



Student & Youth Travel Digest

A COMPREHENSIVE SURVEY OF THE STUDENT TRAVEL MARKET



OVERVIEW

RESEARCH INTRODUCTION

For young people, travel is an education in itself. It helps them build self-esteem, independence, tolerance and cultural understanding, while breaking down barriers detrimental to a child's personal, educational and social development. Patterns and habits embraced when traveling at an early age are known to influence future decisions.

The benefits of travel go beyond education. Increasingly, governments and businesses are recognizing the positive effects of youth travel as a powerful ingredient that promotes economic development, job fulfilment and cultural understanding. A great deal of the knowledge around the impact of travel, however, has been recognized as anecdotal.

The fundamental ingredient — hard data — was either missing, or partial and incomplete in nature. The underdocumented nature of the sector created a need for quantifiable data and meticulous research; research that would not only measure the volume of the student and youth travel market, but also its contemporary features and future potential.

The Student & Youth Travel Association's passion, far-reaching vision and mission to increase access to travel for the student and youth market prompted the investment in this major research initiative. Thus in 2012, SYTA began collecting data for the Student & Youth Travel Digest.

To secure a global scope and adhere to the highest research standards, SYTA and its publication, Teach & Travel Magazine, partnered with StudentMarketing, an independent market specialist in international student travel and a UNWTO Affiliate Member, with individual membership in ESOMAR World Research.

As a landmark research project in global student group travel, Student & Youth Travel Digest encompasses and maps three types of mobility: domestic student travel (within the U.S.), outbound travel from the U.S. and inbound travel to the U.S.

The focus was placed on educational group travel, while sport travel and religious travel, other significant and impactful types of student group trips, were not excluded from the responses. As they were not the primary focus, they were not fully measured and analyzed.

This overview highlights the underlying findings of this important new study, and finally quantifies the size, effect

and value of the student travel market in three ways:

First — and for the first time — it offers a reliable measurement of the sector, thanks to a robust research sample representing more than 1,162,000 students, 51 U.S. states and 70 countries. This will help tour operators and travel planners understand the size and performance of the sector, preferences of students in terms of destinations, programs, travel dates, lengths of stay, group size, planning stages, lead times, accommodation, trip price levels and spending patterns. This business intelligence will aid in future planning by providing the tours that educators, students and parents want.

Second, as SYTA members are important in facilitating domestic and international incoming and outgoing mobility worldwide, this research will assist them in creating value for young travelers. It will also enable SYTA members to benchmark their activities, to further expand or develop their itineraries.

It is also an invaluable resource for anyone with an interest in student travel: teachers, group leaders, mainstream tour operators, suppliers and student organizations. Moreover, it has direct relevance to those looking to gain a more detailed insight into the youth and student travel market, raise industry standards and contribute to the industry's advancement.

Finally, it provides the sector with hard data that can be used as a foundation for lobbying, advocacy and funding purposes.

This is the first step in truly understanding the significant effect travel can have on our youth, helping them to maximize their education, prepare them for valuable jobs and encourage educated cultural exchange.

SYTA would like to thank all those who supported this project. Without their passion and dedication to the industry this would not have been possible.

This Student & Youth Travel Digest Overview introduces a series of five reports that provide more detailed information on this topic. All reports will be published through 2016/2017.

Carylann Assante

Carylann Assante, CAE
Executive Director, SYTA

Kasie Smith

Kasie Smith
Publisher, Teach &
Travel Magazine

RESEARCH METHODOLOGY

This study draws from a global survey conducted from August 2013 to November 2015.

Different target groups were approached to collect a range of empirical evidence, from how travel impacts a young person's development to top worldwide destinations for student group travel. Inputs from teachers, group leaders and tour operators led to unique comparisons and to complementary insights.

The design of the survey instrument itself reflected an initial scoping exercise (via secondary research), feedback from major industry stakeholders (comment period) and market testing, prior to staged distribution to prospective respondents.

In total, 2,143 responses were collected, making it one of the most robust quantitative insights into student group travel.

In terms of inclusion of teachers and group leaders from all backgrounds (e.g. school type, school location), due care and attention were paid to secure a representative sample. A sample that not only closely mirrored actual geographical representation of U.S., but also included insights from those not involved in organizing student travel.

To supply an international perspective, and in addition to data provided by U.S. tour operators, data was sourced from tour operators from 70 countries, who provided insights on international student groups coming to the U.S.

