

# Student Travel

BUSINESS BAROMETER



ANNUAL  
REPORT  
2021



**BONARD**

## Introduction

The Student Travel Business Barometer was established by the Student and Youth Travel Association (SYTA) and BONARD in 2019. Throughout 2021, this initiative brought consistent and relevant intelligence about the effects of Covid-19 on student mobility, capturing both the pre-pandemic status of the industry and the effects of a two-year pandemic.

Our mission is to represent tour operators and travel agencies that create products for young people and to support the sector by providing advocacy as it navigates the pandemic. Therefore, SYTA contracted BONARD to conduct this research on student group travel among SYTA members and non-members alike.

This edition of the Student Travel Business Barometer offers an overall picture of the student group travel market in 2021. Thanks to consistent reporting, it also captures trend data providing insight into developments in the industry over the last three years.

### The research mapped student group travel patterns in the following areas:

- Three key performance indicators: anticipated and actual student numbers in 2021 and a forecast for 2022, average trip duration, and average group size
- Impact of Covid-19 on student group travel, both domestic and international
- Trip price analysis
- Outlook for major international travel destinations
- Country profile for the USA and Canada
- Domestic and international travel recovery scenarios
- Outlook for 2022

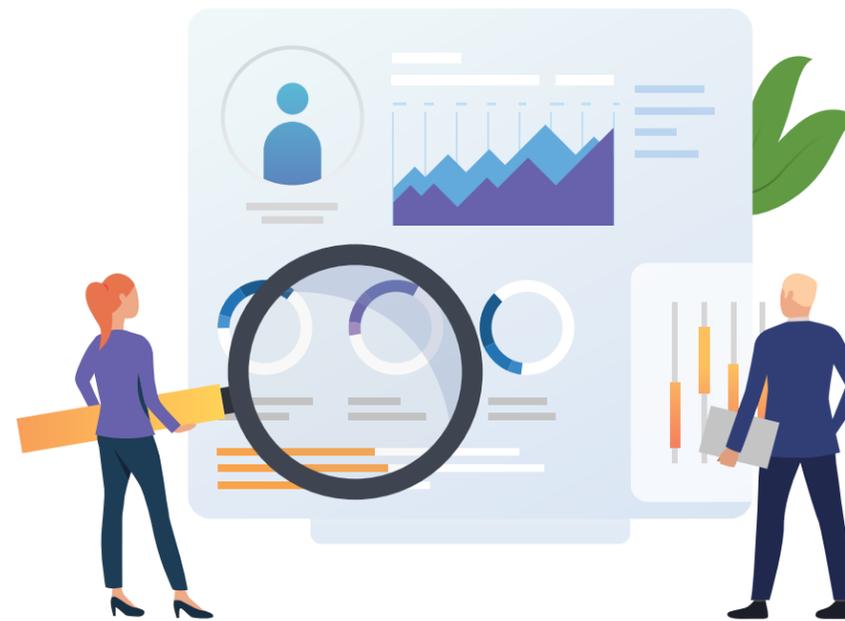
### The research covers the following mobility types:

- **Domestic travel**, which refers to any trip conducted within the students' own country;
- **International travel**, which refers to any trip which includes traveling from one country to another; and

**Impact of Covid-19**, under which we look at the impact of Covid-19 on the industry and provide insights on how best to recover.

Research was carried out by means of an online survey conducted between December 2021 and February 2022.

For the purpose of this project, 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.



**2021 FACT** THIS ANNUAL REPORT HAS BROUGHT MUCH-NEEDED INSIGHT INTO THE EFFECTS OF THE COVID-19 TRAVEL RESTRICTIONS, BACKED BY CONSISTENT AND RELEVANT MARKET INTELLIGENCE.

Carylann Assante

# Methodology

The survey uses the primary research method. Data were collected through an online quantitative survey distributed to SYTA members and pre-selected non-members specializing in tours for students and youth travelers in 19 countries. To complement the insights gathered by the survey, BONARD conducted qualitative interviews with pre-selected international tour operators and agencies.

**Note:** Rounding accounts for any percentages which do not add up to 100% exactly.



# About us

**SYTA** is the non-profit, international, professional trade association that promotes student and youth travel and seeks to foster integrity and professionalism among student and youth travel service providers. It is "the Voice of Student and Youth Travel®".

If you would like to learn more about SYTA, its activities, and its advocacy for safe and

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

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



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

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

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



# Executive Summary

## Domestic Travel

- Responding organizations provided domestic student group travel experiences for more than 80,000 students. This represents a 26% year-over-year decline over 2020.
- While there were fewer domestic trips than in the previous year, the **average trip duration increased** from 3.8 days in 2020 to 6 days in 2021. This indicated that those groups who were able to execute their travel plans opted for considerably longer stays.
- Considering key developments, 41% of surveyed tour operators and agencies **witnessed an increase of between 5% and 15% in total trip costs**. Such increase was predominantly driven by rising transportation costs.
- Looking at the pipeline for 2022, **half the pre-booked business consists of new trips**, while 30% of the arrangements are postponements from 2020 and 19% are trips deferred from 2021.
- Student tour operators expect gradual market recovery and anticipate reaching 43% of pre-Covid-19 levels in 2022 and 63% in 2023. The majority of stakeholders anticipate a full return to 2019 levels in 2024.

## International Travel

- In 2021, **the number of students taking international trips continued to decline**, with a 4% drop over 2020. This y-o-y drop was smaller than domestic travel, due to a sharper drop in international travel between 2019 and 2020 (a drop of 84%).
- The average duration of international trips was 10.5 days. Similar to the

pattern seen in domestic travel, **student groups opted for longer trips than in 2020** (7.3 days in 2020).

- In relation to total trip cost, 30% of tour operators indicated an increase of up to 10% over 2019, driven by the increase in prices for transportation. Thirty percent of tour operators saw an increase in air transportation cost of over 15%.
- **Sixty percent of business in 2022 consists of new trips**. The remaining 40% of 2022 bookings are postponed trips from 2020 and 2021.

