

# Student Travel

BUSINESS BAROMETER



ANNUAL  
REPORT  
2022

BONARD

## About us

**SYTA** is the non-profit, international, professional trade association that promotes student and youth travel and seeks to foster integrity and professionalism among student and youth travel service providers.

If you would like to learn more about SYTA, its programs, certifications, and its advocacy for safe and professional

group student travel or get more information about membership, please visit [www.syta.org](http://www.syta.org).

For news and important information on student and youth travel follow SYTA on



**BONARD** is an independent market research provider with 15 years of experience in the student travel industry. Leveraging evidence-based solutions, it assists governments, destinations, and individual providers to create bespoke strategies and policies. The company is a United Nations World Tourism Organization (UNWTO) Affiliate Member as well as a member of ESOMAR World Research.

To find out more about BONARD, please visit [www.bonard.com](http://www.bonard.com) or connect with us on



For more information about the Barometer, please contact us at: [ivana.slobodnikova@bonard.com](mailto:ivana.slobodnikova@bonard.com).

## BONARD

## Foreword

2022 was a much-awaited year of recovery for the student group travel industry. Our newest Student Travel Business Barometer shows that after a painful period of business decline beginning in 2020, we are working our way closer to pre-Pandemic levels of growth and have significantly surpassed 2021 numbers.

As you will see in the following report, our 2022 Business Barometer is providing the much-needed historical data on growth of student group travel, and forecasts of future business trends. This is in keeping with our mission to be the definitive source of up-to-date data on the student group travel industry and to assist our members and partners to achieve data-driven strategies to build their businesses.

This year, we have made some changes to continue to make our data deeper, wider and more “user friendly.” We want to thank our industry partners, ABA and NTA for their members’ participation this year, which has given us a deeper look into transportation data from their members who serve the student travel market. And we are grateful to our friends in Australia for providing the data needed to create a new country profile to add to our report.

We have changed some nomenclature – we now refer to “in-country” travel as all trips worldwide that take place within one country. Previously, we referred to this as “Domestic” travel. This change reflects our widening worldwide data collection.

We also have reached out to tour operators in various regions to interview them in greater depth and strengthen our analysis for the report. Their views on the 2022 data as well as the rapid changes in the market since the survey was taken earlier this year have been very helpful.

Speaking of rapid change, we understand that some of the forecasts in this Barometer may seem conservative to some of our readers. The pace of change and accelerated recovery has been so great in the first quarter of 2023 that many of our members have become even more optimistic than we were in January and February of this year.

Nonetheless, the data included in this report continues to provide consistent reporting and forecasting to help you predict change for your business and to help us advocate for our significant position in the worldwide travel industry.

We want to thank all of our members, allied members and international operators who participated in this year’s survey and helped us achieve the largest number of participants to date. And our thanks go to the members of the Research Committee for their engagement in shaping and improving this year’s Barometer.

As always, we welcome your feedback, and trust that you will find this reliable and consistent business intelligence useful for your continued growth and success.



**Carylann Assante, CAE**  
Chief Executive Officer  
SYTA and the SYTA Youth  
Foundation

*Carylann Assante*



Across the globe, sector associations, travel organisations, suppliers and other stakeholders are working together to remove any remaining barriers to travel and ensure that travel experiences for students are rewarding, accessible and safe.

As demonstrated by previous research, there is a clear understanding of the role of travel as a facilitator of personal development. Considering the benefits travel provides to students, there is a strong foundation for student group travel not only to return to but actually outgrow pre-pandemic levels.

Over the past years, the Student Travel Business Barometer has become the industry's go-to source for annual market performance statistics. Thanks to this, we are able to offer a reliable measure of the pace of recovery as well as indicate where the industry is headed.

Survey participation hit a record high this year, which is testament to the growing demand for consistent reporting worldwide.

We are particularly pleased to be introducing a new country profile on Australia, which details how tour operators down under fared in 2022 as well as how they compare with their peers in the USA and Canada. SYTA and BONARD are committed to continue gradually widening the pool of countries represented in this 'deep dive' section.

At the same time, this research initiative has broadened to cover areas of emerging importance. We continually adjust the Barometer to report on new realities, provide additional perspectives and interpret performance data in the context of broader industry developments. We believe that this year's edition serves as a valuable industry benchmark for student group travel worldwide.

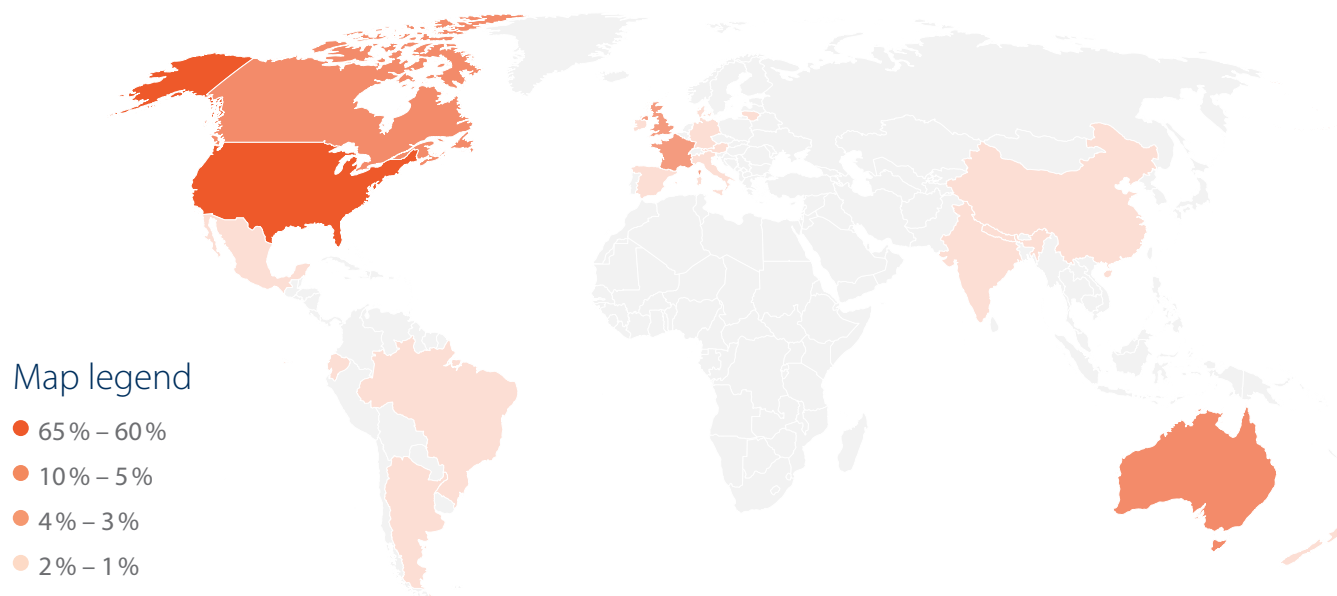


**Patrik Pavlacic MRICS**

*Chief Intelligence Officer*  
BONARD

# Introduction

IN 2022, THE BAROMETER SURVEYED **A RECORD HIGH SAMPLE OF 140 TOUR OPERATORS AND TRAVEL AND EDUCATION AGENCIES FROM 22 COUNTRIES WORLDWIDE**



## 13%

OF TOUR OPERATORS  
ORGANIZED **IN-COUNTRY**  
TRIPS



## 34%

OF TOUR OPERATORS  
ORGANIZED  
**OUT-OF-COUNTRY TRIPS**



## 54%

OF TOUR OPERATORS  
ORGANIZED **BOTH**  
**IN-COUNTRY AND**  
**OUT-OF-COUNTRY TRIPS**

- **In-country travel** refers to any trip conducted within the students' own country.
- **Out-of-country travel** refers to any trip which includes traveling from one country to another.

### Student group travel

was defined as student tours composed of at least two people aged 10–18, traveling out of their everyday environment on the same dates and following the same itinerary.

Research was carried out by an online survey conducted between December 2022 and February 2023.

# Executive Summary

## In-country travel



### 354,000

STUDENTS TRAVELED  
IN-COUNTRY  
IN 2022



### +267%

MORE STUDENTS  
TRAVELED IN 2022  
COMPARED TO 2021



MORE  
THAN **10%**  
INCREASE IN PRICES  
WAS SEEN IN OVERALL  
TRIP COSTS

- In-country student group travel experienced a robust recovery in 2022, surpassing the expectations of tour operators. Whereas tour operators initially anticipated that over 295,000 students would embark on in-country trips, the actual number was 353,500, exceeding expectations by 20%.
- In-country travel reached 54% of its pre-pandemic volume in 2022. The recovery was primarily led by tour operators based in the U.S., where student groups resumed travel several months ahead of the rest of the world.
- Looking ahead to 2023, 47% of tour operators have optimistic expectations, aiming to achieve more than 80% of their pre-pandemic booking volume from 2019 and by 2025, 66% of respondents expect to reach their pre-pandemic volumes.
- Majority of tour operators saw prices increase by more than 10% over 2019 figures for in-country trips. Transportation, covering bus, train, and flight tickets, increased more than any other trip component, by more than 15%. The second largest increase was for accommodation.
- Prices are expected to climb for all trip components throughout 2023. Tour operators noted that price increases in the first quarter of 2023 were more significant than anticipated.
- The recovery of the student group travel sector was largely propelled by in-country travel in the USA, which reached 67% of its pre-pandemic volume in terms of student numbers in 2019. The actual number of students traveling surpassed the expectations of tour operators by 27%, a 65,000 more students on the road.