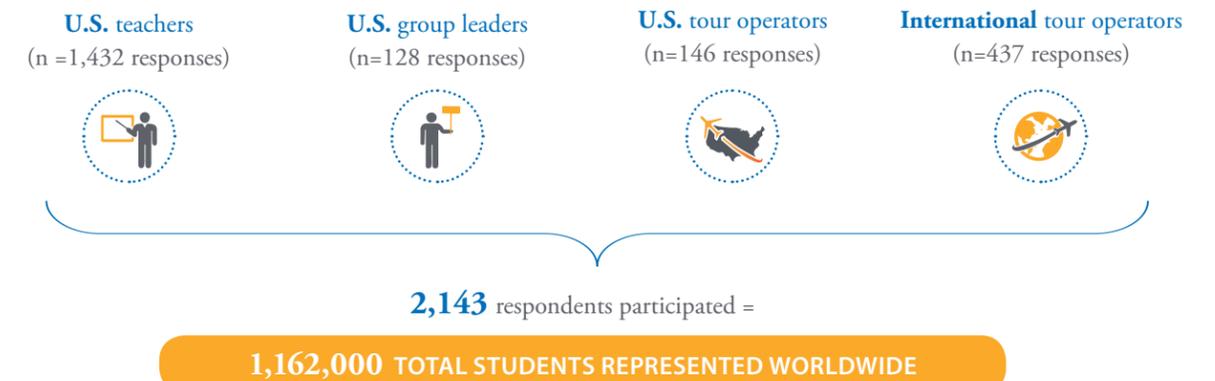
For research purposes, the process further involved standardization — the development of a universally applicable definition of a student group trip:

“A journey undertaken by a group of at least two unrelated people, usually classmates or peers, traveling out of their local area or day-to-day environment on the same dates and following the same itinerary. Such groups are often led and pre-organized by a teacher or group leader, largely to enrich their in-class or training experience (school trips), by experiencing/performing in/visiting a new environment with new experience/observation/relaxation. Extracurricular groups fall under this definition, too. Examples: school trips, marching bands, orchestras, drama clubs, choirs, church groups, sports teams, fraternities and special needs groups.”

The research was conducted in compliance with the ICC/ESOMAR Code and ESOMAR World Research Guidelines.

SYTA and StudentMarketing would like to acknowledge all survey participants who, through their time and information, contributed to this research.

In addition to direct outreach by SYTA and StudentMarketing, these organizations helped redistribute the survey: American Council on the Teaching of Foreign Languages (ACTFL), Association For Middle Level Education (AMLE), MCH Strategic Data, MTD Research, National Association For Music Education (NAfME) and Teach & Travel magazine.



SOCIAL IMPACT: WHY STUDENTS TRAVEL



74% of teachers believe travel has a very positive impact on students' **personal development**.

56% of teachers believe travel has a very positive impact on students' **education and career**.

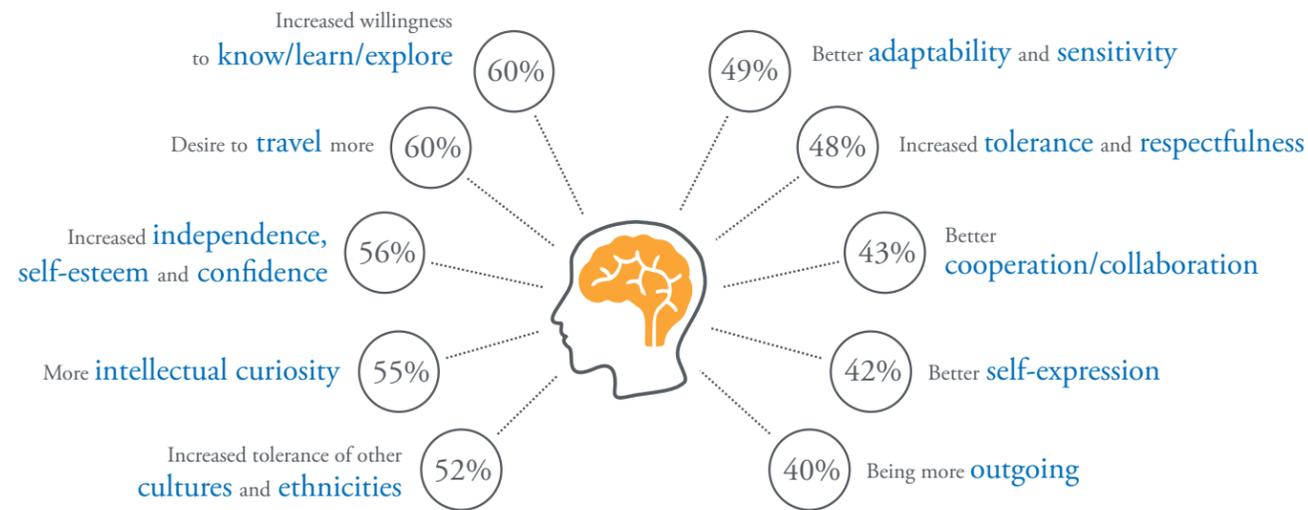
The experience of travel outside of one's own immediate environment provides an exceptional opportunity for youth to gain new life perspectives and become more culturally aware. In fact, 79% of teachers reported that one of the reasons why they organize school trips is to broaden students' horizons.