- **Student tour operators anticipate a slower recovery for international than for domestic travel**. They foresee reaching 29% of pre-pandemic booking levels in 2022 and 46% in 2023.

## Economic Implications of Covid-19

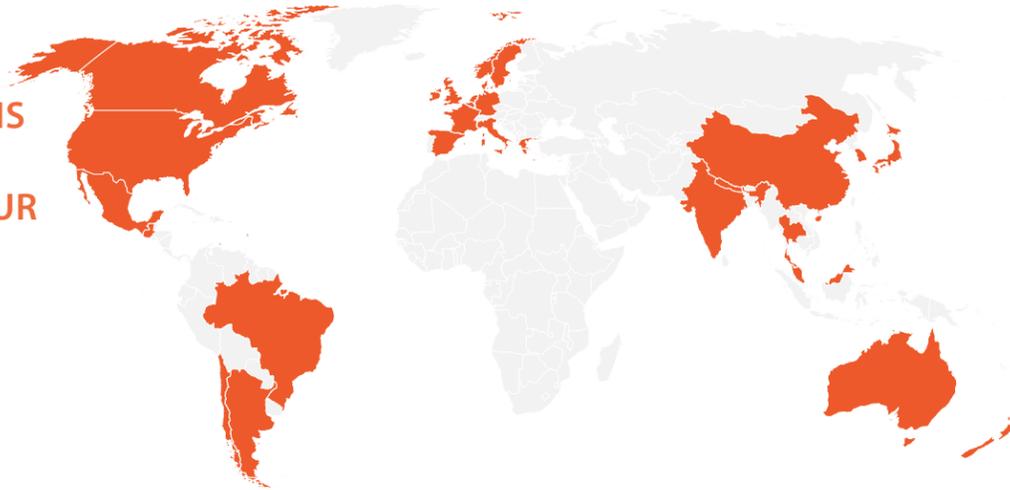
- USA- and Canada-based tour operators and travel agencies noted that their **business operations were reduced by 86% in 2020 and 82% in 2021** compared to 2019 levels.
- In absolute figures, 52 tour operators reported a loss of US\$638 million for the whole of 2021 as a direct result of the Covid-19 pandemic.



# Respondent Profile

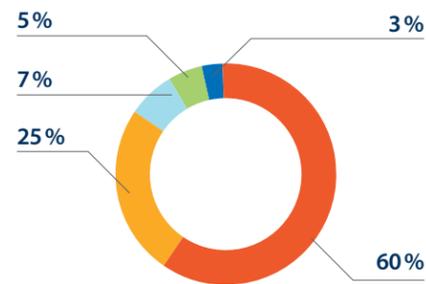
## Respondents' country of origin

IN 2021, THE BAROMETER DREW CONCLUSIONS FROM A STABLE SAMPLE OF 103 TOUR OPERATORS AND TRAVEL AND EDUCATION AGENCIES FROM 19 COUNTRIES WORLDWIDE.



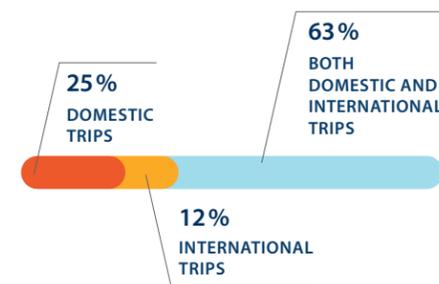
## Respondent typology

- **Student Tour Operator**  
Tour operator specializing in organizing tours for students
- **Tour Operator**  
Tour operator also organizing tours for students
- **Travel Agency**  
Agency offering mostly travel products for young people
- **Education Agency**  
Agency offering mostly international education programs



Respondent type	Percent	Count
Student Tour Operator	60%	55
Tour Operator	25%	23
Travel Agency	7%	6
Education Agency	5%	5
Other	3%	3
<b>Total number of unique respondents</b>	<b>100%</b>	<b>92</b>

## Type of travel

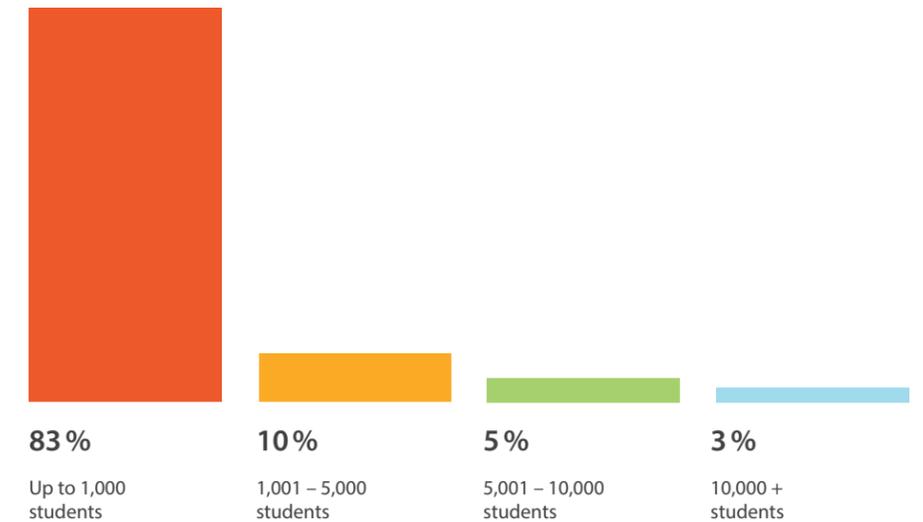


- **Domestic travel** refers to any trip conducted within the students' own country.
- **International travel** refers to any trip which includes traveling from one country to another.

## STOs by number of students sent on domestic trips in 2021

The effects of the pandemic are visible in the market structure. According to data provided by respondents, 83 % of tour operators and agencies sent up to 1,000 students per year on domestic trips.

