Student Travel

BUSINESS BAROMETER

The Voice of Student & Youth Travel®

ANNUAL REPORT 2019

BONARD

Introduction

The Student Travel Business Barometer is the latest initiative developed by the Student and Youth Travel Association (SYTA) and BONARD. It has brought much-needed insight into contemporary global student and youth travel, backed by consistent and relevant market intelligence. In line with its determination to represent tour operators and agencies that create products for young people, and to support the sector by providing advocacy, SYTA contracted BONARD to conduct this quarterly research on student group travel among SYTA members and international tour operators and agencies.

This annualized report summarizes the results of the year-long initiative and outlines an overall picture of the student and youth travel market in 2019.

The research mapped student group travel patterns in the following areas:

- Three main key performance indicators: number of students traveling, average trip duration, and average group size
- Preferred trip types in correlation to seasonality
- Popularity/availability of 11 selected destinations for youth travel across the world
- Specific aspects of the global travel industry (safety, technology, and sustainability)
- Year-on-year business performance comparisons
- Stakeholders' anticipation of developments over the upcoming seasons

The research covers the following mobility types:

- Domestic travel, which refers to any trip conducted within the students' own country;
- International travel, which refers to any trip which includes traveling from one country to another; and
- Global aspects, under which different topics resonating among tour operators and agencies are discussed each quarter.

Research was conducted on a quarterly basis, with the exception of Q3 and Q4, for which a merged survey was released after carefully considering feedback from respondents. Due to the turmoil caused by the Covid-19 outbreak, data collection for the second half of 2019 had to be extended until 20 May, 2020.

For the purpose of this project, student group travel was defined as student tours composed of at least two people aged 10-18, traveling out of their day-to-day environment on the same dates and following the same itinerary, usually accompanied by a group leader.

2019 FACT

THIS REPORT BRINGS THE MUCH-NEEDED INSIGHT *INTO CONTEMPORARY GLOBAL STUDENT AND YOUTH TRAVEL, BACKED BY CONSISTENT AND RELEVANT MARKET INTELLIGENCE.*

Methodology

The survey builds on the primary research method. Data were collected through an online quantitative survey distributed to SYTA members and pre-selected international tour operators and agencies from 37 countries specializing in products for students and youth travelers.

English, German, and Chinese versions of the questionnaire were distributed.

Note: Rounding accounts for any percentages not exactly adding up to 100%.

About Us

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. It is "the Voice of Student and Youth Travel ®".

If you would like to learn more about SYTA, its activities, and its advocacy for safe and professional group student travel, or get more information about membership, please visit *www.syta.org*.

For news and important information on student and youth travel follow SYTA's

BONARD is an independent market research provider with 12 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.

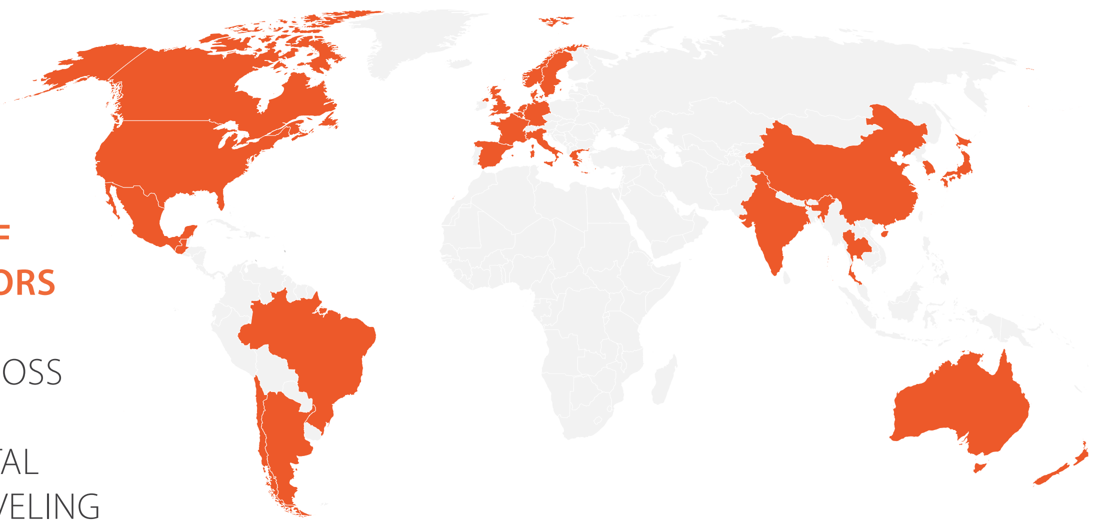
To find out more about BONARD, please visit *www.bonard.com* or connect with us on

For more information about the Barometer, please contact us at *barometer@bonard.com*.

