Student Travel

BUSINESS BAROMETER

SYTA STUDENT TRAVEL RESEARCH

ANNUAL REPORT 2024

Student Travel
Business Barometer
Annual Report 2024

About us

SYTA is the premier association of businesses dedicated to providing life enhancing travel experiences to students and young people. SYTA Student Travel Research, the association's research brand, conducts independent research to provide global evidence of the size, trends, and importance of student travel to assist our members in achieving data driven strategies for building their businesses. The Student Travel Business Barometer is the only comprehensive quantitative study of year-on-year growth and forecast data for national and international tour operators who serve student and youth travelers.

To find out more about SYTA's research, please visit www.syta.org/ student-travel-research or connect with us on

BONARD is an independent market research provider with more than 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 member of ESOMAR World Research. For more information about the Barometer, please contact us at: ivana.bartosik@bonard.com.

To find out more about BONARD, please visit www.bonardeducation.com or connect with us on

Foreword

THE GOOD NEWS WE HAVE TO SHARE FROM THE 2024 STUDENT TRAVEL BUSINESS BAROMETER IS THAT THE STUDENT TRAVEL MARKET HAS STABILIZED, AND STUDENTS ARE TRAVELING AT PACE WITH OUR RECORD YEAR IN 2019.

Last year, in the 2023 Barometer, we completed a five-year cycle of data on global student travel that began in the record growth year of 2019, followed by the devastating decreases caused by the Covid-19 Pandemic beginning in 2020. In 2022 and 2023, we tracked the resilient student travel comeback, which set new benchmarks for student travel data.

In 2024, we have streamlined the Barometer data to reflect the stabilization of the market today. We have focused on U.S. travel to better represent the findings from our U.S. members, who represent the greatest number of respondents. We also were able to condense some data since there is renewed stability in travel patterns. For example, even though there was a 2% decline in in-country travel in the U.S. in 2024, this is not inconsistent, considering the significant increase we recorded from 2022 to 2023 due to pent up demand. Other stabilizing factors include the U.S. and the UK have regained their dominant position as outbound destinations for most travelers, and again, not surprisingly, costs continue to rise for travel, primarily for transportation, accommodations and meals.

The findings of the 2024 Student Travel Business Barometer are also affected by these trends that continue to dominate the student travel market:

Pent-Up Demand: In 2023 - the surge in travel was largely driven by pent-up demand from students eager to experience travel after the restrictions and cancellations during the pandemic that continued into 2024. Many students who had postponed their plans were finally able to travel, leading to a significant increase in bookings.

Economic Factors: In 2024, economic uncertainties played a role in the decline reported in both in-country and out of country travel. Rising inflation, increased travel costs, and fluctuating currency exchange rates made travel less accessible for some students and their families and a reduced number of registrations per trip.

Changing Preferences: An abundance of travel opportunities and a strong push of both domestic and international travel in 2023 may have shifted the focus away from prioritizing school trips in 2024. Alternative experiences such as internships, sports, or other local activities have taken a bit of priority away from the urgency of travel.

Safety Concerns: Ongoing concerns related to health and safety, including the potential for new variants of viruses or geopolitical tensions, may have influenced students' and parents' decisions to travel internationally.

Competition and Offerings: The travel market in 2024 may have seen increased competition or changes in what tour operators are offering, leading students to choose different types of experiences or destinations that are perceived as safer or more cost-effective.

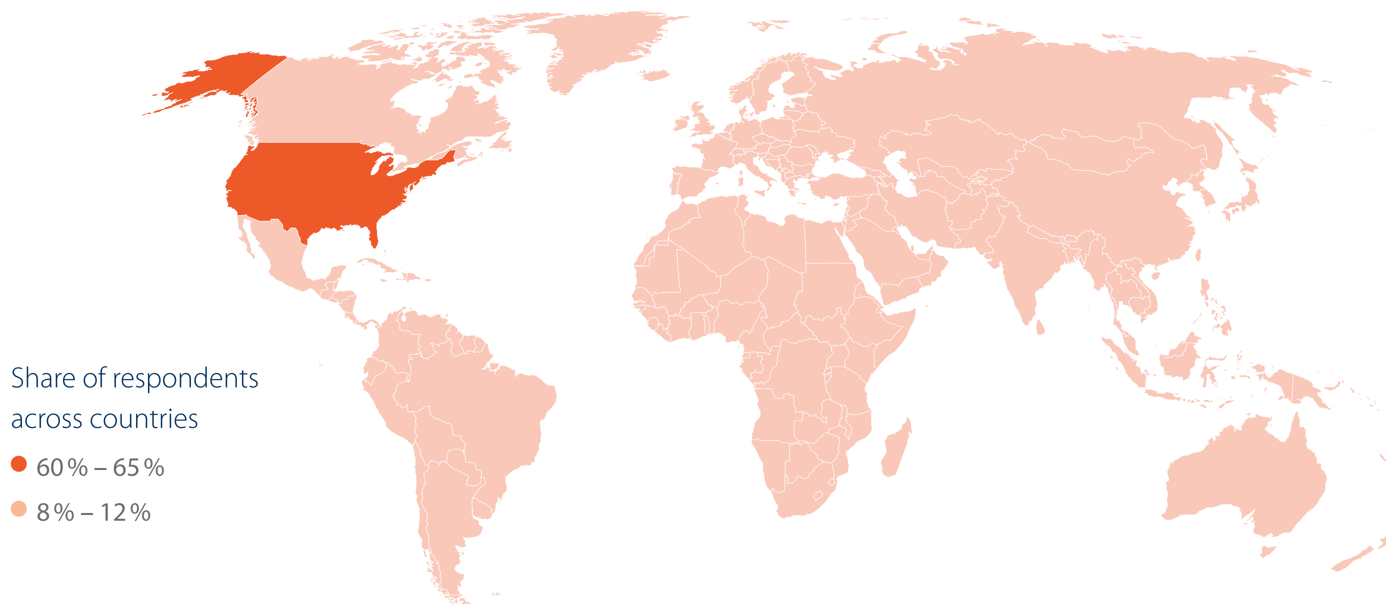
SYTA Travel Research is always looking for new and timely research product offerings to assist SYTA members to stay informed about the competitive landscape and to improve their businesses. The Student Travel Business Barometer will continue to change and adapt to current market conditions, yet maintain the fundamental, consistent data set. We believe this is important to give you the ability to benchmark your business against the rest of the industry and understand the significant role that student travel plays in the global travel market. We welcome your input at any time – please let us know what information has been helpful in this Barometer and what other information you would like us to explore.
Contact us at Cassante#SYTA.org. research@ syta.org

Carylann Assante, CAE
Chief Executive Officer
SYTA and the SYTA Youth Foundation

Introduction – 2024 Results

The 2024 Student Travel Business Barometer reflects an evolving landscape in student group travel, with 2023 serving as a new benchmark for industry performance. Following a strong post-pandemic recovery, 2023 set a milestone for student group travel, establishing a new reference point for measuring trends.

