THE CHALLENGE OF COVID-19 FOR YOUTH TRAVEL

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Abstract

This paper analyses the effects of the first seven months of the Covid-19 pandemic on youth travel. Surveys of youth travel businesses between March and September 2020 showed youth tourism businesses were severely impacted, with a 26% drop in business volume in Quarter 1 of 2020 falling to -70% by May 2020. Business prospects for the year 2020 were dire and more than 80% of businesses expected their business prospects to get worse over the coming year. The effects of the pandemic were felt in all world regions and across almost all industry sectors. Youth travel businesses adopted a range of tactical and strategic measures in response to the crisis, including changing terms and conditions, increased marketing, creating partnerships and shifting business online. As youth travel depends on social interaction there are major challenges for the industry in future, but also a number of potential opportunities, such as the growth in domestic travel and the rise of digital nomads.

Keywords: Coronavirus / Covid-19; Crisis; Business impacts; Youth travel; digital nomads.

O DESAFIO DA COVID-19 PARA AS VIAGENS DOS JOVENS

Resumo

Este documento analisa os efeitos dos primeiros sete meses da pandemia de Covid-19 sobre as viagens dos jovens. Pesquisas com empresas de viagens juvenis entre março e setembro de 2020 mostraram que as empresas de turismo juvenil foram severamente afetadas, com uma queda de 26% no volume de negócios no primeiro trimestre de 2020 caindo para -70% até maio de 2020. As perspectivas de negócios para o ano 2020 foram terríveis e mais de 80% das empresas esperavam que suas perspectivas de negócios piorassem durante o próximo ano. Os efeitos da pandemia foram sentidos em todas as regiões do mundo e em quase todos os setores industriais. As empresas de viagens juvenis adotaram uma série de medidas táticas e estratégicas em resposta à crise, incluindo a mudança dos termos e condições, aumento do marketing, criação de parcerias e mudança de negócios on-line. Como as viagens dos jovens dependem da interação social, há grandes desafios para a indústria no futuro, mas também uma série de oportunidades potenciais, tais como o crescimento das viagens domésticas e a ascensão dos nômades digitais.

Palavras-chave: Coronavírus / Covid-19; Crise; Impactos nos negócios; Viagens de jovens; Nômades digitais.

EL RETO DE COVID-19 PARA LOS VIAJES DE LOS JÓVENES

Resumen

Este documento analiza los efectos de los primeros siete meses de la pandemia de Covid-19 en los viajes de los jóvenes. Las encuestas realizadas a las empresas de viajes para jóvenes entre marzo y septiembre de 2020 mostraron que las empresas de turismo juvenil se vieron gravemente afectadas, con una caída del 26% en el volumen de negocio en el primer trimestre de 2020, que se redujo hasta el -70% en mayo de 2020. Las perspectivas de negocio para el año 2020 eran nefastas y más del 80% de las empresas esperaban que sus perspectivas de negocio empeoraran durante el próximo año. Los efectos de la pandemia se hicieron sentir en todas las regiones del mundo y en casi todos los sectores de la industria. Las empresas de viajes para jóvenes adoptaron una serie de medidas tácticas y estratégicas en respuesta a la crisis, entre las que se incluyen la modificación de las condiciones, el aumento de la comercialización, la creación de asociaciones y el cambio del negocio en línea. Dado que los viajes de los jóvenes dependen de la interacción social, el sector se enfrenta a grandes retos en el futuro, pero también a una serie de oportunidades potenciales, como el crecimiento de los viajes nacionales y el aumento de los nómadas digitales.

Palabras clave: Coronavirus / Covid-19; Crisis; Impactos empresariales; Viajes de jóvenes; Nómadas digitales.

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1 INTRODUCTION

As the UNWTO (2020) stated, "The outbreak of Coronavirus COVID-19 presents the tourism sector with a major and evolving challenge." It is clear that the effects on tourism are severe, with countries closing their borders and airlines scaling back their operations, and many going out of business. As with previous crises, including SARS, Ebola and the global economic downturn, it is almost certain that recovery will follow. However, the question is how long will the effects last, and when will the eventual recovery begin? These kinds of questions highlight the need for research on the effects of such events, and the attitudes of those effected.