Respondent Profile

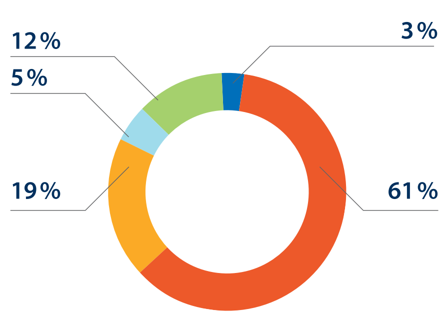
Respondents' country of origin

IN 2019, THE BAROMETER RECEIVED **203 RESPONSES FROM A UNIQUE POOL OF 149 TOUR OPERATORS AND AGENCIES IN 26 COUNTRIES** ACROSS THE GLOBE. THESE REPRESENTED A TOTAL OF 1.8 MILLION TRAVELING STUDENTS.



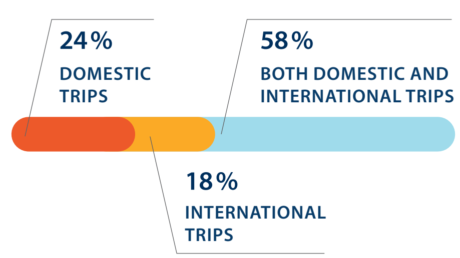
Respondent typology

- **Student Tour Operator**
  Tour operator specializing in organizing tours for students
- **Tour Operator**
  Tour operator also organizing tours for students
- **Travel Agency**
  Agency offering mostly travel products for young people
- **Education Agency**
  Agency offering mostly international education programs



Respondent	Percent	Count
Student Tour Operator	61 %	91
Tour Operator	19 %	28
Travel Agency	5 %	8
Education Agency	12 %	18
Other	3 %	4
Total number of unique respondents	100 %	149

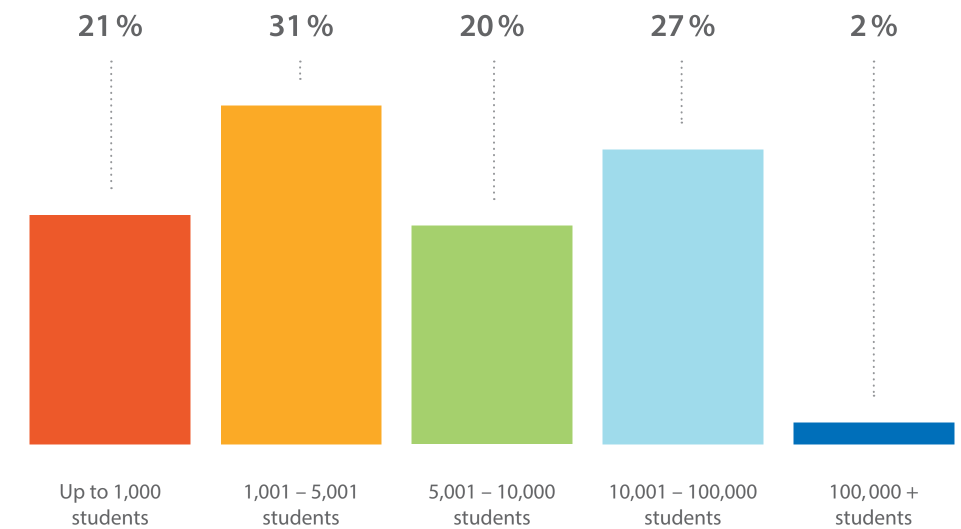
Type of travel



- **Domestic travel** refers to any trip conducted within the students' own country.
- **International travel** refers to any trip which includes traveling from one country to another.

