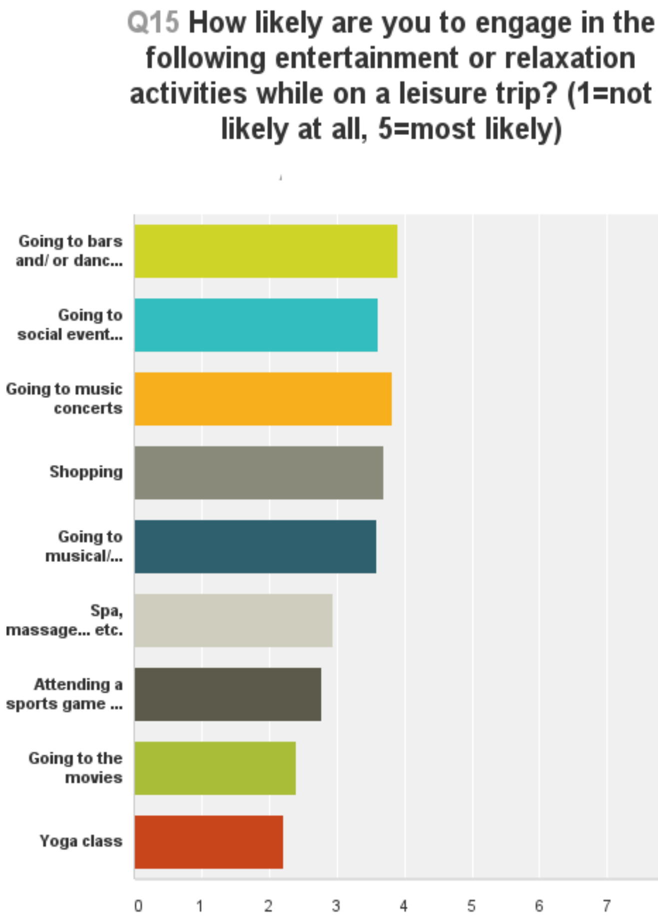
	1-not likely at all	2-only in rare cases	3-neutral	4-likely	5-most likely	Total	Weighted Average
Sampling local gastronomy (both food and drink)	2.33% 3	1.55% 2	3.10% 4	26.36% 34	66.67% 86	129	3.87
Sightseeing in order to see the 'top sites' of a destination	1.54% 2	3.08% 4	10.77% 14	40.00% 52	44.62% 58	130	3.78
Visiting local markets	0.77% 1	3.08% 4	12.31% 16	43.85% 57	40.00% 52	130	3.79
Going to a music, art or other festival	3.85% 5	13.85% 18	17.69% 23	34.62% 45	30.00% 39	130	3.43
Seeing traditional local music and/ or dancing	3.10% 4	5.43% 7	22.48% 29	39.53% 51	29.46% 38	129	3.57
Visiting museums	5.43% 7	10.08% 13	20.93% 27	37.21% 48	26.36% 34	129	3.43
Learning to make local food (learning how local food is prepared)	19.38% 25	19.38% 25	23.26% 30	20.93% 27	17.05% 22	129	2.80
Learning traditional local music and/ or dancing	17.83% 23	26.36% 34	24.03% 31	17.05% 22	14.73% 19	129	2.70