This paper considers the effects of Covid-19 on the youth travel sector, which has been particularly heavily impacted because of the social motivations underlying much youth travel. We analyse data collected from youth travel businesses over the first seven months of the pandemic, from March to September 2020. During this period we charted how the pandemic unfolded and how increasing travel bans and border closures impacted on business operations.

The novel coronavirus emerged in Wuhan, China in November 2019, although its existence was not confirmed until January 2020, when the number of cases began to increase rapidly and also spread beyond China. During February 2020 cases in China climbed steeply to reach 80,000 by the end of month, and cases outside China rose to 7,000. By March 18th cases in other countries (132,000) had far surpassed those in China, where the spread of the virus had been slowed by rigorous containment measures. The introduction of travel restrictions and bans had a progressively severe impact on travel, particularly after the World Health Organisation pronouncement of a pandemic on 11 March 2020.

It is obviously too early to assess the full effects of the crisis, as the long-term impacts are still unfolding. Despite this, there has already been significant academic analysis and commentary on the Covid-19 crisis. Early studies were based on news reports and general data from international organisations (e.g. Jamal and Budke, 2020), and only slowly are more empirical studies emerging (Gössling, Scott, & Hall, 2020), and few previous studies have collected data directly from tourism businesses.

This paper presents data from the WYSE Travel Confederation research programme, which has been monitoring the performance of the youth travel industry since 2002 (UNWTO/WYSE 2007). This research programme enables us to take the pulse of the global travel industry at this crucial moment, and also to compare the current crisis with previous events that have been the subject of research.

When the pandemic emerged in early March 2020, the UNWTO (2020) estimated that "global international tourist arrivals could decline between 1% to 3%, down from an estimated growth of 3% to 4% forecast in early January 2020", with an estimated loss of US$ 30 to 50 billion in spending. In hindsight, this relatively optimistic initial appraisal was quickly overtaken by events. By the end of March international travel had declined by 97%, and over the first eight months of 2020 international travel fell by 70% overall.

However, the pandemic has impacted different parts of the tourism industry in different ways. The figures for overall international arrivals only reveal part of the picture. By surveying travel industry representatives directly, we hope to generate a picture of the effects on the tourism industry, and how these effects have been manifested in different sectors and world regions. Through continuous monitoring over a period of several months following the emergence of the pandemic we have also been able to chart the reactions of the travel industry and the strategies they have adopted to mitigate the effects of the crisis.

The research questions addressed in this paper are therefore: 1) What are the current and potential future impacts of Covid-19 on the youth travel industry? 2) How are these impacts distributed by youth travel industry sector and world region? 3) How have youth travel providers reacted to the pandemic in terms of business strategies?

In order to put the results of this research into perspective, the literature review concentrates on previous comparable events in tourism in general and world health in particular, as well as an initial review of the emerging Covid-19 literature.

2 LITERATURE REVIEW

According to the UNWTO (2020) "International tourism has only experienced declines in 2003 following SARS and the Iraq war and in 2009 amid the economic and financial crisis, with strong and rapid recovery the following years." The hope of a rapid rebound was probably the basis of the initial UNWTO expectation that global travel will only decline by around 3% in 2020.

A similar rebound after a sharp decline was seen in 2003, when pent-up travel demand after the crisis ensured that the drop in international travel was only 2% in 2003, and there was a sharp increase of 10% in 2004. However, the response to Covid-19 has not only included travel restrictions and cancellations, but also extensive controls on personal movement and the closure of public services and businesses in many countries around the world. This also comes on top of a weakening global economy, and Covid-19 has already had major impacts in China, one of the powerhouses of economic and tourism growth.

