SYTA
The Voice of Student & Youth Travel®

Student & Youth Travel Digest

A COMPREHENSIVE SURVEY OF THE STUDENT TRAVEL MARKET

Teach&Travel The Official Publication of SYTA

SYTA The Voice of Student & Youth Travel®

syta youth foundation Travel Changes Young Lives for Good

PART 4: U.S. STUDENT GROUP TRAVEL LED BY TOUR OPERATORS

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 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, government and businesses are recognizing the positive effects of youth travel as a powerful life experience that promotes economic development, job fulfilment and cultural understanding. A great deal of the knowledge around the impact of travel, however, has been anecdotal — until now.

The fundamental ingredient for proving the benefits of youth travel — 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 launched its *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, however sport travel and religious travel and other impactful types of student group trips, were not excluded from the responses. Yet, as they were not the primary focus, they were not fully measured and analyzed.

Part 4: U.S. Student Group Travel Led by Tour Operators

This report, which presents inputs from U.S. tour operators, concludes the first edition of the *Student & Youth Travel Digest*. The previous issues analyzed student group travel and its characteristics, as reported by U.S. teachers and international tour operators.

Specialized student tour operators play an important role in organizing student travel. Generally, the more complex the trip preparation, the more likely a tour operator will be involved in facilitating the student travel experience.

Data from student tour operators — the most versatile travel organizers — provides an unparalleled insight into the student group tour market. This report, therefore, is a benchmark for tour operators and for the broader travel community.

Among the key findings:

- **The average age of a student group traveler is 15 years.**
- **U.S. tour operators, when compared to teachers, organize international trips composed of larger groups of students (43 versus 27), and visit more destinations in one trip (3.6 versus 2.9).**
- **Multiday domestic trips organized by U.S. tour operators last 4.1 days on average; international trips run 8.8 days on average.**

SYTA appreciates the contribution of all respondents, and by releasing the *Student & Youth Travel Digest* series believes in providing a valuable tool to all who, in any way, engage in the student group travel market.

Carylann Assante

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Kasie Smith
Publisher, *Teach & Travel* magazine

RESEARCH METHODOLOGY

The data in this report was sourced as a part of global survey conducted from August 2013 to November 2015.

The *Student & Youth Travel Digest U.S. Student Group Travel Led by Tour Operators* report summarizes the insights and experience of 146 U.S. travel companies from 34 states. Respondents represent over 800,000 students, and account for approximately 25% of all U.S. tour operators, whose primary business is the organization of student group travel.

Despite respondents having experience with various age groups, the main focus of this report is on students aged 10-18. Respondents participating in this survey were prompted to provide data related to this particular age group alone.

In addition to analyzing responses from U.S. tour operators, the report further introduces comparisons to U.S. teachers as well as international tour operators and their observations of student group travel.

Information in this report is presented in this manner:

- Respondent profile
- Student group travel volume
- Trip specifics
- Trip preferences
- Economic value
- Trip organization process

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 by StudentMarketing, an independent market specialist in international student travel and a UNWTO Affiliate Member, in compliance with the ICC/ESOMAR Code and ESOMAR World Research Guidelines.

SYTA, *Teach & Travel* magazine 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, MTD, National Association for Music Education (NAfME) and *Teach & Travel* magazine.

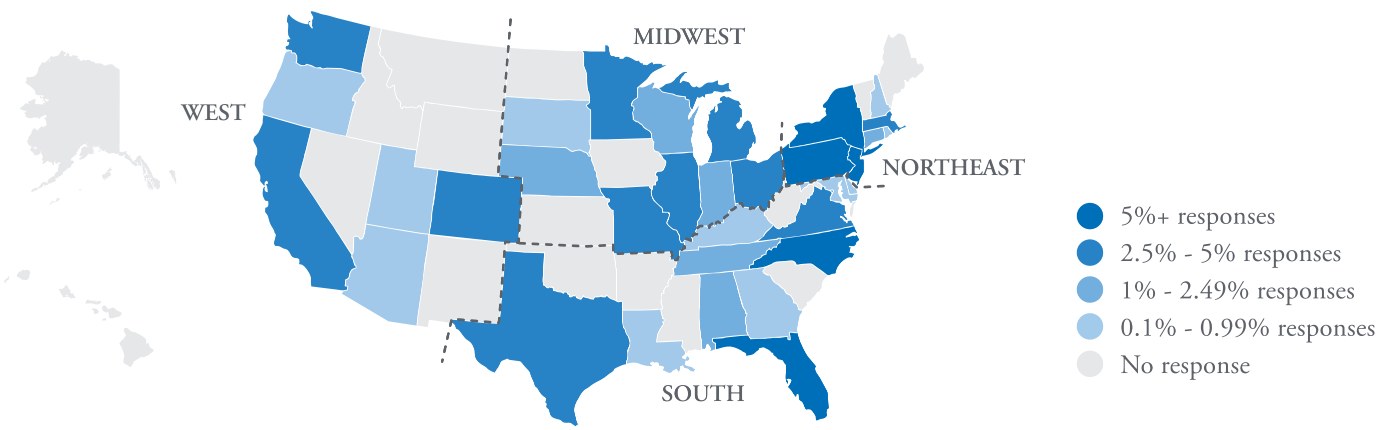
RESPONDENT PROFILE

This report draws conclusions from a diverse group of U.S. organizations providing travel experiences to student groups.

A total of 146 companies participated in this survey — a figure that includes approximately 25% of all U.S. tour operators organizing student group travel. The responses came from participants based in 34 states.

The respondent pool principally consists of tour operators (79%), followed by student agencies (16%), travel agencies (4%) and general sales agents (1%).

» RESPONDENTS BY STATE



TOP 10 RESPONDENT STATES: Florida (11.1%), New York (9.7%), New Jersey (5.6%), North Carolina (5.6%), Pennsylvania (5.6%), Illinois (4.9%), Massachusetts (4.9%), Ohio (4.9%), Texas (4.9%), California (4.2%).

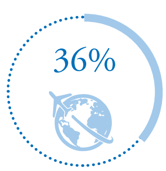
» RESPONDENTS BY CATEGORY

Definitions

Student tour operator

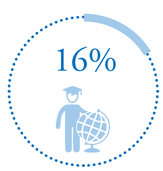
= a specialized tour operator, the majority of whose business (three-quarters) is from student travel.

Tour operator



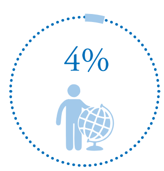
= an organization that makes travel arrangements including organizing tours or trips, and creating package holidays.

Student agency



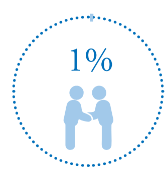
= an organization that promotes student travel programs put together by tour operators and other student travel organizers.

Travel agency



= an organization that promotes general travel and tourism-related services put together by tour operators and other travel organizers.