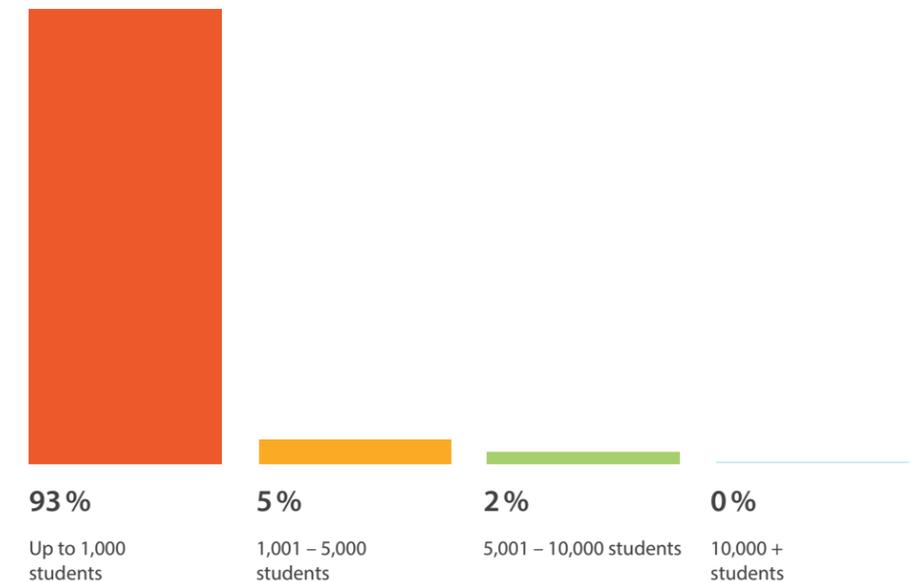
Furthermore, three percent sent more than 10,000 students, and 5 % catered for between 5,001 and 10,000 students.



## STOs by number of students sent on trips abroad in 2021

In 2021, 93 % of tour operators and agencies sent up to 1,000 students abroad, while 5 % sent between 1,001 and 5,000 students.

As regards international travel, 2% of respondents dealt with between 5,001 and 10,000 students, and no respondents catered for more than 10,000 students in 2021.



# Key Performance Indicators

## Domestic travel

### NUMBER OF STUDENTS TAKING A DOMESTIC TRIP



Based on 81 STOs running domestic trips.

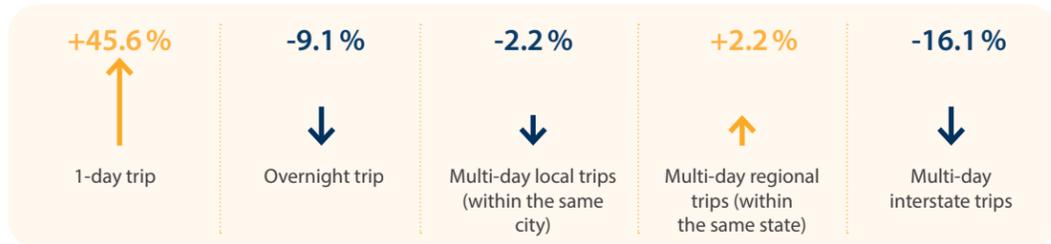
### TRIP PARAMETERS

- Average trip duration
- Average group size

2019	2020	2021
Average trip duration: 5.1 days	Average trip duration: 3.8 days	Average trip duration: 6 days
Average group size: 56 students	Average group size: 67 students	Average group size: 52 students

### ONCE TRAVEL FULLY RESUMES

#### EXPECTED DEMAND FOR THE FOLLOWING DOMESTIC TRIP TYPES COMPARED TO 2020



In 2021, participating tour operators and agencies organized domestic student group travel for more than 80,000 students, which represents a 26% year-on-year decline over 2020. The expectations for 2021 were compromised by the ongoing pandemic. Tour operators and travel agencies had expected more than 242,000 students to be involved in domestic student group mobility. With mobility resuming in 2022, 452,957 students are expected to take part in domestic group travel.

The average trip duration was 6 days, an improvement over the average 3.8 days recorded in 2020. Once students were able to take part in student group travel, trips were planned for a longer period of time to maximize the experience.

With 52 students traveling on average, group size was smaller than in 2020. In 2021, key trip attributes tended to reflect 2019 levels. With regard to the future popularity of various domestic trip types,

continued growth was seen in demand for 1-day trips, with no overnight stays, as already noted in the 2020 data.

In 2022, the popularity of these trips is expected to increase by 46%. The only trip type to slightly increase (2%) in popularity was a multiday regional trip (within the same state). Tour operators and agencies predict interstate and overnight trips will be in less demand in the current environment.

# Key Performance Indicators

## International travel

### NUMBER OF STUDENTS TAKING AN INTERNATIONAL TRIP



Based on 69 STOs running international trips.

### TRIP PARAMETERS

	2019	2020	2021
Average trip duration	8.1 days	7.3 days	10.5 days
Average group size	32 students	36 students	27 students

2021 was the second year in which there was almost no international student group travel. Student tour operators expected to organize travel for 36,000 students; however, they witnessed an actual drop of 4% in 2021 compared to 2020.

In absolute numbers, almost 20,000 students took part in international trips in 2021. International tour operators noted

a strong tendency among customers to choose domestic rather than international trips. With destinations easing travel restrictions, tour operators and agencies expected 93,000 students to undertake international group travel, which would mean reaching almost two thirds of 2019 levels. As regards the key attributes of international travel, smaller groups traveled for a longer period of time. The

average trip duration was 2.4 days longer in 2021 than in 2020, reaching an average of 10.5 days.

As in domestic travel, students who were able to travel opted for longer trip duration. The average number of students in international trips made in 2021 was 27 students, as compared to 36 students in 2020 and 32 in 2019.