Analysis of previous crises show that tourism can be severely impacted by a range of factors, including terrorist attacks (Araña and León, 2008), natural disasters such as earthquakes, tsunamis and extreme weather, financial crises (Sheldon and Dwyer, 2010) and outbreaks of disease. It can be argued that such crises are likely to increase, given the effects of climate change on extreme weather events and the increase in global travel as a conduit for the spread of infectious diseases. However, Novelli, Burgess, Jones and Ritchie (2018), analysing the effects of Ebola, argued that the effect of infectious disease on tourism was particularly under-researched. Wang's (2009) review of different crises indicated that inbound tourism to Taiwan declined the most during the SARS outbreak in 2003, followed by the September 21 earthquake in 1999 and the September 11 attacks in 2001, whereas the impact of the Asian financial crisis in 1997 was relatively mild.

The severe acute respiratory syndrome (SARS) outbreak in Asia in 2003 probably has the most parallels with the Covid-19 case. SARS caused 'global panic' in 2003, although drastic containment measures limited the spread of the disease to 8096 infections, almost exclusively in Hong Kong, China, Taiwan Province, Singapore, and Canada (Henderson and Ng, 2004; McKercher and Chon, 2004).

The outbreak triggered a World Health Organisation 'general travel advisory', with dramatic declines in arrivals to affected countries. International tourism to China, Hong Kong, Taiwan and Vietnam declined by 58% in the first quarter of 2003 (Henderson and Ng, 2004). In three months, 774 people died, indicating a mortality rate of around 10%, significantly higher than the 3% currently indicated for Covid-19 (Worldometer, 2020). Even so, McKercher and Chon (2004) argued that the tourism collapse was due more to government reactions to SARS than the disease itself, which they indicated "had no more impact on global tourism than any other seasonal influenza outbreak."

This is an interesting argument at a time when governments are adopting different types of measures to contain Covid-19, many of which have severe implications for travel. The eventual impact of SARS and the Iraq War on international tourism arrivals were a 2% drop relative to 2002, when an increase of around 4% might have been expected. This indicates a relatively minor impact globally, in contrast to the sharp declines in affected regions.

Other disease-related crises have also had a significant impact on tourism. For example, Page, Song and Wu (2012) analysed the impact of H1N1 influenza virus—or swine flu, on international arrivals to the UK in 2009. Using econometric modelling they found that swine flu was responsible for an estimated loss of 1.6 million visitors in the second quarter of 2009 or an 18% decline in international tourism arrivals. Novelli et al. (2018) in their study of the Ebola outbreak in Africa in 2013 and 2014 indicated the effect of sensational reporting by the media, so that even unaffected countries, such as the Gambia, suffered dramatic falls in tourism.

It is clear that Covid-19 has already had a much more significant impact on the global travel industry than previous health crises. It has a much greater geographical extent, leading to the widespread implementation of travel bans and lockdowns affecting domestic travel. Not surprisingly, therefore, the Covid-19 pandemic has caused major declines in travel and financial challenges for the global travel industry. For example, Sharma and Nicolau (2020) produced an economic valuation of the effects of COVID-19 on the on the hotel, airline, cruise and rental car industries within a few weeks of the crisis starting. They found a substantial fall in valuation for all four sectors, and a particularly severe effect for the cruise industry. In the hospitality industry Gursoy and Chi (2020) reviewed customer research indicating that over 50% were not willing to eat in a restaurant or stay at a hotel, citing safety as their main concern.

Comparisons of different world regions were made by Uğur and Akbıyık (2020) on the basis of Tripadvisor comments from travellers at the start of the crisis. This showed a rapid spread of traveller concern from Asia to Europe and then the US as the pandemic unfolded in March. This shows the rapid response of travellers to the crisis, as many began cancelling trips immediately, with 'cancellation' being mentioned in 41% of travellers' comments. Travel insurance scored as the second most frequent phrase after corona virus. Other analyses have been produced locally and regionally, for example in Indonesia (Dinarto, Wanto, & Sebastian, 2020), the Philippines, (Centeno & Marquez, 2020) and Austria, an early hub for the virus in Europe (Correa-Martínez et al., 2020).

