Student Travel

BUSINESS BAROMETER

SYTA
STUDENT
TRAVEL
RESEARCH

ANNUAL
REPORT
2023

Student Travel
Business Barometer
Annual Report 2023

About us

SYTA is the premier association of businesses dedicated to providing life enhancing travel experiences to students and young people.

SYTA Student Travel Research, the association's research brand, conducts independent research to provide global evidence of the size, trends and importance of student travel to assist our members in achieving data driven strategies for building their businesses.

The Student Travel Business Barometer is the only comprehensive quantitative study of year-on-year growth and forecast data for national and international tour operators who serve student and youth travelers.

To find out more about SYTA's research, please visit www.syta.org/student-travel-research

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 member of ESOMAR World Research.

For more information about the Barometer, please contact us at: *ivana.bartosik@bonard.com.*

To find out more about BONARD, please visit www.bonard.com or connect with us on

Foreword

WHEN SYTA INITIATED THE STUDENT TRAVEL BUSINESS BAROMETER IN 2018, WE TOOK A GIANT STEP TOWARD OUR VISION OF BEING THE GLOBAL SOURCE FOR DATA THAT DRIVES AND INFORMS THE STUDENT GROUP TRAVEL INDUSTRY. THIS INDEPENDENT QUANTITATIVE RESEARCH STUDY HAS BECOME AN IMPORTANT TOOL TO HELP OUR MEMBERS ACHIEVE DATA DRIVEN STRATEGIES FOR BUILDING THEIR BUSINESSES.

In its fifth year, the Barometer now offers a comprehensive view of one complete market cycle – capturing the industry's pre-pandemic size and trends, documenting the effects of the Covid-19 pandemic, and tracking the gradual recovery that has led to establishing 2023 as a new baseline for future measurement benchmarks.

This report draws upon a consistent sample of leading student tour operators spanning up to 20 countries who contributed their time and data. We want to thank them for their continued participation in our study.
This year, 134 student tour operators spanning 16 countries responded to the 2023 Business Barometer. They represent 30% of the leading student tour operators globally and moved more than 1.4 million students.

In North America, which constitutes the largest segment of the global study, survey participants represent 44% of the market, which is estimated to be 2.85 million student group travelers (student trips organized by tour operators).

For experienced student group tour operators, the Barometer delivers a reliable tool to assess their performance relative to industry peers. It identifies emerging shifts in student and/or educator preferences and behavior. For newcomers to the business, it is a useful "at-a-glance" look at the full scope of the student group travel market and a valuable resource for teachers planning their first trip with a tour operator. It allows group travel planners to see where student groups are traveling, average cost and duration of trips, and much more.

Looking at the Barometer data over the past five years, as well as assessing the trends in student travel, we are confident that the speed of student travel recovery following the virtual shut down during Covid 19 indicates that, more than ever, educators believe that experiences outside the classroom positively impact their students' education and social development and that student group travel is a solid investment. We believe that this is even stronger validation of the importance of the student group travel market to the world's economy, and to fostering a solid increase of travelers for the future.

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

Patrik Pavlacic MRICS
Chief Intelligence Officer
BONARD

The "Covid Effect" on Student Group Travel – A 5-Year Retrospective

The data is clear: The student group travel sector showed remarkable resilience in the wake of Covid 19.

Looking back to 2019, student tour operators participating in the Barometer represented 1.2 million students traveling in groups and organized an estimated total of 25,300 student group trips. Student tour operators were experiencing their highest numbers of students traveling to date and were anticipating record growth for 2020. However, the devastating worldwide effects of Covid-19 resulted in a sharp decline of 86% in the number of student travelers in 2020 and a continued decline in 2021. The student travel sector, led by the U.S., started to rebound in 2022 and surpassed 2019 numbers in 2023.

Significant Student Group Travel Highlights – 2019 to 2023

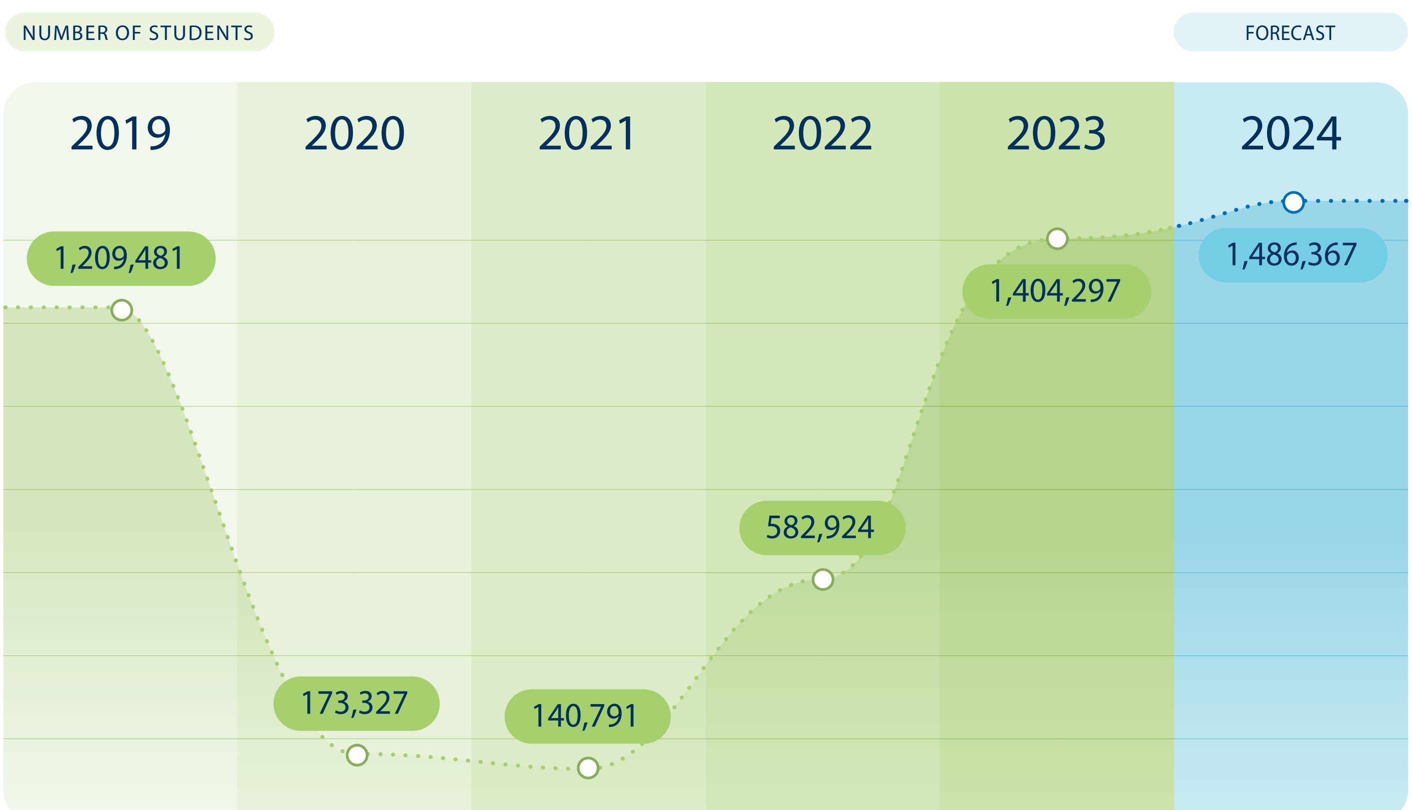
The following highlights from our five-year review of Barometer data are supported by interviews conducted with our participants as well as trends we have observed.

- The student group travel market showed remarkable durability, moving from a cumulative loss of $638 million in revenue in 2021 and 80% reduction in number of travelers to a rapid recovery in three short years.
- The surveyed operators showed a student travel volume of 1.4 million students in 2023 which surpassed 2019 levels by 16%.
- In-country travel, including local and regional trips, increased during the Covid-19 pandemic as the result of travel restrictions and health and safety concerns. Today this trend continues with more tour operators booking local and regional travel in addition to their traditional programs.
- In-country travel surpassed 2019 numbers in 2023 and is estimated to remain at this level in 2024.
- Average trip duration for in-country students returned to the pre-pandemic standard, and the average group size increased.
- Global out-of-country student travel increased 240 percent in 2023, as the opportunity to travel abroad increased and students and teachers acted on pent up demand. This trend is forecasted to continue in 2024.
- The U.S. and UK attracted the largest share of out-of-country visitors over this period.
- Asia was noticeably absent from the list of leading destinations while new destinations in Europe and Africa emerged.
- Trends impacting student tour operator businesses include the adoption of new technology and payment platforms to manage their businesses, increased financial transparency and the acceptance of travel insurance products as part of the trip planning process.
- More educators and administrators turned to student group tour operators to facilitate their students' travel experiences.
- According to student tour operators interviewed as part of the study, there has been increasing interest in sustainable, culturally immersive travel options and outdoor, natural experiences, shifting from "volunteer" or service opportunities to sustainable travel.
- The Covid-19 pandemic created an increased demand for more outdoor destinations and nature-based experiences. This trend was complemented by a shift towards spending more time in a single destination.
- Due to a significant reduction in music programs during Covid-19, we also saw a lower percentage of student travelers in that sector, however we see a resurgence beginning in 2023.

