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Motivations of global Millennial travelers

Motivações dos viajantes millennials globais

Motivaciones de los viajeros globales de la generación del milenio

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Keywords:

Millennial travellers;
Travel motivations;
Travel behaviour;
Generation Y;
Generation.

Abstract

This paper reports on a global survey of Millennial travellers aged 18-35 and analyses motivations across world regions and countries. An adapted version of the Leisure Motivations Scale was subjected to factor analysis, revealing four dimensions of motivation: Relaxation, Exploring, Challenge and Socialising. All Millennials tend to see exploring as most important, but Asian travellers in particular emphasise both relaxation and challenge. Motivations were also found to vary according to age and destination, indicating that motivations are not just individual, but also context-related. We conclude that Millennials are not a coherent global generation in terms of travel motivations.

Palavras-chave:

Millennials;
Motivação de viagem;
Comportamento de viagem;
Geração Y;
Geração.

Resumo

Este artigo relata uma pesquisa global com viajantes millennials entre 18 e 35 anos e analisa as motivações em todas as regiões e países do mundo. Uma versão adaptada da Leisure Motivations Scale foi submetida a análise fatorial, revelando quatro dimensões de motivação: Relaxamento, Exploração, Desafio e Socialização. Todos os Millennials tendem a ver a exploração como o mais importante, mas os viajantes asiáticos, em particular, enfatizam o relaxamento e o desafio. Verificou-se também que as motivações variam de acordo com a idade e o destino, indicando que as motivações não são apenas individuais, mas também relacionadas ao contexto. Concluímos que a geração do milênio não é uma geração global coesa em termos de motivações de viagem.

Palabras clave:

Generación del milenio;
Motivación de viaje;
Comportamiento de viaje;
Generación Y;
Generación.

Resumen

Este artículo informa sobre una encuesta global de viajeros de la generación del milenio de entre 18 y 35 años y analiza las motivaciones en todas las regiones y países del mundo. Una versión adaptada de la Escala de Motivaciones de Ocio fue sometida a un análisis factorial, que reveló cuatro dimensiones de la motivación: Relajación, Exploración, Desafío y Socialización. Todos los millennials tienden a ver la exploración como la más importante, pero los viajeros asiáticos en particular enfatizan tanto la relajación como el desafío. También se encontró que las motivaciones varían según la edad y el destino, lo que indica que las motivaciones no son solo individuales, sino también relacionadas con el contexto. Concluimos que la generación del milenio no es una generación global cohesionada en términos de motivaciones de viaje.



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1 INTRODUCTION

Youth travel is an important segment of the global tourism market, accounting for an estimated 23% of all international travel arrivals (UNWTO, 2016). The main drivers of this segment are Millennials, or young people born between around 1980 and 1996. There has been a lot of research on the consumption patterns of Millennials, but usually they are treated as a relatively homogenous group, with shared values and behaviour. One might expect, however, that Millennials from different parts of the world will differ in terms of their motivations and travel behaviour.

Millennials have been characterised as a diverse and inclusive generation, who are technologically savvy, in search of work-life balance, keen on social responsibility and helping others (Bannon, Ford and Meltzer, 2011). Their drive to experience the world means that Millennials are avid travellers (UNWTO, 2016). This makes this group highly desirable for destinations keen to increase their tourism income, diversify their markets and add cultural vibrancy. Millennials are particularly important in terms of Latin American travel markets, because of the relatively high proportion of the population in youth cohorts. However, there has been relatively little comparative research conducted to investigate the travel motivations and behaviour of Millennials in different world regions. This paper presents evidence from a major international survey of Millennial travellers to analyse their profile and travel motivations. The basic research question is: can Millennial travellers be regarded as a homogenous group, or do significant differences exist between world regions in terms of travel motivations and behaviour?

2 LITERATURE REVIEW

Generalising about generations is fraught with problems. A generation is “an identifiable group of cohorts that share year, age location and significant life events” Kopperschmidt (2000:66), or a group of individuals who have shared similar experiences and have unique common characteristics around these experiences (Beldona, Nusair, & Demicco, 2009).

But the extent to which these shared characteristics and experiences also produce shared attitudes and behaviour is debateable. Greenberg & Weber (2008), writing about Millennials as “Generation We” remark that being members of the same generation doesn’t mean people think or feel the same.

This doesn’t seem to stop people generalising. Moscardo and Benckendorff (2010) identify some level of agreement about the applicability of four particular Millennial themes: an open approach to adopting and using digital media; positive views on factors such as diversity, flexibility, social issues and its own future; a strong orientation towards family and social groups; and a considerable extension of adolescence. Greenberg and Weber (2008) see the defining characteristics of Millennials (or Generation Y) as being wired, optimistic, responsible, innovation-minded, politically engaged, more progressive than the previous Generation X, tolerant and pro-environment.

