Summary Report

New Horizons in Independent Youth and Student Travel

Today's Youth Travellers:
Tomorrow's Global Nomads

A Report for the International Student Travel Confederation (ISTC) and the Association of Tourism and Leisure Education (ATLAS) by Greg Richards and Julie Wilson
September 2003
International Student Travel Confederation
Serving student travellers for over 50 years, the ISTC has grown from a concept formulated by student leaders to increase international understanding into a global network of the world’s leading student travel organisations. Today’s specialist student travel organisations in 106 countries serve the 21st century’s sophisticated student traveller with special flight ticket arrangements on more than 80 airlines, their own globally accepted student identity card and a full range of surface travel, study and work abroad, adventure and cultural experience programmes – providing educational experiences through travel to over 10 million students and youth travellers each year.

Association of Tourism and Leisure Education
The Association for Tourism and Leisure Education (ATLAS) was established in 1991 to develop transnational educational initiatives in tourism and leisure. ATLAS provides a forum to promote staff and student exchange, transnational research and to facilitate curriculum and professional development. ATLAS currently has members in more than 50 countries.

Bibliographic and Ordering Information
Authors: Richards, G. and Wilson, J. Year: 2003
Title: New Horizons in Independent Youth and Student Travel. A Report for the International Student Travel Confederation (ISTC) and the Association of Tourism and Leisure Education (ATLAS).
Publisher: Amsterdam: International Student Travel Confederation (ISTC)
Preface

This study began four years ago as a modest ISTC project to compile a review of existing studies on the characteristics of the modern student traveller and research on the student travel market. The ISTC sought help from the world’s leading travel research authorities and came up with the same answer each time; that there was almost no market research on this sector.

But it was an accepted fact that students and young people are the fastest growing travel niche, accounting for one in five international travellers. They are served by a multi billion dollar specialist niche industry that has grown and become increasingly sophisticated in meeting their specialist demands and is arguably the most successful niche market in the travel industry.

It was time for a study on the global phenomena of Student and Youth travellers.

Greg Richards, then co-ordinator of ATLAS, had a similar interest. Over the next three years, ATLAS worked with the ISTC on ‘Today’s Youth Travellers: Tomorrow’s Global Nomads’, the first ever, global study of student and youth travellers conducted using primary research.

ATLAS created the ‘Backpackers Research Group’, an international network of academics involved in studies of student and youth travel, which exploded the myth that there was little or no research on this market by assembling the first comprehensive bibliography of research work on the young independent traveller. This body of work covers the psychological, economic, market and personal development impact of the young traveller and is used as an important context to ‘Today’s Youth Travellers: Tomorrow’s Global Nomads’.

Savvy, informed by the Internet and motivated to equip themselves for life in a global society, young people stay longer, spend more than the average tourist and mix their travel experiences with adventure, study, work and relaxation. No longer the ‘lone drifter’, they travel to become a part of the ‘on the road’ global community of millions of young travellers, united and inspired by their ‘not a tourist’ self-identity.

Societal support for the value of student and youth travel is increasing. Educational institutions, potential employers and parents – many of whom were the last generation of young travellers – recognise travel as an important personal development experience and a way of creating greater international understanding in our world.

ISTC thanks Greg Richards and Julie Wilson for their vision, dedication and attention to detail in the conduct and analysis of this survey project. Their efforts make a significant contribution to the worthy cause of promoting Student and Youth travel.

David Jones
Director General
ISTC
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Executive Summary

This summary of ‘Today’s Youth Travellers: Tomorrow’s Global Nomads’ highlights the main findings of a major transnational survey on independent youth and student travel, undertaken by the International Student Travel Confederation (ISTC) and the Association of Leisure and Tourism Education (ATLAS) – a unique research partnership dedicated to understanding the youth and student travel phenomenon.

The aim of the survey was to gather consistent and detailed transnational information on the youth and student independent traveller market, combining data on the social and cultural aspects of young travellers (their backgrounds, motivations and experiences) with data on travel purchases, information gathering, destinations and previous travel experience. It focuses on different dimensions of the last major trip made by youth and student respondents, who were contacted via ISTC’s global network of student travel organisations. Responses have been drawn from 2,300 young people and students from Canada, the Czech Republic, Hong Kong, Mexico, Slovenia, South Africa, Sweden and the UK.

The survey is unique as the first specific study to cover all aspects of the youth and student travel experience, or the ‘whole journey’: from trip planning and booking through to the trip itself. The methodology is also unique in that it is based on primary research at a global level with young people themselves, rather than by deriving conclusions from national tourism statistics. The study draws together existing academic and market-based studies on youth and student travel into a comprehensive bibliography.

The decision to travel

The first step in any journey is the decision to get up and go. This section examines who is travelling and why.

Who are the travellers?

- The majority are students, aged under 26 years and with a high education level.
- Although they tend to have lower incomes (51% earning less than $5,000 per annum), they are clearly prepared to save and/or work during their travels to significantly increase their spending power.
- Over half identify themselves as ‘travellers’, around a third as ‘backpackers’ and around a fifth as ‘tourists’. This self-identification, or ‘travel style’, category was used to shed light on various other findings of the survey and is clearly important, as many differences were evident according to travel style.

Why are young people and students travelling?

- The main motivation tends to be to explore other cultures (83%), followed by excitement (74%) and increasing knowledge (69%) – demonstrating the desire to encounter ‘different’ people and places.
- Those identifying themselves as ‘backpackers’ tend to be more ‘experience seekers’ looking for contact with their fellow travellers. Those identifying themselves as ‘travellers’ have more social motives and are more likely to be visiting friends and relatives during their trip. It is those identifying themselves as ‘tourists’ who are more likely to be looking for relaxation on their trip.
- Younger travellers (under 26) place more emphasis on social contact and excitement, while slightly older travellers are seeking more individualised experiences, and are less in search of extreme experiences.
Long trips are clearly seen as a ‘once in a lifetime opportunity’ for many young people and students and they are prepared to dedicate a lot of time, energy and money to ensure their trip, becomes just that.