In the current globalized world, travel also represents a vital learning experience for students, and not simply a luxury. It brings the lessons of the classroom to life, providing relevance to

today's society where learning is experiential and academic. 69% of teachers organize travel because they appreciate the out of class experience it presents for their students.

The vast majority of teachers confirm that travel directly influences the understanding of curricula (53%), and positively impacts students' performance at school (54%). **As the research demonstrates, the implications of the social impact of travel are enormous, manifesting themselves in early stages of life.**

» SOCIAL IMPACT OF STUDENT TRAVEL – TOP 10 EFFECTS



The profound and instant effect of a travel experience on the performance of young people, inside and outside of an education system, helps boost their personal development.

develop higher ambitions to know, learn and explore. Students are also more aware of themselves and prone to future travel.

The majority of teachers surveyed (60%) state that student travel triggers a transformation, as a part of which students

In addition, learning about new cultures has one of the most effective impacts on young people, as teachers observed that it increases tolerance and respectfulness.

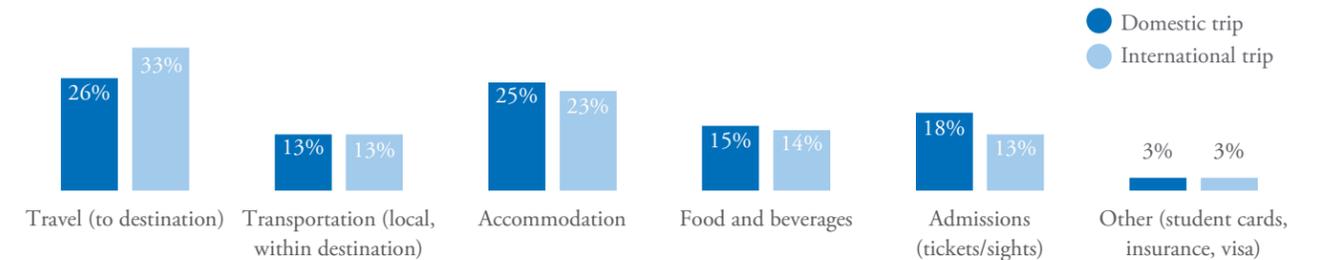
ECONOMIC IMPACT



The overall market value (total expenditures) of U.S. student group travel is estimated at a minimum of US\$5.6 billion. This figure equates to a considerable impact on the economy, once job creation and tax revenues are also taken into account. The importance of student trips can therefore be measured not only

through social implications, but also through their economic value. Students traveling between the ages of 10 and 18 are likely to return to the destination later in their lives. Hence, they represent valuable repeat customers with the desire to expand their travel experiences even further.

» STUDENT TRAVEL MARKET SPENDING BREAKDOWN



When looking at the barriers that hinder further growth of student travel, the research identified a significant gap between the lack of finances and other existing obstacles, such as restrictions imposed by schools. Similarly, 76% of teachers

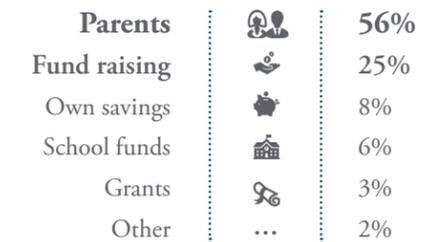
who organize school trips strongly agree that financial resources represent the main barrier. Feedback from teachers also revealed a need for tools mitigating risk connected to student travel and absence of fundraising mechanisms.

» BARRIERS TO TRAVEL ACCORDING TO TEACHERS WHO DO NOT ORGANIZE STUDENT TRAVEL



» SOURCES OF FUNDING

While parents still remain the main source of student travel funding, 1 in 4 trips is covered through fundraising. This underlines the importance of having fundraising mechanisms in place. Schools themselves fund 6% of student trips. Overall, fundraising, school funds and grants represent a crucial support apparatus for families on low incomes and provide an opportunity for all students to participate in the travel experience.



CHARACTERISTICS OF DOMESTIC AND OUTBOUND TRAVEL



Student travel is not a new phenomenon. It now represents a sizeable aspect, visible in many schools, families and extracurricular groups. Put simply, student travel has become a more integral part of student life itself.

The demand for student travel is predicted to grow. This is also due to the fact that **81% of teachers who organize student group travel claim their schools support school trips.** Even teachers who do not organize school trips claim the same (76%).

- A U.S. educator teaches **147** students on average.
- U.S. teachers organize an average of **1.7** school trips per year.
- On average, a U.S. teacher travels with **59.7** students per year.
- **28%** of students who travel take more than one trip a year.