An important feature of the Millennial generation is that they have been delaying entry into the workforce and using travel as a means of developing themselves and their future careers. In the UK, the proportion of young adults living with their parents has risen from 21% in 1996 to 26% in 2017. The relative absence of responsibility for many Millennials allows them to travel more flexibly, save to travel and tap into their parent’s resources as well. Parents not only pay for their children to study at university (often involving a stay abroad – HSBC, 2017), but they also contribute heavily to their travel expenses as well. Sheehan, Sweeny, Rasmussen, Wils, Friedman, Mahon, J., & Stenberg, K. (2017) argue that the definition of adolescence should now be expanded from the previous range of 10-19 years to 10-24 years. The delay of adulthood is compounded by relatively flexible working patterns for millennials. In 2017, only 31% of Millennials said they expected to stay in their current job in five years (Deloitte, 2017). This provides more potential for people to take time out, have a sabbatical or re-train for a new function. In addition, Millennials in the United States appear to have more money to spend on travel now. US Millennials spent \$4,594 on vacations in 2017, an 8% increase from 2016 (Fromm, 2017).

The position of Millennials as tech-savvy ‘digital natives’, who grew up with a much wider range of personal technology than previous generations, is one temporal factor that extends across the developed economies.

This also means that research on Millennial travel has often focussed on their use of technology to gather information and make decisions. For example, Gotardi, Senn, Cholakova, Liebrich & Wozniak (2015) analysed the use of mobile devices (i.e. smartphones and tablets) during their stay in a Swiss city destination. They found that taking pictures and sharing them on different social media platforms were the main reasons for using their mobile devices. Mobile device usage was also related to navigation and planning of the continuing trip. Free and fast connectivity was therefore found to be important for Millennials. Ek Styvén & Foster (2018) analysed factors influencing the propensity to share travel experiences in social media during a trip, across a sample of Millennial and generation Z (under 18) consumers in Sweden, UK and India. They found few significant differences between the two generations or between countries. However, Cavagnaro, Staffieri & Postma (2018) identified nine different clusters of Dutch Millennial travellers on the basis of values and travel meaning, and concluded that “not all young travellers have a clear view on the guiding principles in their life”.

There has been particular research attention for Chinese Millennials, because of the size and spending power of this group. de Vrieze-McBean (2016) reports that Generation Y (defined as those born from 1981 to 1990), represents around 31% of China's total population. She notes that although Chinese Millennials are keen to leave their mark on society by pursuing their passions, they are restricted in doing so by cultural and societal constraints. This means they want freedom, seeking meaningful, yet adventurous and exciting experiences. Chinese Millennials are digitally savvy, almost all having a smartphone they use to share experiences on social media platforms. Research by Xie (2017) on young Chinese backpackers also argues that backpacking represents ‘freedom’ and ‘independence’ within the context of China. Backpacking is often used as a process of reflexive awareness by young Chinese people.

For the wider Asian Millennial market Du Cros (2014) examined travel behaviour in Hong Kong, and also found that they were looking for spontaneity and adventure. She identified six potential types of Asian independent Millennial traveller: Quest –packer, Same-packer, Traditional backpacker, Flexo-packer, Flash-packer and Long-packer. Asian and other Millennial markets were also reviewed in the contributions to the volume *Tourism and Generation Y* (Benckendorff, Moscardo, & Pendergast, 2010). This identified a number of niche markets associated with Millennial travel, such as adventure tourism and wine tourism, and individual Asian destinations, such as South Korea.

The majority of research on Millennial travel behaviour, however, is conducted in a single country or region. There is a widespread assumption that Millennials represent a generation that “sees itself as a single, closely linked generation with much more in common than dividing them” (Greenberg & Weber, 2008:24). On this basis Greenberg and Weber also extrapolate research findings on American youth globally, because “American youth are the Millennials about whom most is known” (p. 23). The question to be posed in looking at generations on a global basis is the extent that people belonging to the same generational cohort in different countries, world regions and cultures share similar attitudes and behaviours as a result of their temporal synchronicity.

In an effort to understand better the similarities and differences between Millennial travellers in different parts of the world, this paper reports on a global youth travel survey that examines the motivations and travel behaviour of young travellers under the age of 35. The research addresses the extent to which Millennials can be seen as a homogenous worldwide generation based on their travel motivations.

3 METHODOLOGY AND ANALYSIS

In order to compare Millennial travel motivations on a global basis it is necessary to conduct large-scale surveys of Millennial travellers. This paper is based on surveys conducted by the World Youth Student Educational (WYSE) Travel Confederation in 2014. WYSE is the umbrella body for youth and student travel organisations, and has a network of member companies and associations that service the needs of the Millennial traveller. WYSE has been conducting a structured research programme on youth travel since 2002 (Richards and Wilson, 2003).