Student group travel Business Barometer 5-year overview

	2019	2023
STUDENTS TRAVELING	1.2m	1.4m
TRIPS TAKEN	25,300	26,700

Number of students taking trips in past five years

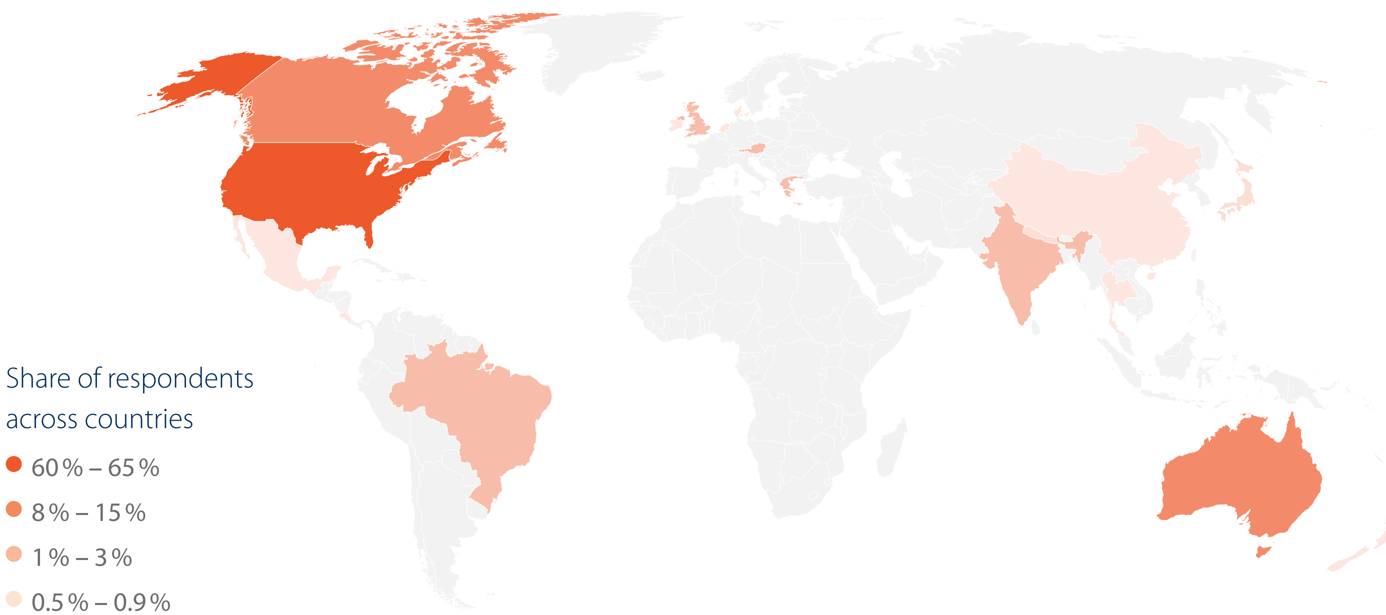


Source: SYTA, BONARD, 2023

Introduction – 2023 Results

THE RESULTS OF THE 2023 BAROMETER SURVEY ARE BASED ON RESPONSES FROM **134 TOUR OPERATORS AND TRAVEL AND EDUCATION AGENCIES FROM 16 COUNTRIES WORLDWIDE.**

THESE PARTICIPANTS REPRESENT KEY INDUSTRY PLAYERS AND THE TRENDS IMPACTING STUDENT TRAVEL IN 2023.



24%

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

15%

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

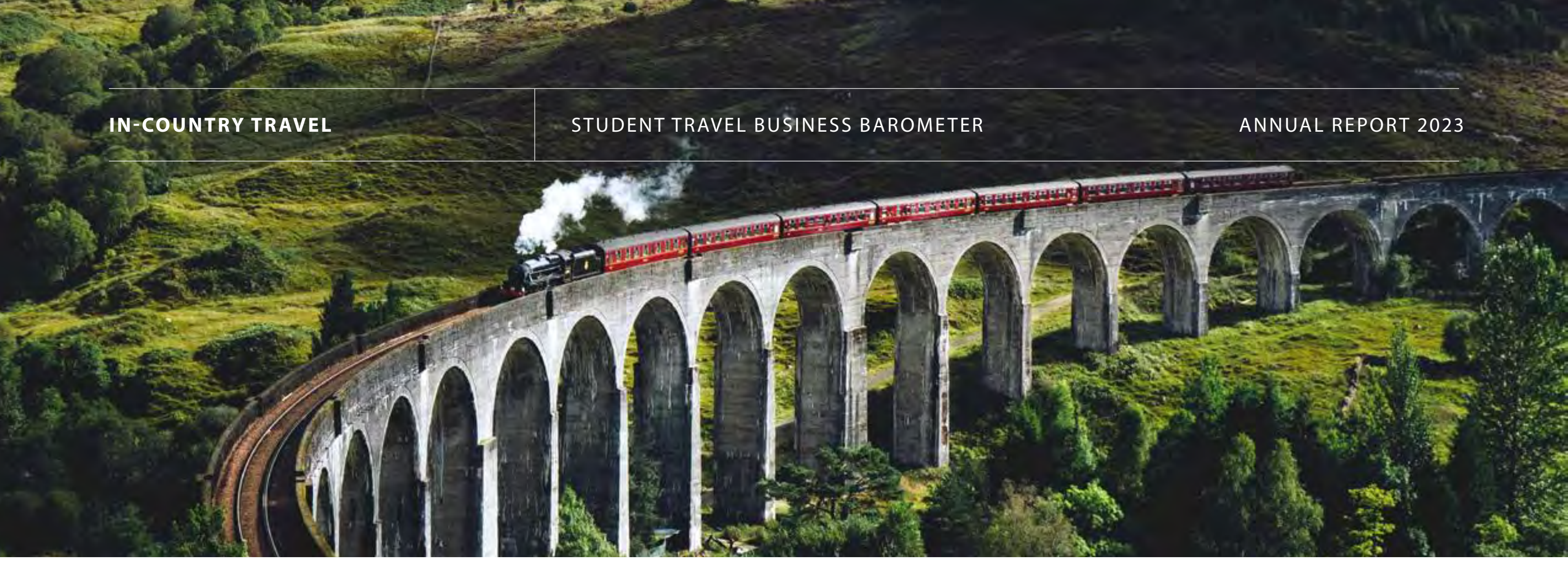
61%

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.

Data collection was carried out between December 2023 and February 2024.



Global overview

In-country travel

OVER 1.13 MILLION STUDENTS TOOK IN-COUNTRY TRIPS IN 2023, EXCEEDING 2022 LEVELS BY 125%. FURTHERMORE, IN-COUNTRY TRAVEL SURPASSED 2019 VOLUMES BY 22%.

Several factors contributed to this growth which now shows in-country travel stayed on pace with expectations and exceeded pre-pandemic numbers.

Covid-19 Pandemic Barriers Removed

With pandemic barriers removed, educators and students returned to more traditional volumes in 2023 than in post-pandemic years of 2020-2022. A greater proportion of students adhered to their planned travel in 2023 (83%) compared to 2022, when only 65% of students kept their plans. There were also fewer postponed trips in 2023, only 2% compared to 10% in 2022. These are positive indicators for the future of student group travel.

Duration and Size of Groups Stabilizing

The average trip duration of in-country students returned to the pre-pandemic industry standard of 4.3 days in 2023, a decrease from 5.9 days in 2022. The average group size increased from 52 students in 2022 to 62 students in 2023.

Types of Tours Changing

Educational-themed tours attracted 39% of the student base, leading the tour categories compared to performance group tours that traditionally led this category. Tour operators surveyed offered more specialized educational travel programs, touching on more cultural, ethnic and community-based interests, reflecting changing preferences by both educators and their students who are increasingly sensitive to sustainability and DEIA concerns.

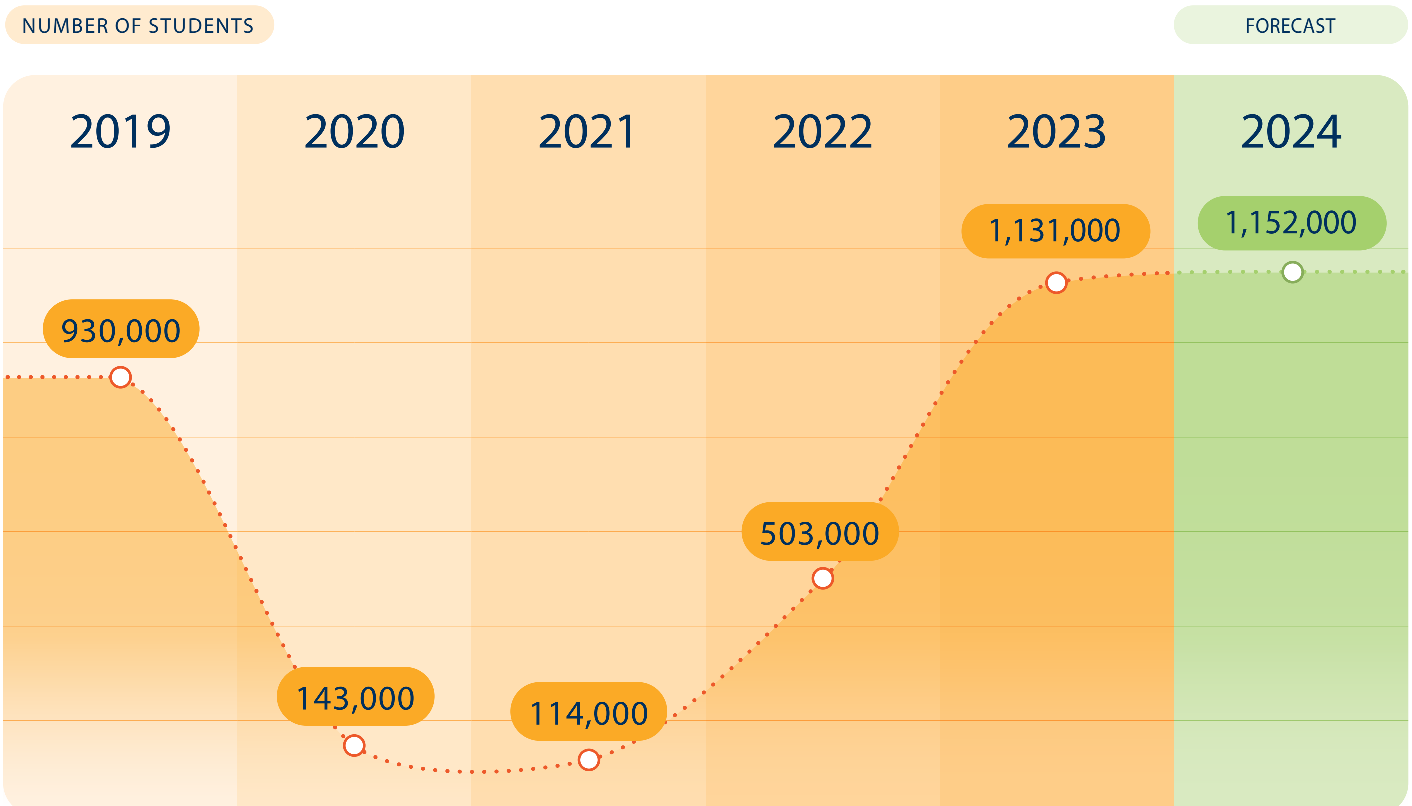
While performance/arts typically attract the most student travelers, this category was the most impacted of all due to the cut back of in-person learning and performance opportunities during the pandemic, and has been recovering at a slower pace. In 2023, these garnered a 33% market share. However, this number is expected to increase in 2024 and beyond as more students return to music programs.

