

The European market potential for SAVE tourism

Last updated:

13 January 2020

SAVE tourism — which stands for scientific, academic, volunteer and education tourism — is an important niche market. Within SAVE tourism, volunteer and education tourism are the largest segments. Although volunteer tourism has been intensely criticised recently as a form of vacation for do-gooders, it remains relevant as a product, as young travellers try to use tourism as a way of contributing to society.

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1. Product description

SAVE tourism is a substantial niche market of [sustainable tourism](#), which can be further divided into sub-products — scientific, academic and educational tourism — that overlap somewhat. As a common theme, these forms of tourism benefit both the destination and the traveller.

Scientific tourism

Scientific tourism refers to travel that helps destinations with knowledge and support to protect the environment. It also helps foster global development and positively impacts communities. Scientific tourism is done by professionals in a specific field of expertise. They could come from research institutions, universities, non-profit organisations, medical organisations, etc. These types of trips include environmental studies, marine observation, anthropological research and archaeological expeditions.

Academic tourism

Academic travel refers to travel by professors, researchers and students for academic purposes. This could relate to, for example, studying abroad programmes, thesis research, graduate work, visiting scholarships and short-term school trips combined with exploring a specific destination, area, region or country for cultural or environmental purposes. By means of experiential learning, this form of tourism helps travellers to gain knowledge and acquire experiences that immerses them into a different culture and way of life.

Volunteer tourism

Volunteer travel, also known as ‘voluntourism’, concerns travel for the purpose of volunteering in projects and activities in combination with the conventional elements of tourism travel — arts, culture, geography, history and recreation. The reasons for travellers to participate in volunteer tourism vary from personal goals to intercultural, academic, and professional development opportunities, including relational diplomacy, global citizenship, student activism, and civic engagement. This form of tourism is increasingly being criticised for its do-gooder character. Volunteer tourism can be done in many areas, as listed in table 1 below.

Table 1: Volunteer tourism areas

Areas	Activities
Community welfare	Caring for children, the elderly, persons with disabilities
Teaching	Teaching a foreign language, coaching sports, etc.
Environmental	Nature conservation, wildlife protection, environmental clean-up
Medical	Hospital support, pandemic support (e.g. HIV, Ebola)
Building	Construction, renovation, including after natural disasters
Research	Wildlife monitoring, mapping and zoning
Human rights, legal	Land use and ownership, water and natural resources management, children's rights, etc.

Educational tourism

Educational tourism helps provides travellers with learning experiences and opportunities for self-improvement, job development, career enhancement, self-actualisation, acquiring new or improving knowledge. This form of tourism includes, among many others, student travel, language courses, cooking tours, traditional craft workshops, educational cruises and boat tours, school trips, seminar holidays, study abroad programmes, self-enhancement holidays and experience-based learning. Often, education tourism is done in combination with leisure and relaxation. The target group is not necessarily restricted to a certain age, however, education is regarded as a primary travel motivation among younger travellers. Educational tourism creates economic opportunities to host communities and facilitates knowledge exchanges between host communities and tourists.

2. What makes Europe an interesting market for SAVE tourism?

SAVE tourism has become a major tourism niche market. It is a market **dominated by youth travel**, a group that is known for having too much time and not enough money, but intent on doing 'experiential' travel. **Generation Y** (millennials) and **Generation Z** travellers are keen on trying new things and engaging in skills-based learning while travelling: youth travel accounts for almost one quarter of all international tourism, so it is a lucrative market. Within SAVE tourism, volunteering and educational tourism are the largest segments. Europe, the US and Asia are responsible for the largest shares in youth travel. In Europe, most youth travellers come from the Scandinavian countries, while the Mediterranean and Eastern European countries show the fastest increases.

Some 10 million volunteers carry out a wide variety of projects every year worldwide. Volunteer tourists spend an estimated €930 million to €1.45 billion per year on these trips. Booking.com named volunteering the number-one travel trend for 2019.

The rapid growth of educational tourism has been propelled by changes in attitude towards education, the rise of lifelong learning, new education styles, among other factors, such as growth in student mobility globally. Several organisations focus on education tourism and they foresee sustained increases for it.

