



# NewHorizons

Information and guidelines  
for survey distributors



A PROJECT OF



WYSE TRAVEL  
CONFEDERATION

# THANK YOU TO OUR NEW HORIZONS SPONSORS



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# INFORMATION

## How we know what we know about youth and student travel

The youth traveller stays longer and spends more, but how do we know this? We have spent fifteen years of studying travellers aged 35 and younger. The New Horizons study has given us valuable insights into the world of young travellers!

Here we outline the reasons for this important survey and guidelines to help you share it with the young travellers you work with.

Thank you! Your commitment to the New Horizons project is very much appreciated. If you have questions about anything you read here, let us know how we can help you.

## 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 young travellers and the youth, student and educational travel industry that serves them.

WYSE Travel Confederation is committed to understanding the ever-changing characteristics, motivations, and needs of young travellers. WYSE gathers, analyses and shares important market intelligence with members, academics and government decision-makers and works with its partners around the globe to:

- Identify the unique needs and trends of today's young travellers
- Promote the personal, social, economic and cultural benefits of travel and international education
- Support the development of student and youth travel specialists
- Develop trading, networking and knowledge-sharing platforms for youth and student specialists.

## **New Horizons: The roots of the WYSE research programme**

Today surveys, summaries, and sweeping statements about Millennials and other young travellers abound, but this was not always so. In fact, amidst a growing body of research on the youth travel market there is a little-known, but essential tool that has helped some of the most successful youth and student travel players navigate their journey over the last 15 years: New Horizons.

Started in 1999, New Horizons was the first-ever global study of student and youth travellers using primary research. At that time, it was accepted that this segment of travellers was growing fast, but there was little independent data to quantify a global picture. That's when one of WYSE Travel Confederation's predecessor organisations, The International Student Travel Confederation (ISTC), enlisted the help of the Association for Tourism and Leisure Research and Education (ATLAS) to identify, review, and compile the sparse amount of research on the youth travel market.

The aim of the New Horizons survey has always been to gather consistent and detailed transnational information on the youth and student travel market, combining information on the social and cultural aspects of young travellers (their backgrounds, motivations, and experiences) with data on travel purchases, booking methods, information gathering, destinations, and previous travel experiences. It focuses on various dimensions of the last major trip made by travellers from across the world who are aged 35 or younger. New Horizons is one-of-a-kind in that it was the first specific study to cover the entire journey from trip planning and booking through the trip itself. Rather than deriving conclusions from national tourism statistics, the methodology is based on primary research at a global level, representing the diversity of the youth travel market.

At a very basic level, you can expect to learn the following from New Horizons:

- Who travels, where, why, and how
- How trips are planned and booked
- How much is spent and on what

Given the study's longevity, New Horizons also lends insight to longer term trends and future potential.

New Horizons forms the backbone of WYSE Travel Confederation's research programme because it provides a global overview of all areas of youth and student travel. The New Horizons research has been supplemented by more specialised research projects on specific travel styles, products, and current events, hostels and other innovative forms of youth travel accommodation, festivals as youth tourism destinations, the rise of gastronomy travel, international volunteer travel, and national policies relevant to youth mobility.

Overall the aim of the WYSE research programme is to provide 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.

## What we've learned from New Horizons

The last edition of New Horizons research found that the youth and student travel market had expanded and diversified over the previous decade. Young people were travelling more frequently and visiting destinations in more parts of the world than before. They reported benefitting from their travel experiences and coming home with more cultural appreciation and understanding and a desire to travel again and learn more. They developed friendships, learned languages, adopted customs, shared knowledge, learned new life and career skills, and contributed to the local economy while travelling.

The most obvious changes for youth travel over the last 15 years have been related to the growth of social media and digital communications in general, and the rapid shift to mobile-first Internet connectivity specifically. These changes have revolutionised the way that most people find travel inspiration and book their trips.