Gössling, Scott and Hall (2020) made an early global assessment of the impact of Covid-19 based on secondary data, showing that travel bans were affecting over 90% of the global population, with the number of global flights dropping by more than half and hotel occupancy dropping by up to 90% in some countries. They argue that this means critically reconsidering the volume growth model for tourism, and that the COVID-19 crisis should be seen as an opportunity to reconsider current models of tourism that imply more tourists mean greater benefits.

Adopting a comparative analysis of more than 90 countries, Farzanegan, Gholipour, Feizi, Nunkoo and Andargoli (2020) show that countries with high flows of international tourism are more prone to COVID-19 outbreak. This indicates that travel causes Covid, suggesting more controls are needed on the health aspects of the tourism industry and respect for health and safety standards in order to control the pandemic.

Few studies have looked at business effects and reactions. Hao, Xiao and Chon (2020) looked at the impacts of COVID-19 on China's hotel industry. Hotel demand showed a sharp decline in business in January and February, followed by a gradual recovery in the next few months as the pandemic was brought under control.

They outline a number of strategies for dealing with the effects of the pandemic, including diversification, product design and investment preference, digital and intelligent transformation, and market reshuffling. This review of current Covid-19 research indicates a focus on secondary data sources and demand trends, with less attention being paid to the real-time impacts on businesses or business reactions to the pandemic.

The current study cannot provide an overall evaluation of the effects of the Covid-19 outbreak, given the continuing and dynamic nature of the crisis. However, this study has the benefit of reflecting the reactions of the travel industry to impacts of the crisis and how businesses have adapted themselves to this challenging environment.

3 METHODOLOGY

The data for this study were collected between March and September 2020 from a convenience sample of respondents who have links with WYSE Travel Confederation (WYSE Travel Confederation, 2020), which represents youth, student and educational travel organisations. As a global trade association, WYSE is well placed to disseminate the survey to travel industry representatives in different sectors of tourism around the world.

The survey was distributed as a web-based questionnaire, and because of the fast-moving nature of the crisis the aim was to collect many responses in a short time period. The seven monthly waves of the survey attracted a total of 2780 responses from companies worldwide. Respondents included organisations specialised in youth travel products as well as those representing mainstream travel products. Most major sectors of the travel industry were represented among the respondents.

Over the period of the survey the number of respondents fell significantly, as might be expected in a situation in which many businesses ceased to operate. Monthly responses fell from a maximum of 599 in March to a minimum of 321 in August.

Not surprisingly, a large proportion of the respondents had youth travel as their main focus of business. Youth travel is defined here as travellers aged 15 to 29, following the recommendations of the UNWTO/WYSE industry review (2007). Youth travel is estimated to account for around 23% of international tourism arrivals (WYSE Travel Confederation, 2018).

All respondents were asked about the impact that the global COVID-19 (Coronavirus) outbreak has had on their core business. Specific questions also related to the change in business demand experienced in Q1 2020 vs the same period in 2019, the business outlook for the coming calendar year, top concerns for the immediate and long term, actions taken in response to COVID-19, and the impact of COVID-19 on group travel business.

As the pandemic developed, we also included questions on specific issues of interest to the sector, including the shift to digital operations and the targeting of new customer segments, including digital nomads (Morrill & Richards, 2020).

4 ANALYSIS OF RESULTS

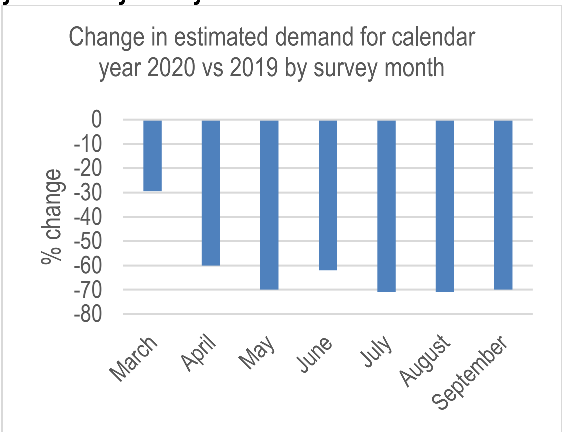
From the onset of the crisis in March, survey respondents expressed a high level of concern about the effects of Covid-19 on their business. More than 80% of businesses believed that their business prospects will be worse over the coming year, and this grew to over 85% by September.

