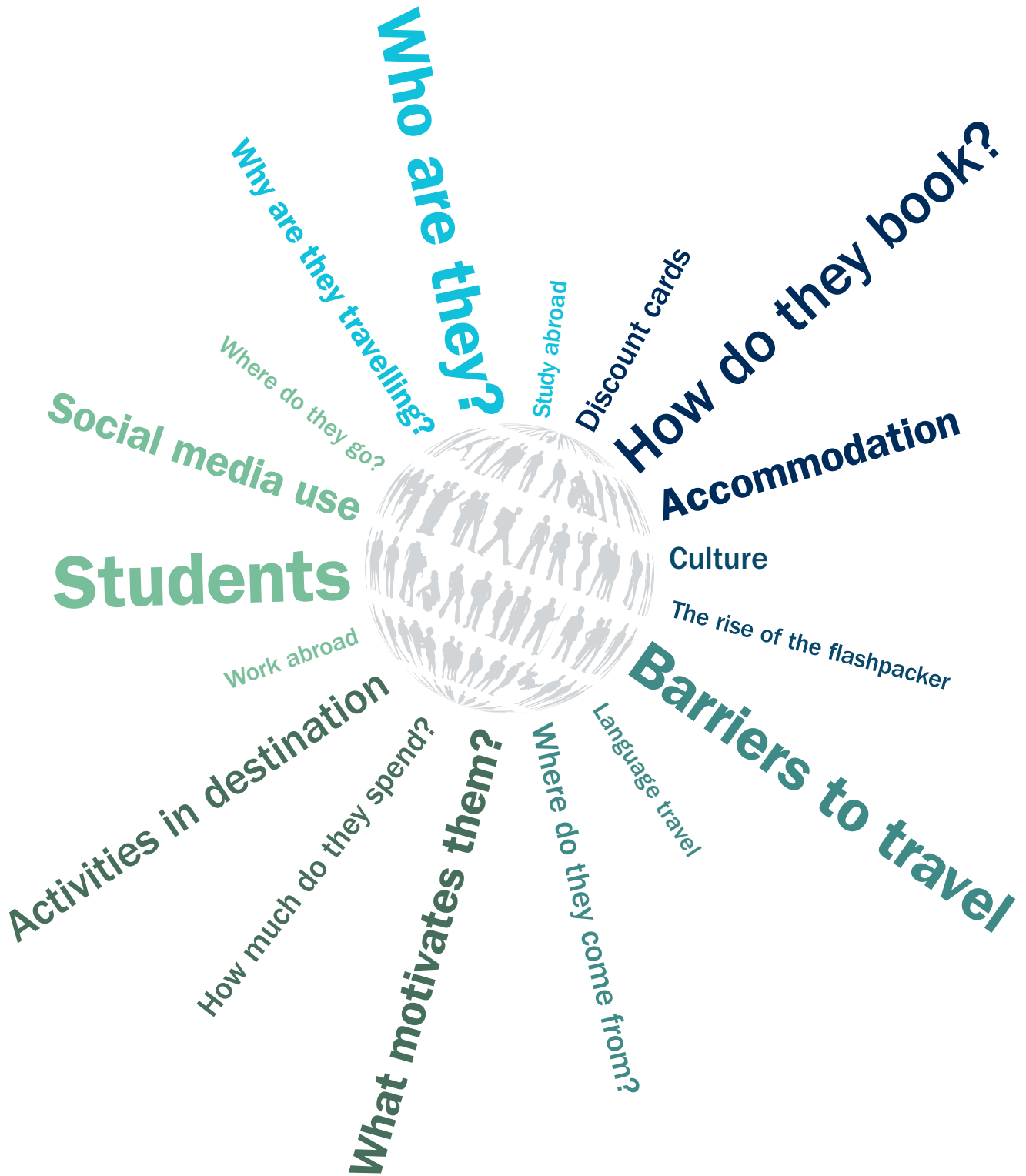


# NEW HORIZONS III EXECUTIVE SUMMARY

A global study of the youth and student traveller



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**WYSE TRAVEL  
CONFEDERATION**

# **NEW HORIZONS III**

## **RESEARCH PROGRAMME**

WYSE Travel Confederation is committed to understanding the ever changing characteristics, motivations and needs of young travellers. WYSE Travel Confederation gathers, analyses and shares important research data and market intelligence with their members, academics, corporate and government decision-makers, and the general travelling public.

