INTERNATIONAL STUDENT & YOUTH TRAVEL INSIGHT

GLOBAL TRENDS, OPERATOR PERSPECTIVES, AND THE FUTURE OF STUDENT TRAVEL

Prepared for the
Student & Youth Travel Association (SYTA)
Research conducted by BONARD

SYTA STUDENT TRAVEL RESEARCH

SYTA STUDENT & YOUTH TRAVEL ASSOCIATION

syta youth foundation
Travel Changes Young Lives for Good

EXECUTIVE SUMMARY

The international student and youth travel sector continues to evolve, building on trends that were already shaping the market prior to the pandemic. Recent findings show that, while demand has recovered, several of these trends have accelerated, and traditional patterns have not fully returned.

The industry is operating in a more structured, selective, and complex environment.

Across regions, student travel remains strong and consistent. The market is stabilizing into a predictable, sustainable growth pattern following an initial surge from pent-up demand. Demand is now characterized by increased participation from specific segments, heightened selectivity among schools and families, and growing confidence in long-haul travel.

Several structural changes are shaping the sector. Key findings show that recent developments have led to a change in destination preferences: **demand is decreasing for traditional markets** such as the United States in some regions, while there is growing interest in Asia, alternative European destinations, and emerging regions such as Africa and South America. These trends are driven by both **cost and accessibility** factors, as well as **evolving expectations** for student travel experiences.

Cost has always been a central factor in decision-making; however, it is now more frequently acting as a go/no-go threshold rather than a factor to optimize. Rising prices affect how often students travel, how long trips last, and where they go. Some schools are reducing travel or changing programs to keep trips affordable. Cost volatility also challenges operators, especially with long planning cycles.

Key findings show that schools and parents now expect even **higher standards of safety, transparency, and accountability.** Decision-making is more structured, involving multiple stakeholders, and requires detailed due diligence. As a result, operators must demonstrate **increased professionalism and communication** to meet these heightened demands.

The purpose of student travel is evolving. Key findings show educational value remains central, but there is now a stronger emphasis on **experience, quality, and relevance**. Programs are expected to deliver academic outcomes and foster personal development, specifically resilience, independence, and global awareness.

Despite these challenges, the outlook for the sector remains positive.

Key findings show demand is resilient, as operators adapt through innovation, diversification, and building stronger partnerships with schools.

Student travel continues to be highly valued, with expectations placed on it higher than ever.

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METHODOLOGY

This report is based on qualitative research conducted by BONARD Education on behalf of the Student & Youth Travel Association (SYTA). Insights were gathered through a series of in-depth interviews with international tour operators and travel providers specializing in student group travel.

PARTICIPANTS

A range of markets and business models:

- outbound operators
- inbound providers
- destination management companies working with school groups across Europe, North America, Asia, and more.