Table 2: Student and youth travel market facts

STUDENT AND YOUTH TRAVEL MARKET FACTS:

- The youth travel segment has grown faster than global travel overall, rising from 136 million international trips in 2000 to 187 million in 2010, valued at €156 billion according to [WYSE Travel Confederation](#). In 2010, youth travel represented 20% of global travel according to the UNWTO.
- By 2020, the youth travel market is expected to exceed €280 billion, with nearly 300 million international trips per year, according to WYSE Travel Confederation and UNWTO.
- Spending in most sectors of student and youth travel ranges between **€900 and 5,500 per trip**.
- Higher education is **the best performing sector**.
- Especially the **volunteer sector is growing and developing**, the preferred programmes being humanitarian aid and community development.
- **Youth travel accommodation occupancy levels remained strong** during the recession and outperformed the hotel sector.

WHAT TO KNOW ABOUT STUDENT AND YOUTH TRAVEL, according to SYTA and WYSE Travel Confederation:

- Growth factors in student and youth travel include people travelling at younger ages, increased student population and travel programmes becoming a more common expectation and practice among school systems.
- Travel is a source of education as well as career and self-development for students and youth.
- Students and youth want to become engaged when visiting destinations and attractions.
- Students and youth utilise the newest technologies when travelling.
- Students and youth like contributing to places they visit.

Sources: SYTA, WYSE Travel and UNWTO.

Pioneering organisations in SAVE tourism include:

- [Africa Foundation](#)
- [Salva Verde](#) (Costa Rica)
- [MICATO safaris](#) (USA)
- [Lapa Rios](#) (Costa Rica)
- [Sarapiquí Conservation Learning Center](#) (Costa Rica)
- [Koh Sukorn Island](#) (Thailand)

Transitions Abroad (USA) lists [the most popular volunteer programmes for 2019](#) in [Africa](#), [Asia](#), and [Mexico and Central America](#).

Several Europe-based intermediaries and global network organisations provide information for SAVE travellers, and support businesses to tap into this market. Examples of consumer-oriented providers include:

- [Projects Abroad](#) (UK) offers different volunteer tourism projects generally located Nepal, Ghana, Cambodia

and South Africa.

- [WWOOF](#) is a worldwide network of organisations in 132 countries that offers travellers the opportunity to live, work and learn in a an organic farm in another country.
- [SAVE Travel Alliance](#) (USA) a network designed to connect responsible travellers to sustainable destinations, which also provides information on how to create travel experiences.
- [Global Vision International](#) (UK) provides impact-driven volunteering, internships and service learning programmes in various regions of the world.

Network organisations that could help you with getting access to this market include:

- [BETA, the British Educational Travel Association](#) (UK) represents some of the biggest and best-known businesses in the youth, student and educational travel industry.
- [The International Ecotourism Society](#) (USA) represents stakeholders from 190 countries, working to make travel and tourism more sustainable; provides guidelines and standards, training, technical assistance, and educational resources.

Other leading organisations involved in SAVE include:

- [Topdeck Travel](#), Australia
- [Brightspark Travel](#), United States
- [World Strides Educational Student Travel](#), United States
- [Lindblad Expeditions](#), United States
- [Lions Club International](#), United States with [offices](#) in all European countries

Tips:

- Consult [Sustainable Tourism Online](#). This is a valuable travel development resource provided by Australia's Sustainable Tourism Cooperative Research Centre, focusing on three themes: Destinations and Communities, Business Operations and Parks, and Culture. The website provides numerous tools, case studies, and guidelines for destination planning, implementation, and performance measurement. Review these tools and information for guidance in developing SAVE travel products.
- [This business plan](#) to establish a SAVE tourism centre in Smolyan, Bulgaria is a good resource to help in developing a self-supporting, independent entity designed to attract, host, and serve the SAVE market.
- USAID has a [valuable toolkit for business](#) to design a SAVE travel and tourism development strategy.

3. Which European countries offer most opportunities in SAVE tourism?

Although it is one of the fastest growing sectors in tourism, there are [no comparable statistics](#) measure the size of the volunteer tourism market. [According to one commentator](#), it is possibly immeasurable. Western Europe and North America are considered the most important source regions for international volunteers.

