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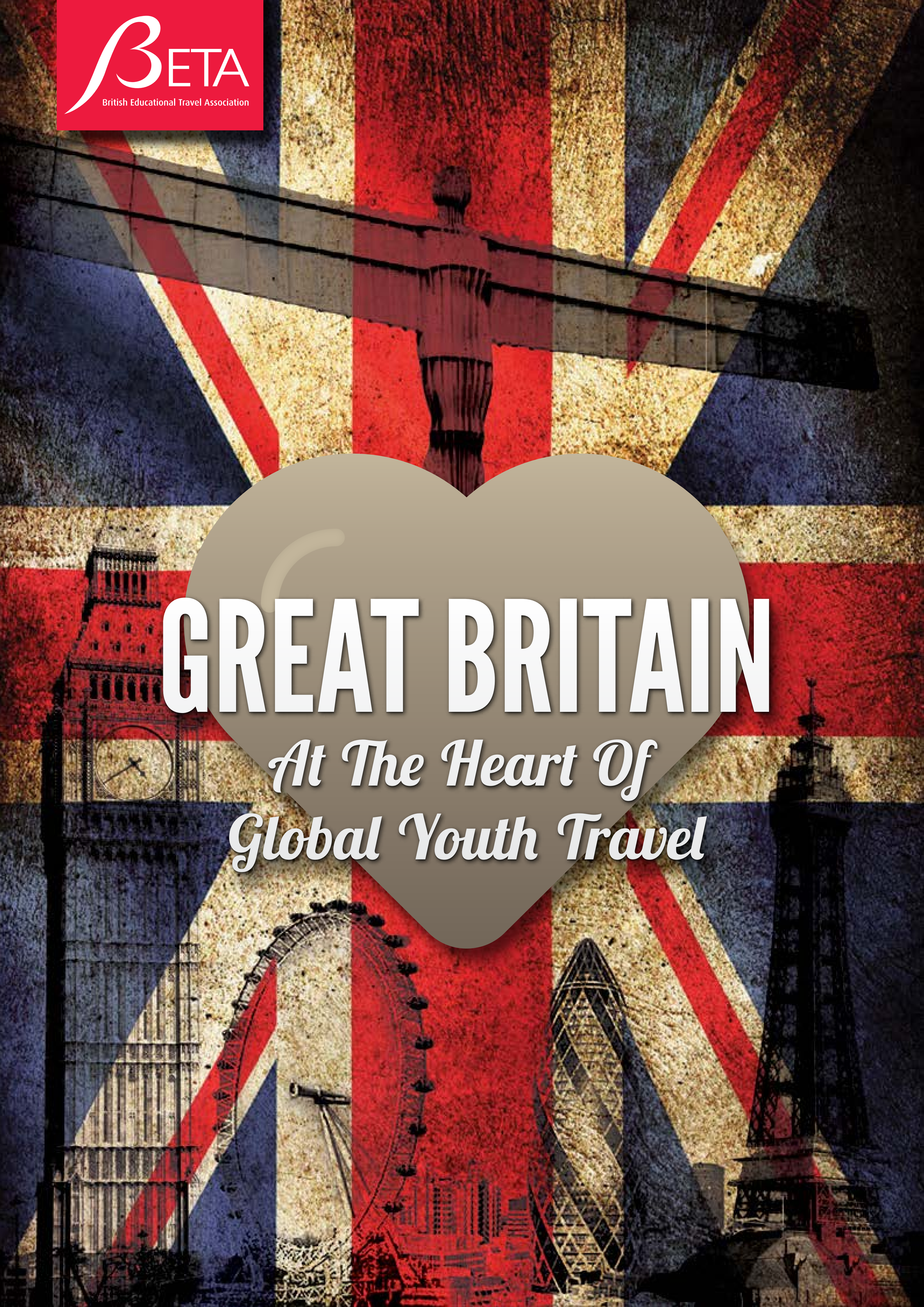

GREAT BRITAIN

At The Heart Of Global Youth Travel

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GREAT BRITAIN

At The Heart Of Global Youth Travel

2013 marks BETA's 10th anniversary and since formation BETA has been providing a network to youth, student and educational travel professionals with a unified voice on industry insights and strategies.

Our many events have provided a platform from which to raise the profile of the sector and to demonstrate the enormous economic value it represents for the UK.

Research and market intelligence is a key factor in defining the sector and in creating awareness that it is thriving. BETA's last piece of research ***"Britain's Shining Opportunity"*** looked at the volume and value of the youth, student and educational travel market to the UK, with findings showing that it contributes over ***£20 billion per annum to the UK economy.***

We are clear that travel from a young age provides experiences, forms opinions, allows greater cultural understanding and tolerance of other cultures and nationalities. We know that such experiences contribute directly to the UK economy and the overall competitiveness of Britain. We also know that young travellers to the UK are likely to return throughout their lifetime, to work, trade and tour.

It was with this in mind that BETA commissioned this consumer facing study, to uncover the trends, influences, attitudes and behaviours of our young audience. The aim is to help to inform our industry as producers and suppliers of youth travel. It is also to inform government departments, official tourism offices and other outside industries that derive a substantial income from these travellers.

Our findings show that ***Great Britain*** is at the ***Heart of Global Youth Travel***, it is an aspirational and inspirational destination for young travellers. Their travel experiences strongly influence that they intend to return frequently, recommend highly and remain faithful to brand Great Britain.

Board of Directors
British Educational Travel Association (BETA)

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British Educational Travel Association

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EXECUTIVE SUMMARY

Ask any young person about their interests and international travel is highly likely to be one of the first that they say. You only have to look at social media profiles to see that travel features highly amongst young people's photos, 'likes' and updates. There are some who will see overseas travel as a means to an end: a way to reach a holiday destination, a place to work or perhaps even to study. Others may view the journey itself as the objective: a way to see new places, enjoy new experiences and literally broaden their horizons as they move from A to B. Some may simply be enthusiastic at the prospect without actively participating.

