

Winner Takes All: The Challenges and Opportunities in the Study Tour Industry in China after the Epidemic

Cheng Longyue¹, Nor Akmar Abdul Aziz¹, Evelyn Lim Ai Lin¹,
Yu Liya²

¹Faculty of Forestry and Environment, Universiti Putra Malaysia, 43400 UPM Serdang Selangor Malaysia, ²Institute for Social Science Studies, Universiti Putra Malaysia, 43400 UPM Serdang Selangor Malaysia

Corresponding Author Email: GS65319@student.upm.edu.my

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Abstract

As a branch of educational tourism, study tours continue to develop globally, and China has also begun to encourage the development of study tours since 2016. This emerging market has attracted tourism companies seeking new business opportunities, tourism companies have perceived study tours as a new industry opportunity. However, the anticipated profitability of study tours has not always materialized. This research investigates the current state of the study tour market in China, focusing on corporate profitability and tourism safety issues. The study reveals that while a few companies manage to achieve profitability, most struggle to break even. Key challenges include high operational costs, regulatory hurdles, and safety concerns. The findings suggest that the market operates on a "winner takes all" principle, where only a small number of firms succeed, raising questions about the long-term sustainability and attractiveness of the study tour business in China.

Keywords: Study Tours, Corporate Profitability, Tourism Safety, Industry Challenges

Introduction

Study tours are a branch of educational travel. Study tours are a special form of tourism that combines education and tourism experiences. In China, study tours are mainly targeted at primary school students and middle school students by organizing field trips, practical activities, and cultural exchanges. Enhance their understanding of textbook knowledge, and improve their skills and overall quality. Most of the destinations visited for study tours are historical or cultural sites, science and technology museums, natural attractions, etc.

As the Chinese tourism management department passed the national standard for study tours in 2016, more and more tourism companies have joined in the business activities of

designing and organizing study tours. Many travel agencies believe that study tours are a good business, especially After experiencing the COVID-19 epidemic, many travel agencies have established study tour departments and have begun to focus on creating recommended study tour products. But is study tour really a good business? This can be a sweet trap.

Literature Review and Analyze Model

Literature Review

Historically, study tours have an early development in China and the West, the origins of study tour can be traced back to ancient civilizations. From Confucius's travels around the world in China to Aristotle's wandering life in the Europe, these can all be regarded as the prototypes of study tour, although they are more passive departures from the original place of residence than active educational tourism (Li & Liang, 2020). However, from the 17th to the 19th century, the study tours of British aristocratic children to the European continent marked the initial formation of study tours in the modern sense (Ansell, 2019). With the passage of time, study tours are no longer limited to aristocratic children in the UK. Large-scale study tours organized by schools have begun to appear in the UK, enriching classroom teaching content through study tours to history, geography, natural sciences (Black, 2018). While also providing students with practical opportunities. In the 20th century, this method spread to the United States and Germany, and formed its own characteristics of study tours, such as the Boy Scouts in the United States and nature education in Germany (Champine et al., 2016). In modern times, Asian countries represented by Japan began to organize study tours in teaching to cultivate students' comprehensive abilities (Zhao, 2020). These historical events laid an important foundation for the development of today's study tours, and also reflected mankind's continuous pursuit of knowledge inheritance and experiential learning.

Entering the 21st century, China is experiencing a period of rapid economic development. During summer or winter vacation, it has become mainstream for parents to send their children to summer and winter camps. Students also broaden their horizons and get exercise in these activities (Chen & Xie, 2020). This phenomenon continued until 2016, when the country promulgated study tour standards, and study tour has been further standardized and promoted. From the national level to regional governments, schools are encouraged to organize study tours, conduct study tour camp (base) certification recommendations, promote qualified travel agencies to arrange study tours, carry out study instructor training, and recommend study tour products itineraries (Chen & Mei, 2017). The government has also issued policies and measures to improve the quality of education and study tours, expand students' horizons, and promote local economic development, demonstrating the country's emphasis on and support for study tours.