Our investment in research and market intelligence informs the policies, services and products which make international travel and educational experiences exciting, safe, accessible and affordable for young people.

Please visit [www.wysetc.org](http://www.wysetc.org) for more information about the WYSE Travel Confederation research programme and how to become a member.

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**Survey Manager:** Laura Daly

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# FOREWORD

## Taleb Rifai, Secretary General, UNWTO



Tourism continues to be one of the fastest growing sectors in the global economy. Today, there are over one billion people traveling the world, and that number is forecasted to grow even further to 1.8 billion people in 2030.

This impressive growth is welcome news considering the challenging economic climate. As a sector representing 9% of the GDP, more than US\$ 1 trillion in exports and one in eleven jobs worldwide, tourism's sustained growth means increased employment and socioeconomic development.

Among the over one billion people crossing international borders is an increasing number of young people. Youth travel has become one of the fastest growing and dynamic segments of global tourism. The findings in the New Horizons III survey confirm this growth, signifying the increasing participation and contribution of the youth to global dialogue and development. Today, not only are more young people traveling, they are also taking advantage of the enriching experience that travel brings, from gaining new skills to learning more about themselves outside their comfort zone.

Travel is one of the best educational experiences. By immersing themselves in other cultures, learning foreign languages and experiencing different ways of thinking, young people broaden their perspectives, become aware of global issues, and infuse the values of respect and tolerance in an increasingly diverse world.

Yet young people today are also faced with issues of political and economic uncertainty, which pose them inevitable questions about their future security and prosperity. As such, the political value of encouraging youth to travel cannot be overlooked.

Tourism can only make its fullest contribution to the world's economic and social wellbeing if governments are awake to the potential of youth travel and fully understand its impact on destinations. This is why carrying out vital research like New Horizons is so important.

On behalf of the World Tourism Organization (UNWTO), I congratulate the WYSE Travel Confederation for its continued work and promotion of sustainable and ethical development of the youth travel sector and reassure all of UNWTO's commitment to promote youth tourism. By working together, we bridge the gap of generations and collaborate in shaping a better future.

# FOREWORD

## David Chapman, Director General, WYSE Travel Confederation



The New Horizons III study of 2012 and 2013 updates a benchmark study conducted in 2002 and again in 2007 which identified the motivations and unique travel characteristics of the millions strong global movement of young travellers. Thanks to the help of WYSE Travel Confederation members, this study has seen a significant increase in responses, with the 2013 report collecting over 34,000 responses. Through this updated study, WYSE Travel Confederation endeavours to further advance an understanding of the unique travel motivations, activities, communications, booking and spending habits of young travellers.

This study concludes that travel is an increasingly important aspiration for young people around the world. Despite the global financial crisis affecting all countries, some more than others, travelling has become an essential rite of passage to many young people, filling the gap between education and work whilst adding travel and cultural experiences as a vital new dimension to their CVs which helps them to compete in the fiercely fought recruitment market place.

The report also shows that young people continue to identify themselves as ‘travellers’ rather than tourists, and that they are exploring further, spending more, and demanding new types of experiences to fulfil their desire to learn about and discover the world around them, a situation that remains at the forefront across all the surveys.

The global movement of young travellers generates exceptional financial and social value. The value of Youth Travel in 2007 was estimated as \$143 billion and at the end of 2012 according to the UNWTO, this had risen by 28% to \$183 billion with young people accounting for nearly 20% of all international arrivals.

WYSE Travel Confederation is encouraged that the social value of youth travel is becoming better understood by governments, industry and social sector organisations around the world. Reports such as New Horizons III provide solid evidence that international travel experiences are an essential part of young people’s personal and educational development, feeds their curiosity of other cultures, and contributes to the “openness” that underpins international understanding. There is still plenty of work to do on this topic, youth travel still doesn’t have the full recognition that it deserves and is still referred to as a niche market in some areas.

I would like to thank the many members of WYSE Travel Confederation and all the other industry contacts who helped collect the data for this study and also Laura Daly and her team at WYSE Travel Confederation who chased in the returns and made sure that this study’s sample was the biggest and the most relevant youth and student travel studies ever done.