The initial decline in demand was relatively small, with March respondents reporting a 26% drop in demand for business in Q1 2020 compared to the same period in 2019. But by April respondents were reporting an average 60% fall in demand compared with the same period in 2019, and this increased to a 70% decline by May. Estimated annual declines in business showed a similar trend, with a 29% average fall being forecast in March, rising to 70% by May (Figure 1).

The steep fall in demand at the onset of the crisis underlines the rapidly deteriorating business environment. Respondents completing the survey in the period 3-4 March reported an average decrease in business in Q1 2020 of 28%, while those reporting from 5-9 March had significantly higher estimates, averaging almost 35% decline.

Similarly, those reporting on 3-4 March were expecting a drop in business for the following calendar year of almost 24%, but by 5-9 March the expected reduction was almost 34% (this was even before the declaration of the pandemic on March 11, 2020).

Figure 1: Estimated change in demand for the calendar year 2000 by survey month.



Source: own elaboration from the research data.

The rise in reported cases outside China from 17,500 to 32,800 (Johns Hopkins University, 2020) at this time was no doubt a major contributor to increased pessimism. The expansion of the coronavirus quarantine zone to cover much of northern Italy on 8 March might also have increased perception of the serious implications of the outbreak for the travel industry. There was no significant difference between business sectors in March, but youth travel specialists reported a slightly lower decrease in demand (24%) for Q1 2020 than non-youth travel specialists (30%). In the March survey respondents were anticipating a 30% drop in total business volume, when in fact the rapidly worsening crisis ensured that the eventual fall would be much greater.

The results from the youth travel sector by global region reflect the initial analysis made by Uğur and Akbıyık (2020), with the biggest March declines being seen in Asia, where the pandemic hit first, followed by Europe. Other world regions were anticipating much less severe downturns at that stage.

As the pandemic unfolded, however, differences in expectations between world regions diminished, with all regions expecting a fall of more than 60% for 2020 by July. By September the worst hit businesses were in North America, and particularly the United States, which recorded over 6 million cases by late August 2020.

Figure 1 shows there was some brief optimism over the European summer as the first wave of the pandemic eased and travel restrictions were lifted by some countries. This was quickly quashed as travel restrictions were re-introduced with the onset of the second wave.

Looking at specific tourism sectors, the largest initial decreases were seen in the language travel sector (-34%), followed by activities, tours, and attractions (-32%) and accommodation (-28%). The language travel sector was impacted by a dramatic drop in outbound Chinese travel, as the Chinese market is crucial for many language travel destinations, including the UK, Australia, and Canada. For the educational travel and volunteering and internship programmes the immediate effects were less obvious because of the seasonal nature of much of this business. The expected fall in business over the next 12 months in general reflected the short-term reduction in demand across the different sectors.

The only businesses reporting an upturn in March were in the insurance sector, who reported a 2% average increase in demand during Q1 of 2020. Insurance providers were also optimistic about their prospects for the rest of the calendar year, anticipating, on average, a 5% increase in business volume. There was also some optimism in the early months of the survey among certain sectors that the crisis would pass before the northern summer, and summer camp operators were initially more positive about their prospects.