General sales agent

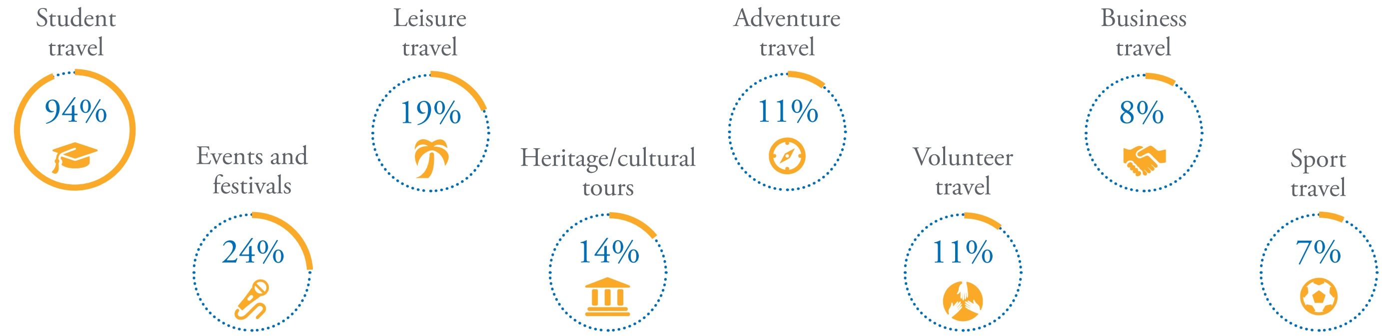


= a sales representative for an airline in a specific country or region.

Note: In the report, respondents from all categories will be referred to as "tour operators."

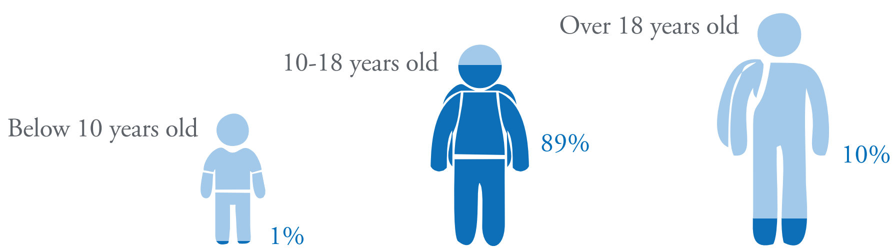
RESPONDENT PROFILE

» **RESPONDENTS** BY MAJOR SECTOR OF TRAVEL THEY REPRESENT



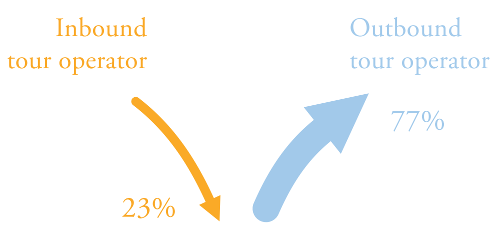
*Multiple Choice Question

» **RESPONDENTS** BY PRIMARY AGE GROUP THEY SERVE

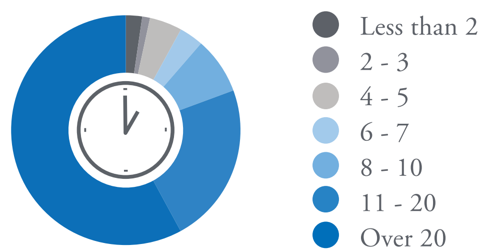


For 94% of all participants, student travel represents a major sector of travel they operate in. At the same time, the core business for 89% of respondents is organizing travel for customers aged 10-18.

» **RESPONDENTS** BY MAJOR BUSINESS TYPE



» **RESPONDENTS** BY EXPERIENCE (YEARS) OF ORGANIZING STUDENT GROUP TRAVEL



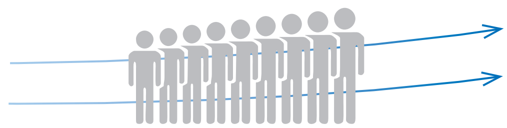
Of the respondents, 58% have been organizing student group travel for over 20 years. Both the relevance and the length of their experience make U.S. tour operators suitable and skilled respondents, capable of capturing all aspects of student group travel and sharing their knowledge and experience.

VOLUME OF STUDENT GROUP TRAVEL

» AVERAGE NUMBER OF STUDENT TRIPS ORGANIZED AND STUDENTS SENT ON A TRIP PER YEAR BY A U.S. TOUR OPERATOR

2012/13

110 student groups sent with 6,126 students



2013/14

111 student groups sent with 6,424 students

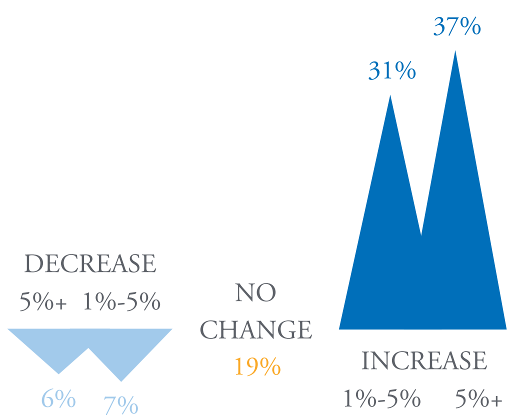
An average U.S. tour operator caters to 111 student groups per year. While the number of trips remained stable, the number of traveling students increased by 5% over the two academic years measured. This increase translated to a larger average group size.

» TRIPS BOOKED BUT NOT REALIZED 2013/14

Pushed back 9%

Canceled 10%

» PREDICTION OF FUTURE DEMAND FOR STUDENT TRAVEL 2013/14 VS. 2014/15

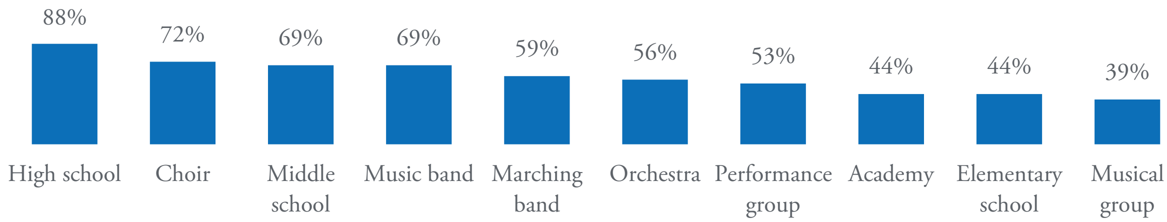


Sixty-eight percent of U.S. tour operators predicted an increase in the future demand for student travel. The positive market mood among U.S. tour operators, therefore, mirrors that of U.S. teachers and international tour operators, as presented in previous reports.

SYTA is currently in the process of updating this information for the 2016/17 academic year.

