

Student Travel

BUSINESS BAROMETER
EXECUTIVE SUMMARY



**ANNUAL
REPORT
2022**



Introduction

The Student Travel Business Barometer was established by the Student and Youth Travel Association (SYTA) and BONARD in 2019. The report delivers an overall analysis of the student group travel market in 2022.

It has established sector-specific and globally recognized consistent reporting, delivering trend data

and insight into key developments shaping the industry.

The following is a summary of the key findings and overall outlook for the near future, based on the data gathered from a stable sample of 140 tour operators and travel and education agencies from 22 countries worldwide.

Executive Summary

In-country travel



354,000

STUDENTS TRAVELED
IN-COUNTRY
IN 2022



+267%

MORE STUDENTS
TRAVELED IN 2022
COMPARED TO 2021



MORE
THAN **10%**
INCREASE IN PRICES
WAS SEEN IN OVERALL
TRIP COSTS

- In-country student group travel experienced a robust recovery in 2022, surpassing the expectations of tour operators. Whereas tour operators initially anticipated that over 295,000 students would embark on in-country trips, the actual number was 353,500, exceeding expectations by 20%.
- In-country travel reached 54% of its pre-pandemic volume in 2022. The recovery was primarily led by tour operators based in the U.S., where student groups resumed travel several months ahead of the rest of the world.
- Looking ahead to 2023, 47% of tour operators have optimistic expectations, aiming to achieve more than 80% of their pre-pandemic booking volume from 2019 and by 2025, 66% of respondents expect to reach their pre-pandemic volumes.
- Majority of tour operators saw prices increase by more than 10% over 2019 figures for in-country trips. Transportation, covering bus, train, and flight tickets, increased more than any other trip component, by more than 15%. The second largest increase was for accommodation.
- Prices are expected to climb for all trip components throughout 2023. Tour operators noted that price increases in the first quarter of 2023 were more significant than anticipated.
- The recovery of the student group travel sector was largely propelled by in-country travel in the USA, which reached 67% of its pre-pandemic volume in terms of student numbers in 2019. The actual number of students traveling surpassed the expectations of tour operators by 27%, a 65,000 more students on the road.



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.

www.syta.org

BONARD

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.

www.bonard.com

Executive Summary

Out-of-country travel



60,000

STUDENTS TRAVELED
OUT-OF-COUNTRY
IN 2022



+198%

MORE STUDENTS
TRAVELED IN 2022
COMPARED TO 2021



24%

OF ALL STUDENTS
TRAVELED TO THE UK,
TOP DESTINATION IN 2022

- Tour operators predicted a substantial recovery in 2022 for out-of-country travel, estimating that around 59,000 students would travel abroad. As with in-country travel, the actual number of students traveling internationally in 2022 exceeded expectations, reaching 60,000. This represented a significant (198%) increase over the previous year.
- The UK became the leading destination, being chosen by 24% of customers in the student group travel sector. This popularity was primarily driven by both U.S.-based and Europe-based tour operators, a substantial number of whose customers chose the UK (21% and 52%, respectively).
- The USA, France, UK and Spain are expected to gain further popularity for out-of-country trips in 2023.
- As many as 57% of out-of-country trips took place as scheduled, a significant increase from 2021, when 9% of trips were executed as planned. As travel restrictions were lifted, a significant portion of out-of-country trips proceeded as planned, with minimal cancellations.
- A complete recovery in out-of-country travel may require a few more years. For 2023, 38% of respondents predict that more than 80% of the travel volume seen in 2019 will be reached, and a majority (70%) believe that it will take until 2025 to reach over 80% of the 2019 travel volume.
- For specific destinations, out-of-country travel has recovered much more slowly than in-country: Australia reached 36% of its pre-pandemic volumes, Canada 27%, and the USA 9%. A gradual rebound is expected to start in 2023.



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