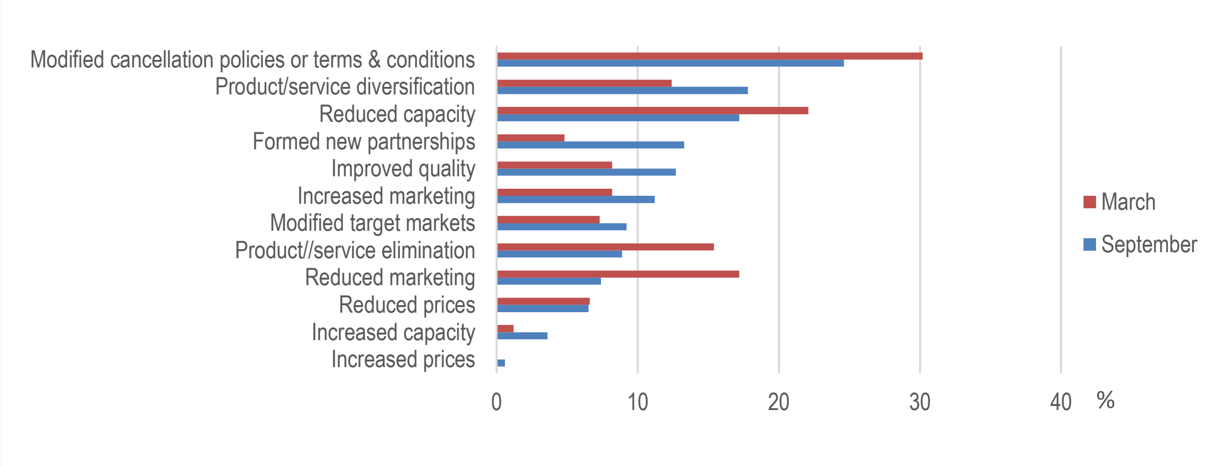
4.1 Strategic and tactical responses to the pandemic

In terms of the reaction of respondents to the crisis, the most frequently reported action was, by far, the modification of cancellation policies (Figure 2). Over 30% of respondents did this in March, and almost 25% were still modifying conditions in September. Other than covering themselves against claims from consumers, youth travel businesses increased their marketing efforts. In particular there was a marked increase in new partnerships, and an emphasis on increasing quality and marketing activity. Not surprisingly a large number of suppliers reduced their capacity to adjust to falling demand.

More strategic actions, such as improving quality, forming new partnerships and adjusting marketing and product offering became more important as the crisis dragged on. In the early days of the crisis some operators reduced their marketing spending as income fell, but over the following months marketing budgets tended to increase in the search for new customers.

With international travel bans in place, many respondents mentioned a shift in marketing to local or regional domestic markets. In the August survey we also asked a specific question about product development for the domestic market. This indicated that the average decline in domestic travel demand in 2020 was 28%, a much lower figure than for the market as a whole (-70%). Over 45% of survey respondents indicated that they had developed new products for domestic customers during the pandemic.

Figure 2: Actions taken in response to the Covid-19 crisis.



Source: own elaboration from the research data.

This was most prevalent for accommodation and attraction operators, who have large investments in physical facilities. The development of domestic travel products had a positive impact on business, with those developing new products expecting 9% more demand for 2020 as a result.

For other sectors there was clear evidence of a digital shift, with products and services being offered online as a result of the pandemic. Respondents indicated that in 2020 about 30% of programmes that normally require travel would be shifted online. This was most notable in the educational travel and language learning sectors, with over 40% of language programmes being offered online in some form. This required investments in new technology to support online learning, but those companies that did invest reported lower reductions in demand than those who did not invest.

Youth travel accommodation in particular has had to adapt radically to the pandemic, because hostels are characterised by the use of dormitories, which typically sleep between 4 and 12 people in one room. Hostels also have significant areas for socialising, and collective kitchens, which arguably set them apart from budget hotels. Implementing social distancing in these facilities has been challenging, particularly as the business model depends on a fairly small floor area per guest. Accommodation operators estimated that social distancing requirements would cause an average capacity reduction of 52%, translating into a 66% drop in revenue. WYSE Travel Confederation estimates indicate that this would lead to a drop in turnover for accommodation businesses of over 22 billion euros in a 12 month period (Morrill and Richards, 2020).

One specific market that attracted increased attention in 2020 was digital nomads. These location independent workers, who previously had been a peripheral element in the youth travel market (Richards, 2015) suddenly became interesting as a new source of demand for destinations and travel industry companies.

Although the initial steps in developing this market had been taken by Estonia through careful market research and the development of a specific digital nomad visa, a number of other countries jumped on the digital nomad bandwagon during 2020. Most notably these included Caribbean destinations such as the Bahamas and Bermuda.