**When was the last time you used a phone booth? 44% of youth travellers reporting using one more than once a month in 2002! Postcards and letters have experienced a similar decline; 50% were sending them in 2002 compared with only 15% by 2012.**

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.

**In 2002, more than 30% of young travellers saw themselves as backpackers whereas in 2012 only 12% did.**

The backpacker has been joined by other traveller identities, including the 'flashpacker' and 'digital nomad'. The rise of the flashpacker is at least partially linked to the gradual aging of the youth traveller and the fact that travel styles and motivations once the domain of the young are increasingly popular choices for older travellers. New lifestyle choices combining work and travel have given rise to the digital nomad and been made possible by a convergence of advances in technology, open borders, and a competitive global economy.

**In 2002, 10% of New Horizons respondents said they hitchhiked in their travel destination. By 2012, hitchhiking had nearly fizzled out, with only 1% using this form of transport and arranging it via a website.**

**The Internet was used for sourcing information by 70% of youth travellers in 2002, but only 10% reported booking via Internet at the time. In destination, only about 30% of travellers used the Internet as an information source. Guidebooks were still one of the main sources of information used and Lonely Planet was the dominant one.**

People who are attracted to the flexible and social nature of travelling when young want to maintain this travel style as they get older. This has been an important driver of the expansion of the youth travel industry, which continues to professionalise and innovate to meet the changing demands of young travellers and older travellers travelling in a youth-inspired way. One such example is the boom in stylish and concept-driven, yet affordable design hostels.

**New Horizon asked what services youth travellers wanted to see on the Internet and this is what they have said in the past:**

- **Stories about travels written by ordinary people**
- **Suggestions and tips from travellers**
- **Hostel information- where are they and just how good are they really?**
- **Availability of free places in an airplane**
- **Compare prices for airlines, accommodation, and car rentals**
- **A portal where you can locate different job vacancies**
- **A chat site for people on tour**

**In other words, social media, user-generated content, metasearch, and online booking - all of which have become highly developed in the last decade.**

Most things point to continued growth of the youth travel industry, particularly as demand grows from new emerging markets and people continue to travel in the youth-inspired manner that they have come to love and find meaningful. What remains uncertain and of high concern to many at this moment in time is how the political climate in various regions of the world will impact certain pockets of the youth travel industry, namely those that rely heavily on policies favourable to regulated mobility and the free movement of people across borders.

### **What's new in New Horizons IV**

This is the fourth New Horizons study of global youth and student travel. The aim is to update WYSE Travel Confederation's overview of the global youth and student travel market, which was estimated to include more than 280 million international trips in 2016. The survey has expanded in both scale and scope, going from 2,300 to 34,000 responses over the course of its three iterations. We hope to exceed 34,000 responses this time around.

New to this version of the survey are questions related to visas, terrorism, and city ratings. A [new website](#) has been created and dedicated to the project, along with a logo, this handbook, and a variety of digital marketing materials. Also, the survey has been optimised for mobile and in addition to English and Spanish translations, it is available in a new German translation.

All in all, we hope that these changes and additions will support partners to distribute the survey, attract a record number of responses, and deepen our collective knowledge about the habits and needs of youth and student travellers.

# GUIDELINES FOR GETTING STARTED

## New Horizons website

A website dedicated to the New Horizons survey can be found at <https://newhorizons.wysetc.org/>

## New Horizons survey

The survey will be open for a six month period, late May–November 2017.

## Earn partner status with a unique link

As an acknowledgement of your commitment to the survey and making New Horizons IV a success, organisations that collect the greatest numbers of complete responses will be listed as “partners” in the published report of New Horizons IV. If your organisation would like to participate to earn partner status in the final report, please contact us for your unique link.

## Digital marketing collateral

For your convenience, we have created banners and buttons for you to use with your social media, email campaigns, and website, to help you attract survey responses.

Several [banner options](#) are available for you to promote New Horizons.