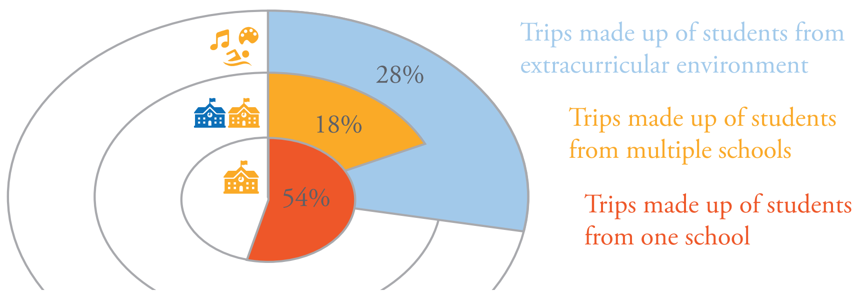
PROFILE OF STUDENTS TRAVELING WITH TOUR OPERATORS

TOP 10 INSTITUTION TYPES STUDENT CUSTOMERS ORIGINATE FROM



**Multiple Choice Question*

TRIPS BY STUDENT SOURCE ENVIRONMENT

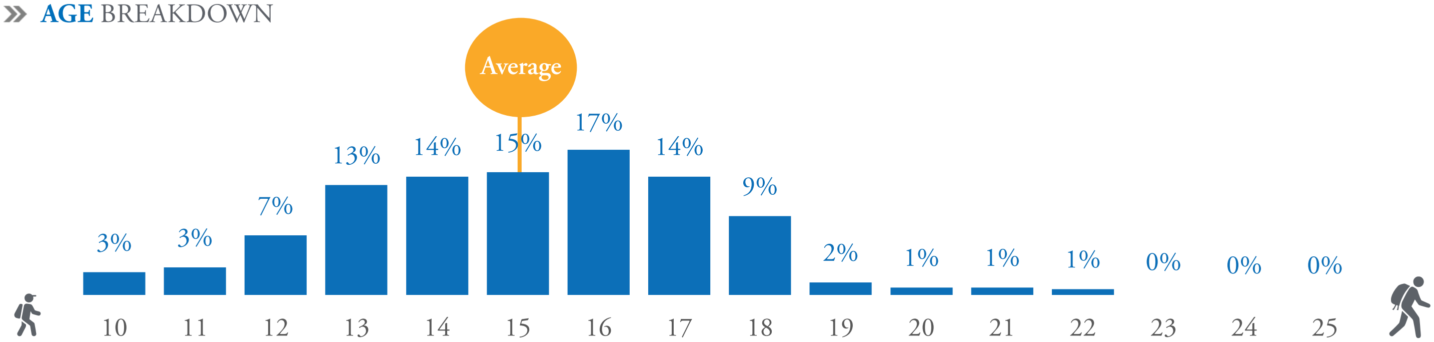


High school students represent the primary customer pool for U.S. tour operators (88%), while middle school students are served by 69% of respondents. Out of extracurricular groups, tour operators primarily travel with choirs (72%), music bands (69%) and marching bands (59%).

The groups traveling usually consist of students from one school (54% of trips). The extracurricular environment also constitutes a strong segment, representing 28% of trips.

The average reported age of a traveler is 15 years.

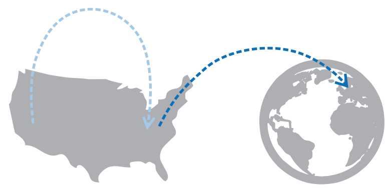
AGE BREAKDOWN



DOMESTIC AND INTERNATIONAL TRIP SPECIFICS

» **TYPES** OF PROGRAMS ORGANIZED FOR STUDENT GROUPS

35% of U.S. tour operators organize **domestic travel only**



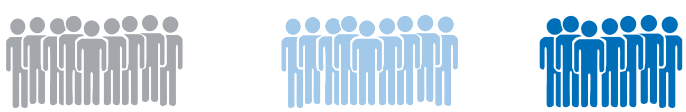
6% of U.S. tour operators organize **international travel only**

59% of U.S. tour operators organize both **domestic and international travel**

One of the research goals was to outline the portfolio of student tour operators, the majority of whom (59%) organize both domestic and international travel, while 35% supply travel itineraries only within the U.S. and 6% specialize solely in outbound trips.

Differences between the capabilities of teachers and tour operators become more noticeable when looking at international trip characteristics. Compared to teacher-led groups, tour operators accompany 43 students on an international trip (versus 27 with teachers) and 65 students on a domestic trip (versus 52 with teachers).

» **AVERAGE** GROUP SIZE



» **AVERAGE** GROUP LEADER TO STUDENT RATIO

1 : 17

Among tour operators, the most common group leader-to-student ratio on domestic trips is one to ten (leader to students), and one to six on international trips. This ratio is determined by the school, its teachers and the tour operator and supports the ability to manage a large group of students. Its influencing factors, such as students' ages, are based on safety management while traveling. According to survey respondents, which include extracurricular group travel organizers, the group leader-to-student ratio averages to 17 students per group leader. This equates to tour operators allocating, on average, four group leaders for each domestic trip and three group leaders per international trip.

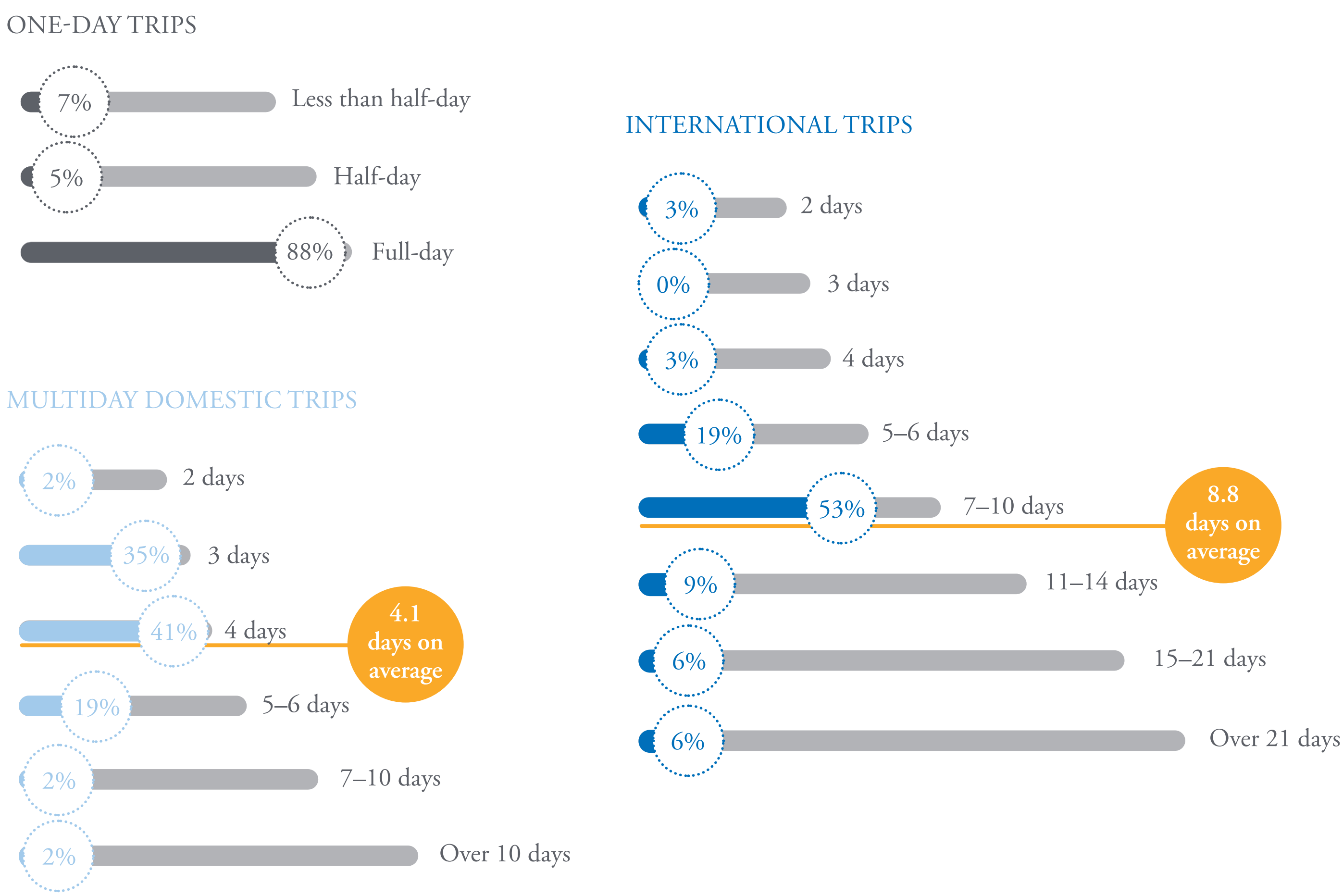
LENGTH OF STAY

One in 10 trips organized by tour operators is a domestic one-day trip. These trips are rarely shorter than a full day.