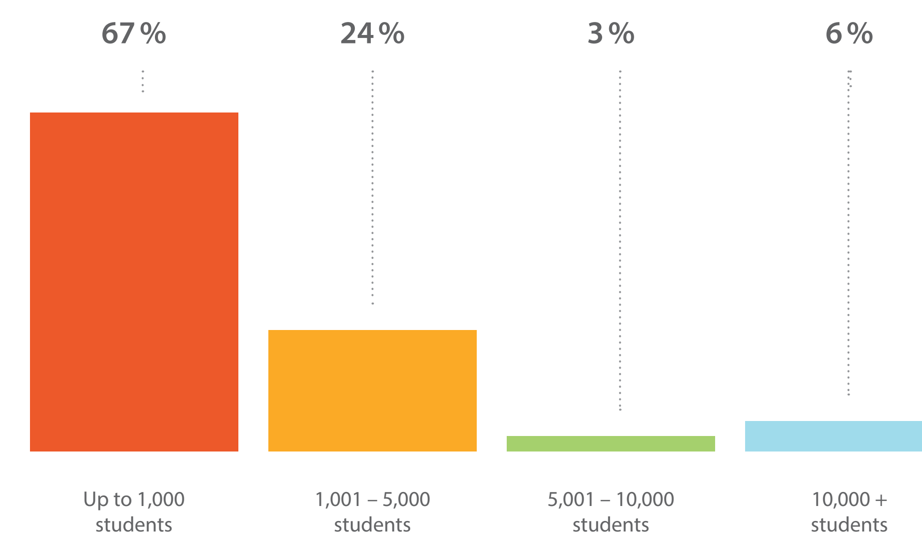
Domestic sending power of student travel operators and agencies in 2018

According to data provided by respondents, tour operators and agencies sending up to 10,000 students per year on domestic trips constituted two thirds of the market, with a 72 % share. Twenty-seven percent of survey respondents moved between 10,000 and 100,000 students per year, and 2 % catered for more than 100,000 students a year.



International sending power of student travel operators and agencies in 2018

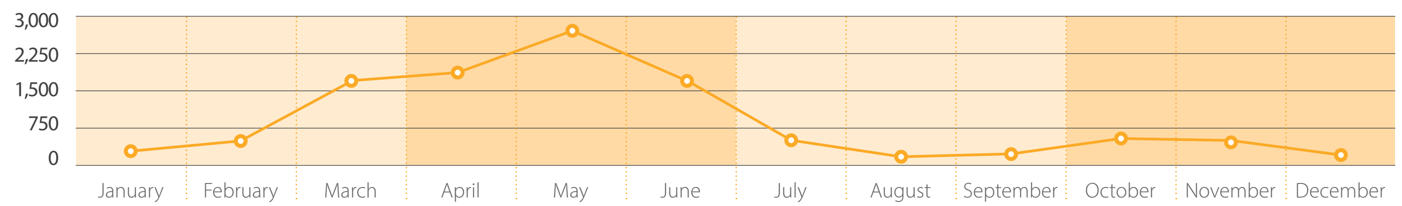
As regards international travel, smaller tour operators and agencies sending abroad up to 1,000 students yearly represent two thirds (67 %) of the market. The remaining share is divided between mid-size companies (27 %) moving between 1,000 and 10,000 students and big tour operators (3 %) sending 10,000+ students per year.