Porter's Five Forces model of study tour

Porter's Five Forces model is a strategic tool used to analyze the competitive environment of an industry. For the study tour industry, this model can help identify the forces that shape the industry's structure and competition.

First, the study tour industry is characterized by high competition among numerous travel companies and educational institutions. The product offerings are often similar, with many companies providing comparable tour packages and destinations. There is limited differentiation as the core components of study tours destinations and study tours

educational content are often identical. This lack of uniqueness increases the intensity of competition. Although the concept of study tours is relatively new, the market has matured quickly due to the rapid entry of numerous competitors, intensifying rivalry.

Secondly, the barriers to entry in the study tour industry are low. Initial capital requirements, branding, and professionalism are not significant obstacles, making it easy for new players to enter the market. The steady influx of new tourism organizations into the industry is driven by the attractiveness of the study tour market. Many companies are drawn by the potential for gaining market share, despite the high competition. Moreover, the substitutability of study tours is high due to the availability of different types of destinations that offer similar educational experiences. Alternative educational travel programs or traditional educational methods can also serve as substitutes. Consumers, especially parents and schools, have many alternative options, making it easy for them to switch between different study tour providers.

At last, the primary buyers of study tour are parents, but the decision-making power often lies with schools, which act as intermediaries. Schools play a critical role in selecting destinations and providers. Travel companies have low pricing power since schools and parents seek the best value, which often pressures providers to offer competitive pricing. Travel agencies act as intermediaries and do not control core resources such as educational content, accommodation, and transportation. This lack of control limits their bargaining power with suppliers. Since travel agencies rely on multiple suppliers, such as hotels and transport, for various components of the study tour, their ability to negotiate favorable terms is restricted. Porter's five forces analysis model of study tours, as shown in the figure.

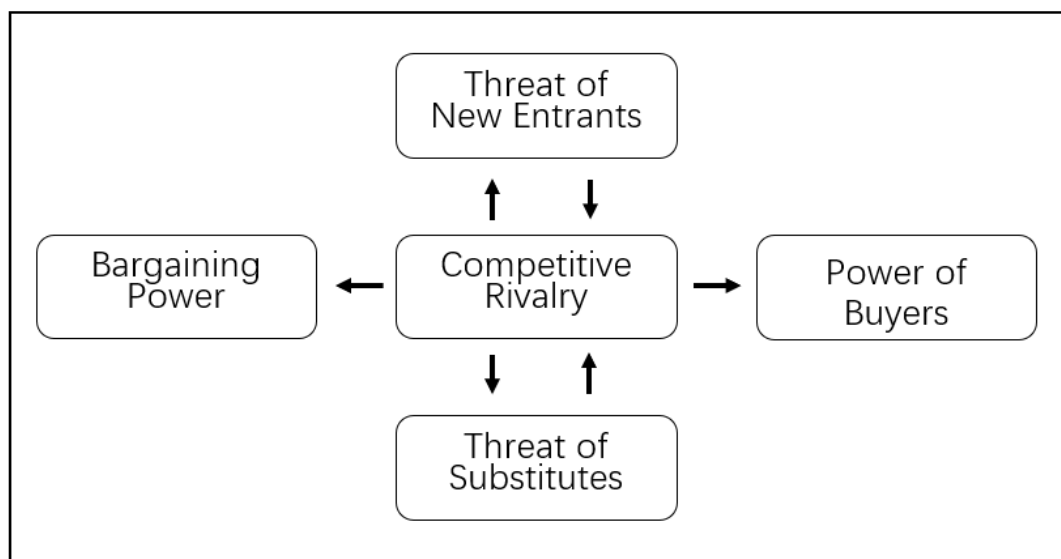


Figure 2.1 Porter's Five Forces model of study tour

As shown in the figure, competitive rivalry in the study tour industry is at the center and is influenced by the other four forces. The threat of new entrants and the threat of substitutes exert pressure from the top and bottom, respectively. The bargaining power of suppliers and the bargaining power of buyers affect both sides, thereby impacting intra-industry competition at the center. This illustrates the fierce competitive environment in the study tour industry and the significant challenges faced by companies. To achieve effective profitability, companies need to strengthen differentiation strategies, manage and control

costs, and establish strong partnerships to compete successfully in the current market environment.

