



SYTA

The **VOICE** of Student & Youth Travel®

Agenda

Welcome and Introductions

SYTA and SYTA Youth Foundation
Research Agenda



SYTA

The **VOICE** of Student & Youth Travel®

Who we are

- North America's leading membership association for businesses that serve the student and youth travel market
- 800 members: tour operators and travel agencies, as well as hotels, attractions, restaurants, DMOs, etc.
- Annually, SYTA tour operator members "move" more than 3 million kids and account for more than \$1.5 billion in travel expenditures
- A strong "voice" to the education and youth group leader audiences: Education, Music & Performance, *Teach & Travel*, etc.



SYTA

The **VOICE** of Student & Youth Travel®

What we do

- Promote the value of travel to social, cultural, and educational growth of students and youth
- Advocate for safe, professional, and ethical travel for students and youth
- Promote the business interests of those engaged in student and youth travel



SYTA

The **VOICE** of Student & Youth Travel®

How we do it

- Education: Learning, knowledge resources and content on student and youth travel
- Community: Networking and relationship building opportunities
- Advocacy: Research and statistics on the student and youth market
- Partnerships and alliances with global and domestic organizations that support student and youth travel



SYTA

The **VOICE** of Student & Youth Travel®

Overview of the Student/Youth Travel Industry

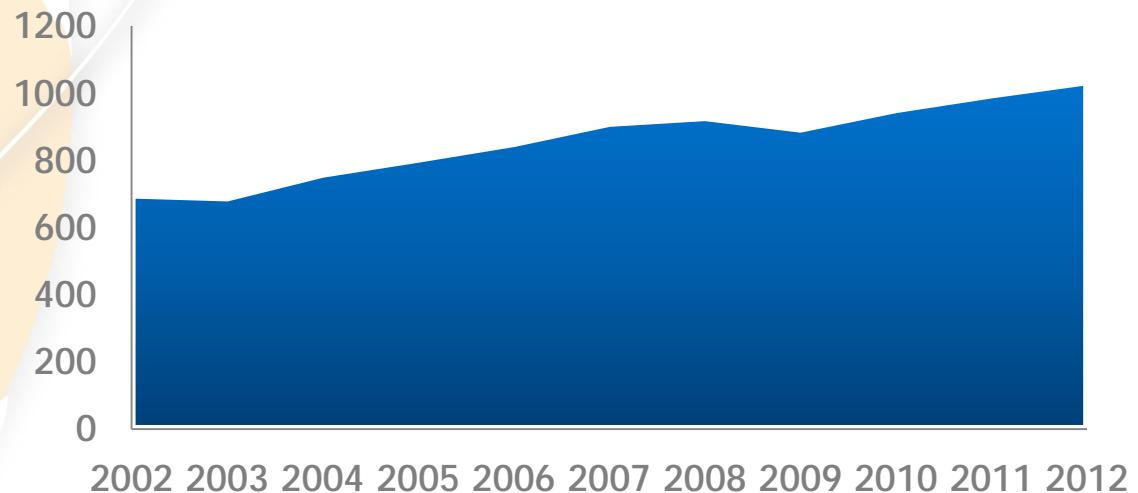


SYTA

The **VOICE** of Student & Youth Travel®

ABOUT GLOBAL TOURISM

International tourist arrivals (millions)



