



Student & Youth Travel Digest

A COMPREHENSIVE SURVEY OF THE STUDENT TRAVEL MARKET



Teach&Travel
The Official Publication of SYTA



PART 3: INBOUND STUDENT GROUP TRAVEL TO THE U.S.

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.

Previously, the *Student & Youth Travel Digest* report series introduced U.S. teachers' perspectives on the student group travel market. Educators helped document its size and value, student preferences, trip organization process and social impact, shedding light on domestic and outbound student group travel.

To provide a truly complete picture, the initiative also focused on inbound student trips to the U.S. Because incoming travel represents a sizeable segment of the U.S. market, international tour operators were queried about the volume of U.S. travel, preferred destinations, trip content and spending of international student groups.

As a result, this report delivers comprehensive insight into inbound student group travel to the U.S. and aims to delve into its distinctive characteristics, which often vary considerably from domestic tour specifics. International travel functions within its own annual cycle, meaning trips happen in different time periods and marketing to these groups calls for a different timing and approach than to U.S. student groups.

The potential and value of a thorough inbound travel market analysis for receptive travel providers is substantial. For 23% of U.S. tour operators approached within this research, incoming travel represents a major part of their business.

SYTA sees this report, providing a first-ever analysis of inbound student group travel to the U.S., as a fundamental tool to inform its members of opportunities in the international market.

Carylann Assante

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Executive Director, SYTA

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Publisher, *Teach & Travel* magazine

RESEARCH METHODOLOGY

This report draws from data generated as part of a global survey carried out between August 2013 and November 2015, which included international student tour operator participation.

The *Student & Youth Travel Digest: Part 3: Inbound Student Group Travel to the U.S.* report is based on input from 437 tour operators, representing over 200,000 young travelers from 70 countries all around the globe.

The diversity of this research is defined not just by the wide array of countries represented by these operators, but also by their experience in various areas of the travel market and involvement with travelers of different ages. Still, the focus remains on the 10-18 age group.

The extensive respondent pool allowed for a regional comparison throughout the report, revealing differences among selected regions and their U.S. inbound student group travel characteristics.

For research purposes, the process further involved standardization — the development of a universally applicable definition of a student group trip:

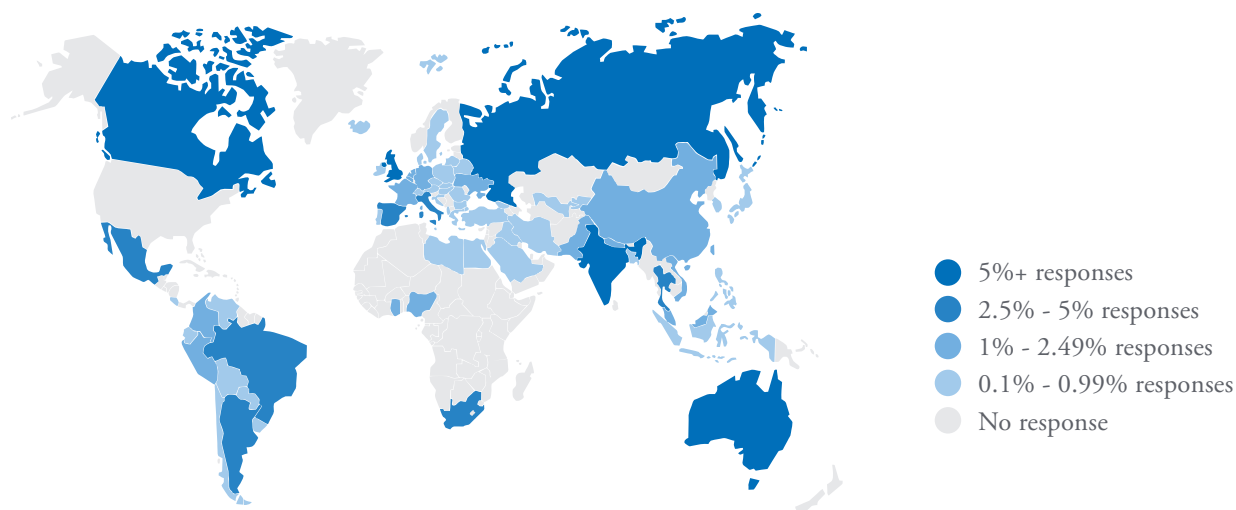
“A journey undertaken by a group of at least two unrelated people, usually classmates or peers, traveling out of their local area or day-to-day environment on the same dates and following the same itinerary. Such groups are often led and pre-organized by a teacher or group leader, largely to enrich their 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.

RESPONDENT PROFILE

» RESPONDENTS BY COUNTRY



TOP 12 COUNTRIES FOR RESPONSES: India (7.8%), Canada (6.6%), Australia (6.4%), Russia (5.5%), UK (5.5%), Brazil (4.8%), Italy (4.6%), Spain (3.4%), Argentina (3.2%), South Africa (2.8%), Thailand (2.8%), Mexico (2.5%).



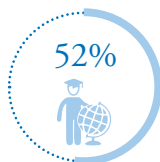
International tour operators brought a global perspective to this student group travel study. The characteristics and preferences of their U.S. trips differ from the student group travel coordinated by domestic organizers, and thus allow for a comparative overview of this sector.

The respondents from 70 countries were evenly located on all continents, with the greatest representation in Europe and Asia.