Subsequently, the largest [volunteer tourism market in Western Europe](#) is the UK, followed by Ireland, Germany, France and the Netherlands.

We have used international student mobility as an indicator of educational tourism. According to the OECD, the EU countries with the largest shares of national students going abroad are the following:

- Slovakia: 18.3%
- Estonia: 8.1%
- Ireland: 6.8%
- Latvia: 6.4%
- Austria: 5.1%

- Greece: 4.9%

4. What trends offer opportunities or pose threats in the European SAVE tourism market?

Experiential travel and nomadism by young travellers

The growing importance of [Generation Y \(millennials\)](#) and Generation Z travellers in the tourism market drives the demand for experiential travel and nomadism.

Experiential travel means travelling not just to visit a place, but also to learn a lasting and shareable skill. It is also referred to as purposeful travel because it usually includes personal-growth experiences. The range of activities in this category includes glacier hiking, bungee jumping, scuba diving, mountain biking, cooking, painting, cultural excursions and historically themed tours.

[Nomadism is also on the rise](#). Although it still accounts for a negligible share of the travel industry (0.6%), that is equivalent to 1.8 million trips. According to WYSE, however, that it is enough for some destinations to have started catering to nomads with co-working spaces, housing, and other services. Digital nomads share their experiences on blogs that [provide lifestyle advice](#), which, according to New Horizons, influences younger generations.

Examples of activities related to nomadism include environmental tours, skill learning courses, safari tours, language courses, [adventure activities](#), and [history and culture walking tours](#), which can be supported by virtual reality to such as the [virtual reality walking tour developed by Croatia Travel Co](#).

Tips:

- Be clear. Travellers want to know that their [money and efforts are meeting a legitimate need](#).
- Offer travel experiences that really matter to the traveller, as SAVE tourists select their tours with care.
- Focus on exploration, interaction and emotional experience. To meet the lifestyle requirements of millennials and Generation Z travellers, you must try to connect with them by being transparent and tech-savvy.
- Offer short-term volunteering options that may fit into a regular holiday.

Criticism of volunteer tourism is growing

Experts we interviewed had different opinions about the future of volunteer tourism, but all agree that it is being increasingly criticised. According to one of our interviewed experts, there is a growing perception among millennials that, for example, going to a developing country to build a school is not helping the school system in that country more than it is helping tourists feel good about themselves. Most of the criticism of volunteer tourism focuses on these subjects:

- Volunteers don't have the skills to contribute. Although academic tourism can be seen as a form of volunteer tourism, most volunteers don't have more skills than locals, which can cause serious problems. For example, a school made by non-professional builders may be very unsafe.
- Volunteer tourism doesn't offer a stable base for projects because volunteers come for a short period of time and leave quickly. Many times, there is no follow-up.
- Volunteer tourism contributes to the image that developing countries need help to function properly.
- Volunteer tourists may steal jobs from local people.
- Volunteer tourism may stimulate criminality. Australia [recently passed legislation](#) recognising that children were being trafficked and [exploited as slaves](#) in orphanages visited by Australian tourists.

Best practices in volunteer tourism include:

- Homestay programmes in Thailand gives tourists the opportunity of living in a small Thai village, helping to host visitors, making meals, doing laundry, and growing produce. See [XploreAsia](#) for more details.
- [La Choza Chula](#), in Guatemala, runs turtle and mangrove tours, cooking classes, homestay programmes, cultural immersion programmes, volunteer programmes. They also offer weekly English classes for their guides, funded the construction of a library, set up a mobile library, and built a computer lab and a secondary school.


Tips:

- Many European students look for opportunities to work abroad as a volunteer or intern every year. They expect to be provided with a clear assignment from the SME or organisation before making any firm travel arrangements. These students also expect compensation for their contribution, such as an allowance.
- Read more about criticism of volunteer tourism on [The Conversation](#), the [Daily Beast](#) and [The Guardian](#).


This study has been carried out on behalf of CBI by [Molgo](#) and [ETFi](#).

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