

Entering the European volunteer and educational tourism market

Last updated:
17 March 2025

Volunteer and educational tourism attracts Europeans who want a meaningful travel experience. The market demands responsible and ethical tourism practices, particularly if you work with vulnerable children and wildlife. As a growing niche, there are numerous opportunities to develop positive relationships with European tour operators that specialise in volunteer and educational tours and trips.

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1. What requirements and certifications must volunteer and educational tourism meet to be allowed on the European market?

The European tour operator market has to comply with several laws to ensure their clients are safe and financially protected. To do business with the European market, you should align your business processes with theirs to meet their expectations. European tour operators expect you to meet conditions they set in their codes of conduct and terms of business. Sustainability in all areas of tourism provision is essential for European tourism suppliers. You should include sustainable actions throughout all your business activities.

What are the mandatory and additional requirements that buyers have?

The requirements for volunteer and educational tourism services are shared throughout the sector. They include:

- The European Package Travel Directive
- General Data Protection Regulation (GDPR)
- Liability Insurance and Insolvency Protection

You can find out more in the CBI study [What requirements must tourism services comply with to be allowed on the European market?](#) This study will help you understand the requirements European tour operators have to comply with. If you understand the requirements they are bound by and can adapt your business to meet their needs, they will be more likely to do business with you. It is important to European buyers that they can trust their suppliers to meet their and their customers' needs.

What are the requirements for niche markets?

Like all current tourism development, volunteer projects have to employ sustainable principles. They should meet a genuine social need and have a positive effect on the environment. Particular care must be taken when

creating projects that involve working with children and wildlife so harmful practices are avoided. Establishing standards and mitigating risk are key requirements too.

Projects must be managed under sustainable principles, and impacts must be measured

Sustainability should be embedded into volunteer projects so that the community and the environment benefit in the long term. In volunteer tourism, sustainability is all about collaborating with local communities and groups to deliver projects that address specific needs and have value in both the short and long term.

Working with relevant partners will help ensure that local environments and communities are more resilient in the future. Well-planned and implemented projects also ensure that volunteers have the experience they want and can become forces for good.

Projects must have a measurable positive impact on the destination. This could be measured by a building being constructed on time and within budget, the necessary number of classes being held successfully, an immunisation programme being successfully completed or something else. The infographic below highlights the key impacts of volunteer tourism projects conducted by Projects Abroad. You can read the whole [Impact Report 2023](#) for more on how they measure the impact of their work.

Figure 1: Impact of Volunteering in 2023, Projects Abroad



Source: Projects Abroad, 2023

Projects should also have a measurable positive impact on volunteers. Techniques for measuring volunteer satisfaction can include post-placement questionnaires that indicate personal fulfilment, successful completion of the placement, completed tasks and completed assessments.

Being certified as a sustainable tourism business is a good idea if you can afford it. Like putting standards in place, it is time-consuming and requires long-term commitment from you, your staff and your partners. Being certified will also give you credibility among your buyers, who will value your commitment to sustainability.

First, research the most suitable sustainability certification schemes, such as [Travelife for Tour Operators](#), [TourCert](#) and [Good Travel Seal](#). They are more affordable than many other schemes on the market. Find out if there are any local schemes in your destination. More countries are developing their own schemes that you could join. [Responsible Tourism Tanzania](#) and Costa Rica's [CST Tourism Sustainability Scheme](#) are two examples of such schemes.

Use the [UN SDGs \(United Nations Sustainable Development Goals\)](#) to track a project's end goals. The SDGs are a set of 17 goals that are an urgent call for action by all countries. The goals include ending poverty, promoting good health and wellbeing, gender equality and climate action. Find out more about the SDGs and [watch the video](#) to help familiarise yourself with them.

The infographic below is an example of how the SDGs can be used to measure the progress of a volunteer project managed by the European tour operator GVI. You can find out more in its [Impact Report 2023](#).

Figure 2: Using the SDGs to measure progress



Tip:

Describe your sustainability actions and how you measure your impact on your website. It is essential to show buyers that you are a responsible local operator if you want to do business with them. You should do this even if you cannot afford to be sustainably certified yet.

Projects must be ethically and responsibly managed under a Code of Conduct

As we saw, the European market potential for volunteer and educational tourism and international volunteering has been criticised for many years. Projects that are badly conceived and poorly managed do little to help the community and cause harm in some instances, meaning European volunteers are more wary of how they volunteer.