How much travel experience do they already have?
- Young people and students’ previous travel experience is considerable. The average number of previous trips outside of their home regions is six, with those over 26 averaging eight previous trips.
- The trips tend to include at least two different countries, and for more experienced travellers, the number of countries increases. Those travelling for longer visit more countries.

Planning the trip
Having decided to travel, how do young people and students go about finding information and booking their trip?

What information sources do they use for planning their trip?
- The main information sources used in planning the trip are the Internet (71%) and friends/family (70%).
- Guidebooks are used by 37% overall but are used far more by slightly older (over 26) travellers, more experienced travellers and those calling themselves ‘backpackers’.
- Less experienced travellers rely more heavily on travel agents for information.
- The very wide range of information sources drawn upon suggests that pre-trip planning is highly detailed, even for more experienced travellers.

How do they book their travel, accommodation and activities?
- The majority of young people and students use travel agents to book their travel (65%), and the overall split between mainstream travel agents and specialist travel agents is more or less equal. However, those calling themselves ‘backpackers’ are significantly more likely to use specialist travel agencies (42%) and those calling themselves ‘tourists’ more likely to use mainstream travel agents (51%). As they get older, they tend to prefer making their own travel arrangements rather than using travel agencies.
- Few travellers book any accommodation in advance of their departure.
- The average travel booking lead-time is six weeks, rising to two months for trips over four months in duration. This lead-time is significantly longer for long haul and non-Western destinations.
- 56% of young people obtain some kind of student discount on their trip, 30% obtain an under 26 discount, 25% obtain discounts on rail and bus and 17% obtain accommodation discounts.

‘On the road’
The bulk of the report deals with the trip itself – where do youth and student travellers go, how do they travel, where do they stay, how much do they spend and what do they do when they arrive?

Where do they go?
- Young people have visited many different world regions in the past, with the main destination regions visited on their last big trip being Europe (56%) and North America (16%).
- The destinations that are most popular with those calling themselves ‘backpackers’ are Southeast Asia, Australasia and South America. North America is the most popular destination with those calling themselves ‘travellers’.
- Females are more likely to be travelling in Western Europe, the Middle East and Central/Southern Africa, while males are more likely to be travelling in Eastern Europe, North, Central and South America, China/Japan and Southeast Asia.
- A ‘travel career’ appears to be forming among the young people and students surveyed, as the least experienced travellers are visiting the ‘westernised’ areas of Europe and North America but more experienced travellers tend to visit more ‘challenging’ destinations, including South America, China/Japan and the Indian sub-continent.
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⇒ How do they reach their destinations?
- By far the main mode of transport to the destination is air travel (82%; higher for long haul destinations) followed by rail travel (30%).
- Those calling themselves ‘tourists’ are more likely to use tour buses to reach their destination, while ‘backpackers’ tend to use the rail and coach networks more than ‘travellers’ and ‘tourists’.
- ‘Backpackers’ are more likely to use air transport, trains, coach or hitch hike within their destination, while ‘travellers’ and ‘tourists’ are more likely to rent a car, and ‘tourists’ again tend to use tour buses more.
- Males are significantly more likely to hitch hike than females.

⇒ Where do they stay?
- The most popular forms of accommodation are visiting friends and relatives (41%) and backpacker hostels (32%).
- Backpacker hostels are particularly used in Australasia and Southeast Asia, which reflects the distribution of more institutionalised, dedicated backpacker facilities.

⇒ How long do they stay?
- The average length of the last main trip is considerable – 63 days on average. Those calling themselves ‘backpackers’ travelled for longer (an average of 74 days).
- The longest duration trips are taken in Australasia (128 days), North America (90 days) and the Indian sub-continent (84 days) and the shortest duration trips are taken in Europe (34 days).

⇒ How much do they spend?
- Within the destinations the average spend is relatively low at under US$20 per day. However, the total average spend in the destination is high at US$1,200 per trip (and, including travel costs, rises to almost US$1,900 per trip).
- The average total spend is highest in Australasia, South America and Southeast Asia.
- Those calling themselves ‘backpackers’ spend the most overall on their trips (an average total spend of US$2,200), which is explained by their tendency to travel for longer.
- There is a lot of importance placed upon saving up as well as working during the trip for that ‘once in a lifetime’ experience, as their budgets are often very close to their annual income.

⇒ What do they do on their travels?
- The most popular activities are visiting historic sites and monuments (77%), walking and trekking (76%) and more leisurely pursuits such as sitting in cafes/restaurants (72%) and shopping (72%).
- Fewer are undertaking academic study or learning a language during their trip (28%), but this still amounts to a significant number of participants.
- Activities are remarkably similar for ‘backpackers’, ‘travellers’ and ‘tourists’, indicating that although the travel styles may be perceived as very different, the activities undertaken in the destination are often very similar.
- ‘Backpackers’ do more of everything, which fits with their experience-seeking motivations. More experienced respondents also did more activities.
- There appears to be intense periods of activity during the trip, which is interspersed with periods of relaxation and ‘hanging out’.
- Walking/trekking and cultural events are most popular among female respondents, while male respondents’ activities tend to be more focused on sports and adrenaline experiences.

⇒ What information sources do they use during their trip?
- The main information sources used during the trip are guidebooks (46%), and Lonely Planet is the most frequently used guidebook, particularly among those calling themselves ‘backpackers’, underlining its’ status as the ‘Backpackers Bible’.
- Email and the Internet are used frequently for keeping in touch (by 68%).
Reflecting on the trip
The return home is a time to reflect on the experience of the journey and what benefits it has produced.