Multiday domestic trips are the most common type coordinated by U.S. tour operators. Of these trips, 94% last three to six days, with the average trip length standing at 4.1 days.

International trips led by U.S. tour operators run 8.8 days on average, with seven- to 10-day tours accounting for 53% of all international trips.

» **AVERAGE** LENGTH OF STAY BY TRIP TYPE

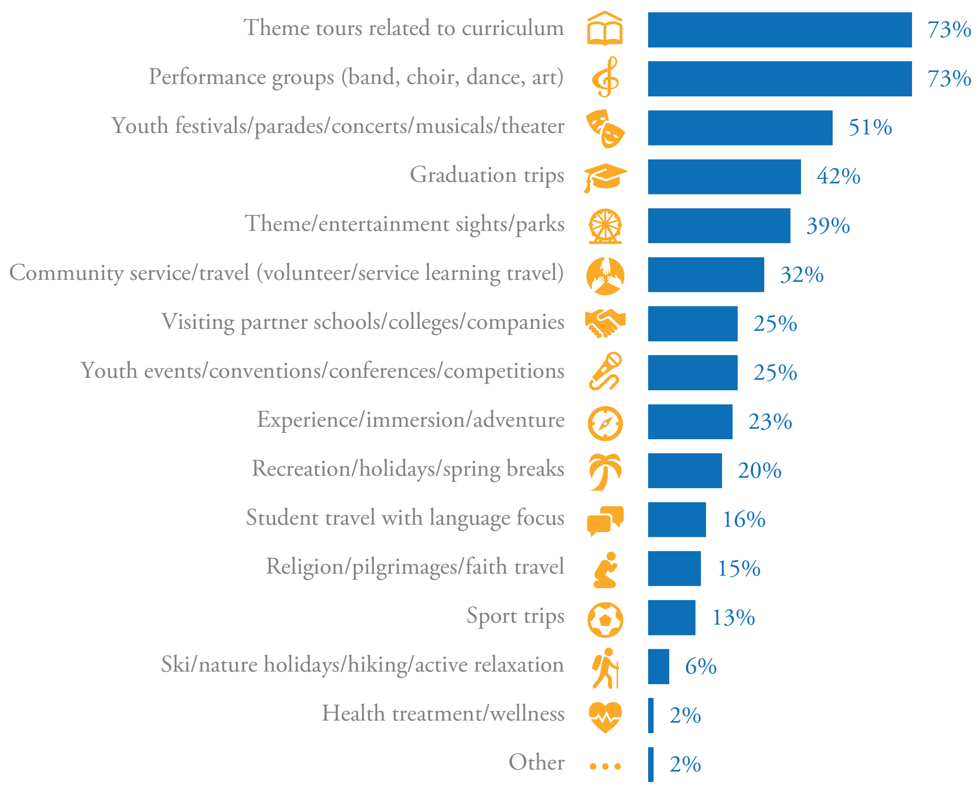


**Percentages do not add up to 100% due to rounding*

When compared to teachers, tour operators generally organize trips with larger groups, for shorter periods. At the same time, as will be shown later in the report, their expertise is demonstrated in a higher number of destinations visited per trip.

PROGRAM PREFERENCES

» TRIP PROGRAM PREFERENCES

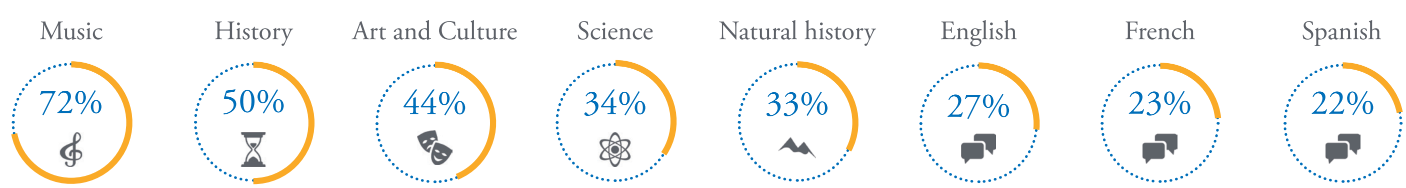


**Multiple Choice Question*

U.S. tour operators represent more versatile student group travel organizers than teachers. The information and data reported by them shows a broader and more comprehensive perspective of student travelers' program preferences, thanks to their catering increasingly to extracurricular groups.

While teachers specialize in a few selected trip types, tour operators are involved in a wider array of program types. Besides leading school curriculum-related tours (73% of tour operators), their other major focus includes organizing performance group trips (73%), youth festivals (51%) and graduation trips (42%).

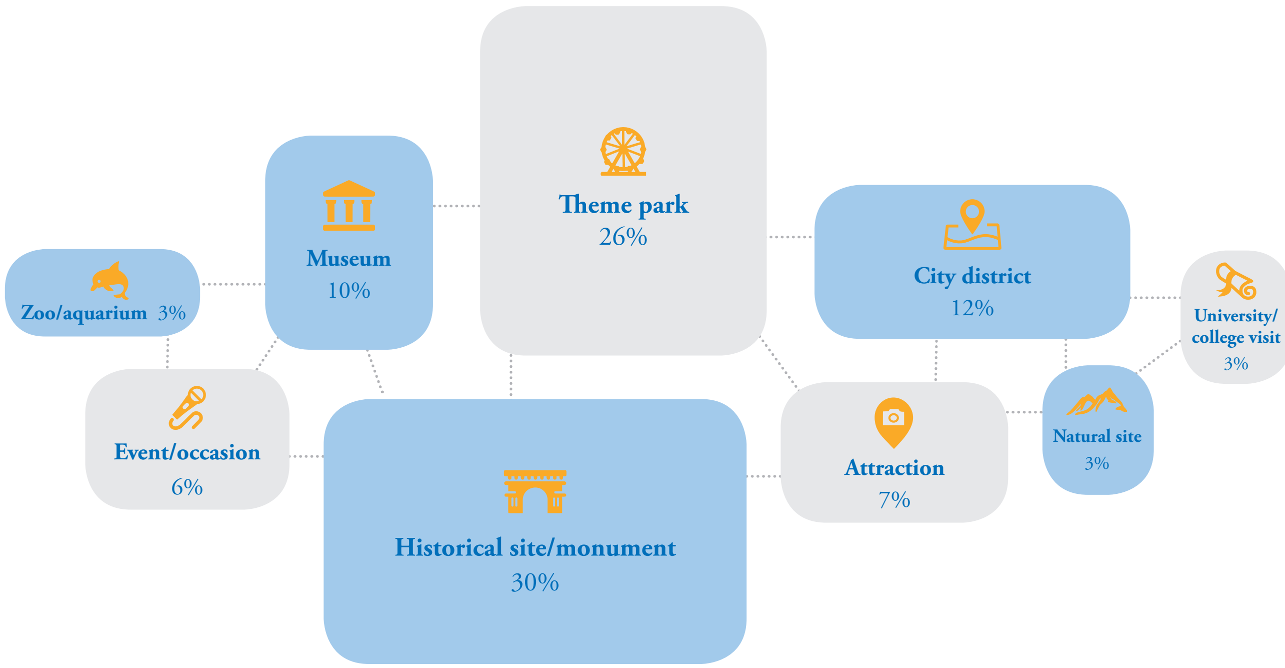
» EIGHT MOST PREFERRED SUBJECTS FOR CURRICULUM-RELATED TRAVEL



**Multiple Choice Question*

TRAVEL CONTENT PREFERENCES

» PERCENTAGE OF TRIPS BY TRIP CONTENT



Historical sites/monuments and theme parks are preferred attractions for domestic groups, significantly outnumbering other attraction types.