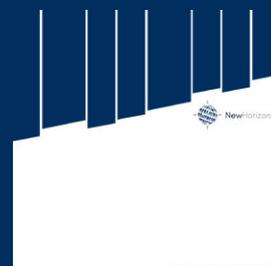
**A.**

Is for promoting New Horizons in general without making personalised changes to the banner.



**B.**

Is a jpeg file with white space for you to add your own content.



**C.**

Is a png file with white space for you to add your own content. In addition, you can underlay your image of choice on the right-hand section on the banner.

We have provided all of the banners in different dimensions suitable for your websites, emails and other promotional material. We have also social media posts optimised for Facebook, Twitter and LinkedIn and if requested we can gladly provide you with posts for Snapchat, Instagram, etc.

These items can be downloaded from the [WYSE website](#).

For those who would like to customise these items with your organisation’s house style and visual identity, we have prepared a New Horizons custom [image pack for download](#). Don’t see something you need here? [Contact us](#) and we’ll see how we can help.

## Data privacy

WYSE Travel Confederation surveys collect data in accordance with these core principles:

- All responses are handled as confidential.
- Data are only reported in aggregated terms and not identified on an individual basis for any reason.
- Data are not shared with third parties.

Distributors of the survey consent that WYSE will collect, record, store, analyse and use the data collected as necessary and in accordance with its data privacy policy and Dutch law.

Any and all data collected and findings resulting from the analysis of the data become the intellectual property of WYSE and WYSE reserves the right to publish these.

## Survey language options

The New Horizons survey is available in English, Spanish, and a new German version. Respondents can select their preferred language on the first page of the survey. The survey will display in one of these languages based on the user's browser settings.

## Promoting the survey

Distributors of the survey agree to use materials as provided and within the guidelines established by WYSE Travel Confederation. Materials include web links to the survey, survey website featuring prizes, wordings, logos, imagery, video, audio, brochures, and other promotional content.

Distributors agree to promote the survey, prize draw, prizes, sponsors, partners, and other distributors of the survey accurately and fairly. Distributors may not copy, distribute or publish the survey inappropriately. Distributors agree not to knowingly collect duplicate or false data.

Distributors agree to observe the official operational time period(s) of the survey and prize draw.

WYSE reserves the right to cancel the participation of a distributor in the event activities are deemed inappropriate or a risk for the survey, WYSE and/or any of its participants or partners.

## Social media

Please share your link to the New Horizon Survey on your social media channels.

Where possible, please use the hashtag **#NewHorizons** so that we can like your posts. WYSE Travel Confederation's social handles are:

**Twitter: @WYSETC**

**Facebook: wysetravelconfederation**

## Inspiration for your tweets and posts

- Tell us how you #travel for a chance to #win
- Where was your last trip abroad? Tell us about it and you could be a lucky winner!
- Where are you travelling to next? #MondayMotivation
- Ready for another trip abroad? #TravelTuesday
- Start the weekend like a winner #NewHorizons has chances to win amazing #travel prizes!
- Fill in the #NewHorizons survey on #travel to #win flights with @Emirates!
- Go to @ExitFestival for free! #NewHorizons #travel #GetEXITED
- Stay in the loop #travel responsibly with @Vagaband Here's a chance to #win one!
- Where to #travel next? Get there with #free @Emirates flights! Fill in #NewHorizons for a chance at this #giveaway
- How about #free #festival tix? Serbia's @EXITFestival is waiting! Fill in #NewHorizons to #win
- #GetEXITED #travel to #Serbia for #summeroflove #NewHorizons has #free #festival tix!
- Ever been to #NYC? Tell us about your dream trip #NewHorizons
- Where in the world have you found the best #foodtrucks? #NewHorizons #travel #survey
- Are you fluent yet? Tell us about #travel to learn a #language for a chance to win some cool prizes!
- #Hostel #hotel #airbnb #couchsurfing? #NewHorizons wants to know where you sleep when you #travel
- Still dreaming about your last trip abroad? Tell us about it in New Horizons for a chance to win one of these amazing prizes!
- Are you ready to travel again? We know of some flights available - fill in the New Horizons survey for a chance to win two Emirates airline tickets!
- Looking for the perfect summer adventure? We know an amazing destination. Fill in the New Horizons travel survey and you could win two tickets to the EXIT Festival in Serbia!
- Heading abroad again? Make sure your trip is a safe one - win one of these cool Vagabands by filling in the New Horizons travel survey!
- Have visa regulations ever stopped you from travelling? Tell #NewHorizons about your experience.