# Executive Summary

## Out-of-country travel



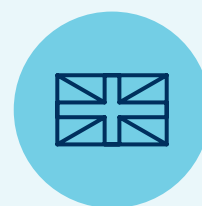
### 60,000

STUDENTS TRAVELED  
OUT-OF-COUNTRY  
IN 2022



### +198%

MORE STUDENTS  
TRAVELED IN 2022  
COMPARED TO 2021



### 24%

OF ALL STUDENTS  
TRAVELED TO THE UK,  
TOP DESTINATION IN 2022

- Tour operators predicted a substantial recovery in 2022 for out-of-country travel, estimating that around 59,000 students would travel abroad. As with in-country travel, the actual number of students traveling internationally in 2022 exceeded expectations, reaching 60,000. This represented a significant (198%) increase over the previous year.
- The UK became the leading destination, being chosen by 24% of customers in the student group travel sector. This popularity was primarily driven by both U.S.-based and Europe-based tour operators, a substantial number of whose customers chose the UK (21% and 52%, respectively).
- The USA, France, UK and Spain are expected to gain further popularity for out-of-country trips in 2023.
- As many as 57% of out-of-country trips took place as scheduled, a significant increase from 2021, when 9% of trips were executed as planned. As travel restrictions were lifted, a significant portion of out-of-country trips proceeded as planned, with minimal cancellations.
- A complete recovery in out-of-country travel may require a few more years. For 2023, 38% of respondents predict that more than 80% of the travel volume seen in 2019 will be reached, and a majority (70%) believe that it will take until 2025 to reach over 80% of the 2019 travel volume.
- For specific destinations, out-of-country travel has recovered much more slowly than in-country: Australia reached 36% of its pre-pandemic volumes, Canada 27%, and the USA 9%. A gradual rebound is expected to start in 2023.



## In-country travel

### Key performance indicators

In 2022, the industry saw a strong rebound in in-country student group travel – one that even exceeded tour operators' expectations.

**PARTICIPATING TOUR OPERATORS EXPECTED TO SEE MORE THAN 295,000 STUDENTS TRAVELING, BUT ENDED UP ORGANIZING IN-COUNTRY STUDENT GROUP TRAVEL FOR A TOTAL OF 354,000 STUDENTS – REALITY OUTPERFORMED EXPECTATIONS BY 20%.**

Three major factors that contributed to this were pent-up demand, postponements from the last two years as well as an increased number of last-minute bookings. Student groups also opted for in-country trips as there were restrictions still in place for out-of-country mobility.

**OVERALL, 267% MORE STUDENTS TRAVELED IN 2022 COMPARED TO 2021.**

With labor shortages in hospitality, attractions and in the motorcoach/public transportation industry, tour operators, suppliers and customers had to quickly adapt to the new reality as the sector changed over the last two years.

**WITH MORE THAN 557,200 STUDENTS EXPECTED TO TRAVEL IN 2023, IT IS CRUCIAL THAT THE INDUSTRY SHOULD PREPARE FOR A SUSTAINED AND INCREASED NUMBER OF TRAVELERS IN 2023 AND BEYOND.**

Booking trips and activities well in advance will also be an important strategy as the sector rebuilds its capacity post-pandemic. Armed with the lessons from 2022 and fueled by optimism, the industry could see its performance exceed expectations again in 2023.

It is prudent to look at where the sector stands compared to 2019.

**OVERALL, IN-COUNTRY TRAVEL REACHED 54% OF ITS 2019 VOLUME. THE RECOVERY WAS PREDOMINANTLY DRIVEN BY TOUR OPERATORS BASED IN THE U.S., WHERE STUDENT GROUPS STARTED TO TRAVEL AGAIN SEVERAL MONTHS BEFORE THE REST OF THE WORLD.**

Going into 2023, tour operators expect to reach 85% of their 2019 student numbers.

**THE AVERAGE TRIP DURATION IN 2022 WAS 5.9 DAYS, SLIGHTLY LONGER THAN IN 2019 (5.1 DAYS).**

The average trip duration for in-country trips has remained stable over the past four years with the exception of disruptions happening in 2020, when student trips were considerably shorter (3.8 days). This was mainly due to the fact that student groups moved only until March on short-term trips.

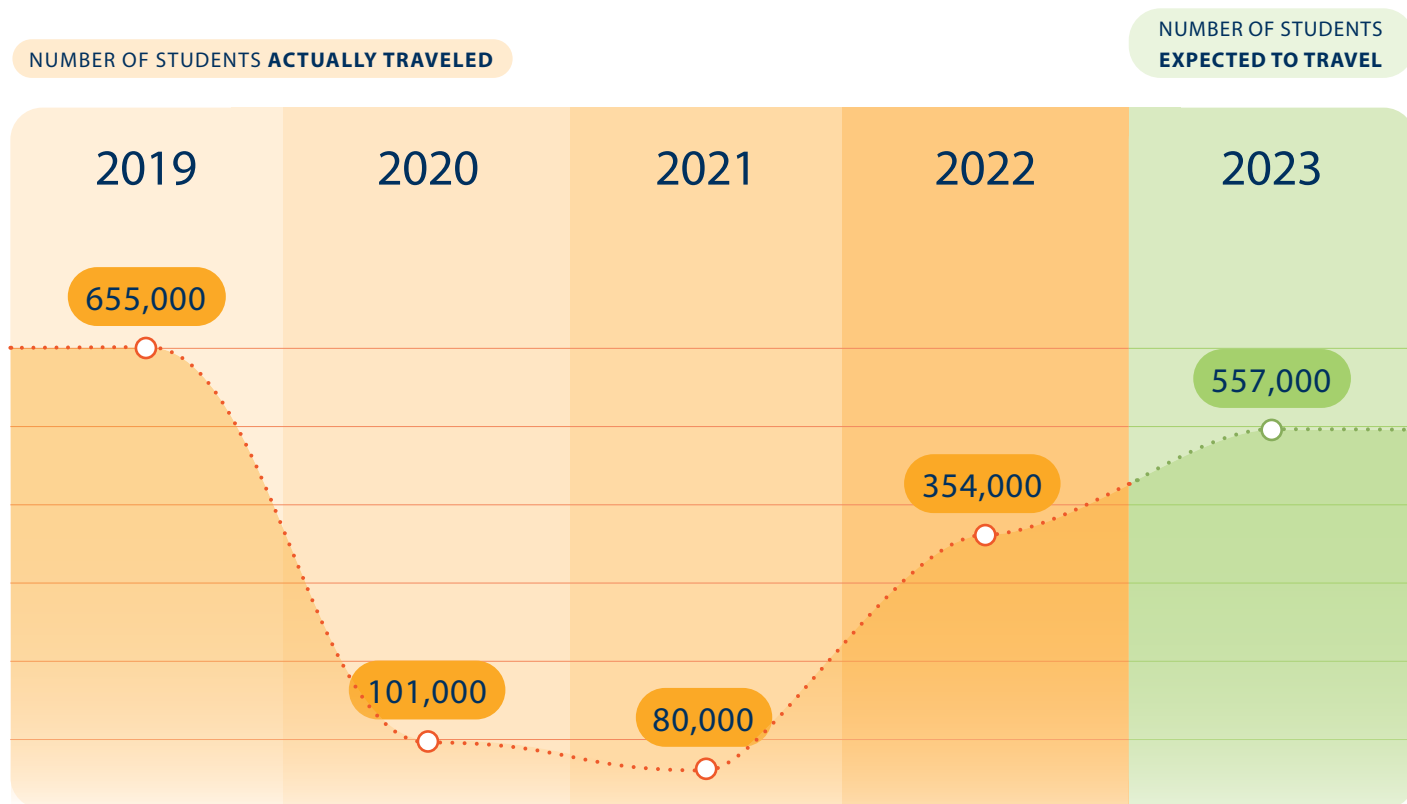
In 2022, the average student group size was 65 students. This was higher than in 2019 and 2021 (56 and 52 students respectively). The smallest group size was recorded in 2021, when the industry saw on average smaller groups traveling for a longer period of time (6 days on average).







## Number of students taking an in-country trip



Based on 86 STOs running in-country trips.

IN 2022 TOUR OPERATORS  
EXPECTED TO TRAVEL

**295,000**  
STUDENTS

ACTUALLY TRAVELED IN 2022

**354,000**  
STUDENTS



INCREASE IN THE NUMBER  
OF STUDENTS TRAVELING

**+267 %**

Year-on-year comparison  
2021 vs 2022

PARTICIPATING TOUR  
OPERATORS WERE  
EXPECTING MORE THAN  
295,000 STUDENTS TO  
TRAVEL, BUT ENDED UP

ORGANIZING IN-COUNTRY  
STUDENT GROUP TRAVEL  
FOR 354,000 STUDENTS –  
REALITY OUTPERFORMED  
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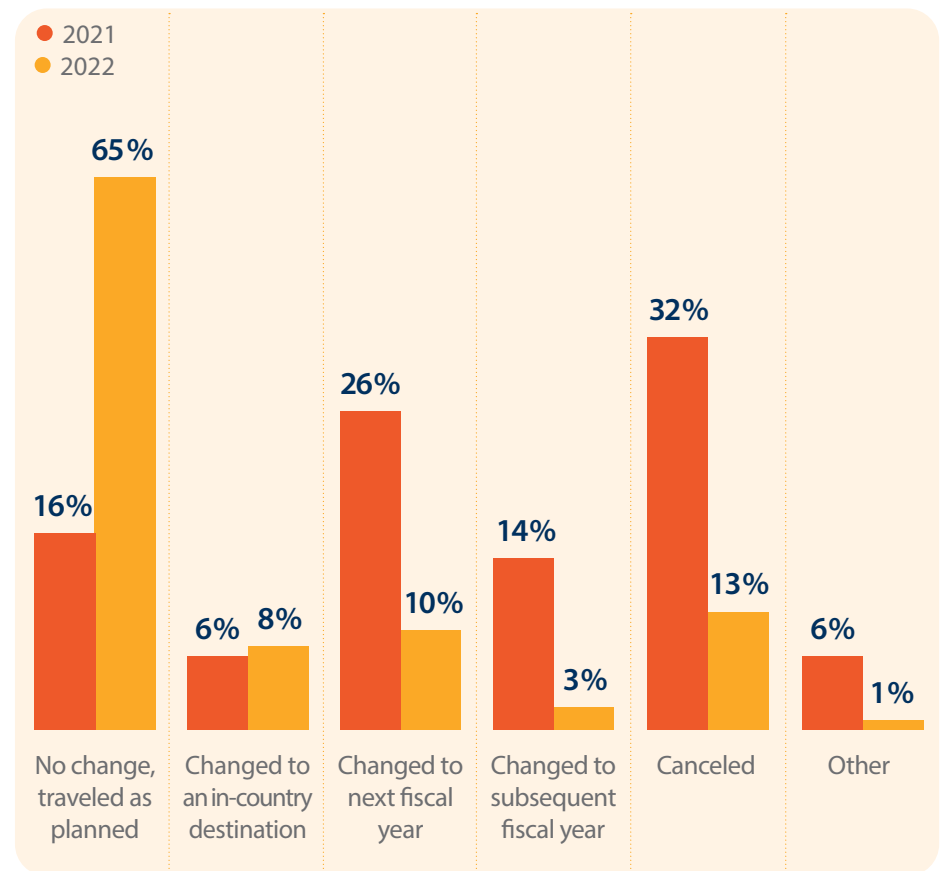
## Travel plans