As a result, the 2024 report has adapted to align with these shifts, placing a stronger focus on the North America market, where student travel remains highly active. The findings are based on responses from 59 tour operators and travel and education agencies across nine countries, capturing key industry players and trends shaping student travel in 2024.



25% OF TOUR OPERATORS ORGANIZED **IN-COUNTRY TRIPS**

10% OF TOUR OPERATORS ORGANIZED **OUT-OF-COUNTRY TRIPS**

64% OF TOUR OPERATORS ORGANIZED **BOTH IN-COUNTRY AND OUT-OF-COUNTRY TRIPS**

- **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.

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.

Data collection was carried out between November 2024 and January 2025.

In-country travel

IN-COUNTRY STUDENT GROUP TRAVEL SAW A SLIGHT DECLINE IN 2024, WITH 848,000 STUDENTS TRAVELING DOMESTICALLY—FALLING SHORT OF THE FORECASTED 861,000. THIS WAS A 2% DROP FROM 2023, FOLLOWING THE POST-PANDEMIC SURGE IN TRAVEL. IN TERMS OF RECOVERY FOR 2024, IN-COUNTRY TRAVEL REACHED 104% OF THEIR 2019 VOLUME.

Several factors contributed to this trend, particularly economic pressures. Rising costs made schools and parents more cautious with travel budgets, leading to shorter trips, closer destinations, and more selective planning. The pressure to travel at all costs was reduced after the 2023 year with a return to "regularly" scheduled school trips.

At the same time, younger travelers have cross-shopped travel experiences with other parts of their lives. Many families placed greater emphasis on alternative educational experiences, such as focus on local activities, immersive learning programs and extracurricular activities, to provide meaningful experiences without the expense of long-distance in-country travel.

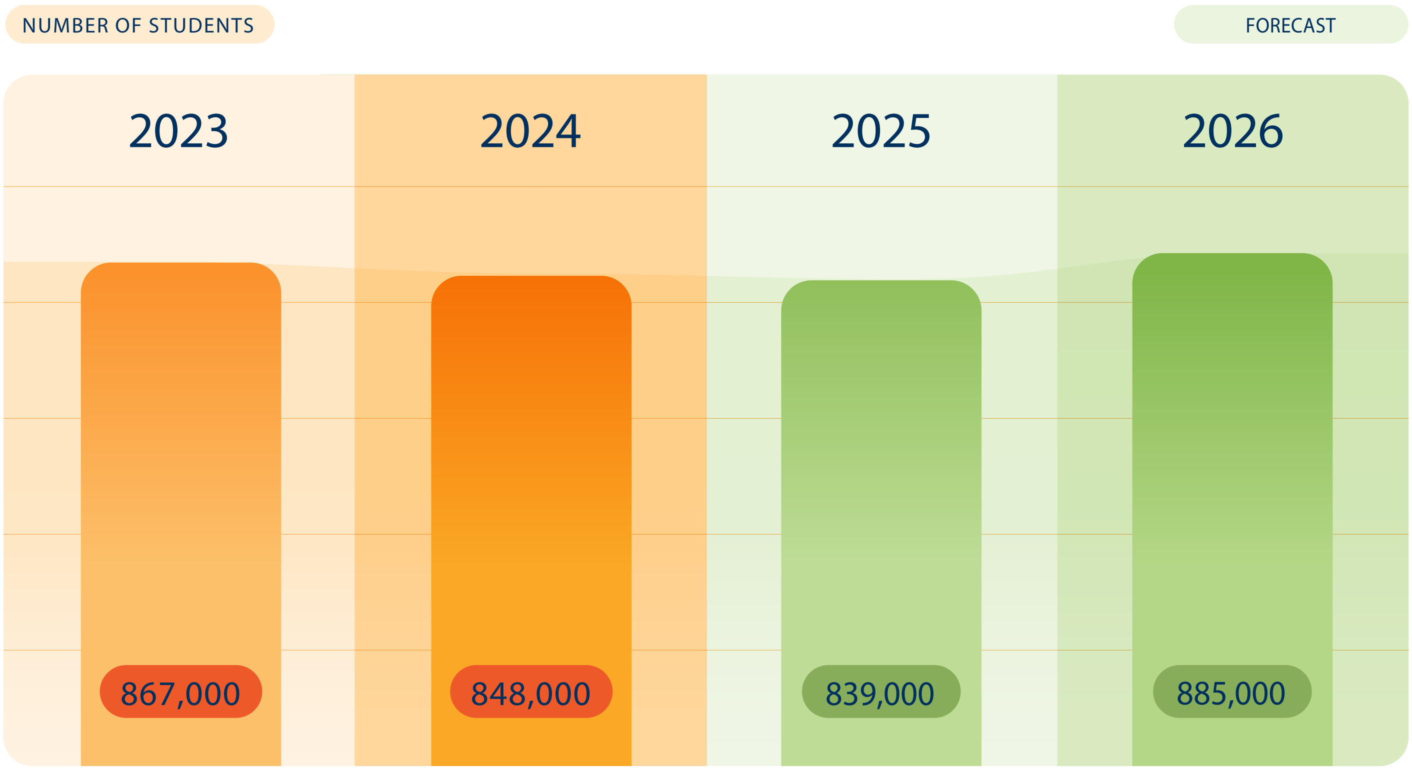
Performance arts/music tours (39%) and educational tours (38%) remained the top choices for student travel in 2024. Performance arts/music tours returned to the top as the most popular category, surpassing educational tours, as arts/music trips made a stronger comeback after a slower post-pandemic recovery. A growing interest in themed travel also emerged, with arts, sports, and science-focused trips gaining in popularity.

Although fewer students traveled, the average trip duration for in-country travel remained the same, showing minor change in trip formats. The typical student group had 55 students, down from the 2023 average of 62. This drop in group sizes is a result of lower registration numbers due to smaller class/band sizes and a general reluctance to travel that impacted on the number of students traveling per group.

In-country student travel is expected to decline further to 839,000 in 2025 before rising to 885,000 in 2026. The relatively flat expectations for 2025 reflect ongoing economic pressures and school budget constraints, which are leading to shorter or more local trips. By 2026, travel demand is expected to surpass both 2024 and 2025 levels.