But whichever way you look at it, travel remains on their radar and continues to drive the global 18-35 year old – or 'youth' – travel industry. Unlike global tourism as a whole, this particular sector is enjoying a post-recession boost in popularity and the UK continues to welcome young travellers from all over the world.

The UK's role as a global youth travel destination has never been more important. In the eyes of young people around the world, the UK is an exciting, trend-setting place to visit and many come here to broaden their horizons and to experience a culture that is fast-paced yet also steeped in history.

But who are they and why do they come here? We wanted to understand some of the reasons behind the UK's long-standing popularity and discover whether there are any trends that may help to bring insight to the sector and to profile the 'typical' youth traveller to the UK.

So we carried out our own study, gathering qualitative and quantitative data direct from inbound UK youth travel audiences who were visiting, had visited in the past 12 months or had plans to visit very soon. This was then combined with industry data and expert viewpoints.

The purpose of this study has been to add value to the sector as it continues to cater to young people's diverse and changing needs. The findings are presented and discussed within this report, along with the implications for the UK's youth and educational travel sector. Some of the findings may seem surprising, some may be reassuring; all will provide important insight.

Ultimately, we were able to use the data to create four youth traveller profiles - junior, student, backpacking and working traveller - and these are presented in the conclusions at the end of this report.

BELOW ARE SOME OF THE KEY FINDINGS OF THE STUDY:

- The UK is a girl magnet: a rising five year trend means that today, 75% of young visitors to the UK are female.
- Half of all young travellers welcome between two and four visitors from abroad during their stay in the UK.
- 95% of young travellers would recommend the UK as a travel destination to friends and family, making them powerful ambassadors for the youth travel industry. Young travellers are particularly enthused about the UK and much more likely to recommend the UK as a travel destination to family and friends than other segments of the travel market.

- 55% of those surveyed describe the UK as a ‘dream destination’ and 65% of the youth travel market had their high expectations of their UK trip exceeded.
- Our survey showed that the UK holds such appeal for young travellers that 70% of them plan to return within five years, despite the fact that they find the UK to be expensive.
- London has not lost its appeal: 83% visit/plan to visit the UK capital. Top five destinations for young people aside from London are: Edinburgh, Oxford, Manchester, Cambridge and Bath.
- Young visitors are not just drawn to bright city lights as many cite Stonehenge, the Lake District, the Cotswolds, the Brecon Beacons and the Highlands as destinations they would recommend to others.
- 86% say a trip to the UK is ‘easy to book and plan’.
- 80% believe that education in the UK is equal to or better than in their own country.
- 70% of youth travellers cite the recommendations of friends and family as the most influential factors when booking their trip.
- The number of youth travellers from Asia is disproportionately low, partly due to expensive and complex visa processes.
- International students are worth an estimated £20 billion to the UK economy[1].
- 28% of young travellers use prepaid cards as their preferred payment method.
- Young travellers are happy with public transport in the UK with 75% saying they find it easy to get around the country.

1 *Britain’s Shining Opportunity*, **BETA (2011)**

OVERVIEW OF STUDY

In order to gather the views of young travellers to the UK and to help paint a well-rounded picture of attitudes towards the UK in the youth travel sector, an online questionnaire ran for five weeks during February and March 2013, ultimately gathering the opinions of 4,151 young travellers aged 11 to 35 years.

It was vital to capture impressions while they were still fresh in participants' minds and so all participants were currently visiting the UK, had visited in the previous 12 months, or were travelling to the UK imminently.

This report takes data from the survey and other contemporary sources in order to identify and analyse significant trends and insights relating to the UK amongst young people. What are their perceptions of the UK as a global travel destination? Who or what influences them when it comes to making those key decisions about travelling? How difficult is it to plan and book a trip to the UK and what potential obstacles exist?

Once they arrive in the UK, what is the purpose of their trip? This report examines the motivations behind their visit, be it work, study or leisure – or a combination of all three – as well as what they do and where they go once they arrive.

We explore their spending habits and whether there are specific events that draw young travellers to the UK.

Finally, new demographic profiles are proposed: profiles that bring together the overall findings of this research into a clearer illustration of the UK-bound youth traveller of today in order to aid better understanding of young travellers and their motivations and behaviours when it comes to visiting the UK.

Throughout the report, the expressions 'youth traveller' or 'young traveller' refer to 18-35 year-olds who are travelling to the UK, whilst the expression 'junior traveller' refers to the 11-17 year-old age group. Since many of the aspects covered in the report – for example, long-term university study, working in the UK and travelling to different parts of the country – are not directly applicable to this junior age group, it is included simply to give a complete overview of the demographic. They do represent, however, an important segment of the youth travel market so it is important to consider and understand their motivations (and, perhaps crucially, those of their parents) for choosing to visit the UK, where they stay and what they do.

source: Shutterstock ©YanLev

WHY THE UK?

OK, UK?

As a small island crammed with millions of people, thousands of tourist attractions in hundreds of towns and cities, young travellers are undoubtedly spoilt for choice when it comes to making plans to visit the UK. But the ability to combine study, work and leisure is how many view the UK's role as a global youth travel destination.

The UK has a valued status as a global tourist destination and our survey reveals that the UK represents something very special to young people, ruling both their hearts and their heads (not to mention their feet) when it comes to making those all-important travel choices. For under 35s, it seems to be viewed almost as a 'respected teacher' of both academic and life skills. For the more independent traveller, the UK is a home from home.