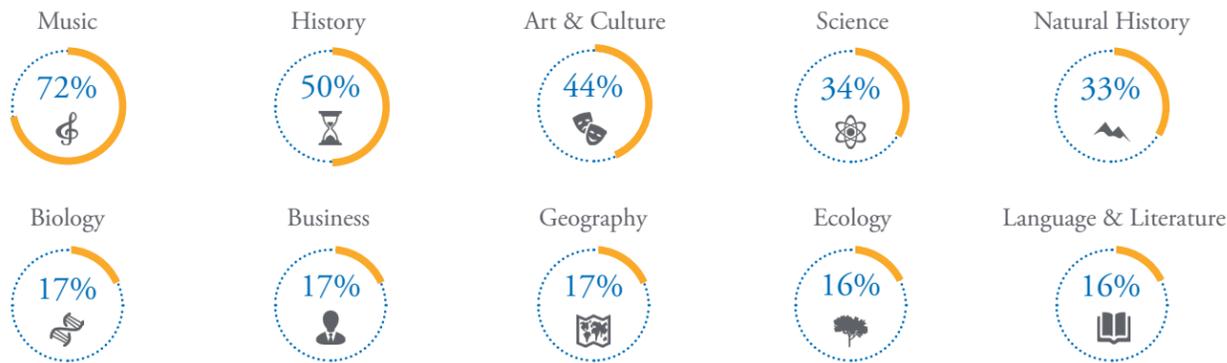
DEMAND FOR STUDENT TRAVEL IS PREDICTED TO GROW 2013/14 VS. 2014/15



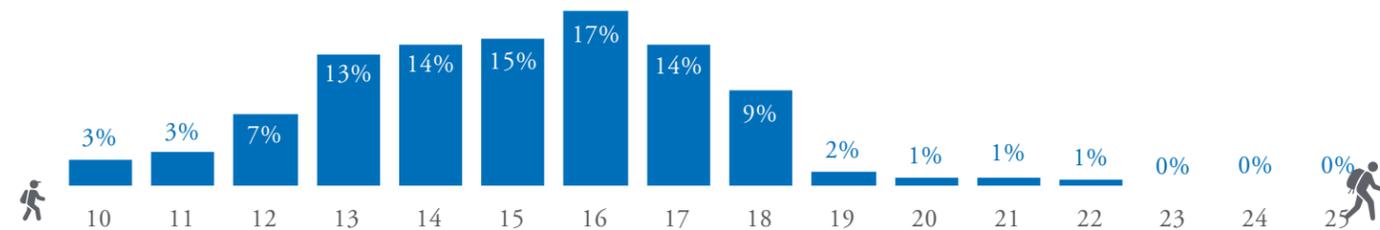
Student tours related to school curriculum are the most preferred trips among groups led by teachers and U.S. tour operators alike,

as stated by 65% of respondents. Leisure-oriented and other trip types are left far behind.