Number of students taking in-country trips

(2023–2024 Actual, 2025–2026 Forecast)



Based on 53 STOs running in-country trips

STUDENTS EXPECTED TO TRAVEL IN 2024

861,000

STUDENTS

ACTUAL NUMBER OF STUDENTS TRAVELING

848,000

STUDENTS

DECREASE IN THE NUMBER OF STUDENTS TRAVELING

-2 %

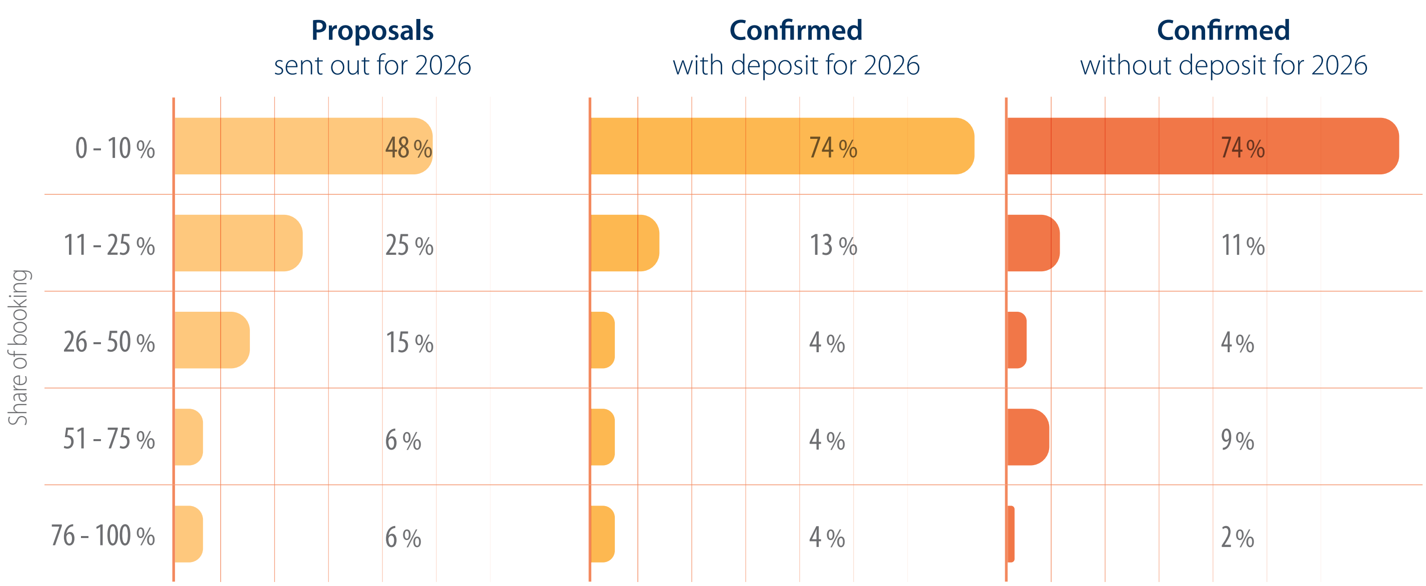
2024 vs 2023

PARTICIPATING TRAVEL AGENCIES EXPECTED MORE THAN 861,000 STUDENTS TO TRAVEL IN 2024, BUT ACTUALLY MOVED 848,000 STUDENTS.

In-country travel expected and confirmed bookings

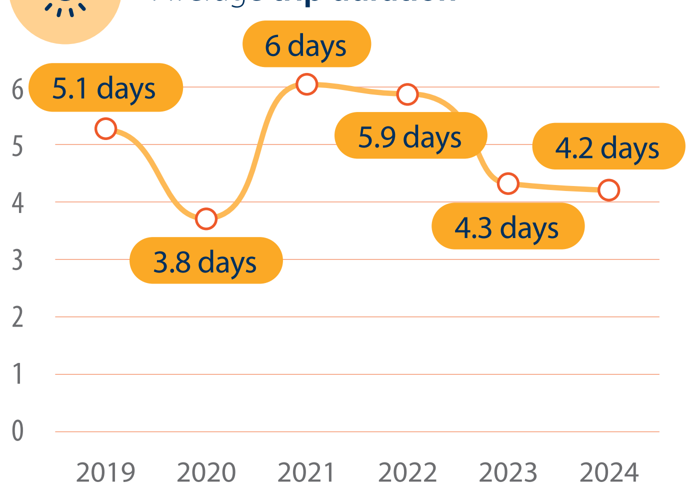
Early 2026 data shows that tour operators have a cautious approach to in-country student travel, with most tour operators still in the early planning stages. Seventy-three percent of operators reported sending proposals for only 0-25% of their expected bookings. For confirmed bookings, 74% of respondents reported that both bookings with and without deposits were in the 0-10% range.

Stages of booking activity for 2026 travel

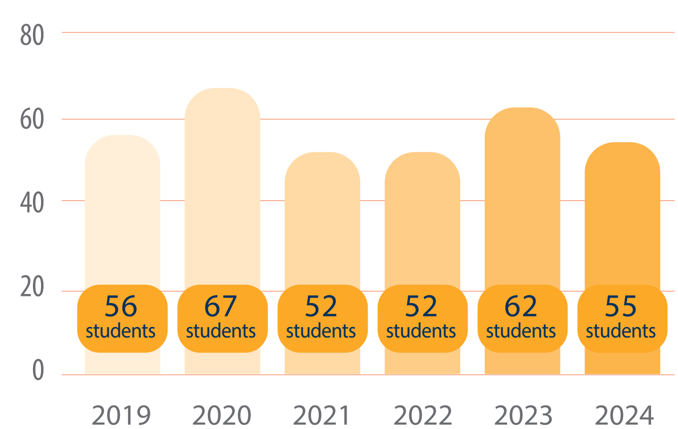


How to read the chart: 48% of respondents at the point of the survey had 0-10% of their bookings in proposals for 2026

Average **trip duration**



Average **group size**



Average trip prices per trip type in 2024

The average cost of in-country student travel increased in 2024 across all trip types, with higher accommodation, transportation, and meal expenses.

A one-day trip to a T1 destination now costs $248, with transportation ($79) and admission fees ($75) making up the majority of the cost. A three-day local/regional trip with ground transportation rose to $1,205, driven by higher accommodation costs ($250), meals ($412), and transportation ($130). A four-day interstate trip with ground transportation increased to $1,859, with the largest expenses coming from accommodation ($499) and meals ($601).

