



Youth Tourism Consortium of Canada

Youth Tourism in Canada

A situational analysis of an overlooked market



March 2004

Published by:

Youth Tourism Consortium of Canada

With the assistance of:

*Hostelling International – Canada
The Student and Youth Travel Association of North America
Canadian Tourism Commission*

Written by:

*Alice d'Anjou
Creative Solutions Communications
alice@danjou.ca*

Table of Contents

1.0	INTRODUCTION.....	1
1.1	REPORT SPONSORS.....	3
1.2	STUDIES OF YOUTH TRAVEL	3
2.0	DEFINING THE YOUTH TOURISM MARKET	4
2.1	DEFINING YOUTH TRAVEL.....	4
2.2	YOUTH TRAVEL MARKET SEGMENTS	5
2.2.1	<i>Youth Group Travel</i>	5
2.2.2	<i>Independent Youth Travel</i>	8
2.3	LEADING COUNTRIES FOR YOUTH TRAVEL.....	10
2.4	THE TREND TOWARDS “WORKING HOLIDAYS”	11
3.0	THE ECONOMICS OF YOUTH TRAVEL	12
3.1	GLOBAL ECONOMIC IMPACT OF TRAVEL AND TOURISM	12
3.2	THE GLOBAL ECONOMIC IMPACT OF YOUTH TRAVEL AND TOURISM	12
3.3	ECONOMIC IMPACT OF TRAVEL AND TOURISM ON CANADA	13
3.4	THE ECONOMIC IMPACT OF YOUTH TRAVEL AND TOURISM ON CANADA	13
3.4.1	<i>Economic Impact of Group Youth Travel in Canada</i>	13
3.4.2	<i>Economic Impact of Independent Youth Travel in Canada</i>	14
3.5	THE MARIER - PALMER MODEL	14
4.0	TRENDS AFFECTING YOUTH TRAVEL	16
4.1	GLOBAL TRAVEL AND TOURISM TRENDS.....	16
4.2	YOUTH TOURISM TRENDS.....	17
4.3	DEMOGRAPHIC TRENDS	18
4.3.1	<i>Demographic Trends in Canada</i>	18
4.3.2	<i>Demographic Trends in the United States</i>	21
4.3.3	<i>Global Demographic Trends</i>	22
4.4	FUTURE TRENDS	23
5.0	IMPLICATIONS FOR YOUTH TOURISM AND TRAVEL IN CANADA	24
5.1	SEEDING FUTURE MARKETS	24
5.2	BARRIERS TO SUCCESS.....	25
6.0	RECOMMENDATIONS.....	26
A)	<i>RESEARCH</i>	26
B)	<i>PROMOTIONS AND PACKAGING</i>	27
C)	<i>PRIVATE/PUBLIC SECTOR COOPERATION</i>	27
7.0	CONCLUSION	27
	REFERENCES.....	28
	APPENDIX A.....	30

Youth Tourism in Canada

A Situational Analysis of an overlooked market

1.0 Introduction

Youth travel itself is not a new phenomenon. Young people have travelled around the world with their families, in groups, or on their own for centuries. The rise in modern youth travel, however, originated shortly after World War II. Born out of international peace initiatives, post-war youth cultural exchanges encouraged young people to travel far from home. At the same time, global tourism began to grow, fuelled by post-war prosperity and the increased availability and accessibility of air travel. The birth of the Baby Boom generation soon produced unprecedented numbers of youth, and youth travel became a widespread trend

Over the past two decades, global tourism has seen significant growth. Youth travel remains a key component of this increase. Current research indicates that youth travel increased by 20 to 25 percent each year through the 1990's – a trend that appears to continue to today, in spite of serious downturns in other segments of the tourism industry. Many industry experts – including the World Tourism Organization, believe that youth travel is the fastest growing travel market segment, accounting for over 20 percent of tourism worldwide.

Global demographic and societal trends support this view. Although the overall trend in North America is towards an aging population, there is a significant “bump” in the current youth generation. Globally, the youth population is steadily increasing. An increasing number of these young people have the inclination to travel (fuelled at least in part by the unprecedented growth of global communication via the Internet), and the economic means to do so. All indications are that these young tourists are travelling more frequently, farther from home, and at a younger age than previous generations.

On the surface, Canada appears to be well positioned to benefit from this global increase in youth tourism. A strong economy, a safe, stable environment, and diverse cultural and natural attractions would appear to be strong draws in an increasingly uncertain world.

But, the Canadian tourism industry has, as a whole, been slow to recognize the importance of youth travel as a strong and growing market sector. While some industry operators have embraced the youth travel target market with considerable success, the youth travel market in Canada has been largely overlooked, neglected in favour of other sectors.

The Youth Tourism Consortium of Canada (YTCC) believes that youth tourism is a lucrative and growing market. The *Marier-Palmer Economic Model*, introduced in this report, is the first known attempt to measure the economic impact of youth travel on Canada. Preliminary results from the Marier-Palmer model confirm the belief of many industry leaders that the youth tourism market in Canada is much larger, and more

economically significant than is currently recognized by most provincial and federal government tourism agencies. These findings support an urgent call by the YTCC for greater support for youth tourism from both the public and private sector.

Canada is also facing growing competition in the global youth travel market. Established Western European markets such as Germany and France have always been viewed as prime destinations for young, independent travellers. Over the past decade, however, new markets such as Australia and Thailand have emerged as leading destinations for young travellers from around the world. In just the past two years, new players such as Brazil and England have launched aggressive, youth-targeted promotional campaigns that are showing impressive results.

These are significant developments that the Canadian tourism industry ignores at its peril. Young travellers soon become adults, who, as they launch careers and start families, are likely to follow travel and tourism patterns that they established in their youth. For the tourism industry, young travellers represent a lifetime of travel revenue.

In order to capitalize on current and future opportunities, the Canadian tourism industry must move quickly to recognize young travellers as a distinct and important market segment, with significant potential for long-term growth and economic impact. This report sets out a series of recommendations including more research, new private-public sector initiatives and increased funding and support at all levels, that will help ensure that Canada attracts and maintains a significant share of the global, youth tourism market.

1.1 Report Sponsors

This report was commissioned by the Youth Tourism Consortium of Canada (YTCC). It was written in cooperation with Hostelling International – Canada and the Student and Youth Travel Association of North America (SYTA), and co-funded by the Canadian Tourism Commission (CTC).

The YTCC and SYTA are the leading organizations in North America dedicated to exploring and expanding the youth travel industry. YTCC was founded in 2001 and currently has 18 member organizations representing various sectors of the youth travel industry in Canada. Most of the members of the YTCC are also members of the Canadian caucus of SYTA.

SYTA was founded in 1997, and currently has over 450 member organizations representing the student and youth travel industry in the United States and Canada.

Hostelling International – Canada was founded in 1933 and is the Canadian representative of the International Youth Hostel Federation with more than 50,000 members and 70 hostels across Canada.

The CTC is a consortium of Canadian public/private sector partners representing provincial and regional tourism associations, government agencies, hoteliers, tour operators, travel companies and attractions managers.

1.2 Studies of Youth Travel

Although many industry experts have believed for some time that student and youth travel is an important market segment, serious research to identify and understand the characteristics of the modern young traveller has been very limited. In the past five years, however, the level of interest in youth travel – and the body of available literature, has increased.