The first wave of survey research for the New Horizons Research Programme was undertaken in 2002 and repeated in 2007 and 2012 (Richards and Wilson 2003, 2004; WYSE Travel Confederation 2013). The survey questions were developed initially through expert consultations with academics and practitioners within the Association for Tourism and Leisure Research and Education (ATLAS) network, and subsequently refined through different editions of the survey (Richards and Wilson, 2003). The basic survey instrument covers a number of key areas of youth travel behaviour, including previous travel experience, travel style, details of the last main trip undertaken in the previous 12 months (destinations, travel modes, accommodation, information gathering), travel purpose and motivations, attitudinal data and perceived benefits of travel.

In 2014 a specific Millennial Traveller Survey was undertaken to analyse the travel behaviour of Millennials in different world regions. WYSE members in different countries distributed web-based survey links to young travellers who had purchased products and services with them. The link was distributed via email to individuals on the mailing lists of WYSE members, as well as their Facebook pages. A specific Chinese language version of the survey was also distributed via social media (Weibo and WeChat) and travel companies in China to increase coverage of this key area. The web surveys generated a total convenience sample of 4647 individuals, of whom 3414 were aged 18-34 at the time of the survey (born between 1980 and 1996) and who had bought or obtained information on youth travel products in the previous 12 months. The respondents were fairly evenly distributed by world region, although some specific countries had particularly high number of respondents, notably Australia, China, Mexico, the United States and the United Kingdom. This related mainly to the availability of the different language versions of the survey. As this is a convenience sample the results cannot be generalised to the global Millennial population as a whole, but the relatively large sample size means that a good picture can be obtained of the travel behaviour of the participating groups and individuals.

The age distribution of the sample generally reflects the profile of youth travellers, with 66% being aged 18-25 (Table 1). This matches the 66% of the respondents to the 2012 New Horizons survey in the same age group. The majority of the survey respondents were female (73%), which also reflects the high proportion recorded in the global WYSE New Horizon Surveys in 2012 (67%). This consistent pattern indicates that females are much more likely to respond than males, which is one of the problems often encountered with online convenience surveys.

In order to gather information on the motivations related to one single trip, respondents were asked to report on what they considered to be their main trip within the 12 months prior to the survey. In order to analyse motivations, an adapted version of the Beard and Ragheb (1983) leisure motivation scale was used. This scale, which was extensively tested by Ryan and Glendon (1998) among others, was applied during previous waves of the WYSE research (Richards and Wilson, 2003). Ryan and Glendon found that a 13 item motivation scale showed good consistency over time, and that it could be applied in a tourism context. They also found four emerging factors from the scale, relating to the social dimension, the relaxation dimension, the intellectual dimension and the competence-mastery dimension.

In developing the adapted motivation scale for the current study, the item 'Gain a feeling of belonging' was changed into 'interact with local people' and the item 'meet other travellers' was added to the social dimension. This allowed us to distinguish between friendships built with people living in the destination and those forged with fellow travellers. This provides a measure of the extent to which the traveller wants to escape the 'tourist bubble' or enclave (Wilson & Richards, 2008) and make contact with locals. In addition, 'use my imagination' was changed to 'develop my creativity' to account for creative modes of travel (Richards, 2011). Other adapted items were developed in the intellectual dimension on 'learn more about myself', which equates to the oft-quoted idea that young people travel 'to find themselves' (Carnavan, 2018) and 'experience everyday life in another country', which relates to the 'live life like a local' trends (Russo and Richards, 2016). The two competence-mastery items 'use my physical abilities' and 'challenge my abilities' were combined because of potential overlap, and 'help people in the destination' was added to this dimension to indicate the 'soft skill' of empathy.

Table 1 – Sample profile

Age group	n	%
18-22	1208	35,4
23-25	1045	30,6
26-29	780	22,9
30-34	380	11,1
Gender		
Male	909	26,6
Female	2500	73,2
Main origin countries		
Australia	641	18,8
China	563	16,5
Mexico	546	16,0
UK	307	9,0
USA	188	5,5
New Zealand	130	3,8
Denmark	129	3,8
Germany	100	2,9
World regions		
Europe	987	28,0
North America	298	8.4
Asia	700	19.7
Oceania	800	22,5
Latin America	655	18.5
Other	108	3.0
Education level		
Primary	14	0,4
Secondary	263	7,7
Certificate/Diploma	499	14,6
Bachelor Degree	1900	55,7
Postgraduate De- gree	630	18,5
Other	104	3,0

The data collected were analysed using SPSS version 24 software. The 16 item motivation scale yielded a Cronbach's Alpha of 0.853. This was improved to 0.858 by deleting the item 'have a good time with friends from home'. The data were then subject to principal components factor analysis (PCA) to identify latent dimensions. The PCA was conducted with an oblique rotation because it was believed that the dimensions were somewhat distinct, but not completely independent of one another (Bearden, et al., 1989).