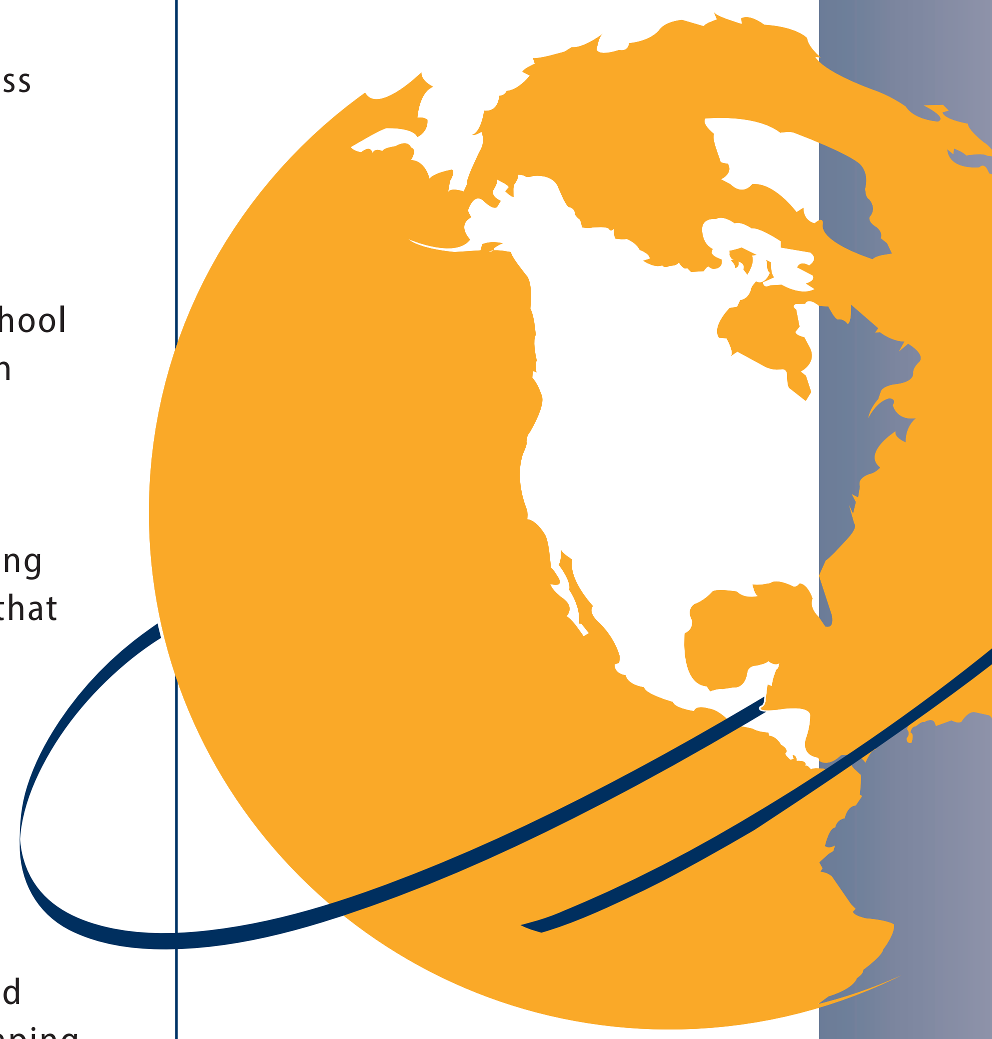
METHOD

Interviews were conducted using a structured discussion guide that covered key topics:

- demand trends
- destination preferences
- operational challenges
- future outlook

OBJECTIVE

Capture industry sentiment and identify emerging patterns shaping the student travel sector.



The research reflects operator perspectives at the time of interviews, which were conducted prior to the most recent escalation of geopolitical tensions in the Middle East. While not quantitative, the findings provide a directional view of current market dynamics and highlight key themes relevant to SYTA members and the broader student travel industry.

INTRODUCTION

Student and youth travel extends education by letting young people experience other cultures, broaden their perspectives, and develop skills beyond the classroom.

For the purpose of this report, student group travel refers to organized travel undertaken by groups of under-18 students, typically under the supervision of teachers or group leaders, and delivered through structured programs that combine educational, cultural, and experiential components. These trips are most often organized in partnership with tour operators or travel providers and are designed to support learning objectives while providing students with real-world experiences beyond the classroom.

In recent years, however, the environment in which student travel operates has changed significantly. The pandemic disrupted global mobility but also accelerated shifts that were already underway. Schools are more cautious, parents are more involved, and operators are working within a more demanding and complex framework.

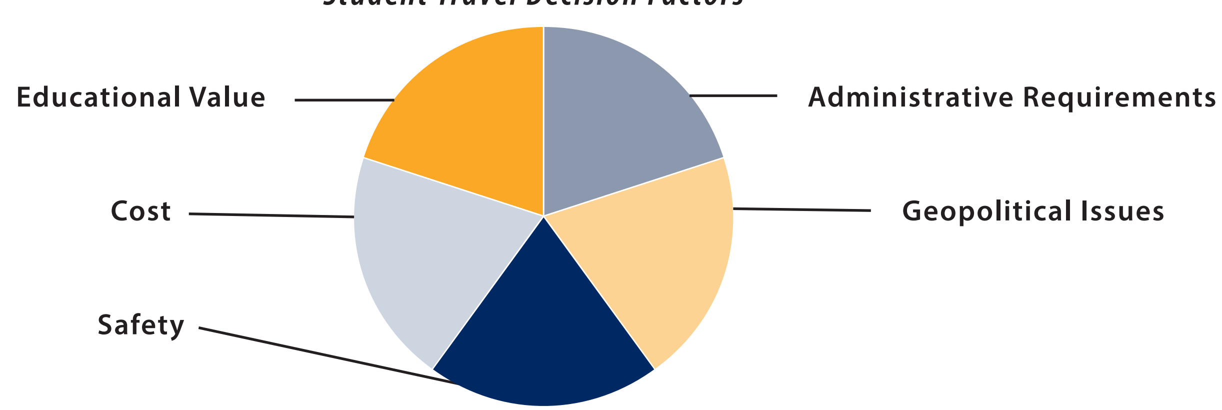
Today, many factors shape student travel decisions. ***Educational value matters, but cost, safety, geopolitical issues, and administrative requirements now weigh equally.***