⇒ What do they gain from their travels?
• The main benefits that are gained from travel are a thirst for more travel (which supports the ‘travel career’ idea above), and also cultural benefits such as an increased understanding and appreciation of other cultures.
• Those who undertake more activities during their trip gain the greatest number of different benefits from their travels.

And in conclusion...

The two reports conclude that youth and student travellers are experience seekers who travel for long periods in search of culture, adventure and relaxation. They already have a great deal of travel experience and often make repeat visits. Furthermore, their travels are sophisticated, carefully planned and have a lasting impact on their personal and professional lives. This is evident as they return from their trips having gained many personal benefits but most of all, a thirst for more travel, which increases the long term potential of this market. Importantly, the total spend on their longer trips is higher than for most other markets, even if the daily average spend tends to be lower. The potential is increased even further with the evidence that many young people and students are building a ‘travel career’. Driven by this thirst for more travel, they expand their horizons by choosing increasingly challenging destinations as they become more experienced travellers, spending more and planning more carefully as they get older. This development trajectory indicates the need to develop new products to meet the demands of this market.

However, the youth and student market should not be viewed as a homogenous group in terms of their style of travel and their motivations. The reports differentiate many characteristics of youth and student travellers according to how they define their style of travel, as well as other factors. This increases the need to develop products oriented specifically to those who prefer a particular travel style.

Perhaps the most important conclusion is that this is a growth market, in that the majority of youth travellers are presently or have previously been students. The continuing rapid growth in student numbers around the globe is a very optimistic prospect. This is because the international student population consists of avid travellers who are prepared to save up to ensure that their trip meets the ‘once in a lifetime’ requirement, even if the trip does not end up being a one-off (which – judging by the high number of repeat visits – it is clearly not).

A full version of the report is also available, entitled ‘Today’s Youth Travellers: Tomorrow’s Global Nomads’. This version contains more detailed analyses of the survey findings. Details of how to obtain a copy can be found at the end of this document.
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Introduction

Youth and student travel is an increasingly important segment of the global travel market, with young people tending to travel more frequently and for longer periods than their older counterparts. The youth and student travel industry has also expanded rapidly in recent decades, with a growing number of specialist travel professionals catering to an expanding market. It also has major growth potential as the international student population expands, their incomes rise and new markets are opened up in newly industrialising economies and in Central and Eastern Europe. Around one fifth of all tourism journeys in the world are made by young people aged 15-25, and this is forecast to rise to 25% by 2005. The young travellers of today also provide an important basis for the travel decisions of future generations.

Although youth and student travel has been an important cornerstone of the international travel market for over 50 years, it is only the recent explosive growth of the international student population that has thrust this market into the spotlight. The importance of youth tourism as a field of interest for policymakers and researchers was first emphasised internationally in November 1991 with the first World Tourism Organisation (WTO) conference on youth tourism in Delhi.

Since then, interest in the market has increased rapidly. The youth and student travel industry, confederated in global bodies such as the International Student Travel Confederation (ISTC) and the Federation of International Youth Travel Organisations (FIYTO), caters for the needs of a large proportion of the 140 million young people who travel internationally each year.

However, youth tourism is more than an industry; it also has important educational and cultural functions. ISTC continues to support the wider benefits of travel for young people, working with UNESCO to promote international understanding through travel, and to ensure travel is accessible to all young people. ISTC is also the umbrella confederation for the International Association for Educational Work Exchange Programmes (IAEWEP) – whose members specialise in arranging work abroad programmes for more than 50,000 young people annually.

Other international bodies such as the European Union also see youth tourism as a vital sector. The European Commission’s YOUTH Programme is active in stimulating youth and student travel through cultural and educational programmes such as SOCRATES and LEONARDO, which facilitate the mobility of more than 100,000 young people and students every year.

Despite its growing scope and importance, youth and student travel has not been studied in great detail in the past, arguably due to a combination of measurement problems and a misconception that youth and student travel markets are low value.

This document summarises the findings of a major transnational survey on independent youth and student travel, launched in 2002 by ISTC and the Association of Leisure and Tourism Education (ATLAS) – a unique research partnership dedicated to understanding the youth and student travel phenomenon. The survey was designed specifically to analyse the global independent youth and student travel market. It is unique in that it is the first study to cover all aspects of the youth and student travel experience, or the ‘whole journey’; from trip planning and booking through to the trip itself and the reflections following the trip. The methodology is also unique in that it is based on international primary research with young people themselves, rather than analyses of secondary data (as most previous studies have been). It is also the first document to draw together existing academic and market-based studies on youth and student travel into a bibliography.

The aim of the survey was to try and gather consistent and detailed transnational information on the global youth and student independent traveller market. For the first time, the survey combined information on the social and cultural aspects of young travellers (their backgrounds, motivations and experiences) with data on the way in which the travellers purchased their travel and gathered...
information, as well as their destinations and previous travel experience. It focuses on different dimensions of the last major trip made by 2,300 youth and student respondents, who were contacted via ISTC’s global network of student travel organisations.

**What’s inside this report?**

This summary report reveals the motivations, activities, destinations, information use, travel purchase and expenditure of youth and student travellers going abroad. It is structured around key questions relating to young travellers, including their similarities and differences, destinations and motivations to travel, information-gathering, booking, spending and activities, and the kinds of benefits they gain from their travel experiences. These questions were designed to reflect the ‘journey’ as a whole. The *decision to travel* is the focus of the first section, moving on to *planning the trip*, the trip itself (or being ‘on the road’) and finally *reflections on the trip*, which asks what kinds of benefits were gained from travelling.

**The report as a ‘journey’**

**The decision to travel**
- Who are the youth and student travellers?
- Why are young people and students travelling?
- How much travel experience do they already have?