For international groups, on the other hand, museums, natural sites and popular city districts all receive approximately the same preference levels as monuments and theme parks.

» AVERAGE NUMBER OF DESTINATIONS VISITED ON A DOMESTIC TRIP

3.6

» AVERAGE NUMBER OF DESTINATIONS VISITED ON AN INTERNATIONAL TRIP

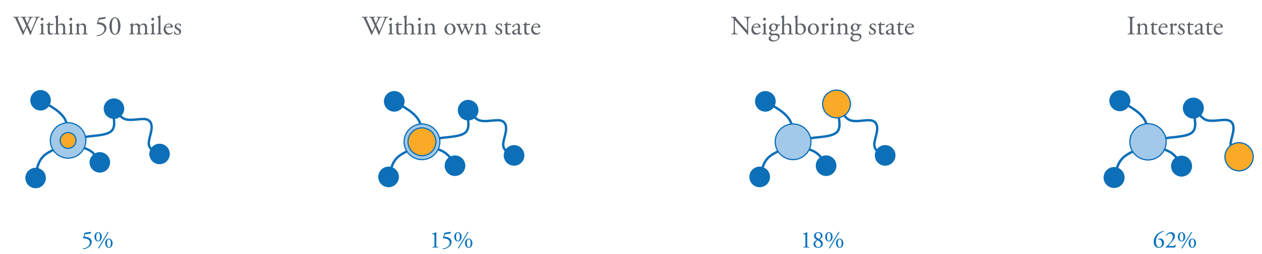
3.6

Groups with U.S. tour operators visit 3.6 destinations during an average trip. This applies to both domestic and international travel.

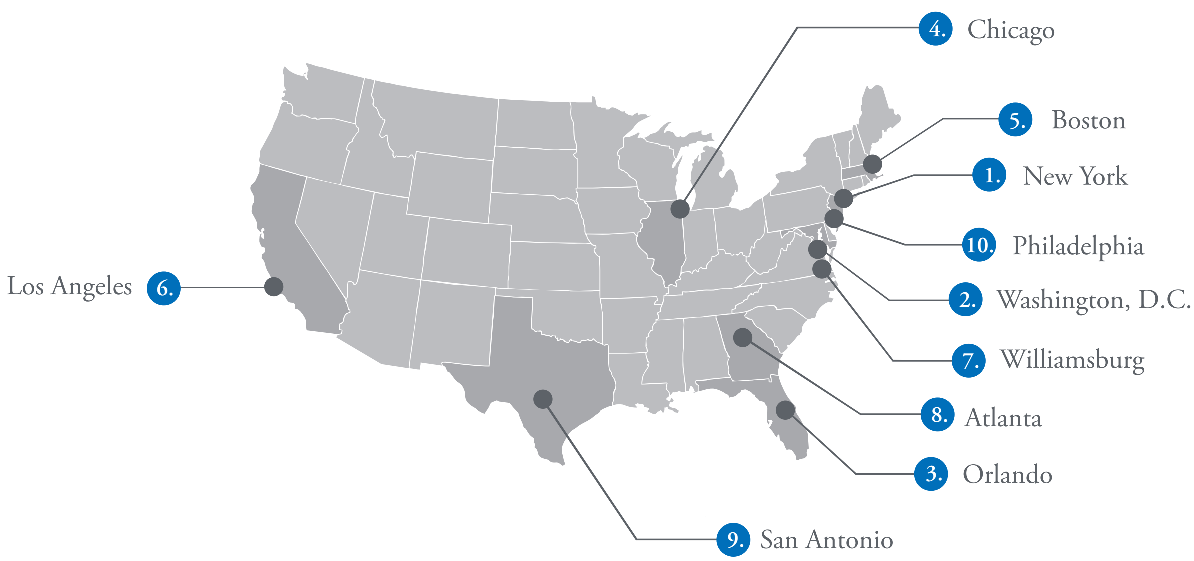
Given the average length of stay, groups explore almost one destination a day on domestic trips, while on international trips groups visit almost one destination every two days.

GROUPS LED BY TOUR OPERATORS AND DOMESTIC STUDENT TRAVEL

» PERCENTAGE OF DOMESTIC TRIPS BY DESTINATION



» 10 MOST PREFERRED U.S. DESTINATIONS ACCORDING TO U.S. TOUR OPERATORS



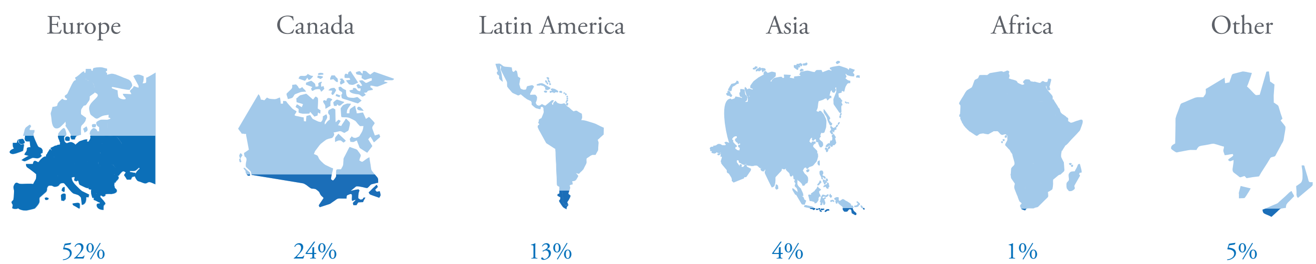
As many as 80% of domestic trips feature locations outside of students' own states. This is significantly greater when compared to groups led by U.S. teachers (37%).

The most popular destinations are primarily cities with historically significant sites/monuments, theme parks or well-known city districts (e.g., New York).

The domestic destination preferences of U.S. travel groups, organized by teachers and by tour operators, generally align. For international groups the destination choices differ, with California locations (Los Angeles, San Francisco, San Diego) and Boston ranking higher. (For more details, please refer to *Student & Youth Travel Digest: U.S. Student Group Travel Led by Teachers* and *Inbound Student Group Travel to the U.S.*)