In recent years, an increasing number of workshops and conferences focussing on youth travel have been held around the world, allowing industry players to share experiences and ideas. Industry organizations such as the World Tourism Organization have begun to release statistics that focus specifically on young travellers. Some individual countries have conducted targeted research studies with the goal of expanding their share of what they perceive to be a lucrative market. And, in September 2003, the International Student Travel Confederation (ISTC) and the Association of Tourism and Leisure Education (ATLAS), released a landmark report, *Today's Youth Travellers: Tomorrow's Global Nomads*, which offered the first clear image of the modern youth traveller based on direct, primary surveys of the travellers themselves.

In North America, the YTCC and SYTA have conducted several industry surveys in the past few years, establishing valuable benchmark data on the approximate size of the youth travel and tourism market here. In 2002, the YTCC commissioned two key studies from the Urban and Tourism Studies Department of the Université du Québec à Montréal. The first, *Youth Tourism Situational Analysis – Leading Countries Analysis, (December 2002)*, involved an extensive literature review of existing material on youth tourism and travel, and identified clear trends in destination countries for young travellers world-wide. The second, *Youth Tourism Situational Analysis – Database, (December 2002)*, resulted in a preliminary inventory of Canadian organizations involved in servicing the youth travel market, and provided a glimpse at the potential size of the youth travel support network in Canada.¹

Taken together, these various resources, begin to provide an overall picture of the global youth travel market. However, the size and importance of the youth travel market in Canada remained unclear. In an effort to clearly establish the importance of youth travel to the Canadian tourism industry, Joel Marier, National Executive Director of Hostelling International – Canada and current chair of the Youth Tourism Consortium of Canada (YTCC), and Michael Palmer, Executive Director of the Student and Youth Travel Association of North America (SYTA), developed the *Marier-Palmer Economic Model*.

Based on data from various sources, including industry surveys, Statistics Canada and the Canadian Tourism Commission, the *Marier-Palmer* model provides a preliminary measure of the economic impact of youth travel and tourism on Canada.

2.0 Defining the Youth Tourism Market

2.1 Defining Youth Travel

To date there is no widely accepted definition of the youth travel market segment. This lack of clarity contributes to the difficulty in measuring its size and characteristics.

The World Tourism Organization (WTO) defines the “young” tourism market as travellers 16-25 years old, who take a trip of at least one night’s stay.

The Youth Tourism Consortium of Canada (YTCC) expands on this definition to include young adults between the ages of 26 and 30. This expanded definition is supported by recent statistics, and the experience of YTCC member-organizations, which indicate that these young adults tend to follow similar travel and tourism patterns as their slightly younger cohorts. Many Canadian tourist attractions and youth-targeted programs also extend “youth” discounts to participants up to 30 years of age.

¹ Copies of these reports are available upon request from the YTCC for a nominal fee.

The Student and Youth Travel Association of North America (SYTA) also expands on the WTO definition to include youth under 16 years of age. This is in part in recognition of the growing number of younger children travelling with school, church and other youth groups.

Therefore, for the purposes of this report, the *Canadian youth tourism market* is defined as:

- *young people 30 years of age and under, who are travelling outside the family unit, not for business, and not primarily to visit friends or relatives, and whose travel includes at least one overnight stay.*²

Under this definition, the youth tourism market in Canada includes:

- *all trips and tours of at least one night's stay;*
- *domestic and international travel and;*
- *group and independent travel.*

2.2 Youth Travel Market Segments

One of the challenges of defining the youth travel market is that it is far from homogenous. Different groups within this market have unique characteristics and motivations for travel, and require different products to suit their needs.

At the highest level, the youth travel market can be divided into two broad categories: *independent youth travel* and *youth group travel*.

2.2.1 Youth Group Travel

Youth group travel consists of a group of six (6) or more unrelated young people travelling together. Some industry experts further divide the youth group travel segment into two groups: *school-based youth group travel* (also often referred to as “student travel”) and *non-school based youth group travel*.

Often referred to as “student travel,” **school-based youth group travel** is specifically sanctioned by the sponsoring school, school board or school district. School based youth group travel may be driven by curriculum-related activities and/or semi-curricular or

² It should be noted that although day-trip travel is not covered in this report, both the YTCC and SYTA consider day-trip travel to be valid youth tourism activities. The experiences gained on these day-trips (often as part of a school or youth group) help to lay the foundations for future travel experiences farther a field. They are also an important economic generator for local tourism and attractions.

extra-curricular activities such as music performances and sports competition. Travel and activities are generally undertaken as a group, accompanied by teachers, school personnel and/or other adult chaperones. Destinations are chosen by adults, who are responsive to marketing initiatives that show how the destination will meet their curriculum and/or travel goals. Itineraries tend to be fast paced, highly structured and educationally oriented, with some fun activities thrown in. These groups are highly security conscious and very averse to risk.

Although school based youth group travel may involve students enrolled in Kindergarten through Grade 12, the majority is evenly split between the middle (Grades 6 - 8) and high school (Grades 9-12) years. Middle school travel is most often curricular driven class-trips, while high school travel is most often music performance, language/cultural or sports-based. The average age for a student's first school-based trip is now three to four years younger than it was 20 to 30 years ago.³ Overnight school-based youth group travel begins today as young as 4th or 5th grade.

Often referred to as simply "youth-group travel," **non-school-based youth group travel** is generally by an organized group such as a sports team, church group, cultural/music performance troupe or Scouts/Guides. Most activities are generally undertaken as a group, and are generally supervised by adult chaperones. Travel is often undertaken as a group, but may also occur in smaller groups, led by parents or other adult chaperones. Decisions on destinations tend to be event-driven, and are often made with the involvement of the youth participants. Travel organizers are responsive to event-related marketing initiatives. Itineraries are also event-driven, but industry experts report a recent increase in interest by these groups in local attractions outside the main event. Another emerging trend with this segment is for families to accompany individual participants, extending their stay by several days before or after the main event. Most non-school-based youth group travellers are under 18 years of age.⁴

All youth group travellers are price sensitive, in the sense that they are more strongly influenced by price related issues than the average business or convention traveller. However, travel operators note that some inflexible features of youth group travel (such as the need for security, travel motivated by set curriculums and/or predetermined special events, and limited windows for travel), can limit price flexibility.

Travel operators also report differences in price sensitivities between different groups. For example, operator led youth travel groups tend to be somewhat less price sensitive for accommodations than group-led youth travel groups, while domestic youth travel groups are somewhat more price sensitive for attractions than international youth travel groups.⁵

³ SYTA Active Canadian Members Survey, 2003

⁴ Ibid.

⁵ Ibid.

Fig. 1 Youth Group Travel Profile

	School Based Youth Group Travel	Non-School-Based Youth Group Travel
Group Characteristics	<ul style="list-style-type: none"> • Primarily middle and high school students, but getting younger: some participants as young as 4th and 5th grades • Organized and sponsored by school or school personnel • Very risk averse/safety oriented • Destination choices driven by curriculum needs OR extra-curricular activity needs • Class trips, language study, music/performance, sports competition • Responsive to marketing initiatives that demonstrate how will meet curriculum needs • Education-oriented, structured itineraries with some fun activities • Adults make decisions 	<ul style="list-style-type: none"> • Primarily middle and high school aged youth (under 18 yrs) • Organized and sponsored by parents or adult supervisors • Destination choices primarily event driven • Sport tournaments, music festivals, church events, cultural events/attractions • Responsive to event based marketing initiatives • Event-oriented itineraries with some fun activities • Youth participate in decisions
Motivation For Travel	<ul style="list-style-type: none"> • Education (class trips - curriculum needs) • Language study • Music/performance • Sports competition 	<ul style="list-style-type: none"> • Music/performance groups • Sports tournaments/competitive travel teams • Special interest/leisure groups/Scouts/Guides • Adventure travel • High School Senior Graduation trip • Cultural immersion/Language study
Emerging Trends	<ul style="list-style-type: none"> • Younger participants • Destinations farther from home • Increased societal support for youth travel 	<ul style="list-style-type: none"> • Families may accompany participants for extended stays pre or post-event • Younger participants • Destinations farther from home • Increased societal support for youth travel

Source: SYTA Active Canadian Members Survey, 2003

2.2.2 *Independent Youth Travel*

Also sometimes referred to as “free independent youth travellers,” or “foreign independent youth travellers,” *independent youth travellers* travel alone, or in small, informal groups. It is only very recently that serious attempts have been made to define and study this market segment. It should also be noted that this too is not a homogenous group – there do appear to be significant differences in spending patterns and travel needs between various age groups of independent young travellers⁶, and between foreign and domestic independent youth travellers⁷. However, for the purposes of this report, a general profile of independent youth travellers can be drawn.