Over half of the responses received came from student agencies. The balance was provided by tour operators, student tour operators, travel agencies and general sales agents.

» RESPONDENTS BY CATEGORY

Student agency



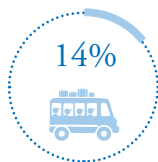
= an organization that promotes student travel programs put together by tour operators and other student travel organizers.

Tour operator



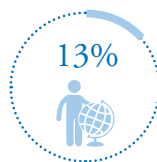
= an organization that makes travel arrangements including organizing tours or trips, and creating package holidays.

Student tour operator



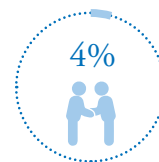
= a specialized tour operator, the majority of whose business (three-quarters) is from student travel.

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.

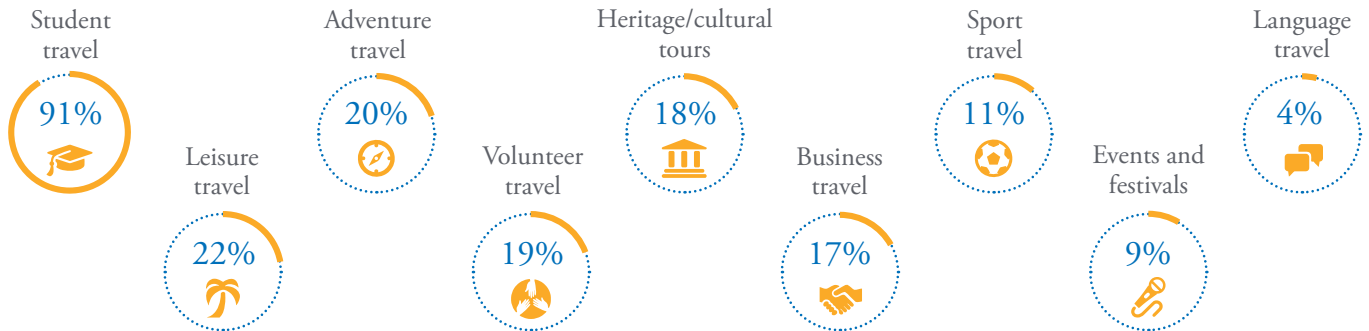
Definitions

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

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

RESPONDENT PROFILE

» RESPONDENTS BY MAJOR SECTOR OF TRAVEL THEY REPRESENT

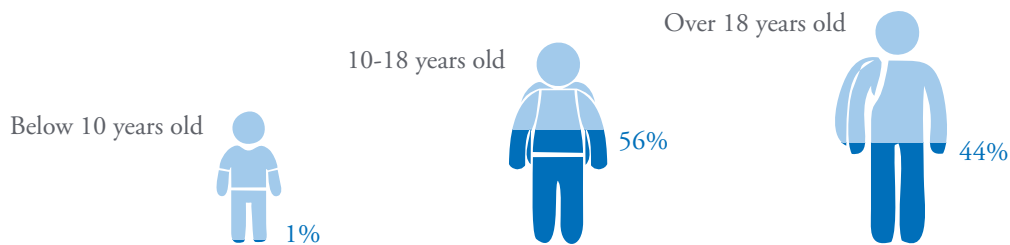


**Multiple Choice Question*

The respondents organize travel for various age groups. Only responses from those involved, to any extent, in student group travel have been included in this study. The main focus of the research was on travel for the 10-18 age group, which

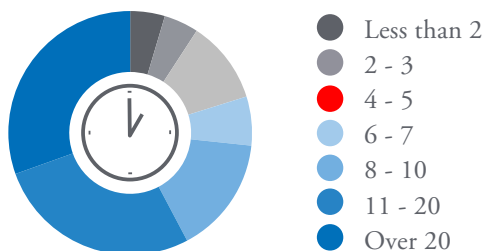
represents the main pool of customers for 56% of respondents. The rest of the respondents, primarily dealing with travelers outside of this age group, have also been included in the research analyses.

» RESPONDENTS BY PRIMARY AGE GROUP SERVED



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

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

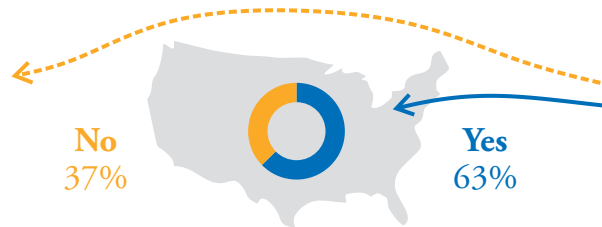


The global supply (outbound student travel companies) comprises tour operators and travel agencies with a diverse student group travel organization experience — 31% have over 20 years of experience in this field.

Involvement of international companies in student group travel has relatively younger roots compared to the U.S. tour operators, whose experience of over 20 years stands at 58%.

DEMAND FOR STUDENT GROUP TRAVEL TO THE U.S.