Fig 1: Young travellers' perception of the UK

01 YOUNG TRAVELLERS' PERCEPTION OF THE UK

To what extent would you agree with the following statements?
1 = Strongly disagree 5 = Strongly agree

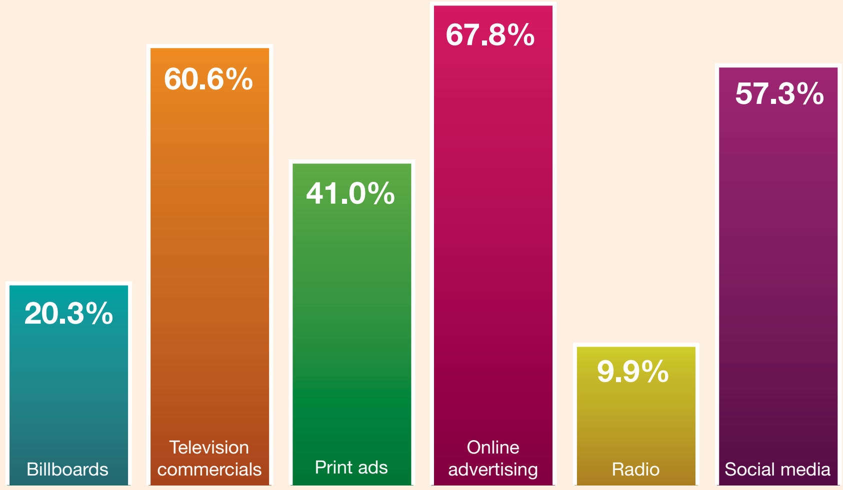
- 4.05 I will come back again within the next 5 years
- 3.98 I have enjoyed my experiences in the UK more than I anticipated
- 3.97 The UK is expensive
- 3.92 The UK is exciting
- 3.66 The transition into life in the UK was simple
- 3.60 The UK is a dream destination for travelling
- 3.46 Culture in the UK is oriented towards 'young people'
- 3.44 The UK is an ideal place to live long term
- 3.08 I think people would have a higher opinion of me if they knew I had been to the UK

(Source: BETA Youth Travel Audit)

02 IMPACT OF GREAT BRITISH ADVERTISING ABROAD

(Source: BETA Youth Travel Audit)

What type of advertsing have you seen?



Our research found that advertising can have a big impact when it is seen. 47% said that they had seen advertisements for the UK as a travel destination in their home country, with most of these seen online, but television, social media and print advertisements close behind. Of those who saw the adverts, 40% said they had had an impact on their decision to travel to the UK. One in five could recall seeing billboard advertising in their own country but only a small proportion were aware of any radio advertising – although it is unclear from this data alone whether this reflected a lower level of radio advertisements for travel to the UK or simply lower awareness.

Fig 2: Impact of Great British advertising abroad

A DREAM DESTINATION FOR YOUNG TRAVELLERS

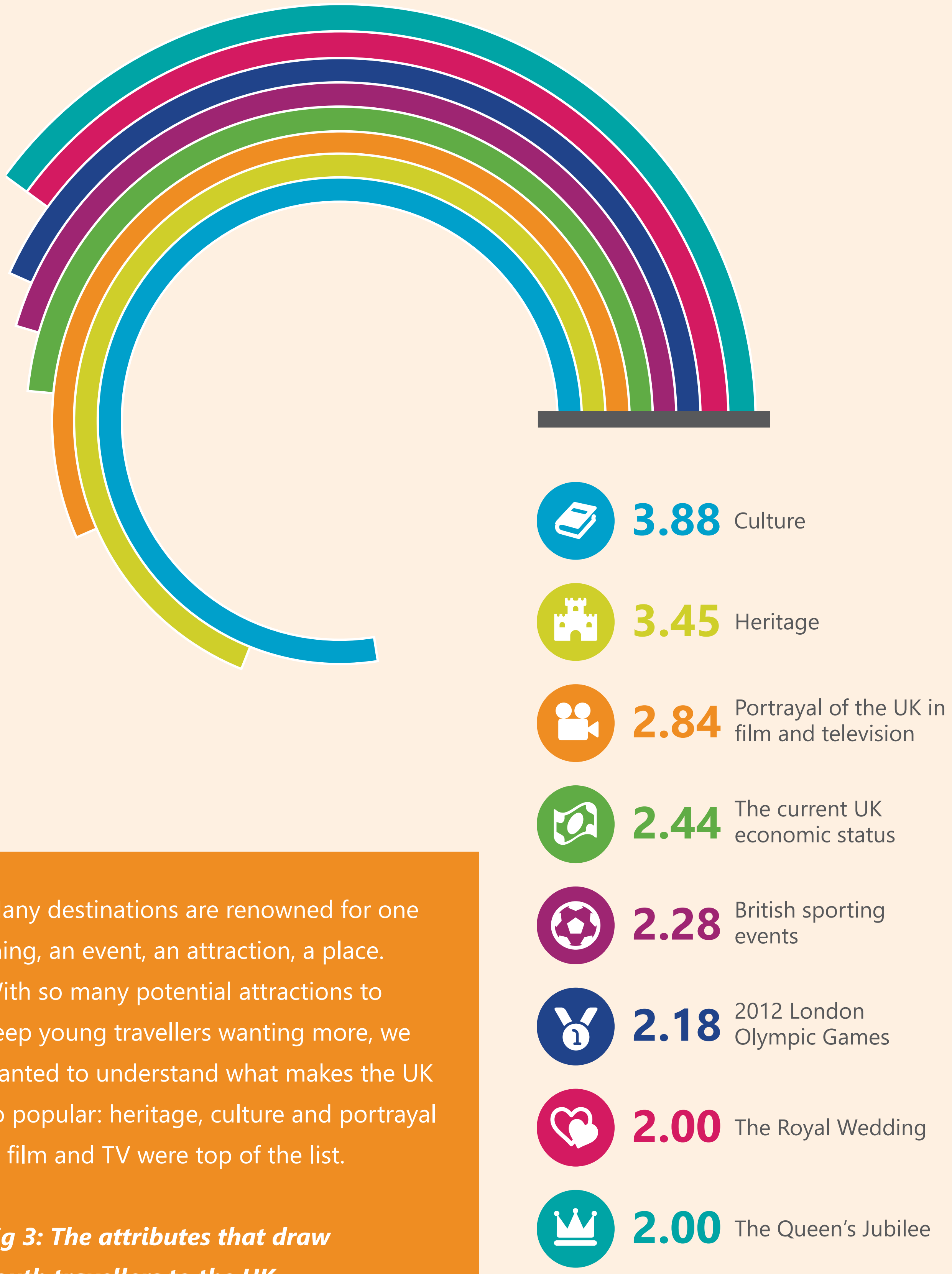
More than half of the young people we surveyed agreed that the UK is a 'dream destination' and 95% of young travellers are likely to recommend the UK as a must-visit location to their family and friends compared with 83% of the overall tourism market,[1] meaning the UK can boast word of mouth and referrals as a marketing tool with lots of potential. Not only are they enthusiastic promoters of the UK but they're pleasantly surprised by their visit, with 65% saying that their trip exceeded their expectations.