Today’s independent youth travellers tend to be well educated, well informed, and Internet savvy. Most are students between the ages of 18 and 26, although some are young professionals who are either unemployed, or taking time off between school and “settling down”.⁸ Some industry experts also report a growing number of independent youth travellers between the ages of 15 and 17, often accompanied by an older traveller, 18 to 19 years old⁹; and an increasing number of young adults between the ages of 26 and 30.¹⁰

Most independent youth travellers head for destinations farther from home, stay longer, and spend less daily but more in total than the average adult tourist. They appear to be price sensitive for travel, housing and food, but less so for entertainment, shopping and attractions¹¹. Domestic independent youth travellers tend to plan shorter trips, to one or two specific destinations. Foreign independent youth travellers tend to have longer stays, and are more likely to travel intra-regionally¹². Almost all independent youth travellers are experience-driven. They want to explore different cultures, increase their knowledge, and experience excitement.¹³ They tend to plan flexible itineraries around informal, active and participatory activities.¹⁴

A growing number of independent young travellers appear to develop a thirst for travel, which they satisfy by building “travel careers,” or taking several “once in a lifetime trips”, to increasingly “challenging” destinations¹⁵.

As a group, independent youth travellers appear to be somewhat responsive to marketing initiatives when choosing a destination, but word of mouth is the most important factor

⁶ ISTC, 2003

⁷ J. Marier, Interview, December, 2003

⁸ ISTC, 2003

⁹ M. Palmer, Interview, December, 2003

¹⁰ J. Marier, Interview, December, 2003

¹¹ SYTA Active Canadian Members Survey, 2003

¹² J. Marier, Interview, December, 2003

¹³ ISTC, 2003

¹⁴ UQAM – Leading Countries Analysis

¹⁵ ISTC, 2003

influencing their actual decision-making, especially after arrival.¹⁶ Technology is also an extremely important influencing factor with this group. The Internet figures strongly in their detailed pre-trip planning, on the road for keeping in touch with family and friends, and post-trip for staying in touch with new friends and for exchanging ideas and experiences with other travellers.¹⁷

Fig. 2 Independent youth Travel Profile

	Independent youth Travellers
Characteristics	<ul style="list-style-type: none"> • Between 15 and 30 years old • Highest concentration between 18 and 26 years old • Well educated - most often students or previous students • Travel independently, or with 1-2 friends • Risk-friendly, experience oriented • Responsive to destination/experience based marketing initiatives • Detailed pre-trip planning • Flexible itineraries, influenced by word-of-mouth • Lower incomes, but willing to save/combine travel with work in order to finance travel • Older age group (26-30) more affluent, less adventuresome • Lower daily spending, but longer stays resulting in higher overall spending per trip • Internet savvy/globally connected before, during and after travel • Increasingly travel savvy
Motivation for Travel	<ul style="list-style-type: none"> • Explore other cultures • Excitement/adventure • Increase knowledge and experience through self-discovery • Relaxation • Social interaction • Working holidays
Emerging Trends	<ul style="list-style-type: none"> • Increasing numbers overall • Increasing numbers of younger youth (under 18 years) and young adults (26 to 30 years) travelling • Building “travel careers” – multiple trips to increasingly “challenging” destinations • Increased societal support for youth travel

Source: Various – see footnotes

¹⁶ UQAM – Leading Countries Analysis

¹⁷ ISTC, 2003

2.3 Leading Countries for Youth Travel

Identifying leading destination countries for youth travel is difficult. While global statistics for international arrivals are well documented by the WTO and most national tourism offices, there is very little data available based on age. Leading destinations for youth travel must be projected based on current world travel trends, and individual countries tourism strategies.

According to the WTO, Europe and the Americas remain the world's primary youth travel destination areas. However, new destination areas such as Asia Pacific, Africa and the Middle East are steadily increasing their market share.¹⁸

Independent youth travellers are known to be pioneers, often heading to non-traditional destinations. Since it is estimated that young travellers make up to 25% of the global travelling population, it is reasonable to propose that the growing interest in new tourism regions reflects--at least in part, prevailing youth travel patterns.

In contrast, youth group travellers tend to be more conservative in their choices, choosing more established, traditional destinations, especially for international travel. However, youth group travellers can be attracted to non-traditional regions within established destinations, especially by high profile, attractive events.¹⁹

Independent youth travellers are also known for detailed pre-trip planning, and are believed to be responsive to marketing initiatives. A recent study conducted by the Université du Québec à Montréal identified five leading destination countries for youth tourism based on their national tourism strategies. Australia, France, New Zealand, Thailand and the United Kingdom have all identified young travellers as a priority group in their overall tourism market, and are reporting impressive results from youth-targeted promotional campaigns.

Australia, one of the first players in this market, has been especially aggressive. Integrated marketing campaigns, combined with other innovative initiatives such as the introduction of a unique work/travel visa have been especially successful in attracting young independent travellers to Australia. For example, one campaign yielded an impressive 30 % increase in sales, and Australia is now considered one of the leading destinations for youth travel, especially for increasingly popular working holidays. New Zealand and the United Kingdom are also attracting large numbers of young independent travellers with targeted promotional campaigns focussed on outdoor adventure, culture, heritage and fun, accessible and inexpensive accommodations, and flexible work/study/travel options. France is successfully promoting cultural experiences and budget hotels, especially to young European travellers. Thailand is making efforts to promote itself as a safe destination for young independent travellers, Thailand has also

¹⁸ WTO Tourism Highlights 2003

¹⁹ M. Palmer, Interview, December, 2003

started to encouraging organized student groups to come and immerse themselves in Thai culture and to participate in conferences and other large, special events.²⁰

Industry experts also consider Germany, the United States and Canada to be important youth travel destinations, but none of these countries are known to have launched organized marketing campaigns to target the youth market.²¹

2.4 The Trend Towards “Working Holidays”

The fastest growing segment of the global independent youth travel industry is young people who are combining travel and work experiences. Most of these independent youth travellers take advantage of government programs and/or flexible visas that allow them to work in their host country for the duration of their stay, in order to supplement travel expenses. A smaller but still significant number of youths participate in work-exchange programs such as The Student Work Abroad Programme (SWAP) of the Canadian Federation of Students.

The United States is the leading destination for many youth travellers on working holidays with close to 250 000 foreign youth participating in various organized programs. Canada ranks fourth as a destination for inbound youth travellers on working holidays, behind the U.S., Australia and Britain.²² SWAP estimates that over 20,000 foreign students and youth participated in various working holiday programs in Canada in 2003, while close to 19,000 Canadian students and youth took advantage of similar schemes abroad.