PREFERRED SUBJECTS FOR CURRICULUM-RELATED TRAVEL



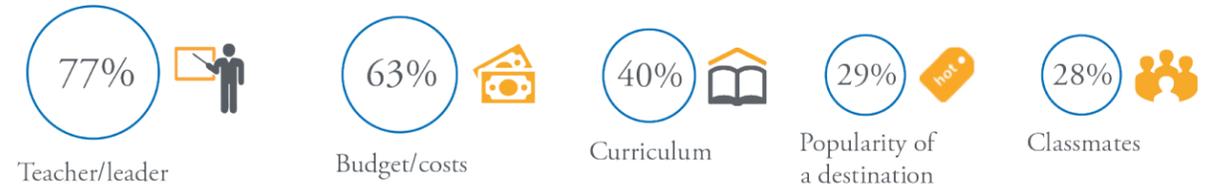
AGE BREAKDOWN



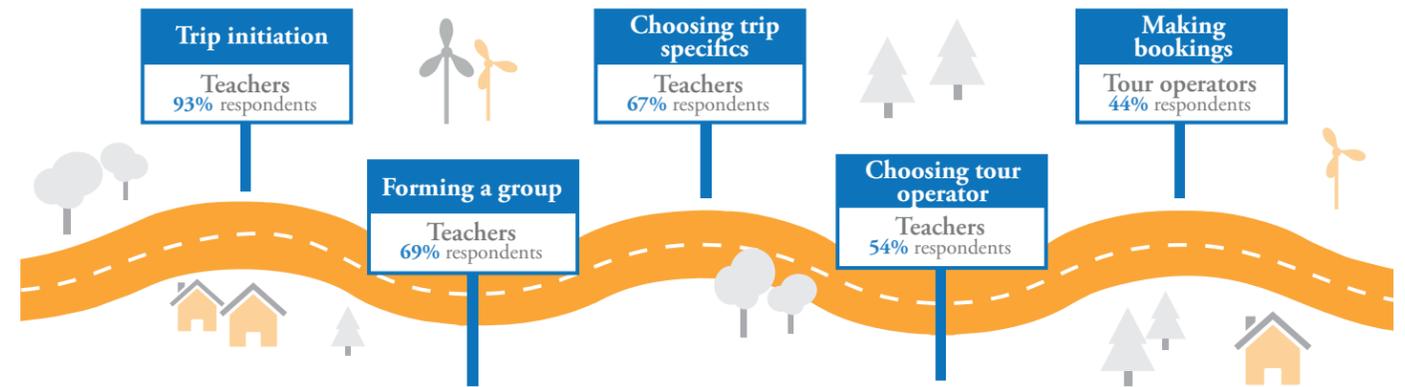
HOW STUDENTS TRAVEL



FACTORS AFFECTING THE SELECTION OF PROGRAM AND DESTINATION



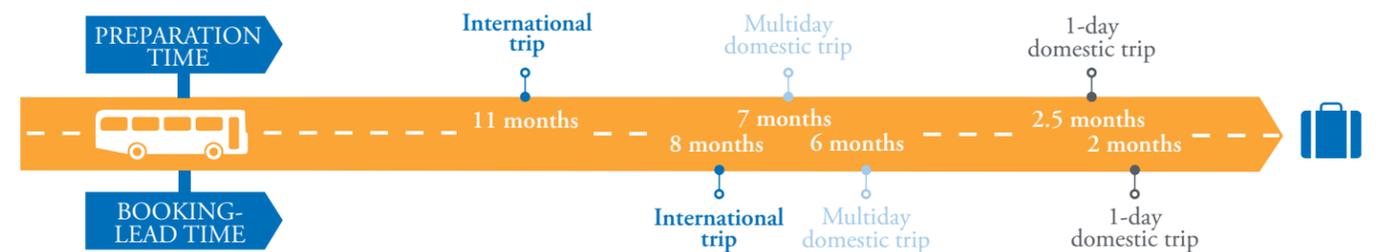
WHO IS RESPONSIBLE FOR EACH OF THE TRIP PLANNING STAGES



WHEN ARE TRIPS PLANNED AND BOOKED

The input from teachers in trip preparation is significant, however, the usage of tour operators is also strong. Teachers are responsible for selecting a tour operator in most cases and cover the initial stages of trip planning and preparation, while tour operators step in at the arranging insurance coverage and booking stage (transportation, accommodation etc.).

Considerable lead time is required for planning purposes, even for day trips. Research showed a notable gap between the start of trip preparation and booking-lead time. This is also due to the fact that 39% of student trips are customized (where more than 50% of the itinerary is adjusted) and require more complex coordination.



TRIP FEATURES

Average group leader to student ratio (1:17)

WHERE STUDENTS TRAVEL WITHIN THE U.S.



» PERCENTAGE OF TRIPS BY DESTINATION



Teachers

Within 50 miles: 34% | 5% Within state: 30% | 15%



Tour operators

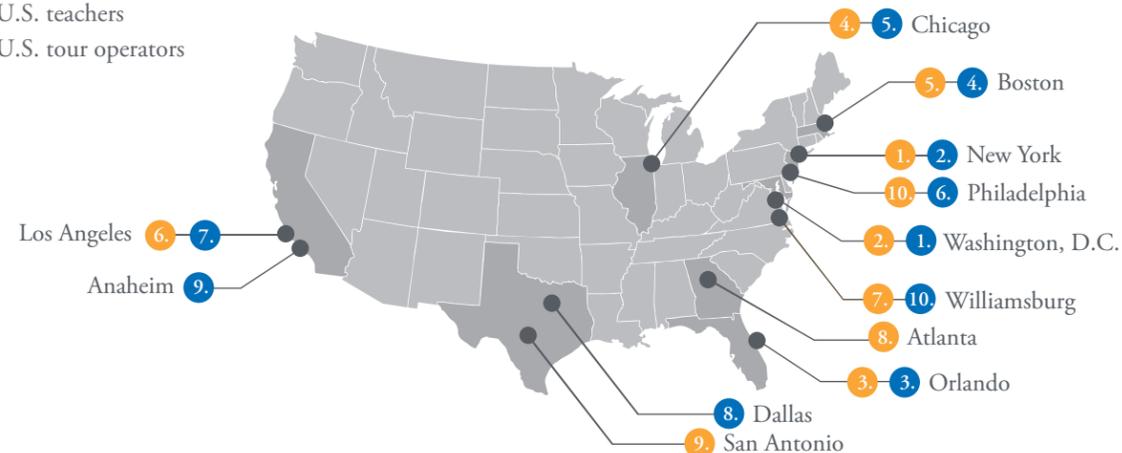
Neighboring state: 13% | 18% Interstate: 24% | 62%

Almost two-thirds of domestic trips organized by teachers end up either within 50 miles or within the state. This stems from the fact that teachers primarily organize day trips, with a focus on just one or two close destinations.