1 Britain's Welcome to Visitors CAA Passenger Survey, VisitBritain (2012)

03

THE ATTRIBUTES THAT DRAW YOUTH TRAVELLERS TO THE UK

What about the UK appeals?
1 = No appeal 5 = Major appeal



(Source: BETA Youth Travel Audit)

Many destinations are renowned for one thing, an event, an attraction, a place. With so many potential attractions to keep young travellers wanting more, we wanted to understand what makes the UK so popular: heritage, culture and portrayal in film and TV were top of the list.

Fig 3: The attributes that draw youth travellers to the UK

75%

of all youth travellers to the UK are female

source: Shutterstock © Franck Boston

TRAVEL TRENDS

THE UK IS A GIRL MAGNET

Our survey showed that 75% of all youth travellers to the UK are female, a trend that has been on the rise with globetrotting females over the last seven years. In 2007, a WYSE New Horizons study showed that 71% of all young travellers globally were female. Young women tend to come to the UK independently to explore whilst their male counterparts tend to come to the UK as part of their undergraduate degrees.[1]

A potential reason for the scales tipping towards female visitors is that the UK is seen as a cultural centre steeped in heritage and history. This aspect of travel was shown to appeal more to women than men, with 30% and 22% respectively drawn to the UK for this reason alone.

1 New Horizons II, The Young Independent Traveller, WYSE Travel Confederation (2007)

Young women also seem more inclined to go it alone. This is supported by a 2013 Pulse Poll survey of travel agents[2] in the USA found it was more common for women to travel alone than for men. In fact, 73% noted that they had far more female travellers booking solo trips than their male counterparts.

Many of the qualitative interviews carried out for this study appeared to confirm this about international travellers visiting the UK. A large proportion of travellers who want to work and explore while they are over here highlighted the difficulties in organising travel with friends due to conflicting schedules and budgets. This frequently resulted in many young people travelling alone, which is a possible explanation for the female trend to go solo.

However, the findings of a survey by a US travel website aimed at women[3], Gutsy Traveler, suggested that the reasons women are more likely to travel alone are that they value their independence and are sophisticated and mature enough to do it on their own.

Our study found that the UK is a multi-visit destination and the vast majority of youth travellers plan to return to the UK – 70%

2 Pulse Poll: Solo Travel Trends, Travel Guard (2013)

3 The Gutsy Traveler, Marybeth Bond (2013)

source: Shutterstock © lightpoet

stating that they will do so within the next five years. The inability for young travellers to stay away has contributed to the recovery of the general UK tourism market in the wake of the global recession. This is in stark contrast to business tourism, which has suffered a decline of more than 25% for inbound overseas trips since 2006.[4]

THE UK IS EXPENSIVE BUT WORTH THE MONEY

There is no getting round the fact that the UK is an expensive destination, especially when the majority of young travellers head straight to London; one of the world's most expensive cities in terms of accommodation, travel, food and entertainment. 65% of Chinese travellers and 55% of US travellers find it a very expensive place and in the case of young Chinese travellers, this is reflected in the amount of money they spend per day which is considerably less than other nationalities.[5] European visitors, however, are least likely to find the UK excessively expensive.

4 Business Tourism Action Plan 2010-2020, Visit England (2010)

5 International Passenger Survey, Office for National Statistics (2012)

STRENGTH IN NUMBERS FOR VISITORS

Half of all young travellers are responsible for bringing even more visitors to the UK, with the average young traveller welcoming between two and four more overseas visitors during their stay. Many of that group will already be renting flats or houses so their visitors are most likely to stay with their hosts in many cases.

Our study found that many young travellers coming to the UK and finding work are professionals who have already made a start in the world of work in their home countries. 32% will have a monthly salary of between £1-2,000 with 21% earning more than £2,000 a month.

But cash is not a popular choice for young visitors and many choose to pay for goods and services by means of prepaid cards. In fact, it was the most popular way to pay across all ages and nationalities, with 28% of all young travellers saying they used prepaid cards more than any other method.