Upon arrival in Canada, over 90% of young foreigners seeking work do so in Ontario, British Columbia, Alberta and Quebec. There are seasonal variations: Western Canada is more popular in winter thanks job opportunities offered by the ski industry, while Toronto is the most popular destination in summertime. It should also be noted that the majority of young people participating in working holidays in Canada do travel after their work experience, many of them travelling to other parts of the country. Many, however, will also take the opportunity to visit parts of the United States.

²⁰ UQAM– Leading Countries Analysis

²¹ Ibid.

²² D Smith, Interview, February 2004

3.0 The Economics of Youth Travel

3.1 Global Economic Impact of Travel and Tourism

The impact of the travel and tourism industry on the global economy is significant. The World Tourism Organization reports that the travel and tourism industry generated over US\$ 474 billion (C\$6.1 billion) of direct expenditures worldwide in 2002.²³

Based on 2002 data and prevailing trends, The World Tourism and Travel Conference predicted that in 2003 the industry would generate US \$4,544 billion (C\$5907 billion) of total economic activity, including direct expenditures, jobs, capital investments, government spending). This represents the equivalent of 3.7 % of the global Gross Domestic Product.²⁴

3.2 The Global Economic Impact of Youth Travel and Tourism

According to the World Tourism Organization, in 2001, young travellers represented approximately 20% of all international tourist arrivals – some 140 million per year. At the time, the WTO estimated that the global youth travel market had been growing by close to 5% annually for several years.²⁵ This was (and remains) notably higher than the average annual growth for the general tourism market of 2.7% in 2002 and –1% in 2001.²⁶ If this growth rate is maintained, by the year 2005, young travellers will represent 25% of all international travellers.²⁷

There are no firm figures available, but we can estimate that if youth travel represents approximately 20% of global tourism, then we can estimate the total economic impact of youth travel, worldwide, at approximately C\$1,100 billion, with significant potential for growth.

²³ WTO Tourism Highlights 2003

²⁴ WTTC: Economic Research 2003

²⁵ BITS Seminar 2001

²⁶ WTO Tourism Highlights 2003

²⁷ BITS Seminar 2001

3.3 Economic Impact of Travel and Tourism on Canada

Canada currently ranks as the 9th tourism destination in the world, behind Mexico, China, the United Kingdom, the United States and France, among others.²⁸ Not surprisingly, the impact of the travel and tourism industry on the Canadian economy is significant.

The Canadian Tourism Commission reports that in 2002, the travel and tourism industry in Canada generated \$51.8 billion in direct expenditures, while the total tourism Gross Domestic Product reached C\$23 billion, or 2% of Canada's GDP.²⁹

3.4 The Economic Impact of Youth Travel and Tourism on Canada

Until recently there has been limited data to support what many industry experts have believed for some time: that youth travel is a major contributor to the overall travel and tourism market in Canada. Current research, however, supports this theory, and may indicate that the youth travel market is even more significant than previously thought.

3.4.1 Economic Impact of Group Youth Travel in Canada

Youth group travellers have a significant impact on the local/regional economy, especially in smaller centres. Industry experts familiar with the youth group travel market estimate that up to 70% of all schools in Canada sponsor at least one school-based trip per year. The average domestic school-based trip in Canada is three nights/four days long, and the average cost of the trip is C\$416 per person (approximately C\$139 per traveller, per day).³⁰ The average student tour operator in Canada works with 14, 875 young travellers each year, and reports an average of C\$4.621 M in revenue³¹.

Industry operators report that school-based travel increased between 20% and 25% each year through the 1990's, and is continuing to grow. Although school-based travel has not been immune from the industry-wide post-September 11th slump, it is one of the few industry sectors that continues to report steady growth (up an average of 8% in 2003 compared to a global average increase of 2%).³² Based on advance bookings (completed by October 2003), most industry operators in Canada and the United States are predicting an average increase of 10% to 14% in both passengers and revenue for 2004.³³

²⁸ WTO Tourism Highlights 2001

²⁹ CTC Canadian Tourism Facts and Figures 2002

³⁰ SYTA Active Canadian Members Survey 2004

³¹ SYTA Active Canadian Members Survey 2003

³² WTO – Tourism Highlights 2003

³³ SYTA Active Canadian Members Survey 2003

Industry operators working with non-school-based youth groups report similar statistics and make similar predictions.³⁴

3.4.2 *Economic Impact of Independent Youth Travel in Canada*

Independent youth travellers in particular view long trips as “once in a life-time” opportunities and they are prepared to spend a lot of time, energy and money to ensure that their expectations are met.³⁵ Although their incomes tend to be lower than that of the average adult tourist’s (in a recent survey 51% reported earning less than US\$5 thousand (C\$4 thousand) per year, young travellers are prepared to save and/or work during their trip to finance their travels. This is evident in the growing popularity of working holidays for students and youth.

Studies show that independent youth travellers tend to spend less daily than the average tourist (approximately C\$144 per day)³⁶, and often travel in shoulder season, when prices are perceived to be low. However, they tend to have longer stays (over 60 days, on average), resulting in higher total spending over the course of their trip.³⁷

Independent youth travellers are pioneers. They take pride in “getting off the beaten track,” and are often willing to go to considerable lengths to reach non-conventional attractions, opening up new travel and tourism opportunities by doing so.³⁸ These pioneers have a unique economic impact on the local/regional economy as they will tend to spend their money on local goods and services.³⁹

3.5 **The Marier - Palmer Model**

The statistics cited above—while useful, provide a piecemeal picture of the economic impact of youth travel on Canada. In an effort to present a more complete and statistically useful measurement, Joel Marier, National Executive Director of Hostelling International – Canada and the current chair of the Canadian Youth Tourism Consortium (CYTA), and Michael Palmer, Executive Director of the Student Youth Travel Association (SYTA), working with various youth travel industry partners, developed a preliminary economic model for youth travel in Canada.

According to the Marier-Palmer model, total youth travel expenditures in Canada in 2002 were approximately C\$12.3 billion (see Figure 3). This represents close to 23% of the C\$51.8 billion in total travel and tourism industry expenditures in Canada that year, or C\$4.67 billion in tourism GDP⁴⁰.

³⁴ M. Palmer, Interview, December 2003

³⁵ ISTC 2003

³⁶ Statistics Canada, Foreign Travellers to Canada, 1997 Calendar Year

³⁷ ISTC 2003

³⁸ UQAM – Leading Countries Analysis

³⁹ Ibid.