Business Paradoxes and Traps in Study Tour Diverse but Illusory Opportunities

As a new form and opportunity, study tours not bring profit opportunities to travel agencies, it also exacerbates the operating difficulties of travel agencies (Qu, 2019). After the epidemic, the traditional group trip business of travel agencies has suffered setbacks in many aspects, and it is urgent to find new business growth opportunities. With the reduction of traditional tourist and conference teams of travel agencies, many travel agencies are facing operational difficulties (Zhang & Yang, 2022). In order to find new business growth points, many travel agencies have begun to turn their attention to the field of study tours, believing that study tour is a potential growth opportunity of the business.

According to the national study tour standards, travel agencies have designed study tour products and invested specialized personnel in route inspection, itinerary design and product promotion (Liu & Chen, 2020). However, despite the emergence of various study tour products and destinations, only a few products have gained market recognition, and most of them have been left unattended or idle for a long time, or even at a loss. This has further aggravated the operating difficulties of travel agencies, causing many travel agencies to make ends meet, and those who were originally working in the industry had to change careers.

There are obvious differences between study tour products and traditional tourist route products (Xie & Zhang, 2021). First of all, study tour products need to be personalized and customized according to different schools and student age requirements, and repeated multi-faceted communication with the school makes the initial contact time between the two parties long and the time cost high. Secondly, in the product design process, study tour products need to consider the matching of students' course content and travel itineraries. This feature leads to the design of study tour products that require many dimensions to be considered. The design cycle is long and the study manual must be provided. It is basically a one-time use product and lacks repeatability and replicability. Finally, during the execution of study tour products, the operation of study tour products is more complex than that of general tourism products, requiring more personnel to be arranged for preparation and operation execution. Therefore, compared with traditional tourism products, study tour products have increased time, economic and labor costs in many aspects, making their comprehensive costs always higher.

Study tour products are greatly affected by cyclicity and seasonality, and uneven peak and peak seasons ultimately lead to low profitability (Liu & Zhou, 2020). From a seasonal perspective, spring and autumn are relatively the best times for study tour. However, now that schools are faced with teaching tasks and pressure, they rarely organize large-scale outings for students during school hours. In winter, due to the cold weather, except for specific ice and snow events, in addition, other projects are not suitable for arranging study tour. Therefore, a large number of study tour are concentrated in the three months from June to August, which leads to a concentrated explosion of demand and a serious run-on resource. Tourism companies need to invest a lot of resources in order to cope with the peak season, but the income generated by their investment is often difficult to cover the off-season and

low demand. The long-term operating costs have resulted in a large number of study tour products that do not last long, and only a few can bring stable profits in the long term.

Study tour products are also highly dependent on government policies and market feedback, and may be suspended if there are negative factors (Li, 2017). As a branch of the traditional tourism concept, study tour products only account for a small share of the overall tourism market. The rise of study tour is also a result of the national policy to encourage schools to bring together knowledge and action, allowing students to go out and understand society and truly combine knowledge with practice. Therefore, in the current development process of study tour, policy encouragement can be regarded as the most direct promoter. However, in the implementation process of study tours, the first thing that schools and governments consider is whether there are potential risks that may be caused by negative factors, such as weather, traffic, sanitation, human factors and other factors. Whether there are potential dangers and whether they will lead to safety accidents. Once problems arise, the policy will urgently halt or postpone all plans. This is like the sword of Damocles hanging over our heads, with great uncertainty. This uncertainty in determining policy results in high volatility and therefore weaker long-term sustainability and profitability.