» U.S. AS A TARGET DESTINATION FOR TOUR OPERATORS



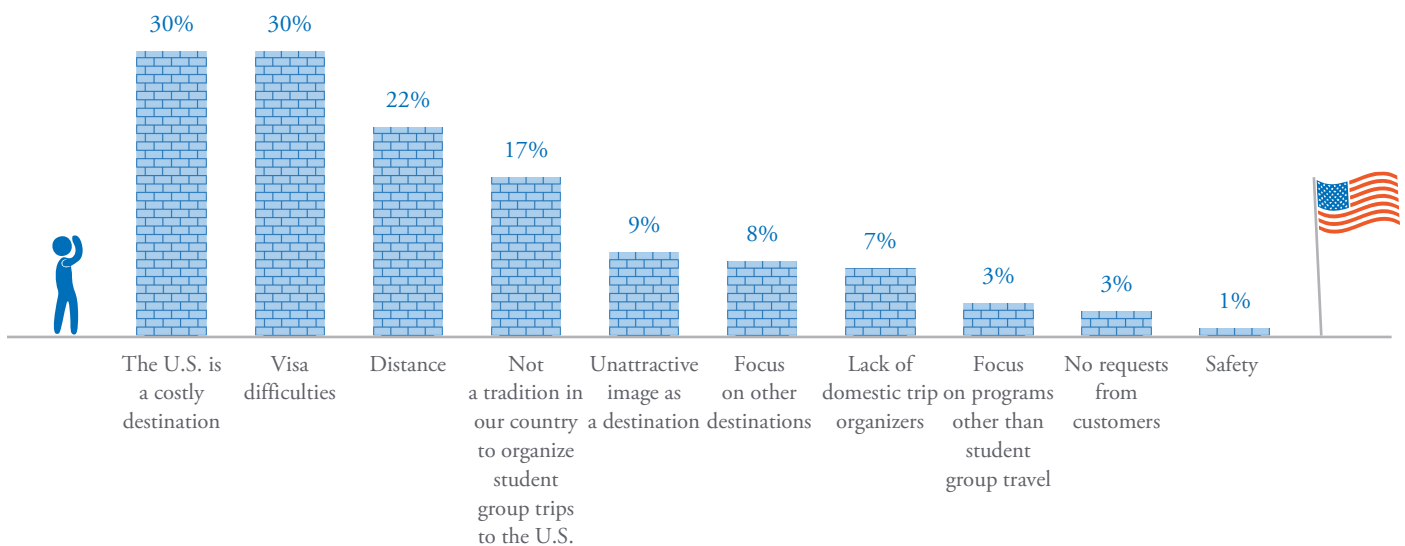
Over one-third (37%) of all tour operators organizing student group travel do not send their groups to the U.S. The highest share of these tour operators in the respondent pool were from the Netherlands, South Africa and Brazil.

Tour operators cite high costs and visa difficulties as the main reasons for not organizing student group travel to the U.S.

For respondents primarily from Europe, distance also discourages them from organizing trips to the U.S.

Furthermore, 11% of all respondents not organizing trips to the U.S. focus either on other destinations or programs other than student group travel. 1% of respondents cite safety as a reason they do not travel to the U.S.

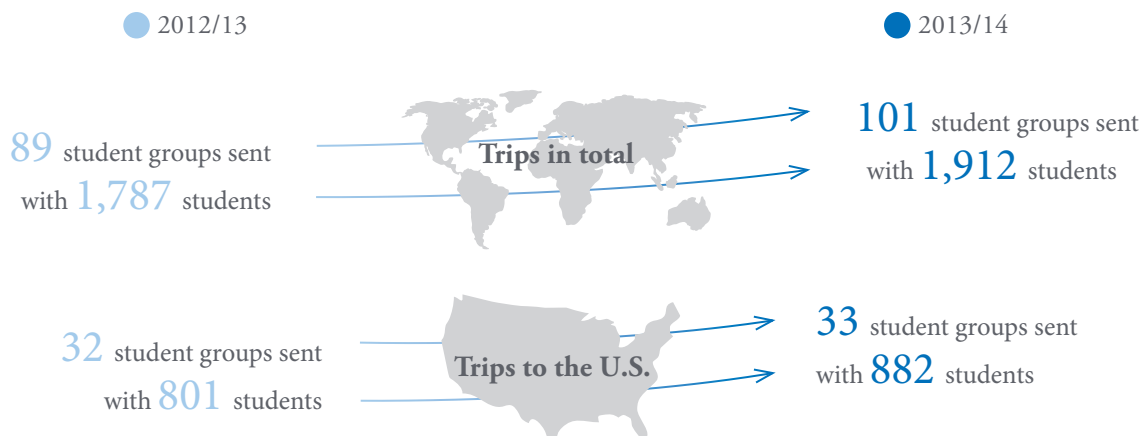
» REASONS WHY TOUR OPERATORS DO NOT SEND STUDENT GROUPS TO THE U.S.



**Multiple Choice Question*

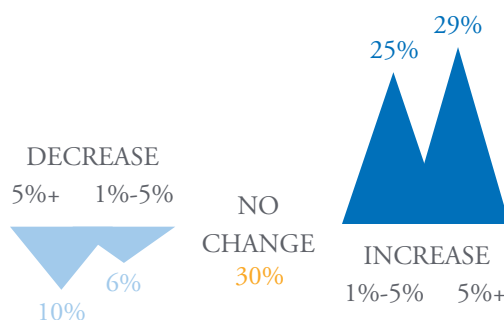
VOLUME OF STUDENT GROUP TRAVEL TO THE U.S.

» **AVERAGE** NUMBER OF STUDENT GROUPS AND STUDENTS SENT ABROAD PER YEAR BY A TOUR OPERATOR



Simultaneously, the number of groups sent specifically to the U.S. only increased by 3%, while the number of U.S. inbound travelers was up 10%.