⁴⁰ Glynn, T., Personal e-mail, January 2004

Fig. 3 Marier-Palmer Model of Economic Impact of Youth Travel on Canada

Youth Travellers to and within Canada for the Year Ending December 31, 2002

Chart 1

Youth Travelers Broken down by Age

(Person-Nights)

	Under 20	20-24	25-30 (Est.)	Total 30 & Under	% of All Age Travelers	Total All Ages
Domestic	41,627,000	10,791,000	13,411,200	65,829,200	40.0%	164,636,000
From the US	5,153,100	1,103,700	2,011,800	8,268,600	18.4%	45,044,800
From Overseas	4,703,900	3,868,600	3,483,300	12,055,800	39.1%	30,865,500
Total	51,484,000	15,763,300	18,906,300	86,153,600	35.82%	240,546,300

Chart 2

Youth Travelers Traveling in a Group vs. Traveling Individually

(Person-Nights)

	Under 20	20-24	25-30 (Est.)	Total 30 & Under
Group Travelers	41,187,200	3,152,660	3,781,260	48,121,120
Individual Travelers	10,296,800	12,610,640	15,125,040	38,032,480

Chart 3

Average Travel Expenditures Per Day of Youth Travelers

Group Travelers	\$139
Individual Travelers	\$144

Chart 4

Direct Economic Impact of Youth Travelers

	Under 20	20-24	25-30 (Est.)	Total 30 & Under
Group Travelers	\$5,848,582,400	\$447,677,720	\$536,938,920	\$6,833,199,040
Individual Travelers	\$1,482,739,200	\$1,815,932,160	\$2,178,005,760	\$5,476,677,120
Total	\$7,331,321,600	\$2,263,609,880	\$2,714,944,680	\$12,309,876,160

Notes:

- Person nights are as reported by Statistics Canada Travel Surveys for January to December 2002 by age excluding visitors traveling to meetings, conventions, conferences, trade shows, seminars, other work or visitors visiting friends or relatives. Domestic travelers are travelers traveling 80KM+.
- The average group travel expenditure per day is based on a survey of Canadian tour operator members of the Student & Youth Travel Association of North America conducted in February 2004. This number includes out of pocket money expended by trip participants.
- The average per day travel expenditure for youth travelers traveling as individual travelers is a projection based on data compiled by Statistics Canada from a 1997 survey of travelers to Canada. This number includes out of pocket money expended by trip participants.

Assumptions:

- Person Nights by age as reported by Statistics Canada is accurate.
- 80% of the 20 to 30 year old visit nights reported are attributable to individual travelers (20% travel as part of a group).
- 80% of the under 20 year old visit nights reported are attributable to group travelers (20% are individual travelers).
- The survey of Canadian tour operator members of the Student & Youth Travel Association of North America (SYTA) that reported the average group travel expenditures per day of \$139 is accurate and that statistic is an accurate average of all group travelers.
- The projection of individual travelers provided by Statistics Canada which reported the average individual travel expenditure of \$144 per day is accurate and that statistic is an accurate average of all individual travelers.

4.0 Trends Affecting Youth Travel

4.1 Global Travel and Tourism Trends

The global travel and tourism market is changing in many ways. First and foremost, the global travel and tourism industry is still feeling the lingering effects of the terrorist attacks of September 11th, 2001. The ongoing conflicts in Iraq and Afghanistan, continued safety and security concerns, an uncertain global economy, and unexpected events such as SARS have all taken their toll. However, we have become a world of travellers, and the World Tourism Organization reports that overall, international tourism enjoyed a small increase in 2002 (3%), following the losses (-0.5%) in 2001.⁴¹ Many industry experts are predicting that global travel and tourism levels will increase steadily over the next few years.⁴²

The uncertain climate of the past two years has accelerated other changes in the industry that appeared to be underway. Travel patterns continued to favour new and emerging destination areas, at the expense of North America. For example, international tourist arrivals to North America declined in 2002 (- 4%), while Europe (+2%) and Africa (+3%) showed moderate growth, and Asia-Pacific (+8%) and the Middle East led with strong growth (+17%).⁴³ These patterns will continue well into the future by some industry projections, with countries such as Laos, Mexico, Angola, Malaysia and Turkey predicted to lead the world in terms of travel and tourism related economic growth by the year 2013.⁴⁴ If these predictions are accurate, and Canada does not take steps to counteract continuing trends, Canada risks slipping well below its current 9th place ranking in worldwide travel destinations.

Other trends of note include accelerated growth of low-cost airlines, especially in North American and Europe, increased domestic and intra-regional travel, and a shift away from organized, group travel to individual “do-it-yourself” experiences, especially for mature and experienced travellers.⁴⁵

This increased interest in domestic and intra-regional travel was clearly evident in Canada in 2002, where, for the first time Canada’s international travel account deficit with the United States was lower than its deficit with other international destinations.⁴⁶ If, as industry experts suspect, this renewed interest in Canada as a destination for American travellers is tied to ongoing safety and security concerns, Canada may have a

⁴¹ WTO Tourism Highlights 2003

⁴² WTTC: 2003 Travel and Tourism Economic Research

⁴³ WTO Tourism Highlights 2003

⁴⁴ WTTC: 2003 Travel and Tourism Economic Research

⁴⁵ WTO Tourism Highlights 2003

⁴⁶ CTC Canadian Tourism Facts and Figures 2002

unique window of opportunity to promote itself to American markets as a “safe” alternative to other international travel destinations.⁴⁷

The global tourism industry is also still grappling with the implications of the “information age.” While many countries and sectors are successfully harnessing the promotional power of the Internet, other regions – notably Hong Kong and Canada, are still feeling negative effects from the rapid spread of information (and misinformation) about the 2003 SARS outbreak. Although there has been some improvement, industry experts now believe that the impact may be felt for years to come.

4.2 Youth Tourism Trends

According to recent industry surveys, all indications point to continued growth in the youth travel market, but with changing buying patterns.

The student population is growing rapidly worldwide. This bodes well for the youth travel industry as most young travellers are, or were at one point, students. As discussed in more detail in Section 2, this growing group of young people appear to be travelling more often – both in groups and individually, and at a younger age than ever before. They are spending more, going to farther, more adventurous destinations, and expecting more from their travel experience than their parents’ generation did.⁴⁸

There also appears to be increasing societal support for youth travel. Parents, educators and employers – all past generations of young travellers, seem to be viewing independent youth travel as an important contributor to personal development.⁴⁹ This is reflected in increasing youth group travel numbers too: industry operators are reporting that for many school districts, travel has become less of an optional activity and more of an expected part of a well rounded education.⁵⁰

The current and future generations of youth travellers have grown up with the Internet, so it is no surprise that it plays an important role in youth travel, before, during and after the trip.⁵¹ While the Internet facilitates the rapid spread of bad news such as SARS and terrorism, it is also a powerful global connector, and promotional tool. The influence of the Internet on the global youth travel industry should not be underestimated. Independent youth travellers are pioneers in many ways, and are less sensitive to risk than most other travellers. For example, the corporate travel industry in Canada experienced devastating losses in the summer of 2003 following the outbreak of SARS - losses from which it has still not completely recovered. Canadian youth hostels however reported that after a moderate drop, business rebounded back to expected levels less than three months after the initial outbreak.⁵² Similarly, SWAP experienced less than a 1%

⁴⁷ M. Palmer, interview, December 2003

⁴⁸ ISTC 2003

⁴⁹ Ibid.

⁵⁰ SYTA Active Canadian Members Survey 2003

⁵¹ ISTC 2003

⁵² J Marier, Interview, December 2003

cancellation rate due to SARS from foreign participants heading for working holidays in Toronto and Vancouver.⁵³

In addition to changing global travel patterns, Canada is facing some stiff new competition specifically in the youth travel market. In the year since the UQAM completed its *Youth Tourism Leading Countries Analysis*, the number of countries identified as specifically targeting young travellers has almost doubled as new players such as Brazil, Taiwan and Costa Rica have begun to aggressively challenge current leading countries for the heart, minds and dollars of young travellers.

Industry experts also expect the popularity of youth working holidays to continue to increase. Currently Canada has an approximate balance between inbound and outbound young people combining travel with work. However, other countries, such as Britain and Australia, that specifically target the youth travel market, are capitalizing on this growing trend by aggressively marketing flexible work-travel opportunities.

4.3 Demographic Trends

Global demographic trends indicate that the youth travel market has a growing source pool of young travellers.