Finally, WYSE Travel Confederation wishes to extend a special thank you to Professor Greg Richards, the report’s lead author and researcher. Greg’s involvement and interest in this fascinating market has made him the world’s leading research authority on youth and student travel. Greg’s understanding of the data and the industry, along with his commitment to quality research on this market has allowed us to better understand and serve the needs of millions of young travellers and to help develop the business interests of our members that serve this robust and vibrant business.

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# INTRODUCTION

This is the third New Horizons survey of global youth and student travel conducted by the World Youth Student and Educational Travel Confederation (WYSE Travel Confederation). The aim of the survey is to provide an overview of the global youth and student travel market, which was estimated to include over 200 million international trips in 2012.

The New Horizons research is the only consistent global survey of this important market. Since 2002 the survey has expanded in both scale and scope, and now represents responses from over 34,000 travellers in late 2012 and early 2013, drawn from 137 different countries.

The latest report analyses why young people travel, how they travel, where they travel to, what they do in the destination, what impact their travel has on them and what economic impact they have in the destination.

Travel is changing rapidly and the youth travel market is at the forefront of that change; pioneering new destinations, new travel technology, new travel experiences and new forms of accommodation. The youth travel market will continue to grow in future thanks to the growing numbers of young people able to travel abroad. As The Futures Company (2013) points out: “A decade ago, the number of international tourist arrivals from emerging countries was just under half the figure for arrivals from mature markets. Now the figures are almost equal.”

The qualitative nature of youth travel is also changing as young people seek out more engaging experiences. The last decade has seen a shift towards cultural tourism, creative tourism and now towards ‘relational tourism’ as people want to connect to the places they visit (Richards, 2013). Hostels are becoming social hubs for travellers and locals, and new ‘Live like a Local’ products are springing up in cities across the globe.

Young travellers are also becoming increasingly technology savvy and knowledgeable about the places and people they visit. As The Futures Company remarks: “Guests have a wealth of information at their fingertips, so they expect the concierge department to be as informed as they are – and then some! The importance of networking – contacts who can help make the impossible possible – is paramount in this day and age. We need to be one step ahead of what is ‘available’ online.”

Younger generations no longer travel just to ‘discover’ themselves, but to say something about themselves to their social peers. It may even be that these travellers now think about an experience in terms of how they will share it with others. For many younger travellers, the experience becomes real when it is posted and viewed by someone else. The youth and student travel industry of the future will not only need to offer great experiences, but also help young people tell great stories about those experiences.



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# INTRODUCTION

## YOUTH TRAVEL RESEARCH

There is a growing body of research on the youth travel market, stimulated amongst other things by the WYSE Travel Confederation research programme launched in 2001. The New Horizons study forms the backbone of the WYSE Travel Confederation research because it provides an overview of all sectors of the market and regularly updates travel trends. The New Horizons research has been supplemented by more specialised research projects on different market sectors, including the STAY WYSE Youth Travel Accommodation Study and the Cultural Impacts of Travel research.

Overall the aim of the WYSE Travel Confederation research programme is to provide the youth and student 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. The research programme comprises of three main elements:

## PRIMARY DATA COLLECTION AND ANALYSIS

WYSE Travel Confederation and its research partners design and conduct research on the youth and student 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.

## INDUSTRY REVIEW SERIES

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

## RESEARCH ON DEMAND

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

## REVIEW OF RECENT YOUTH TRAVEL RESEARCH

The amount of research on youth travel and its constituent sectors has been increasing in recent years as the scale, professionalism and recognition of the industry has grown. In addition to a growing body of academic research, there are now many companies and research organisations who regularly review the market.

For example Hostelbookers have carried out a number of surveys of their customers in the past few years. In 2010 the surveys covered over 15,000 respondents. As with many other surveys of the youth travel market, the Hostelbookers research had a majority of female participants (60%). The main motivations for travel were 'sightseeing and culture' (80.7%), followed by 'city break' (47%) and 'visiting friends and family' (44.6%). Travel budgets increased, as 40% of respondents spent over €30 a day, compared with 28% in 2009. The effects of the economic crisis were reflected in an increased number of people taking 'no trips', but this was still just over 5% in 2010.

