



WYSE TRAVEL  
CONFEDERATION

Working for global  
youth travel

## EXECUTIVE SUMMARY

# Millennial Traveller II

An insight into the use of travel agents,  
airlines, tour operators and hostels by  
millennial travellers



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If you have any questions about this report, email us at [research@wysetc.org](mailto:research@wysetc.org).

## THANK YOU TO OUR RESEARCH SPONSORS



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+31 20 421 2800 | [research@wysetc.org](mailto:research@wysetc.org)  
Keizersgracht 174-176 | 1016 DW | Amsterdam | The Netherlands

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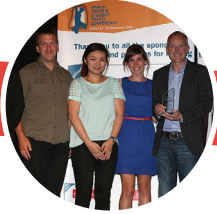
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# ABOUT THE MILLENNIAL TRAVELLER REPORT SERIES

WYSE Travel Confederation is committed to understanding the ever changing characteristics, motivations and needs of young travellers through gathering, analysing and sharing important research data and market intelligence with its members, academics, corporate and government decision-makers, and the general travelling public.

WYSE Travel Confederation designed and conducted its Millennial Traveller survey in June 2014 in order to capture a snapshot of the behaviours, experiences and attitudes of the millennial traveller, a young, yet influential demographic group of travellers born between the early 1980s and the early 2000s.

The Millennial Traveller series presents an analysis of responses regarding destinations, travel services, travel motivations, trip characteristics, use of the internet and mobile technology, plus attitudes towards current political and socio-economic issues through a number of short reports.

Each report is focused on a specific topic or sector of the youth travel industry and highlights issues of importance for the millennial traveller, as well as opportunities for interacting with and serving millennials.

The Millennial Traveller II report focuses on four types of service used by millennial travellers - travel agents, airlines, tour operators and hostels.

## BACKGROUND

Youth, student and educational travel is an increasingly important sector of the international tourism market. Young people are travelling more, travelling further and looking for even more inspiring experiences. The generation now driving youth travel demand is the 'millennials', the demographic cohort born from the early 1980s to the early 2000s.

This generation is characterised by its familiarity with new technologies, having grown up with PCs, mobile phones and the internet. The millennial generation is therefore a highly connected generation that interacts with people and information in ways that are very different from their parents.

Millennial travellers are growing up in a world where travel is easier and relatively cheaper than for previous generations and they are taking full advantage of this to travel the globe in search of new experiences.

## METHODOLOGY

Data for this report was collected via a web-based survey conducted in English. WYSE Travel Confederation members across the world distributed the survey to young travellers via email, social media, newsletters and website postings. An incentive of an iPad prize draw was used to increase response rates.

More than 6,000 responses were collected from over 100 countries. Respondents were asked to answer questions relating to their experiences with different types of travel products. Respondents were also asked about their behaviour while travelling and for their opinions on general issues.

## ABOUT WYSE TRAVEL CONFEDERATION

The World Youth Student and Educational (WYSE) Travel Confederation is a global not-for-profit membership organisation dedicated to promoting and developing opportunities for the youth, student and educational travel industry.

Providing international travel experiences to over 30 million youth and student travellers each year, WYSE Travel Confederation's global community of over 800 members covers more than 120 countries and a diverse range of sectors.

WYSE Travel Confederation is endorsed by UNESCO and is a strategic partner and long-standing affiliate member of the United Nations World Tourism Organization (UNWTO).

## ACKNOWLEDGEMENTS

Thank you to our members who distributed the survey and to the millennial travellers who took part in it.

# EXECUTIVE SUMMARY

## TRAVEL AGENT CLIENT

Travel agents are preferred by younger and older travellers of the millennial generation and millennials are likely to prefer a specialist youth or student agency over a mainstream travel agency.

For millennials that booked through an online travel agent, certain website features are considered important; among them, special offers.

## TOUR OPERATOR USER

Special offers were also identified by millennials as an important element of a tour operator's website. Millennials that used tour operators had longer booking times when compared to other millennial travellers. Cost was identified as the most important factor for choosing travel agents and tour operators.

## AIRLINE PASSENGER

Planning well in advance is no problem for millennials, with more than half reporting that they booked flights at least three months before departure.

Airline punctuality was ranked by millennials as one of the top three factors that make a great airline. Surprisingly, in-flight WiFi was not ranked among the most important factors.

When asked about their experiences with low-cost airlines, millennials ranked hand luggage restrictions as the most annoying aspect of the budget airlines. Seventy-one percent of millennials said that they read airline magazines.