### Change in customers' in-country travel plans

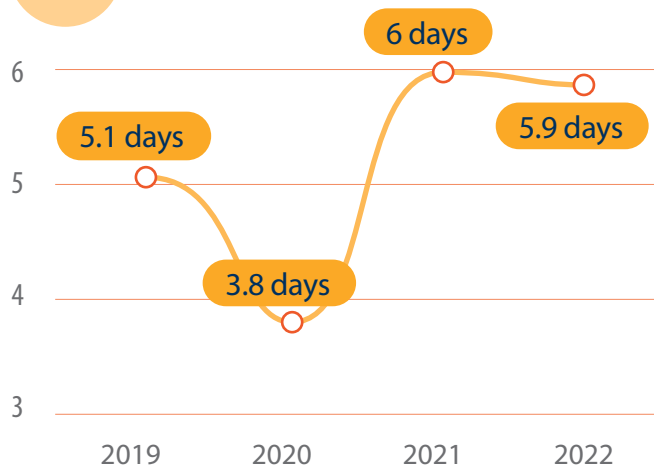
Sixty-five percent of student groups traveled in-country in 2022, which is a considerable improvement from 16% in 2021. Only 13% of in-country trips were canceled, compared to 32% in 2021.

An analysis of the student travel pipeline for 2023 shows that 10% are postponements from previous years and a further 3% of trips have been postponed to 2024. This represents a considerable change from 2021, when 30% of all in-country trips were postponed to next year.

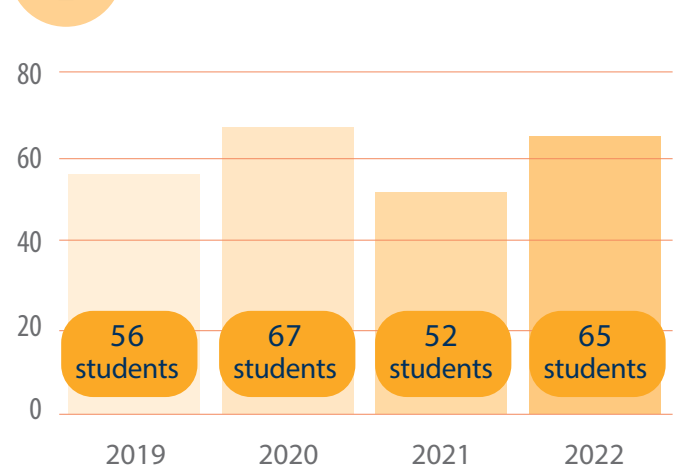
**THIS WAS A POSITIVE DEVELOPMENT FOR TOUR OPERATORS, AS THE TIME BETWEEN TRIP BOOKING AND PAYMENT WAS CONSIDERABLY SHORTER IN 2022 THAN IT WAS IN 2020 AND 2021.**



#### Average trip duration (days)



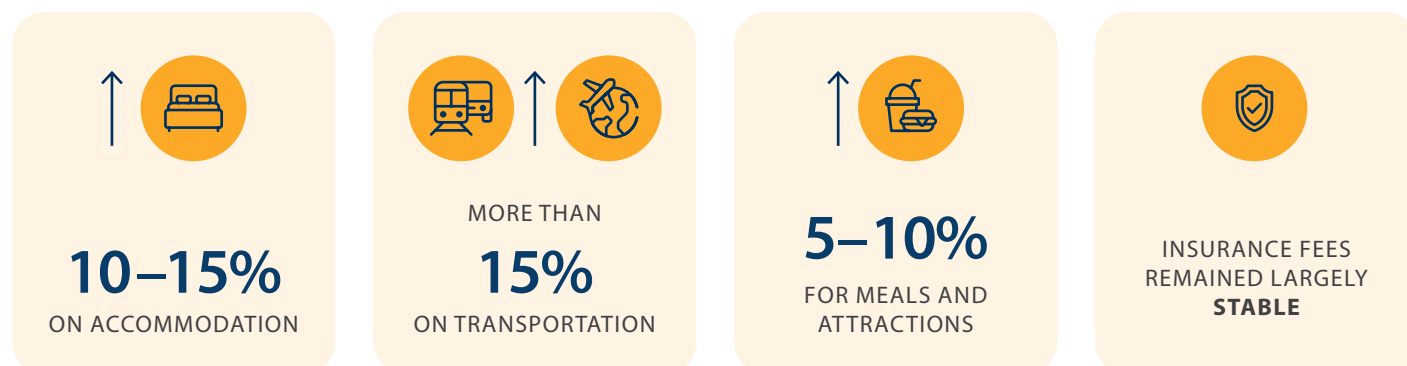
#### Average group size (students)





## Price trends

Overall, the majority of tour operators saw an increase in trip price of over 10%



In-country trip price and individual costs change in 2022 (comparing to 2019)

	DECREASED BY				No change	INCREASED BY			
	more than 15%	10–15%	5–9%	1–4%		1–4%	5–9%	10–15%	more than 15%
<b>Total trip cost</b>	2%	2%	0%	0%	5%	3%	22%	<b>39%</b>	26%
<b>Accommodation</b>	2%	1%	0%	0%	6%	6%	31%	<b>34%</b>	19%
<b>Admission fee</b>	1%	0%	4%	1%	14%	18%	28%	<b>29%</b>	5%
<b>Meals</b>	2%	0%	2%	1%	0%	12%	26%	<b>37%</b>	20%
<b>Insurance</b>	3%	0%	0%	0%	<b>29%</b>	24%	20%	18%	8%
<b>Air transportation</b>	3%	0%	0%	1%	8%	5%	19%	29%	<b>35%</b>
<b>Transportation by bus/train</b>	4%	0%	0%	1%	4%	4%	19%	24%	<b>45%</b>

**THE HIGHEST INCREASE – MORE THAN 15% – WAS NOTED FOR TRANSPORTATION. THIS WAS DRIVEN BY RISING COSTS FOR BUS, TRAIN AND FLIGHT TICKETS.**

The second biggest increase in prices for in-country trips was noted in the accommodation sector, where respondents reported an increase between 10-15%.

Meals and attractions are other categories where respondents report steep increases. The majority of tour

operators reported an increase of 5-10% for both, while 25% of respondents noted an even higher increase of more than 10%. Only insurance prices have kept stable or shown only modest increases.

**GOING INTO 2023, THE PRICES CONTINUED TO RISE ACROSS ALL TRIP COMPONENTS, INCLUDING INSURANCE. TOUR OPERATORS ALSO COMMENTED THAT PRICE INCREASES IN Q1 2023 WERE MUCH STEEPER THAN EXPECTED.**



## In-country trip funding

The research asked operators to indicate which funding sources were used for in-country trips and compared their responses to those reported in 2019.

The results show that the breakdown of funding sources remained substantially the same in 2022.

In 2019, 78% of the funding came from families, with the second-largest source being school budgets at 10%. The remaining funding came from crowdfunding (6%), with the rest coming from other sources (2%), grants (1%), PTA (1%) and small businesses or the community (2%).

In 2022, families contributed 77% of the total funding. School budgets accounted for 11% of the total, and crowdfunding for 5%. With the price increases,

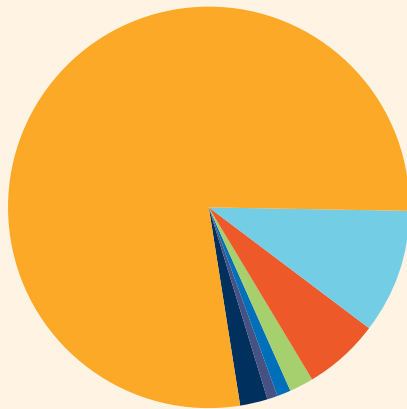
schools are also looking into more creative ways how to source funding for school trips, including further engagement with local communities or applying for grants schemes.

The majority of the funds still come from families, but fundraising is also employed by schools and students as a way to finance their trips.

During in-depth interviews, tour operators noted that funding sources for in-country trips were quite different in 2021.

Small businesses and communities contributed to the budgets more actively as there was a common understanding that school children should travel after the pandemic.

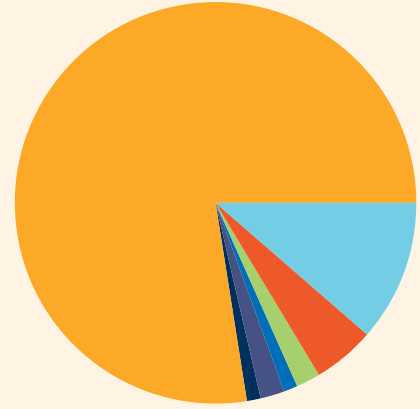
### 2019



**78% Family resources**

- 10%** School budgets
- 6%** Crowdfunding
- 2%** Other
- 1%** Grants
- 1%** PTA
- 2%** Small business/community
- 0%** Federal TRIO funding
- 0%** Trip destination

### 2022



**77% Family resources**

- 11%** School budgets
- 5%** Crowdfunding
- 2%** Other
- 1%** Grants
- 2%** PTA
- 1%** Small business/community
- 0%** Federal TRIO funding
- 0%** Trip destination





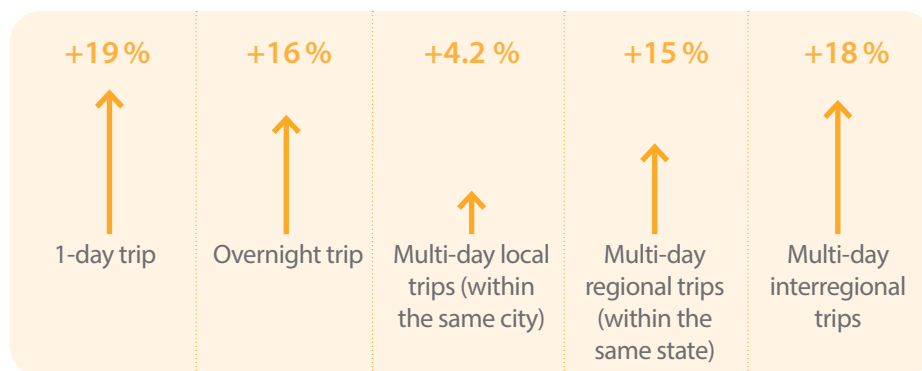
## Future demand

Expected change in demand for selected types of trips in 2023 compared to 2019

ACCORDING TO RESPONDENTS, MULTI-DAY TRIPS SHOULD SEE THEIR POPULARITY INCREASE SUBSTANTIALLY IN 2023.