PURPOSE OF VISITING THE UK

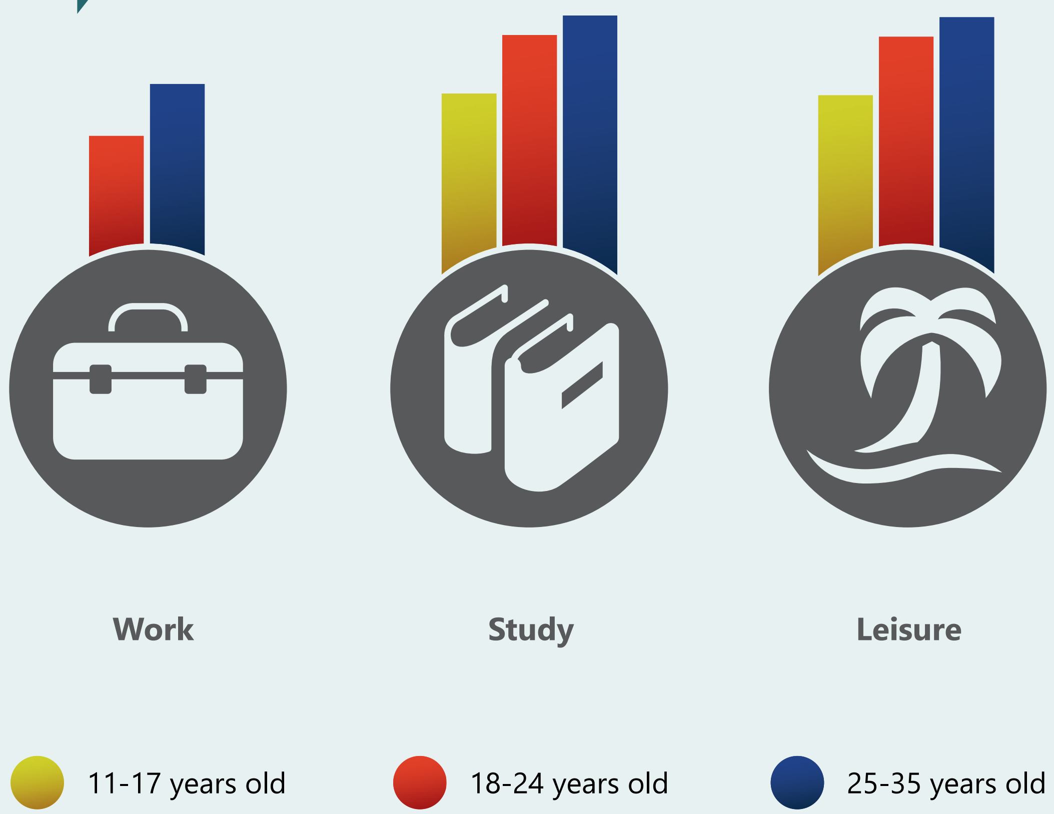
The UK is seen as a 'work hard, play hard' destination that combines a deep-rooted heritage with a globally recognised culture. The majority of travellers therefore choose to combine some form of work or study with a large chunk of leisure on their trip. Young people want to learn in the UK, with over 45% of young travellers arriving for the sole purpose of education and 75% planning an element of work or study into their trip.

The UK has a respected history from which other cultures want to learn. Many of our respondents were here to study, 100% were here to learn something new about history, culture, themselves or their life journey.

Fig 4: Main purpose of trip

04

MAIN PURPOSE OF TRIP



(Source: BETA Youth Travel Audit)

source: Shutterstock © lightpoet

The main purpose for visiting the UK varied significantly between age groups that were surveyed. Perhaps not surprisingly, those under the age of 18 were predominantly visiting the UK to study, usually for a period at a language school in order to boost their English skills. Those aged 25-35 were around 25% more likely than the 18-24 year-olds to be visiting the UK predominantly to work; whereas those in the 18-24 year old group were almost twice as likely to be visiting mainly for study purposes.

Nevertheless, our findings indicate that leisure is the top priority for all 18-35 year-olds visiting the UK, regardless of whether they are combining their trip with work or studying.

VISITING THE UK TO WORK

With 31% of young travellers choosing to stay between one to three years, many see the UK as a home away from home.

For the long-stay traveller, creating a temporary home is made easier by the multi-cultural nature of cities around the UK. This dynamic is especially noticeable in London where most nationalities feel they have a community that they can plug straight in to.

The majority of our respondents indicated working in the tourism and hospitality sector, an industry in the UK which employs over 2.7 million people per annum. Figures show that 14% of workers in the UK tourism and hospitality sector were non-UK nationals. Other industries included education and administration.[1]

Working holidays are a thriving sub-sector of youth travel with many countries introducing new partnerships and conditions to encourage working holiday makers, so far none with greater success than the Australians. In 2012 a total of 220,000 Australian working holiday visas were issued – 35,000 of those to young Brits.

In 2013, the UK has allocated 54,500 places to the Youth Mobility scheme.

VISITING THE UK TO PLAY

The UK is highly regarded for offering fun and entertainment and 74% of our respondents giving the quality of this entertainment a rating of four or more out of five. Young travellers' favourite activities included visiting the major tourist cities and landmarks.

One major difference between youth travellers and other segments of the tourist market is that the older tourists cite shopping in London as a major attraction[2] whilst younger travellers are drawn more to exploring what the UK has to offer.

1 Characteristics for Workers in Tourism, Office for National Statistics (2011)

2 Visitors from overseas in different areas of the UK, VisitBritain (2010)

Favourite UK activities, cities, landmarks
(Source: BETA Youth Travel Audit)

source: Shutterstock © Andresr

VISITING THE UK TO STUDY

The UK is a powerhouse of teaching with three UK universities featuring in the top 10 universities in the world.[3] But it is not just universities where learning takes place – the young traveller visits a number of towns, cities and landmarks to learn more about British history. The UK's role as a global teacher extends beyond simply academia into life lessons and social skills. Urban centres are most likely to attract young travellers, with the vast majority (89%) being drawn to London and other major cultural cities such as Oxford, Cambridge, Bath and York. However, many young travellers venture into the British countryside to visit cultural and historical landmarks. These include Stonehenge and the Jurassic coast as well as major castles such as Warwick and Leeds.