Therefore, the study tour, which seem to be new opportunities for travel agencies, not only fail to bring opportunities to travel agencies, but also exacerbate the difficulties of travel agencies. The complex design and operational characteristics of study tour have led to high costs and low market recognition, which in turn has exacerbated the operating difficulties of travel agencies. Therefore, travel agencies need to carefully evaluate the commercial viability of study tour products and find more suitable business development paths to cope with current challenges.

Dilemma in Study Tour Camp Development

Competition among study tour camp (base) is fierce, and it is difficult for the study brand to develop in the long term (Chen, 2017). Different types of scenic spots want to seize the opportunity of study tour development and have begun to list different levels of study tour camp (base) (Ma et al., 2019). However, the study tour camp (base) that can achieve profitability and sustainable development are already well-known scenic spots. The unknown scenic spots. There has not been a long-term stable increase in the number of tourists due to the development of study tours.

According to the national study tour standards, tourist destinations must carry out study tour receptions and need to carry out adaptive transformation and evaluation of study tour camp (base). In order to have study tour products and pass the evaluation review, tourist destinations must carry out relevant transformation and investment in construction. These investments including comprehensive environmental improvement of hardware, camp planning and renovation, improvement of facilities and equipment. It also includes software personnel training and reception system upgrades. Therefore, before study tour students visit, tourist destinations have already spent relevant investment, but whether they can achieve output is still unknown. For well-known scenic spots with a large tourist base, the cost of upgrading and renovating for study tour camp (base) is almost insignificant. However, for many small and medium-sized scenic spots, the cost of upgrading study tour camp (base) is a significant expense. The initial investment was unable to produce effective results, and many

small and medium-sized scenic renovation facilities and equipment were idle and did not play their due role after the evaluated for study tour camp (base) (Yuan et al., 2019).

Not only hardware investment, but also software investment, the study tour courses developed by study tour camp (base) have been largely shelved because the scenic spots do not understand the education syllabus and subject settings, so there are many jobs of study tour courses design that require professional education backgrounds. The scenic spot staff is not competent, and the designed products cannot truly achieve the learning goals of the study tour (Li & Ji, 2018). A lot of study tour courses content is mainly experiential, allowing students to understand some knowledge. However, there is no special focus on whether this knowledge meets the needs of students of the corresponding age group. For study tour camp (base), a basic set of study courses covers all age group students, and no separate modifications will be made specifically for students of different age groups.

In addition, from the perspective of parents, allowing students to participate in study tour is more about feelings and experiences. Most study tour products are more like completing an additional task while traveling. They are very limited in their ability to truly integrate with what students have learned and have a real impact on students. More parents and students regard study tour as a unique experience that is more than just traveling. They think that the essence is still to go out and play, and they just learn something during the play, but they don't know exactly what they learn (Shen et al., 2020). Even if there are clear plans and arrangements listed in the study goals, after a period of time, these contents are forgotten by most students, leaving only the trip itself. Therefore, for most study tours, they only arouse students' interest in some aspects, but do not allow students to obtain additional textbook knowledge or absorb textbook knowledge during the study tour. This resulted in a complete disconnect between study tour products and textbook requirements.

Study tour camp (base) want to build a study tour brand through study tour products promotion, but there are few successful cases. Most study tour camp (base) first need to be famous, and then add the promotion and marketing packaging elements of study tour to increase the awareness of students in the tourist market. There are currently no successful cases of a study tour camp (base) becoming a famous and success tourist destination by construct the study tour camp (base) itself.

Unsustainability of Study Tour Products

Study tour products are uneven and falsely packaged, which cannot support product recycling (Li, 2018). Among the various current study tour products, there are varying degrees of design flaws in design, resulting in uneven experience levels of various study tour products (Zhong et al., 2019). The evaluation of the quality of study tour products is the key to affecting student experience and parent satisfaction, and affecting the long-term implementation of study tours. In the design of various study tour products in the current market, many products have the problem of serious disconnection between study projects and what students learn. Although students participate in study tours, the content required during the study tour basically has nothing to do with the textbook syllabus. More it is an interest-based explanation and has basically nothing to do with actual learning needs. It cannot truly obtain a learning experience that meets the teaching and education goals, so the actual effect is not enough.