Tour operators predict that demand for multi-day regional trips within the same state will increase by 14.8%, and demand for multi-day interstate trips and multi-day local trips within the same city by 18% and 4% respectively.

This is another sign that the industry is moving on from the pandemic

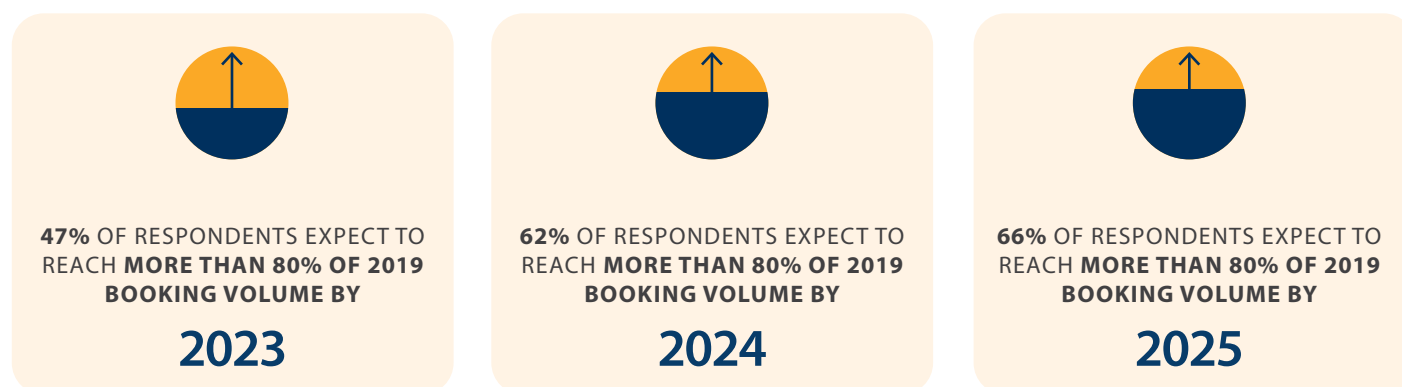


crisis. As student groups are back on the road again, tour operators expect to see longer trips (either in-state or

interregional) being booked, rather than one-day local trips.

## Market recovery forecast

Percentage of 2019 in-country trip bookings anticipated to recover in the following years



The research continues to provide a regular forecast based on tour operators' views of how the next three years will unfold.

Predictions point to a positive trajectory, with 47% of operators expecting to see more than 80% of their 2019 in-country trip bookings in 2023. For 2024, 62% of respondents expect to achieve 80%+ recovery and for 2025, the share grows to 66% of respondents.

At the same time, research unveiled there is a notable share of tour operators who do not expect to see any recovery because they contemplate changing their business focus or are already moving away from organizing in-country travel. As teachers became more independent in trip planning in 2021, they tended to organize local trips themselves. As a result, some tour operators shift their focus toward out-of-country travel or other market segments.



## Out-of-country travel

### Key performance indicators

In 2022, the number of student groups taking out-of-country trips recovered more slowly, primarily due to ongoing travel restrictions in certain destinations (e.g., the need to show a negative test upon arrival in the U.S.).

**SINCE OUT-OF-COUNTRY TRAVEL IS TYPICALLY PLANNED EARLIER THAN IN-COUNTRY TRAVEL, STUDENTS AND TEACHERS CHOSE TO TRAVEL WITHIN THEIR OWN COUNTRY INSTEAD OF VENTURING ABROAD.**

In addition, the availability and pricing of flight tickets played a significant role in influencing the decision to choose in-country travel. The limited availability of flights, coupled with the uncertainty surrounding travel regulations and possibility of last-minute changes, made out-of-country travel less accessible and potentially more expensive for student trips.

**WHILE THE GROWTH NOTED IN 2022 IS ENCOURAGING, IT IS IMPORTANT TO NOTE THAT THE SECTOR HAS ONLY RECOVERED APPROXIMATELY 22% OF ITS 2019 PRE-PANDEMIC VOLUME.**

In 2021, with minimal to no activity taking place due to the pandemic, student groups traveling out-of-country were scarce. However, tour operators

anticipated a significant rebound in 2022, projecting that approximately 59,000 students would embark on out-of-country trips.

**SURPRISINGLY, THE ACTUAL NUMBER OF STUDENTS TRAVELING ABROAD IN 2022 SURPASSED EXPECTATIONS AT 60,000, WHICH MARKED A 198% INCREASE OVER 2021.**

Several destinations emerged as popular for international student group travel in 2022, with the UK, U.S., France, and Canada standing out in particular.

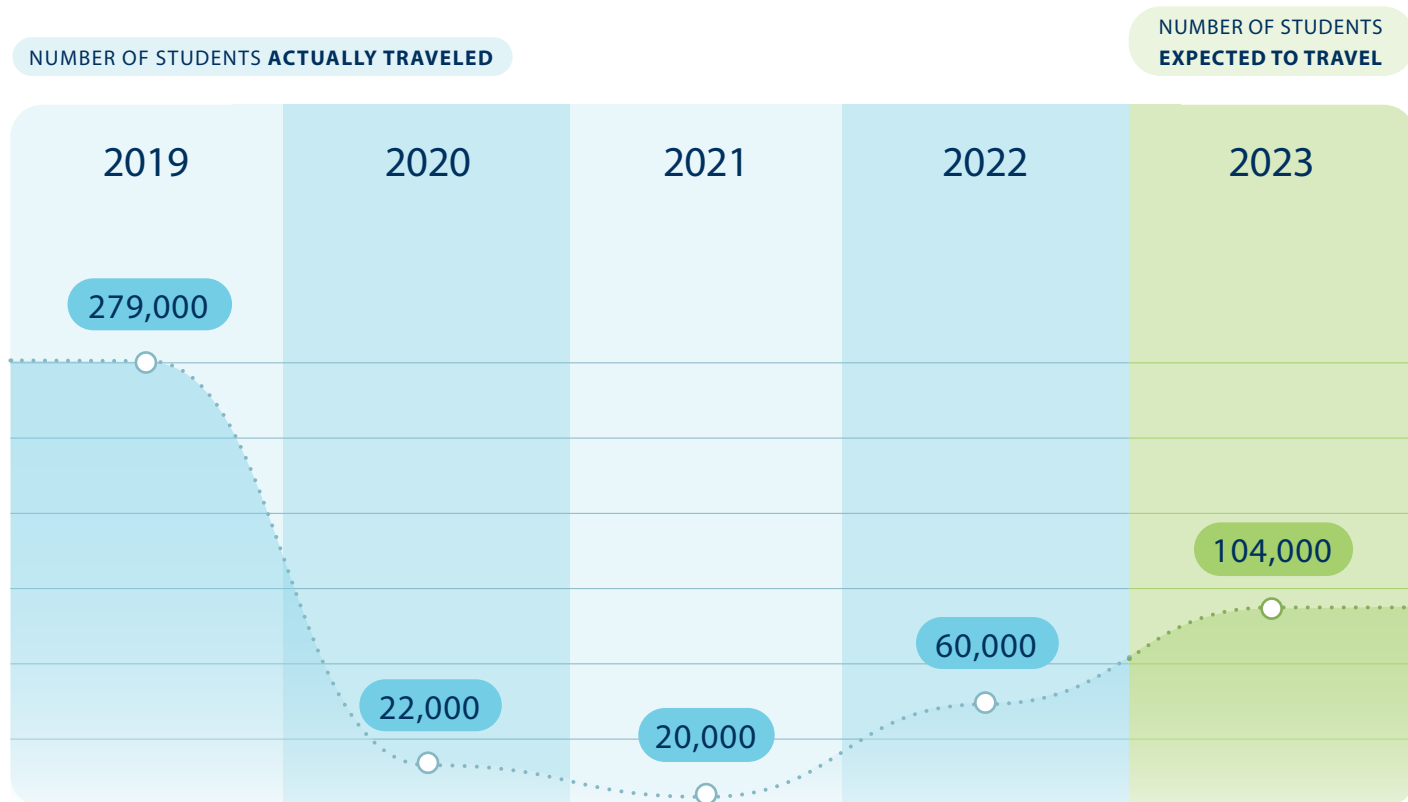
Of these destinations, the UK held the top position, being most popular among both U.S.-based and European-based tour operators.

**LOOKING AHEAD INTO 2023, TOUR OPERATORS ARE EXPECTING MORE THAN 104,000 STUDENTS TO TRAVEL TO INTERNATIONAL DESTINATIONS, WHICH WOULD REPRESENT ABOUT ONE THIRD OF PRE-PANDEMIC VOLUMES.**

As regards key trip attributes, the average trip duration was lower than in 2021 – 9.7 days – but higher than the 8.1 days observed in 2019. Given the increase in transportation prices, groups opted to travel for longer.

The average group size was 25, compared to 32 in 2019, which was the smallest group size reported in the last four years.

## Number of students taking an out-of-country trip



Based on 55 STOs running out-of-country trips.

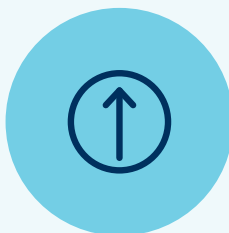
IN 2022 TOUR OPERATORS  
EXPECTED TO TRAVEL

**59,000**  
STUDENTS

ACTUALLY TRAVELED IN 2022

**60,000**  
STUDENTS

INCREASE IN THE NUMBER  
OF STUDENTS TRAVELING



**+198%**

Year-on-year comparison  
2021 vs 2022

WHILE THE GROWTH IS ENCOURAGING, IT IS IMPORTANT TO NOTE THAT THE SECTOR HAS ONLY RECOVERED APPROXIMATELY 22% OF ITS 2019 VOLUME.