# Trip Price Analysis

## Domestic travel

Domestic trip price and individual costs change in 2021 (comparing to 2019)

	Decreased by more than 15 %	Decreased by 10 - 15 %	Decreased by 5 - 9 %	Decreased by 1 - 4 %	No change	Increased by 1 - 4 %	Increased by 5 - 9 %	Increased by 10 - 15 %	Increased by more than 15 %
Total trip cost	11 %	4 %	1 %	3 %	17 %	10 %	20 %	21 %	11 %
Accommodation	8 %	10 %	10 %	3 %	21 %	10 %	9 %	24 %	5 %
Admission fee	8 %	2 %	0 %	3 %	32 %	23 %	24 %	9 %	0 %
Meals	3 %	3 %	3 %	5 %	20 %	20 %	22 %	17 %	8 %
Insurance	6 %	3 %	3 %	2 %	33 %	12 %	17 %	14 %	11 %
Air transportation	8 %	3 %	2 %	5 %	28 %	12 %	6 %	20 %	17 %
Transportation by bus/train	6 %	3 %	3 %	2 %	16 %	19 %	6 %	22 %	22 %

In this edition of the Barometer, tour operators shared their insight into changes in cost between 2021 and 2019.

For domestic travel, 41% of survey tour operators and agencies witnessed an

increase of between 5% and 15% in total trip cost, predominantly driven by an increase in transportation costs, including air and bus/train, while 28% of student tour operators saw no change in prices for air transportation for domestic trips.

Additionally, 20% saw prices of transportation going up by 10–15%, and 17% of respondents noted an increase of more than 15%. The price increase was more evident in bus/train transportation, where 44% of tour operators noted an increase of more than 10%.

## International travel

International trip price and individual costs change in 2021 (comparing to 2019)

	Decreased by more than 15 %	Decreased by 10 - 15 %	Decreased by 5 - 9 %	Decreased by 1 - 4 %	No change	Increased by 1 - 4 %	Increased by 5 - 9 %	Increased by 10 - 15 %	Increased by more than 15 %
Total trip cost	8 %	5 %	0 %	0 %	30 %	15 %	15 %	13 %	15 %
Accommodation	5 %	5 %	5 %	8 %	24 %	14 %	11 %	16 %	11 %
Admission fee	3 %	3 %	0 %	3 %	47 %	19 %	14 %	8 %	3 %
Meals	3 %	3 %	0 %	3 %	43 %	14 %	14 %	16 %	5 %
Insurance	3 %	0 %	0 %	3 %	36 %	11 %	17 %	19 %	11 %
Air transportation	5 %	3 %	3 %	5 %	16 %	8 %	16 %	14 %	30 %
Transportation by bus/train	3 %	0 %	3 %	3 %	32 %	22 %	8 %	5 %	24 %

The vast majority of tour operators saw no major changes in trip costs for international trips.

In relation to total trip cost, tour operators indicated either no change (30% of

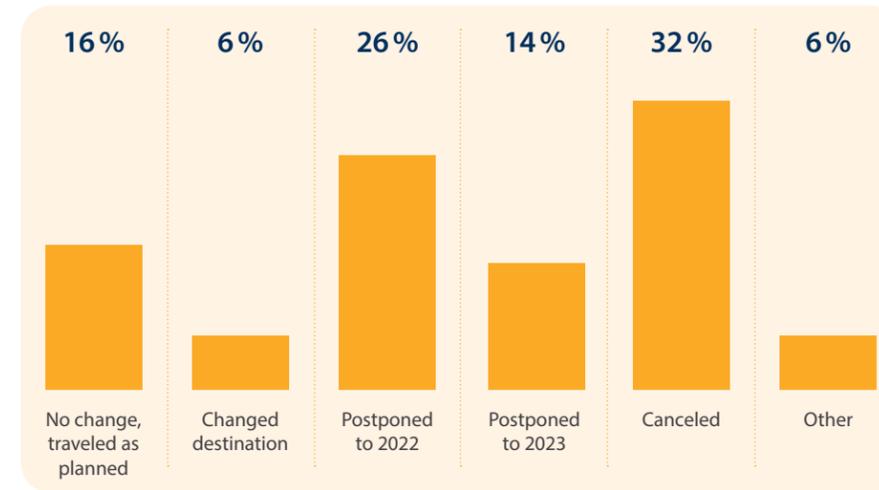
respondents) or an increase of up to 10% (30% of respondents). Furthermore, no change in cost was indicated by the majority of tour operators for admission fees (47%), meals (43%), and insurance (36%). As in domestic travel, increased

costs were connected to the increased price of transportation. Thirty percent of tour operators saw an increase in air transportation cost of over 15%, and the same increase was witnessed by 24% of respondents in bus/train transportation.

# Impact of Covid-19 on Travel Plans

## Domestic travel

Change in customers' 2021 domestic travel plans



**STUDENT TRIPS BOOKED FOR 2022**

2020 postponements to 2022	30 %
2021 postponements to 2022	19 %
2022 new trips	50 %

**STUDENT TRIPS BOOKED FOR 2023**

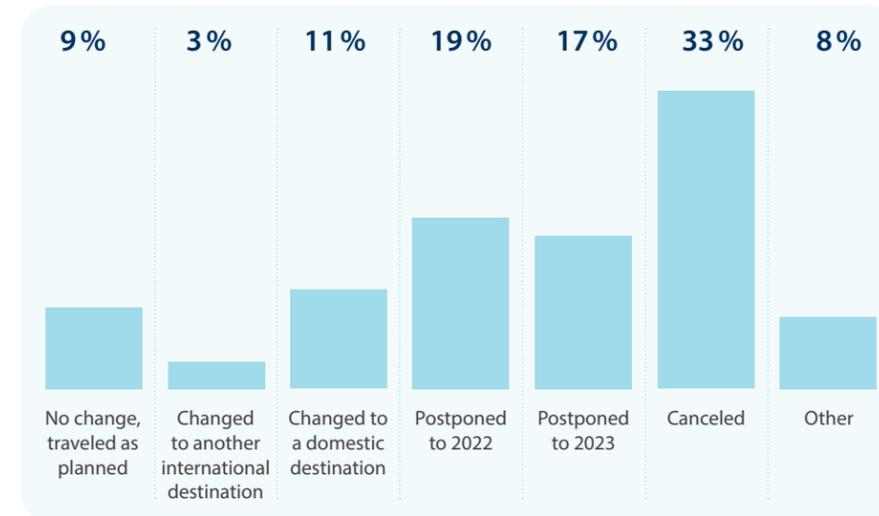
2021 postponements to 2023	16 %
2022 postponements to 2023	13 %
2023 new trips	70 %

In 2021, 16% of student groups made no change to their travel plans. More importantly, 32% of domestic trips were canceled, which is an improvement on the 65% of domestic trips canceled in 2020.