Working in orphanages and irresponsible interactions with wildlife have been especially criticised, as have projects that use international volunteers instead of employing local people. As a result, many European tour operators no longer support orphanages or offer voluntary positions in them. Other operators do not place volunteers on short-term placements with children, arguing that vulnerable children get attached to volunteers who then leave.

Exploiting wildlife through excessive human interaction is another issue that has affected volunteer tourism. Today, it is important that wildlife projects conform to best practices and that activities do not harm animal welfare.

The best way to ensure your volunteer projects are ethical and responsible is to create your own code of conduct. You should state your values very clearly on your website.

Figure 3: State your values clearly and simply on your website



Source: Natucate, 2024

Consider the following responsible and ethical guidelines when drawing up your code of conduct and other policies.

- Projects should involve and benefit local people where possible. You should employ local people and be careful not to replace full-time jobs with volunteers. Your European partners will not send you volunteers if there is a clear need for a full-time job.
- Volunteers should be a benefit to the project, not a burden. You should be clear about the skills you need from your volunteers. You should ensure your buyer has the appropriate interviewing systems to secure the right volunteer.
- Responsibility and sustainability. Projects should fit the local way of life and minimally affect the environment, culture and economy. This means that food and supplies should be sourced locally wherever possible.
- Volunteering with children and wildlife. You should have firm policies and clearly state your code of conduct for volunteering with children and wildlife.

- Code of conduct for volunteers. It is important that the volunteers who work on your project follow your code of conduct. It should include topics like working hard with a positive attitude, respecting the culture and host community, being responsible and professional, respecting the environment, using resources wisely, not dropping litter and so on. Take time to read VSO's [Global Code of Conduct](#), which is very detailed and applies to a wide range of people involved with the organisation, including volunteers.

Tips:

Read the policies and philosophies of some leading volunteering operators, such as global operator [Volunteering Solutions](#) and German operator [Natucate](#). Doing your own research will help you draft your code of conduct.

Find out more about the debate surrounding orphanages. [ReThink Orphanages](#) has some useful research and publications about volunteering in orphanages on its website.

Read this example [child protection policy](#) from UK operator Oyster Worldwide. Many European tour operators publish their policies on child protection.

Ensure your wildlife project is managed responsibly. In this article, you will learn what [ethical volunteering with wildlife](#) really means.

Write a code of conduct that you expect volunteers to stick to. [Natucate's code of conduct](#) provides a helpful checklist.

Establish standards and manage risk

Volunteer tourism is considered part of the adventure travel segment. This means it is important that volunteer projects are well-managed and safe. European tour operator buyers will conduct regular risk assessments and safety checks on accommodation and equipment. For many operators, this will be the main consideration when establishing partnerships with suppliers like yourselves.

To help mitigate risks, many operators comply with standards for adventure tourism management as issued by the International Organisation for Standardisation (ISO) or, for UK tour operators, the British Standards Institution (BSI). The two important standards that you should consider complying with are:

- Adventure tourism — Safety management systems — Requirements – [ISO 21101:2014/Amd 1:2024](#)
- British Standard for adventurous activities outside of the United Kingdom – [BS8848:2014](#)

A further ISO standard for consideration provides guidelines for the involvement of spontaneous volunteers in volunteer projects related to disaster relief. You can find out more about this standard, [ISO 22319:2017](#), on the ISO website.

Implementing standards can be expensive and time-consuming. Once you have purchased the standard and implemented the necessary actions, your business will need to be audited. This will have a cost. You should implement safety standards at the very least so you can tell your buyers how you keep your clients safe.

Tips:

Read more about establishing standards for adventure tourism in the CBI study [Entering the European Market for Adventure Tourism](#).

Find out the best way to manage risk for your tourism business. The CBI study [How to manage risks in tourism](#) is a useful guide.

2. Through which channels can you get volunteer and educational products on the European market?

Young people dominate the market for volunteer tourism. However, there is a growing number of older travellers who also want to make a difference when they travel. Specialist tour operators and specialist OTAs are the main channels to the European market. It is a good idea to have a website, too, so your buyers can find you, and you can appeal to FITs (fully independent travellers).

How is the end-market segmented?