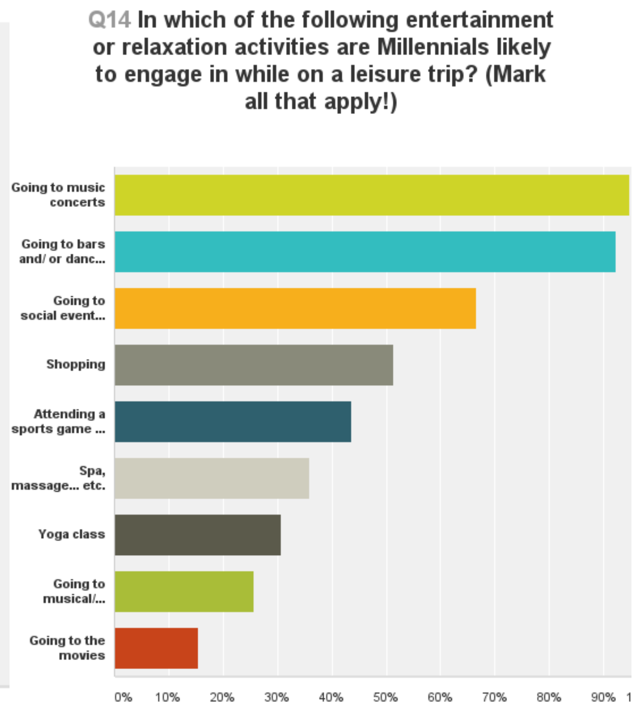
Top: Figure 5A. Millennials

	1-not likely at all	2-only in rarecases	3-neutral	4-likely	5-most likely
Hiking (short scale)	1.57% 2	10.24% 13	9.45% 12	36.22% 46	42.52% 54
Canoeing and/or kayaking	11.81% 15	18.11% 23	18.90% 24	30.71% 39	20.47% 26
Scuba Diving	19.84% 25	16.67% 21	15.87% 20	27.78% 35	19.84% 25
Skiing	25.98% 33	17.32% 22	16.54% 21	21.26% 27	18.90% 24
Surfing, Kite surfing, Wind-surfing	28.00% 35	16.80% 21	14.40% 18	23.20% 29	17.60% 22
Ziplining	22.40% 28	13.60% 17	23.20% 29	24.00% 30	16.80% 21
Cycling (short scale)	15.63% 20	18.75% 24	22.66% 29	28.13% 36	14.84% 19
Trekking (long distance)	25.20% 32	22.05% 28	14.96% 19	25.20% 32	12.60% 16
Skydiving	42.06% 53	13.49% 17	14.29% 18	18.25% 23	11.90% 15
Waterskiing	27.78% 35	19.84% 25	22.22% 28	18.25% 23	11.90% 15
Snowboarding	48.03% 61	14.17% 18	14.96% 19	11.81% 15	11.02% 14
Via Ferrata	31.20% 39	12.00% 15	30.40% 38	16.00% 20	10.40% 13
Canyoning	28.00% 35	16.00% 20	26.40% 33	20.00% 25	9.60% 12
Paragliding	34.13% 43	14.29% 18	23.02% 29	19.05% 24	9.52% 12

Bottom: Figure 5A. TOs

	1-not likely at all	2-only in rare cases	3-neutral	4-likely	5-most likely
Hiking (short scale)_	0.00% 0	2.50% 1	7.50% 3	42.50% 17	47.50% 19
Cycling (short scale)	0.00% 0	2.56% 1	23.08% 9	46.15% 18	28.21% 11
Canoeing orkayaking	0.00% 0	2.56% 1	25.64% 10	48.72% 19	23.08% 9
Snowboarding	0.00% 0	7.69% 3	23.08% 9	48.72% 19	20.51% 8
Scuba Diving	2.63% 1	10.53% 4	21.05% 8	44.74% 17	21.05% 8
Paragliding	2.56% 1	33.33% 13	33.33% 13	15.38% 6	15.38% 6
Surfing, Kite surfing, Wind-surfing	2.63% 1	18.42% 7	23.68% 9	39.47% 15	15.79% 6
Skiing	2.56% 1	7.69% 3	23.08% 9	53.85% 21	12.82% 5
Bungee jumping	2.50% 1	32.50% 13	22.50% 9	30.00% 12	12.50% 5
Skydiving	7.89% 3	34.21% 13	26.32% 10	18.42% 7	13.16% 5
Waterskiing	5.13% 2	20.51% 8	30.77% 12	30.77% 12	12.82% 5
Canyoning	0.00% 0	17.95% 7	30.77% 12	41.03% 16	10.26% 4
Rock climbing	5.00% 2	30.00% 12	27.50% 11	27.50% 11	10.00% 4
Ziplining	2.50% 1	15.00% 6	32.50% 13	40.00% 16	10.00% 4