Student tour operators anticipate more in-country travelers taking multi-day interstate trips in 2024. Additionally, overnight trips are expected to also rise in popularity among student groups. Survey tour operators expect both trip types to increase in demand by 17%. One-day trips are set to rise by 12% while multi-day local trips within the same state are expected to grow by 9%.

Forecast for 2024

Heading into 2024, tour operators surveyed forecast their in-country travel to grow to 1.15 million student group travelers.

Number of students taking an in-country trip



Based on 78 STOs planning in-country trips.

STUDENTS EXPECTED TO TRAVEL IN 2023

1.12m

STUDENTS

ACTUAL NUMBER OF STUDENTS TRAVELING

1.13m

STUDENTS

INCREASE IN THE NUMBER OF STUDENTS TRAVELING

+125%

2023 vs 2022

PARTICIPATING TOUR OPERATORS EXPECTED TO TRAVEL MORE THAN 1.2M STUDENTS IN 2023 BUT ACTUALLY MOVED MORE THAN 1.13M STUDENTS.

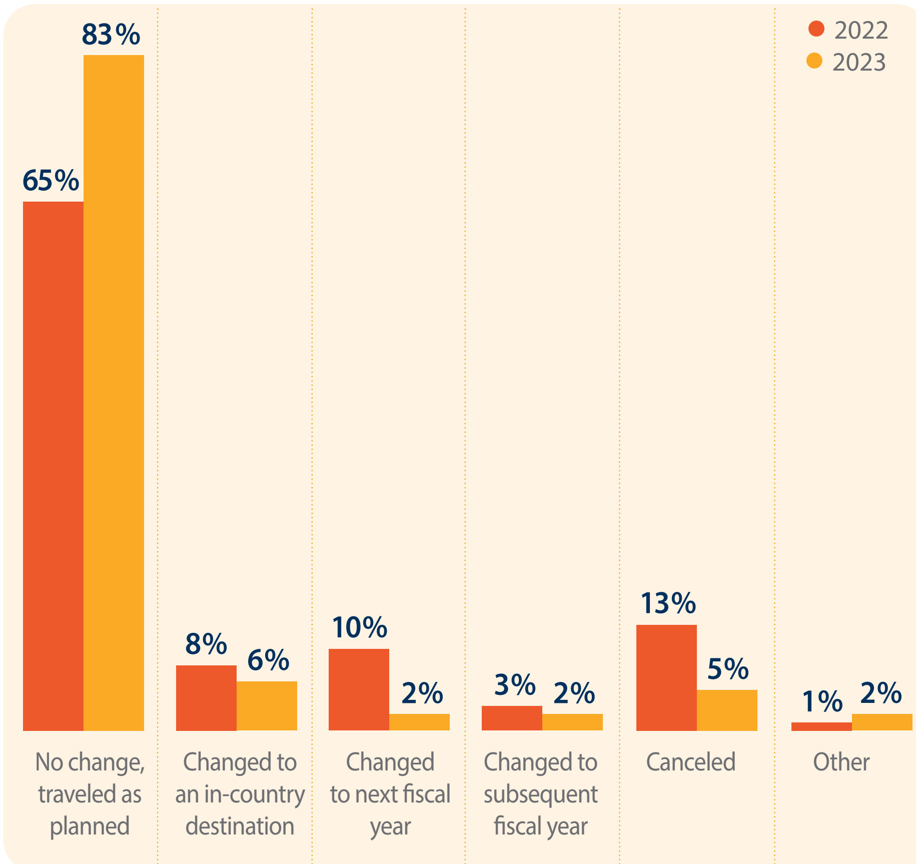
Travel plans

Change in travelers' in-country travel plans

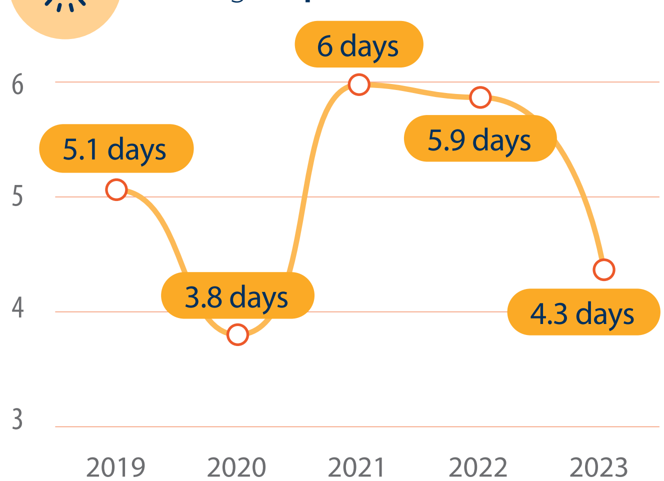
In-country travel turned a corner in 2023, with a significant share of students keeping their scheduled travel plans. Fueled by all-new bookings without any pandemic vouchers or credits, the jump in in-country travel numbers restored healthy revenues and a positive outlook from a business sustainability point of view.

Eighty-three percent of in-country trips occurred as planned in 2023 compared to 65% in 2022.

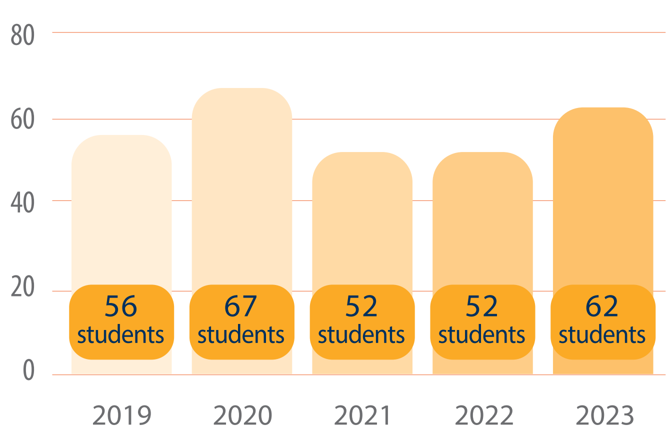
Only 5% of the trips were canceled compared to 13% in 2022, and 2% were postponed to 2024 compared to the 10% of travel plans postponed in the year before.



Average **trip duration**



Average **group size**



Average trip prices per trip type in 2023

The analysis showed that the average price for a one-day trip was $230.

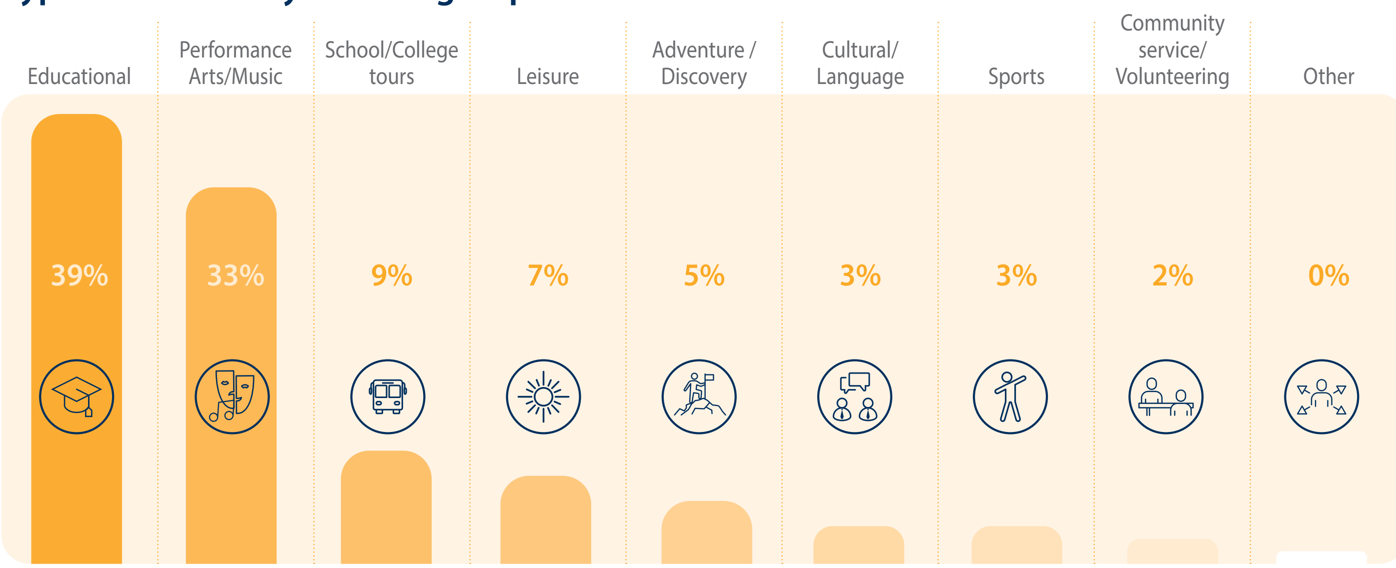
A three-day local/regional trip cost $1,050, while a four-day interstate trip cost $1,726 with ground transportation and $1,958 with air travel. The average cost per day for a local trip was $80 lower compared to an interstate trip using ground transportation ($350 vs. $431). Costs for in-country trips were fairly distributed, with accommodation, admission fees, and meals accounting for 75-85% of the overall cost.