**Planning the trip**
- What information sources do they use for planning their trip?
- How do they book their travel, accommodation and activities?

‘On the road’
- Where do they go?
- How do they reach their destinations and how do they travel around when they arrive?
- Where do they stay?
- How long do they stay?
- How much do they spend?
- What do they do on their travels?
- What information sources do they use during their trip?

**Reflecting on the trip**
- What do they gain from their travels?

This summary report gives an overview of the findings. The full version report, entitled ‘Today’s Youth Travellers: Tomorrow’s Global Nomads’ is also available from the ISTC and ATLAS websites, or in hard copy from ISTC (details can be found at the end of this report).
Previous youth and student travel studies

A bibliography of previous studies can be found at the end of this report. However, in spite of the growing body of youth and student travel literature, research remains fragmented and it is difficult to gain an overview of the global market. The current report attempts to address some of the weaknesses in previous research by providing a comprehensive picture of youth travel derived from original research conducted globally with the youth and student travellers themselves.

A review of the literature reveals that research on youth and student travel has shifted away from sociological and anthropological studies of ‘wandering’ and ‘drifting’ youth in the 1970s towards youth and student travel as a mass global phenomenon, which is an increasingly attractive market. Market-based studies specifically dedicated to youth and student travel have begun to emerge, which have underlined not only the economic importance of the market but also the potential benefits of targeting youth and student travellers. This includes their tendency to travel more widely and stay longer within a given country, resulting in a higher overall spend and a spread of the spending across more local destinations, in addition to lower vulnerability to the external shocks affecting other tourist markets.

There has also been an increased academic interest in some specific aspects of the youth and student travel market. This has been accompanied by an increasing segmentation of the overall youth travel market into areas such as backpacking and other sub-niche youth tourism based on sub- and countercultures, including adventure tourism and tourism based on music scenes, although there is still a general lack of transnationality and cross-cultural comparison in most of the available research. However, potential has been recognised for building a culture of global peace and understanding through the vehicle of youth tourism, which has given added value to the international youth and student travel market.

Why the survey was conducted

The survey attempted to understand international youth and student travel more clearly, as well as test some of the widely held notions about this market. Previous studies have tended to be limited geographically or have only dealt with basic socio-demographic data. This is because most studies have been based on re-analyses of national tourism surveys. The ISTC/ATLAS study aimed to overcome these limitations by asking young people and students directly about their travel. The main aim was to investigate different dimensions and characteristics of international youth and student travel, from the point of view of those participating in it: young people and students themselves.

How the survey was conducted

The data used in the survey was collected in 2002, using mailing lists provided by travel company members of ISTC in eight countries: Canada, the Czech Republic, Hong Kong, Mexico, Slovenia, South Africa, Sweden and the UK. The email response questionnaire was designed in consultation with international experts from the Backpacker Research Group of ATLAS, and many of the questions were based on questions tried and tested in other tourism surveys. The survey generated over 2300 responses. Figure 1 shows the age range of the respondents.
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Figure 1: Respondents by age

One remarkable aspect of the survey was that there were more female respondents (67%) than male respondents (33%). This is contrary to the response usually gathered from email-administered surveys, which tend to have a majority of males. It is also different from the image of backpackers, for example, who are usually assumed to be predominantly male. However, observations in the field and other studies have indicated an increasing proportion of female travellers. Male respondents tended to be slightly older on average than female respondents.

1. The decision to travel

Who are the youth and student travellers?

Occupation

Not surprisingly, the majority of respondents are students (70%), whose dominance is also reflected in the age profile of the respondents. Over 60% of respondents are aged between 20 and 25, with only 5% of the sample aged over 30. Of the students in the sample, 89% are under 26, which is also unsurprising. However, 61% of professionals are also under 26. 70% of unemployed respondents are aged under 26 years.

Education

The respondents have a relatively high level of education, with 34% having already gained a higher education degree and a further 25% still studying for one.

Income

The stereotype of poor youth and student travellers seems to be confirmed by half the respondents having an income of US$5,000 or less. However, the relatively large travel budgets (see below) indicate that most are able to save up for a major trip, or can supplement their income by working abroad. Earning power also increases with age, as most of those earning less than US$5,000 are under 26 years.

Backpacker, traveller or tourist?

In recent years there has been a tendency to see many young travellers as ‘backpackers’ – a popular label which is reflected in the growing number of backpacker hostels as well as academic articles on backpacker travel. When we asked people to classify themselves as either ‘backpackers’, ‘travellers’ or ‘tourists’, however, it was clear that many people reject the ‘backpacker’ tag, even if they are travelling with a backpack and staying in backpacker hostels.

Over half of the sample identified with the label ‘traveller’, compared with almost a third who call themselves ‘backpackers’. Less than 20% consider themselves ‘tourists’. Older respondents with more travel experience in particular reject the ‘tourist’ designation, more often calling themselves ‘backpackers’ or ‘travellers’. Younger respondents are significantly more likely to call themselves ‘tourists’ or ‘backpackers’. This may suggest attempts by older and more experienced travellers to distance themselves from their younger counterparts. Analysis of travel styles by destination (see
the section ‘on the road’ below) indicates that ‘backpackers’ tend to be found where the development of the backpacker industry is strongest (for example, within enclaves of dedicated backpacker infrastructure in Southeast Asia, the Indian sub-continent and Australasia).