Tour operators, on the other hand, specialize in preparing and leading multiday trips. **Generally, the more long-haul the destination, the higher the usage of tour operators, where more complex logistics, preparation and experience are required.**

» MOST PREFERRED DESTINATIONS

- U.S. teachers
- U.S. tour operators



» DOMESTIC TRIP SPECIFICS



As many as 88% of trips organized by U.S. tour operators are domestic. While, to a great extent, preferences of teachers and tour operators for domestic destinations mirror each other, trip specifics differ in terms of the average group size. Teachers opt

for traveling with an approximately 20% smaller group than tour operators do. **The number of trips peaks from March to June.** December to January represents the low season for U.S. school group travel.

WHERE STUDENTS TRAVEL ABROAD



» PERCENTAGE OF TRIPS BY DESTINATION



Teachers

Europe: 66% | 52% Latin America: 18% | 13% Canada: 4% | 24% Asia: 4% | 4% Africa: 1% | 1% Other: 6% | 5%



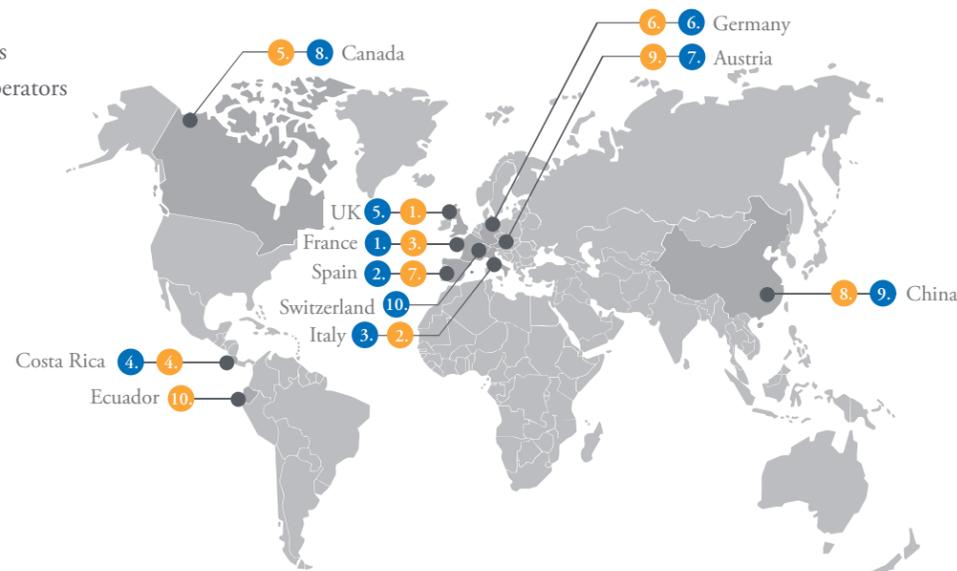
Tour operators

Trips to Europe dominate the list of U.S. student group travel destinations. This popularity of European destinations is based on the curriculum-related itinerary (European history, music, art and culture) of the majority of school trips. These destinations

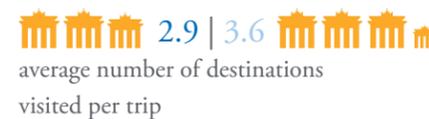
work with teachers and tour operators to prepare trip content and marketing to target the school groups. Second place in international trip choices for teacher-led visits is Latin America, while for tour operators it is Canada.

» MOST PREFERRED DESTINATIONS

- U.S. teachers
- U.S. tour operators



» INTERNATIONAL TRIP SPECIFICS



As stated by teachers, international trips tend to have stronger social impact on students than domestic ones. However, in a majority of cases their coordination is handed over to tour operators due to the more demanding

nature of their logistic requirements. Tour operators generally organize international trips with larger groups of students for shorter periods of time, and visit more destinations than those led by teachers.

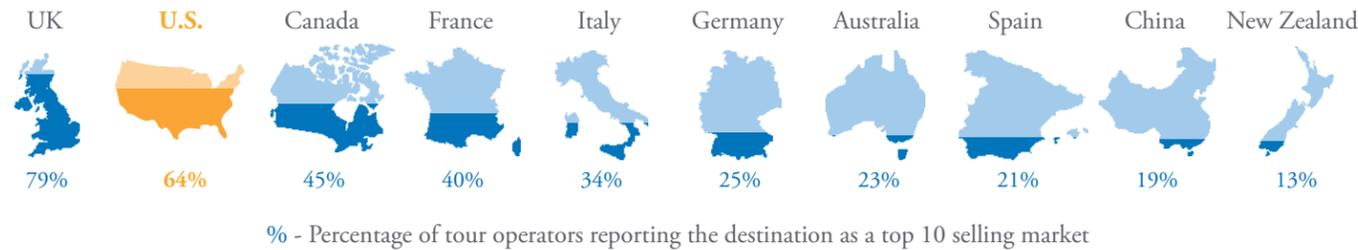
INTERNATIONAL PERSPECTIVE ON INBOUND STUDENT TRAVEL TO THE U.S.