Looking at the pipeline for 2022, half the business consists of new trips booked. The other half is postponements from 2020 (30%) and 2021 (19%). With uncertainty still surrounding the pandemic, 30% of student trips have been rescheduled for 2023.

## International travel

Change in customers' 2021 international travel plans



**STUDENT TRIPS BOOKED FOR 2022**

2020 postponements to 2022	23 %
2021 postponements to 2022	18 %
2022 new trips	60 %

**STUDENT TRIPS BOOKED FOR 2023**

2021 postponements to 2023	18 %
2022 postponements to 2023	13 %
2023 new trips	71 %

international student trips considered options other than cancellation. Thirty-three percent of customers canceled their trips, as compared to 67% in 2020, while 36% decided to postpone their international trips to 2022 and 2023.

With travel restrictions remaining in place for most of 2021, only 9% of international

student groups did not change their travel plans. More importantly,

Almost two thirds of business in 2022 and 2023 consists of new trips, with the remaining bookings being postponed from 2020, 2021, and 2022.

## Country Profile: Canada

Compared to 2019, the expectations for domestic student group travel in 2021 were not high. Canadian tour operators and travel agencies expected 23,800 students to take trips domestically and internationally; in reality, 779 students traveled in 2021. Tour operators and agencies expect the industry to start to recover in 2022, with 31,032 students undertaking trips, with

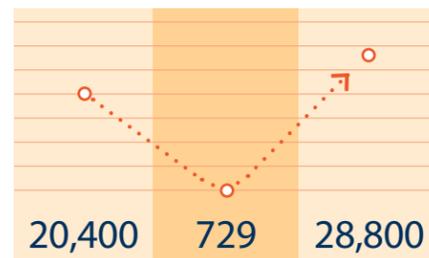
the recovery focusing on domestic trips rather than international travel.

In 2021, the average trip duration and average group size dropped compared to the 2020 figures. On average, domestic trips were 3.2 days long (compared to 3.7 days in 2020), and groups had an average of 40 students (compared to 62 students in 2020).

In Canada, one third of domestic trips were postponed to 2022, and 35% of international trips will be made in 2023 instead of 2021. Thirty-four percent of international trips in 2021 were canceled, compared to the figure of 90% in 2020. Tour operators ranked Ottawa, Montreal, and Toronto as the most popular destinations for student group travel in 2021.



### Domestic travel



Number of students expected to travel in 2021: 20,400  
 Number of students who actually traveled in 2021: 729  
 Number of students expected to travel in 2022: 28,800

Based on 11 STOs running domestic trips.

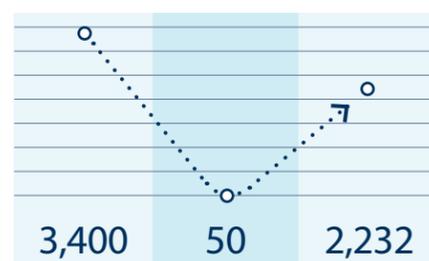
### Change in customers' 2021 domestic travel plans



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



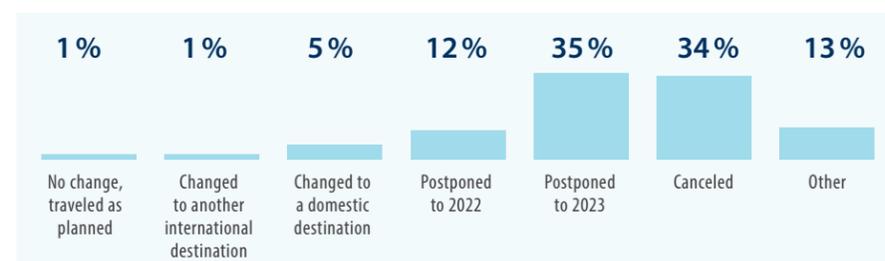
### International travel



Number of students expected to travel in 2021: 3,400  
 Number of students who actually traveled in 2021: 50  
 Number of students expected to travel in 2022: 2,232

Based on 9 STOs running international trips.

### Change in customers' 2021 international travel plans



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



#### Top 5 destinations

- Ottawa
- Montreal
- Toronto
- Niagara Falls
- Quebec City

## Country Profile: USA

In the USA, 86,662 students took part in domestic and international student group travel. However, this number is 2.7 times smaller than the number of students expected to travel in 2021.

In 2021, there were changes in the key attributes of both domestic and international trips. Students traveled in smaller groups for longer periods of time.

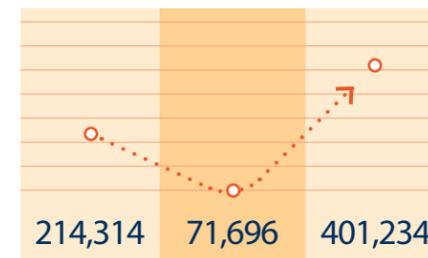
In 2021, the average domestic trip duration increased from the 3.9 days seen in 2020 to 6.2 days. At the same time, the average group size shrank from 72, the 2020 figure, to 48 students. Similarly, international trips were, on average, 2.2 days longer in 2021, with 12 fewer students per group.