**Why are young people and students travelling?**

Young people usually travel looking for a mixture of exploration (ranked first overall, 83%), excitement (ranked second, 74%) and increasing knowledge (ranked third, 69%), although relaxation-based motivations are also important. Some respondents are highly oriented towards experiencing as much as possible during their trip. This seems to be particularly true for ‘backpackers’, whereas ‘tourists’ are more likely to be in search of relaxation. The relatively high proportion of ‘travellers’ staying with friends and relatives matches their strong motivations for visiting friends and relatives and developing close friendships compared to other groups. Respondents under the age of 26 were significantly more likely to be seeking friendship with other travellers and were also more motivated by excitement and the opportunity to challenge their abilities. Older travellers were less likely to be looking for ‘exciting’ activities, tending to seek out more ‘challenging’ destinations instead (see section 2: Planning the trip).

A relatively small proportion of respondents travel for more altruistic motives, such as contributing something to the places they visit. This indicates that most people are looking for knowledge of other cultures without getting ‘actively’ involved in the local communities. People rarely had one overriding motive, with most trips comprising two or more important motivations, such as relaxation combined with culture. This is perhaps not surprising given the relatively long trips taken. Different parts of the trip may well be dominated by different motivations and activities.

The most interesting relationship between motivation and destination was that those visiting Thailand scored ‘associating with other travellers’ considerably higher than for those visiting any other destination. This may be due to the more obvious presence of well-known traveller ‘enclaves’ and a more established infrastructure for ‘independent’ travel in destinations such as Thailand and Malaysia. These enclaves have led to a greater concentration of travellers in close proximity and hence there are more like-minded travellers to associate with and with whom to exchange information and stories.

**Figure 2: Main motivation for last big trip (scale 1 = of no importance, 5 = very important)**
How much travel experience do they already have?

The respondents are already experienced travellers (Figure 3), having made an average of six major trips outside their region of residence over their entire travel career. Not surprisingly, however, the number of trips increases with age, with 5.9 trips for those under 26 and 8.0 for those over 26, underlining the relatively higher level of travel experience of older travellers and supporting the ‘thirst for more travel’ ethic that comes from travelling when younger (see Box 1 and Section 4 below).

Individual trips tend to include at least two different countries, and for more experienced travellers, the number of countries visited per trip increases. The number of countries was also higher for those under 26 than those over 26, suggesting a slightly wider geographical range of mobility of younger travellers. What is clear for both age groups, however, is that those who travel for longer are visiting a greater number of countries during their trip.

Figure 3: Previous travel experience by travel style

2. Planning the trip

What information sources do they use for planning their trip?

Youth and student travellers tend to be information intensive, consulting a wide range of information sources before departure. The Internet is the main form of pre-trip information gathering (71%), followed by family and friends (70%) (Figure 4). The level of Internet use is likely to be higher than average among our sample given the survey method. However, a recent survey of backpackers in Australia indicated that 44% had used the Internet to gather information prior to arrival (TNT/Uni Travel, 2003).

Guidebooks tend to be used more by experienced travellers. Of those who had taken three trips or less, only 30% used guidebooks, compared with 50% of those who had taken ten trips or more (and this difference became even more marked during the trip, when 60% of the most experienced travellers had a guidebook with them).

Guidebooks are also consulted by more than 60% of ‘backpackers’ prior to departure, compared with less than 20% of ‘tourists’. More experienced travellers are more likely to use guidebooks for planning their trip, because they tend to be planning longer visits to more ‘difficult’ destinations which require higher levels of planning. Respondents using travel agents and the Internet as an information source when planning their trip are significantly less experienced travellers.
Respondents consulted an average of three different information sources prior to their trip. Experienced travellers consulted significantly more sources pre-departure, and ‘backpackers’ were also likely to use more sources than other respondents, usually because of their use of personal recommendation from fellow travellers. Interestingly, over 26ers consulted more information sources than younger travellers, which indicates that increasing travel experience and age does not necessarily lead to less detailed (i.e. more spontaneous) trip planning (Figure 5).

The picture that emerges is of careful planning of major trips by young travellers, who also tend to be relatively experienced and knowledgeable about the places they visit. However, relatively little is known about the more complex process of actual decision-making and what inspires young people to go travelling. This area could be investigated in future research.
How do they book their travel, accommodation and activities?

Most respondents book their travel with travel agents (65% for air travel), although this is likely to have been affected by the sourcing of respondents from travel agency lists. Only 10% use the Internet to book. Those booking with specialist youth and student travel agents preferred to call themselves ‘backpackers’ (42%). ‘Tourists’ are more likely to use mainstream travel agents (51%). Very few respondents booked accommodation in advance, and this was particularly marked for ‘backpackers’. It seems most people are happy to arrive in the destination and organise things themselves. In particular, more experienced travellers are less likely to book accommodation in advance.

Air travel booking also varied depending on the length of the trip. Mainstream travel agents were more likely to be used for short trips whereas longer trips tended to be booked with specialist travel agents. Internet is still being used mainly for booking air travel for short trips, which suggests that young people are not yet willing to trust the Internet for major ticket purchases and are more likely to seek personal advice from travel specialists. However, the proportion of Internet booking may have risen since the data was collected in 2002, given the increasing opportunities for online travel booking.

The average flight booking lead time is six weeks, although it is significantly longer for long haul and non-Western destinations; 23 weeks ahead for Swedish respondents going to Chile, for example. Exceptions include package destinations such as the Dominican Republic, which have a much shorter travel booking lead-time. Travel booking lead time rose for longer trips, reaching almost two months for trips of four to six months’ duration. The average accommodation booking lead-time is shorter (an average of 4.5 weeks ahead), indicating that flights are booked first.

Over half the respondents obtained some kind of student discount on their trip, with 30% obtaining under 26 discounts, 25% obtaining rail and bus discounts and 17% obtaining accommodation discounts (Figure 6). Those under 26 had more discounts than those over 26 on rail/bus travel and using under 26 or student discount entitlements, which is not surprising as many discount schemes are geared to younger travellers and students. However, those over 26 had more discounts on air travel and using membership and general discount cards, which could include frequent flyer schemes and this would fit with the over 26 group having more travel experience overall.