The market for volunteer and educational tourism is dominated by young people who want to make a difference in other people's lives, learn new skills, meet new people or take time out from education or employment. In 2023, [travellers aged 18-34 accounted for 41.2% of the volunteer tourism market](#).

A growing number of older travellers (50+) are interested in volunteering overseas. The table below shows how all groups volunteer. Younger age groups are predominantly involved in educational tourism.

Table 1: Volunteer and Educational Tourist Market Segmentation

Segment	Volunteer	Educational
Gap Year Students	✓	✓
Students on School Trips	✓	✓
University Students	✓	
Young Professionals/Career Breakers	✓	
50+/Post-Family Market	✓	

Source: Acorn Tourism Consulting

Tip:

Find out more about the end market in [The European market potential for volunteer and educational tourism](#).

Through which channels does a product end up on the end-market?

The major sales channels for volunteer tourism are specialist tour operators and OTAs (online travel agents). The market is dominated by companies from the UK, with fewer companies in continental Europe. These tour operators are major businesses that operate in the global marketplace and sell to a global market.

Figure 4: Sales channels of volunteer and educational travel products to the European market



Source: Acorn Tourism Consulting, 2024

Be aware that the market is quite dynamic. In many instances, volunteer tour operators also cater for school trips. Operators that primarily sell educational travel products may also cater for gap years. Each channel is further explained below.

European Tour Operators that specialise in volunteer and gap year tourism

These businesses usually operate in several countries and host multiple projects in each country. They are also likely to have at least three long-term projects underway in each country. They invest a lot in their operations and have permanent staff in each destination. This group of operators also includes some general operators that have volunteering as a theme in their core products.

Table 2: Examples of well-established tour operators

Country	European tour operators that specialise in volunteer and gap year travel
The United Kingdom (UK)	African Conservation Experience Gap360 Gapforce GVI Oyster Worldwide Projects Abroad Raleigh International The Great Projects The Leap The Mighty Roar VSO
Germany	AIFS Educational Travel Freiwilligenarbeit Lernen & Helfen Sprachreisen Natucate
France	Routes du Monde ATC Eco-Volontaire Sans Frontieres Vefe Voyages

Netherlands	Kilroy Vrijwillig Wereldwijd
Scandinavia	Voluntärresor Jysk Rejsebureau
Italy	Avventure nel Mondo Volontariato Internazionale

Source: Acorn Tourism Consulting, 2024

OTA platforms that specialise in volunteer tourism

These platforms promote and sell volunteer tourism trips provided by specialist volunteer tour operators (above) or promote projects established by local operators or communities in destinations. Some also offer educational trips and internships. Examples in this specialist group of OTAs include:

- [Guidisto Volontariat](#)
- [GoAbroad](#)
- [Go Overseas](#)
- [One World 365](#)
- [Responsible Travel](#)
- [Volunteer World](#)
- [WWOOF International](#)
- [Working Abroad](#)
- [Worldpackers](#)
- [France Volontaires](#)

European tour operators specialising in providing educational trips for schools and colleges

Schools and colleges that arrange educational trips for their students usually deal directly with networks of specialist operators based in their own country, which then arrange bespoke trips based on the educational establishment's needs. Examples include [Camps International](#), [Rayburn Tours](#) and [Travelbound \(UK\)](#), [RUF Jugendreisen \(Germany\)](#) and [Sejours Educatif \(France\)](#).

Other useful organisations

There are several European organisations that help young Europeans find volunteering opportunities. It is worth looking into them to see if you could make an approach with details of your project.

- [International Cultural Youth Exchange](#)
- [Alliance of European Voluntary Service Organisations](#)
- [Service Civil International](#)

Tip:

Make a database of volunteer and educational tour operators, as they may be your most important buyers. The above lists are a good start. Use the internet to find European tour operators that specialise in the sector. The [Year Out Group](#) lists all its tour operator members. [GoAbroad](#) also lists the operators for the trips featured on its website. Once you have a database, you can consider which

operators most closely match your values.

What is the most interesting channel for you?

Specialist tour operators and specialist OTAs are the most interesting channels for you as a volunteer travel provider.

The most straightforward route to market is via OTAs, as you can usually register your projects online. However, they all have standards that they expect volunteer projects to comply with to ensure they are environmentally and ethically sound and will benefit both tourists and host countries. When you visit their websites, look for links that say something like 'Become a Host'.

