

INSIGHTS INTO THE AFFINITY EDUCATIONAL TRAVEL MARKET: 2018-2019

By J. Mara DelliPriscoli and
Kathy Edersheim



Educational Travel Consortium

At the crossroads of life long learning & travel





This White Paper is sponsored by the Educational Travel Consortium (ETC), a global professional community facilitating knowledge exchange, professional development, data aggregation, cross-pollination of ideas, leadership evolution, global collaborations, industry partnerships, and program innovation in the field of affinity educational travel.

At the ETC's annual global conference and through online educational and networking member resources, ETC convenes a convivial community of nonprofit and for-profit travel professionals with a mission to educate, inspire and foster innovative and sustainable affinity educational travel programs to advance lifelong learning, stewardship and engagement through travel.

Table of Contents

Table of Contents	1
Introduction	5
The Travel Industry Today	7
Travel Industry Information	7
Transformational Travel: A Changing Industry	11
The Affinity Educational Travel Market	13
Foundations of Affinity Educational Travel	13
Educational Travel Program Models	15
Mission Beyond Commission...and Why it Matters	17
Operations	20
Tour Operators	24
Marketing	25
Technology	26
Travelers by the Numbers	27
Trips by the Numbers	29
Trends, Opportunities, and Challenges	31
Competition	32
Challenges	34
Key Concluding Considerations	41
Guiding Questions	43
Afternote	45
Appendices	47
The History of Educational Travel	47
Data Sources	50
About the Authors	57

“Travel is more than the seeing of sights; it is a change that goes on, deep and permanent in the ideas of living.”

Miriam Beard

Executive Summary

Presented as an overview of the Educational Travel industry, this White Paper analyzes the affinity educational niche travel market and how nonprofit sponsoring organizations such as universities, cultural entities, and conservation organizations play a crucial role as conveners of alumni and members for personally enriching educational travel. With an increasing number of people seeking to satisfy their passion for immersive learning, it is the Golden Age for affinity educational travel.

Non-profit affinity sponsors have a singular advantage over any commercial competition in the loyalty and dedication of their members/alumni when offering a travel experience aligned with their mission. Customized programs serve to showcase an institution’s expertise, offer deep engagement, and build brand champions. Ultimately, it is likely to be a program managed for mission-alignment driving engagement and serving as high-touch stewardship that will prove to be the most valuable to the institution and provide the best experience for the travelers.

In the context of the current strong economy driving a strong travel market, educational travel programs have the luxury of success with the status quo models. In the broad travel market, there have been seismic shifts in the design of tours and marketing. The swift pace of change in travel has left the affinity travel programs susceptible to growing competitive threats and a need to further differentiate themselves.

A few major points about the state of affinity educational travel consistently emerge from the data amassed for the White Paper and discussions with industry experts and seasoned travel planners:

- Travel planners and the sponsoring institution have an attenuated relationship with the travelers because of outsourcing so much of the process from tour planning to customer service including tour inquiries and payment collection.
- The intricate balancing act demanded by having three priorities - mission-aligned engagement, stewardship/fundraising, and net revenue generation - has a significant impact on program design, staff required, and programs offered.
- The mainstream tourism industry is competing with the universities, conservation and cultural organizations for leadership of educational and experiential travel by effectively offering behind the scenes visits, outstanding faculty and curators, expert lectures, and unusual itineraries in their direct to consumer offerings.
- With the greater availability of educational content, commercial travel programs are going beyond lifelong learning to facilitating deeper experiential learning offerings through physical activities, facilitated reflection, and people-to-people exchanges.
- It is up to travel planners to select and offer tours and activities that appeal to the shifting traveler lifestyles and interests through institutional engagement.
- Institutions sponsoring educational travel need to continue to professionalize their operations with personalized communications to travelers using digital marketing platforms and other new technologies.

There is growing competition from new entrants into the affinity educational travel market including loose affinity groups (often existing through online platforms), corporate entities, and more nonprofits.

Sponsor institutions need to weigh pressure points on revenues against the risk of missing stewardship opportunities or even losing travelers to the competition offering a more attractive value proposition or true affinity aligned travel experience. And as mainstream competition challenges sustainability long term, customization of institutionally sponsored travel programs – those providing a unique travel experience reflecting the sponsoring organization - will prove to be essential to differentiate offerings that lead to success.

This White Paper will help identify the challenges and the opportunities for affinity educational travel in the current competitive landscape.