Figure 6: Discounts obtained by under 26 and over 26 year olds
3. ‘On the road’

Where do they go?

The survey respondents were asked to indicate the destinations they visited during their entire travel career, as well as the destinations they had visited during their last major trip.

Regions visited over whole ‘travel career’

Over the course of their entire ‘travel career’ to date (see Box 1 below), the respondents had visited many world regions, with over half having visited Northern and Southern Europe and over 40% having visited North America and Eastern Europe. Less developed regions had also been visited, with 18% having visited Central America, 16% having visited Southeast Asia and 13% having visited Australasia (Figure 7).

Destinations on the last big trip

The main destination regions on the last main trip were Northern Europe (30%), Southern Europe (16%), North America (16%), and Eastern Europe (8%), with a considerable number visiting Southeast Asia and Australasia (Figure 7).

Figure 7: Destinations visited over entire ‘travel career’ and destinations visited on last big trip

Male respondents tended to visit Eastern Europe, North America, Central America, South America, China/Japan, Southeast Asia and Australasia more on their last main trip, while
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Northern and Southern Europe, the Middle East, North, Central and Southern Africa and the Indian sub-continent had a higher proportion of female visitors. This pattern is not obviously related to perceptions or concerns over the relative safety of female travellers ‘on the road’.

Clearly, there are high numbers of repeat visits made by young people and students (Figure 8). North America was visited by a greater proportion of respondents on repeat visits than first time visits (88%) and the same pattern was true of Europe (over 70% repeat visits for all regions of Europe). However, other regions had a higher proportion of first time visits, particularly the Indian sub-continent (60% first time visitors) South America, Southeast Asia and Australasia (all with 51% first time visitors). These are relatively long haul destinations from the major source markets and are therefore more likely to be seen as ‘once in a lifetime’ destinations.

Figure 8: First time and repeat visits to different world regions

Box 1 - Are youth and student travellers building a travel ‘career’?

As travel experience increases, so people tend to travel further a field. The average visitor to Northern Europe had only made five major trips previously, compared with eight trips for visitors to Australia and over ten trips for those visiting India. This gives some indirect support for the idea of a travel career (Pearce, 1993) among the respondents, with Europeans for example tending to travel within Europe initially, and then to visit Australasia for their first big inter-continental trip before striking out for less developed and arguably more ‘difficult’ and ‘challenging’ Asian, African and Latin American destinations.

Additionally, even though most survey respondents might be regarded as relatively young travellers, many of them indicated they were on repeat visits to a foreign country (see Figure 8 above), implying that a self image as an ‘avid’ traveller can have already set in at a young age.

The ‘travel career’ idea is also supported by the fact that as travellers get older, they have built up more travel experience (see section 1 above), and that the main benefit derived by young people from their travel is a thirst for more travel (see section 4 below).

Youth and student travel providers have also been developing new products as the market has matured and more experienced travellers have entered new phases of their travel careers.
Relatively ‘mature’ destinations in North America and Europe have the lowest proportions of ‘backpackers’, while relatively ‘new’ destinations such as Vietnam have the highest. This may be an indication of the ‘pioneer’ function of young backpackers, who arguably blaze a trail for the ‘travellers’ or ‘tourists’ who follow. ‘Backpackers’ also tended to visit more countries during their trips than ‘travellers’ or ‘tourists’. The average ‘backpacker’ visited 2.4 countries during their last major trip, compared with 1.8 for ‘travellers’ and 1.7 for ‘tourists’.

The destination of the trips taken was naturally strongly influenced by the country of residence, as people obviously travel within their own world region more frequently. Europe had been visited by over 50% of respondents, North America by almost 50% and other world regions by less than 20%. This corresponds to some extent to the distribution of the survey countries but also reflected the general distribution of international tourism, which is largely concentrated in the industrialised ‘North’.

**How do they reach their destinations? What transport do they use when they arrive?**

Overall the main modes of transport to the destination are air travel (82%) and train travel (30%). Those calling themselves ‘tourists’ are more likely to use tour buses to reach their destination, while ‘backpackers’ tend to use the rail and coach networks more than ‘travellers’ and ‘tourists’.

The main transport modes within destinations are walking (60%), tram, metro or local bus (54%) and local train (42%). ‘Backpackers’ are more likely to use air transport, trains, coach or hitch hike within their destination, while ‘travellers’ and ‘tourists’ are more likely to rent a car, and ‘tourists’ again tend to use tour buses more. Males are significantly more likely to hitch hike than females.

**Where do they stay?**

The homes of friends and relatives were the most popular form of accommodation (41%), followed by backpacker hostels, hotels and youth/independent hostels (Figure 9). Over 26ers were more likely to stay in hotels than under 26ers, implying that people are prepared to spend more on their accommodation as they get older and require more comfort.

**Figure 9: Accommodation used on last big trip**

The fact that young travellers seek out budget accommodation or stay with friends and relatives means that a higher proportion of their expenditure is likely to be made with local businesses rather than national or global chains. This may have the effect of increasing their local economic impact in relation to other types of visitors.

Respondents who used backpacker and youth hostels were more motivated by excitement, challenge and a desire to meet other travellers. Those who stayed in hotels, however, were seeking comfort and relaxation, while those staying with friends and relatives had more social and friendship-based motives for their travel.
How long do they stay?

The last main trip taken averaged over 60 days (Figure 10). The longest trips are made to Australasia (an average of 128 days), North America (90 days) and the Indian sub-continent (84 days), while the regions with the shortest trip durations are Eastern Europe (29 days), North Africa (36 days), Southern Europe (39 days) and Central/Southern Africa (47 days).