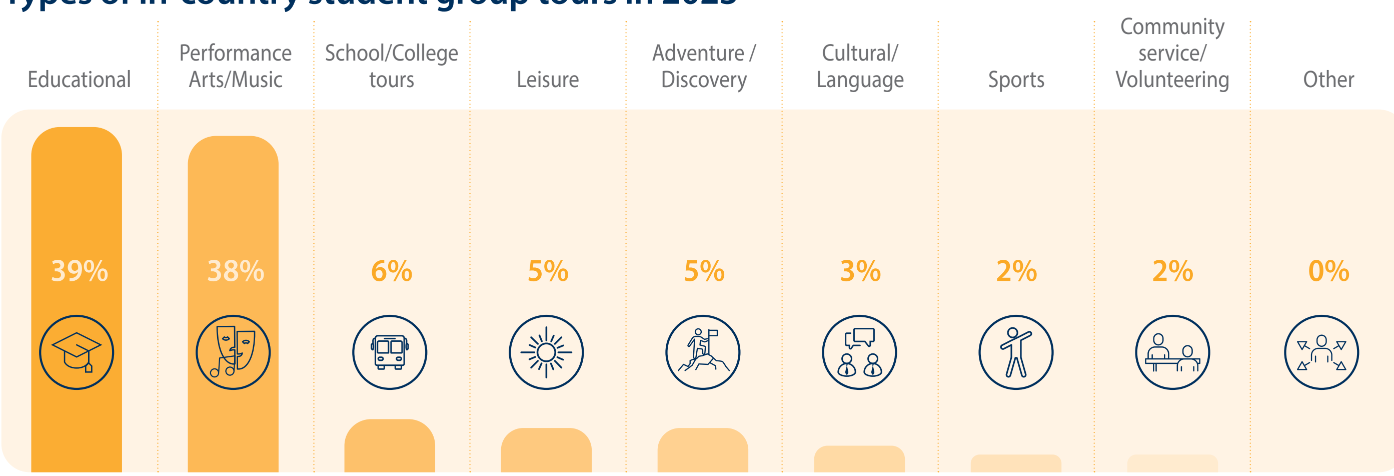
Compared to 2023, the biggest price increases were in local/regional trips and interstate travel, driven by rising overall costs, and inflation. Airfare for in-country student travel also saw a significant jump, making air travel a more expensive option in 2024. More schools had students registering directly with tour operators and making installment payments through online platforms to lessen the burden of increased costs.

	Total trip cost	Accommodation*	Admission fee	Meals	Insurance	Transportation
One-day trip in T1 destination	$248	n/a	$75	$71	$23	$79
3-days regional trip (with ground transportation)	$1,205	$250	$251	$412	$60	$130
4-days interstate trip (with ground transportation)	$1,859	$499	$487	$601	$124	$140
4-days interstate trip (with air travel)	$2,156	$499	$487	$601	$124	$374

Note: *Double occupancy, price per person*

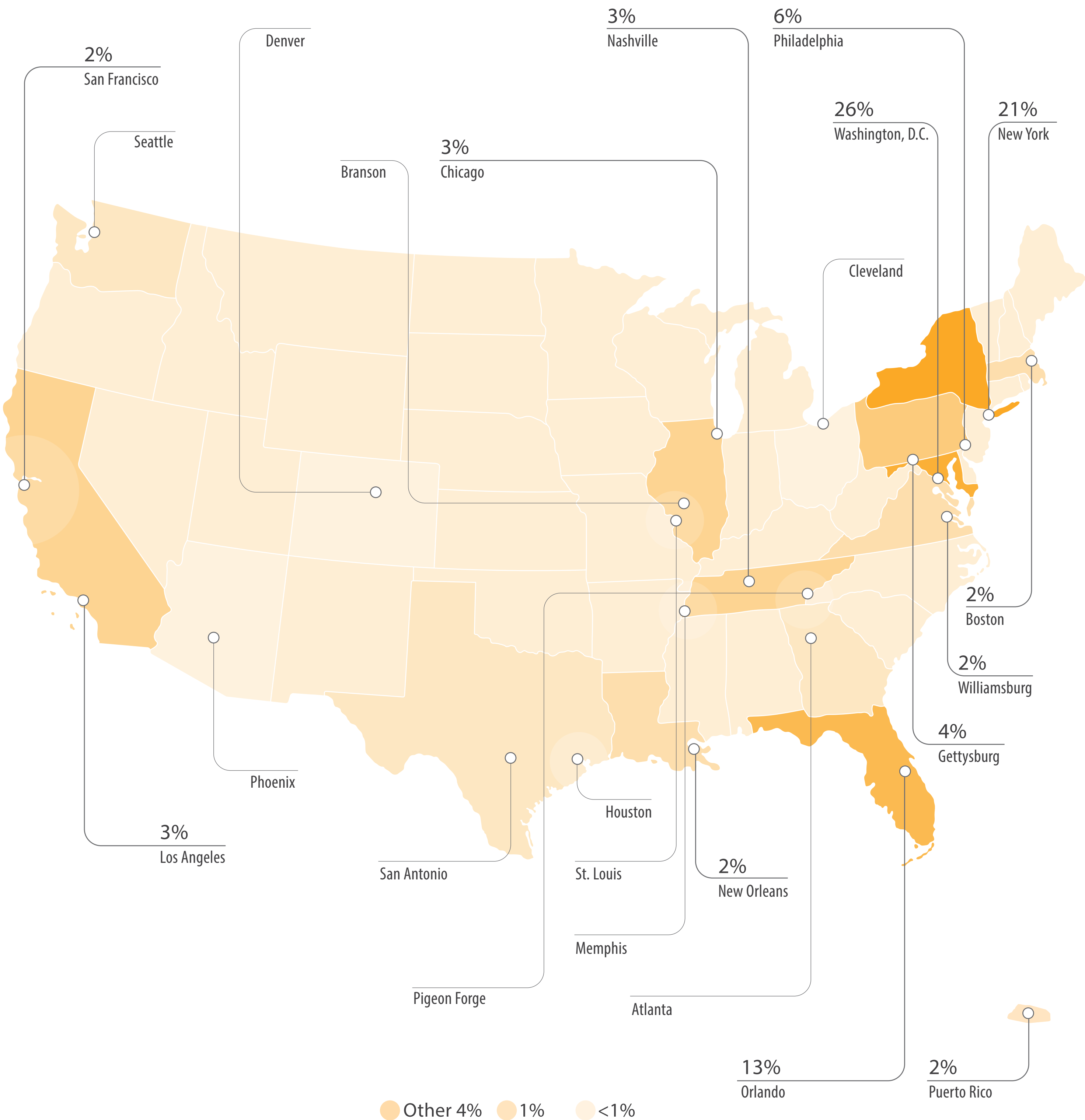
T1 destination refers to well-established and popular travel spots that have a long history of attracting tourists. These places are often known for their iconic landmarks, rich cultural heritage, and widespread recognition. T1 destinations may include major global cities like London, Paris, New York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

Types of in-country student group tours in 2023



USA – In-country destinations

Share of customers traveling to the following destinations



SYTA STUDENT TRAVEL RESEARCH

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Out-of-country travel

OUT-OF-COUNTRY STUDENT TRAVEL SAW A DECLINE IN 2024, WITH 176,000 STUDENTS TRAVELING OUT-OF-COUNTRY, DOWN FROM THE 184,000 FORECASTED FOR THE YEAR.

This 17% decrease from 2023 results from an expected decline in the initial post-pandemic recovery and the overall higher costs of travel internationally. Despite this decline from 2023, out-of-country travel surpassed 2019 volume by 32% as reported by surveyed tour operators.

Several factors contributed to this decline, especially rising costs, global economic uncertainty, and safety concerns for some regions. Schools and parents approached out-of-country travel with more caution, leading to fewer long-haul trips and a preference for Tier 2 destinations with lower overall costs and the perspective of being "safer".

The UK remained the most popular out-of-country destination for North American students, attracting 51% of out-of-country student travel. The USA (7%) and France (6%) followed, though both saw lower student travel volumes compared to past years. This is primarily based on responses from a cohort of participants, the majority of whom were based in North America.