THE OUTLOOK FOR 2023 IS RATHER POSITIVE AS THE TRAVEL RESTRICTIONS ARE NO LONGER IN PLACE.

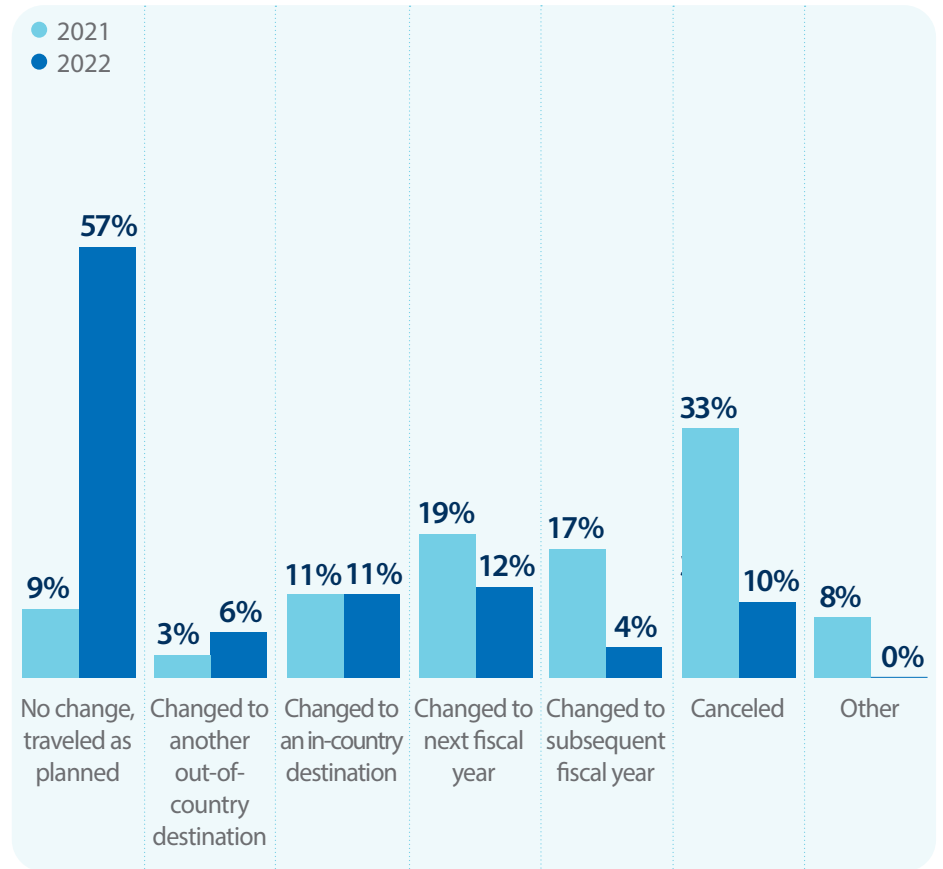
## Travel plans

### Change in customers' out-of-country travel plans

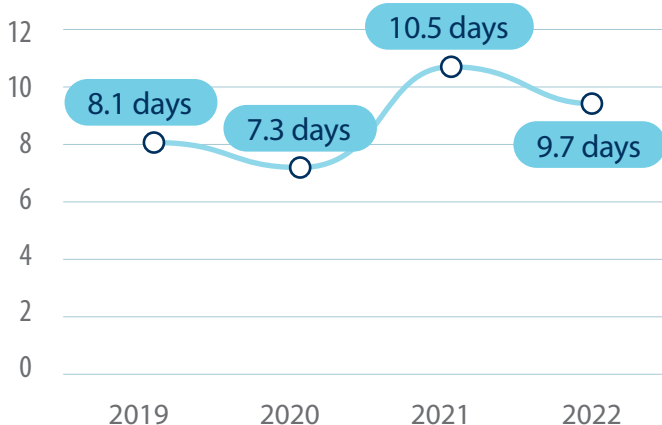
Out-of-country travel improved notably between 2021 and 2022. With travel restrictions lifted, a significant portion of out-of-country trips proceeded as planned without cancellations. In 2022, 57% of out-of-country trips took place as scheduled, compared to a mere 9% in 2021.

While most trips were able to proceed, some changes did have to be made. About 11% of the trips originally planned to be out-of-country were changed to in-country destinations, likely due to concerns or limitations still related to the pandemic aftermath. Additionally, 12% of the trips were postponed to 2023, and 4% were postponed to 2024.

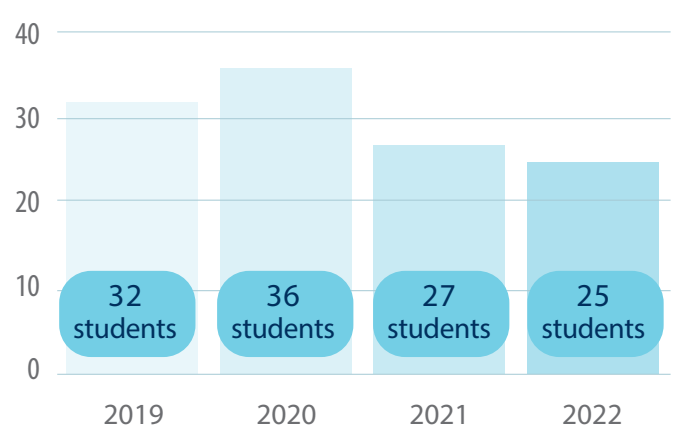
The cancellation rate also showed significant improvement. In 2022, 10% of trips were canceled, which is a notable decrease from the 33% cancellation rate observed in 2021.



#### Average trip duration (days)



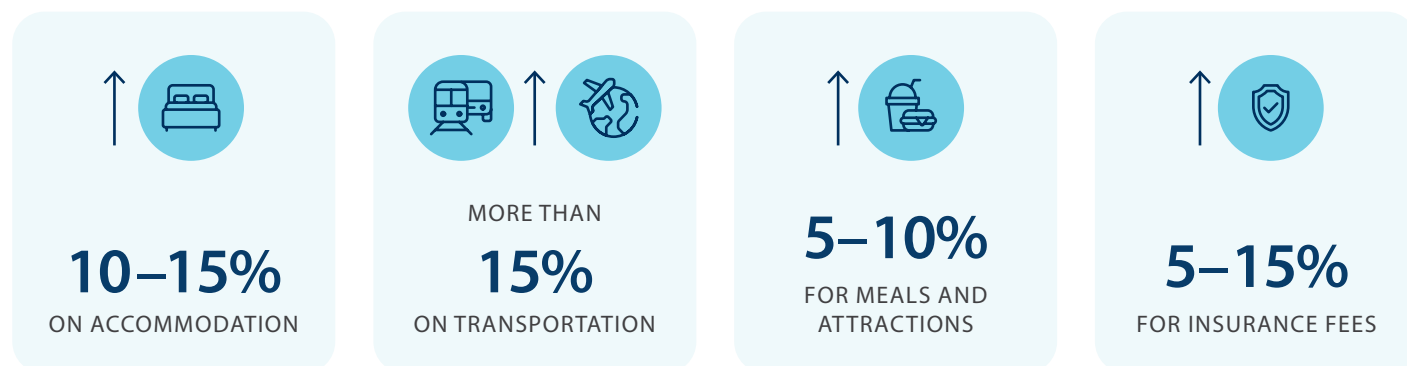
#### Average group size (students)





## Price trends

Tour operators saw following increases in trip prices:



Out-of-country trip price and individual costs change in 2022 (comparing to 2019)

	DECREASED BY				No change	INCREASED BY			
	more than 15%	10 – 15%	5 – 9%	1 – 4%		1 – 4%	5 – 9%	10 – 15%	more than 15%
Total trip cost	2%	2%	0%	0%	2%	6%	17%	<b>42%</b>	29%
Accommodation	2%	2%	2%	0%	4%	13%	23%	<b>40%</b>	15%
Admission fee	0%	2%	4%	0%	21%	21%	<b>27%</b>	23%	2%
Meals	2%	2%	4%	0%	2%	13%	<b>44%</b>	29%	4%
Insurance	2%	2%	2%	0%	17%	13%	<b>31%</b>	21%	13%
Air transportation	2%	2%	2%	0%	4%	2%	6%	34%	<b>47%</b>
Transportation by bus/train	2%	0%	6%	0%	2%	6%	15%	31%	<b>38%</b>

IN THE OUT-OF-COUNTRY TRAVEL SECTOR, RESPONDENTS NOTED A SIGNIFICANT RISE IN TOTAL TRIP COSTS OF OVER 10%. THIS ESCALATION WAS PRIMARILY DRIVEN BY TRANSPORTATION EXPENSES, PARTICULARLY AIR TRAVEL.

Almost half of the respondents (47%) reported that flight prices had risen by more than 15%, while 38% saw the same level of increase in bus or train transportation costs.

In other expense categories, a majority saw price had increases of between 5% and 15% in accommodation, attractions, activities,

and other miscellaneous costs. Meal prices increased by less than the rises seen in the in-country sector, with most respondents reporting an increase of between 5% and 9%.

However, insurance costs exhibited greater volatility than in-country travel, with a majority of respondents (52%) indicating a rise of 5% to 15%.