Table 2 - Beard and Ragheb leisure motivation scale applied to tourism (after Ryan and Glendon, 1998) and operationalisation in the current study

Dimensions	Social dimension	Relaxation dimension	Intellectual dimension	Competence-mastery dimension
Items	Be with Others Have a Good Time with Friends Build Friendships Develop Close Friendships Gain a Feeling of Belonging	Relax Mentally Be in a Calm Atmosphere Relax Physically Avoid the Hustle and Bustle	To Increase my Knowledge Discover New Places and Things Use my Imagination	Use my Physical Abilities Challenge my Abilities
Operationalisation in the current study				
Items	Meet other travellers Have a good time with friends from home Visit friends and relatives living abroad Build friendships with people from other countries Interact with local people	Relax mentally Be in a calm atmosphere Relax physically Avoid the hustle and bustle	To increase my knowledge Learn more about myself Develop my creativity Explore other cultures Experience everyday life in another country	Test and develop my physical abilities Help people in the destination

4 RESULTS

The Kaiser-Meyer-Olkin measure of sampling adequacy for the PCA was 0.864, which is an acceptable value for a satisfactory factor analysis to proceed. Bartlett's Test of Sphericity is significant (0.000, $df = 105$) indicating that correlations between items were sufficiently large to meaningfully conduct a PCA. An initial analysis was run to obtain eigenvalues for each component in the data. Four components had eigenvalues over Kaiser's criterion of 1, which together explained 66% of the variance. Visual inspection of the scree plot also confirmed the presence of four factors. Table 3 shows the factor loadings after rotation.

The items that cluster on component 1 (Relax mentally, Relax physically, Be in a calm atmosphere, Avoid the hustle and bustle) suggest relaxation. Component 2 items (Explore other cultures, Experience everyday life in another country, Interact with local people, Increase my knowledge) are related to exploring other cultures, and Component 3 items (Test and develop my physical abilities, Learn more about myself, Develop my creativity, Help people in the destination) are broadly related to the desire to challenge and develop oneself. The final component seems related to socialising both with known people and new contacts (Visit friends and relatives living abroad, Build friendships with people from other countries, Meet other travellers). The four components were therefore labelled Relaxation, Exploring, Challenge and Socialising. These four dimensions also generally mirror those found by Ryan and Glendon (1998). New scales were computed for the four motivational dimensions in order to explore similarities and differences between respondents.

Table 3 - Rotated Component Matrix for Principal Components Analysis

	Relaxation	Component		
		Exploring	Challenge	Socialising
Relax mentally	.830			
Relax physically	.816			
Be in a calm atmosphere	.799			
Avoid the hustle and bustle	.677			
Explore other cultures		.866		
Experience everyday life in another country		.780		
Interact with local people		.752		
Increase my knowledge		.627		
Test and develop my physical abilities			.790	
Learn more about myself			.718	
Develop my creativity			.636	
Help people in the destination			.506	
Visit friends and relatives living abroad				.744
Build friendships with people from other countries				.718
Meet other travellers				.655
% variance explained	18.6	18.4	16.5	12.5

Rotation Method: Varimax with Kaiser Normalization.

Rotation converged in 6 iterations.

Table 4 - Motivational dimensions by world region

World region	Relax	Exploring	Challenge	Socialise
Europe	7.23	8.71	6.93	6.87
North America	6.84	8.93	7.23	6.69
Asia	8.42	8.88	7.99	7.28
Oceania	7.12	8.80	7.24	6.98
Latin America	7.65	9.21	7.70	7.53
Total	7.48	8.88	7.37	7.08
F	59.76	15.46	35.31	15.07
Sig.	0.000	0.000	0.000	0.000

Firstly the motivational dimensions were analysed for Millennials across major world regions. Travellers coming from Latin America score highest in terms of desire to explore and socialising (Table 4). This seems to fit the largely long haul nature of the travel destinations of the Latin American respondents, and the importance of social contacts in a Latin American context. It is interesting that Asian travellers score highest on both relaxation and challenge, suggesting a desire to mix different types of experiences in a single trip. They also score high on socialisation, which is basically related to the desire to meet other travellers. These differences between world regions are significant controlling for age, gender and education level. When we look in more detail at global sub-regions (according to the UNWTO classification), more differences in motivation are also clear (Figure 1). For example, South East Asian Millennials are less likely to want to socialise than respondents from South Asia or North-East Asia. One of the major reasons for this is that South East Asia respondents scored much lower on 'Visit friends and relatives living abroad', which probably relates to less extensive kinship networks than might be available to travellers coming from the Indian sub-continent or China, for example. Travellers from Central America and the Caribbean, in contrast were the most likely to want to socialise, scoring particularly high on 'Build friendships with people from other countries'. This is probably related to the more outgoing and open nature of these cultures. For Millennials from the Americas and those from Central/Eastern Europe and Southern/Mediterranean Europe, exploring is particularly important. This may be related to an attitude of travel being an important extension of education. For travellers from Central

America, the Caribbean and North-East Asia challenge is a more important motivational factor than for other origins.