For single destination trips, destinations where respondents stayed the longest on average included Australia (107 days), Canada (90 days) and the USA (87 days), while trips to France (39 days) and Greece (only 20 days) were among the shortest.

Looking at origin countries, the longest trips were made by respondents from Mexico (86 days), South Africa (82 days) and Canada (73 days), while trips by Slovenians were only 38 days on average.

Figure 10: Trip length in days

How much do they spend?

Average daily spend was relatively low, with over half of the respondents estimating their spend to be less than US$20 a day (Figure 11). However, the average total spend in the destination was US$1,200 (and almost US$1,900 including travel), which is more than most ‘high-spending’ tourists manage during their shorter stay in the destination.

The total spend including travel to the destination is almost US$2,200 for ‘backpackers’; higher than either ‘travellers’ (US$1,800) or ‘tourists’ (US$1,470). Expenditure is also clearly influenced by income, with those on incomes over US$20,000 a year spending almost twice as much on average as those earning less than US$5,000. ‘Travellers’ and those with a longer average trip length were significantly more likely to be earning money abroad.

Figure 11: Average daily spend by traveller type
The idea that hardened ‘travellers’ tend to be more careful with their money is not supported by the survey. In fact those ‘travellers’ with more travel experience spend more per day than relatively inexperienced ‘travellers’ (Figure 12). This is probably because they are slightly older and have higher incomes, and may support the idea that people who travel to countries as relatively poor backpackers return later as wealthier travellers.

**Box 2 - Exploding the myth of young people and students as budget travellers**

The total spend per major trip is almost US$1,900, of which about $1,200 is spent in the destination and almost $700 on travel. Because the length of stay is longer and most spending is made with local businesses, the local economic impact can be greater than for other types of tourists. This is a major reason why many governments are now developing specific strategies to attract backpackers and other young travellers.

**Box 3 - Developments in how young people and students are financing their travel**

The importance of saving for a major trip is clear, as the respondents’ average expenditure approached their usual annual income in many cases. Those calling themselves ‘travellers’ and those with a longer trip length were significantly more likely to be earning money during their trip.

Chadee and Cutler (1996) found that 65% of their student respondents would be using past savings to finance their trips, while 9% anticipated taking a bank loan. This implies that students plan and save for their trips well in advance and often undertake employment for a short period leading up to the trip. They also noted that only 8% planned to borrow from relatives and that this did not fit with assumptions that students can only travel thanks to parental financial support.
What do they do on their travels?

The most popular activities are visiting historical sites and monuments and walking/trekking (both undertaken by over 70% of respondents). However, more leisure-based activities including sitting in cafes and restaurants and shopping are also very popular.

Young travellers undertook a very wide range of activities during their trip. ‘Backpackers’ in particular tend to undertake more different activities than other travellers (even when controlling for length of stay), perhaps pointing to backpacker trips as ‘once in a lifetime’ experiences that require every available experience to be sampled. However, in spite of the argument that backpackers are keen to distinguish themselves from other types of tourists, their activities tend to be fairly similar to tourists in general.

Women are more likely to go walking or trekking, participate in cultural events, sit in cafes and restaurants and shop than men, who were more likely to either watch sport or participate in sport/adrenaline activities, reflecting traditional differences between leisure preferences of males and females. However, women are also more likely to earn money during their trip than men. Almost all of those earning money and undertaking academic study were under 26, supporting the idea that younger travellers often take paid work while travelling to fund their trip as they go, or travel as part of academic study programmes.

Box 4 - Staying in touch: Communication channels on the trip

How are youth and student travellers keeping in contact with their friends and relatives while ‘on the road’? Overall, email and the Internet were the main communication channels used during the trip (with 68% of respondents having used them at some point), fitting well with the increasingly ‘connected’ lifestyle of young people in terms of their use of email and chat programmes for keeping in touch. Over 26ers were significantly more likely to use a phone booth with a locally purchased phone card than were younger travellers.

Significant differences can also be noted, depending on the destination visited. International phone calls more popular for communication in non-European destinations, and letters and postcards were less popular in English-speaking destinations and Northern Europe (the Netherlands, Germany, and Scandinavia).

Figure 13: Communication methods on trip (as ranked first by respondents)

Internet and email communication was highest in longer haul destinations such as India, Thailand, Mexico and Japan (with the exception of China, where Internet and email use was much lower). It was also relatively high in Sweden, the Netherlands, South Africa and English-speaking countries, including the USA, Australia, Canada and the UK, while the destinations with the lowest levels of communication by Internet/email were Turkey, Croatia and Austria.
What information sources do they use during their trip?

On the road, the most important information source is a guidebook (46%). The most experienced travellers are more likely to have a guidebook with them during their trip (60%), demonstrating that increased experience does not automatically lead to lower information requirements. More experienced travellers may need more information because the destinations they visit are often located further off ‘the beaten track’. Over 26 year-olds were also significantly more likely to use guidebooks during their trip than younger travellers, once again implying a higher requirement for orientation and knowledge regarding their destinations.

Almost 70% of ‘backpackers’ use guidebooks while on the road, compared with only a third of ‘tourists’, suggesting that backpackers are far more likely to buy a guidebook prior to travel and then use the same guidebook as ‘their bible’ while travelling.

4. Reflecting on the trip

What do they gain from their travels?

The main benefit gained from travel is a thirst for more travel (Figure 8). Once young people start travelling, they find it difficult to stop, underlining the importance of attracting backpackers early in their ‘travel careers’, as they are likely to remain avid travellers (see Box 1). Those who undertook more activities also felt they had gained more benefits from their travel. Active, varied trips therefore seem to be perceived as the most beneficial.