Notably, destinations such as Italy (4%), Spain (4%), and Mexico (3%) maintained steady demand, while Germany (2%) and Australia (3%) remained stable choices for students seeking cultural and educational experiences.

While long-haul destinations, particularly in Asia, saw minimal representation due to rising airfares and lack of available flight connections, smaller, emerging markets in Central and Eastern Europe showed signs of growth (Slovenia, Switzerland, and parts of Central Europe).

The data shows that there is a widening gap between the more popular and expensive destinations and the lesser traveled, more cost-effective destinations. Tour operators reported that high-cost locations like Japan remain in demand. At the same time, however, lower-cost destinations such as Mexico and Ecuador are gaining popularity, as schools seek affordable alternatives that still offer cultural and educational value.

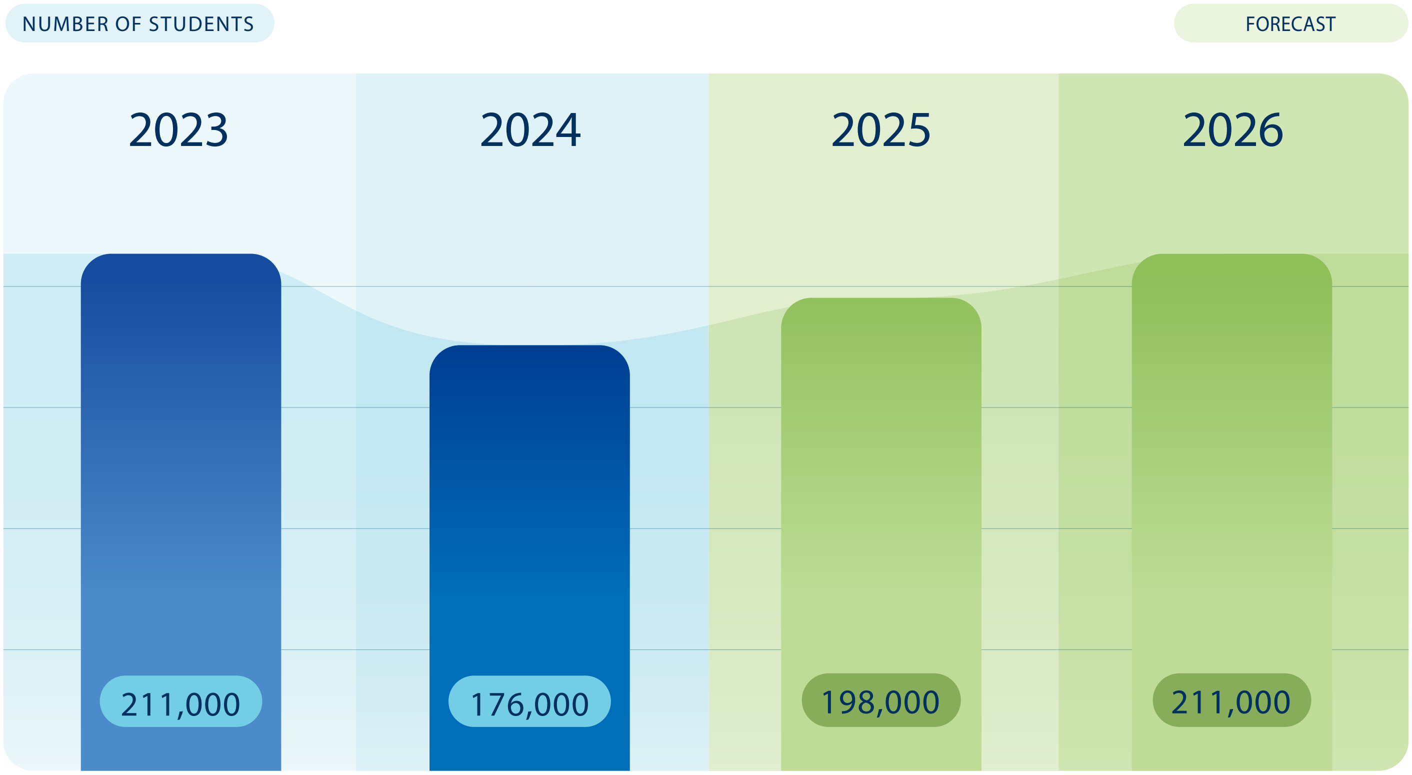
In 2024, the average duration of out-of-country student trips stayed at the same level as in 2023 – 8.6 days. The average group size also saw minor fluctuations, now consisting of 35 students per trip, down from 41 in 2023.

Out-of-country student travel is expected to stabilize in 2025 - a modest recovery is projected for 2026, as there is positive sentiment that schools will regain confidence in long-haul travel.

While the UK, USA, and Europe are expected to remain top destinations, there is potential for growth in non-traditional locations, especially if tour operators offer more affordable and flexible travel packages.

Number of students taking out-of-country trips

(2023–2024 Actual, 2025–2026 Forecast)



Based on 47 STOs running out-of-country trips.