These trends were also reflected in the activities of youth travel suppliers, with over 20% of survey respondents indicating that they were developing new products for digital nomads. Again, the survey indicated that those operators who had invested in attracting digital nomads as a new market segment performed better than those who had not invested.

This review shows that in spite of the global nature of the pandemic and the travel downturn, youth travel companies were able to take actions to mitigate the effects on their business. For many operators these measures were still not sufficient, as many have gone out of business in the past few months, most notably STA Travel, one of the biggest youth travel operators. For those still in business, hope is being pinned on a recovery in 2021, although many respondents indicated they did not think the industry would recover until there is a vaccine widely available.

5 DISCUSSION AND CONCLUSIONS

There is no doubt that Covid-19 has already had a significant impact on global travel. The results of the WYSE survey indicate that businesses in almost all travel sectors and world regions have experienced a downturn in demand, and that they are also expecting this to continue for the foreseeable future. Increasing pessimism during the course of the survey period also indicates that the crisis will continue to deepen, and comparisons with the effects of previous crises (such as SARS) suggests that Covid-19 will have a considerably greater and long-term impact on the travel industry. The negative impacts of Covid-19 are also evident in all sectors of the travel industry and in all world regions.

The pandemic has caused major challenges for the youth tourism industry, not just because of general travel restrictions, but also because of the specific nature of youth travel. Youth travellers primarily want to experience local culture and build social contacts with their hosts and with fellow-travellers, a factor which has supported the popularity of hostel accommodation in recent years. However, this desire for social contact has now become a challenge for the travel industry, particularly as travel itself has been linked to spreading Covid-19 (Farzanegan et al., 2020). The need to social distance in accommodation and at attractions has reduced capacity and revenue for those businesses that continue to operate.

The shift towards online education and experiences has kept some programmes afloat. But there is a limit to how much the experience of youth travel can be shifted online. The most important aspect of educational travel, for example, is the cultural experience of being in another country. Similarly, language programmes, placements and volunteer programmes have been able to shift some activities online, but this is often a poor substitute for live programmes. New markets have emerged, such as domestic travellers and digital nomads, but these have also done little to compensate for closed borders and social distancing measures.

Even if a vaccine becomes available relatively quickly, there will still be considerable knock-on effects from the pandemic. Many tourism businesses have already folded, and others will follow. This means that it will take some time before the capacity lost during the pandemic can be replaced.

There is also the question of whether many destinations will want to return to a pre-pandemic 'normal' form of tourism. The reaction of many destination marketing organisations to crisis has been to follow the widely touted 'response-recovery-resilience' framework, but many people are calling for a more creative model based on lower tourist numbers and more sustainable forms of tourism (Richards, 2020). People have not only become nervous of travelling, but also of receiving travellers. It will take some time before previous levels of mobility and socialisation can be restored.

There will also be growing discussions about the models of tourism that destinations want to adopt in future. In many places this is likely to be a lower-volume, higher spend variant, reversing a decades-long trend of massification and pressure on prices. It may also reverse the 20th century democratisation of travel, making international travel a more upmarket product that the wealthier can afford. If so, this is likely to change the discourse about the 'right to travel', and whether travel should be subsidised for those unable to afford it. In addition to the immediate challenges posed by travel bans, research by WYSE Travel Confederation (2018) has also indicated a growing concern with epidemics, with the proportion of youth travel plans affected by such health issues already doubling from 6% in 2007 to 12% in 2017. These concerns are likely to grow further in future.

Optimists will point to the significant rebounds in travel to Asia following the SARS outbreak in 2003 and the global economic downturn in 2009. But the second wave of Covid-19 has already dashed hope of a quick recovery and given more credence to Henderson and Ng's (2004) warning that "Other unknown viruses are also predicted to emerge in the 21st century, and the prevailing forces of globalisation will facilitate their spread". As they remarked, such events are beyond the control of the tourism industry, "which has few options beyond strict cost cutting, an exhaustive search for and exploitation of revenue-generating possibilities and calls for government aid." Our analysis has indicated that the youth travel industry is capable of more creative responses that can provide some mitigation, but the room for manoeuvre remains small.

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