1 billion

INTERNATIONAL ARRIVALS
EXCEEDED IN 2012 FOR THE 1ST TIME



SYTA

The **VOICE** of Student & Youth Travel®

ABOUT YOUTH TRAVEL

Market value forecast

US\$ 185 bn



2011

US\$ 320 bn



2020

20% SHARE OF YOUTH TRAVEL
ON GLOBAL TOURISM

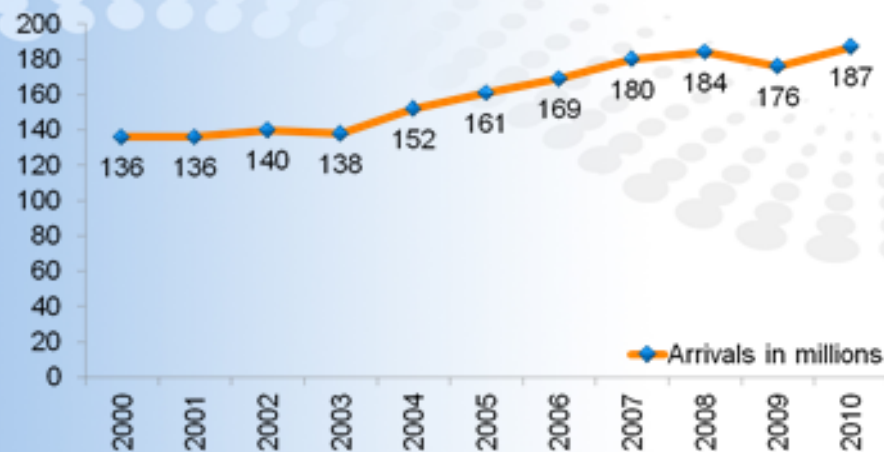


SYTA

The **VOICE** of Student & Youth Travel®



Youth & Student Travel Market International youth travel arrivals



Youth travel is increasingly more important within Global Tourism, accounting for 20% of Global Tourism. It is predicted that the youth and student travel market will reach 300 million arrivals by 2020.

Page • 10 Source: Data sourced or calculated from UNWTO World Tourism Barometer 2011; Youth Travel Industry Monitor 2009; Youth Travel Matters 2008

studentmarketing
Research & Business Development



SYTA

The **VOICE** of Student & Youth Travel®



Youth & Student Travel Market

Youth population 15-24: Total numbers & trends



The youth population will not increase significantly in coming years, but youth travel will increase as young travelers access more disposable income.

Page • 12 Source: UN Population Division, World Population Prospects, 2010 Revision

studentmarketing
Research & Business Development



SYTA

The **VOICE** of Student & Youth Travel®

ABOUT YOUTH TRAVELERS

- Youth travelers are **explorers**, not “escapists”
- They also travel **off the beaten path**
- They **stay longer** and **spend more** in destinations than average tourists
- Today’s youth travelers will **shape global tourism** in 5 - 10 years
- Positive experience makes them **lifetime visitors**



SYTA

The **VOICE** of Student & Youth Travel®

FIT VS GROUP TRAVEL

How youth travels?

ALONE
61%



IN GROUP WITH
CLASSMATES
16%



IN GROUP WITH
FAMILY
4%



IN GROUP WITH
FRIENDS
19%



SYTA

The **VOICE** of Student & Youth Travel®

studentmarketing
YOUTH TRAVEL CONSULTANCY

EDU TRAVEL BREAKDOWN

K-12



Gap year



Volunteer travel

Higher education



Language travel



Exchange

Educational trips



Adventure travel



Leisure group travel



FIT



Summer camps

A complete picture of the industry is missing.



SYTA

The **VOICE** of Student & Youth Travel®



Youth & Student Travel Market Market value of selected sectors



Higher Education generates the highest revenues in youth and student travel (US\$64,6 billion). In 2009, the Higher Education sector in USA represented almost US\$20 billion.