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



Looking at the tour operators' predictions, 54% of them expected an increase in the demand for student group trips, as compared to academic years 2013/14 and 2014/15.

These positive growth predictions match the expectations stated

by U.S. trip organizers. (For more details, please refer to *Student & Youth Travel Digest: U.S. Student Group Travel Led by Teachers.*)

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

TRAVEL CONTENT PREFERENCES

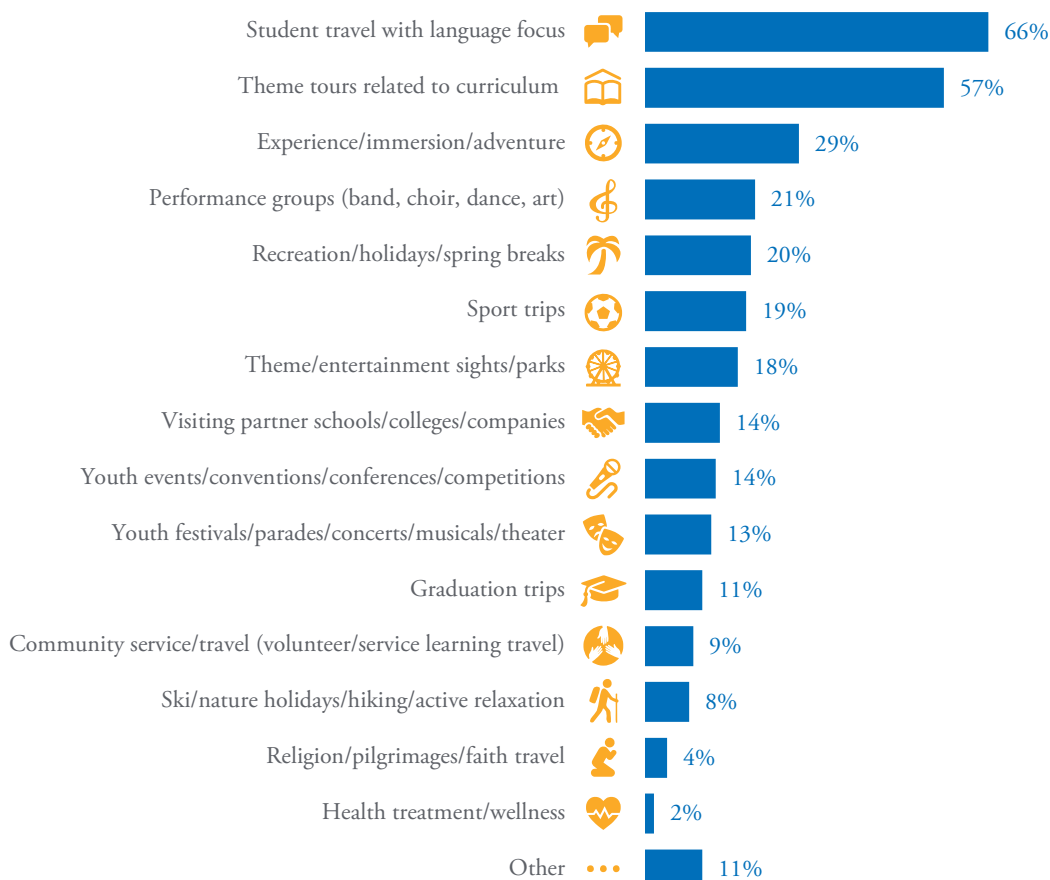
» PURPOSE OF STUDENT TRAVEL TO THE U.S.



The research revealed that the vast majority of the international student groups prefer trips with an educational component. Specifically, reasons for coming to the U.S. as a part of a group trip are language immersion (66%) and curriculum enhancement (57%).

The highest share of curriculum-related tours (19%) are organized by Canadian tour operators. They also organize the leading share of experience/immersion/adventure travel and performance group travel, which are among the most preferred categories of student group trips.