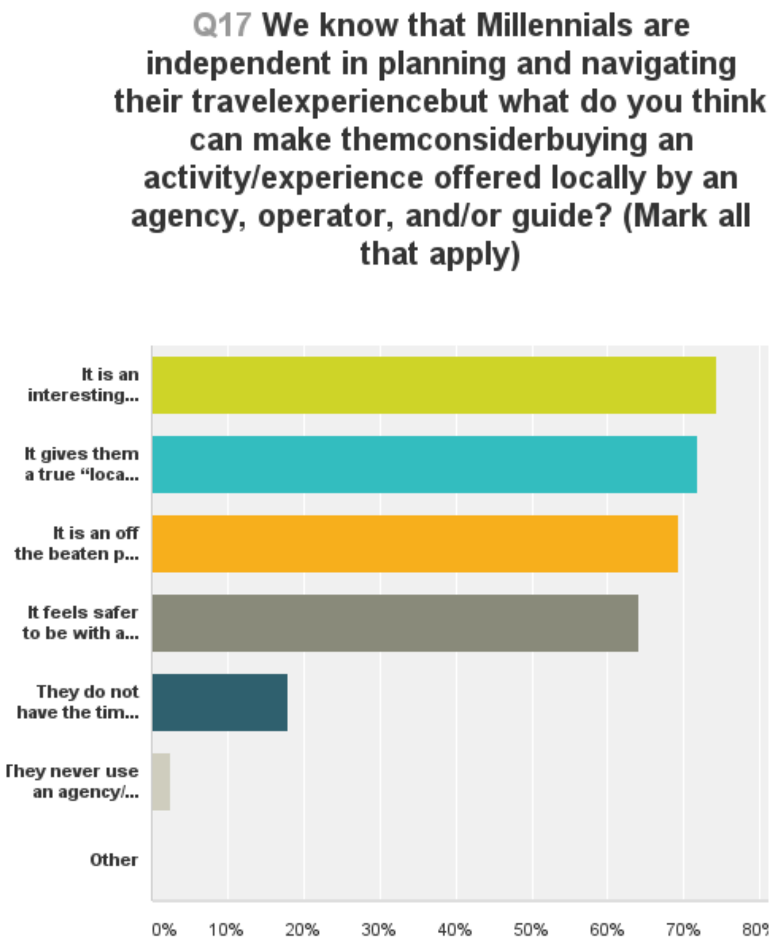


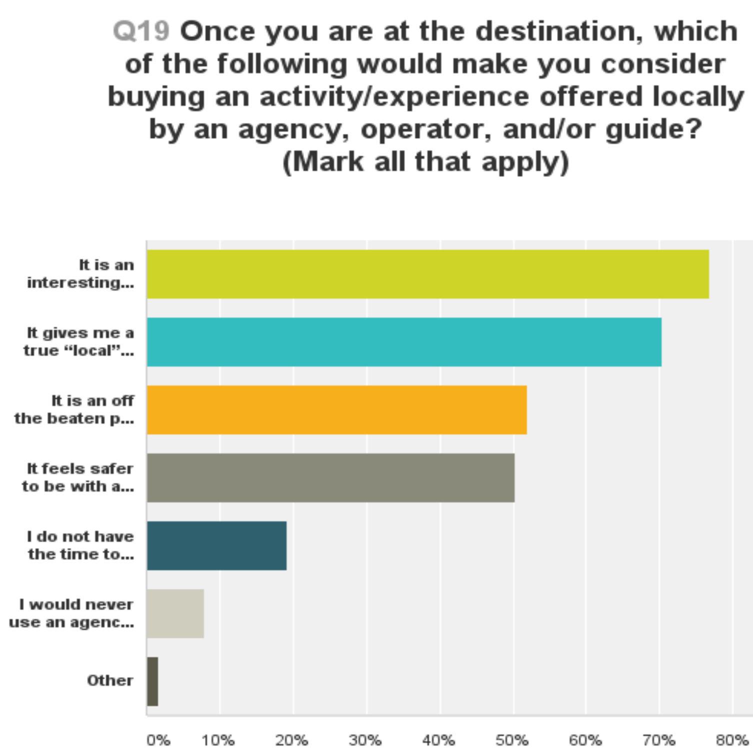
	Yes	No	No, but I would consider purchasing
Guided day trips (guided tours, guidedsite visits, etc.)	45.24% 57	35.71% 45	19.05% 24
Guided active experiences (hiking, biking, canoeing experience)	25.81% 32	41.13% 51	33.06% 41
Guided cultural experiences (market tours, culinary tours, craft visits, cooking class, etc.)	18.25% 23	48.41% 61	33.33% 42
A package holiday (such as an all inclusive vacation)	17.60% 22	67.20% 84	15.20% 19
Private tours	14.29% 18	69.84% 88	15.87% 20

