

Student Group Travel Survey Results

June 2022

1. Introduction

The responses to the following findings are based on a survey of 235 European youth group travel operators who send groups of children under the age of 18 to the UK for periods of up to six weeks in order for the students to attend English Language Schools, undertake school trips or to take part in cultural and sporting events. There are 1.2m EU students that visit the UK each year as a member of this type of group and collectively they spend £1.0bn in the UK economy.

The 235 operators that took part in the survey account for 524,000 student visitors, which is 44% of the total number of students travelling to the UK as part of a group led by a teacher or supervisor. The survey results are therefore an accurate representation of the decline in this market, the cause of the decline and its impact on the UK economy.

2. The Current Status of The Market

In 2019, the 235 agents that responded to the survey sent a total of 1.65m students on educational and cultural trips to UK and European destinations as part of organised groups. Of these, 524,000 students (32%) were sent to the UK, while 82,000 were sent to other English Language EU countries (Ireland and Malta) and 1.0m were sent to other EU countries.

In 2022, they are expecting to send a total of 806,000 school students to EU and the UK. Of these, only 82,000 are being sent to the UK, while 58,000 are going to Ireland and Malta and 676,000 will be sent to other EU countries.

As such, there is an 84% decline in students being sent to the UK in 2022, compared to just a 32% decline in students going to non-English EU countries and a 29% fall in students going to Ireland and Malta.

When asked how long it would take for the number of students that they send to the UK to recover to 2019 levels, only 23% of operators think that the number of students travelling to the UK will return to normal in 2023. A further 40% of operators thought that the number of students that they sent to the UK would return to 2019 levels by 2030, while 4% said that student numbers would recover sometime after 2030 and 33% said that numbers would

never recover while the requirement for all school children to have passports remained in place.

3. The Cause of The Decline In This Market

Operators were asked to rank the importance of various reasons for the 84% decline in students being sent to the UK on a scale of 1-10 with 1 being not really a reason and 10 being a highly important reason. The average score for each reason were as follows:

The Requirement For All Students To Have Passports To Enter The UK	8.1
The Increased Cost Of Travel To The UK	5.9
Concerns Regarding Covid	4.9
Concerns Regarding Congestion/Delays At Borders	4.2
Concerns Regarding Safety	3.5

More importantly, 54% of all respondents rated the requirement for all students to have a passport as a “10”, compared to only 15% who rated increased costs at a “10” and 10% that rated Covid Concerns as a “10”.

As such, this analysis shows that the requirement for students to have passports to come to the UK is by far the most important reason for the drop in students being sent to the UK this year.

4. The Economic Impact of the Decline in Student Group Travel

Research by English UK indicates in 2019 English UK member centres received 194,000 EU/EEA junior students travelling to the UK to attend an English language course, with an average stay of two weeks. VisitBritain estimates the average per capita spend at £1532 per student, including tuition, accommodation, transport, activities and incidental expenditure. These students therefore provided £300 million to the UK economy. Using Deloitte research undertaken for VisitBritain (*Tourism jobs and growth; the economic contribution of the tourism economy in the UK*) which calculates the marginal cost of addition employees in the UK tourism industry, £300m in tourism revenue supports approx 5,000 FTE jobs in the UK economy.

An 84% decline in this market means that just 31,000 are expected to travel to the UK this year. Their spending will amount to just £48m – a loss to the economy of £250m which if not addressed will lead to the loss of 4,200 jobs.

In addition to school students coming to the UK to attend English Language Schools there are an estimated 1m students that come to the UK each year as part of a group on school trips or the attend cultural and sporting events. A 2017 report by BETA (Unlocking the value of youth, student & educational travel) indicates that these students spend around £723 in the UK which contributes £732m to the UK economy. Using the Deloitte research cited above, this revenue supports approx.. 12,200 FTE jobs in the UK economy.

Therefore, an 84% reduction equates to the loss of £615bn in expenditure in 2022 alone and could lead to over 10,000 jobs being lost if it is not addressed.

Combining the losses across all student group travel segments, the total the loss of revenue is approximately £875m and over 14,500 jobs. In VAT terms, this would equate to a loss to the Exchequer of around £130m in 2022 alone.

5. The Urgency of Finding a Solution

Much of the planning for 2023 overseas travel by both EU based travel operators and recipient businesses in the UK that handle groups of children under the age of 18 will occur in 2022. So while the development and implementation of a new scheme now will have relatively little impact on visitor numbers in 2022, it will allow travel operators and businesses in the UK to plan ahead and develop products to win back the UK's share of the EU student group travel market in 2023.

It is also important to note that in the survey, 62% of European operators said that they are sending the school groups that they would have sent to the UK this year to Ireland and Malta instead. This is business that Ireland and Malta will want to retain, meaning that the longer we wait to implement a solution, the more difficult it will be to win back this market. This is because school group leaders often develop a strong loyalty to a particular provider or location and will want to return there in successive years; the risk is that their link with the UK will be irrevocably broken if changes are not implemented as soon as possible.

Therefore, waiting until the end of 2022, let alone the beginning of 2023 will be too late to salvage the 2023 season and will allow changes in student group travel patterns to become more firmly imbedded.

6. What Would a Solution Look like

A new Youth Group Travel Scheme would need to be similar to the previous List of Travellers Scheme whereby students travelling to the UK accompanied by a teacher or supervisor would be able to enter the UK using a collective passport. The use of this collective passport would be available for use by all students able to show that they have a right to live in the EU.

The reason for this is that school groups often contain a mixture of EU/EEA citizens and third country nationals, some of who will be from refugee families resettled in the EU from Syria, Ukraine and elsewhere. If these third country nationals cannot travel with their group due to the expense or difficulty of obtaining a passport and a visa, European operators are likely to choose another EU country that continues to recognise the EU list of travellers scheme.

This problem is compounded by inclusivity requirements in many European countries that prevent school trips if a certain number of students in the class are unable to travel due to cost or logistic difficulties (in Germany the limit is 10% of students in a class – ie 3).

7. Risks to the UK

There are no significant risks associated with developing a Youth Group Travel Scheme. Prior to the UK leaving the EU there was no evidence the List of Travellers Scheme was being abused as a route of entry into the UK. There is no evidence of school children ever being a security risk or leaving their school group to live and work in the UK.

School groups would still be required to travel with a teacher or supervisor who would have to travel on a full passport and be legally responsible for the school children during their stay in the UK (which ensures that the group remains together at all times, including on arrival and departure), while each child would still have to provide their National ID Card details

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