

Student Travel Business Barometer: 2022

Welcome to the 2022 Student Travel Business Barometer Survey. This is an invitation-only survey which measures domestic and international student group travel performance and trends.

Student and Youth Travel Association (SYTA) and **BONARD** continue spearheading initiatives in the student group travel industry that bring reliable and consistent data on market trends and student preferences, which are of great relevance to governments, student travel buyers and student tour operators.

We sincerely hope that you will help us to support you so that you can have the most relevant data and industry update as you are navigating to recovery. Please complete this important survey by **February 11, 2023**.

If you have any queries or require any assistance, please contact us at ivana.slobodnikova@bonard.com.

Yours sincerely,

Carylann Assante, CAE

Ivana Slobodnikova

Chief Executive Officer, SYTA

International Education Director, BONARD

Confidentiality: BONARD takes the confidentiality of your data very seriously. Under no circumstances will any of the data you provide be identified on an individual basis or shared with any third party, including SYTA. Data will only be presented as aggregate. The survey is being conducted in compliance with the **ICC/ESOMAR Code on Market and Social Research**.

1) Which country is your organization based in?

2) What type of organization do you represent?

Student Tour Operator (*tour operator specializing in organizing tours for students*)

Tour Operator (*tour operator also organizing tours for adults and students*)

Travel Agency/Advisor (*agency offering mostly travel products for young people*)

Education Agency (*agency offering mostly international education programs*)

Other (please specify): _____

3) Which types of student group travel does your company organize?

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.

*

Domestic trips

International trips

Both domestic and international trips

4) Do you also serve as an inbound receptive?

Yes

No

Logic: Hidden unless: #4 Question "Do you also serve as an inbound receptive?" is one of the following answers ("Yes")

5) If you serve as inbound receptive, please list the countries you work with:

6) Questions on the following page relate to the number of students traveling.

Alternatively, you can skip the following questions (Q6 - Q8 for domestic travel and Q19 - Q21 for international travel) by uploading an MS Excel file extracted from your management system

There is no required format for the MS Excel file.

The following information needs to be included:

- **The number of students traveling in 2022**
- **Trip duration (number of days) in 2022**
- **Number of students per group in 2022**
- **Trip destination (domestic/international trip)**

This information can be included as records of individual trips or aggregated data for 2022.

Please allow a few seconds for the upload to complete before proceeding to the next page of the survey.

Page entry logic: This page will show when: #3 Question "**Which types of student group travel does your company organize?**"

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.

" is one of the following answers ("Domestic trips", "Both domestic and international trips")

» **Domestic Trips: Demand and Market Trends**

7) How many students traveled with your organization in 2019?

8) How many students did you expect to travel with your organization in 2022 and how many did actually travel?

Note: Please state how many students booked domestic trips with your organization for 2022 and how many actually traveled (i.e. expected volume vs real volume in 2021)?

Number of students expected to travel in 2022:

Number of students who actually traveled in 2022:

9) If you executed any domestic trips in 2022, what was the average trip duration (in days) and group size?

Average trip duration (in days): _____

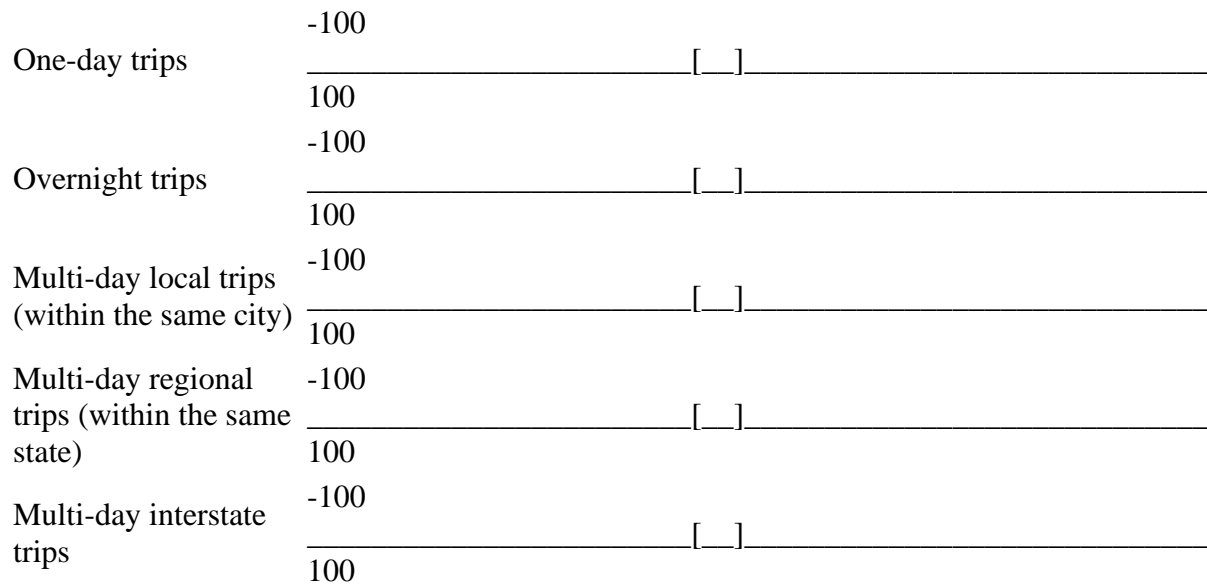
Average number of students per group:

10) How many students do you expect to travel with your organization in 2023?