This complexity makes planning and delivering student travel more challenging and more intentional.

To better understand how the sector is evolving, SYTA commissioned BONARD to gather qualitative insights from international tour operators. These conversations provide a real-time perspective on how the market is changing and how operators are adapting. The interviews were conducted prior to the most recent escalation of tensions in the Middle East, including the conflict involving Iran. While this report does not assess the direct impact of these developments, operators consistently highlighted geopolitical uncertainty as a key factor influencing destination choices and travel planning.

The findings in this report show that the sector is resilient and responsive. Demand is strong, but expectations have changed. Student travel is now more thoughtful, structured, and aligned with educational and developmental goals.

Student Travel Decision Factors

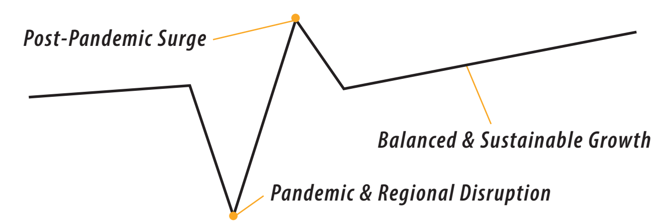


FINDINGS

DEMAND: RECOVERY AND A NEW NORMAL

Operators across all regions describe student travel as a structurally consistent sector, with demand demonstrating stability and resilience over time. After a period of disruption, including the pandemic and regional conflicts, many markets experienced a surge in interest as students and families sought to regain opportunities they had missed. That initial rebound has now transitioned into a more balanced and sustainable pattern of growth.

Student Travel Growth Pattern



Operators report steady year-over-year increases, not rapid expansion. The market is maturing, with stable and predictable demand. Yet, external factors, including geopolitical events, cost changes, visa policies, and safety perceptions, still shape outcomes. One operator summed it up:

"We went through a big surge after Covid-19, then it slowed slightly, and now it's stabilizing again."

Demand is changing. Some operators see greater participation from private or wealthier schools; others say students now travel more often to new destinations rather than repeat trips.

Importantly, operators also highlight a gradual return of confidence among parents and schools regarding long-haul travel. While the immediate post-pandemic period was characterized by a preference for shorter, regional trips, there is now a growing willingness to consider destinations further afield, including Africa and South America, particularly for more experienced or older student groups.

What stands out most is that **demand has not weakened.** Instead, demand is more selective and intentional, now closely aligning with financial concerns and shifting expectations for safety and value.

SHIFTING TRAVEL FLOWS AND DESTINATION PREFERENCES

Changes in destination preferences are among the most visible developments in the current market.

The United States, historically one of the leading destinations for student travel, has seen a reduction in demand across several regions. Operators report fewer bookings, although in many cases programs are being redirected to alternative destinations rather than canceled altogether.

This shift reflects a combination of practical and perceptual factors. Visa processes, political developments, strengthening dollar, and broader concerns about entry requirements have led schools and parents to adopt a more cautious approach. In addition, widespread media coverage and anecdotal stories about border experiences have amplified uncertainty, even among travelers who have not directly experienced them. As one operator explained:

"We're probably about 30% down on U.S. travel compared to where we expected to be."

At the same time, operators say this shift is not necessarily permanent. There is a general expectation that, once geopolitical conditions stabilize and perceptions improve, demand for travel to the United States will likely return. Historically, student travel has shown a strong ability to recover after disruption. Many operators view the current situation as part of a broader cyclical pattern rather than a long-term structural decline.