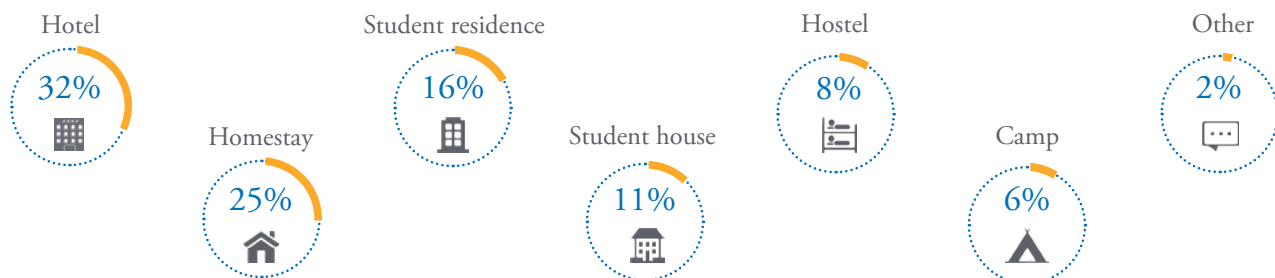
» TRIP PROGRAM PREFERENCES



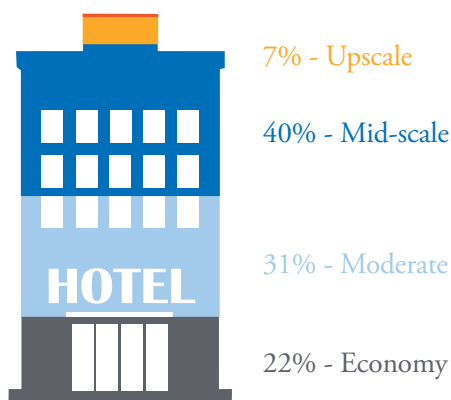
**Multiple Choice Question*

ACCOMMODATION PREFERENCES

» PREFERRED ACCOMMODATION TYPE



» PREFERRED CATEGORIES OF HOTEL ACCOMMODATION



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

As with U.S. domestic travel groups, hotels are the most commonly utilized accommodation option for international groups. Student groups prefer moderate and mid-scale hotel categories, while upscale and luxury hotels are seldom chosen.

The preference toward hotel accommodation is strongest if the travel is related to performance or curriculum.

In contrast to U.S. student groups, for which hotel accommodation is the preferred choice for 92%, other accommodation types gain importance for student groups from abroad. Namely, the popularity of language immersion programs translates into a higher usage of homestay accommodation.

» TRIP PRICE PER STUDENT



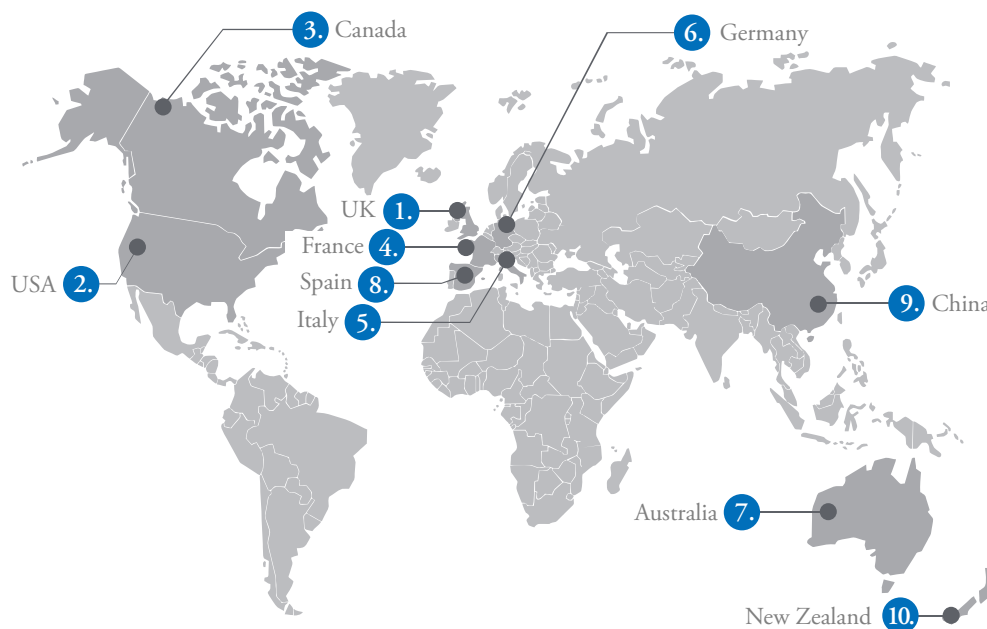
The price includes all local transportation (no flight tickets), meals, accommodation, insurance and admission fees.

Average trip price (for one week, two week and three week trips), reported by international tour operators who primarily focus on the 10-18 age group, is higher (by 6% – 19%, depending on the trip length) than the average trip price reported by tour operators

with a main customer base of over 18 years old. While 10-18 year old groups stay mostly in hotels (46%), the 18+ groups prefer homestay accommodation (28%) or a student house (21%), which results in lower trip costs for older travelers.

PREFERRED INTERNATIONAL DESTINATIONS

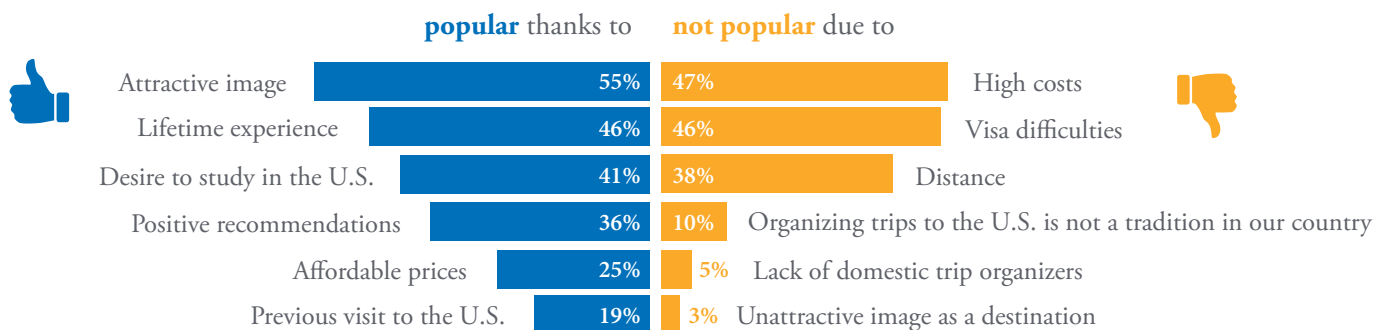
» 10 MOST PREFERRED DESTINATIONS ACCORDING TO TOUR OPERATORS WORLDWIDE



Tour operators' top 10 student group travel destination rankings are led by English-speaking countries. When taking into consideration preferences of all tour operators, including those who are U.S. based, the UK is the most popular destination for student group travel.