Most study tour products lack scientific and reasonable teaching content design guidelines. A set of content is applied regardless of all the age of the students. It is too simple for older students, and too complex for younger students, and cannot give full educational effect from the study tour (Ma & Liu, 2020). In addition, when travel agencies provide study tour products and services, most of the study tour instructors arranged by travel agencies are freshly graduated college students, who do not have the teaching ability or team leadership coordination ability or crisis problem handling ability. Therefore, the overall study tour quality varies greatly. Moreover, most study tour products come from travel agency summer camps and tourism products. Their core essence is still focused on tourism and cannot truly achieve the goal of learning while traveling, so students and parents have a poor experience. However, some study tour camps (bases) are unable to meet student experience and smooth activities due to limited funds and manpower, aging and damaged equipment.

Finally, whether it is a study tour camp (base) or study tour product designer or travel agencies, they lack long-term and professional education and teaching experience teams to provide service and knowledge support. Therefore, the quality of study tour products is worrying. Travel agencies and study tour camps (bases) are good at tour services and reception, but basically not education and teaching experience (Chen, 2017). All these have led to a large number of study tour products that focus on travel, experience, and knowledge without syllabus, and the level is uneven. There are a large number of such products in the market, resulting in a poor reputation for experience of the study tour.

A large number of false exaggerations and vague concepts and other promotional behaviors exist in current study tour products, which makes study tour products face the problem of false and excessive packaging (Shen, 2020). In order to attract parents and students to purchase study tour products, it is very common to use exaggerated publicity methods. For example, they emphasize the teaching strength of the study tour instructors, their own experience and abilities, and the experiences students can gain after participating.

As for the defects or problems in the study tour products themselves, travel agencies often hide them and do not immediately or directly inform students or parents of certain problems and deficiencies in the study tour products. They choose to muddle through as long as they are not discovered. And even if a problem is discovered, excuses such as force majeure or other methods have often been made (Li, 2022). In the end the parents and students spent money but did not receive the corresponding service and experience from the study tour products.

Another common method of hiding and exaggerating is to forge or provide false study tour certificates and teacher qualification certificates. Many study tour products are often sold under the banner of some kind of official recognition. After participating, a certificate is often provided to prove the effectiveness of the activity. However, most of the so-called certificates are just a piece of waste paper in the end, or a way to satisfy the guests' psychological emotions. And many people who have no actual education and teaching experience are packaged as various study tour instructors or research professionals to provide so-called professional guidance to students. These problems of misleading consumers and concealing the actual situation are common in many study tour products. This not only affects users' early decision-making and process experience, but also affects subsequent evaluations, which

leads to untrue and false stereotypes from the people on the study tour industry, thus affecting the sustainable development of the study tour market (Yu et al., 2017).

The management and operation level of the study tour is not high, and the educational value is lacking in effectiveness, so that study tour products always have the problem of single design and lack of update and innovation. Travel agencies and tourist destination operations are an intermediary service business with relatively low knowledge entry barriers. The cultural level of the industry employees is always low, and management is relatively extensive and inefficient. Therefore, when facing study tour products with higher knowledge requirements, there will be mismatch in abilities. This problem is concentrated in the operation and management of study tour products, and is also reflected in the innovation and continuous update and improvement of study tour products design. Study tour products design has long been single and stereotyped, lacking differentiation and individuality. The product lacks educational significance, cannot synchronize education and teaching needs, and cannot meet students' learning needs and goals. Ultimately, these products cannot be sustainable in the long term and cannot be recycling use (Wang, 2023). Therefore, it seems that there are many study tour products in the market, but there are very few study tour products that can ultimately produce benefits and achieve sustainable and circular development.