Figure 1 - Motivational dimensions by world sub-region

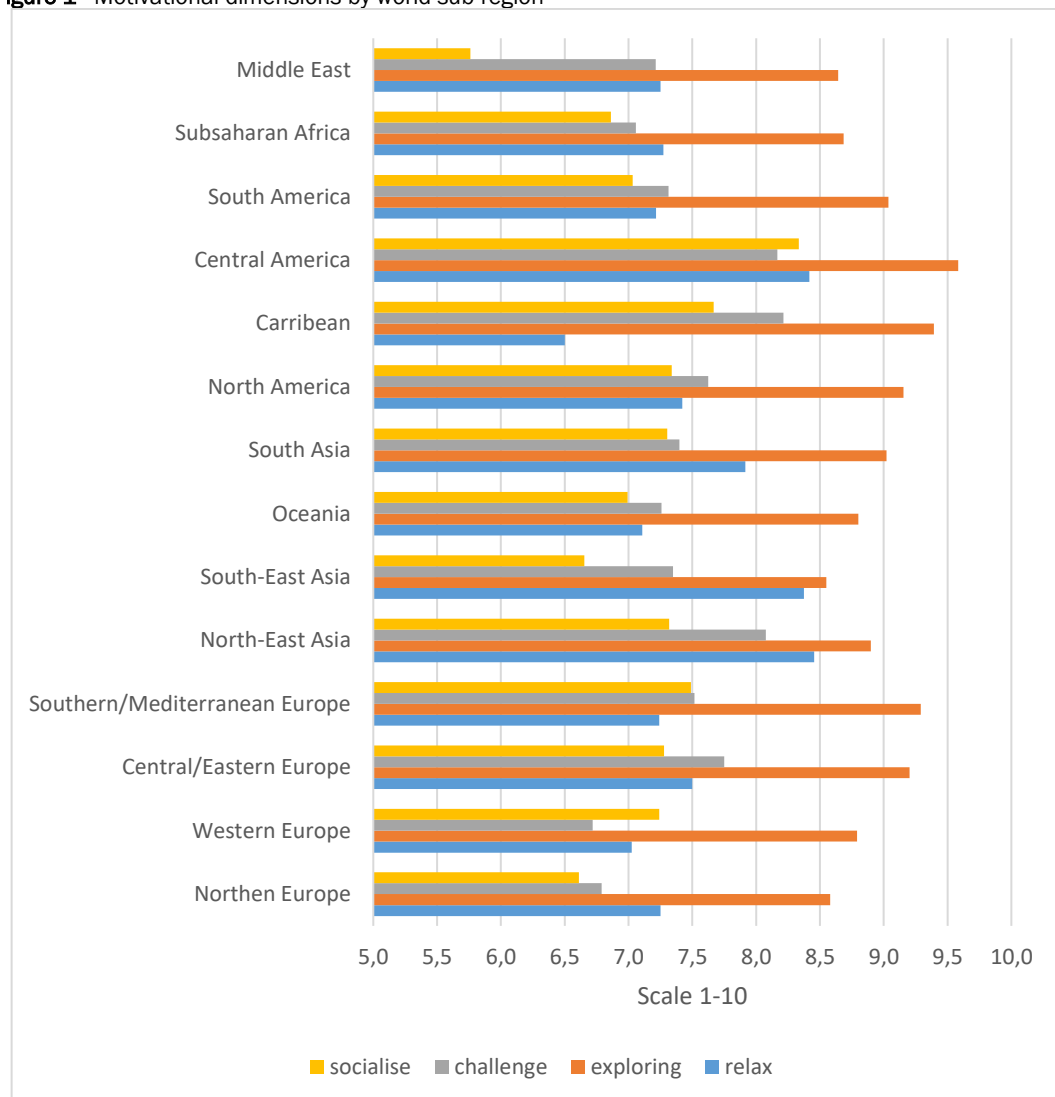