The distance, and consequently the price, plays an important role when deciding the actual trip destination. Tour operators from Europe report a preference toward visiting European countries, mainly the UK. The U.S. is among their top 10 destinations; however, it is not the first-ranked destination for European young travelers.

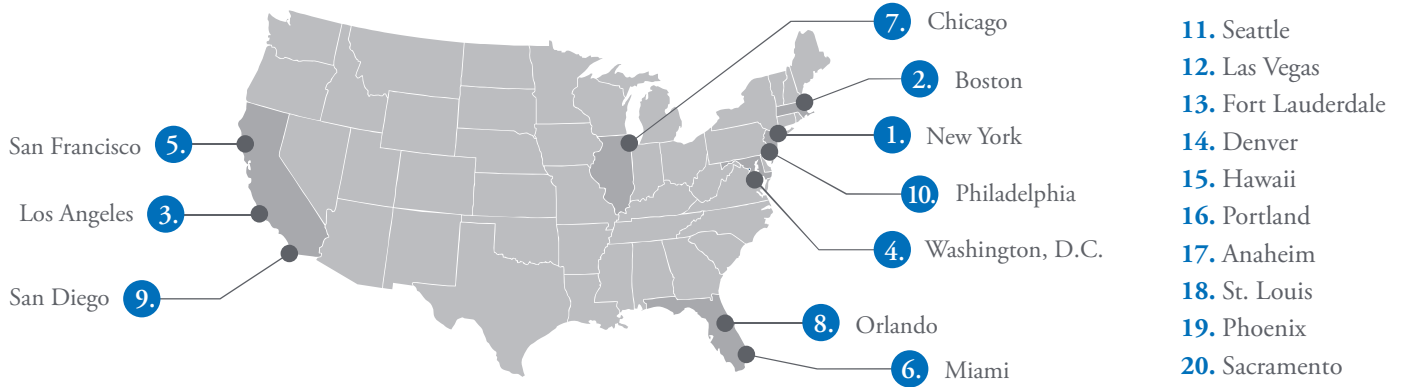
» AS A STUDENT GROUP TRAVEL DESTINATION, THE U.S. IS....



*Multiple Choice Question

U.S. AS A DESTINATION FOR INBOUND STUDENT GROUP TRAVEL

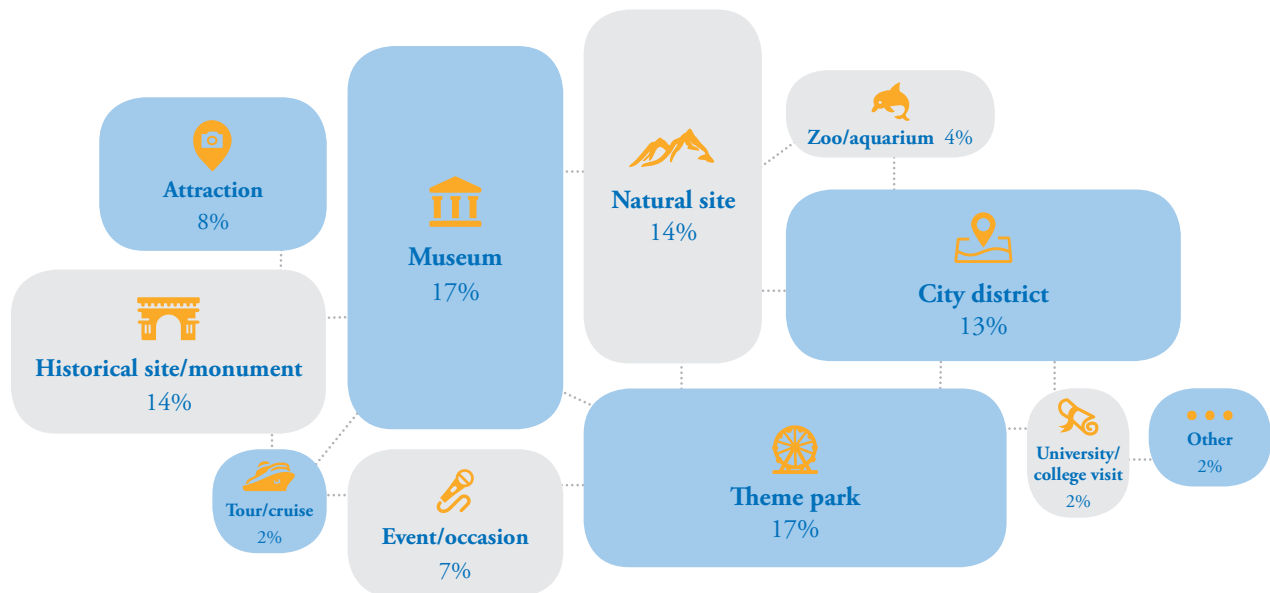
» 20 MOST PREFERRED U.S. DESTINATIONS ACCORDING TO INTERNATIONAL TOUR OPERATORS



Destination preferences of international students coming to the U.S. tend to vary when compared to travel patterns of U.S. domestic groups. For instance, Washington, D.C., is the fourth most popular destination for international groups, while it is

the No. 1 destination for the U.S. groups, primarily due to its significant historical relevance to the country. Los Angeles is more popular with international groups, whereas Orlando ranks higher for domestics groups.