Source: Reflected numerous sources, including but not only: Education at a Glance 2010; LTM, 2009; US Department of State 2011; UK Border Agency 2011; Department of Foreign Affairs and International Trade 2011; Australian Government, Department of Immigration and Citizenship, 2010; Immigration New Zealand, Department of Labour 2011

studentmarketing
Research & Business Development



SYTA

The **VOICE** of Student & Youth Travel®

INBOUND TO THE US AND CANADA

Top 5 source markets (2011, total number of arrivals in millions)



CANADA (21.3)
MEXICO (13.5)
UK (3.8)
JAPAN (3.3)
GERMANY (1.8)



USA (11.6)
UK (0.6)
FRANCE (0.4)
GERMANY (0.3)
CHINA (0.24)

Types of senders:

- Student and youth travel agents
- Tour operators
- Other group tour organizers



SYTA

The **VOICE** of Student & Youth Travel®



US Market – Youth & Student Inbound Travel Comparison of youth & student travelers coming to the USA by age*



- Juniors (under 18) 2009
 - K-12
 - Language Travel
- Adults (over 18)
 - Higher Education
 - Language Travel
 - Au-Pair
 - Summer Work/Travel
 - Camp Counselor
 - Trainee + Intern

18+ youth travelers coming to the USA represent a larger demand group than juniors.

Source: StudentMarketing 2011, reflecting various sources
Page • 31 *Calculated in numbers of arrivals from only herein mentioned sectors and programs, other sectors and programs and independent youth travelers not calculated.

studentmarketing
Research & Business Development

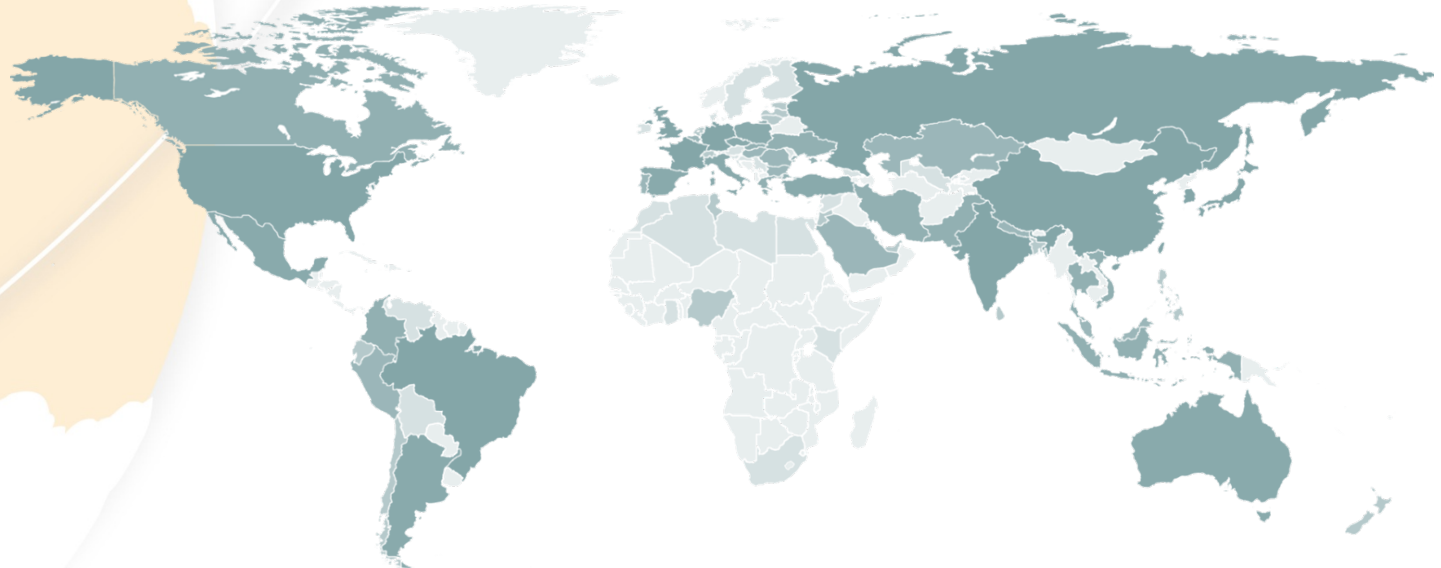


SYTA

The **VOICE** of Student & Youth Travel®

YOUTH/JUNIOR MARKET

Regional distribution of student and youth travel agents



0 - 50

51 - 100

101 - 200

201 - 300

301 - 500

501 - 800

800+



SYTA

The **VOICE** of Student & Youth Travel®

Key Market Segments

Group

Educational
Music/Performance
Dance/Cheer

Group/Individual

Sports & Leisure
Summer/Teen
Spring Break
Language
Graduation (HS)
College/University
Voluntourism