	Total trip cost	Accommodation*	Admission fee	Meals	Insurance	Transportation
One-day trip in T1 destination	$230	n/a	$73	$60	$25	$71
3-days local/regional trip (with ground transportation)	$1 050	$213	$262	$381	$69	$125
4-days interstate trip (with ground transportation)	$1 726	$426	$505	$548	$125	$122
4-days interstate trip (with air travel)	$1 958	$426	$505	$548	$125	$354

Note: *Double occupancy, price per person*

T1 destination refers to well-established and popular travel spots that have a long history of attracting tourists. These places are often known for their iconic landmarks, rich cultural heritage, and widespread recognition. T1 destinations may include major global cities like London, Paris, New York City, Rome, and Tokyo.

Types of in-country student group tours in 2023



Note: *The number does not up to 100% due to rounding.*

Global overview

Out-of-country travel

GLOBAL OUT-OF-COUNTRY STUDENT TRAVEL INCREASED 240 PERCENT YEAR OVER YEAR IN 2023 TO ALMOST 273,000 STUDENTS TRAVELING VERSUS 80,000 IN 2022.

The volume of out-of-country travel in 2023 nearly matched 2019 levels, when 280,000 students traveled internationally. This is a stark contrast to the pandemic years when only 30,000 students traveled in 2020 and 27,000 students traveled in 2021.

While for in-country travel, the industry saw a significant increase already in 2022, the major uptick for out-of-country travel happened in 2023.

Destination Preferences Shifting

The most popular travel destinations have remained consistent over the past five years, with the UK, U.S., and Canada still being top choices. However, there has been a noticeable shift towards new destinations within Europe, such as Greece, Slovenia, and Switzerland. France led continental Europe, attracting 10% of all traveling students. According to surveys of tour operators, Italy is projected to become the leading destination in 2024, expected to attract 19% of students, slightly more than the UK and U.S.

Asia's absence from the preferred destination rankings may be due to rising air transportation costs and ongoing tighter entry and exit restrictions. The high cost of air from many countries may also account for the low number of travelers to Australia, Africa and some parts of Latin America.

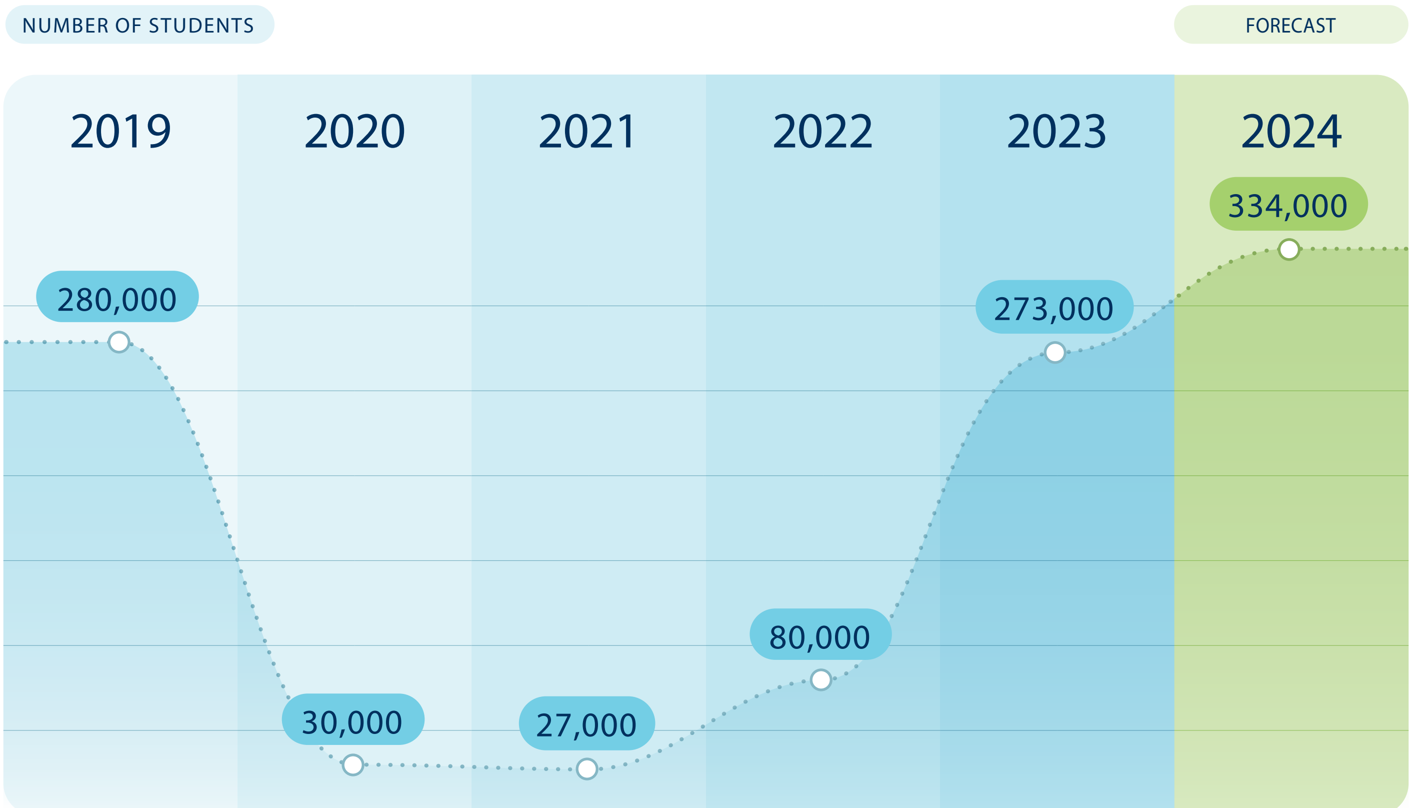
Trip Duration and Size of Groups Experienced Small Changes

In 2023, students traveling abroad spent an average of 8.7 days out of the country, down from 9.7 days in 2022. The average group size increased from 25 to 41 students. A key reason for this shift was economic; rising costs led groups to shorten their trips by one day to afford travel to their preferred destinations.

Forecast for 2024

The outlook for out-of-country student travel in 2024 anticipates continuous growth. With 334,000 students expected to travel, this would represent a further 22% increase over 2023 and surpass 2019 levels by 19%. The enthusiasm among students for out-of-country travel remains strong.

Number of students taking an out-of-country trip



Based on 52 STOs planning out-of-country trips.

STUDENTS EXPECTED TO TRAVEL IN 2023

277,363

STUDENTS

ACTUAL NUMBER OF STUDENTS TRAVELING

272,985

STUDENTS

INCREASE IN THE NUMBER OF STUDENTS TRAVELING

+240 %

2023 vs 2022

STUDENT TOUR OPERATORS ANTICIPATED 277,000 STUDENTS TRAVELING IN 2023. THE FORECAST WAS NEARLY ACCURATE, WITH 273,000 STUDENTS ACTUALLY TAKING TRIPS

