

Student Travel Business Barometer: 2023

Welcome to the **2023 Student Travel Business Barometer Survey**. This is an **invitation-only survey** which measures **in-country and out-of-country 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 9, 2024**.

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

Yours sincerely,

Carylann Assante, CAE
Chief Executive Officer, SYTA

Ivana Bartosik
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**.

» Respondent Profile

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*)
- Motor Coach Company
- Other (please specify):

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

In-country travel refers to any trip conducted within the students' own country.

Out-of-country travel refers to any trip which includes traveling from one country to another.

*

- In-country trips
- Out-of-country trips
- Both in-country and out-of-country trips

4) Does your company also serve as an inbound (receptive) tour operator for international students?

- Yes
- No

5) If you serve as an inbound tour operator, please list up to the top 5 countries you work with and approximately how many travelers came through this channel in 2023:

	Country	Number of travelers
1.		
2.		
3.		
4.		
5.		

» In-country Trips: Demand and Market Trends

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6) How many travelers traveled with your organization in 2019?

Note: This question aims to assess the industry's performance relative to its pre-pandemic state. In essence, it seeks to understand the extent of the sector's recovery following the pandemic.

7) How many travelers did you expect to travel with your organization in 2023 and how many did actually travel?

Note: Please state how many travelers booked in-country trips with your organization for 2023 and how many actually traveled (i.e. expected volume vs real volume in 2023)?

Number of travelers expected to travel in 2023: _____

Number of travelers who actually traveled in 2023: _____

8) Please estimate how much (%) of the business originated in the country where your organization is based and how much outside of it:

In-country: _____

Outside of country: _____

9) For in-country trips in 2023, 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 travelers do you expect to travel with your organization in 2024?

Number of travelers expected to travel in 2024: _____

11) What percentage of your travelers changed their 2023 in-country travel plans as follows?

Note: Percentages must add up to 100%.

No change, traveled as planned _____

Changed destination _____

Changed trip parameters (e.g. shortened the trip) _____

Postponed to 2024 _____

Postponed to 2025 _____

Canceled _____

Other _____

12) In 2023, what was the average price for in-country trip price and individual costs for the following trip types?

Note: Absolute values, per person, US\$.

T1 destinations: These are the largest and most influential cities in the country. Examples include New York City, London, Paris or Singapore. These cities have large populations, and significant economic activity, and play a central role in various aspects of national life.

	One-day trip in T1 destination	Multi-day local/regional trip (without air travel) Price per day	Multi-day interstate trip (with air travel) Price per day
Total trip cost			
Accommodation			
Admission fee			
Meals			
Insurance			
Air transportation			
Transportation by bus/train			

13) For travel in 2024, how much do you expect demand for the following in-country trip types to change compared to 2023?

One-day trips -100
 _____ [] _____
 100

Overnight trips -100
 _____ [] _____
 100

Multi-day local trips (within the same city) -100
 _____ [] _____
 100

Multi-day regional trips (within the same state)	-100	[]
	100	
Multi-day interstate trips	-100	[]
	100	

14) For in-country trips executed in 2023, what share of your travelers traveled to the following destinations?

Note: Percentages must add up to 100%.

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

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

1. Destination: _____
2. Destination: _____
3. Destination: _____
4. Destination: _____
5. Destination: _____

16) What percentage (%) of your students chose the following in-country student group tours in 2023?

Note: Percentages must add up to 100%.

Adventure /Discovery	
Community service/Volunteering	
Cultural/Language	
Educational	
Leisure	
Performance Arts/Music	
School/College tours	
Sports	
Other	

17) In 2023, how many trips did your company organize that required accessibility elements?

Note: Accessible Travel/Tourism is tourism and travel that is accessible to all people, with disabilities or not, including those with mobility, hearing, sight, cognitive, or intellectual and psychosocial disabilities, older persons and those with temporary disabilities. (UNWTO, 2017)

18) How many travelers travelled with your organization in 2019?

Note: This question aims to assess the industry's performance relative to its pre-pandemic state. In essence, it seeks to understand the extent of the sector's recovery following the pandemic.

19) How many travelers did you expect to travel abroad with your organization in 2023 and how many did actually travel?

Note: Please state how many travelers booked out-of-country trips with your organization for 2023 and how many did actually travel (i.e. expected volume vs real volume in 2023)?

Number of travelers expected to travel in 2023: _____

Number of travelers who actually traveled in 2023: _____

20) For out-of-country trips in 2023, what was the average trip duration (in days) and group size?

Average trip duration (in days): _____

Average number of students per group: _____

21) How many students do you expect to travel abroad with your organization in 2024?

Number of travelers expected to travel in 2024: _____

22) What percentage of travelers changed their 2023 out-of-country 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 2024 _____

Postponed to 2025 _____

Canceled _____

Other _____

23) In 2023, what was the average price for out-of-country trip price and individual costs for the following trip types?

Note: Absolute values, per person, US\$.

T1 destination refers to well-established and popular travel spots that have a long history of attracting tourists. These places are often known for their iconic landmarks, rich cultural heritage, and widespread recognition. T1 destinations may include major global cities like London, Paris, New York City, Rome, and Tokyo.

T2 destination is less-known or off-the-beaten-path locations that are gaining popularity among travelers seeking unique and less

crowded experiences. These destinations can be in smaller towns, rural areas, or emerging travel hotspots that may not have the same level of tourist infrastructure as traditional destinations.

	Multi-day out-of-country trip to T1 destination (with air travel) Price per day	Multi-day out-of-country trip to T2 destination (with air travel) Price per day
Total trip cost		
Accommodation		
Admission fee		
Meals		
Insurance		
Air transportation		
Transportation by bus/train		

24) If you executed any out-of-country trips in 2023, please estimate the percentage of trips that went to the following destinations.

Note: Percentages must add up to 100%.

North America & Central America

USA:

Canada:

Mexico:

Central America:

Europe

France:

Germany:

Italy:

Spain:

UK:

Other:

Asia

China:

- Hong Kong:
- Japan:
- Malaysia:
- South Korea:
- Thailand:
- Vietnam:
- Other:
- South America**
- Argentina:
- Brazil:
- Colombia:
- Ecuador:
- Chile:
- Peru:
- Venezuela:
- Other:
- Africa**
- Morocco:
- Egypt:
- Kenya:
- Ghana:
- Mali:
- Tanzania/Zanzibar:
- Botswana:
- Zimbabwe/Zambia:
- South Africa:
- Mauritius:
- Seychelles:
- Other:
- Australia and New Zealand**
- Australia:
- New Zealand:
- Other:

25) For travel in 2024, how much do you expect demand for the following international student travel destinations to change compared to 2023?

Australia	-100	[]	100
Canada	-100	[]	100
China	-100	[]	100
France	-100	[]	100
Germany	-100	[]	100
Italy	-100	[]	100
Spain	-100	[]	100
UK	-100	[]	100

USA	-100	[]	100
South America	-100	[]	100
Africa	-100	[]	100

» **Transportation** | Student Travel
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26) Do you work with a third-party ground operator who books motorcoaches for your groups?

Yes
No
Sometimes

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

Yes
No
Sometimes

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

Yes
No
Sometimes

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

Yes
No
Sometimes

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

Yes
No
Sometimes

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

Yes
No
Sometimes

32) Do you book motorcoaches for day trips?

Yes

No

Sometimes

33) Do you see more requests for motorcoach trips compared to air?

Yes

No

I do not know

34) If you would like to receive the full 2023 Student Travel Business Barometer, please leave your email address below

Organization name:

E-mail address:

Thank you for your time & inputs