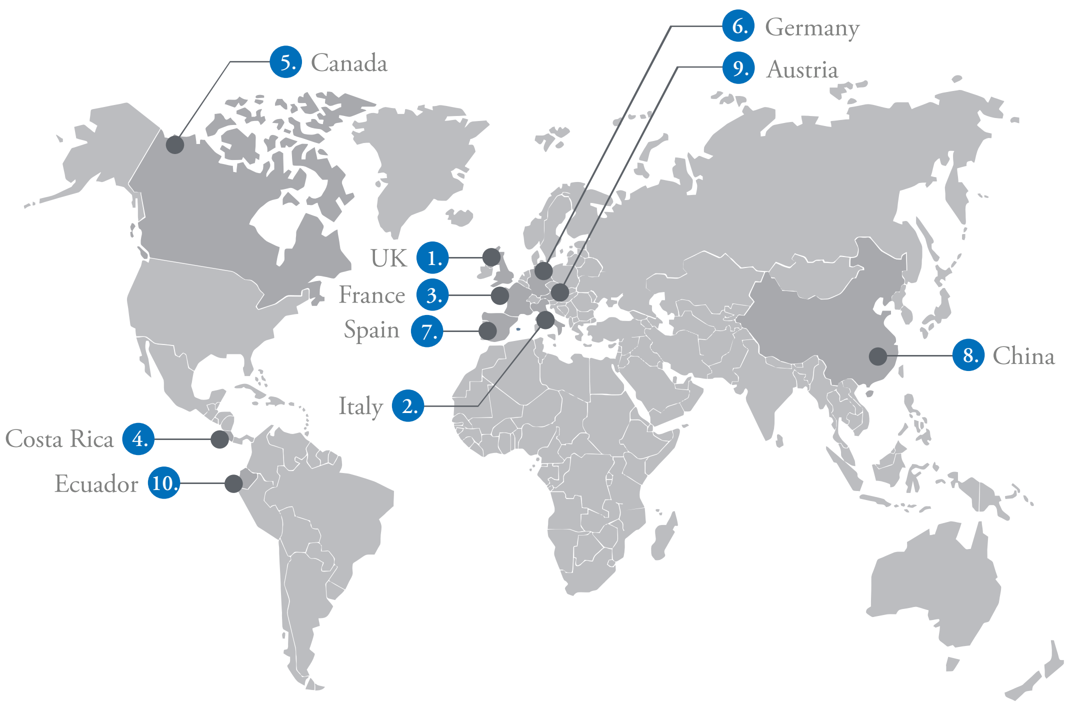
GROUPS LED BY TOUR OPERATORS AND INTERNATIONAL STUDENT TRAVEL

» PERCENTAGE OF TRIPS BY DESTINATION ABROAD



**Percentages do not add up to 100% due to rounding*

» 10 MOST PREFERRED DESTINATIONS ABROAD ACCORDING TO U.S. TOUR OPERATORS



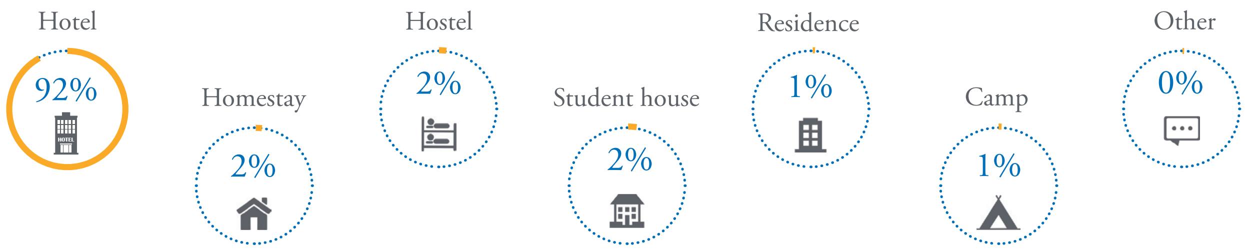
Trips to Europe are the most popular, with the UK being the overall preferred target destination.

Canada, the second most attractive destination, is far more favored by tour operators (24% of outbound trips) than with teachers (4% of outbound trips).

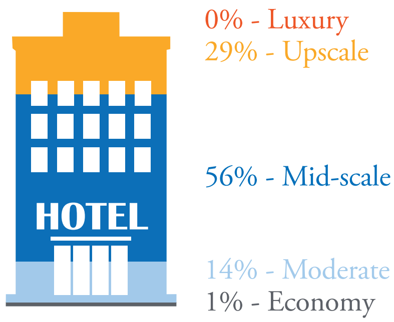
U.S. student travelers choose Latin American destinations for 13% of their trips. The relative proximity of this region is a reason for its increased popularity among U.S. student groups.

ACCOMMODATION PREFERENCES AND **SPENDING** ON STUDENT GROUP TRIP

» **PREFERRED** ACCOMMODATION TYPE



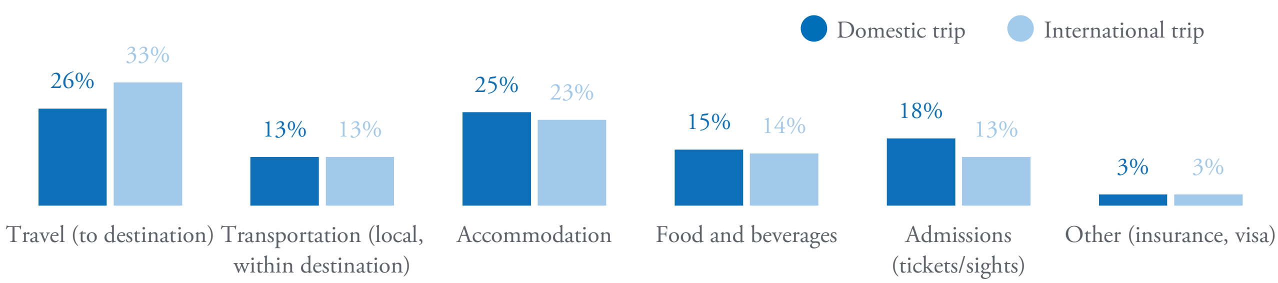
» **PREFERRED** CATEGORIES OF HOTEL ACCOMMODATION



Out of all student group travel organizers, U.S. tour operators show the strongest propensity for hotel accommodation (92%), preferring to use mid-scale and upscale hotels (85% of hotel users). Performance groups and graduating groups utilize hotels for 97% and 96% of their trips, respectively. For groups traveling to youth festivals, hotel usage is as high as 99%.

Hotel accommodation, the more expensive accommodation option, is reflected in the relatively higher trip price, mainly for international trips.

» **STUDENT TRAVEL MARKET** SPENDING BREAKDOWN



**Percentages do not add up to 100% due to rounding*

Over half of the budget for a student group trip is spent on travel and accommodation; this is true for domestic and international trips.

Travel expenses for an international trip make up one third of the overall budget. These percentages also apply to trips in general, regardless of duration or the distance to the destination.

ECONOMIC VALUE

AVERAGE TRIP PRICE

OF A DOMESTIC STUDENT TRIP

1-day trip	2-day trip	3-day trip	5-day trip	7-day trip
US$121	US$285	US$564	US$969	US$1,592

OF AN INTERNATIONAL STUDENT TRIP

1 week	2 weeks	3 weeks
US$2,398	US$3,776	US$5,709

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

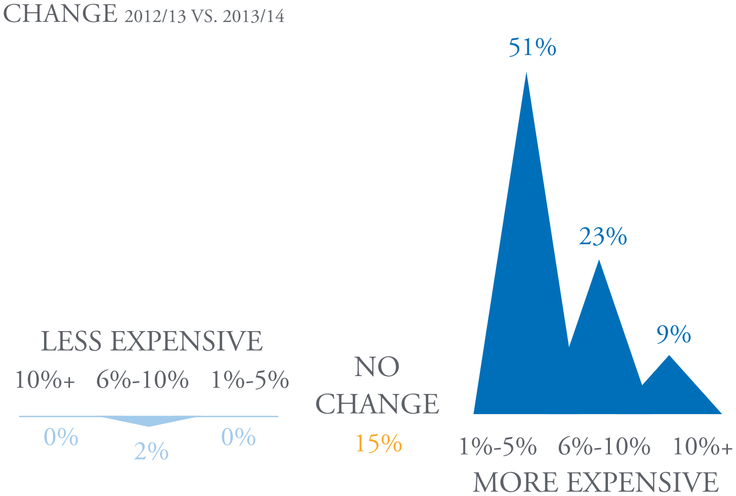
Note: Actual prices vary significantly based on trip destination, selected level of trip specifics (e.g. type and quality of accommodation), time of the year when trip takes place, time of booking, etc.