When asked about flight innovations that they would be willing to pay for, millennials ranked 'standing for a discount' as the top airline innovation they would support.

## HOSTEL GUEST

Millennials that stayed at hostels spent an average of EUR 1,522 on their last main trip and named 'good transport links' as a key destination feature.

Hostel bookings made via a smartphone or tablet accounted for 14% of bookings. Accommodation bookings via mobile device are a small, but rising proportion when compared to the 6% reported in 2013.

Location and free WiFi were among the most important hostel features for millennials. Extras such as bike rentals, a restaurant or a bar, were not ranked as the most important features for millennials when considering a hostel.

Hostel users are avid experience seekers and more than 80% said that they travel to collect memories and experience the local culture, as well as experiment with new food and meet other travellers.

## COST

MOST IMPORTANT  
WHEN CHOOSING  
TRAVEL AGENTS  
AND TOUR  
OPERATORS

54% WOULD SUPPORT  
STANDING ON A FLIGHT  
FOR A DISCOUNT



## IMPORTANT HOSTEL FEATURES



LOCATION



FREE WIFI

IMPORTANT ONLINE  
CONSIDERATIONS FOR  
TRAVEL AGENTS AND  
TOUR OPERATORS



14% OF  
HOSTEL  
GUESTS  
BOOKED  
WITH A  
MOBILE  
PHONE



HAND LUGGAGE  
RESTRICTIONS - THE  
MOST ANNOYING  
ASPECT OF LOW-COST  
AIRLINES

# ABOUT THE WYSE TRAVEL CONFEDERATION RESEARCH PROGRAMME

The WYSE Travel Confederation research programme provides the youth travel community with the data and market intelligence it needs to develop the policies, services, and products that make international travel and educational experiences exciting, safe, accessible, and affordable for young people. WYSE Travel Confederation's research programme comprises:

## 1. PRIMARY DATA COLLECTION AND ANALYSIS

WYSE Travel Confederation designs and conducts its own research on the youth travel market through surveys of consumers and suppliers. This provides up-to-date information on business trends across different sectors of the market and provides the basis for benchmarking.

Regularly produced reports include the New Horizons studies, the STAY WYSE Youth Travel Accommodation study and the IAPA Au Pair survey. The Millennial Traveller survey builds on the information collected in these studies and adds more data on specific sectors of the industry.

## 2. INDUSTRY REVIEW SERIES

The industry review series compiles current data from secondary sources on industry matters that affect WYSE Travel Confederation members' businesses. The series investigates areas such as youth travel market dynamics, mobility, pricing, customer preferences and marketing.

## 3. RESEARCH ON DEMAND

WYSE Travel Confederation members have the opportunity to commission research specific to their sector and business needs.

For more information on our research programme, visit [www.wysetc.org/research](http://www.wysetc.org/research).



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## CHAMPIONING THE YOUTH AND STUDENT TRAVEL INDUSTRY

The World Youth Student and Educational (WYSE) Travel Confederation is the world's largest and most powerful network of youth and student travel operators.

We are the global not-for-profit membership organisation dedicated to supporting this unique market, which generated an estimated US\$230 billion in 2013.

Our network of over 800 members in more than 120 countries serves in excess of 30 million travellers each year across all aspects of youth and student travel.

### JOIN US TODAY AND BENEFIT

- **Networking and trading** – we can help you connect with organisations to enable you to grow your business
- **Discounts on industry events** – preferential registration rates for major events, including WYSTC and WETM-IAC
- **Industry research** – free, accurate and reliable industry intelligence and market research
- **Education** – free access to WYSE Webinars, interactive workshops and educational sessions on various topics
- **Marketing and sponsorship opportunities** – we offer a wide range of promotional and sponsorship opportunities to help you promote your business to a wider audience
- **A mark of quality** – use the WYSE Travel Confederation logo as a symbol of quality on your organisation's marketing materials
- **Industry updates** – receive regular eNewsletters, news alerts and press releases
- **Policy work and representation** – we work extensively with the UNWTO, European Commission, and on major governments' industry campaigns so can help your voice to be heard.



### SECTOR SPECIFIC SUPPORT FOR YOUTH AND STUDENT TRAVEL ORGANISATIONS

As a member of one or more of our sector associations, your organisation can benefit from specific networking and trading opportunities, industry research and market intelligence.



+31 20 421 2800

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