Research by the Katholieke Hogeschool Brugge Oostende (van Ocken, 2012) indicated that an even smaller proportion of young people (16-25) in Flanders were not travelling – less than 2% of respondents had not travelled abroad in 2012. Over half the young people surveyed made at least four international trips in 2012, with over a quarter travelling for 29 days or more in total. Because the sample for this study was relatively young, many travelled with their parents, and on average almost 50% of the total cost was covered by the parents. Just as in the New Horizons research, parental contributions fall sharply as age increases.

One of the trends noted in the New Horizons research, the rise of the flashpacker, has also been noted in other studies. In a scenario study on the future of youth tourism, van Vals (2012) compares the 'old' backpackers and the 'new' flashpackers. The flashpackers are older (mainly over 30), have less contact with locals (but are more virtually connected with home),

travel on a higher budget for a shorter time, use a wider variety of accommodation and undertake more organised activities to make better use of their pressured time. Similarly Paris (2012) distinguished flashpackers on the basis of travelling with a laptop or video camera, a budget of at least \$1,000 a week and frequent use of social media. He found that more than 75% of flashpackers travelled with a laptop and that they not surprisingly favoured hostels with free wi-fi access. He found that the flashpackers were predominantly male (62%) in contrast to the usual gender balance of backpackers.

The traditional backpacker is still more important in terms of numbers, however, and makes a considerable impact on key destinations. In Australia, for example, research shows that the average length of stay for a backpacker was 71 nights in 2012, with total overnights rising even though the number of backpackers fell. Research in New South Wales (2011) indicated that visitors travelling beyond the Sydney gateway were more likely to be backpackers (38%) and least likely to be with a tour group (4%). This underlines the importance of youth travellers in travelling beyond major hubs and supporting regional destination development. The TNT Backpackers Uncovered survey (2010) indicated that 75% of backpackers had a travel budget of more than AUD 4,000, and nearly a quarter spent more than AUD 10,000. Almost half the respondents were intending to work in Australia and half said that they would consider returning to live and work there in the future.

Recent research on emerging youth travel destinations shows how it has spread. For example research in Ghana (Dayour, 2013) looked at the motivations of backpackers on the Cape Coast. This indicated that the predominantly female respondents (73%) were

mainly students (58%) motivated by culture and heritage, tourist services and nature. The study recommended that more hostel accommodation should be developed to tap into this potentially important market. In South Africa the City of Cape Town (2011) undertook a study of the backpacker market. They found that backpackers were predominantly between the ages of 21 to 25, staying 42 days on average, with a budget of SAR 10,000 or less, and want to interact with locals. They participate in visiting natural sites, museums, townships and historical sites, game viewing, and night life.

The emergence of youth travel sectors is also increasingly visible in research. For example Miller's (2012) study of volunteer travel found that 'volunteer experiences improve global citizenship and participants desire to become more involved in future activism upon their return home'. The European Youth Forum (2011) conducted research on internships, and concluded that 'doing internships have become the norm for many young Europeans and that the costs associated with them are accepted as necessary to secure future employment.'

The longer term impacts of youth travel are revealed by Brightspark Edu-Travel Report (2011), which surveyed over 500 American entrepreneurial and business leaders. Over 90% of respondents strongly agreed that being well travelled was a competitive advantage in the workplace. In common with the New Horizons research, the poll found that student travel fosters an appreciation for diversity, an appreciation and acceptance of cultural differences and helps to build confidence. Almost all the respondents agreed that the increased cultural awareness provided by youth travel enhances opportunities for success by enabling you to connect to others more easily.





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# EXECUTIVE SUMMARY

## WHO ARE THE YOUNG TRAVELLERS?

Respondents to the New Horizons survey were more often female (67%) and the 20-25 age group accounted for over half of all responses. The over 30 age group has grown consistently over the past 10 years, and now accounts for over 17% of respondents.

Over half of the young travellers sampled had a Bachelor's degree and almost 12% had a postgraduate qualification. In line with the increased age of respondents the proportion of students fell to just under 60%.

## TRAVEL STYLE

The proportion of 'backpackers' and 'travellers' fell again in 2012/13, but the share of 'tourists' increased. This reflects the growth of new markets in areas such as Asia where the 'tourist' tag is not viewed as negatively as in Europe or North America. The number of people identifying with other labels, most notably flashpacker, more than doubled compared with 2007.