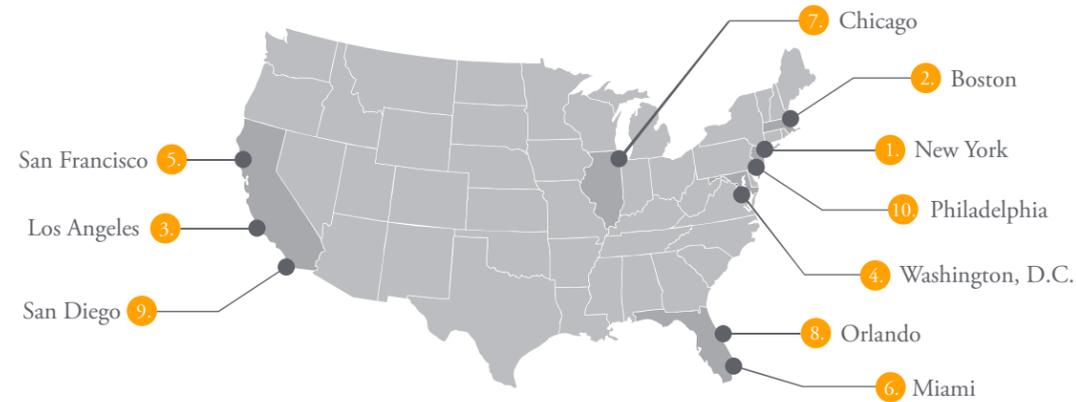
English-speaking destinations lead the global ranking of top student group travel destinations. The U.S is the second most popular destination for group trips and 64% of tour operators said

it is among the top 10 destinations they send students to. **Furthermore, tour operators from 70 countries predict a steep increase in the demand for student trips to the U.S.**

» MOST PREFERRED DESTINATIONS AND LEVEL OF POPULARITY ACCORDING TO TOUR OPERATORS WORLDWIDE

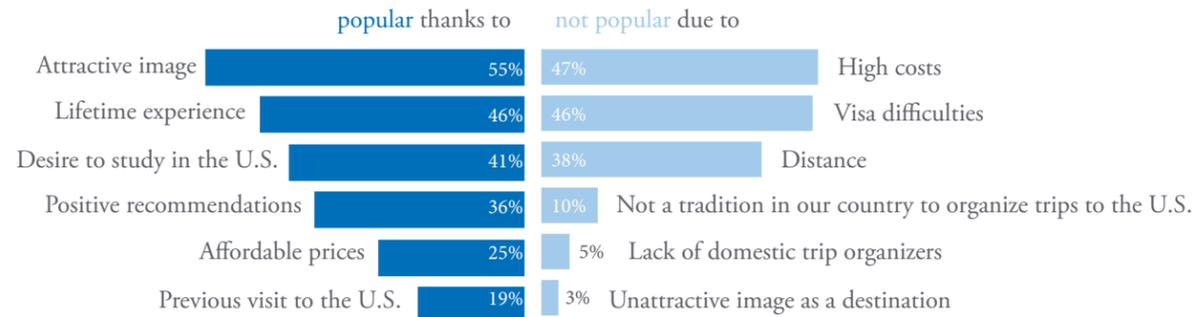


» PREFERRED DESTINATIONS OF INTERNATIONAL STUDENT GROUPS COMING TO THE U.S.



Amongst the most popular attractions of all trips are theme parks (17%), museums (17%) and landmarks (15%).

» AS A STUDENT TRAVEL DESTINATION, THE U.S. IS....



CHARACTERISTICS OF INBOUND STUDENT TRAVEL TO THE U.S.