## Sector-specific inspiration for your tweets and posts

The following texts are suggestions for specific programmes, products, and services.

### **Accommodation**

Hostels or couchsurfing – which is best for meeting locals when you travel? Tell us about your experiences and get the chance to win some amazing giveaways!

### **Au pair**

Just back from your aupair experience? Tell us about it to win one of these amazing prizes!

### **Summer camp programme**

How was your last day at camp? Tell us about your summer camp experience in this survey for a chance to win one of these amazing prizes!

### **International education**

Semester abroad done? You didn't just go there to study, did you?! Tell us about your trip and win some amazing giveaways.

### **Gap year**

Don't let your gap year end just yet! Tell us about it and for a chance to win prizes!

### **Internship / Work experience**

Was working abroad the experience of a lifetime? What's next? Tell us about your trip for a chance to win one these prizes!

### **Language programmes**

You didn't go abroad just to learn the language, right? Tell us about your experience for the chance to win amazing prizes!

### **Volunteer travel**

Was volunteering abroad the ultimate travel experience? Tell us about it and you could win flights and take a friend with you next time!

### **Work & travel**

Don't give up your working holidaymaker status just yet! Tell us about your experience for a chance to win one of our amazing travel giveaways!

Your J-1 visa may be expired, but these travel prizes are sure to inspire your next trip. Tell us about your last trip for a chance to win!

### **Tours**

Do you prefer city tours or adventures in the wilderness? Tell us about your last tour for a chance to win some of these amazing travel prizes!

## The prize draw

Thanks to the generosity of several sponsors, respondents of New Horizons IV will have the chance to win some great prizes. Links to sponsor websites, Facebook and Twitter accounts are listed below. If your organisation would like to add a giveaway to the prize draw, please [contact us](#).

### Grand prize:

### Two airline tickets with [Emirates](#)

Facebook: @Emirates

Twitter: @emirates

*Please note that this prize will be awarded with terms, conditions and restrictions imposed by Emirates.*

### Other prizes:

### Two tickets to the [EXIT Festival](#)

Facebook: @exit.festival

Twitter: @ExitFestival

*Please note that this prize will be awarded to a winner in early June as the festival takes place in Serbia in early July.*

### One of twenty [Vagabands](#)

Facebook: @vagabandinfo

Twitter: @Vagabandinfo

Only respondents between 18 and 35 years of age will be entered into the prize draw. Entry to the prize draw is automatic upon submission of a fully completed survey with a valid email address. One entry per respondent is valid for the prize draw.

Entry to the prize draw will close at 23:59 CET on 31 October 2017. WYSE Travel Confederation will identify and contact the winner(s) within fourteen days of the prize draw. WYSE Travel Confederation reserves the right to conduct a new prize draw in order to determine a winner, if necessary.

Prizes are not transferable and are non-negotiable; cash or credit alternatives will not be offered.

In the event a prize becomes unavailable for reasons beyond a sponsor's reasonable control, the sponsor agrees to provide an appropriate and comparable substitute prize agreed upon with WYSE Travel Confederation.

WYSE Travel Confederation, distributors, and sponsors are not responsible for loss or damage arising from an inability to enter due the promotion due to computer failure or viruses, lost, delayed or incomplete entries, and/or any other such causes.

## Contact

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