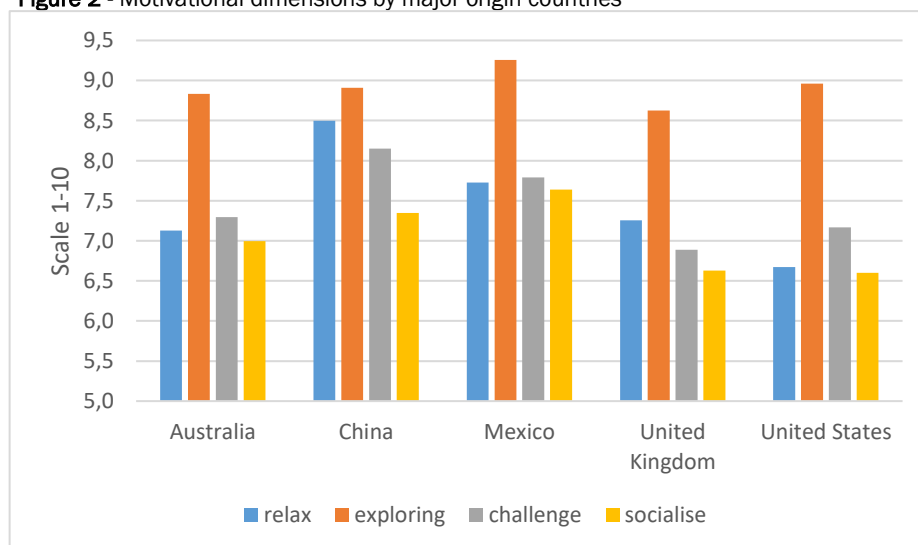
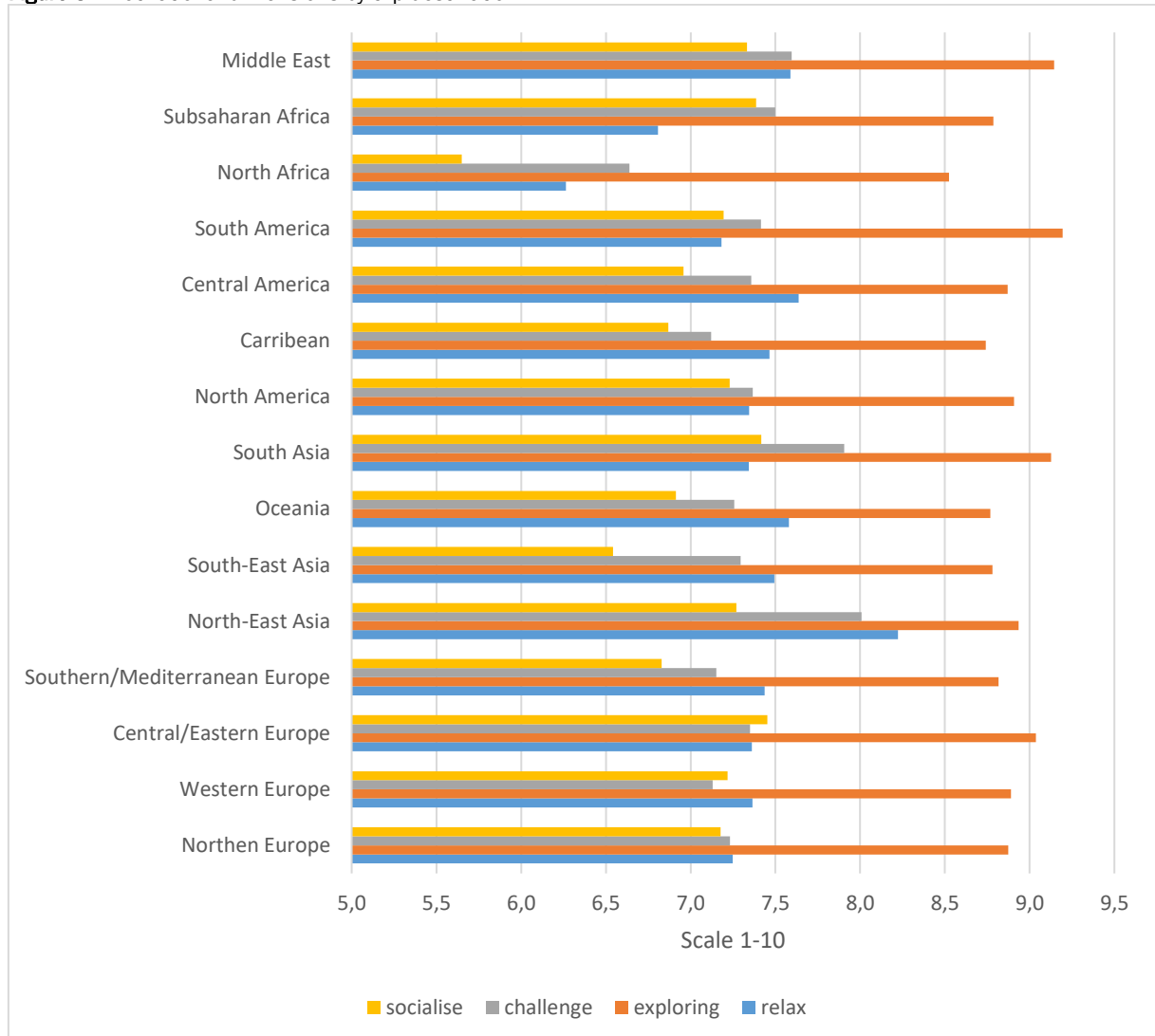