They study, improve their English where appropriate, explore Europe and feel the UK is a firm base from which to learn core skills along their journey into adulthood and, ultimately, independence.

Of all young travellers coming to the UK a large proportion do so for the sole purpose of education. The UK has a strong global academic reputation as well as the natural advantage of the English language. International students are increasingly providing a huge boost to the UK economy, contributing an estimated £8 billion[4] when taking into account tuition fees, accommodation, living and travel expenses as well as money spent on entertainment and general recreation.

Research from the Department for Business Innovation & Skills (BIS) estimates that tuition fee income to the UK in 2008-09 was worth over £4 billion divided between higher education, further education and language tuition. The same research estimates the total value of UK education and training exports to the UK economy at £14 billion, with a projection that this could rise as high as £26 billion by 2025.[5]

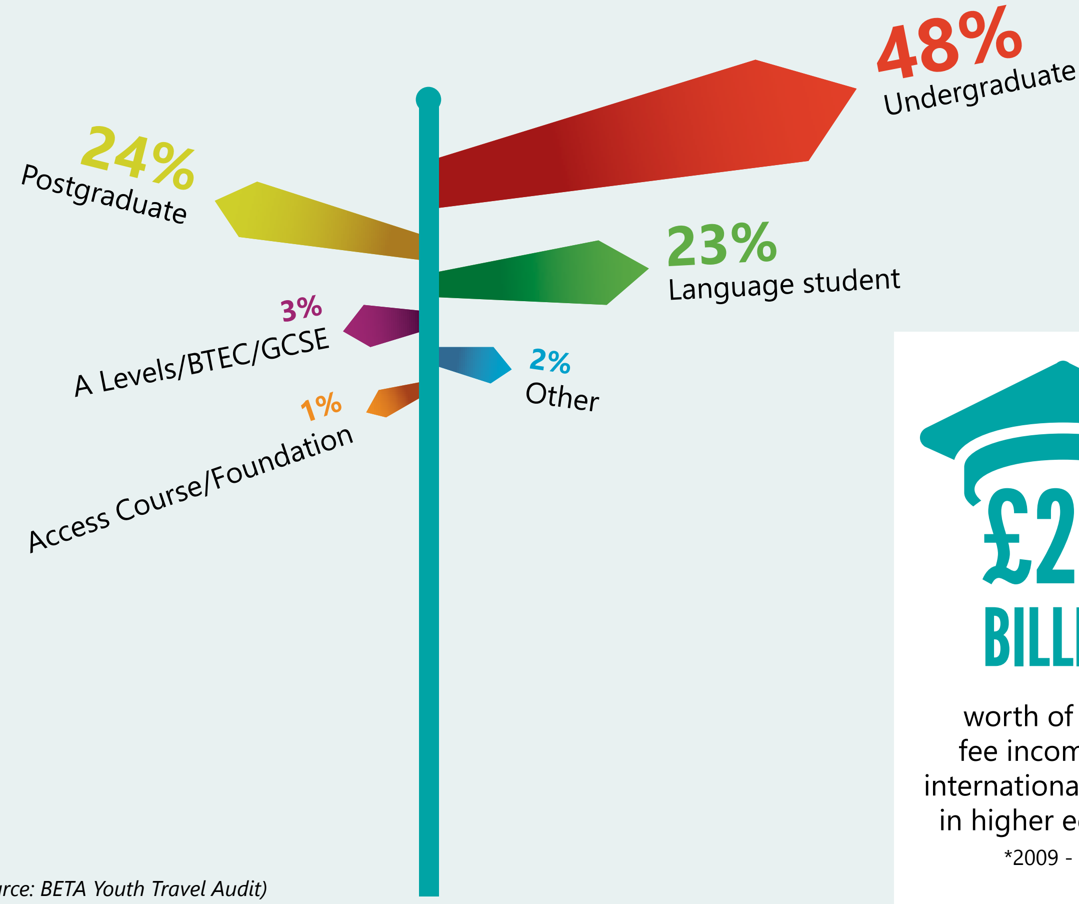
3 World University Rankings 2012-2013, The Times Higher Education (2012)

4 What's the value of a UK degree?, Million+ group (2013)

5 Estimating the value to the UK of Education Exports, Department for Business Innovation and Skills (2011)

05

THE LEVEL OF STUDY FOLLOWED BY YOUTH TRAVELLERS



(Source: BETA Youth Travel Audit)

£2.4 BILLION

worth of tuition fee income from international students in higher education

*2009 - 2010

A DEGREE OF INTEREST IN THE UK

Nearly half of young visitors come to the UK with the sole intention of studying. 48% of these are undergraduates – some come to study for the duration of their course while others arrive on exchange programmes such as Erasmus. In our study, a quarter of international students were enrolled in postgraduate courses. Recent data from 2009-2010 shows that there were 405,810 non-UK students in higher education[6], with tuition fee income worth about £2.4 billion to the UK.

A large number of students come to the UK to improve their English skills and 20% enrol into language schools.