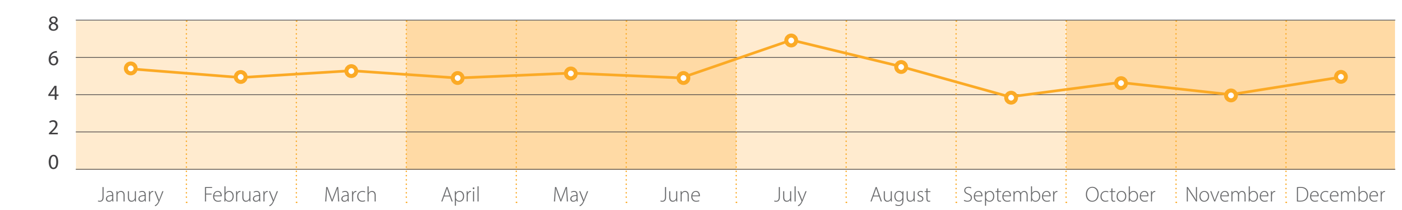
Key Performance Indicators

Domestic travel

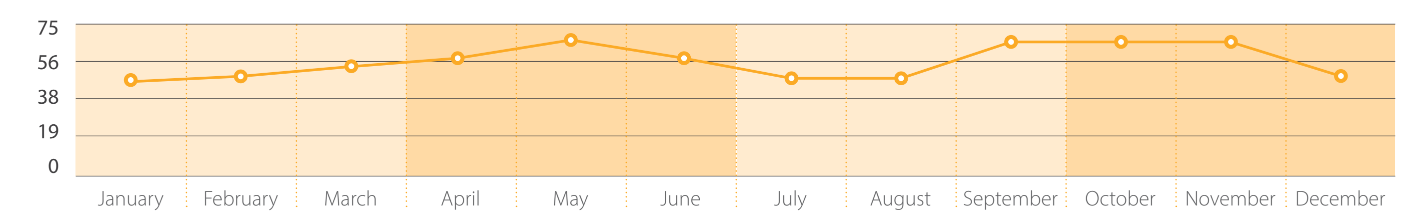
AVERAGE NUMBER OF STUDENTS TRAVELING



AVERAGE TRIP DURATION (DAYS)



AVERAGE NUMBER OF STUDENTS PER GROUP



For the first time since the SYTA Digest, this research tracked monthly development in three key performance indicators. The results quantify the seasonality of the industry and reveal that spring and early summer are the most travel-heavy periods for both domestic and international student group travel.

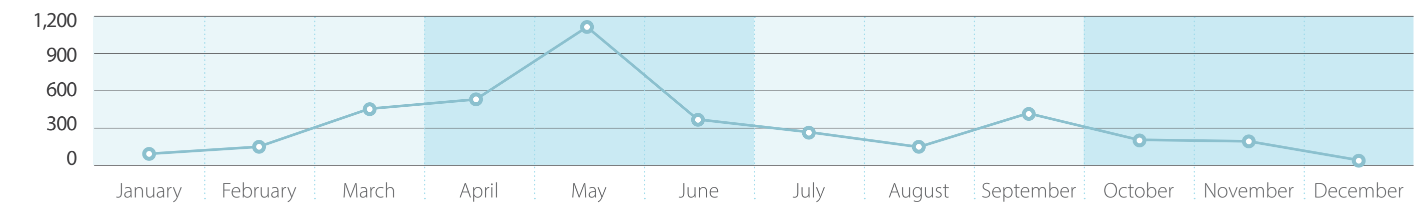
Domestic Travel
May significantly outperformed other months in terms of student volume, reaching an average of just below 2,800 traveling students per tour operator. April, March, and June followed, accounting for 1,759, 1,662, and 1,584 students on average, respectively. August, September, and December turned out to be the months with the fewest students on the move, reaching averages of only 101, 137, and 207, respectively.

Trip duration remained fairly stable in the first half of 2019, with the average oscillating between 5.0 and 5.7 days. The average trip length peaked in July, when students spent an average of 7 days per trip. Conversely, in September and October students were embarking on the shortest trips, of 3.9 and 4 days, respectively.

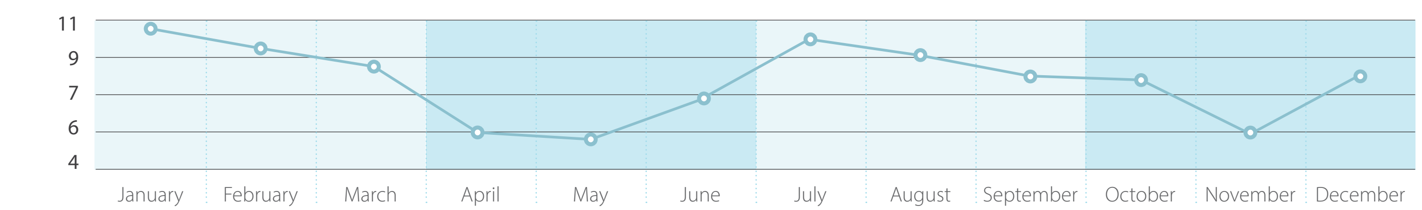
Compared to the previous two indicators, average group size did not record any significant shifts throughout the year, remaining within the range of 48 to 65 students per group. The highest number of students traveling in May also translated into the biggest groups for this month.