In general, younger people are more likely to see themselves as tourists, whereas the over 25s were more inclined to identify with the traveller or backpacker label. These styles tend to be attached to having more travel experience. Backpackers were particularly likely to come from, or be travelling in Oceania, where backpacker infrastructure is very developed. Almost half of the flashpackers used hotels, compared with only 29% of backpackers, who not surprisingly were more likely to be staying in 'backpacker' hostels.

## WHY ARE THEY TRAVELLING?

There has been little change in basic travel motivations in the past 10 years. Having a cultural experience, exploring new cultures, learning new things and meeting local people are the most common motivations (all mentioned by over 80% of respondents). Social motivations, such as building friendships were much more strongly related to the use of hostel-type accommodation or couchsurfing than to the use of hotel accommodation.

The main purpose of trip remains holiday (47% of trips), although this is far less than in 2002 or 2007. In contrast the proportions of people travelling to learn a language (22%), to gain work experience (15%) or to study (15%) have increased. This seems to underline a more instrumental approach to travel at a time of youth unemployment. Those going on holiday tended to have relaxation related motives, but those travelling for work or study were more likely to be increasing their knowledge.

## PREVIOUS TRAVEL EXPERIENCE

The average young traveller had made six international short trips and five long trips (more than seven nights) in the last five years. Although the total number of trips taken has declined compared with the period 2002-2007, the number of trips rose during 2012/13, indicating a recent upswing.

Much travel experience is now gained outside of the world region in which they live, with an average of 10 inter-regional trips having been made during their lifetime. Travellers from North America and the Asia-Pacific region are rapidly catching up with their European counterparts in terms of inter-regional travel experience. Young people are clearly building a travel career, as they tend to visit more distant regions as they get older.

### LIVING ABROAD

Many young people are now living outside their country of origin as a result of permanent or temporary migration. Just under 11% were living in a different country and they were more likely to be students, have a higher education level and a higher income. Those living abroad were less likely to see themselves as tourists and more likely to see themselves as 'global nomads' or 'locals' than other travellers. They tend to stay more often with friends and relatives when travelling (25%). Those living abroad were almost twice as likely to 'Live like a Local' when they travelled.

### PLANNING THE TRIP

Travellers use a much wider range of information sources now than they did five years ago, with increased use of the Internet, social media and mobile devices. Family and friends are still the most important single information source, but there is growing use of destination and review websites. The number of different sources consulted jumped from an average of four in 2007 to over nine in 2012/13.

Almost half of the young travellers 'suddenly had time available' or were influenced by special offers or special events. This shows that marketing actions can have a strong influence on the youth and student market, which is often more flexible than other segments.

### GETTING THERE

The use of air travel has grown significantly, from around 16% of trips in 2007 to 26% in 2012/13. This growth is largely due to budget airlines. Only flashpackers make significantly more use of scheduled airlines.

### WHERE DO THEY STAY?

Hostels are still the most important form of youth travel accommodation, used by 32% of respondents. Hotels (31%) are also very important, but these tend to be favoured by flashpackers and tourists rather than backpackers.

Young travellers spent less time in major gateway cities (51%) in 2012/13, with more time spent in smaller cities and rural areas. Volunteers and backpackers are particularly likely to travel to less accessible areas, tourists were more likely to stick to major cities.

### TRIP LENGTH

The average length of the main trip was around 58 days in 2012/13, longer than the average trip in 2007 (52 days) but about the same as in 2002. Although two-thirds of trips are still less than a month in duration, there was a growth in trips of over 60 days in 2012/13. Volunteers (67 days) and backpackers (63 days) take the longest trips on average, tourists the shortest. Trip length generally declines with age as more young people enter full-time employment.

### HOW MUCH DO THEY SPEND?

The average total spend was just under €3,000 in 2012/13, a growth of 40% since 2007. Spending on youth travel grew at around 9% a year, compared with 3% for international tourism as a whole. Those spending most on their main trip tend to be travelling for study (€3,640) or language learning (€3,500). Flashpackers tend to spend most on their trips, tourists the least.

## EXECUTIVE SUMMARY

Almost two-thirds of travellers had a discount card in 2012/13, almost a third of whom used it weekly while travelling. The main discounts that they want are on accommodation (42%) and travel (22%).

In spite of their relatively low incomes, young people are able to raise their spending power by saving (28% of the average budget) and parental funding (24%). As age increases parental contributions drop off sharply, from 44% for under 20s to only 5% for over 30s. Parents are most likely to contribute to educational travel and least likely to fund holiday travel.