Number of students expected to travel in 2023:

Admission fee								
Meals								
Insurance								
Air transportation								
Transportation by bus/train								

14) For travel in 2023, how much do you expect demand for the following domestic trip types to change compared to 2019?



Logic: Hidden unless: #1 Question "Which country is your organization based in?" is one of the following answers ("United States")

15) For domestic trips executed in 2022, what share of your customers traveled to the following destinations?

Note: Percentages must add up to 100%.

- _____ Atlanta
- _____ Boston
- _____ Branson
- _____ Cleveland
- _____ Chicago
- _____ Gettysburg
- _____ Los Angeles
- _____ Memphis
- _____ Nashville
- _____ New Orleans
- _____ New York
- _____ Orlando
- _____ Philadelphia
- _____ Puerto Rico
- _____ San Francisco
- _____ Seattle
- _____ St. Louis
- _____ Washington, D.C.
- _____ Williamsburg

Logic: Hidden unless: #1 Question "Which country is your organization based in?" is one of the following answers ("Canada")

16) For domestic trips executed in 2022, what share of your customers traveled to the following destinations?

Note: Percentages must add up to 100%.

- _____ Banff
- _____ Montreal
- _____ Charlottetown
- _____ Niagara Falls
- _____ Ottawa
- _____ Quebec City
- _____ Toronto
- _____ Vancouver
- _____ Winnipeg
- _____ Whistler

Logic: Hidden unless: #1 Question "Which country is your organization based in?" is one of the following answers ("Australia")

17) For domestic trips executed in 2022, what share of your customers traveled to the following destinations?

Note: Percentages must add up to 100%.

- _____ Canberra
- _____ Cairns/North QLD
- _____ QLD Outback
- _____ Northern Territory
- _____ NSW
- _____ SE QLD
- _____ Tasmania
- _____ Western Australia

_____ Victoria (excl ski resorts)

_____ South Australia

_____ Other

18) Please list the top emerging destinations your students traveled to in the last year. These are new destinations for your student groups:

1. Destination: _____

2. Destination: _____

3. Destination: _____

4. Destination: _____

5. Destination: _____

19) What percentage of your 2019 domestic trip bookings do you anticipate recovering in the following years?

	No recovery	20% recovery	40% recovery	60% recovery	80% recovery	100% recovery	More than 100% recovery
2023							
2024							
2025							

20) What percentage of domestic trips is funded from the following resources?

Note: Percentages must add up to 100%.

	2019	2022
Crowdfunding		
Family resources		
Federal TRIO funding		
Grants		
PTA		
School budgets		
Small business/community		
Trip destination		
Other		

Page entry logic: This page will show when: #3 Question "**Which types of student group travel does your company organize?**"

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.

" is one of the following answers ("International trips", "Both domestic and international trips")

» **International Trips: Demand and Market Trends** | Student Travel Business Barometer

21) How many students travelled with your organization in 2019?

22) How many students did you expect to travel abroad with your organization in 2022 and how many did actually travel?

Note: Please state how many students booked international trips with your organization for 2022 and how many did actually travel (i.e. expected volume vs real volume in 2022)?

Number of students expected to travel in 2022:

Number of students who actually traveled in 2022:

23) If you executed any international trips in 2022, what was the average trip duration (in days) and group size?

Average trip duration (in days): _____

Average number of students per group:

24) How many students do you expect to travel abroad with your organization in 2023?

Number of students expected to travel in 2023:

25) What percentage of your customers changed their 2022 international travel plans as follows?

Note: Percentages must add up to 100%.

- _____ No change, traveled as planned
- _____ Changed to another international destination
- _____ Changed to a domestic destination
- _____ Changed trip parameters (e.g. shortened the trip)
- _____ Postponed to 2023
- _____ Postponed to 2024
- _____ Canceled
- _____ Other

26) What percentage of international trips booked for 2023 are:

Note: Percentages must add up to 100%. Use 0% if you did not travel any students. For 2020 and 2021 trips please include information for trips that were booked and completely changed to new bookings.

- _____ 2020 postponements to 2023
- _____ 2020 replacements
- _____ New trips for 2021
- _____ 2021 postponements to 2023
- _____ 2022 new trips
- _____ 2023 new trips

27) Compared to 2019, how did the international trip price and individual costs change in 2022?

Note: Per person, US\$.

	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%
Total trip cost								
Accommodation								
Admission fee								
Meals								
Insurance								
Air transportation								
Transportation by bus/train								

28) If you executed any international trips in 2022, please estimate the percentage of trips that went to the following destinations.

Note: Percentages must add up to 100%.

- _____ USA
- _____ UK
- _____ USA
- _____ UK
- _____ Australia
- _____ Canada
- _____ China
- _____ Costa Rica
- _____ France
- _____ Germany

							100% recovery
2023							
2024							
2025							

» **Transportation** | Student Travel
Business Barometer

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

- Yes
- No
- Sometimes

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

- Yes
- No
- Sometimes

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

- Yes
- No

Sometimes

34) Do your student groups request motorcoaches with seat belts?

Yes

No

Sometimes

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

Yes

No

Sometimes

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

Yes

No

Sometimes

37) Do you book motorcoaches for day trips?

Yes

No

Sometimes

Thank you for your time & inputs