STUDENTS EXPECTED TO TRAVEL IN 2024

184,000
STUDENTS

ACTUAL NUMBER OF STUDENTS TRAVELING

176,000
STUDENTS

INCREASE IN THE NUMBER OF STUDENTS TRAVELING

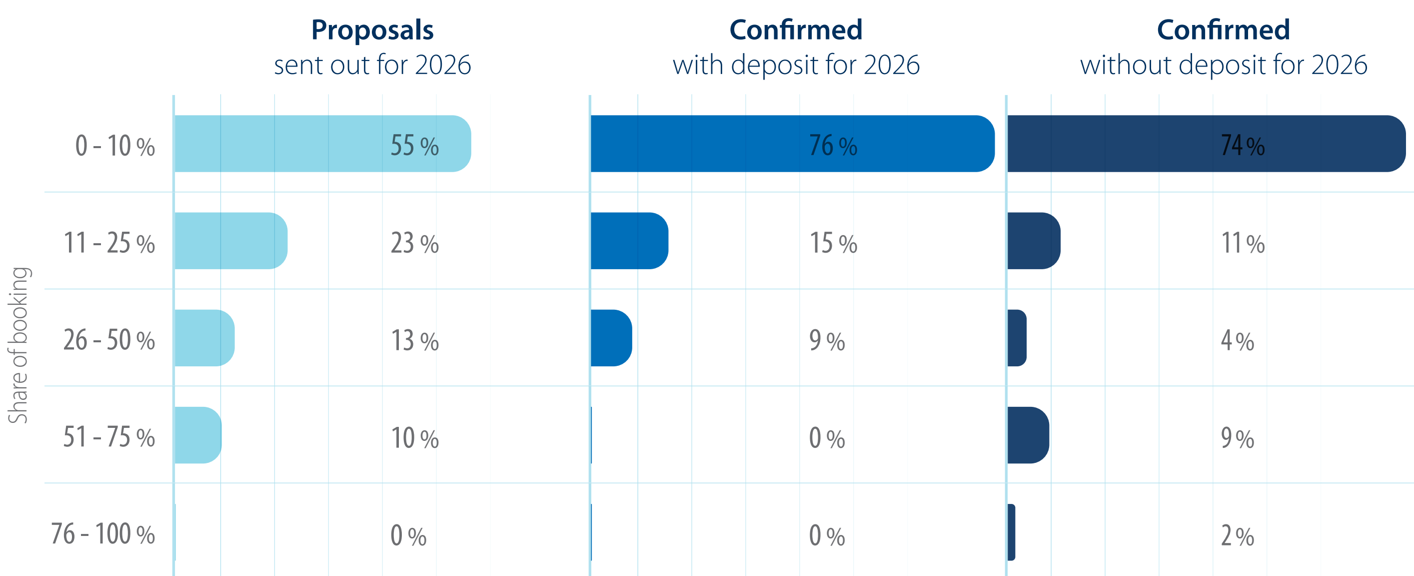
-17 %
2024 vs 2023

STUDENT TOUR OPERATORS ANTICIPATED 184,000 STUDENTS TRAVELING IN 2024. THE FORECAST WAS ALMOST RIGHT ON, WITH 176,000 STUDENTS ACTUALLY TAKING TRIPS.

Out-of-country travel expected and confirmed bookings

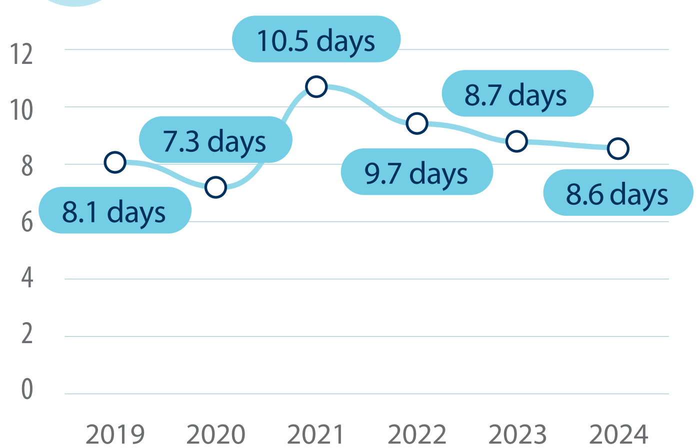
Early 2026 data indicates a cautious approach to out-of-country student travel, with most proposals and bookings still in the early stages. Fifty-five percent of tour operators have proposals for only 0-10% of expected booking. Seventy six percent of respondents reported that bookings with deposits represent only 0-10% of their total business volume.

Stages of booking activity for 2026 travel

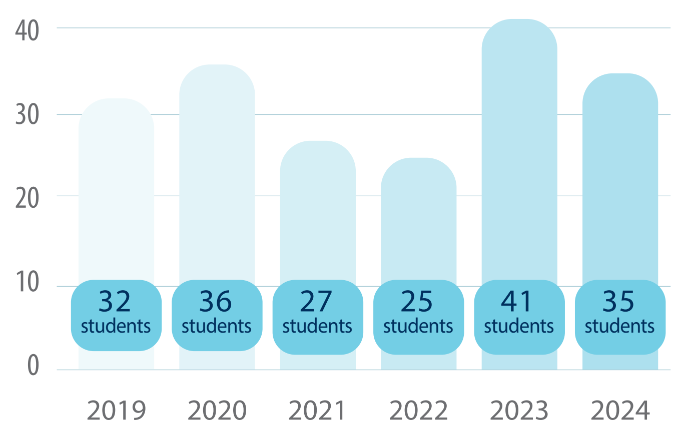


How to read the chart: 55% of respondents at the point of the survey had 0-10% of their bookings in proposals for 2026

Average **trip duration**



Average **group size**



Average trip prices per trip type in 2024

The cost of out-of-country student travel increased in 2024, with airfare and accommodation continuing to be the most significant expenses. Rising fuel prices, inflation, and higher operational costs contributed to the overall price surge, impacting both long-haul and regional student travel.

A 7-day trip to a T1 destination by air rose to $4,025, compared to $3,113 in 2023, marking a substantial increase in costs for the most popular and well-established student travel destinations, such as the UK, and France. Prices are constantly changing, adding to the complexity of travel planning. One key challenge is that trips are often booked 12 months or more in advance, making it difficult to accurately predict the final cost at the time of travel. With inflation and rising expenses having a greater impact than in the recent years, the cost of a trip can increase significantly over the course of a year, often ending up much higher than originally expected. Similarly, a 7-day trip by air to a T2 destination increased from $2,630 in 2023 to $3,260 in 2024. Ground transportation remained a more budget-friendly alternative, but even these costs climbed.

The cost of international student travel continues to rise, with airfare and accommodation remaining the most significant expenses. Increased flight connectivity post-pandemic is expected to open more travel options, potentially driving down costs over time. However, airline ticket prices remain high, which has led schools to be more selective with trip destinations.

	Total trip cost	Accommodation*	Admission fee	Meals	Insurance	Transportation
7-days out-of-country trip to T1 destination (with ground transportation)	$3,512	$471	$720	$1,472	$174	$189
7-days out-of-country trip to T1 destination (with air travel)	$4,025	$471	$720	$1,472	$174	$820
7-days out-of-country trip to T2 destination (with ground transportation)	$2,630	$394	$559	$1,342	$92	$235
7-days out-of-country trip to T2 destination (with air travel)	$3,260	$394	$559	$1,342	$172	$822

Note: *Double occupancy, price per person*

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.