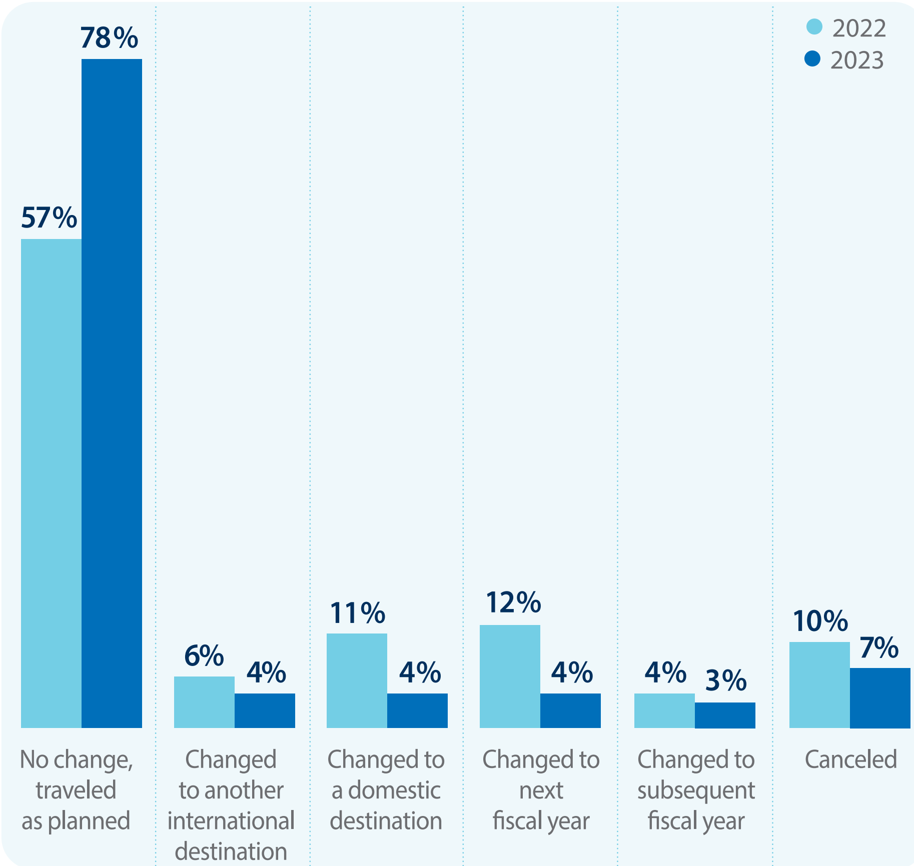
Travel plans

Change in travelers' out-of-country travel plans

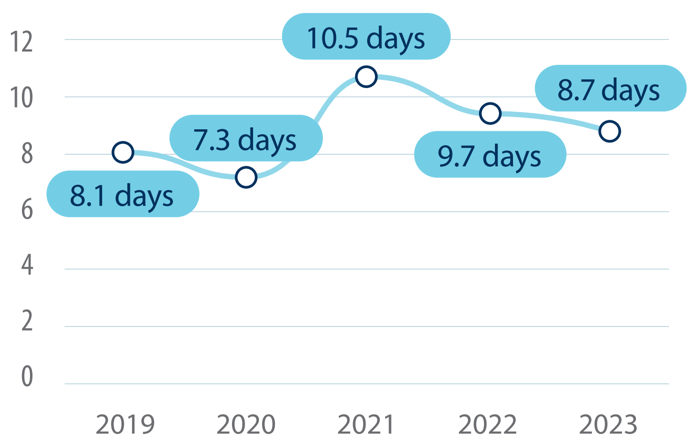
Out-of-country travel grew at a faster pace than in-country travel between 2022 and 2023. In 2023, 78% of students maintained their original plans for out-of-country trips, a significant increase from 57% in 2022.

In 2023, only 4% canceled plans and 7% were postponed, while in 2022, 12% of students postponed their travel plans and 10% canceled.

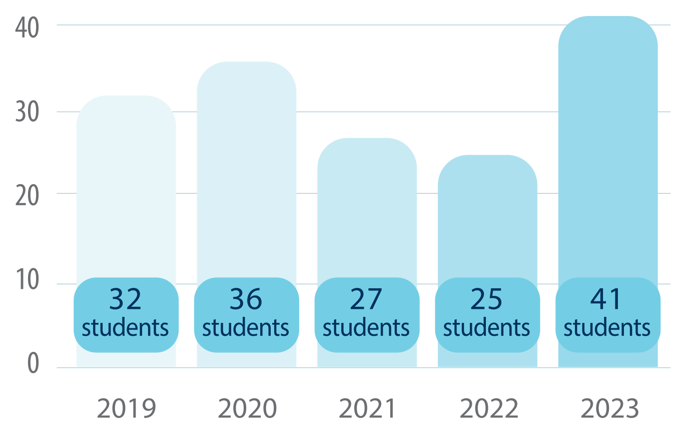
FEWER STUDENTS CHANGED TO A DIFFERENT INTERNATIONAL DESTINATION – 4% IN 2023 VERSUS 6% IN 2022 – AND ONLY 4% CHANGED THEIR ITINERARY TO AN IN-COUNTRY DESTINATION COMPARED TO 11% IN 2022.



Average **trip duration**



Average **group size**



Average trip prices per trip type in 2023

Lower costs were one reason student groups explored T2 destinations. The overall cost for a seven-day out-of-country trip to a T1 destination with air travel was $416 more expensive than the same trip to a T2 destination. The only trip component with a higher price tag in a T2 destination was transportation, due to limited frequency and availability. Compared to in-country trips, where meals made up about 30-35% of the overall cost, out-of-country trips saw meals accounting for 40-50% of the cost.

	Total trip cost	Accommodation*	Admission fee	Meals	Insurance	Transportation
7-days out-of-country trip to T1 destination (with ground transportation)	$3 113	$425	$885	$1 449	$163	$191
7-days out-of-country trip to T1 destination (with air travel)	$3 113	$425	$885	$1 449	$163	$191
7-days out-of-country trip to T2 destination (with ground transportation)	$2 630	$385	$600	$1 351	$87	$207
7-days out-of-country trip to T2 destination (with air travel)	$3 260	$385	$600	$1 351	$163	$761

Note: *Double occupancy, price per person*

T1 destination refers to well-established and popular travel spots that have a long history of attracting tourists. These places are often known for their iconic landmarks, rich cultural heritage, and widespread recognition. T1 destinations may include major global cities like London, Paris, New York City, Rome, and Tokyo.

T2 destination is less-known or off-the-beaten-path locations that are gaining popularity among travelers seeking unique and less crowded experiences. These destinations can be in smaller towns, rural areas, or emerging travel hotspots that may not have the same level of tourist infrastructure as traditional destinations

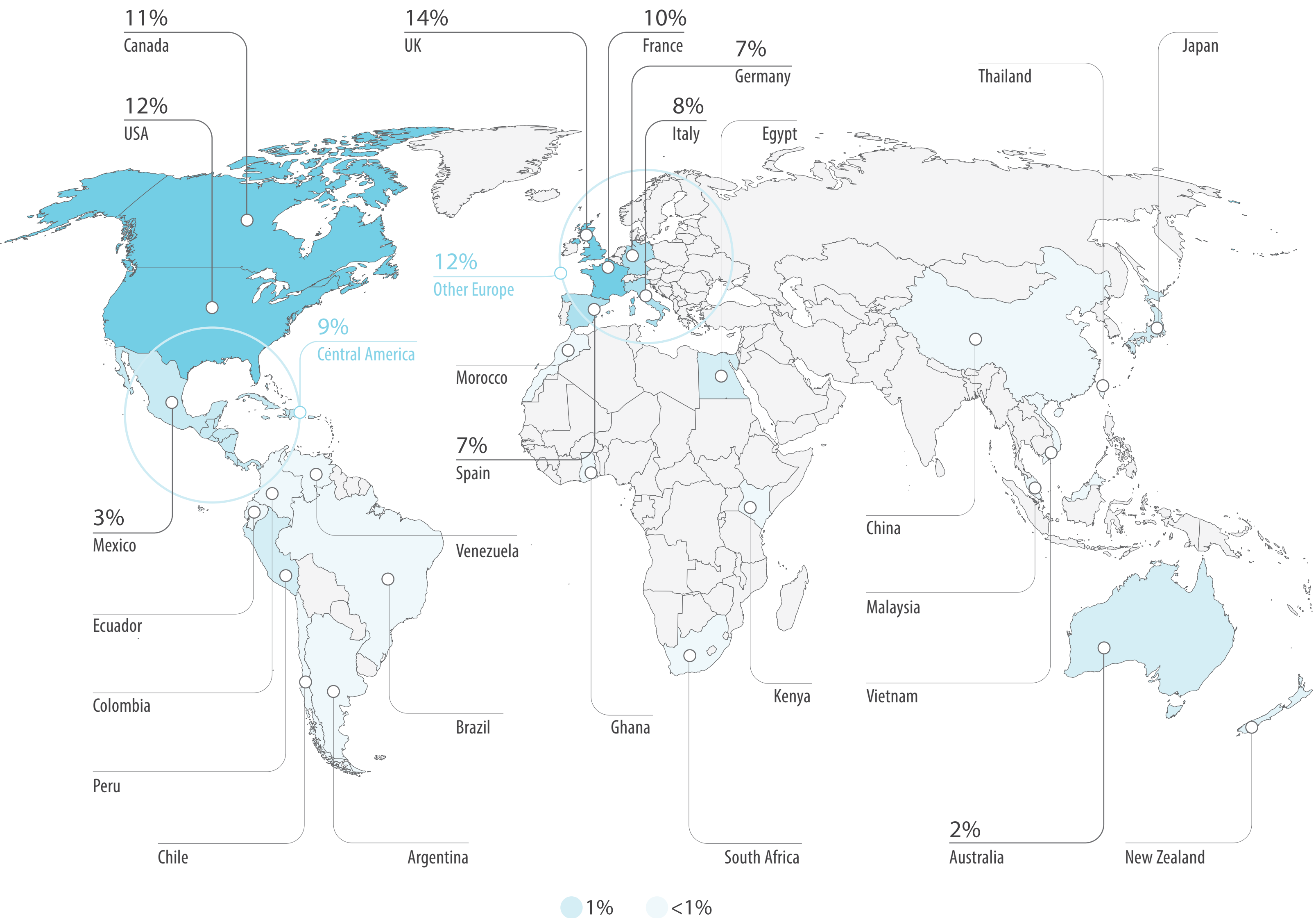
Destination preference

Share of students traveling to selected destinations

THE UK AND U.S. ATTRACTED THE LARGEST SHARE OF OUT-OF-COUNTRY STUDENT TRAVELERS IN 2023 AT 14% AND 12%, RESPECTIVELY. THESE ARE FOLLOWED CLOSELY BY CANADA (11%), FRANCE (10%), CENTRAL AMERICA (9%), ITALY (8%), GERMANY (7%) AND SPAIN (7%).