### ACTIVITIES IN THE DESTINATION

The most frequent activities are sitting in cafes/restaurants, shopping and visiting historical sites, which were all mentioned by more than half of the respondents. More active sports and adrenaline activities were undertaken in Oceania, volunteering in Africa and South America, while those visiting North America were most likely to be working and earning money.

Those in the 20-22 age group were most likely to be working during their travels (24%), while only 3% of those aged 35 and over did so. About 60% of activities were 'tourist activities' and flashpackers and tourists were most likely to engage in these.

### KEEPING IN TOUCH

Young people are increasingly in touch with home and with fellow travellers while on the road. Social media has played a particularly important role, becoming the main form of daily communication in 2012. Social media is particularly important for younger travellers: almost 40% of 20-22 year olds used social media every day, compared with just over 20% of those aged 35 and over. Most people communicate less on the road, largely because of cost (37%) or because they need a break from home (34%).

The main information sources consulted while on the road are family and friends (44%) and tourist information offices (40%). Social media was only used as an information source by around 20% of respondents, but levels varied from 25% in North America to only 7% in Africa.

### REFLECTING ON THE TRIP

The benefits gained from travel have changed little in the past five years, with a thirst for more travel (92%), more appreciation of other cultures (90%) and an interest in learning about other cultures (89%) being rated most important. More appreciation of other cultures was particularly likely to be gained by volunteers and flashpackers, and by those respondents in their 20s.

The perceived cultural benefits of travel are particularly important for younger travellers and tend to decline slightly as people gain more travel experience. In general, those travelling for work, study or volunteering were more likely to perceive cultural and personal benefits from travel than those on a holiday.

### BARRIERS TO TRAVEL

There is evidence that problems such as terrorism, crime, war, natural disasters and epidemics are having an increasing effect on travel plans. Although the vast majority of travellers said their plans were unaffected, the number of people altering or postponing travel plans grew in 2012/13 compared with 2007.

Young people travelling to South and North America were most likely to be avoiding certain places during their trip, but those with more travel experience tend to be least affected by such problems.

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700 ROOMS	250 ROOMS	150 ROOMS	240 ROOMS	320 ROOMS	390 ROOMS	460 ROOMS	300 ROOMS	540 ROOMS	
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# CONCLUSIONS

The 2013 edition of the New Horizons research shows that the youth and student travel market has continued to expand and diversify over the past decade. Young people are travelling more, visiting more destinations in more parts of the world than ever before. This is having a significant effect on them and the places they visit.

Young people benefit substantially from their travel experiences, coming home with more cultural appreciation and understanding of the places they visit. They leave behind them not only new friends, but also considerable economic benefits, as youth travellers continue to spend more on their main trips than many other tourists. This money also tends to be more widely spread in the destination and is also more likely to end up in local communities, because it tends to be spent with smaller, locally based businesses.

The most obvious shift in youth and student travel in the past five years has been the growth of social media and mobile communications, which have revolutionised the way that people interact with travel products and gather information. Young travellers are now using more diverse sources of information and are also beginning to use new mobile media to search for information and book travel products while travelling.

The changing nature of youth travel is also reflected in shifts in travel style and behaviour. The traditional 'backpacker' is no longer such a dominant figure, having been joined by other traveller types, notably the flashpacker. The rise of the flashpacker in particular is linked to the gradual aging of the 'youth traveller', underlining the fact that youth travel is increasingly a lifestyle rather than a specific age group. People who are attracted to the flexible and social nature of travelling when young increasingly want to hang on to this travel style into their 30s or even longer. This is also an important factor driving the expansion of youth travel and the youth travel industry, which is also becoming more professional as the demands of young travellers with higher levels of travel experience become greater. For the youth traveller, hostels are just as important as hotels, and the supply of hostel-type accommodation is growing in response to increased demand.

These trends indicate continued growth for youth tourism in the future, particularly as demand grows from new emerging markets and young people continue to view travel not just as a form of leisure but also as an essential part of their personal development. The current research also continues to underline the high value of youth and student travel, as young people spend far more than the average tourist on their major trips. The growth rate of youth travel spending has also exceeded the growth in global tourism spend per trip over the past five years.

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