## Destination preference

Share of customers traveling to selected destinations

**IN 2022, THE UK EMERGED AS THE MOST POPULAR DESTINATION, ATTRACTING 24% OF CUSTOMERS FOR STUDENT GROUP TRAVEL.**

**AMONG U.S.-BASED TOUR OPERATORS, 21% OF CUSTOMERS OPTED TO TRAVEL TO THE UK, WHILE THE FIGURE FOR EUROPE-BASED TOUR OPERATORS WAS 52%.**

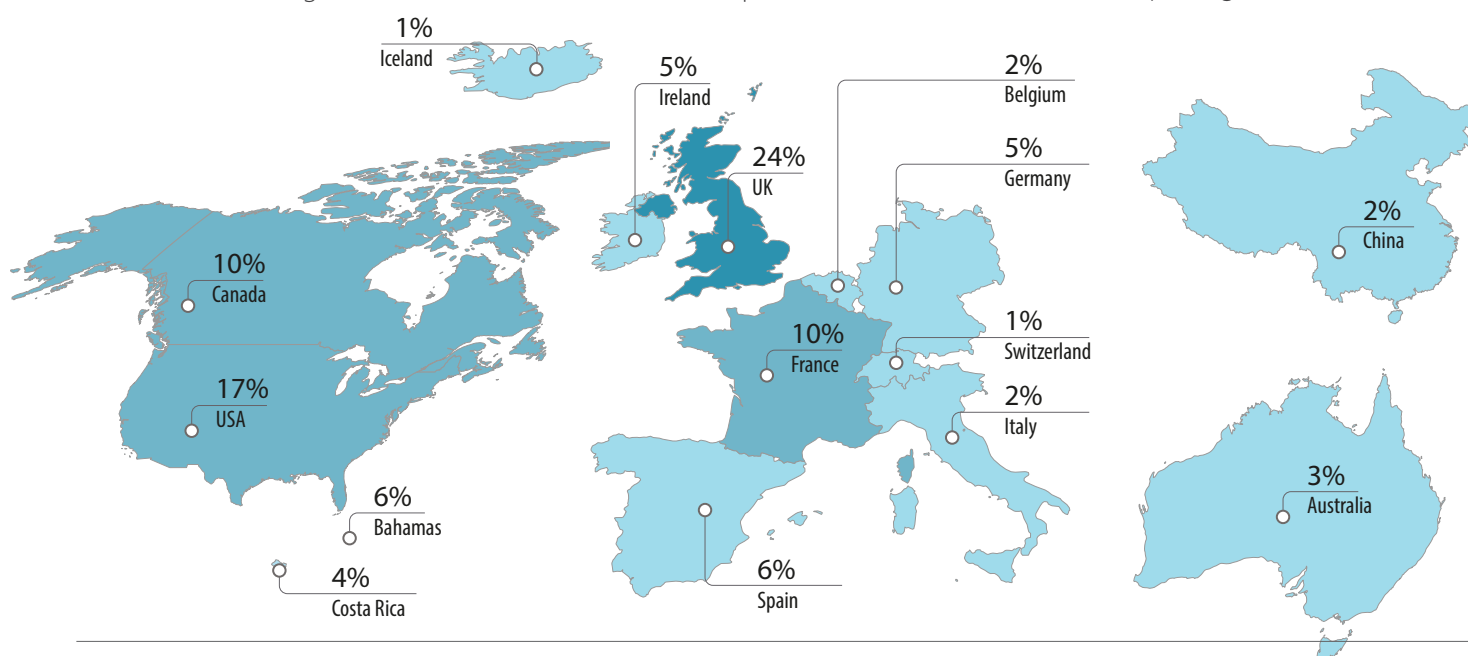
This preference for the UK was primarily driven by U.S.-based and Europe-based tour operators, who both saw a significant number of customers choosing this destination.

The second most popular destination for student travel was the USA, attracting 17% of customers, driven by student groups traveling with Canadian tour operators. Close behind

were Canada and France, which both received 10% of student travelers.

On the other hand, some destinations saw their popularity fall. Unsurprisingly due to its continued closure to visitors, China only attracted 2% of customers in 2022, reflecting a decline over 2021.

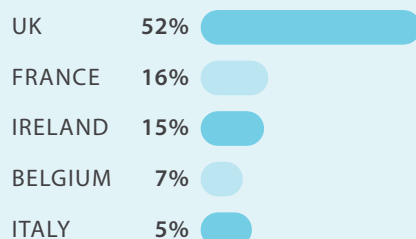
Various factors may have contributed to this decrease, including ongoing travel restrictions, concerns related to the pandemic, and potential geopolitical factors impacting travel decisions.



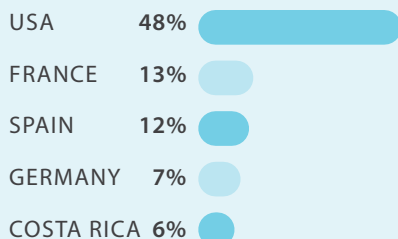
Share of customer traveling to top 5 destinations



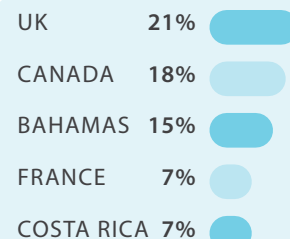
### EUROPE-BASED TOUR OPERATORS



### CANADA-BASED TOUR OPERATORS

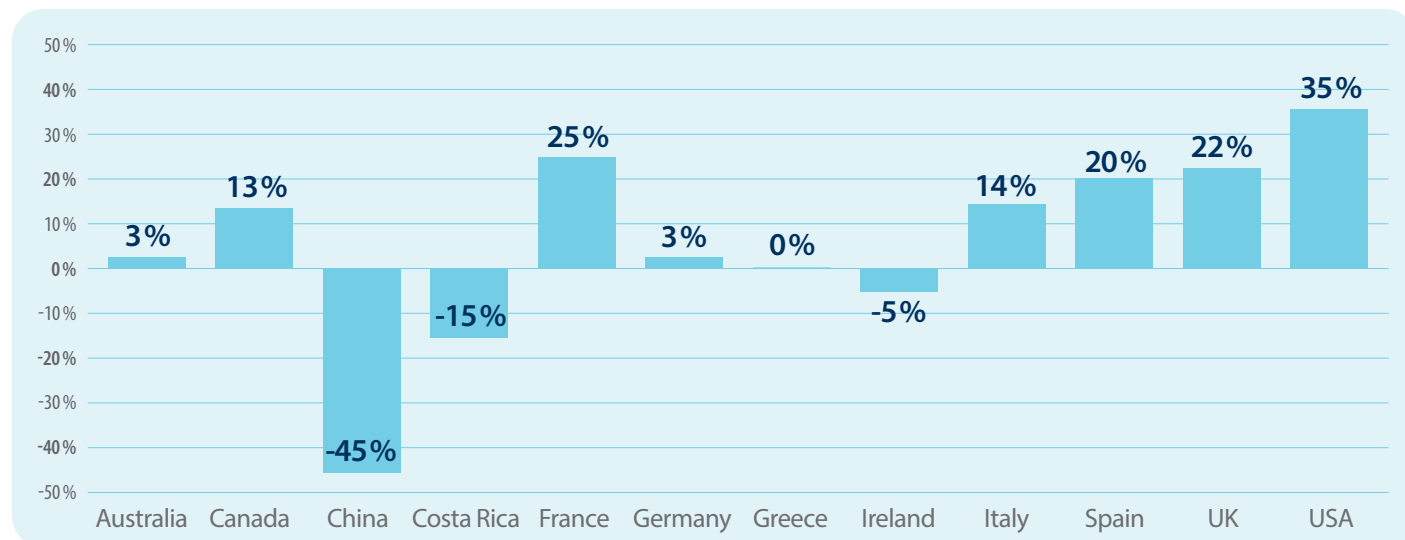


### U.S.-BASED TOUR OPERATORS



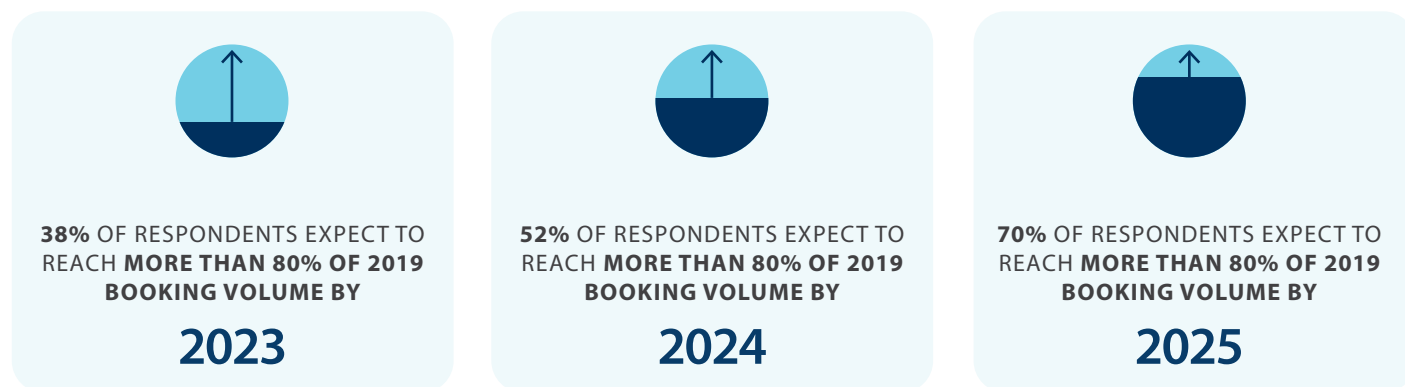
## Expected student group travel demand for 2023

for the following out-of-country student travel destinations compared to 2019



## Market recovery forecast

Percentage of 2019 out-of-country trip bookings anticipated to recover in the following years



It is anticipated that out-of-country travel will recover more slowly in the next three years than in-country travel. Expectations of survey respondents for reaching pre-pandemic volumes of out-of-country travel are as follows:

For 2023, 38% of respondents anticipate that more than 80% of

the travel volume seen in 2019 will be achieved. The increase in out-of-country travel will continue steadily, with 52% of respondents predicting that more than 80% of the 2019 travel volume will be reached in 2024.

However, it is important to note that a majority of respondents (70%)

expect that over 80% of 2019 travel volume will only be achieved by 2025.

This implies that the complete recovery of out-of-country travel may take a few more years, reflecting the cautious approach and uncertainties surrounding it in the post-pandemic landscape.



## Transportation

The 2022 Barometer included a series of questions regarding transportation preferences, specifically related to Motorcoaches.

### THIRD PARTY GROUND OPERATORS

ACCORDING TO THE RESULTS, ONLY 24% OF TOUR OPERATORS CONSISTENTLY WORK WITH A THIRD PARTY TO BOOK MOTORCOACHES FOR THEIR GROUPS. 60% SAID THEY DO NOT AND 17% SAID THEY WORK WITH A THIRD PARTY SOMETIMES.

### OVERNIGHT TRIPS BY MOTORCOACH

OF THE PARTICIPATING TOUR OPERATORS, 52% SAID THEY DO NOT BOOK MOTORCOACHES FOR OVERNIGHT TRIPS WHICH IMPLIES THEY USE AIR TRANSPORTATION FOR OVERNIGHT AND MULTI-DAY TRIPS.