Individual

Backpack
Gap Year
Working Holiday
Study Abroad



SYTA

The **VOICE** of Student & Youth Travel®

United States and Canada

- There are 65 million young people (ages 5 – 25) in the US and Canada
- There are approximately 19 million college and university students in the US and Canada
- In 2010, the motorcoach industry provided more than 175 million passenger trips to students in US and Canada. This represents 25% of the total motorcoach industry in US and Canada



SYTA

The **VOICE** of Student & Youth Travel®

Top Destinations

According to Teach & Travel Magazine's Annual Survey, May 2012

United States	Canada/Mexico	International
New York	Toronto	Italy
Florida	Montreal	France
Washington, DC	Quebec City	England
Illinois	Niagara Falls	Germany
California	Calgary	Spain
Texas	Vancouver	Ireland
Massachusetts	Whistler	Costa Rica
Pennsylvania	Ottawa	Austria
Missouri	Banff	Switzerland
Tennessee	Puerto Vallarta	Australia



SYTA

The **VOICE** of Student & Youth Travel®

A Michigan State University study revealed that 86.4% of adults believe that travel is an essential part of a child's educational experience.

- 70% of young people travel with a purpose
- 80% return home more tolerant and respectful of other cultures
- The majority of youth travelers feel they have broadened their horizons and become more open-minded, flexible, and confident as a result of their travel experience
- More students tend to view themselves more as “global citizens” following travel experiences



SYTA

The **VOICE** of Student & Youth Travel®

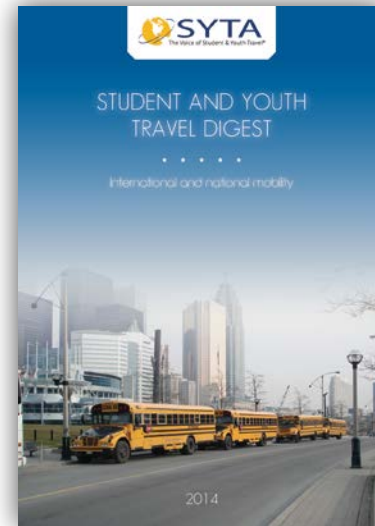
Noteworthy Trends in Student/Youth Travel

- Students are traveling at earlier ages, so they are likely to take more trips throughout their education...and be inspired to travel for personal reasons as adults – resume building
- Increasingly, schools require travel experiences to be tied to current classroom curriculum – justify travel
- Liability issues are more vital than ever, making experienced tour operators with proper credentials a valued resource – potential regulation
- Social media is playing an enhanced role in enriching trip experiences – photo sharing, class projects, communication with parents, and more



SYTA

The **VOICE** of Student & Youth Travel®



NEW SYTA RESEARCH: STUDENT AND YOUTH TRAVEL DIGEST



SYTA

The **VOICE** of Student & Youth Travel®

ABOUT SYTA RESEARCH

Student and Youth Travel Digest International and National mobility

- Will size the student and youth travel market
- First of its kind and caliber
- First in a series
- Targeting over 100,000 organizations and teachers
- Will enhance the recognition and position of the sector
- Will help individual stakeholders increase performance
- Will look at social impact of travel on young people

Launch: SYTA Annual Conference, August 2013

Research results: SYTA Annual Conference, Q3 2014



SYTA

The **VOICE** of Student & Youth Travel®

WHAT WE KNOW TODAY?