Destination preference

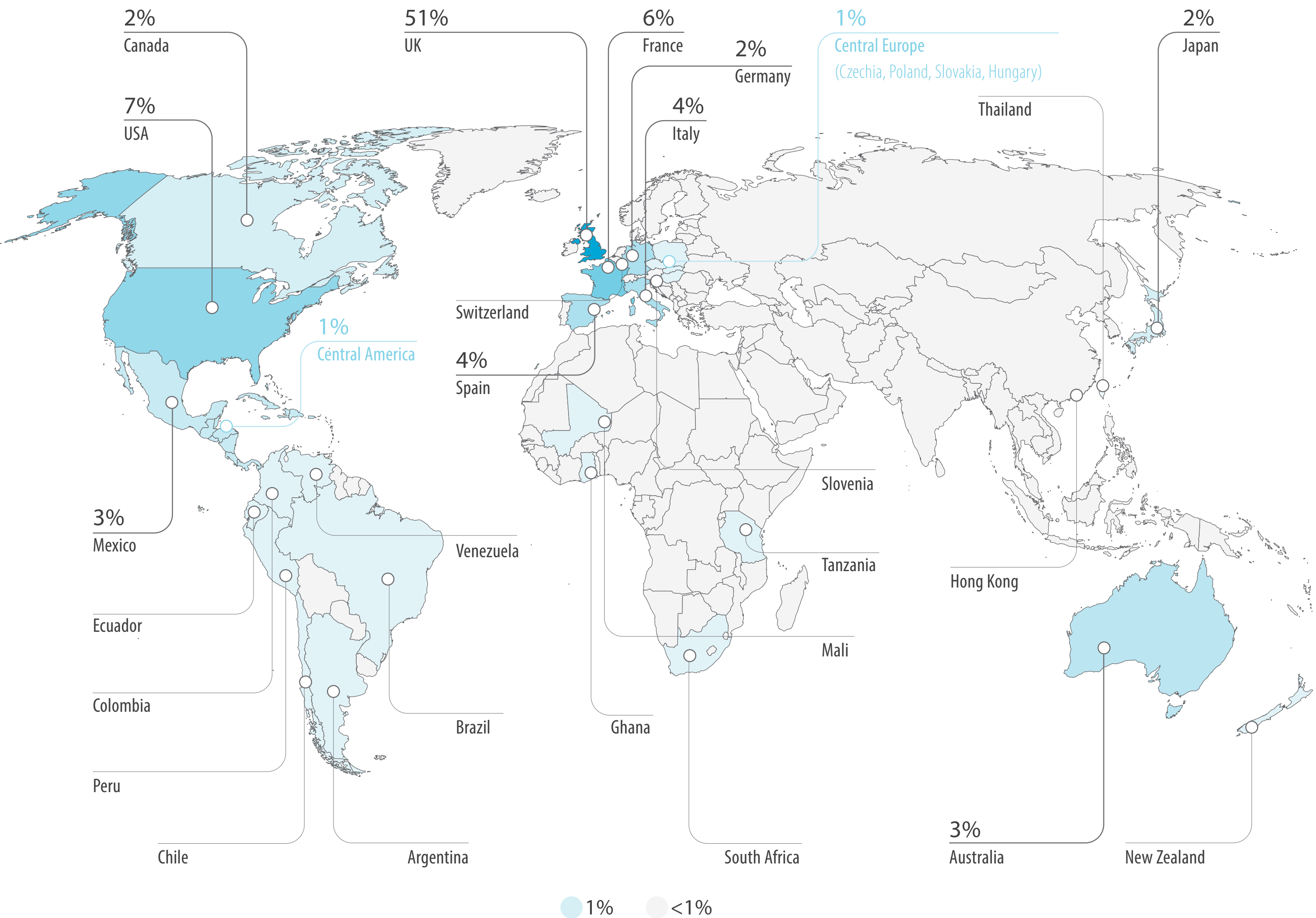
Share of students traveling to selected destinations

SOCIAL MEDIA CONTINUES TO INFLUENCE TRAVEL TRENDS, WITH DESTINATIONS LIKE ICELAND TRENDING ON THESE OUTLETS, PARTICULARLY AMONG YOUNGER TRAVELERS WHO ARE DRAWN TO UNIQUE EXPERIENCES THEY SEE ON DIFFERENT SOCIAL MEDIA PLATFORMS.

Meanwhile, in some markets, political and economic conditions are affecting travel demand. For example, in New Zealand and the UK, inflation and cost-of-living pressures have led to reduced demand for out-of-country tours, while Australia has not seen the same trend.

In 2023, inbound travel to the U.S. was at 12%, whereas in 2024, it declined to 7%. This drop is reflects the large number of U.S. based tour operators who responded to the survey.

Despite these challenges, demand for cultural experiences and international travel remains strong with high demand by North American students for traditional European destinations.



Transportation in student group travel

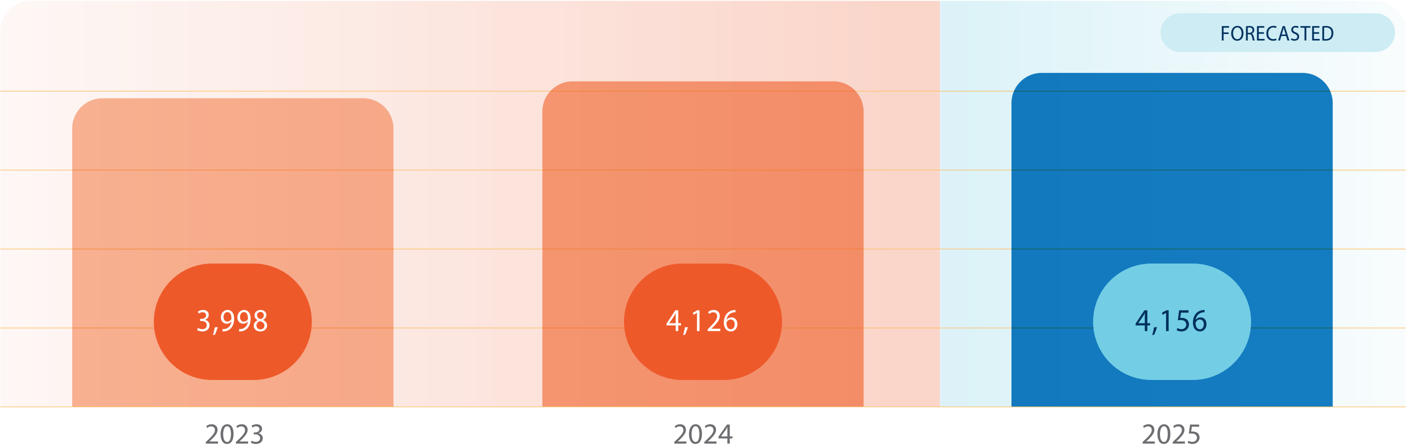
MOTORCOACH TRAVEL REMAINS A KEY TRANSPORTATION OPTION FOR NORTH AMERICAN STUDENT GROUP TRIPS, BUT RISING COSTS HAVE IMPACTED ON AFFORDABILITY AND DEMAND. TOUR OPERATORS REPORTED THAT INCREASED MOTORCOACH TRAVEL COSTS HAD MADE IT DIFFICULT FOR SOME SCHOOLS TO AFFORD MULTI-DAY OR LONG-DISTANCE TRIPS.

As a result, more student groups are considering flights despite the increasing airfare costs, as air travel offers greater flexibility and efficiency for both in -country and out-of-country travel in North America.

Nonetheless, the total number of motorcoach trips is increasing, rising from 3,998 in 2024 to an expected 4,156 in 2026.