Figure 5: Get listed with specialist volunteer OTAs like Worldpackers



Source: Worldpackers, 2024

Getting projects adopted by specialist tour operators has many benefits, as the operators will use their resources and marketing skills to promote the projects. They will also take responsibility for their travelling clients, although you will need to look after them well.

The key questions a volunteer tour operator will need positive answers to before moving into a destination are given below.

- Will travellers want to visit the destination – is it appealing?
- Are volunteers likely to want to do the work you need them to do?
- Can safety and security be assured?
- Is there a sufficient stock of appropriate accommodation?
- If they do not already work there, is there scope for at least three separate projects in the destination to make the investment worthwhile?

Identify which questions you can answer 'yes' to. Work out what you need to do to say 'yes' to the rest. To help, research other volunteer projects in your destination and learn from them.

You should also have a website. European tour operators value professionalism and may use your website to make decisions about your volunteer projects. You can use your website to make direct sales. Volunteers who buy directly from your website are likely to be FITs who make their own plans. They will not be able to find you unless you have an online presence.

Tips:

Find out what you need to do to work with OTAs. Use the CBI study [How to work effectively with OTAs](#) to help you.

Prepare to work with European tour operators. Consult the CBI guides [Tips for finding buyers on the European tourism market](#), [Tips for doing business with European tourism buyers](#) and [What are the requirements for tourism services in the European market?](#)

Build a website. If you already have one, analyse it thoroughly to ensure it attracts volunteers. Pay

attention to details of the project, the impact it has on the environment and the communities it supports and sustainability. Use the CBI study [How to be a successful tourism company online](#). It has lots of tips to help.

3. What competition do you face on the European volunteer and educational tourism market?

Volunteering opportunities are found in countries all over the world. Developing destinations are especially popular for volunteering. Educational trips are also conducted worldwide, and destinations depend upon the purpose of the trip, whether learning a language or appreciating the culture. As it is a growing industry, the volunteer and educational tourism sector is very competitive.

Which countries are you competing with?

The main countries you will be competing with are South Africa, India, Nepal and Peru. However, there are many more you can also consider as competition. These include Ghana, Ecuador, Kenya, Costa Rica, Thailand and Tanzania.

South Africa

South Africa is the continent's leading destination for volunteer and educational tourism. Typical activities include volunteer placements, internships, teaching English and sports coaching. It is a popular destination for school sports trips as part of educational curricula. Its many national parks, such as Kruger National Park, are also particularly popular for wildlife conservation.

Despite rapid development over the last 20 years, many conservation, social and community development issues persist. This creates a lot of opportunities for this type of tourism. Cities like Johannesburg and Cape Town have many opportunities. Programmes in rural locations promote cultural immersion by encouraging tourists to learn about local traditions, languages and customs. Other opportunities include conservation, childcare, teaching and healthcare.

Figure 6: Sports coaching is popular among European volunteers



Source: Acorn Tourism Consulting, 2024

India

Volunteer programmes in India are related to education, healthcare, women's empowerment and animal welfare. As a huge country with 29 different states and 26 official languages, experiences are incredibly varied. Popular locations for volunteering include India's capital city, Delhi, Kerala in southern India and Jaipur in Rajasthan.

While the country is developing rapidly, many communities lack access to clean water, proper housing and basic medical care. Projects that focus on medical care are widespread in India, such as helping in busy clinics in low-income areas and mobile clinics.

Nepal

Nepal has long been a destination for volunteering projects, particularly around community development. Examples include building local libraries, supporting literacy projects for children and adults and teaching computer classes in rural villages. Following the [devastating earthquake in 2015](#) that killed almost 9,000 people, volunteers helped provide disaster relief to help rebuild holy sites and schools.

Peru

Peru is a good destination for environmental conservation. Lima, Cusco and Huancayo are popular cities where people can volunteer. Working with indigenous communities and conducting research in the Amazon are typical projects. Data collection and surveying for environmental and conservation projects are also widespread and can be done as part of specific educational projects. Volunteering to help keep children off the streets in Lima is another popular choice for volunteers.

Key takeaways:

- Find out what volunteering opportunities there are in your destination and where they are located. Learn what the most popular volunteering options are.
- Identify local volunteering organisations and assess what they do. Find out key points you can learn from them.
- See if you can find out how they sell their products. This could be through specialist European tour operators or OTAs. All this competitive information will be useful in developing your own projects.