When comparing expenses of U.S. groups during a one-week domestic trip to a one-week inbound trip to the U.S. by international groups, the price (excluding flight costs) is almost identical.

Therefore, the added per-week value of an individual student group traveler to the local economy is the same for a domestic and an international traveler.

However, the overall value differs — on one side due to the higher total number of domestic students traveling within the U.S., and on the other side due to the longer trip duration by international travelers in the U.S.

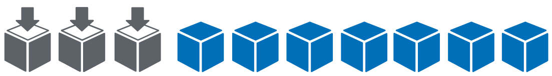
AVERAGE TRIP PRICE CHANGE 2012/13 VS. 2013/14



SELECTION OF TRIP SPECIFICS

RATIO OF CUSTOMIZED AND PREDEFINED TRIPS

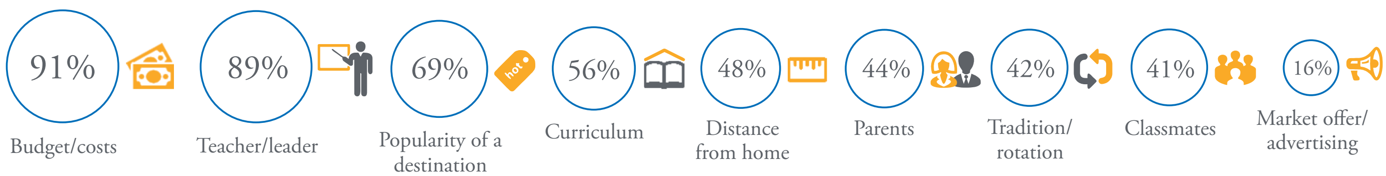
Customized trip : predefined trip



30% : 70%

Tour operators offer package programs, but are able to adjust travel arrangements to the needs and wishes of their customers. Modifications, where more than 50% of the original trip itinerary is adjusted, take place for 30% of student group trips.

FACTORS AFFECTING THE SELECTION OF PROGRAM AND DESTINATION

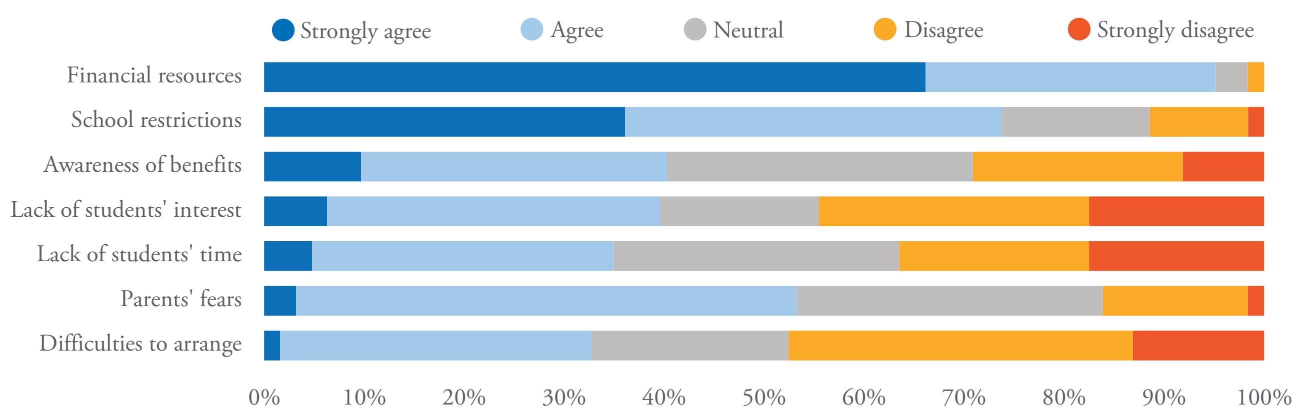


**Multiple Choice Question*

According to U.S. tour operators, financial determinants and teachers have the biggest impact on the selection of trip itinerary specifics. The popularity of a destination comes third, which highlights the importance of destinations properly marketing themselves to this target group.

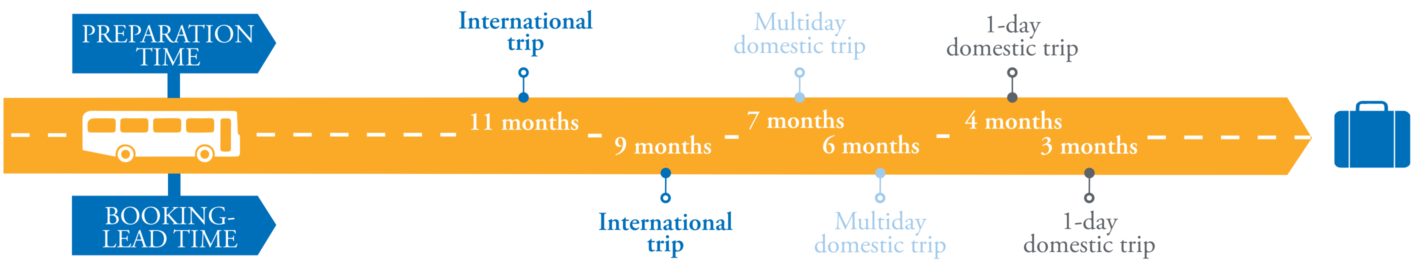
In another indicator, finances were identified as the most critical obstacle to student group travel, as reported by 95% of respondents. Among other major determinants that hinder trip execution, 74% of U.S. tour operators agree on school restrictions, followed by parents' fears (53%).

OBSTACLES TO STUDENT TRAVEL REPORTED BY U.S. TOUR OPERATORS



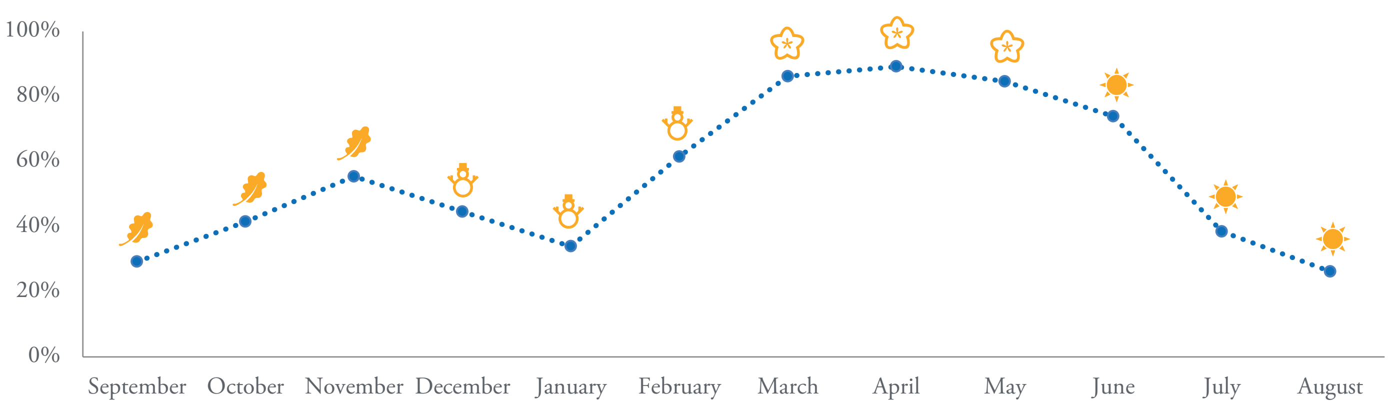
TRIP PLANNING AND TIMING

» TRIP PREPARATION AND BOOKING-LEAD TIME



The research identified and quantified considerable differences in the trip planning stage, depending on the trip type. There is a planning lead time of 12 months for every other international trip, whereas one-day trips are set up in less than one month by 30% of respondents. The planning stage is followed by the reservation stage, requiring one month for domestic trips and two months for international trips. From the moment a client contacts a tour operator, the first month of planning requires extensive communication and assistance by the tour operator to help the client make the right choices for their trip.