In terms of travel plans, 15% of customers managed to undertake domestic trips

as planned. Almost half (49%) decided to change their original plans, either by shifting to a new destination (7%) or postponing to 2022 (28%) or 2023 (13%). The USA witnessed the highest share of international trips being canceled, with 45% of customers deciding not to undertake an international trip. This figure is well above the global average (33%).



### Domestic travel



Number of students expected to travel in 2021: 214,314  
 Number of students who actually traveled in 2021: 71,696  
 Number of students expected to travel in 2022: 401,234

Based on 54 STOs running domestic trips.

### Change in customers' 2021 domestic travel plans



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



### International travel



Number of students expected to travel in 2021: 20,359  
 Number of students who actually traveled in 2021: 14,966  
 Number of students expected to travel in 2022: 56,010

Based on 29 STOs running international trips.

### Change in customers' 2021 international travel plans



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

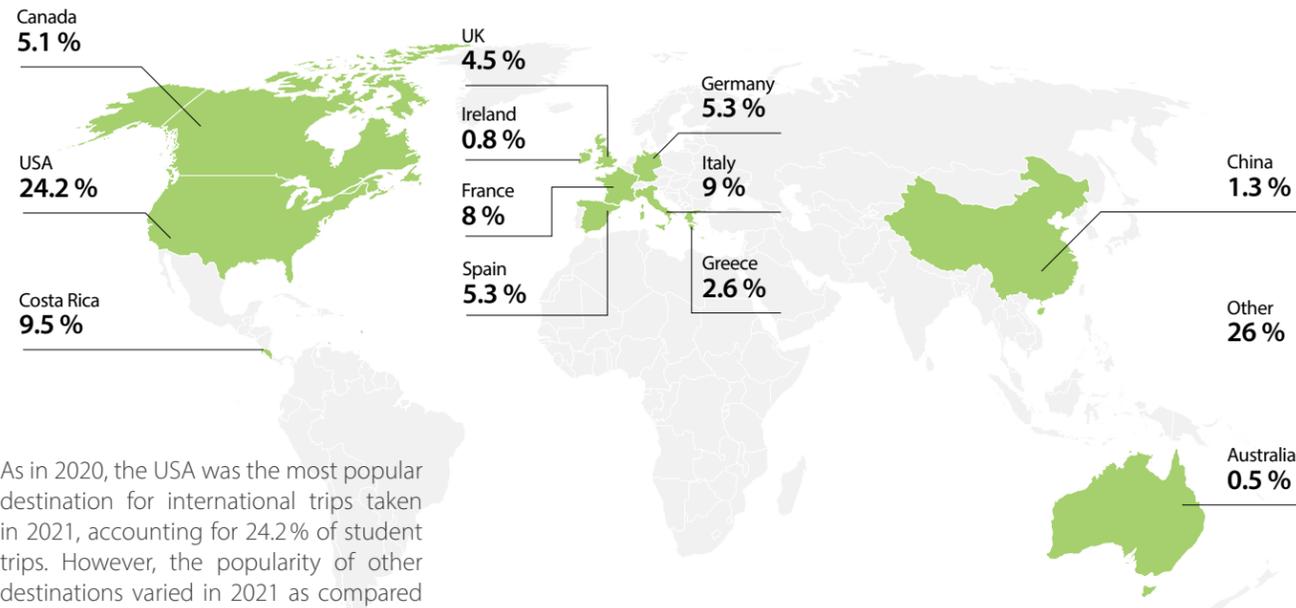


#### Top 5 destinations

- Orlando
- New York
- Washington, D. C.
- Boston
- Philadelphia

# Destination Benchmark

Overview of international trips by destination (%)

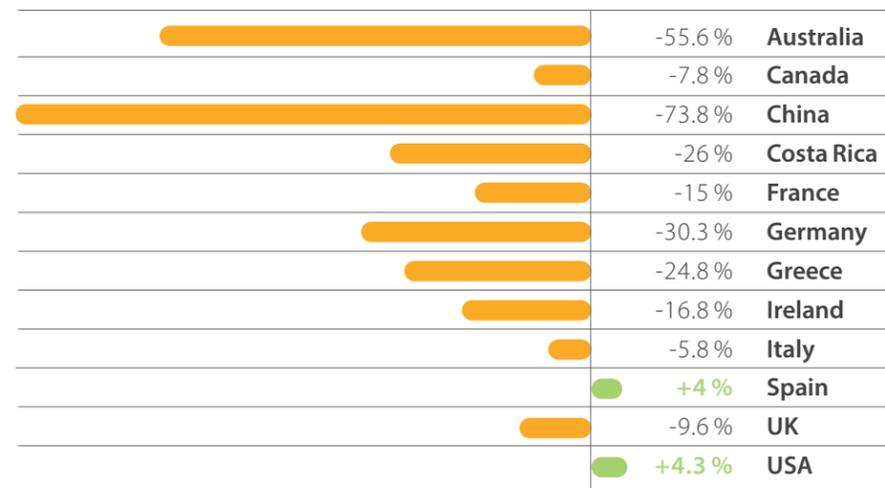


As in 2020, the USA was the most popular destination for international trips taken in 2021, accounting for 24.2% of student trips. However, the popularity of other destinations varied in 2021 as compared to previous years. For the first time since the Barometer was launched, Costa Rica was the second most popular destination, hosting 9.5% of student trips – an increase from the 3.2% of trips made in 2020. European countries, such as Italy, France, and Germany, outperformed Canada, with shares of 9%, 8%, and 5.3%, respectively. Twenty-six percent of trips went to countries other than the destinations named above, creating demand for new travel destinations in 2021.

Change in customer preference is also reflected in international travel destination preferences for upcoming trips. Tour operators and agencies anticipate a slight increase in demand for two countries only – the USA and Spain. Traditional destinations are expected to face more difficulties going into recovery, especially those whose borders were closed for most of 2021. For example, the demand for China is expected to drop by 73.8% and for Australia by 55.6%.