WHILE 69% OF THE TOUR OPERATORS BOOK MOTORCOACHES FOR DAY TRIPS, A SMALL PERCENTAGE (TWO IN TEN) SAID THEY DO NOT BOOK DAY TRIPS.

### MOTORCOACH/DRIVER PREFERENCES OR REQUIREMENTS

Most of the tour operators also report that student groups do not have preferences or requirements regarding the motorcoach company, or driver selected for the trip.

Asked whether student groups require a motorcoach company from their preferred vendor list, 47% of operators said no, while 29% said it happens sometimes. They also reported that school groups are not asking for a sustainability or green policy when selecting a motorcoach with 75% of operators reporting that groups do not ask for this feature and only 9% reporting that they do.

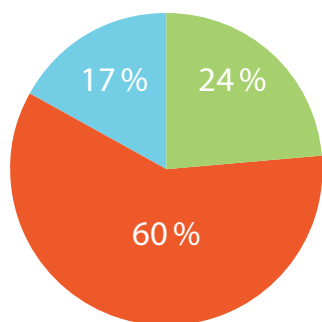
When asked about availability of seatbelts, 38% of operators report that student groups explicitly request motorcoaches with seatbelts, while 22% said it happens sometimes.

In the area of health and safety, Covid-19 pandemic related requirements no longer dominate student travel. Almost two in three operators (64%) said that student groups do not request that drivers be vaccinated or wear a mask, although 31% reported that this happens sometimes. A minority of respondents (5%) said that student groups request drivers that are vaccinated and wear masks.

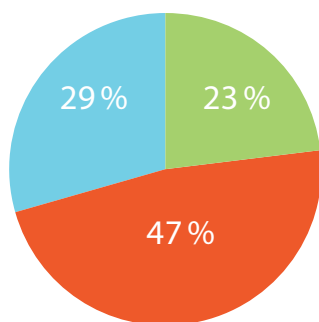




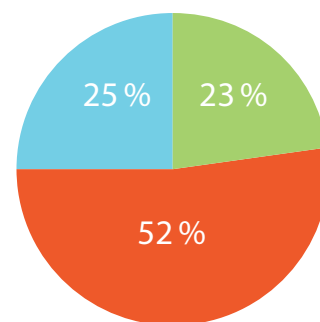
Do you work with a third-party ground operator who books motorcoaches for your groups?



Do your student groups ask that you use a motorcoach company from their preferred vendor list?

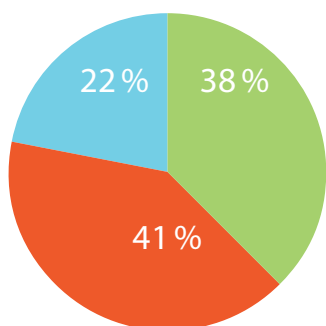


Do you book motorcoaches that will drive through the night for overnight trips?

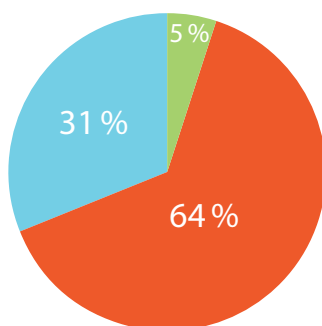


● Yes ● No ● Sometimes

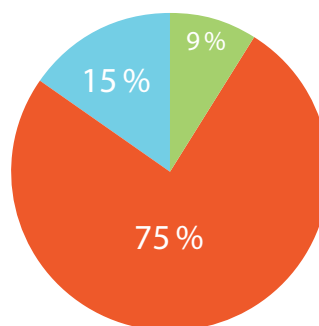
Do your student groups request motorcoaches with seat belts?



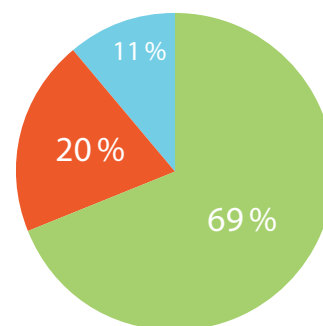
Do your student groups ask that drivers be vaccinated or wear a mask?



Do your student groups ask if the motorcoach company has a sustainability or green policy?



Do you book motorcoaches for day trips?





## COUNTRY PROFILE

# Australia

In 2022, developments in Australia were still significantly impacted by the border closure in 2020 and 2021; consequently, student group travel reached only approximately 50% of its pre-pandemic volume.

In terms of in-country travel, slightly fewer students (12,400) traveled within Australia than the expected number (13,800). However, expectations for 2023 are optimistic, with operators projecting a substantial increase to 20,100 students.

Regarding travel plans in 2022, a majority of trips (65%) proceeded as scheduled, while only 13% were canceled. Approximately 7% of trips were changed to domestic destinations, and 13% were postponed, with 10% deferred to 2023 and 3% to 2024.

Notable trends in 2022 included students traveling for longer (5.5

days compared to 3.2 days in 2021) and in larger groups (65 students compared to 40 in 2021).

In terms of destinations, Cairns and North Queensland, as well as ski resorts, attracted the highest share of customers, with 20% and 19% respectively. Other popular destinations included Canberra (17%) and South Australia (18%).

The out-of-country sector in Australia is still slightly lagging behind the domestic sector in terms of recovery. In 2022, a total of 10,600 students traveled internationally, falling short of the expected number of 12,100, indicating that the sector has only recovered approximately 36% of its 2019 numbers.

Among those who traveled internationally, close to 60% of customers made no change to their plans, while 11% switched

to domestic destinations and 12% postponed their trips to 2023. The sector anticipates that a higher number of students (14,803) will travel internationally in the current year.

On average, trips in 2022 were much longer than in 2020, with an average duration of 8.3 days as compared to 3.7 days. The size of student groups has significantly decreased, with an average of 25 students per group compared to 62 in 2020.

These observations reflect the ongoing challenges to and recovery process of the student travel sector in Australia, with in-country travel showing more promising signs than out-of-country travel. As border restrictions ease and conditions improve, it is expected that the sector will gradually continue its recovery in the coming years.

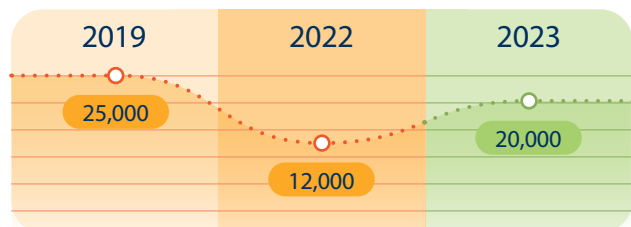


## In-country travel

NUMBER OF STUDENTS

ACTUALLY TRAVELED

EXPECTED TO TRAVEL



### Year-on-year comparison



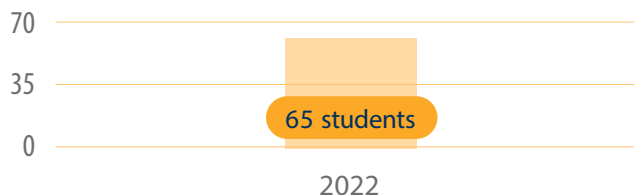
**-50 %**

2019 vs 2022

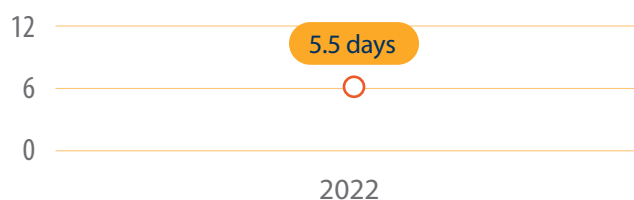
Based on 11 STOs running in-country trips.



### Average group size (students)



### Average trip duration (days)



### Share of customers traveled to the following destinations

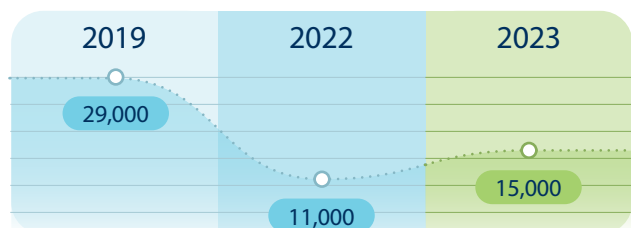
Cairns/North QLD	20%	Canberra	17%	Victoria (excl ski resorts)	7%	Western Australia	1%
Australian Ski Resorts	19%	NSW	9%	Tasmania	3%	SE QLD	0%
South Australia	18%	Northern Territory	7%	QLD Outback	1%		

## Out-of-country travel

NUMBER OF STUDENTS

ACTUALLY TRAVELED

EXPECTED TO TRAVEL



### Year-on-year comparison



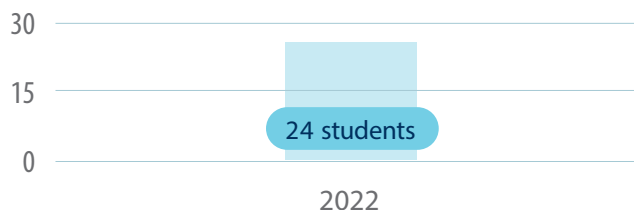
**-64 %**

2019 vs 2022

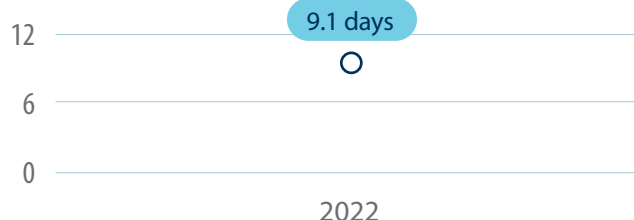
Based on 11 STOs running in-country trips.



### Average group size (students)



### Average trip duration (days)







## COUNTRY PROFILE

# Canada

Most destinations, including Canada, started receiving travelers in late 2022. The in-country travel sector in Canada recovered about 14% of its pre-pandemic student numbers in 2022.

In 2021, over 31,200 students traveled, which was 12% lower than the sector's expectations. Nonetheless, this still indicates a significant recovery in the industry, with student numbers growing by an impressive 4,190% between 2021 and 2022.

Regarding travel plans in 2022, a majority of trips (65%) proceeded as scheduled, while only 13% were canceled. Approximately 7% of trips were changed to domestic destinations, and 13% were postponed, with 10% deferred to 2023 and 3% to 2024.