Figure 2 - Motivational dimensions by major origin countries

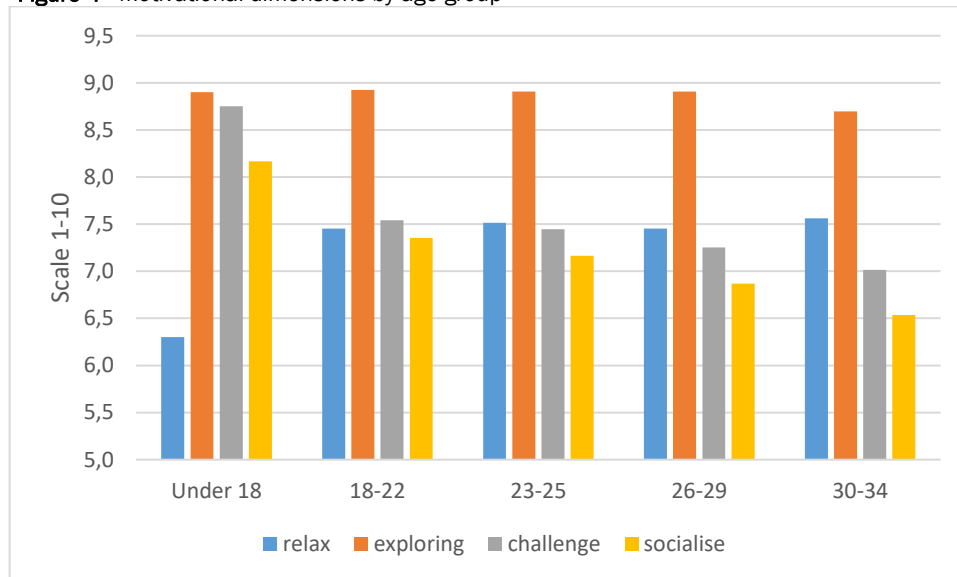


In terms of the main origin countries in the survey (Figure 2), respondents from China were particularly likely to emphasise relaxation and challenge, but they were less motivated by exploration than their Mexican counterparts. For Chinese respondents there is much more of a balance between exploration, relaxation and challenge, whereas travellers from other countries tend to place much more emphasis on exploration in their mix of motivations. Socialising is also a stronger motivation for the Chinese and Mexican Millennials than those from the UK, the USA and Australia.

Figure 3 - Motivational dimensions by trip destination



In terms of trip destination (Figure 3), exploring also emerged as the most important motivational component for all regions. South America, South Asia and the Middle East particularly stood out as destinations linked to exploring motivations. South America in particular has been viewed as the pinnacle of a backpacker 'travel career', and India is also viewed as a prime backpacker destination (Richards and Wilson, 2004). Relaxation was the second most important motivation, and this was particularly important for North-East Asia. This was because of the large number of Chinese Millennials in the survey, for whom trips in their own region were more likely to be shorter, leisure-orientated trips.

Figure 4 - Motivational dimensions by age group

Variations in motivation were also evident in terms of age group (Figure 4). The under-18s, who arguably belong to generation z rather than being Millennials, have a different motivational pattern. They score relatively low on relaxation, and high on challenge. It could be that the younger respondents have relatively little travel experience, and therefore see their trip as much more of an adventure, or challenge, than other respondents. They are also relatively keen to socialise, and they tend to score particularly high on 'building friendships with people from other countries'. This younger age group therefore seems keen to get out into the world, to challenge themselves and make new friends. As age increases, Millennials are progressively less likely to be seeking challenges or opportunities to socialise. This can probably be traced to changes in the life course, as people enter employment and steady relationships. However, the desire to explore remains fairly steady until Millennials are over the age of 30.

Table 5 - Rankings of travel motivations for respondents in the Millennial Traveller Survey (2014) and the New Horizons Survey (2007).

	Ranking 2014	Ranking 2007
Interact with local people	1	7
Increase my knowledge	2	2
Explore other cultures	3	1
Build friendships with people from other countries	4	6
Avoid the hustle and bustle	5	5
Have a good time with friends from home	6	9
Relax physically	7	8
Help people in the destination	8	13
Test and develop my physical abilities	9	12
Visit friends and relatives living abroad	10	4
Meet other travellers	11	10
Relax mentally	12	3
Be in a calm atmosphere	13	11

Interesting insights into the changing nature of Millennial travel motivations can be gained from a comparison of the 2014 survey results with the data from the 2007 New Horizons survey (Table 5). These data indicate that the ranking of travel motivations differs significantly between the two surveys. In particular, the im-

portance of interactions with local people was ranked number 1 in 2014 in terms of the proportion of respondents giving the highest score to this item, compared with a ranking of number 7 in 2007. A desire to make friends in the destination was also ranked higher in 2014 (rank number 4 compared with number 6 in 2007). In contrast visiting friends and relatives abroad was ranked much lower in 2014. Elements related to challenge, such as helping people in the destination or testing physical abilities were also ranked lower in 2014. The most significant ranking change was mental relaxation, which ranked number 3 in 2007, but only 12th in 2014. Although differences in sample composition between the two surveys mean that it is difficult to directly compare the results, the general patterns do indicate a growing interest in interactions with local people rather than fellow travellers, more desire for personal challenge and less interest in relaxation. The relatively constant motivational elements for Millennial travellers seem to be exploring and increasing knowledge, which are the main drivers for travel outside one's own country.