In the meantime, schools and families are adapting by exploring alternative destinations that are perceived as more accessible, cost-effective, or stable in the current environment. Asia has emerged as one of the most dynamic and strategically important regions for student travel in the current market. Operators consistently report growing demand for destinations such as Japan, China, Singapore, and Vietnam, particularly for programs that combine cultural exposure with academic or skills-based learning.

This growth is supported by several reinforcing factors. Many Asian destinations offer strong infrastructure, high safety standards, and relatively efficient visa processes, which reduces uncertainty for schools and parents. At the same time, improved flight connectivity and competitive pricing have made the region more accessible for both short- and long-haul programs.

Asia's educational positioning has also become increasingly relevant. Countries such as Japan and China are strongly associated with innovation, technology, and future-oriented industries, making them particularly attractive for STEAM-focused travel. Operators report rising interest in programs that include visits to universities, science centers, and technology hubs, alongside cultural immersion, and language learning. China, in particular, is gaining renewed attention as travel conditions ease and international engagement expands.

Beyond major urban centers, there is also a shift toward more immersive and less crowded experiences. Schools are increasingly seeking destinations that allow for deeper cultural engagement while avoiding congestion, reflecting a broader move toward experience-driven travel.

Within Europe, demand remains strong, but travel patterns are changing in response to both cost pressures and overtourism. Major cities continue to attract interest, but rising prices and overcrowding are prompting schools to reconsider traditional itineraries. Operators are responding by designing more flexible programs that include secondary cities, regional destinations, and multi-country routes.

This approach allows schools to balance educational value with affordability while also offering a more diverse and less congested experience. In many cases, itineraries now combine well-known cultural landmarks with lesser-known destinations, creating a more curated, intentional travel experience.

At the same time, destinations in Africa and South America are playing an increasingly important role, particularly in experiential and purpose-driven travel. These regions are valued not only for their uniqueness but also for the experiences they offer.

Shifting Destination Decisions

Destination	Trend
United States	↓↓↓
Japan	↑↑↑
China	↑↑
Singapore	↑↑
Vietnam	↑↑
Africa	↑
South America	↑
Europe	→

Programs often incorporate community engagement, environmental initiatives, and cultural immersion, allowing students to interact directly with local environments and communities. These experiences are frequently combined with outdoor and adventure-based elements, creating programs that are both educational and engaging.

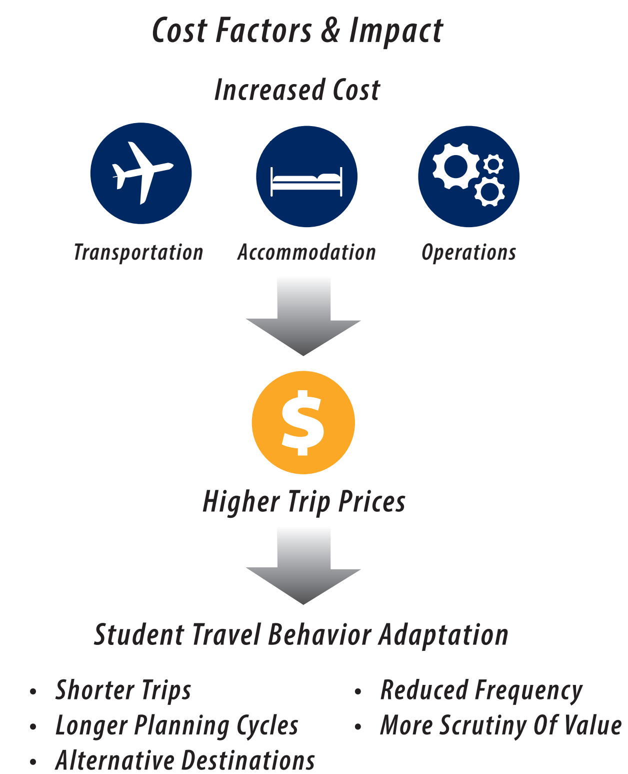
What distinguishes these destinations is their ability to deliver depth of experience. As expectations around student travel continue to evolve, there is a growing demand for programs that ***go beyond traditional sightseeing and provide meaningful, real-world engagement***.