4.3.1 Demographic Trends in Canada

While much of the discussion around youth travel is often focussed on attracting international arrivals, the importance of our own domestic market cannot be ignored. While the overall demographic profile of Canada is aging, there will always be a pool of young people to draw on. In fact, recent statistics indicate that the youth cohort in Canada is substantial, and growing.

According to Statistics Canada, the kindergarten and elementary school population in Canada (children ages 5 to 12), rose 6% between 1991 and 2001 to 3.2 million. Although this population group is expected to decline slightly over the next decade (-14%)⁵⁴, the current members of this group will then be moving into the secondary and post-secondary school populations – prime ages for youth travel (see Figure 4).

⁵³ D Smith, Interview, February 2004

⁵⁴ Statistics Canada, 2001 Census Analysis Series

Figure 4: Age Shifts in the Canadian Population

Cohort	Year of birth	Age in 2001	Average number of births per year	Size
Pre-WW1	Before 1914	88+	201,000	Relatively small
WW1	1914-1919	82-87	244,000	Relatively small
1920s	1920-1929	72-81	249,000	Relatively large
Depression	1930-1939	62-71	236,000	Relatively small
WW2	1940-1945	56-61	280,000	Relatively large
Baby boom	1946-1965	36-55	426,000	Very large
Baby bust	1966-1979	22-35	362,000	Relatively small
Children of the boomers	1980-1995	6-21	382,000	Relatively large
Children of the baby bust cohorts	1996 on	0-5	344,000	Relatively small

Source: Statistics Canada, 2001 Census Analysis Series

The secondary, college and university population also increased between 1991 and 2001, from 4.6 million to more than 4.8 million, an increase of more than 5%. The population of this group is expected to increase somewhat over the next decade, as the leading edge of the younger cohort starts to reach secondary school.

The population of the younger working-age groups, aged 25-34, declined 18% between 1991 and 2001 to just below 4 million. Projections show that this population may increase slightly (+4%) over the next decade.⁵⁵

These trends pose an excellent opportunity to promote Canada as a prime destination to our own youth population.

Another demographic trend of note is a marked east-west split among the provinces in age patterns. The Atlantic Provinces and Quebec have populations that are older than the Canadian average. Ontario, the territories and the Western provinces had younger populations. The single exception to this general pattern is British Columbia, where the population is relatively older, mostly due to the migration of older people from other parts of the country (see Figure 5).

⁵⁵ Ibid.

Figure 5: Selected Age Distribution Indexes for Canada, the Provinces and Territories

	Median age	Age group distribution		
		0-19	65+	20-64
	years	percent		
Canada	37.6	25.9	13.0	61.1
Newfoundland and Labrador	38.4	25.0	12.3	62.7
Prince Edward Island	37.7	27.3	13.7	59.0
Nova Scotia	38.8	25.0	13.9	61.1
New Brunswick	38.6	24.8	13.6	61.7
Quebec	38.8	24.2	13.3	62.5
Ontario	37.2	26.3	12.9	60.8
Manitoba	36.8	28.1	14.0	58.0
Saskatchewan	36.7	29.2	15.1	55.8
Alberta	35.0	28.3	10.4	61.4
British Columbia	38.4	25.0	13.6	61.4
Yukon Territory	36.1	29.0	6.0	64.9
Northwest Territories	30.1	35.0	4.4	60.7
Nunavut	22.1	46.5	2.2	51.2

Source: Statistics Canada, 2001 Census Analysis Series

Alberta, Saskatchewan and Manitoba are the youngest provinces. Nova Scotia and Quebec have the oldest populations. Alberta and Nunavut have the youngest core working age group (20-60 years old).

It should be noted that the age profile of Manitoba and Saskatchewan is heavily influenced by the high fertility of their Aboriginal populations. 20% of the population aged 19 and under in both provinces are of aboriginal decent.⁵⁶

Canada's growing immigrant population may also have implications for the youth travel industry in Canada. Immigration accounted for almost half of Canada's population growth between 1996 and 2001. Foreign-born residents now make up over 25% of the population in both Ontario (26.6%) and British Columbia (26.1%). The age profile of the immigrant population is similar to that of the general population (see Figure 6). :

⁵⁶ Ibid.

Figure 6: Proportion of Foreign-born Population, Canada, Provinces and Territories

	1991	1996	2001
	%		
Canada	16.1	17.4	18.4
Newfoundland and Labrador	1.5	1.6	1.6
Prince Edward Island	3.2	3.3	3.1
Nova Scotia	4.4	4.7	4.6
New Brunswick	3.3	3.3	3.1
Quebec	8.7	9.4	9.9
Ontario	23.7	25.6	26.8
Manitoba	12.8	12.4	12.1
Saskatchewan	5.9	5.4	5.0
Alberta	15.1	15.2	14.9
British Columbia	22.3	24.5	26.1
Yukon	10.7	10.4	10.6
Northwest Territories	4.9	4.8	6.4
Nunavut	1.7

Source: Statistics Canada 2002: Canada's ethnocultural portrait

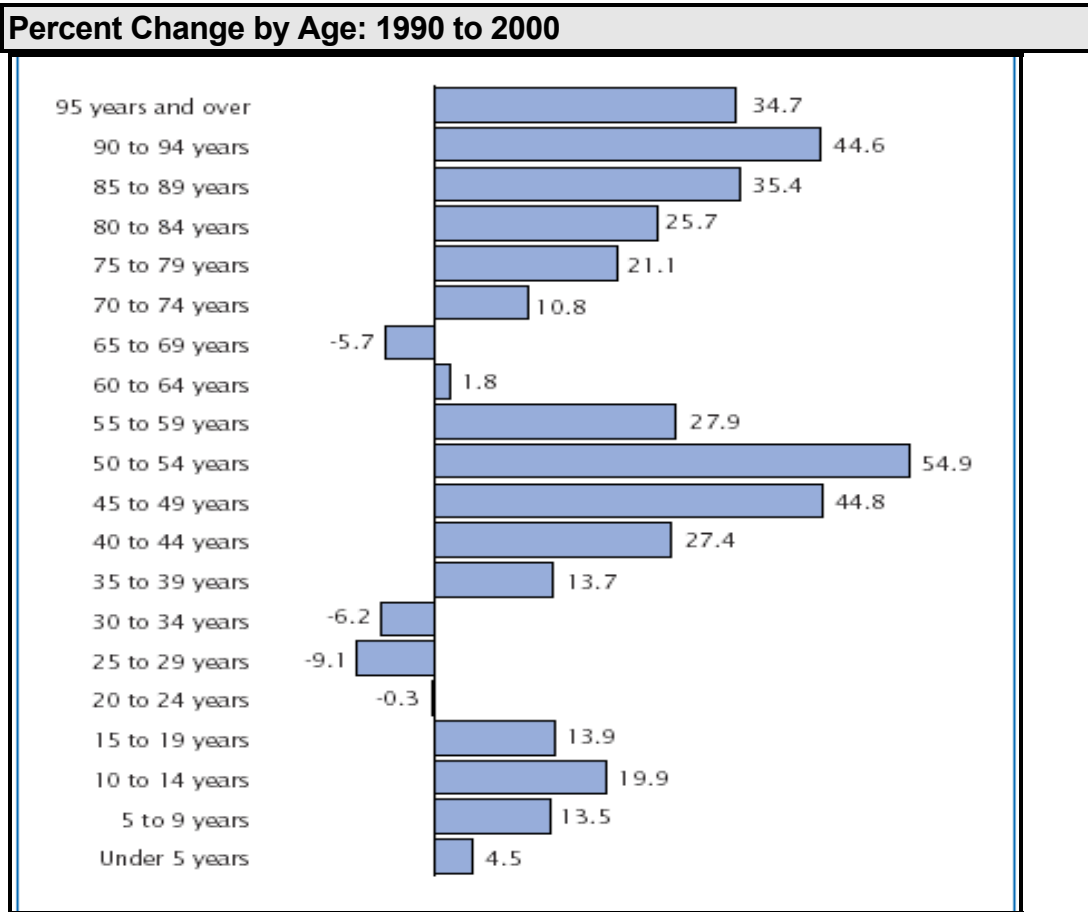
Clearly the face of Canada is changing. What this may mean for the youth travel industry is unclear, but one may ask if young immigrants, or the children of immigrants, can be convinced to explore their adopted home, rather than casting their eyes on more distant travel destinations.