## Once travel resumes:

Expected student group travel demand for the following international student travel destinations compared to 2019



Note: Score-based ranking quantifying the current market sentiment (respondents were able to choose values between '100' and '-100').

# Economic Implication of Covid-19

Effects on Canadian and US economy

The Covid-19 pandemic has caused significant disruptions to the US and Canadian economies. By the end of the first quarter of 2020, the pandemic had brought international travel to an abrupt halt and significantly impacted the student group travel industry.

USA- and Canada-based tour operators and travel agencies noted that their business operations were reduced by 86% in 2020. While many hoped that recovery would start in 2021, the uncertainty surrounding new waves of travel restrictions caused an 82% reduction of business operations in 2021 compared to 2019 business levels.

In absolute figures, 52 tour operators reported a loss of US\$638 million for the whole of 2021 as a direct result of the Covid-19 pandemic.

The jobs market has also been heavily affected by the pandemic. The surveyed tour operators and travel agencies cumulatively reported 2,670 employees



in 2019, of whom 58% were impacted by the pandemic. By the end of 2020, 1,540 employees had been released from their contracts. In 2021, the industry saw its first signs of recovery, and tour operators and travel agencies made 250 new hires. For 2022, the plan is to gradually increase the number of employees to 1,916. However, this represents only 73% of pre-Covid-19 levels.

At the same time, 37% of tour operators and employees noted that they are not planning to hire any new employees in 2022. In those cases where hiring plans are in place, tour operators are looking for new hires in sales (37% of respondents) and accounting/technology/operations (31% of respondents) or as tour managers (21% of respondents).

## Percentage of income reduced from business operations in 2020 and 2021 versus the same time in 2019



**7.3 MONTHS**

THE ANTICIPATED AVERAGE NUMBER OF MONTHS AS LAG TIME BETWEEN BOOKINGS AND RECEIPT OF REVENUE ASSOCIATED WITH THE BOOKED TRAVEL

Loss in gross revenue (in US\$) for entire 2021 as a direct result of the impact of Covid-19

**US \$638 m**

Canada **\$25 m**  
USA **\$613 m**

Based on 52 STOs.

## Number of employees

2019	2,670
2020	1,130
2021	1,380
2022 (forecast)	1,961

## Hiring plans for 2022

Accounting/Technology/Operations	31.3 %
Group Leaders	16.4 %
Marketing	14.9 %
Tour Guides	16.4 %
Tour Manager	20.9 %
Sales	37.3 %
Other	9 %
We are not rehiring at the moment	37.3 %

## Market Recovery Scenarios

### Domestic Travel

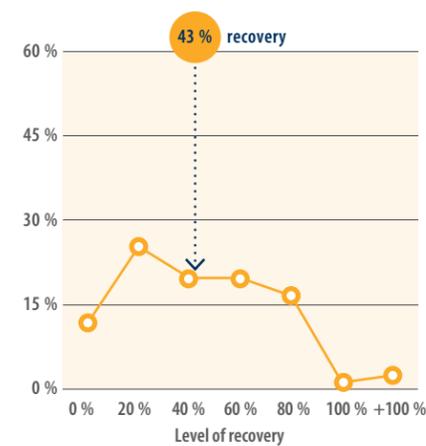
Survey respondents were asked to share their viewpoints on possible recovery scenarios in order to aggregate individual knowledge and make an informed overall assessment of the future outlook.

Recovery expectations in 2021 were less optimistic than those in 2020. Whereas in 2020, tour operators and agencies anticipated reaching 66% of pre-pandemic levels in 2022, now they anticipate reaching 43% in 2022 and 63% in 2023.

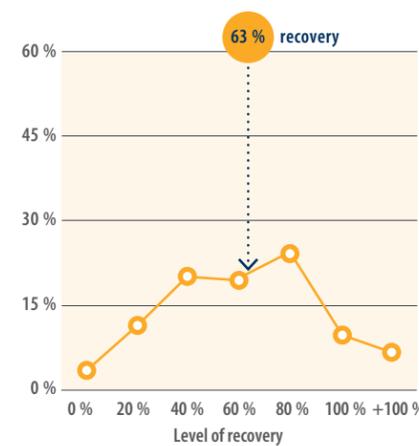
Previously, there was an expectation that almost full recovery (92%) would be reached in 2023. In 2021, tour operators and agencies expected to achieve 81% of pre-Covid-19 levels in 2024.

### Percentage of 2019 domestic trip bookings anticipated to recover in the following years

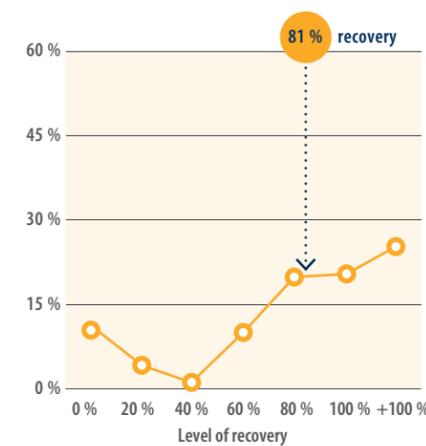
#### 2022



#### 2023



#### 2024



### International Travel

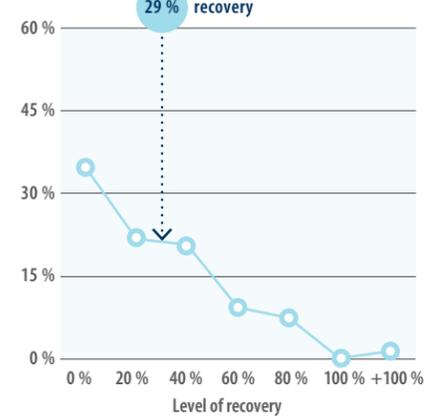
Student tour operators anticipate slower recovery for international than for domestic travel.