» PERCENTAGE OF TRIPS BY TRIP CONTENT



TRIP SPECIFICS

» NUMBER OF DESTINATIONS VISITED ON AN INBOUND STUDENT GROUP TRIP TO THE U.S.



While international tour operators visit on average 2.8 destinations during an inbound trip to the U.S., U.S. tour operators' international trip itineraries contain on average 3.6 destinations, for a 30% richer program.

At the same time, groups that travel with international tour operators to the U.S. are smaller (27 students) than the U.S.

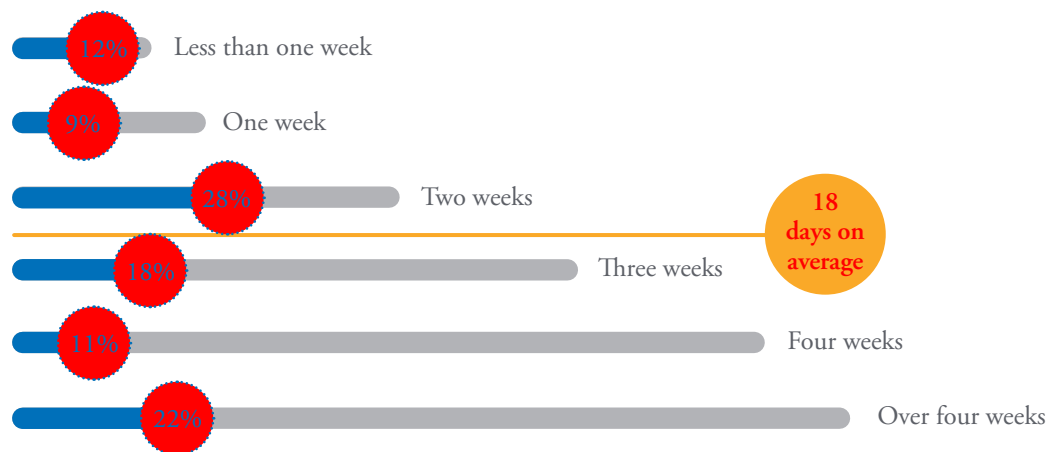
» AVERAGE GROUP SIZE OF INBOUND STUDENT GROUP TRAVEL TO THE U.S.



groups traveling abroad (43 students).

The smallest international groups are formed during inbound travel with a focus on community service (11 students in a group) and those with a language focus (18 students). Performance groups, usually the largest, visit the U.S. with 35 students on average.

» AVERAGE LENGTH OF STAY ON INBOUND STUDENT GROUP TRAVEL TO THE U.S.

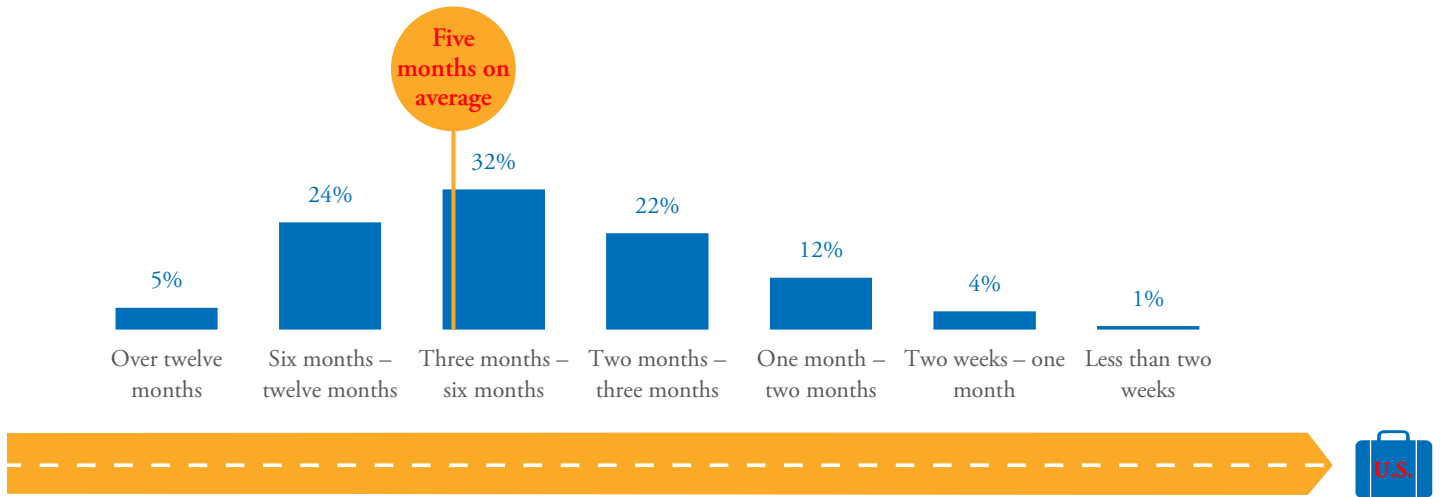


International student groups' average length of stay in the U.S. is longer (18 days) than the U.S. groups' length of stay abroad (nine days). Young visitors to the U.S. explore, on average, one destination per week; while the number of destinations visited by U.S. groups abroad in the same period averages out to almost three.