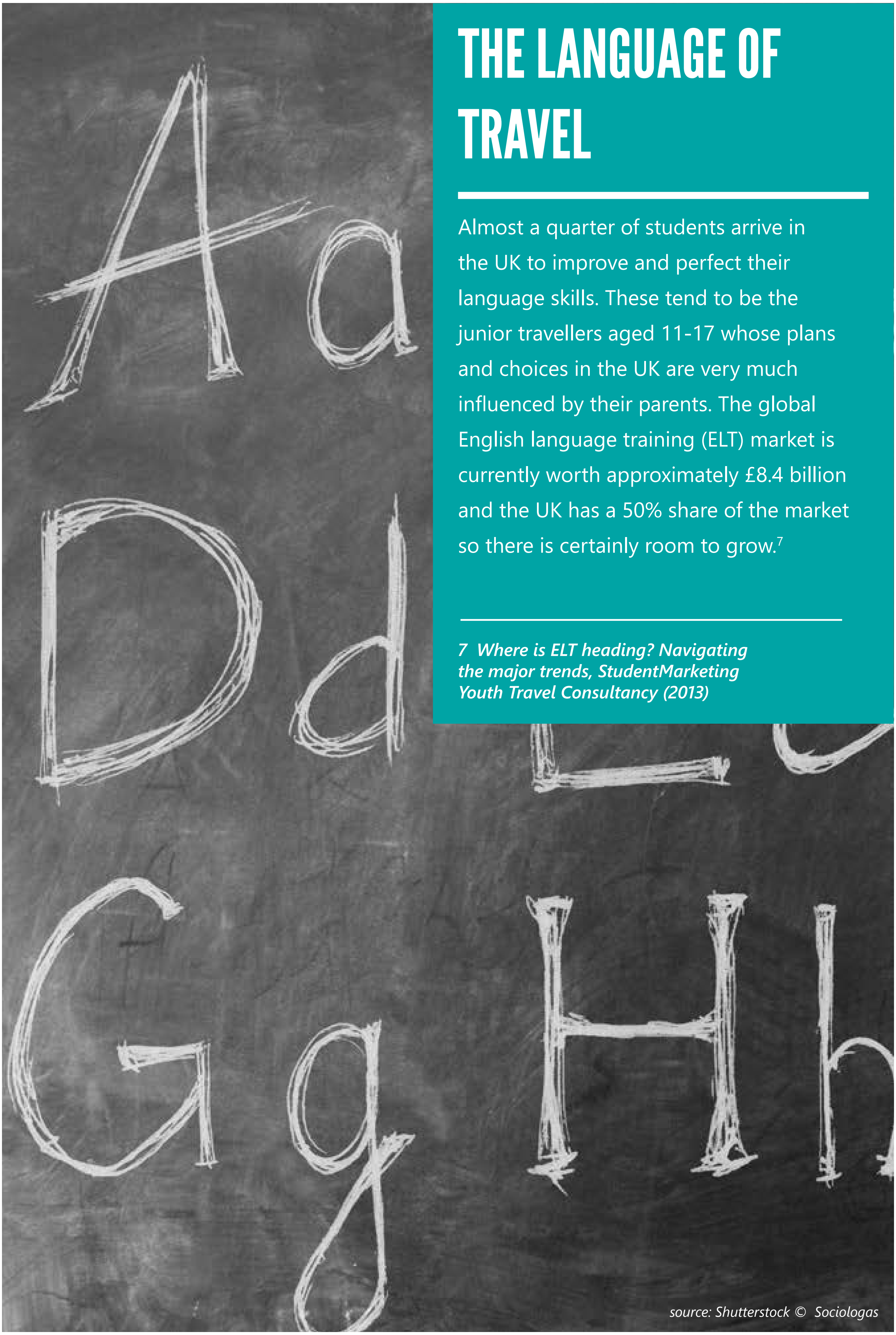
Fig 5: The level of study followed by youth travellers

6 International Students in UK Higher Education, UK Council for International Student Affairs (2011-12)

THE LANGUAGE OF TRAVEL

Almost a quarter of students arrive in the UK to improve and perfect their language skills. These tend to be the junior travellers aged 11-17 whose plans and choices in the UK are very much influenced by their parents. The global English language training (ELT) market is currently worth approximately £8.4 billion and the UK has a 50% share of the market so there is certainly room to grow.[7]

7 Where is ELT heading? Navigating the major trends, StudentMarketing Youth Travel Consultancy (2013)



source: Shutterstock © Sociologas

CROSSING OCEANS FOR OUR ACADEMIC REPUTATION

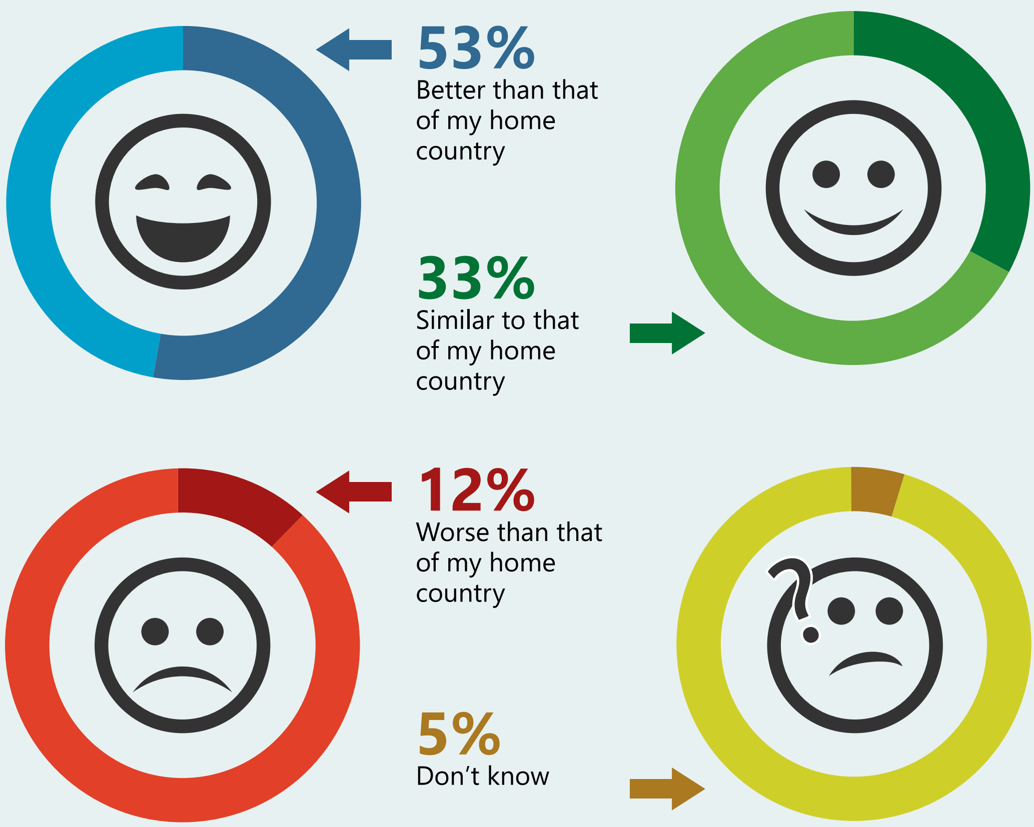
Many choose to come to the UK to complete at least part of their studies in order to enhance their personal development, broaden their horizons and experience education abroad. The academic reputation of the country is seen as a big draw and before starting their studies in the UK, 53% of foreign students expect the quality of education to be better than that of their home country whilst a third feel it to be about the same.