» PERCENTAGE OF TOUR OPERATORS LEADING STUDENT GROUP TRIPS BY MONTH



*Multiple Choice Question

The student group travel led by U.S. tour operators is primarily organized in the March to May period, with April being the most popular month for student trip execution.

When looking at reservations, January (one-day trips) and October (multiday trips) are the busiest periods for receiving bookings.

EVOLUTION OF TRIP PLANNING ACCORDING TO TOUR OPERATORS

The data below highlights the distribution of tasks in the trip organization process; it also sheds light on the standards, in terms of services provided by U.S. tour operators. It should be noted that teachers are most prominent in each stage of trip organization process, except when making bookings and arranging insurance coverage. Compared to the data reported by teachers, tour operators see themselves as being more responsible for some of those tasks.

» WHO IS RESPONSIBLE FOR EACH PLANNING STAGE OF THE TRIP, AS REPORTED BY U.S. TOUR OPERATORS

1 FORMING A GROUP

Teacher	72%
Group leader	42%
Parents	17%
Students	9%
Tour operator	9%

2 CHOOSING TRIP SPECIFICS (DESTINATIONS, ITINERARY, DATES)

Teacher	71%
Tour operator	49%
Group leader	38%
Students	25%
Parents	24%

3 PRESENTING THE TRIP TO PARENTS

Teacher	71%
Tour operator	45%
Group leader	35%
Parents	5%
Students	3%

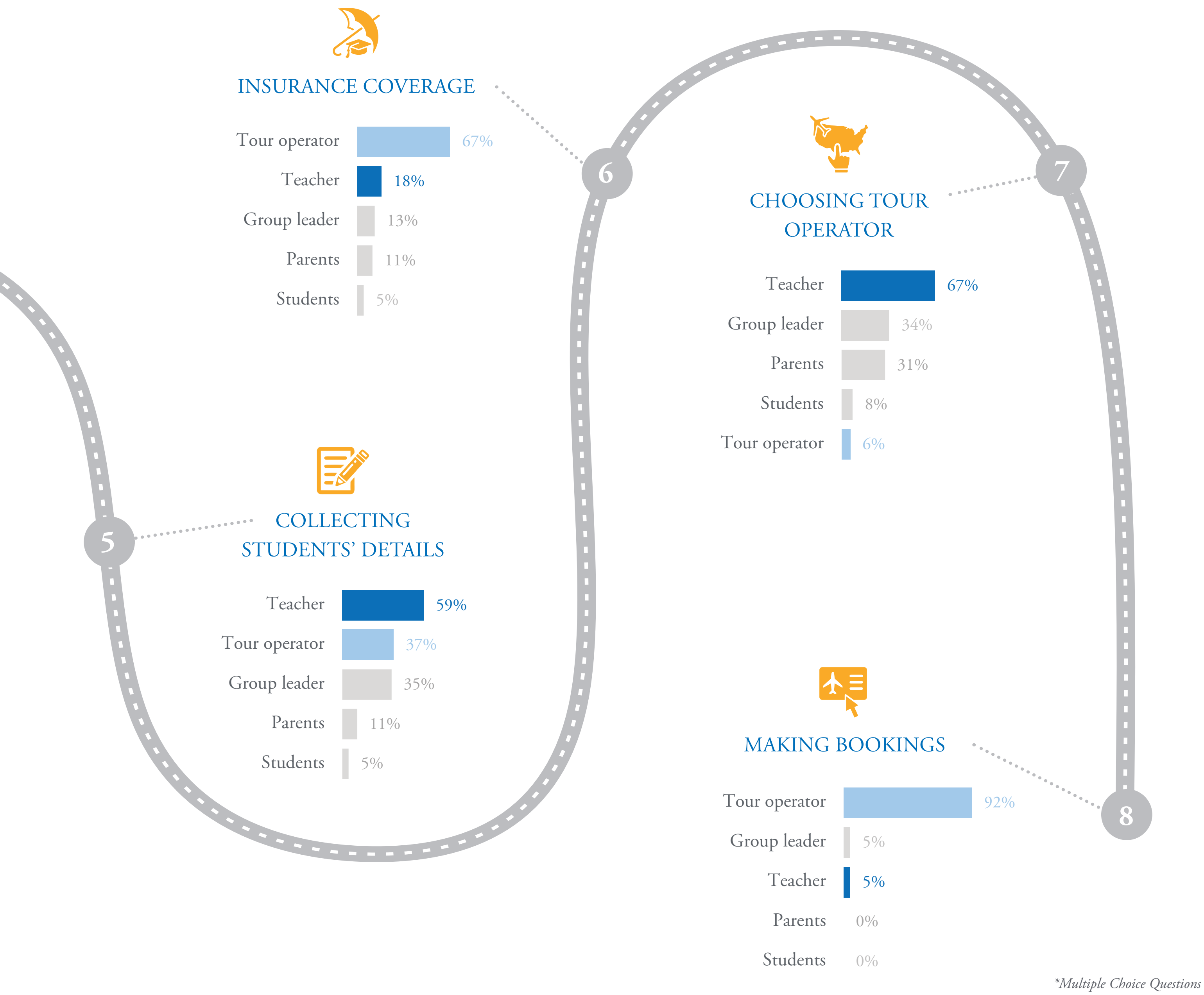
4 COLLECTING DEPOSIT/PAYMENTS

Teacher	57%
Tour operator	40%
Group leader	33%
Parents	16%
Students	2%

**Multiple Choice Questions*

While 15% of teachers report tour operators being in charge of choosing trip specifics, 49% of tour operators identify themselves as the decision-makers. Even more striking is the difference in how a trip is presented to parents. Of tour operators, 45% report this activity lies with them; conversely only 4% of teachers reported that tour operators present trip details to parents.

Nevertheless, teachers and tour operators work closely during the trip planning process, effectively utilizing available opportunities and the inherent expertise within these two groups.



Multiple Choice Questions

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 an international market research, intelligence and strategic development consultancy that specializes in the global youth, student, and educational travel industry. The company is a UNWTO Affiliate Member with individual membership of ESOMAR, the prestigious world association for market, social, and opinion research.

www.student-market.com

KEY FINDINGS

- Both the number of trips each year and the number of students on trips was reported to grow. Of tour operators, 68% predicted the growth to continue.
- Ninety-four percent of multiday trips last 3-6 days.
- The most popular trip types — curriculum-related tours and tours for performance bands — are organized by 73% of U.S. tour operators.
- The top two visited destinations for international travel led by U.S. tour operators are Europe (52%) and Canada (24%).
- Of student groups, 92% stay in hotels, primarily in the mid-scale and upscale category.
- Seventy percent of trips are from predefined "packages" offered by tour operators.
- The high season for trips organized by U.S. tour operators is March – May.

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