An additional 12% of student group travel was to other European nations which indicates that students are increasingly exploring less conventional European destinations, such as Greece and Switzerland.

Also, nontraditional destinations are appearing on the map, including countries from African regions (South Africa, Ghana, Kenya and Egypt). The U.S. stood out as a favorite among Canada-based tour groups, with more than half (52%) selecting it, followed by France (12%), Spain (7%), Central America (6%) and the UK (5%)



Share of students traveling to top 5 destinations

EUROPE-BASED TOUR OPERATORS

UK	27%
FRANCE	24%
GERMANY	15%
ITALY	10%
USA	4%

CANADA-BASED TOUR OPERATORS

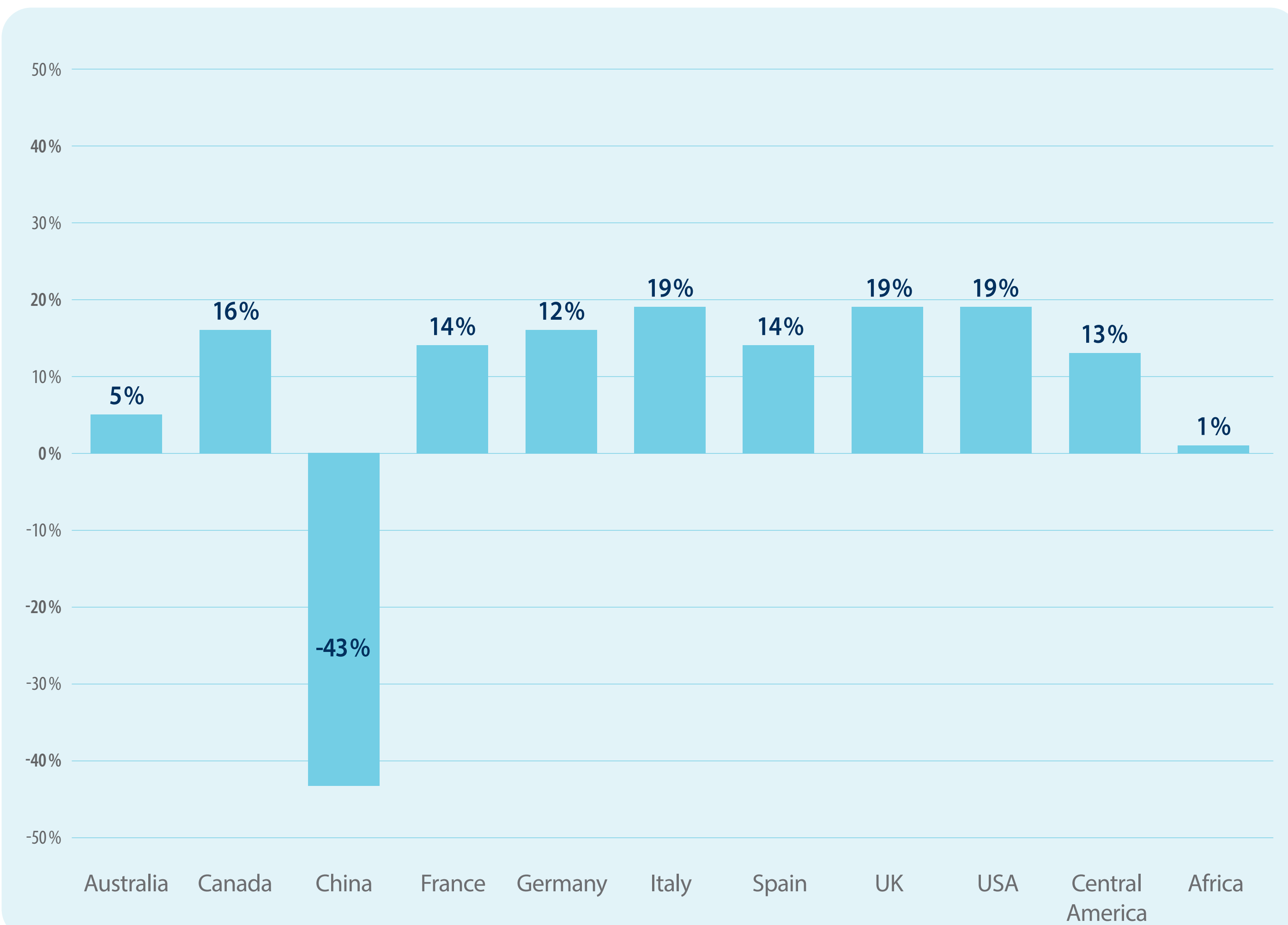
USA	52%
FRANCE	12%
SPAIN	7%
CENTRAL AMERICA	6%
UK	5%

U.S.-BASED TOUR OPERATORS

UK	20%
CANADA	14%
CENTRAL AMERICA	14%
FRANCE	13%
ITALY	13%

Expected student group travel demand for 2024

for the following destinations compared to 2023



Transportation

IN THE 2022 AND 2023 BUSINESS BAROMETER, A SERIES OF QUESTIONS ARE INCLUDED REGARDING MOTORCOACH TRANSPORTATION. THE SUMMARY INCLUDES NOTABLE CHANGES BETWEEN THE TWO YEARS.

In 2023, student groups were more particular about the motorcoach companies they travel with, seeking higher standards of safety and reliability.

STUDENT GROUP LEADERS ARE MORE ENGAGED IN THE PLANNING PROCESS WITH REQUESTS THAT TOUR OPERATORS USE SPECIFIC MOTORCOACH COMPANIES PER THEIR SCHOOLS' PREFERRED VENDOR LISTS.

Namely, student groups requested tour operators to use a motorcoach company from their preferred vendor list more frequently – 82% noted the answer 'yes' or 'sometimes' in 2023 (compared to 52% in 2022). This highlights not only an opportunity for motorcoach companies to become part of student groups' preferred vendor lists but also for tour operators to align with consumer preferences.

Due to safety concerns and a driver shortage in the motorcoach industry, tour operators in 2022 booked fewer overnight trips than they did in 2023.

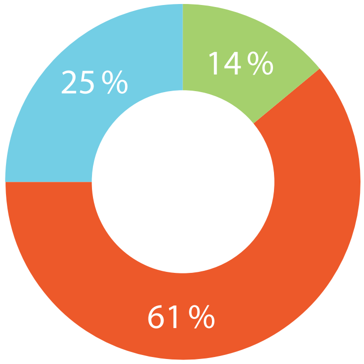
In 2023, 80% of student tour operators booked day trips compared to 69% in 2022 resulting in an increase in motorcoach travel in 2023.

THERE WAS SIGNIFICANT RELAXATION IN ATTITUDES TOWARD COVID-19 HEALTH PROTOCOLS WITH ONLY 8% OF STUDENT GROUPS REQUESTING DRIVERS WHO ARE VACCINATED OR WEAR MASKS. THIS WAS A SHARP DECLINE FROM THE PREVIOUS YEAR WHEN NEARLY A THIRD (31%) INSISTED ON THESE HEALTH PRECAUTIONS.

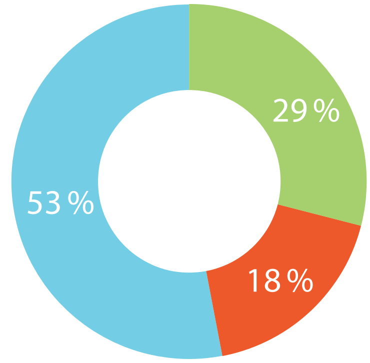
In addition, the demand for motorcoach companies to have a sustainability or green policy declined in 2023 compared to 2022. Although sustainability is important to student travelers, the need for accessible and affordable motorcoach transportation appears more important to student group planners.

Yes   No   Sometimes

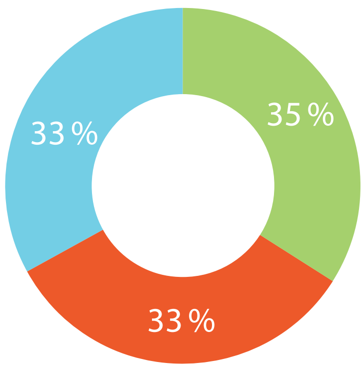
Do you work with a third-party ground operator who books motorcoaches for your groups?



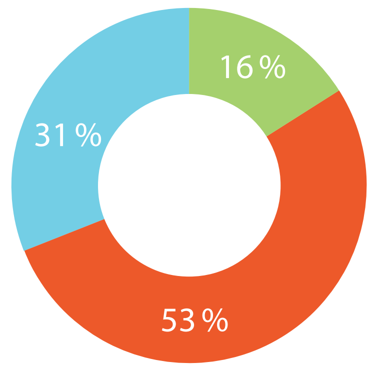
Do your student groups ask that you use a motorcoach company from their preferred vendor list?



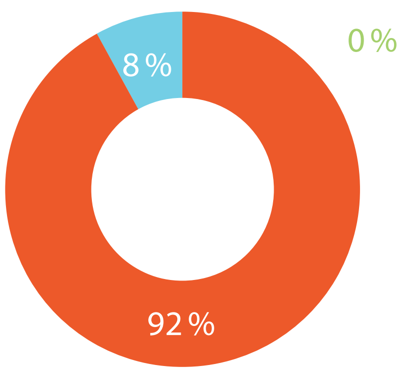
Do you book motorcoaches that will drive through the night for overnight trips?