International tour operators with the main customer pool of students aged 10-18 stay for 15 days, while tour operators with students over 18 years old visit for 24 days. This results in a higher number of destinations (3.3 versus 2.5) visited by the second group.

TRIP BOOKING AND TIMING

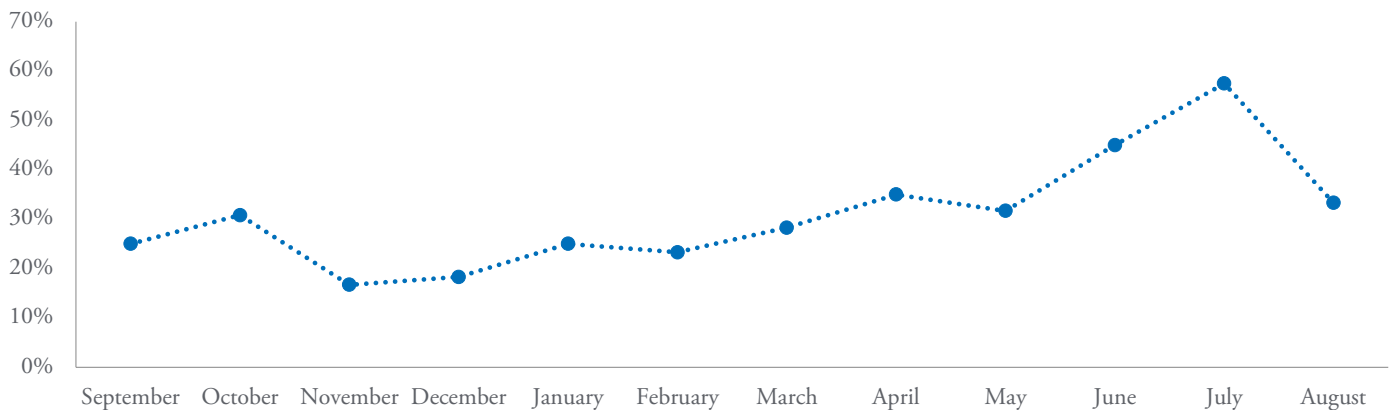
» BOOKING-LEAD TIME OF INBOUND STUDENT GROUP TRAVEL TO THE U.S.



Subsequently, trip reservations culminate from January to

February, with December to March being the marginal peak season for making bookings. Therefore, marketing to incoming groups should be timed to reflect this unique characteristic of international student group travel.

» PERCENTAGE OF TOUR OPERATORS LEADING STUDENT GROUP TRIPS BY MONTH



*Multiple Choice Question

REGIONAL COMPARISON

Characteristics and preferences of the inbound trips to the U.S. vary significantly by global regions:








- Canadian students arrive in two peak seasons during a year — spring and fall. On average, they stay less than a week.
- The longest trips are organized by tour operators from Latin

America. Their customers prefer homestay accommodation.

- Groups visiting from Asia are the smallest and, out of all regions, make reservations with the shortest lead times.
- European tour operators generally match the average characteristics and preferences of most categories.



REGIONAL COMPARISON

	Asia	Europe	Latin America	Canada
Preferred accommodation types				
Camp	9%	4%	6%	0%
Hotel	24%	30%	6%	93%
Hostel	16%	8%	1%	1%
Homestay	23%	23%	41%	1%
Student residence	12%	21%	25%	5%
Student house	12%	15%	17%	0%
Other	4%	0%	4%	0%
<i>*Percentages do not add up to 100% due to rounding</i>				
Group size	20 	22 	33 	41 
Length of stay (days)				
Top months for inbound trips to the U.S.	June – August	June – August	July, January – February	March – June, October – November
Booking-lead time (months)	3.3	4.9	5.4	6.8
Countries included in the regional comparison	Bangladesh, China, Georgia, Hong Kong, India, Indonesia, Japan, Kyrgyzstan, Malaysia, Nepal, Pakistan, Philippines, Singapore, South Korea, Taiwan, Thailand, Uzbekistan, Vietnam	Albania, Austria, Belarus, Belgium, Bulgaria, Croatia, Czech Republic, Denmark, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Lithuania, Malta, Netherlands, Poland, Portugal, Romania, Russia, Slovakia, Spain, Sweden, Switzerland, Ukraine, UK	Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Ecuador, Mexico, Paraguay, Peru, Uruguay, Venezuela	Canada

For more detailed analysis and breakdowns, please contact us at info@syta.org.



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

- 54% of international tour operators predicted growth in future demand for inbound student group travel to the U.S.
- Top three accommodation options for international student groups visiting the U.S. are hotels (32%), homestay (25%) and student residence (16%).
- Out of all respondents, 55% reported the U.S. as having an attractive image as a destination, and 41% stated student visitors desire future study in the U.S.
- On average, international tour operators organize travel to the U.S. with 27 students in a group, stay for 18 days and visit 2.8 destinations during a single trip.
- Bookings for international student group trips to the U.S. are normally made five months prior to travel. The high season for the trips is June — July.

CONTACT DETAILS: SYTA and SYTA Youth Foundation, 8400 Westpark Drive Mclean, Virginia 22102

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