4.3.2 Demographic Trends in the United States

Demographic trends in the United States are similar to those in Canada. While the overall demographic profile of the United States is aging, there will always be a pool of young people. In fact, according to the U.S. Census Bureau, the United States accounts for one of the largest shares of the world's children under 15 years old.

Currently, the United States is experiencing a youth cohort "bump" similar to the one in Canada (see Figure 7). Regional population distribution by age also follows a similar pattern to Canada, with the west and the south showing the highest concentrations of young people under the age of 18 years old.

Figure 7: Percent Change by Age in United States Population



Source: US Census Bureau, 2000

The United States represents an important source market of young travellers for Canada. The renewed interest in domestic and intra-regional destinations reported by the World Tourism Organization may pose an excellent opportunity for Canada to position itself as a “safe” alternative to other international destinations for American travellers.

4.3.3 Global Demographic Trends

Population trends in Canada and the United States mirror similar patterns visible worldwide. Over the next 25 years, it is expected that the over-all world population will continue to age. Projected age shifts in the world population indicate that by the year 2025, the world’s elderly population (ages 65 and up) will more than double. However, the world population is still expected to increase, albeit at a somewhat slower rate than in

the recent past. The same demographic trends predict that over the next two decades the world's youth (under the age of 15) will grow by 6%, and the number of children under the age of 5 years will increase by approximately 5%.⁵⁷

Of particular interest to the youth travel and tourism industry is the expectation that most of the world's net annual gain in population growth will come from the world's developing countries. This trend will have implications for all travel and tourism sectors around the world. For example, the World Tourism and Travel Council is promoting an upcoming conference session with the provocative headline "Emerging Economies Will Be Our Bread and Butter."⁵⁸

In the meantime, recent statistics show that three areas in the world generate the majority of international youth tourism: Europe, North America and Asia Pacific. Some surveys indicate that between 60% and 70% of all young people in Europe will have taken one or more foreign trips in the past year. This represents over 52 million youth travellers originating in Europe alone each year. Among European nations, the Scandinavian countries are important generating markets, while the Mediterranean and Eastern Europe countries are the fastest growing. North America (Canada and the U.S. combined) generates a comparatively low 2 million trips abroad from a pool of approximately 35 million young people. The leading Asian Pacific country is Japan, generating approximately 3 million trips abroad per year.⁵⁹

4.4 Future Trends

In addition to the global tourism and demographic trends noted above, youth travel industry experts expect that youth travel market in Canada will be affected by the following trends over the next five years.

- *An increasingly demanding and challenging market:* Young people, educators and parents are well informed about travel options and costs and will become increasingly more savvy travel consumers. Although today's youth are more affluent than their predecessors, they will shop around until they are satisfied that their hard-earned dollars are being well spent, and that their travel expectations will be met.
- *Ongoing concerns about safety and security:* This will pose both a challenge and an opportunity, especially for the youth group travel industry. Youth group travel organizers are particularly sensitive to risk. Careful, targeted marketing and innovative packaging may help to generate new interest in "safe" Canadian destinations for youth group travellers. Independent youth travellers are not as sensitive to security concerns. In fact Canada's traditional image may be too "safe" for

⁵⁷ US Census Bureau, World Population Profile: 1998

⁵⁸ WTTC, News Release, 14/01/2004

⁵⁹ BITS Seminar, 2001

experienced young independent travellers seeking challenge and adventure.

- *More people are becoming involved in the travel decision:* This too is especially relevant for the youth group travel industry. School boards are becoming increasingly involved in decisions around school-based travel, and parents and other family members are showing a growing interest in accompanying other youth groups on trips, especially to major events.
- *Sustained economic growth:* The global economy appears to be on a slow upswing. All travel and tourism traditionally increases during good economic times.
- *Increasing influence of technology:* The rampant spread of the Internet has opened up unprecedented communication channels worldwide. The implications for the youth travel industry are far-reaching, including opening up new markets, new promotional and packaging opportunities, and new service and product opportunities. Young travellers today are fully “wired,” relying on the Internet at all stages of travel.

5.0 Implications for Youth Tourism and Travel in Canada

5.1 Seeding Future Markets

Until recently, the youth travel market has been largely overlooked-- a lucrative secret for those that recognized it and mined it effectively. But it appears that it may not remain a secret for very long. Young travellers are a large and growing segment of the global tourism market, and an increasing number of countries have recognized the inherent potential in attracting these young travellers. This is a significant development that the Canadian tourism industry ignores at its peril.

The Marier-Palmer model demonstrates that youth travel represents a significant portion of the Canadian travel market. However, there is room for significant growth.

Canada has a great deal to offer to young travellers – from wilderness adventures to cultural treasures and vibrant cities, all at a reasonable cost and in a relatively “safe” environment. But, Canada must move quickly if it is to retain and increase its market share. Experience tells us that young travellers eventually become adults, who, as they launch careers and start families, are likely to follow travel and tourism patterns that they established in their youth

Tapping into the youth travel market today is an important way to seed the market for the future. Action--or inaction, today, will have long-term consequences for the travel and tourism industry in Canada.

5.2 Barriers to Success

The Marier-Palmer Model shows that the youth travel market already has a positive impact on the Canadian economy. With the youth travel industry poised for significant growth, this impact could be substantially increased. There are, however, significant barriers that must be overcome before the Canadian tourism industry will be able to capitalize on current and future opportunities that the youth travel market presents.

1. The youth travel industry is still poorly understood. The Canadian Tourism industry must recognize young travellers as a distinct and important market segment, and take steps to research its characteristics in order to mine its potential effectively.
2. Canada has not positioned itself to attract the youth travel market. If youth are the future of tourism. Canada must find ways to position itself as vibrant, diverse and active – in other words, attractive to young travellers. Canada must seek to understand youth travel patterns from all three of its youth travel source markets: domestic, United States, and International. And, it must aggressively promote itself as a prime youth travel destination, or risk losing an entire generation of travellers—and their tourism dollars.
3. The Canadian tourism industry is not currently organized to exploit the youth travel market. Increased private-public sector cooperation, sharing and financial support are required to encourage the maximum number of players to receive the maximum benefit.
4. The youth travel market is currently not a priority for the Canadian tourism industry. Convention, corporate and leisure travel are generally seen as the priority markets. Promotions and marketing are focussed primarily on the “Baby Boom” generation.

6.0 Recommendations

As a whole, we recommend that the Canadian tourism industry invest in several areas related to youth tourism.