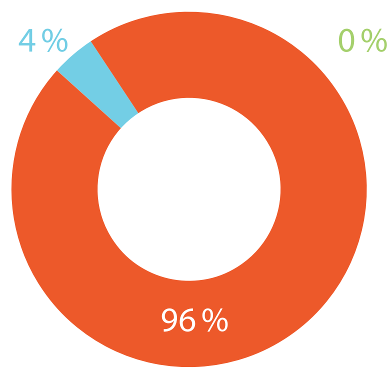
Do your student groups request motorcoaches with seat belts?



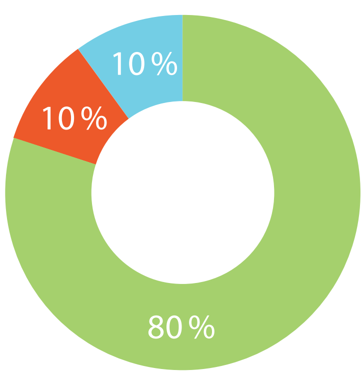
Do your student groups ask that drivers be vaccinated or wear a mask?



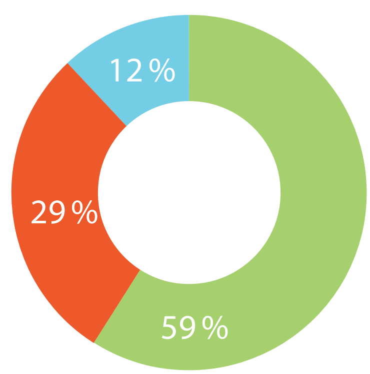
Do your student groups ask if the motorcoach company has a sustainability or green policy?



Do you book motorcoaches for day trips?



Do you see more requests for motorcoach trips compared to air?



COUNTRY PROFILE

Australia

In 2023, in-country travel within Australia remained a preferred choice for student tours due to affordability. The number of students traveling within Australia soared to 70,800, from 42,000 in 2022. This is a considerable increase, but student numbers remained well below 2019 levels (92,000).

The rising cost of living, high travel expenses, particularly airfares, and global uncertainties such as instability and over-tourism in Europe, continued to dampen the enthusiasm for out-of-country student travel. This trend was reflected in the significant drop in the number of students traveling abroad, with only 15,000 making out-of-country trips compared to 32,000 in 2019.

Despite these challenges, there was a revival in out-of-country travel plans that were initially set before the pandemic.

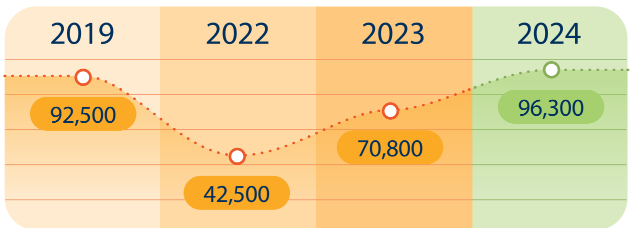
International travel to Australia also resumed, supported by traditional tours, which restarted after the pandemic, and new international interest, particularly from China. Chinese student tour operators reported a governmental push towards out-of-country travel, favoring destinations perceived as safe and welcoming like the UK, Australia, and New Zealand. This shift comes amid major visa complications and perceived unfriendliness from the USA and Canada, alongside the instability in Europe. Yet, the uptake of these international tours has been uneven, with some tours not reaching expected numbers or being canceled, primarily due to the aforementioned challenges.

The average trip duration for in-country trips shortened from from 5.5 days in 2022 to 4.5 days in 2023, while out-of-country travelers extended their stays from 9.1 days in 2022 to 11.2 days on average in 2023. In both categories, the average group size decreased, from 65 students to 57 for in-country travel, and a negligible decrease from 24 to 23 students in groups traveling abroad.

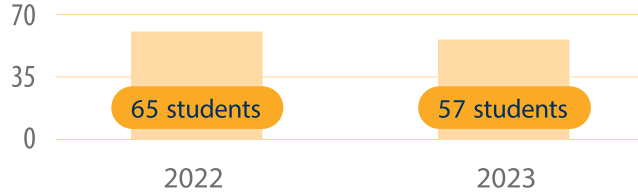
Looking ahead, while there is optimism for a recovery in student numbers for both in-country and out-of-country tours in 2024, the pressures from global events and economic factors suggest a cautious approach. Australia, in particular, is expected to see an influx of Chinese student groups, spurred by significant federal support aimed at training local suppliers to cater to this market effectively. This anticipated increase could test the capacity of the sector in Australia and the effectiveness of government initiatives in accommodating the rise in student travel.

In-country travel

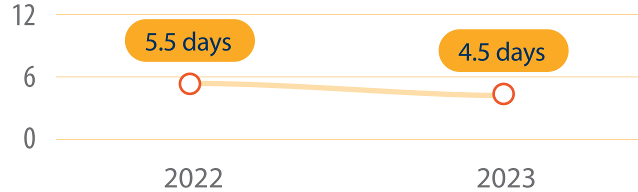
NUMBER OF STUDENTS



Average group size



Average trip duration



Year-on-year comparison

-23 %
2023 vs 2019

+67%
2023 vs 2022

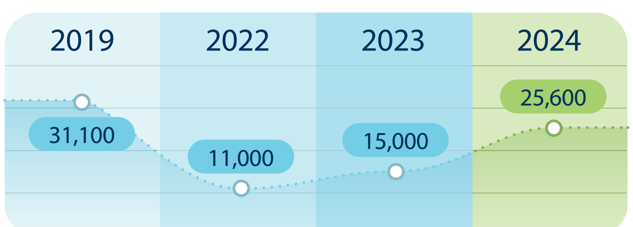
Based on 13 STOs running in-country trips.

Share of customers who traveled to the following destinations

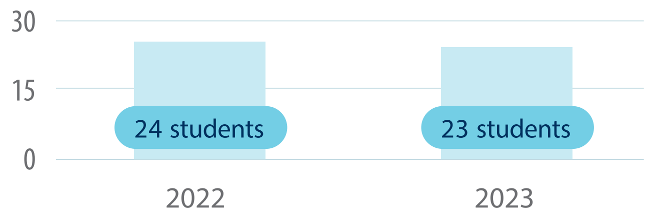
Canberra	38%	Victoria (excl ski resorts)	9%	New South Wales	4%	South Australia	0%
Australian Ski Resorts	24%	Northern Territory	6%	Western Australia	2%	Queensland Outback	0%
Cairns/North Queensland	12%	SE Queensland	4%	Tasmania	1%	Other	0%

Out-of-country travel

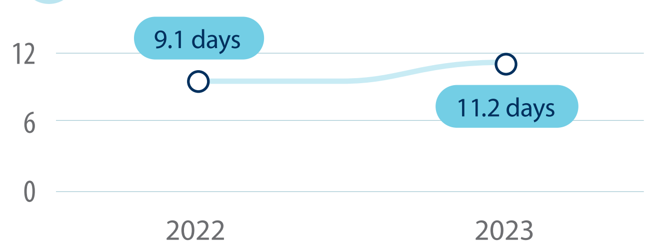
NUMBER OF STUDENTS



Average group size



Average trip duration



Year-on-year comparison

-52%
2023 vs 2019

+36%
2023 vs 2022

Based on 13 STOs running in-country trips.

COUNTRY PROFILE

Canada

Canada's in-country student group travel more than doubled in 2023, with 78,600 students traveling this past year versus 31,000 students in 2022. This remarkable growth is attributed entirely to new bookings, rather than cancelations.

Despite the substantial gains, in-country travel did not reach industry forecasts (87,400 students were expected to travel in 2023) and did not reach pre-pandemic levels, with the total number of students traveling still 29% lower than in 2019. The significant year-over-year growth in student travel demonstrates a resilient demand for student group travel within Canada, and the Canadian tour operators surveyed expressed a positive outlook for 2024 and beyond.

Both the average trip duration and average group size dropped in 2023. The average in-country tour lasted 3.5 days, down from the 5-day average of 2022. The average group size decreased from 72 students in 2022 to 45 in 2023, reflecting a return to 2019 industry standards.

Ottawa and Niagara Falls were the most popular in-country destinations, each attracting 23% of student travelers. Toronto attracted 20% of students; and Quebec City and Montreal followed, both at 16%.

Banff, Edmonton, and Calgary are commonly included as part of a multi-city travel option for student groups. Although these cities do not track individual visitor volumes, they collectively account for a significant share of travel.

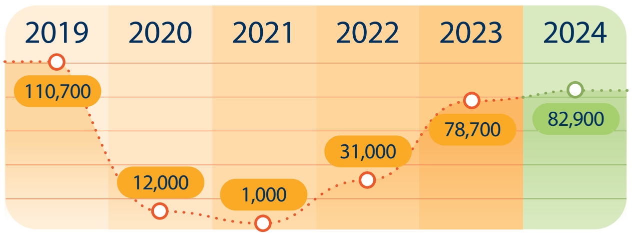
Out-of-country travel rebounded in 2023, tripling its previous year's volume with 63,400 students traveling internationally, beating industry predictions. Canada's out-of-country travel is closing in on its pre-pandemic levels (75,900 students traveled abroad in 2019).

Out-of-country students traveled an average of 6.1 days, down from the previous year's 8.3 days and the average group size increased from 25 to 37 students.

Looking ahead, tour operators expect the number of students to increase for both segments, with 82,900 students expected to travel in-country and 65,100 students predicted to travel out-of-country in 2024.