Figure 14: Benefits gained from travel

Culture appears to play an important role in the satisfaction that people get from travelling, which is not surprising, given that ‘exploring other cultures’ is the most important motivation. Those with more travel experience in particular say they gained more appreciation of other cultures through their travel and were more likely to be motivated by interaction with local people. The fact that visits to historical sites and monuments are the most frequent activities underlines the importance of culture in the travel experience, but tends to indicate a fairly traditional view of cultural experiences.

Finally, ‘increased cultural tolerance’ and ‘an interest in learning about other cultures’ are the only benefits from travelling not significantly different according to the region visited. This suggests that cultural impacts on youth and student visitors are a relatively constant effect of travel, irrespective of the region visited.
Can youth travel contribute to peace and understanding?

The current survey shows that youth and student travel is propelled by a desire for contact with other cultures, building friendships and appreciating the value of the everyday life of other cultures. This indicates that youth travel has the potential to contribute to building international peace and understanding, a suggestion that seems to be supported by the fact that the young people and students surveyed are most reflective about their experiences in relatively poor and unstable regions of the world.

However, relatively little specific empirical research has been conducted in this area. As a response to this gap and building on the findings of the independent traveller survey, ISTC and ATLAS are currently undertaking a major study of the effect of cultural tourism experiences on the attitudes and values of young travellers towards other cultures. This research examines the extent to which the travel experience itself modifies their cultural perceptions and changes their attitudes, not only to the culture they visit but also to wider questions of cultural diversity, tolerance and xenophobia. A report of the results of this study will be available in 2004.

Conclusions

The picture that emerges from this first transnational survey of youth and student travellers is of experience-thirsty people, seeking contact with other cultures, local people and other travellers. They take long duration trips, which they pack with a wide range of activities, spending a great deal more money over their whole trip than many older tourists. Previous travel experience is a major factor in determining travel styles and destinations. Their trips tend to be sophisticated, carefully planned and have a lasting impact on their personal and professional lives. It is also clear that those young people who invest the most time and energy into their experiences by undertaking more activities gain the most from them.

Although young travellers have much in common, such as generally high levels of education, this group is clearly heterogeneous, with different motivations, attitudes, activities and understandings of their own styles of travel. Differences in how young people define their style of travel (‘backpacker’, ‘traveller’ or ‘tourist’) give insights into the different motivations, destinations, accommodation and activities chosen, among many other characteristics that differ according to travel style. This illustrates just how differentiated this market really is.

The market is also changing rapidly, with increasing participation by women, increasing contact with home via the Internet and the growth of specific backpacker and youth tourism products. Such products are increasingly to be found in ‘enclaves’ in major youth travel destinations such as the Khao San Road in Bangkok or King’s Cross in Sydney. Such ‘enclaves’ are not just functional intersections or resting places for independent travellers, but have also become an attraction themselves, as young people and students have begun to travel also for experiences in the enclaves and for social interaction motives. Those who stated that ‘building close friendships’ and ‘associating with other travellers’ was an important motivation for their trip were much more likely to use fellow travellers as an information source, underlining the high levels of social and communal activity.

The rapid growth in student numbers around the globe highlights the optimistic prospects for youth and student travel. This is evident because the international student population consists of avid travellers who are prepared to save up to ensure their trip meets the ‘once in a lifetime’ requirement, even if the trip does not end up being a one-off (which – judging by the high number of repeat visits – it is clearly not).

The long term potential is also clear. Young people often develop a thirst for more travel during their major trips, which may stimulate them to travel more widely and more frequently in the future. Older, more experienced travellers tend to visit more distant regions or more ‘adventurous’ destinations, spending more money as their age and experience increases. This indicates that
many young people and students are building a ‘travel career’. Driven by this thirst for more travel, they expand their horizons by choosing increasingly challenging destinations, as they become more experienced travellers. This development trajectory indicates the need to develop new products to meet the demands of this market in the future.

Additionally, youth and student travel has the potential to contribute to international peace and understanding, as evidenced by the strong propensity of young people to seek experience and appreciation of other cultures and fellow travellers.

This report challenges much of the established wisdom of youth and student travel, as well as detailing new aspects of this growing international market. Young travellers are experienced, sophisticated consumers and their thirst for travel indicates their awareness of the lasting impact it can have on their future lives.

*Where can I get a copy of the full report: ‘Today’s Youth Travellers, Tomorrow’s Global Nomads’?*

This summary has given a flavour of the research findings. For those interested in delving a bit deeper into the world of youth and student travel, the full version of ‘Today’s Youth Travellers, Tomorrow’s Global Nomads?’ is also available for download at both the ISTC and ATLAS websites, and available in hard copy from ISTC. The full version is structured in more detail around key questions about youth and student travellers, including their profile, destinations and motivations to travel, information gathering, booking, spending and activity behaviour, and the kinds of benefits they gain from their travel experiences. The two versions have been designed so that those who wish to get a more succinct flavour of the findings can consult the summary version, while those who wish to gain a deeper perspective can consult the full version. The two reports together therefore provide an authoritative mix of perspectives on youth and student travellers which should be of interest to the youth and student travel industry as well as university researchers.

*Where can I get more information?*

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New Horizons in Independent Youth and Student Travel


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They are the editors of forthcoming volume ‘*The Global Nomad: Backpacker Travel in Theory and Practice*’ (2004, Clevedon: Channel View Publications) and are currently continuing their collaboration with ISTC and ATLAS on a major study on the effect of cultural tourism experiences on the attitudes and values of young travellers towards other cultures.

Acknowledgements

The authors would like to thank Aafke van Sprundel, Joanne Kearins and David Jones of ISTC, and Helen Cunningham, formerly of ISTC, for their invaluable collaboration on the research featured in this report, as well as on the report itself. Special thanks are also due to the various members of the ATLAS Backpacker Research Group (BRG), who fed into the research design phase with their helpful comments and insights, and to Leontine Onderwater, for her support of the activities of the BRG.