International travel

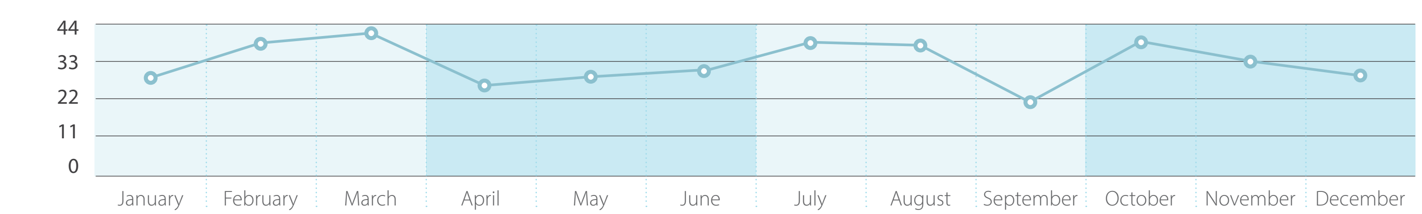
AVERAGE NUMBER OF STUDENTS TRAVELING



AVERAGE TRIP DURATION (DAYS)



AVERAGE NUMBER OF STUDENTS PER GROUP



International Travel
As regards the average number of students traveling, international travel follows a similar pattern as domestic travel. March, April, and May represent the high season for tour operators. Going into the summer period, the number of traveling students decreases before picking up again slightly in September. Q1 and Q4 otherwise represent a hibernation season for international student group travel. For December, January, and February, the number of students travelling per tour operator averaged 51, 89, and 139.

Furthermore, the average length of international trips fluctuates to a greater extent than is seen in the case of domestic travel. Students enjoy a bigger window of opportunity to travel in January and July, as a result of which they spent 10.9 and 10.3 days abroad, respectively. This compares to 5.2 days in May.

The smallest groups embarked on international adventures in September, exhibiting an average of 20 students, while the biggest groups were put together in February (39), March (43), and October (37).

Change in the Key Performance Indicators 2019 vs. 2018

Domestic travel

	AVERAGE NUMBER OF STUDENTS TRAVELING	AVERAGE TRIP DURATION	AVERAGE GROUP SIZE
Q1	54% / 31% / 14%	24% / 73% / 3%	31% / 57% / 11%
Q2	65% / 14% / 21%	14% / 79% / 6%	35% / 42% / 23%
Q3	50% / 48% / 2%	11% / 89% / 0%	26% / 72% / 2%
Q4	60% / 30% / 10%	20% / 74% / 6%	31% / 60% / 9%

Increase · No change · Decrease

According to the responding organizations, the student group travel industry was in a healthy condition in 2019. Comparing business volume to 2018, most of the tour operators and agencies noted increases in the number of students traveling in all four quarters.

More than half of STOs reported growth in Q1 2019. However, at 65%, the biggest percentage of tour operators saw their bookings increase in Q2. At the same time, 21% of respondents noted a higher decrease in student volume in Q2 than in any other quarter. Q3 represented the most stable quarter in terms of number of students traveling, while 60% of businesses saw growth in Q4.

Compared to 2018, the average length of trips remained the same for more than 70% of respondents. Nonetheless, 24% (Q1) and 20% (Q4) of tour operators reported sending groups out for more days than in 2018.

Average group sizes experienced more notable shifts than average trip duration. In all quarters one third of respondents reported bigger groups than in 2018. The majority of tour operators in Q1, Q3, and Q4 did not register a change in group size; however, 11% and 23% of respondents noted sending smaller student groups in Q1 and Q2 of 2019.