Which companies are you competing with?

Volunteer and educational tourism is well-established at the local level in the main competing countries and elsewhere. They often use Destination Management Companies (DMCs) to promote their volunteer opportunities to outbound tour operators by partnering with local DMCs.

Companies in South Africa

Over the past ten years, [Volunteer South Africa](#) has established partnerships with various responsible and ethical animal conservation and social development programmes across South Africa. Its tours promote wildlife rehabilitation and care, wildlife conservation and horseback safari riding. Volunteer South Africa is very clear about what volunteers can expect from its services.

Figure 7: What volunteers can expect from Volunteer South Africa



Source: Volunteer South Africa, 2024

It also highlights its commitments to volunteers, such as regularly visiting each programme to ensure they deliver high standards and checking the volunteers enjoy themselves. The organisation is partnered with Care for Wild, the largest rhino orphanage in the world, and it is a member of the [SATSA \(Southern Africa Tourism Services Association\)](#).

[African Impact](#) is a sustainable volunteer travel organisation that operates and manages its projects with experienced staff, but it never uses volunteers as replacements for local people. It also offers internships and opportunities to study abroad. The volunteering projects are focused on community and conservation. Specific

groups and expeditions can also be catered for. It has projects in several African destinations, including Tanzania, Zambia, Zimbabwe, Mozambique and Namibia.

In 2023, it won Outstanding Contribution to the SDGs in the Global Youth Awards. [GoAbroad](#) has also commended the operator for innovation in sustainability, marketing and digital media. See how [African Impact supports the SDGs](#).

Companies in India

Based in Rajasthan, [Volunteering With India](#) offers a combination of volunteering projects and adventure travel experiences in several areas. The projects include working with disadvantaged women, childcare, health programmes for sick and terminal patients and teaching projects alongside theatre workshops and elephant care. The organisation supports local NGOs (non-governmental organisations) in urban and rural areas. It offers 'add-on tour packages' after the volunteering elements are finished. These range from two nights/three days to six nights/days.

The company [actively seeks outbound tour operators for new partnerships](#) and has partnered with the OTAs OneWorld 365 and GoAbroad. Its website is available in several languages other than English, including German, French, Spanish and Italian.

[Ecosphere Spiti](#) in Himachal Pradesh is a social enterprise that focuses on creating sustainable livelihoods linked to nature and culture conservation. It offers opportunities to help local communities that live in the high-altitude Himalayan region. Volunteers get involved in projects that include building greenhouses and volunteering in local villages, getting fully immersed in their daily routines. Volunteering is usually between May and October, as this is the best time to visit the region. Accommodation is provided by local families.

Companies in Nepal

[Volunteer Society Nepal](#) is a local organisation that offers volunteering opportunities and internships in childcare, special needs, women's groups, teaching, medical care and construction. Its projects are located country-wide, in Kathmandu and throughout the Himalayas. It targets international volunteers directly. It also offers volunteers activities like yoga and treks to one of Mount Everest's base camps. The organisation has a [transparent pricing system](#), which explains exactly how volunteers' fees are allocated.

[Volunteers Initiative Nepal](#) is an NGO based in Kathmandu. It works with rural communities and is committed to the empowerment of marginalised communities. Its development approach is spread across six major programmes related to women's empowerment, children's development, youth empowerment, public health and medical services, environment conservation and disaster risk reduction. These all align with the UN's Sustainable Development Goals (SDGs). The application process is a simple three-stage process, and volunteers apply online.

See how this operator reports its programme's impacts. Volunteers are inspired to contribute if they can see how they are making a difference.

Figure 8: Example of impact measuring of a volunteer project



Source: Volunteers Initiative Nepal, 2024

Companies in Peru

Based in Cusco, [Peru Volunteer](#) offers volunteers the opportunity to learn Spanish with formal classes while volunteering. Its trips are typically four, eight or 12 weeks. In terms of accommodation, travellers can choose

between a homestay or volunteer house. All volunteer projects are in and around Cusco, accessible by public transport and related to teaching English, sports, preschool, special needs and animal welfare. Volunteers can get involved in different projects across two daily sessions.

The company has established partnerships with German operator Friewilligenarbeit and OTA GoAbroad. Its website is available in multiple languages.