Follow-up Special Attention: Who is Responsible for Security in Study Tour?

The issue of study tour safety is always an unavoidable topic, and no one is willing to take responsibility for safety (Zhong & Tan, 2018). The most critical factor that restricts the development of study tour in China is the issue of who takes responsibility after a safety accident (Zhang & Guo, 2020). In modern society, despite the comprehensive insurance and anti-risk measures, the safety issue of study tour has always been a topic that all parties involved in the study tour are afraid of.

During the study tour, if the students only get minor injuries and little problems that can be easily solved, but if death or serious injury occurs, or even multiple people are injured, it will immediately evolve into a public safety incident, which will be subject to the supervision of the whole society. During the exposure process, all kinds of netizens will use a magnifying glass to search every party involved in the study tour, from school leaders to teachers and study tour instructors, to every person in charge of the travel agency or teaching institution hosting the study tour, every party involved in the incident at the study tour camps (bases). Anyone with a slight flaw will be wirelessly amplified. Regardless of whether it has anything to do with the problem itself, it will be regarded as a stain on the person involved, and it will be judged to be directly or indirectly responsible for the safety accident. This leads to the fact that even if there is no problem in the end, it will be said to be a problem. Because once a safety incident occurs, the school as the organizer, travel agencies and educational institutions as the undertakers, and the teachers or instructors involved will bear great pressure from public opinion (Li & Guo, 2017).

In the current public opinion atmosphere of China's social media, once a safety problem occurs, regardless of whether there are mistakes in the operation process and whether you are responsible or not, in the end you are the responsibility bearer and need to be responsible for the matter. As a result, travel agencies and study tour camp (base) are more willing to organize study tours as long as safety procedures are permitted due to their commercial

perspective and ability to transfer risks to insurance company. These two parts hopes to develop study tour from a business consider. But fundamentally, as schools' management and teachers who should be the most active in study tours, are unwilling to organize study tours and conduct study tour products.

The school's core consideration is safety and allowing students to complete their studies. Such a closed environment on campus is the safest and most controllable. Once outside the campus to go to study tour, the increase in risk factors, as well as sudden changes in unexpected or uncontrollable factors, make the school lose its ability to control and become the main responsibility bearer if problems arise. Rather than doing something and possibly not getting good results, it's better to do nothing and at least there won't be bad results (Liu & Zeng, 2018).

Conclusion

Through the four aspects of the current problems existing in the study tour market, the business status of study tour in the Chinese market is analyzed, revealing the problems and paradoxes it faces in the commercialization process although it seems to be full of opportunities. Although study tour, as an emerging model combining education and tourism, has broad development prospects and potential market demand, there are complex challenges and highly competitive pressure in its actual operation. By applying Porter's five forces model, the competitive situation of the study tour industry was systematically analyzed and the following conclusions were drawn.

First, fierce competition among existing competitors has resulted in the compression of market profit margins. Due to the relatively low entry barriers, many tourism companies have flocked in, intensifying the market competition. In order to attract customers, companies have to adopt price wars and differentiation strategies, but this also makes companies face higher operating costs and profitability pressure.

Secondly, the threat of potential entrants cannot be ignored. As a rapidly growing industry, study tour has attracted a large number of new entrants, which have brought more innovation and resources, but also increased market uncertainty and competitive pressure. Although there are certain barriers to entry, the brand building and initial investment of study tour are not significant, and the threat of new entrants is always present.

Finally, the existence of substitutes poses a significant threat to the study tour industry. Different forms of substitutes have diverted the study tour customer base to a certain extent. The bargaining power of suppliers and buyers in the market is significantly higher than that of tourism companies. Therefore, despite the huge market potential, companies need to make greater efforts in market positioning, product innovation, cost control and customer relationship management in order to achieve sustainable development and profitability. It is a hard work. At the same time, companies need to actively respond to market competition and changes in the external environment. Only by improving their own competitiveness and optimizing their operating models can they find a way to stand out in the fierce market.

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