COST PRESSURES AND THEIR IMPACT

Cost has always been a key factor in student travel, but it is now playing a more decisive role in shaping outcomes. Operators highlight increases in transportation, accommodation, and overall operational expenses, all of which have made travel more expensive for schools and families. Airfare, in particular, remains one of the most significant cost drivers, while accommodation shortages in high-demand destinations are further pushing prices upward.

In response, travel behavior changes in noticeable ways. Schools are becoming more selective in how they allocate budgets, and families are placing greater emphasis on value. This has led to a range of adjustments, including shorter trip durations, changes in destination choices, and more careful evaluation of program components.

In some cases, schools that previously organized annual international trips are now shifting to a two-year cycle. This allows families more time to plan financially and helps secure sufficient participation levels, particularly as costs continue to rise. At the same time, some schools are limiting the number of trips offered each year to avoid competition between programs.
Cost pressures are also influencing destination selection. High-cost destinations are increasingly being replaced by alternatives that offer comparable educational and cultural experiences at lower prices. This substitution is not necessarily reducing demand, but it is reshaping travel flows and encouraging greater diversification of destinations.



For operators, cost volatility presents an additional layer of complexity. Student travel typically involves long planning cycles, often requiring quotes and program design to be finalized many months in advance. Fluctuations in exchange rates, supplier pricing, and availability can therefore directly impact both profitability and the ability to provide accurate pricing to schools.

As a result, cost is no longer a background consideration. It has become one of the primary factors shaping how student travel programs are structured, priced, and delivered, influencing decisions at every stage of the planning process.

A MORE DEMANDING ENVIRONMENT

Expectations from schools and parents have increased significantly in recent years, creating a more demanding and structured environment for student travel providers.

Safety is now at the center of travel planning. Schools require detailed information on every aspect of a trip, including accommodation and transportation, emergency procedures, staff qualifications, and on-the-ground support. In many cases, this includes formal risk assessments, documentation of safety protocols, and clear contingency planning. What was once handled informally is now highly documented and often standardized.

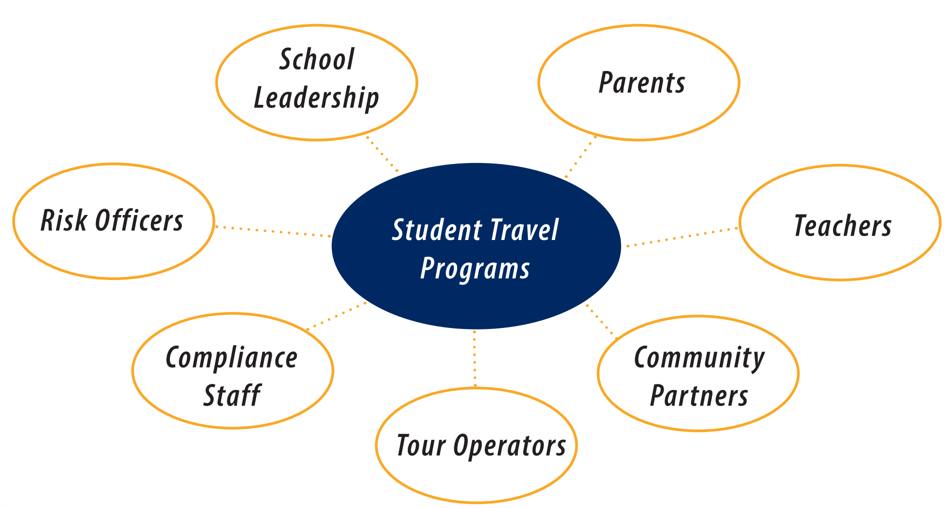
Parents are also more involved than in the past. They are asking more detailed questions, seeking greater transparency, and expecting a higher level of communication before committing to a trip. This shift is partly driven by increased access to information, including social media and online sources, which can amplify both awareness and concern around potential risks. One operator described this shift in simple terms: "You used to just send students off. Now you have to answer fifty questions before they even get on the plane."