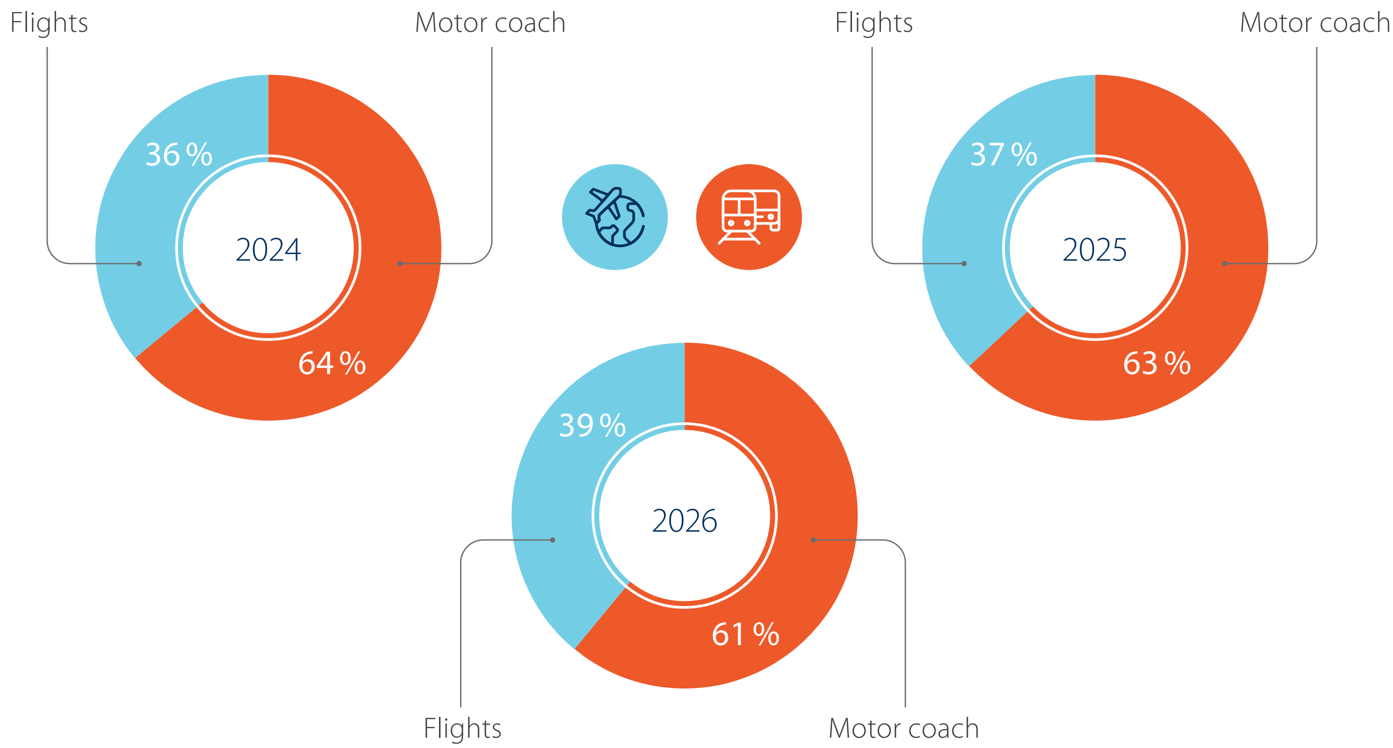
Looking ahead, motorcoach cost will continue to play a role in destination selection, with schools and tour operators carefully evaluating travel distances and considering hybrid travel options—such as combining flights with shorter motorcoach transfers—to balance affordability and efficiency.

Number of groups booked for in-country travel by motor coach



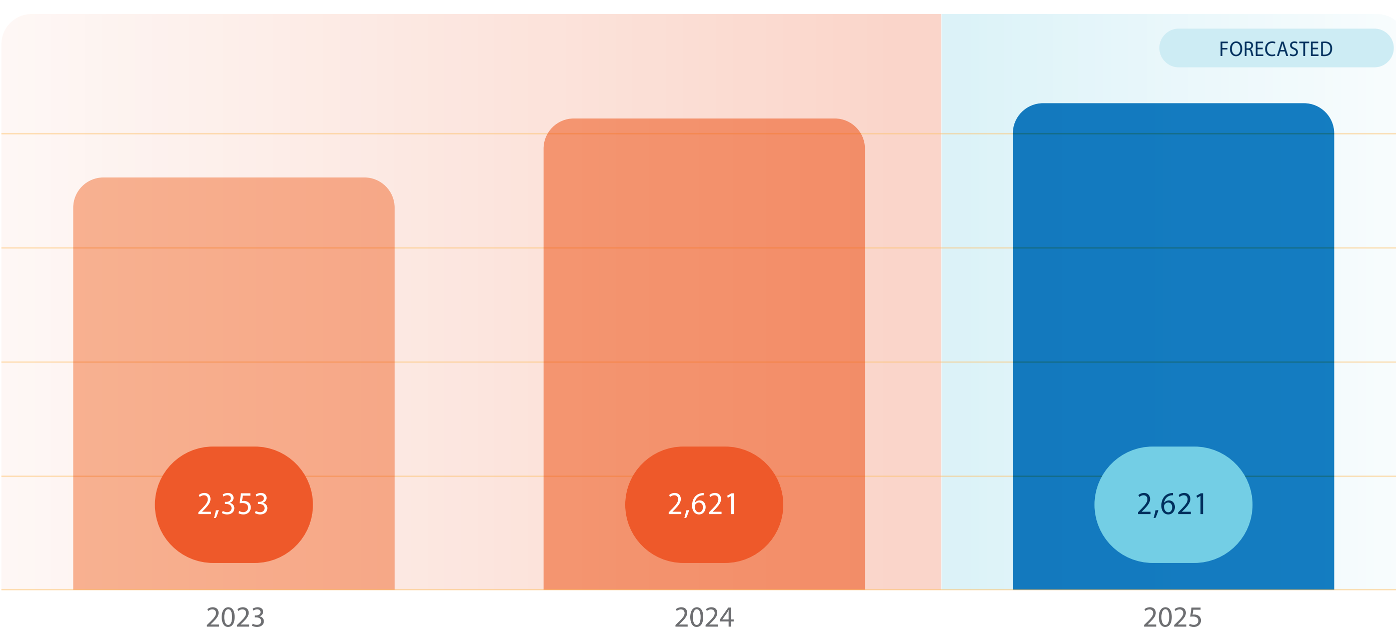
Based on 38 STOs.

Share of trips booked using motor coach vs flights



Based on 36 STOs.

Number of groups booked for out-of-country travel by plane



Based on 36 STOs.

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The Student & Youth Travel Association (SYTA) is the only organization to generate any definitive data on the student group travel market. SYTA is the premier association dedicated to providing life enhancing travel experiences to students and young people, whose 800 members include student group tour operators, travel suppliers, and destinations. In 2016, the association produced the Student & Youth Travel Digest, a qualitative study of the social effects of travel in young people. The global survey respondents included student tour operators, educators and administrators of student travel. SYTA is seeking partners, sponsors and advocates to increase the size and reach of the 2026 Student & Youth Travel Digest. Please contact Carylann Assante, CAE at cassante@syta.org to join this important landmark study.

THANK YOU

SYTA RESEARCH WOULD NOT BE POSSIBLE WITHOUT THE SUPPORT OF ITS VALUED MEMBERS AND PARTNERS.

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