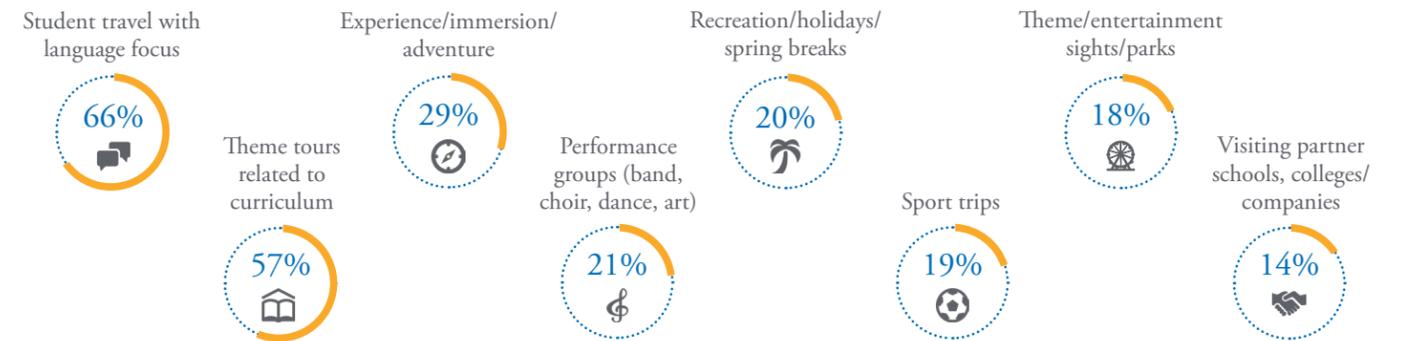
» TRIP SPECIFICS



Given the time capacity of international student travelers for overseas trips, the majority of trips to the U.S. take place in June and July, off-setting the low domestic student travel season.

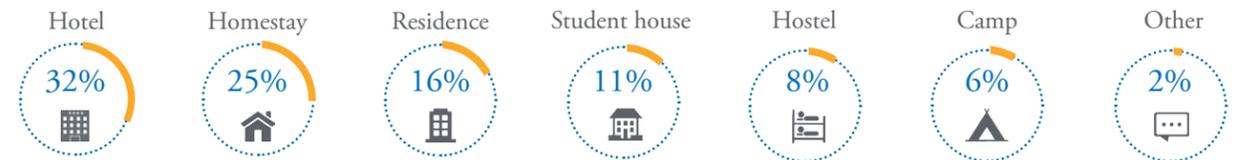
Timely marketing through appropriate and targeted booking channels (e.g. international tour operators) is crucial, as bookings for trips are normally made five months prior to travel.

» PURPOSE OF STUDENT TRAVEL TO THE U.S.



International student groups prefer programs with "content". Overall, 85% of international student groups coming to the U.S. opt for programs with an educational component; the remaining 15% come primarily for leisure purposes. More specifically, the vast majority of students come to the U.S. either to improve their English language skills as part of their trip, or to enhance their curriculum via a travel experience.

» PREFERRED TYPE OF ACCOMMODATION



» AVERAGE PRICE OF A STUDENT TRIP TO THE U.S.



The price includes all transportation, meals, accommodation, insurance and admission fees.



Student & Youth Travel Association (SYTA) is the nonprofit, professional trade association that promotes student and youth group travel. It seeks to foster integrity and professionalism among student and youth travel service providers. SYTA members play an important role in facilitating both domestic mobility and international incoming and outgoing mobility, worldwide. As the voice of student and youth travel, SYTA represents U.S., Canadian and international tour operators, group travel leaders, travel agencies, destinations and other student travel suppliers.

www.syta.org/research



The **SYTA Youth Foundation** is the 501(c)(3) philanthropic sister organization of the Student & Youth Travel Association (SYTA), formed in 2000. The purpose of SYF is to create ongoing awareness and assistance programs for the direct benefit of youth. The SYTA Youth Foundation's (SYF) mission is to impact students and youth through travel experiences that change their lives.

www.sytayouthfoundation.org



Teach & Travel — **The Official Publication of SYTA** — is educators' #1 source for everything they need to successfully initiate, organize, and conduct tours for their students. Published five times a year, Teach & Travel provides the most up-to-date information on industry news, travel requirements, fresh destination ideas, and smart planning tips.

www.teachandtravelmagazine.com



StudentMarketing is a youth travel consultancy that specializes in data analysis and business solutions across youth, student and educational travel markets, while the core services include market research, market intelligence and business solutions.

www.student-market.com

CONTACT DETAILS: SYTA and SYTA Youth Foundation, 8400 Westpark Drive Mclean, Virginia 22102
www.systa.org | info@syta.org | (1) 703.610.1263

Copyright © 2016 Student & Youth Travel Association *All rights reserved. The contents of the Student & Youth Travel Digest may not be photocopied or reproduced or redistributed without the written consent of SYTA.*



ALBUQUERQUE CONVENTION & VISITORS BUREAU • AON • BLUE MAN GROUP • BRANSON LAKES AREA CVB • BROADWAY INBOUND • CEDAR FAIR ENTERTAINMENT COMPANY • DISNEY THEATRICAL GROUP • DISNEY YOUTH PROGRAMS • EMPIRE STATE BUILDING EXPERIENCE • GROUP OFFICE BOX SALES / BROADWAY.COM
 MCH STRATEGIC DATA • MERLIN ENTERTAINMENTS PLC • OUE SKYSPACE LOS ANGELES • ONE WORLD OBSERVATORY • UNIVERSAL ORLANDO RESORT • VISIT ORLANDO