International travel

	AVERAGE NUMBER OF STUDENTS TRAVELING	AVERAGE TRIP DURATION	AVERAGE GROUP SIZE
Q1	46% / 36% / 18%	11% / 79% / 10%	23% / 64% / 13%
Q2	52% / 17% / 30%	11% / 75% / 15%	26% / 56% / 19%
Q3	56% / 41% / 4%	4% / 93% / 4%	30% / 67% / 4%
Q4	40% / 56% / 4%	20% / 80% / 0%	19% / 77% / 4%

Increase · No change · Decrease

Similarly to domestic travel, the volume of students traveling abroad rose in comparison with the previous year. In the second and third quarter more than half of the respondents (52% and 56%) noted an increase in number of students traveling in comparison with 2018. The last quarter saw less of a boom; however, 40% recorded an increase in the volume of students and 56% reported no change in this indicator.

Conversely, numbers faltered in the first and second quarter as 18% and 30% of tour operators, respectively, reported fewer students traveling.

The other two indicators, average trip duration and average group size, are less prone to changes than volume of students, as demonstrated by the research. Most of the respondents did not note any major changes in trip duration or group size when compared to 2018.

The number of students per group remained the same as in the previous year for the majority of tour operators and agencies. Nonetheless, in all four quarters, between 19% and 30% of respondents reported an increase in average group size in comparison with 2018. On the other hand, 13% of respondents in Q1 and 19% in Q2 noted a decrease in number of students per group.

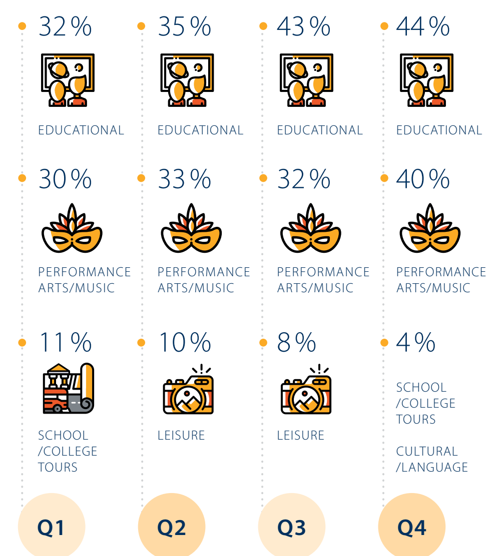
Preferred Programs

Domestic travel

Trips with educational components hold sway and constitute the majority of all trips in domestic travel, closely followed by performance arts/music programs. This result is in line with the findings that a trip must have an educational background in order to be approved by a school board and parents.

Program	Q1	Q2	Q3	Q4
Educational	32%	35%	43%	44%
Performance Arts/Music	30%	33%	32%	40%
School/College tours	11%	3%	4%	4%
Cultural/Language	9%	7%	5%	4%
Leisure	7%	10%	8%	3%
Adventure/Discovery	4%	4%	4%	3%
Community service/Volunteering	4%	3%	2%	1%
Sports	3%	3%	1%	1%
Other	0%	3%	2%	1%

Top 3 domestic travel programs

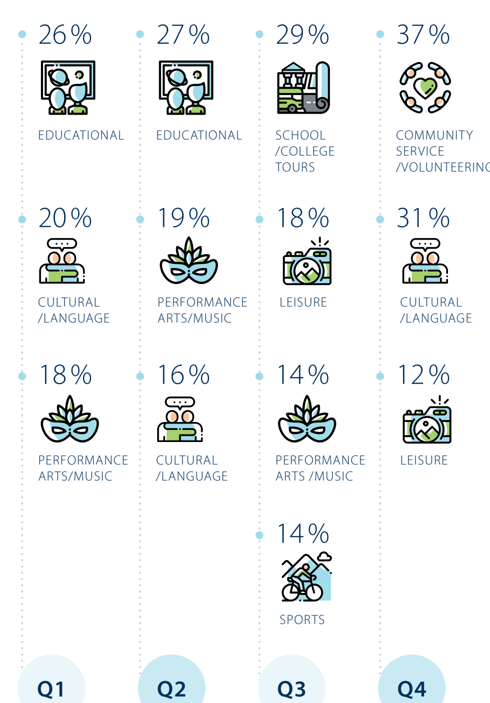


International travel

Programs preferred by international student group travel turned out to be more diversified than those within domestic travel. In the first two quarters, educational programs ranked first, with 26% and 27% of respondents noting these were the most popular. However, in the second half of the year, educational trips lost their lead to school/college tours (29% of all trips in Q3) and community/volunteering programs (37% in Q4). As expected for international trips, cultural/language programs were students' second most popular choice in Q1 and Q4, and the third most popular in Q2. However, in the summer months, leisure, sports, and performance arts/music programs enjoyed greater popularity.