	1-not likely at all	2-inrare cases	3-neutral	4-likely	5-most likely
Guided active experiences (hiking, biking, canoeing experience)	0.00% 0	0.00% 0	28.21% 11	43.59% 17	28.21% 11
Guided day trips	5.13% 2	17.95% 7	25.64% 10	35.90% 14	15.38% 6
Guided cultural experiences (market tours, culinary tours, craft visits, etc.)	2.56% 1	17.95% 7	41.03% 16	28.21% 11	10.26% 4
Private tours	15.79% 6	50.00% 19	10.53% 4	21.05% 8	2.63% 1
A package holiday	17.95% 7	35.90% 14	30.77% 12	15.38% 6	0.00% 0
None of the above	30.77% 4	0.00% 0	61.54% 8	7.69% 1	0.00% 0

Top : Figure 6A.
Bottom : Figure 7A.
Millennials

Top : Figure 6B.
Bottom : Figure 7B.
TOs





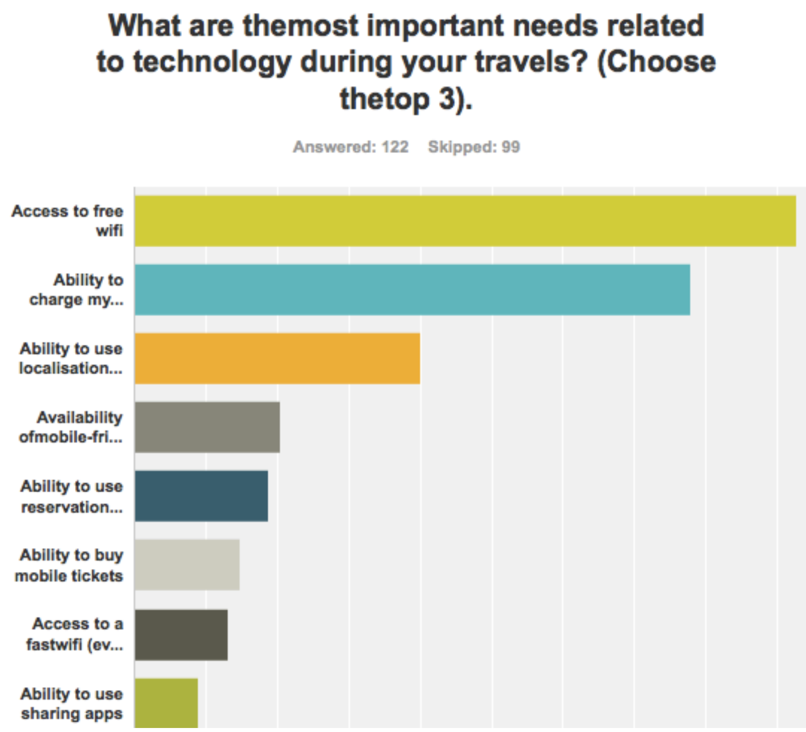
Top : Figure 8A TOs
Bottom : Figure 8B Millennials