Operators are anticipating that 76,438 students will travel in 2023, reflecting the industry's optimistic outlook.

In terms of travel duration, students traveled for slightly longer periods in 2022 (5 days) than in 2020 (3.7 days). Additionally, student groups were much larger than in 2020, indicating a rebound in group travel (62 students in 2020 and 72 students in 2022).

The out-of-country sector fared slightly better than the in-country sector in Canada, recovering approximately 27% of pre-pandemic student numbers in 2022.

While the sector expected 16,700 students to travel last year, the actual total was 14,900, representing a remarkable growth of 29,784% over 2021.

In the out-of-country sector, a similar ratio of customers traveled as planned, while 10% canceled and 13% postponed their trips to 2023. An additional 11% changed their destination to domestic travel.

Operators expect 45,100 students to travel internationally in 2023.

On average, trips in 2022 (8.3 days) were considerably longer than in 2020 (6.4 days). Meanwhile, student groups shrank to an average 25 students (from 34 students in 2020), indicating a shift in travel dynamics.

These insights demonstrate the ongoing recovery of the student travel industry in Canada, with both the in-country and out-of-country sectors making progress. As travel conditions continue to improve, it is expected that the sector will start recovering even faster.

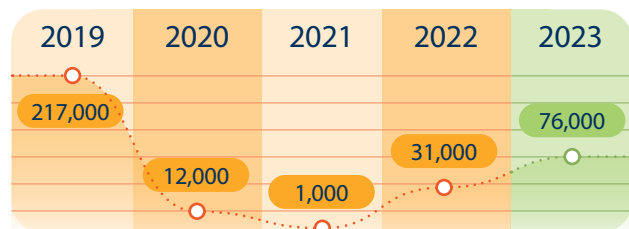


## In-country travel

NUMBER OF STUDENTS

ACTUALLY TRAVELED

EXPECTED TO TRAVEL



### Year-on-year comparison



+4,190 %

2021 vs 2022



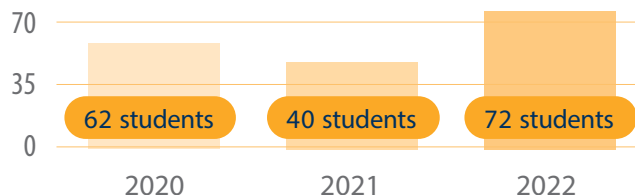
-86 %

2019 vs 2022

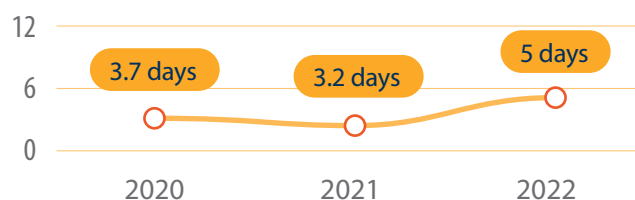
Based on 12 STOs running in-country trips.



### Average group size (students)



### Average trip duration (days)



### Share of customers who traveled to the following destinations

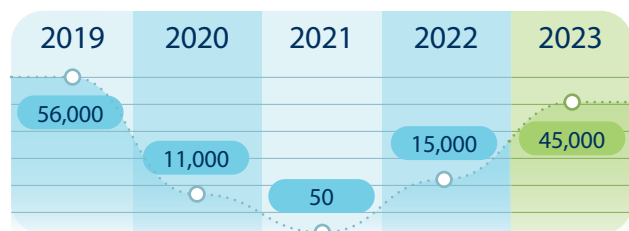
Toronto	27%	Quebec City	16%	Banff	0%	Whistler	0%
Niagara Falls	24%	Ottawa	9%	Charlottetown	0%		
Montreal	22%	Vancouver	2%	Winnipeg	0%		

## Out-of-country travel

NUMBER OF STUDENTS

ACTUALLY TRAVELED

EXPECTED TO TRAVEL



### Year-on-year comparison



+29,784 %

2021 vs 2022



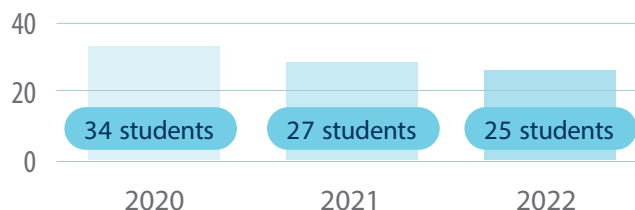
-73 %

2019 vs 2022

Based on 12 STOs running in-country trips.



### Average group size (students)



### Average trip duration (days)





## COUNTRY PROFILE

## USA

Student groups began traveling early in 2022, mainly taking domestic trips, which helped revive the sector. Student numbers in 2022 reached an impressive 76% of the volumes seen in 2019, contrasting with the trends observed in Canada and Australia.

Over 308,000 students traveled within the USA in 2022, surpassing the industry expectation of around 243,500 students. Compared to 2021, student numbers were up by a remarkable 330%.

Operators predict approximately 403,200 students will travel domestically in 2023, bringing the industry back to pre-pandemic levels.

In-country trips in 2022 were on average two days longer than in 2020

(3.9 days vs. 5.9 days). This was mainly due to the shorter trips that took place before March 2020, when mobility was halted. The average number of students per group was slightly lower in 2022 (65 students) than in 2020 (72 students).

Nearly two thirds of customers (65%) traveled as planned, while 13% canceled and 10% postponed their trips to 2023.

Out-of-country travel from the USA in 2022 showed a different picture than in-country travel, with significantly fewer students opting for international trips.

However, the actual number of students traveling abroad exceeded expectations. Initially, around 5,000

students were expected to travel, but almost 5,900 ended up doing so.

This could be attributed to the requirement for travelers to show a negative test upon arrival in the USA, which was still in place at the beginning of 2022.

A more pronounced revival of out-of-country travel is anticipated in 2023, when operators predict 13,300 students will travel outside of the USA. Out-of-country trips in 2022 were longer than in 2020, with an average duration of 9.7 days compared to 7.5 days in 2021.

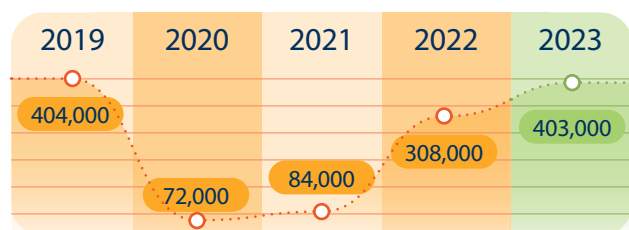
However, group sizes were considerably smaller, with an average of 25 students compared to 32 in 2021 and 44 in 2020.

## In-country travel

NUMBER OF STUDENTS

ACTUALLY TRAVELED

EXPECTED TO TRAVEL



### Year-on-year comparison



+330%

2021 vs 2022



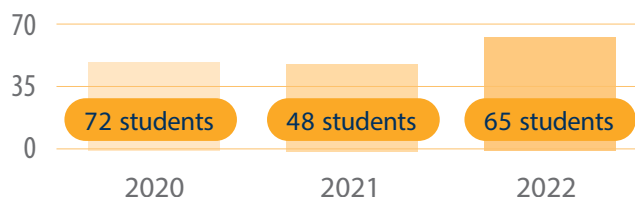
-24%

2019 vs 2022

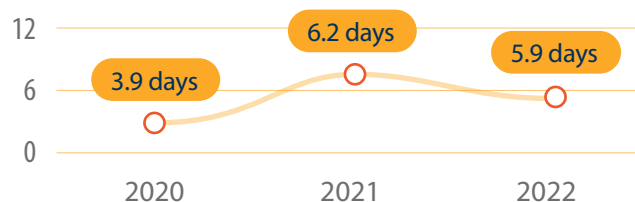
Based on 85 STOs running in-country trips.



### Average group size (students)



### Average trip duration (days)



### Share of customers who traveled to the following destinations

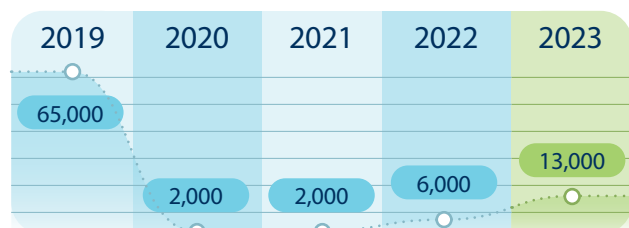
Orlando	20%	Los Angeles	6%	Philadelphia	4%	Gettysburg	3%	Memphis	2%	San Francisco	2%
Washington, D.C.	20%	Williamsburg	6%	Boston	3%	Seattle	3%	Nashville	2%	St. Louis	1%
New York	15%	Atlanta	5%	Chicago	3%	Branson	2%	Puerto Rico	2%	New Orleans	0%

## Out-of-country travel

NUMBER OF STUDENTS

ACTUALLY TRAVELED

EXPECTED TO TRAVEL



### Year-on-year comparison



+19%

2021 vs 2022



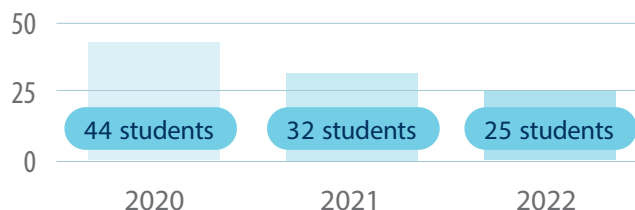
-91%

2019 vs 2022

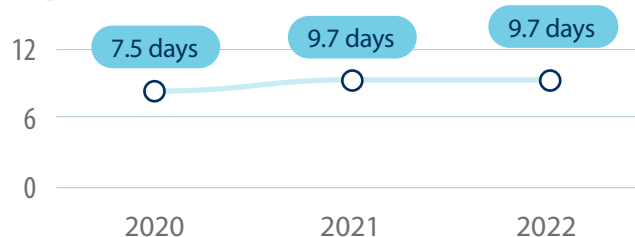
Based on 42 STOs running in-country trips.



### Average group size (students)



### Average trip duration (days)



THANK YOU

SYTA RESEARCH WOULD NOT BE POSSIBLE WITHOUT THE  
SUPPORT OF ITS VALUED MEMBERS AND PARTNERS.