Program	Q1	Q2	Q3	Q4
Educational	26%	27%	3%	9%
Cultural/Language	20%	16%	11%	31%
Performance Arts/Music	18%	19%	14%	2%
School/College tours	10%	9%	29%	1%
Leisure	9%	11%	18%	12%
Adventure/Discovery	6%	4%	7%	0%
Community service/Volunteering	5%	5%	1%	37%
Other	3%	7%	3%	0%
Sports	3%	1%	14%	7%

Top 3 international travel programs



Destination Performance

The Barometer measured 11 selected countries across the globe. Tour operators and agencies were asked to evaluate quarter-to-quarter performance of these destinations by choosing one of the following options:

- More popular
- No change
- Less popular
- We do not offer this destination

For the purpose of outlining the overall performance of these destinations throughout 2019, each 'more popular' and 'less popular' response was assigned 1 score point. Points for each type of response were summed up and subtracted from each other. Final values displayed in the graph below illustrate the rise and fall of students' interest in traveling to these destinations. The results indicate preferences and do not represent a headcount measurement.

Changes in quarterly performance

% of tour operators which did not feature the 11 selected destinations in their portfolio:

Note: The percentages are influenced by a higher number of responses from tour operators based in the USA.

- Australia 46%
- Canada 16%
- China 47%
- Costa Rica 46%
- France 19%
- Germany 27%
- Ireland 25%
- Italy 23%
- Spain 16%
- USA 14%
- UK 16%

Closing remarks

Conclusions

In comparison to other tourism or other international student mobility-related sectors, student group travel is under-documented and lacks a data-driven foundation, regularly updated to reflect current business developments and the needs of stakeholders.

The Student Travel Business Barometer was a dedicated initiative that brought together SYTA members and international student tour operators and agencies to document the state and performance of global student group travel. Research sought to identify student group travel patterns in domestic and international travel, tied in with seasonality, and present stakeholders with a foundation for future benchmarks.

The survey shows that student tour operators and agencies sending students on both domestic and international trips account for 58 % of the market, while those with domestic-only and international-only portfolios account for 24 % and 18 %, respectively.

Results point to spring as the most travel-heavy season and to May as the month with the highest average number of students traveling per student tour operator. These findings apply to both domestic and international travel. However, the average number of students traveling in May is slightly under 1,200 for international travel, while for domestic travel this number doubles. The higher number of students traveling domestically is also reflected in the ratio of tour operators, based on their sending power. Tour operators moving up to 5,000 students per year domestically constitute 52 % of the market in comparison to the 91 % share such operators have in international travel.

In year-over-year comparison for both types of travel, the majority of the tour operators and agencies reported an increase in the number of students traveling in comparison with 2018. This indicated that the industry was in a healthy condition prior to the Covid-19 outbreak.

Domestic trips with an educational and performance arts/music background were the top two most popular types, with other programs trailing significantly. Programs in international travel varied more as the top two spots are shared by educational, cultural/language, performance arts/music, leisure, and school tours.

Closing remarks

This research represents the latest snapshot of the global market prior to the Covid-19 outbreak. As such, the survey recorded the state of the student group travel sector before the disruption caused by the global pandemic. Many tour operators had set high expectations and had it not been for the coronavirus outbreak, which threw the travel industry into survival mode, 2020 would likely have outperformed 2019.

Evidence-based data and consumer insight are a cornerstone for maneuvering through the complexities of the current situation. Market feedback that swiftly reflects changes in consumers' behavior and expectations, empowers decision-making and helps stakeholders to adapt to new realities with innovative attitude and effective solutions is vital. SYTA and BONARD will continue bringing invaluable data and market insights to maintain a source of accurate business intelligence.

Thank you very much for being there with us.

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