This heightened level of scrutiny has also extended to the relationship between schools and travel providers. Trust has become a critical factor in decision-making. Schools are more careful when selecting partners and are increasingly conducting thorough checks on financial stability, reputation, and operational standards. In some cases, this includes formal procurement processes or internal reviews involving risk management teams.

In addition, internal structures within schools are evolving. Some institutions now involve dedicated staff responsible for risk assessment or compliance in the planning and approval of travel programs. This adds another layer of oversight and extends decision-making timelines.

While these developments increase the complexity of organizing student travel, they also reflect a broader shift toward accountability and professionalism across the sector. Higher expectations are raising standards and encouraging operators to strengthen their processes, improve transparency, and build more structured and reliable partnerships with schools and families.

Factors Affecting Student Travel Program Decision Making



THE CHANGING NATURE OF STUDENT TRAVEL

Expectations around what student travel should deliver are also evolving in meaningful ways.

There is a clear shift away from passive sightseeing toward more active and engaging experiences. While traditional visits to cultural landmarks remain an important part of many programs, they are increasingly complemented or replaced by activities that allow students to interact more directly with their surroundings. This includes cultural exchange, hands-on workshops, project-based learning, and outdoor experiences that encourage participation rather than observation.

Schools and educators have long viewed student travel as part of the broader learning experience. However, there is now a noticeably stronger emphasis on the quality, structure, and relevance of these experiences. Travel is no longer treated as a complementary activity but, more explicitly, as an extension of the learning process.

As a result, there is an increasing demand for programs that can clearly demonstrate their educational value. This includes stronger alignment with curriculum objectives, whether through subject-specific content, skills development, or broader competencies such as critical thinking and global awareness.

At the same time, travel is increasingly positioned as a tool for personal development. Operators frequently highlight the role of travel in building resilience, independence, and confidence, particularly as young people navigate increasing social and technological pressures. Experiences that challenge students, encourage problem-solving, and require them to step outside their usual environment are considered particularly valuable.

This shift is also reflected in the growing interest in programs that incorporate elements such as community engagement, environmental awareness, and cultural immersion. These components allow students to gain a deeper understanding of the places they visit while also developing a sense of responsibility and global awareness. For many schools, this aligns closely with broader educational priorities, including character development and social responsibility.

While not all programs follow this model, the overall direction is clear. Student travel is becoming more intentional in its design, with a stronger focus on delivering meaningful experiences that support both educational and personal development over the long term.

Student Travel Behavior Shifts

Traditional destinations	**Diversified destinations**
Sightseeing focus	**Experiential learning**
Simpler approvals	**Multi-layer approvals**
Teacher-driven	**Multi-stakeholder decisions**
Cost optimization	**Cost threshold**
Basic safety expectations	**Extensive due diligence**

OPERATIONAL COMPLEXITY AND INDUSTRY RESPONSE

As expectations increase, so does the complexity of operating student travel programs.

Operators today must navigate a range of interconnected challenges. Rising costs continue to affect every stage of program delivery, while limited availability in high-demand destinations makes planning more difficult, particularly during peak travel periods. At the same time, administrative requirements have become more detailed and time-consuming. What was once a relatively straightforward process now often involves extensive documentation, including risk assessments, insurance verification, compliance checks, and alignment with school policies.

Decision-making processes within schools have also become longer and more structured. In many cases, approval for a single trip may involve multiple stakeholders, including teachers, school leadership, risk, or compliance officers, and, in some instances, school boards or external authorities. This can significantly extend timelines, particularly for international or long-haul programs.

For example, operators report that even after initial interest from a teacher, programs may take months to move through internal approval processes. In some cases, trips are delayed or canceled not because of a lack of demand but because of administrative complexity or competing priorities within schools. Similarly, increased scrutiny from parents can slow confirmation timelines, as additional questions and information requests must be addressed before commitments are made.

Despite these challenges, operators are actively adapting their business models and operations. Many are investing in stronger internal systems, including standardized safety documentation, pre-prepared risk assessment templates, and more detailed program briefings. These tools help streamline communication with schools and ensure that all required information can be provided efficiently and consistently.