In 2022, they anticipate reaching 29% of pre-pandemic booking levels and achieving 46% in 2023. While in 2020, student tour operators believed they

would achieve 77% of pre-Covid-19 levels in 2023, the scenario now indicates recovery up to 46%. In 2024, tour operators expect to make a 67% recovery.

### Percentage of 2019 international trip bookings anticipated to recover in the following years

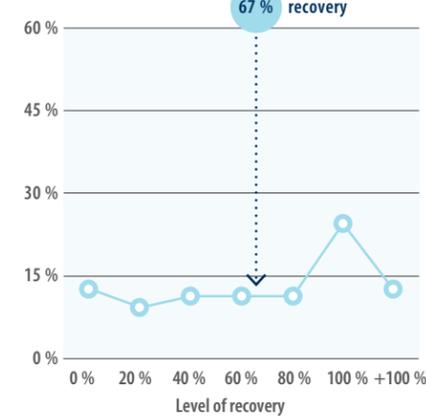
#### 2022



#### 2023



#### 2024



## Outlook for 2022



As tour operators and agencies are still cautious about their business plans, it is predicted that the industry will start to recover in 2022. With the disruption caused by two years of pandemic and travel restrictions, new trends are appearing in student group travel.

Due to travel restrictions in the past two years, there is a consensus (79%) among

tour operators and travel agencies that customers will opt for domestic rather than international travel.

Additionally, 66% of tour operators agree that students will prefer traveling within the same state/province. In light of that, 51% of student tour operators confirmed that health and safety measures will play an important role in the choice of

destination. Consequently, teachers are also affected, and 73% of tour operators and agencies believe that, due to the health and safety requirements imposed in destinations, teachers will be less willing to organize school trips. Hand in hand with these developments, there is a consensus that school administrations will be more reluctant to approve trips in 2022.

	Strongly disagree	Somewhat disagree	Somewhat agree	Strongly agree	I do not know
Customers will opt for more national park/outdoor attractions rather than city visits.	9%	16%	44%	18%	14%
Customers will opt for domestic trips rather than international travel.	7%	9%	13%	66%	6%
Health and safety measures will play an important role when choosing trip destination.	3%	6%	34%	51%	6%
School administration will be less willing to approve travel in 2022.	7%	14%	31%	41%	6%
Teachers will be less willing to organize school trips due to different health and safety requirements.	4%	20%	37%	36%	3%
More trips will be booked within the same state/province.	10%	10%	36%	30%	14%
More trips will be booked to Tier 2 cities than Tier 1 cities.	6%	20%	35%	16%	24%

## Conclusions

In 2021, the industry continued to be affected by the pandemic, with continuing declines in the numbers of students traveling domestically and internationally. However, the student group travel sector also saw certain improvements, and there were a number of indications that tour operators changed strategies and adapted in order to retain business during the pandemic. Nonetheless, the economic impact on the industry over the past two years has been severe, with predictions for full recovery ramping up to 2024.

### Outlook for Recovery

- The pace of recovery remains slower than in other education sectors. Student tour operators and travel agencies expect student group travel to return to 2019 levels in 2024 or later. However, easing mobility restrictions and increasing confidence from students and parents is helping to release the pent-up demand for student group travel.
- For international travel, rising cases of Covid-19 and the Russian invasion of Ukraine at the beginning of 2022 will rattle the pace of recovery and affect travelers' confidence in the first months of 2022.
- However, the student group travel sector is poised for further growth in the long-term, and student tour operators and travel agencies will need to be flexible so they can quickly overcome staff shortages when the market picks up the pace.

### Strategic Shifts

- While international student group travel will recover at a slower pace, domestic tourism will continue to drive the return to pre-Covid-19 levels.

According to the survey, 79% of tour operators and travel agencies claim their customers will opt for domestic rather than international travel and will choose to travel within the same state/province.

- Student tour operators and travel agencies will shift to longer trips in order to maximize trip value and increase revenue.
- Seventy-three percent of tour operators and agencies note that, due to the health and safety requirements imposed in destinations, teachers will be less willing to organize school trips; thus, a more active role of student tour operators and suppliers in notifying changes to health and safety measures might be needed.
- To avoid urban locations, it is predicted that more trips will be booked to Tier 2 cities than Tier 1 cities in 2022. Domestic travel will be focused on national parks and outdoor venues.

### Workforce Changes

- The surveyed tour operators reported that they cumulatively employed 2,670 staff in 2019, of whom 58% were released from their contracts in 2020. Hence, rebuilding the workforce will remain a challenge in 2022.
- In 2022, operators surveyed plan to hire 580 more employees. These new entries into the tourism industry workforce will have major implications for training in the future as well as financial implications in terms of higher salary demands, work-life flexibility, etc.

### World Events and Student Travel

- The surge in oil prices, increase in inflation, potential rise in interest rates,

and continued disruption in supply chains will translate into an increase in trip prices for student group travel, both domestically and internationally. An increase in the overall trip prices could lead to a shorter average trip duration in 2022 or more creative ways of keeping the student travel experience affordable.

- While there is cause for optimism that the Covid-19 Pandemic is now entering an endemic, rather than a pandemic stage, the residual effects of mask mandates, vaccination requirements and general inconsistent standards for travel worldwide will continue to slow the pace of recovery, particularly for international travel.

### CONCLUSION

Ongoing pandemic concerns, economic conditions and the Russian invasion in Ukraine will continue to cause hesitancy to travel in school administrators, teachers and parents in the foreseeable future. However, the majority of tour operators surveyed in this Barometer are optimistic for full recovery – that is a return to 2019 levels of travel – by 2024.

To reach this goal, however, the data indicates that student and youth operators will be challenged to find new ways to promote safety measures and reassure their clients that they will be their partner in providing safe and financially protected travel experiences.

More aggressive promotion, employee incentives, training and proactive partnerships among destinations can all contribute to higher levels of recovery in 2022 and beyond.