5 DISCUSSION

This international comparison of Millennial travellers indicates that there are significant differences in travel motivations across different world regions. This provides nuances to the general idea that Millennials are a not a coherent global generation with similar desires and behaviours.

In particular, Asian Millennials seem to be different in motivational terms from their European, American or Australasian counterparts. Although they have high desire for exploring the world, just as Millennials elsewhere, they are more focussed on both relaxation and challenge. This reflects the research conducted on Chinese backpackers by Xie (2017), who found that these young travellers were looking for both escape from a constrained home environment as well as the freedom and challenge of travelling individually. Similarly, Mohsin, Lengler, & Chaiya (2017) found that for young Thai travellers in New Zealand experiencing new cultures and experiencing adventure were important motivations. In contrast, successive waves of the New Horizons surveys have indicated that young travellers in other parts of the world have been travelling less often for leisure or escape-based reasons, and more often for extrinsic purposes such as gaining work experience or learning a language (UNWTO, 2016).

A comparison of the results of the Millennial Traveller Survey with previous research does, however, indicate that exploration and encountering other cultures has remained a fairly constant aspect of Millennial travel motivations over the past few years. Young people still seem to have the same basic desire to travel to see and experience new cultures, even if the things they may be looking for in those cultures has changed. In the past, there were more indications that cultural exploration was related to a general notion of universal cultural values and consuming the cultural highlights of a destination. Nowadays the notion of culture seems to be more focussed on the local culture of the destination, and the desire of young travellers to become embedded in the everyday life of the places visited (Russo and Richards, 2016). Even though meaningful contact with local culture may in practice be limited by language and cultural barriers, it seems that young people at least want to feel that they are part of a destination community rather than traditional tourists. This may also explain why the motivation to help people in the destination seems to be more important nowadays.

Our research also indicates that travel motivations are significantly affected both by the origin of Millennial travellers and the destination they travel to. In other words, motivations are related both to the individual travelling and to the specific places they travel to. This seems a fairly logical conclusion, but it differs somewhat from the body of research that stresses the role of home culture in distinguishing between travellers (e.g. Reisinger & Turner, 1997, 2002).

In reporting the results of this research we have to recognise the limitations imposed by the use of a convenience sample, which is common in tourism research, but which may produce significantly different results to a random sample (Gelissen, 2016). The need to access young consumers through travel suppliers also means that the sample obtained is more likely to reflect those purchasing travel through commercial channels, rather than those who might make their own travel arrangements. Although our findings also suggest a relative stability of some elements of the Leisure Motivation Scale, which is useful in making comparisons over time, we should also acknowledge the changing nature of motivations and behaviour over time. This may make it increasingly hard to use a generic scale, which may not capture emerging aspects of travel, such as engagement with new media, for example.

6 CONCLUSIONS

Although Millennials are often treated as a relatively coherent travel generation with similar motivations and behaviour, the current study has identified significant variations in travel motives between world regions and sub-regions. Although the basic desire for exploration is evident as the most important motivational dimension in all world regions, significant differences are also evident. Asian Millennials in particular seem to emphasise relaxation-based motivations, while also combining this with a greater desire for personal challenge. There are also motivational differences evident at the sub-regional level, with areas such as South-East Asia, North-East Asia and Central America in particular travelling for relaxation, and respondents from the Middle East, South East Asia and Northern Europe being significantly less likely to travel for social reasons.

The results presented here arguably have significant implications for the travel industry worldwide, particularly as the composition of the Millennial traveller public is likely to change in the near future. For example, considerable growth is also expected in the Muslim millennial market, with about 60% of the world's 1.8 billion Muslims aged under 30. The value of this market is predicted to rise to \$220 billion and 158 million arrivals in 2020. As well as numerical growth, there will also be qualitative change in the nature of demand. For example, the upcoming "Generation Z is fueled with a desire to make a difference, help the world and change it for the better, therefore authentic experiences are a top priority." (Dunsby, 2019).

These trends are likely to lead to a significant change in the composition of the Millennial traveller market globally, with a corresponding shift in travel motivations and traveller needs. The travel industry will increasingly need to approach the Millennial market not as an homogenous group, but as a series of niche markets with different profiles and travel behaviours (Benckendorff, Moscardo, & Pendergast, 2010).

It is also clear that there is much scope for further research on these important travel consumers. In particular there is a need to understand how travel motivations and behaviour change over the course of the travel career (Pearce and Lee, 2005). Successive waves of the New Horizons research have indicated that different cohorts of young people have behaved differently over time, but more longitudinal research is needed to confirm this. One possibility is to develop travel biographies for different generations of travellers, and to use qualitative data to reconstruct an archaeology of youth travel over recent decades. This might also help us to understand the links between the wide social, economic and geographic contexts of travel and the behaviour of young consumers.

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