[Proyecto Peru](#) is based in Cusco and partners. It offers volunteer projects in the local area. Participants can volunteer at no cost if they take a Spanish course or stay in the organisation's homestay accommodation. The operator clarifies that volunteering is not a means to make money; a one-off \$50 (USD) fee goes directly to the community. Projects are in the fields of education and youth development, medicine, culture and history, animal welfare and environmental volunteering.

The organisation also offers internship placements in medical, education, social work, animal care, marketing and communication.

Key takeaways:

- Build or improve your website. Your buyers will use your website to learn about you and your projects. If you do not have one, they will have to work harder to find out about your work, and they may not bother. There may be lots of other companies on the market that are easier to find out about.
- Identify DMCs in your destination and see if you can partner with them.
- Keep in contact with your tourist board to see what sort of mutually beneficial relationship you can establish with them. Perhaps you can put a link on your website in return for one on theirs. Or perhaps they have a directory of local tour operators you could be listed on.
- Align your impact with the SDGs. This will transparently tell your buyers exactly how you are a sustainable business.

Which products are you competing with?

The main competition for volunteer tourism is adventure tourism. The two segments are closely linked, and volunteers often go on to travel independently after they have volunteered. Including an adventure element in your volunteer experience will appeal to those who want to do both and allow them to arrange the two conveniently.

Look at this example: [a two to three-week Volunteer Jungle Safari and Pokhara Tour](#). The local volunteer operator collaborated with a local travel agency to provide the adventure part of this trip. Many European tour operators include adventure elements in their tours for young volunteers.

4. What are the prices of volunteer and educational tourism on the European market?

Volunteer and educational trips can be expensive. Although participants give their time and skills to a volunteer project for free, there are substantial costs to the tour operators who put the trips together as they generally make all the arrangements. These include transportation, local travel, medical insurance, induction, training, orientation, accommodation and meals.

Tour operators may need to provide a high level of care for volunteers, as many of them will be young or inexperienced travellers. As a result, it is important that parents (who may be paying for the trip) are reassured their children are safe while under the operators' care. Providing this level of care is often costly as staff must

have the appropriate personnel and management skills, and marketing and informational materials must be detailed and plentiful.

School trips are usually tailored trips and priced according to the group's needs.

The chart below shows how Volunteering with India breaks down the costs paid by the volunteer throughout the cost categories.

Source: [Volunteering with India](#), 2024

Service levels can and do vary from operator to operator, and there is a wide range of prices for similar experiences on the market, as shown in the table below. It is clear that conservation in Africa is the most expensive volunteering option. However, it is important to remember that the choice of destination will also affect the price of trips, and there is no standard.

Table 3: Examples of volunteer travel products on the market, September 2024

Operator	Country	Details	Duration	Price per week from (€)
Spiti Ecosphere	India	Journeys for Climate Action	1 week	290
Volunteering with India	India	Volunteer with Street Children	1 week +	320
Volunteering with India	India	Teaching Volunteer Programme	1 week +	320
Volunteers Initiative Nepal	Nepal	Environment Conservation Programme (minimum 2 weeks)	2 weeks	175
Volunteers Initiative Nepal	Nepal	Children Development Programme (minimum 2 weeks)	2 weeks	175
Volunteer Society Nepal	Nepal	Teaching in a Monastery (minimum 2 weeks)	2 weeks	250

Volunteer Society Nepal	Nepal	Music Therapy Volunteering (minimum 2 weeks)	2 weeks	250
African Impact	Kenya	Medical and Nursing Internship	4 weeks +	530
Volunteer Southern Africa	South Africa	Cheetah Conservation	1-12 weeks	1,090
African Impact	Zanzibar	Dolphin Conservation Volunteer	10 days +	1,190
Volunteer Southern Africa	South Africa	Living with Orphaned Rhinos at Care for Wild	1-12 weeks	1,670

Source: Acorn Tourism Consulting, 2024

Tips:

When setting your prices, research what your competitors charge for similar products. Only set higher prices if you believe you offer better service. Read [Tips for Doing Business with European Tourism Buyers](#) for more information about setting prices.

Do your own research into SAVE trips currently on the market and see how they are priced. Consult the [Year Out Group](#) for a list of approved operators and see how their prices compare. Although they are predominantly British companies, they operate globally, and many of them have European clients.

Acorn Tourism Consulting Limited carried out this study on behalf of CBI.

Please review our [market information disclaimer](#).