- Only partial data is available
- Only estimates
- The US is an attractive destination of youth travellers:

6 MILLION INTERNATIONAL
INBOUND ARRIVALS

- The US is an attractive destination of international students:

1.2 MILLION INTERNATIONAL STUDENTS
(SECONDARY, LANGUAGE AND TERTIARY STUDENTS)



SYTA

The **VOICE** of Student & Youth Travel®

WHY WE NEED TO KNOW MORE?

- Existing data is not sufficient
- Informed decision-making not possible

The findings will allow us to:

- Bring benefits to individual organizations
- Gain recognition for the industry in the media
- Represent the industry before governments and investors



SYTA

The **VOICE** of Student & Youth Travel®

WHAT WILL THE RESEARCH TELL US?

Bring reliable, comprehensive data and analyses on:

- Market size and market value of student and youth travel
- Customer profile and preferences
- Purpose of travel
- Trip duration
- Preferred destinations
- Preferred activities and programs
- Preferred type of accommodation
- Social impact of travel
- And many more



SYTA

The **VOICE** of Student & Youth Travel®

Student Marketing Group





SYTA

The **VOICE** of Student & Youth Travel®

Message Points - Education

- Travel with a Purpose
- Travel is essential to a complete education
- Traveling Classroom
- Travel creates global citizens



SYTA

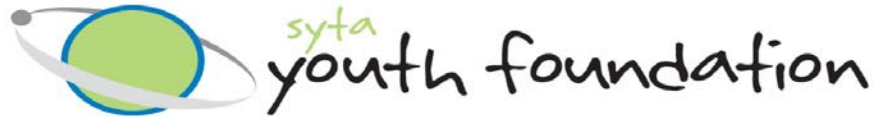
The **VOICE** of Student & Youth Travel®





SYTA

The **VOICE** of Student & Youth Travel®



- Founded in 2000 and provides funding for kids who lack the financial resources to travel with their school or youth group
- Awarded more than **\$500,000** in travel scholarship grants since inception
- Serving more than 1,000 kids each year (and growing!)
- Four core programs: Road Scholarships, Silver Lining Program, Next Generation, Running for Youth



SYTA

The **VOICE** of Student & Youth Travel®

Impact of Educational Travel on Urban Middle School Students

When students participate in academic travel, they are exposed to a variety of new ways of viewing the world and themselves. However, a search for data supporting the benefits of educational travel is lacking. No quantitative and qualitative studies can be found for the effects of travel with urban middle school students.



SYTA

The **VOICE** of Student & Youth Travel®

Phase 2 Research: Alignment of Research with Instructional Core

Research question(s) and hypotheses for PhD Project

- Does participating in a trip to Washington, DC, Europe or both have an impact on students' graduation (and drop-out) rates, CSAP scores, GPA, attendance, and suspensions when compared to the average for students who attended Middle School and the average for the students who did not go on trip classes?
- It is hypothesized that students who travel with the teacher perform better on all indicators than the average for Middle School and non-trip classes.
- It is also hypothesized that students who travel with class to both DC and Europe perform better on indicators than the average for Middle School or for just DC or just Europe.



SYTA

The **VOICE** of Student & Youth Travel®

SPONSORS

- Support student and youth travel
- Funding of US\$10,000

Getting benefits in return:

- Global recognition as a Sponsor
- Extensive and multiple brand exposure on all materials and releases
- Advanced access to data and findings
- Bespoke analysis (for your own organization)
- Opportunity to contribute to the questionnaire
- Priority right to register for a sales mission
- More details here (link to online version of Call for Sponsors)





SYTA

The **VOICE** of Student & Youth Travel®

PARTNERS

- Support student and youth travel
- Re-distributing the questionnaire
- To their own contacts (not sharing them)

Getting benefits in return:

- Affiliation and recognition as a Partner
- Extensive and multiple brand exposure on all materials and releases
- Advanced access to data and findings
- Bespoke analysis (for your own organization)
- More details here (link to online version of Call for Partners)