Top : Figure 9A. TOs
Bottom : Figure 9B. Millennials

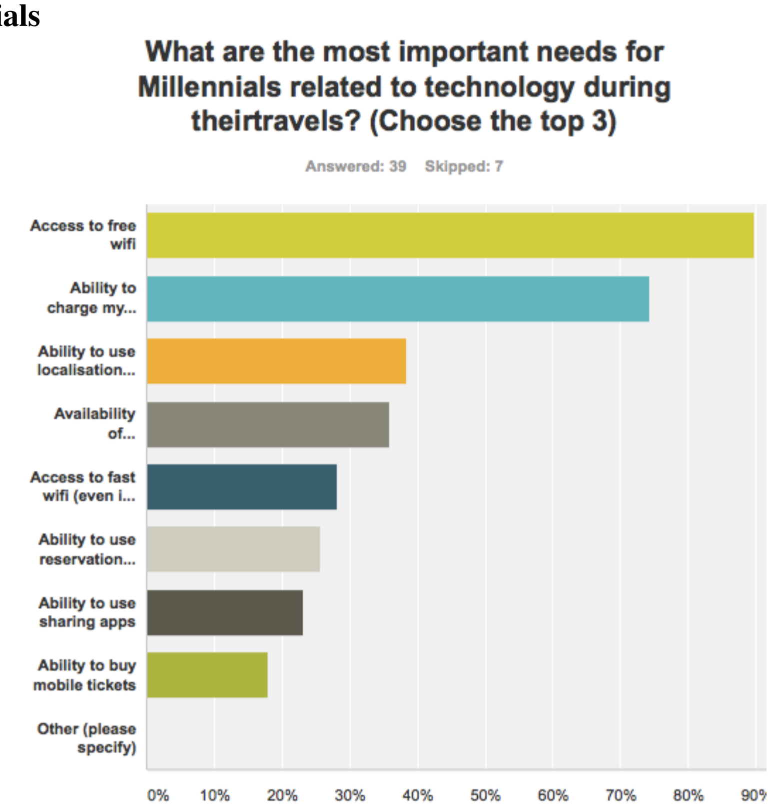
	1-not important at all	2-only in rare cases	3-neutral	4-important	5-most important
Instagram	0.00% 0	2.63% 1	7.89% 3	39.47% 15	50.00% 19
Facebook	0.00% 0	0.00% 0	10.53% 4	42.11% 16	47.37% 18
Snapchat	2.63% 1	7.89% 3	28.95% 11	39.47% 15	21.05% 8
Pinterest	5.41% 2	18.92% 7	51.35% 19	18.92% 7	5.41% 2
Twitter	5.26% 2	13.16% 5	39.47% 15	36.84% 14	5.26% 2
Blog	5.71% 2	14.29% 5	48.57% 17	25.71% 9	5.71% 2

Top: Figure 10A TOs
Bottom: Figure 10B: Millennials

	1-Not important at all	2-Occasionally relevant	3-Neutral	4-Important	5-Most important
Facebook	8.13% 10	6.50% 8	14.63% 18	32.52% 40	38.21% 47
Instagram	29.41% 35	7.56% 9	8.40% 10	22.69% 27	31.93% 38
Blog	61.34% 73	10.08% 12	10.92% 13	12.61% 15	5.04% 6
Snapchat	67.52% 79	7.69% 9	6.84% 8	13.68% 16	4.27% 5
Twitter	77.12% 91	7.63% 9	8.47% 10	5.08% 6	1.69% 2
Pinterest	70.34% 83	9.32% 11	11.86% 14	7.63% 9	0.85% 1



Top: Figure 11A: Millennials



Bottom: Figure 11B: TOs

	I have tried	I haven't tried but I would be willing to try	I haven't tried anddo not intendtotry
Hitchhiking	23.73% 28	16.95% 20	59.32% 70
Cycling holiday (i.e. travel 2+ days by cycling)	6.78% 8	45.76% 54	47.46% 56
Couchsurfing	20.51% 24	32.48% 38	47.01% 55
Walking holiday (i.e. travel 2+ days by foot)	19.17% 23	45.83% 55	35.00% 42
Working Holiday (i.e. working while on holiday to earn money or simply to try a new activity like fruit picking or re-building a castle)	11.67% 14	55.83% 67	32.50% 39
Volontouring (volunteer tourism)	11.02% 13	61.86% 73	27.12% 32
Staying with a host family	32.77% 39	46.22% 55	21.01% 25
Ride-sharing (like BlaBlaCar or Uber)	60.50% 72	24.37% 29	15.13% 18
Home-sharing (like HomeAway or Airbnb)	56.30% 67	33.61% 40	10.08% 12

Home-sharing (like HomeAway or Airbnb)	86.49%
Budget Airlines (like RyanAir, EasyJet, WizzAir, etc)	81.08%
Ride-sharing (like BlaBlaCar or Uber)	59.46%
Volontouring (volunteer tourism)	56.76%
Couchsurfing	51.35%
Working Holiday (i.e. working while on holiday to earn money or simply to try a new activity like fruit picking or re-building a castle)	48.65%
Cycling holiday (i.e. travel 2+ days by cycling)	43.24%
Walking holiday (i.e. travel 2+ days by foot)	40.54%
Staying with a host family	35.14%
Hitchhiking	29.73%

Top: Figure 12A: Millennials
Bottom: Figure 12B: TOs