There is also a growing emphasis on transparency and communication. Operators are spending more time engaging with schools and parents, providing clear explanations of safety procedures, program structure, and contingency planning. In some cases, this includes pre-departure meetings, detailed information packs, and ongoing communication channels throughout the trip.

Tour Operator Adaptations

Challenge	Response
Rising costs	Diversified programs
Safety expectations	Standardized documentation
Parent scrutiny	More communication
Longer approvals	Better planning systems
Geopolitical uncertainty	Flexible itineraries

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At the same time, long-term partnerships are becoming increasingly important. Rather than operating on a transactional basis, many providers are focusing on building sustained relationships with schools, allowing for greater trust, smoother planning processes, and repeat business over time.

In many ways, these developments point to a broader shift toward professionalization across the sector. Higher expectations are driving improvements in how programs are designed, communicated, and delivered. While this increases the operational burden, it also contributes to a more structured, reliable, and ultimately more resilient industry.

OUTLOOK FOR THE SECTOR

Looking ahead, the outlook for student travel remains positive, although the operating environment is likely to remain complex and, at times, unpredictable.

Destination diversification is expected to continue as schools explore a wider range of options and seek greater flexibility in how programs are designed. Rather than relying on a small number of traditional destinations, operators anticipate further expansion into both emerging markets and alternative locations within established regions. This will allow schools to better balance educational objectives, cost considerations, and risk management.

Cost pressures are likely to remain a defining factor in the years ahead. While demand for student travel remains strong, affordability will continue to influence how programs are structured. This may result in ongoing adjustments to trip duration, destination selection, and the overall design of travel experiences. Schools are expected to continue seeking programs that deliver clear value, both in terms of educational outcomes and overall experience.

Safety and compliance will remain central to decision-making. As expectations from schools and parents continue to rise, operators will need to maintain high standards and provide

clear, consistent communication around safety procedures and risk management. This is likely to further reinforce the importance of professionalism and transparency across the sector.

Geopolitical developments will also continue to play an important role, particularly in shaping perceptions of destinations. Even when conditions on the ground remain stable, broader political narratives and media coverage can influence decision-making among schools and parents. As a result, operators will need to remain flexible and responsive, adapting programs as needed to reflect changing perceptions and circumstances.

At the same time, a number of opportunities are emerging. There is growing interest in programs that offer more than traditional sightseeing, particularly those that incorporate experiential learning, cultural immersion, and purpose-driven activities. This includes initiatives focused on environmental sustainability, community engagement, and leadership development, as well as specialized programs in STEAM, language learning, and global citizenship.

These developments suggest that while the sector is becoming more complex, it is also becoming more dynamic. Operators that can combine strong operational foundations with innovative program design will be well-positioned to respond to changing expectations and continue growing in the years ahead.

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CONCLUSION

International student travel is undergoing a period of meaningful and lasting change.

The sector remains fundamentally strong. Demand has proven resilient amid disruption, and young people's desire to experience the world continues to drive participation. At the same time, the conditions under which student travel operates have become more complex, requiring greater adaptability from all stakeholders.

What emerges from this research is a clearer picture of a maturing sector. Decisions around student travel are more deliberate, expectations are higher, and programs are more carefully designed. Schools and parents are placing greater emphasis on safety, value, and meaningful outcomes, while operators are responding by strengthening their processes, improving transparency, and refining their offerings.

Destination choices are becoming more diverse, reflecting both external constraints and new opportunities. Cost considerations are reshaping how travel is structured, while geopolitical developments continue to influence perception and planning. At the same time, the growing focus on experiential learning and personal development is redefining what student travel is expected to deliver.

These changes present challenges, but they also reinforce the long-term value of student travel. As the sector continues to evolve, it is becoming more aligned with broader educational goals and more responsive to the needs of students, schools, and families.

Ultimately, student travel remains a powerful tool for learning and development. In a world that is increasingly interconnected yet uncertain, the ability for young people to engage directly with different cultures, environments, and perspectives is more important than ever.

The industry is not simply recovering. It is adapting, strengthening, and positioning itself for the next phase of growth.

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KEY FINDINGS

Demand is resilient, as operators adapt through innovation, diversification, and building stronger partnerships with schools.

Student travel continues to be highly valued, with expectations placed on it higher than ever.

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