In-country travel

NUMBER OF STUDENTS



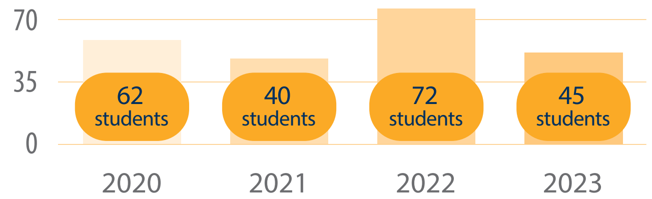
Year-on-year comparison

-29%
2023 vs 2019

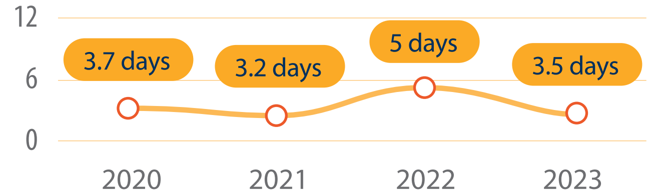
+154%
2023 vs 2022

Based on 13 STOs running in-country trips.

Average **group size**



Average **trip duration**

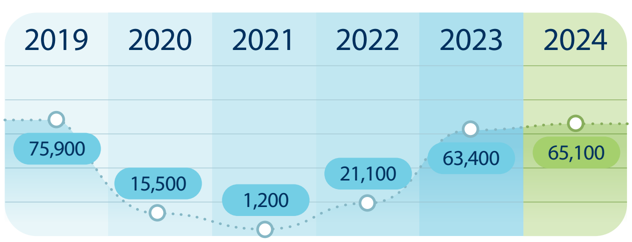


Share of customers who traveled to the following destinations

Ottawa	23%	Quebec City	16%	Other	1%	Winnipeg	0%
Niagara Falls	23%	Montreal	16%	Vancouver	0%	Charlottetown	0%
Toronto	20%	Whistler	2%	Banff	0%		

Out-of-country travel

NUMBER OF STUDENTS



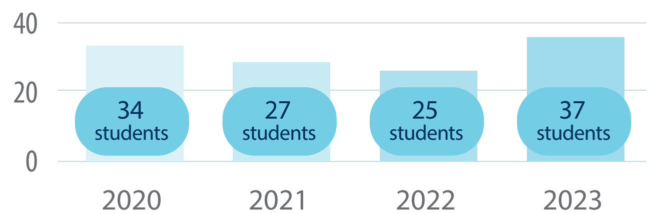
Year-on-year comparison

-16%
2023 vs 2019

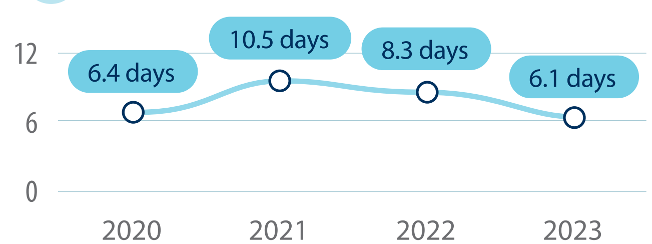
+200%
2023 vs 2022

Based on 13 STOs running in-country trips.

Average **group size**



Average **trip duration**



COUNTRY PROFILE

USA

The tour operators we surveyed reported nearly a million students traveled in-country in 2023, surpassing both industry expectations and 2019 pre-pandemic levels. Student travel numbers increased from 475,000 in 2022 to 973,500 in 2023, a 35% rise over the 2019 pre-pandemic volume.

The average trip lasted 4.3 days compared to 5.9 days in 2022, and the average group size increased from 65 students in 2022 to 71 students in 2023. Tour operators reverted back to using the standard 1 to 2 motorcoaches per trip.

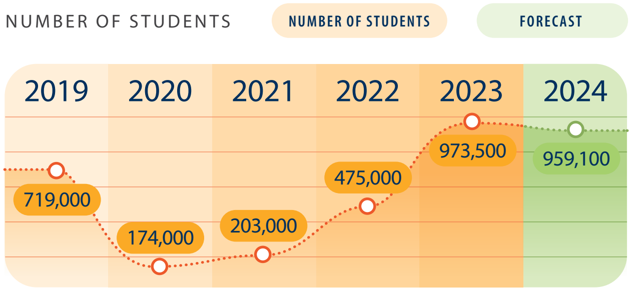
The standard trio of most popular U.S. destinations – Orlando, New York and Washington D.C. continued to dominate, with Orlando taking the top spot in 2023, welcoming 23% of student travelers. Washington, D.C. and New York followed at 19% and 17% of the market share respectively. The 2023 ranking of New York can be attributed to the stricter restrictions upheld by the city into 2023, as well as higher costs.

Other popular destinations included Williamsburg, Chicago, Los Angeles, Philadelphia and Atlanta. Both Puerto Rico and Nashville outranked Boston in 2023. Student tour operators observed the continuing trend of students and teachers preferring destinations offering access to National Parks and natural attractions.

Out-of-country travel from the U.S. also experienced a significant spike in 2023 with 147,500 students traveling internationally, representing a nearly threefold increase from 2022 and a 33% increase over 2019.

In-country travel in the U.S. is by far the largest segment, and with the significant increase in the 2023 volume, tour operators surveyed expect the growth to slow down in 2024. On the other hand, the much smaller segment of out of country travelers are projected to grow by a substantial 43% in 2024, adding a heathy 147,500 to the almost one million in-country travelers and a total 2024 forecast of 211,400.

In-country travel



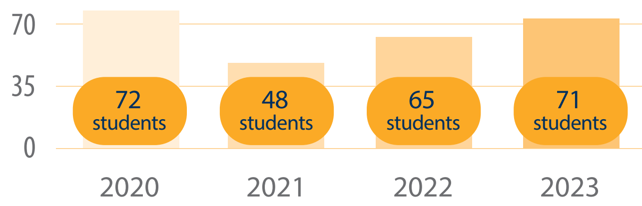
Year-on-year comparison

+35% — 2023 vs 2019

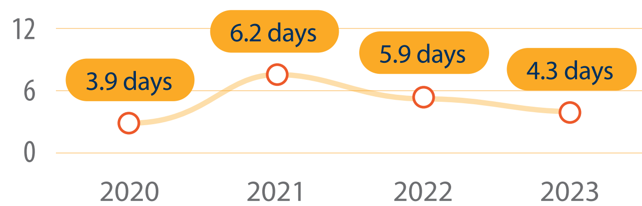
+105% — 2023 vs 2022

Based on 57 STOs running in-country trips.

Average group size



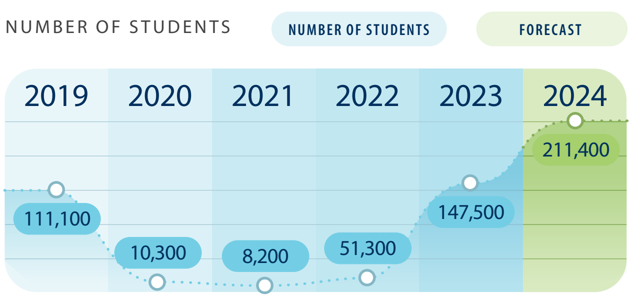
Average trip duration



Share of customers who traveled to the following destinations

Orlando	23%	Williamsburg	5%	Philadelphia	3%	Gettysburg	1%	Cleveland	1%
Washington, D.C	19%	Chicago	4%	Puerto Rico	2%	St. Louis	1%	Branson	1%
New York	17%	Los Angeles	4%	Nashville	2%	San Francisco	1%	Seattle	0%
Other	11%	Atlanta	3%	Boston	2%	New Orleans	1%	Memphis	0%

Out-of-country travel



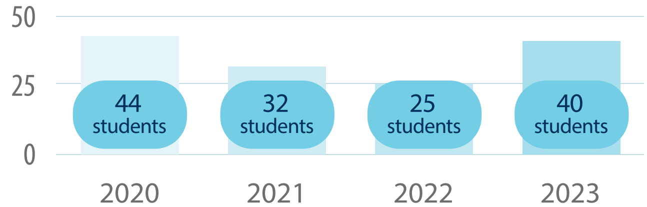
Year-on-year comparison

+33% — 2023 vs 2019

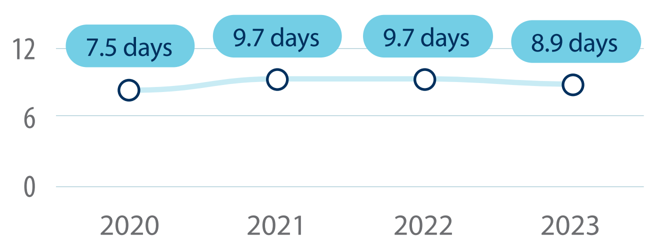
+188% — 2023 vs 2022

Based on 30 STOs running in-country trips.

Average group size



Average trip duration



ANNUAL REPORT 2023

The Student & Youth Travel Association (SYTA) is the only organization to generate any definitive data on the student group travel market. SYTA is the premier association dedicated to providing life enhancing travel experiences to students and young people, whose 800 members include student group tour operators, travel suppliers, and destinations. In 2016, the association produced the Student & Youth Travel Digest, a qualitative study of the social effects on travel in young people. The global survey respondents included student tour operators, educators and administrators of student travel. SYTA is seeking partners, sponsors and advocates to increase the size and reach of the 2026 Student & Youth Travel Digest. Please contact Carylann Assante, CAE at cassante@syta.org to join this important landmark study.

THANK YOU

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

STRATEGIC PARTNERS

PREMIER PARTNERS

CORPORATE PARTNER

THOUGHT LEADER PARTNERS

www.syta.org

www.bonard.com