A) Research

1. ***Confirm and expand the Marier-Palmer economic impact model.*** The economic impact of youth travel worldwide appears to be substantial and growing. The Marier-Palmer model offers a preliminary measure of the economic impact of youth travel in Canada. More research is required to expand the Marier-Palmer model, confirm its underlying assumptions, increase the accuracy of the estimates, and determine the implications for the Canadian tourism industry now and in the future.
2. ***Substantially increase our understanding of the youth travel marketplace.*** Preliminary examination of existing data supports the argument that the youth travel market is different from other travel and tourism markets, and must be approached differently – but how? Better knowledge about the characteristics of this group will help both the private and public sectors to package and promote our services and attractions more effectively to this important market segment.
3. ***Explore the implications of current and future demographic and economic trends.*** Statistics show us that the world's population is changing rapidly, sometimes in unexpected ways. Canada's population statistics are also changing. These changes may have long-term implications for the youth travel industry. A more in-depth examination of current and future demographic trends will provide valuable direction for both international and domestic marketing.
4. ***Share/distribute the knowledge and research results across the private and public sectors.*** Knowledge is power. Sharing the knowledge gained from research conducted into the youth travel market will create synergies throughout the entire Canadian tourism industry.

B) Promotions and Packaging

- 5. *Develop youth-focussed marketing, packaging and promotions for Canada as a destination.*** Canada must recognize young travellers as a distinct and important market, and develop marketing campaigns, packages and promotions that target this market accordingly. There are several international success stories to learn from. We need to learn from their experiences and build on their examples to create a unique Canadian product.

C) Private/Public Sector Cooperation

- 6. *Provide financial and organizational support for market enhancement activities.*** Recognizing and targeting the youth travel market will require a committed, coordinated effort by the entire Canadian travel and tourism industry. Increased private/public sector cooperation must be achieved. The Canadian Tourism Commission, along with provincial and local tourism organizations, should provide financial and organizational support to private and public sector activities that will help Canada to capitalize on current and future opportunities in the youth travel market.

7.0 Conclusion

Youth travel is a significant, but largely overlooked, segment of the travel and tourism industry in Canada. Today, Canada is facing an important window of opportunity to capitalize on current global trends to increase its share of the youth travel industry. Now is the time to reach out to growing international and domestic markets and draw increasing numbers of young travellers to Canada. Changes to global demographic and travel patterns, coupled with daily growth of technology, offer unprecedented access to the large, worldwide youth cohort now entering their prime travel years. By capturing our share of the youth travel market today we will increase our share of global travel and tourism expenditures for decades to come. But, Canada must act soon, or risk being left behind by other leading countries that recognized the potential in the youth travel market, and positioned themselves accordingly.

References

- Canada. Statistics Canada. 1997. *Foreign Travellers to Canada, 1997 Calendar Year*
- Canada. Statistics Canada. 2002. *Canada's ethnocultural portrait: The changing mosaic, 2001 Census*. Catalogue No.: 96F0030XIE2001008
- Statistics Canada. 2001 Census: *Proportion of foreign-born population, provinces and territories*.
- Canada. Statistics Canada. 2002. *Profile of the Canadian Population by age and sex: Canada ages, 2001 Census* (Analysis Series, 2001 Census). Catalogue No.: 96F0030XIE2001002
- Statistics Canada. 2001 Census: *Age and sex profiles: Provinces and Territories*
- Statistics Canada. 2001 Census: *Profile of the Canadian Population by age and sex: Age shifts in the Canadian Population*
- Statistics Canada. 2001 Census: *Selected age distribution indexes, Canada, provinces and territories, 2001*
- Canada. Statistics Canada. 2004. *National Tourism Indicators: Third Quarter, 2003*. The Daily: January 9, 2004.
- Canadian Tourism Commission. *Tourism*, Volume 7, Issue 6 (July-August 2003). *Canadian Tourism Facts and Figures 2002*, Canadian Tourism Commission. 2002.
- Glynn, Tony, Manager, Market Research, Canadian Tourism Commission. Personal e-mail explaining tourism multipliers. January 23, 2004
- Marier, Joël, National Executive Director, Hostelling International – Canada. Personal interview, December 9, 2003.
- Palmer, Michael, Executive Director, The Student and Youth Travel Association of North America. Telephone interview, December 10, 2003.
- Smith, David, Director, Student Work Abroad Programme, Travel Cuts, Canadian Federation of Students. Telephone interview, February 27, 2004.
- SYTA Active Canadian Members Survey: 2004* (In progress – statistics quoted are based on data collected as of February 2004). The Student and Youth Travel Association of North America (SYTA). 2004.

SYTA Active Canadian Members Survey: 2003. The Student and Youth Travel Association of North America (SYTA). 2003.

Today's Youth Travellers: Tomorrow's Global Nomads. Edited by Greg Richards and Julie Wilson. Netherlands: International Student Travel Confederation (ISTC). 2003.

Travel and Tourism - A World of Opportunity, Executive Summary of "*The 2003 Travel and Tourism Economic Research.*" London: World Travel and Tourism Council (WTTC), 2003.

United States. US Census Bureau. 1998. *World Population Profile: 1998-Highlights.*

United States. US Census Bureau. 2001. *Age: 2000 (Census 200 Brief).* Catalogue No.: C2KBR/01-12.

Census 2000: *Percent Change by Age in United States Population*

World Tourism Organization. "*Youth outbound travel from three major European generating markets,*" News Release: (Madrid) February 8, 2003.

World Tourism Organization. 2001. "*World's Top 15 Tourism Destinations.*" Posted on the Canadian Tourism Commission Web Site, 2003: "Canada's Position as a Tourism Destination." (www.canadatourism.com/en...displaypage.cfm?folder=5&file=TourismDestination.htm).

World Travel and Tourism Council. "*The Emerging Economies Will Be Our Bread and Butter,*" News Release: January 14, 2004.

WTO Tourism Highlights 2003. World Tourism Organization. 2003.

Youth Tourism in Canada: The demand and the Challenge. Seminar Proceedings, Toronto, April 30, 2001, International Bureau of Social Tourism (BITS-Americas).

Youth Tourism Situation Analysis: Database. Urban and Tourism Studies Department, École des Sciences de la gestion, Université du Québec à Montréal. December, 2002

Youth Tourism Situation Analysis: Leading Countries Analysis. Urban and Tourism Studies Department, École des Sciences de la gestion, Université du Québec à Montréal. January, 2003.

Appendix A

The Youth Tourism Consortium of Canada *Partner Application*

Partner Information:

Company _____
Contact Name _____
(circle one) Mr. Ms. Mrs. Dr. Other: _____
Title _____
Address _____
City _____
Province _____ Postal Code _____
Telephone _____ Ext. _____
General 800# _____
Fax _____
E-mail _____
Web site _____

Company Information:

Please provide a short description of your organization (25 words or less) to be used in a Consortium Directory: _____

Consortium Overview:

The mission of the Youth Tourism Consortium of Canada is to get the youth of Canada and the world to visit Canada. It is dedicated to creating research on youth tourism; to encourage and support others in conducting research in youth tourism; to establish links with strategic research partners and to facilitate the growth of youth tourism in Canada by disseminating youth tourism information.

Signature _____ Date _____

Please make checks payable to “Hostelling International-Canada” and forward payment with this application to:



The Youth Tourism Consortium of Canada
c/o Hostelling International-Canada
205 Catherine Street, Suite #400
Ottawa, Ontario K2P 1C3

For more information, please contact:

Joël Marier, Consortium Chair

Phone: 613-237-7884 x23 Fax: 613-237-7868 E-mail: Joel.Marier@hihostels.ca