Fig 6: The UK's academic reputation prior to study

06

THE UK'S ACADEMIC REPUTATION PRIOR TO STUDY

Before coming to the UK, how did/do you anticipate the quality of the education to be in comparison to your home country?

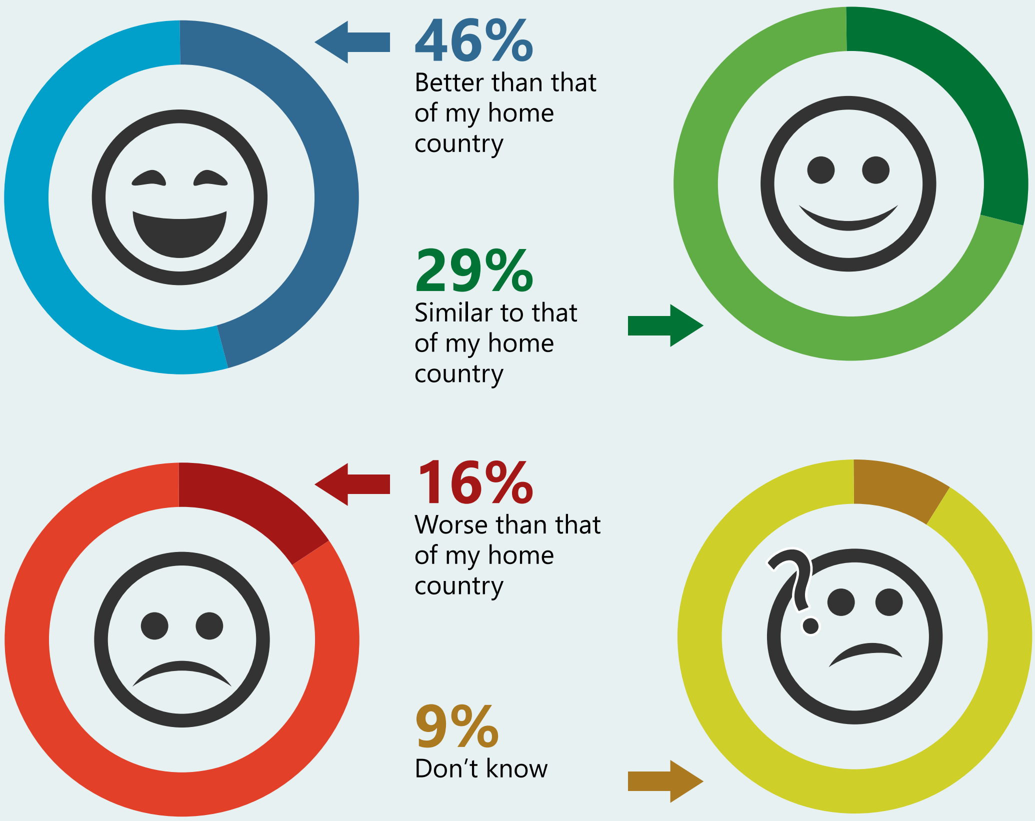


(Source: BETA Youth Travel Audit)

07

THE UK'S ACADEMIC REPUTATION POST STUDY

After studying in the UK, looking back at your experience, how would you compare the quality of education in the UK to that of your home country?



(Source: BETA Youth Travel Audit)

BUT AFTER THE EXAMS...

It is interesting to note, however, that after they have completed their studies in the UK, opinions shift slightly: only 46% of foreign students believe the standard to be higher than in their home country. The number who felt standards were lower than in their country of origin rose from 5% to 9%. Students who tended to be disappointed with the standard of education they received (16%) were Australian and German, along with a very small minority from the USA, Hong Kong, Sweden and Spain.

Fig 7: The UK's academic reputation post study

INFLUENCERS AND DECISION MAKING

There are many forces in action that impact on a young traveller's decision-making process. Understanding the booking journey gives us a glimpse into the process of how they decide where to visit. The UK faces global competition and understanding the decision making journey will allow organisations to start to measure how they are performing at each stage of that journey. The booking journey follows four clear steps – Inspiration, Discovery, Booking and Post-Booking.

Perhaps unsurprisingly, the internet has become an increasingly influential factor when it comes to the decision-making process. However, in the first instance, we found that the young traveller still turns to friends and family for advice and recommendations. Indeed, 70% say the greatest influencers on their booking journey were friends and family.

In this study, friends' opinions were seen to carry marginally more weight than those of family, with social media, websites and guide books scoring as the next most influential elements of the decision-making process.

Fig 8: The key influence on a young traveller's decision-making process

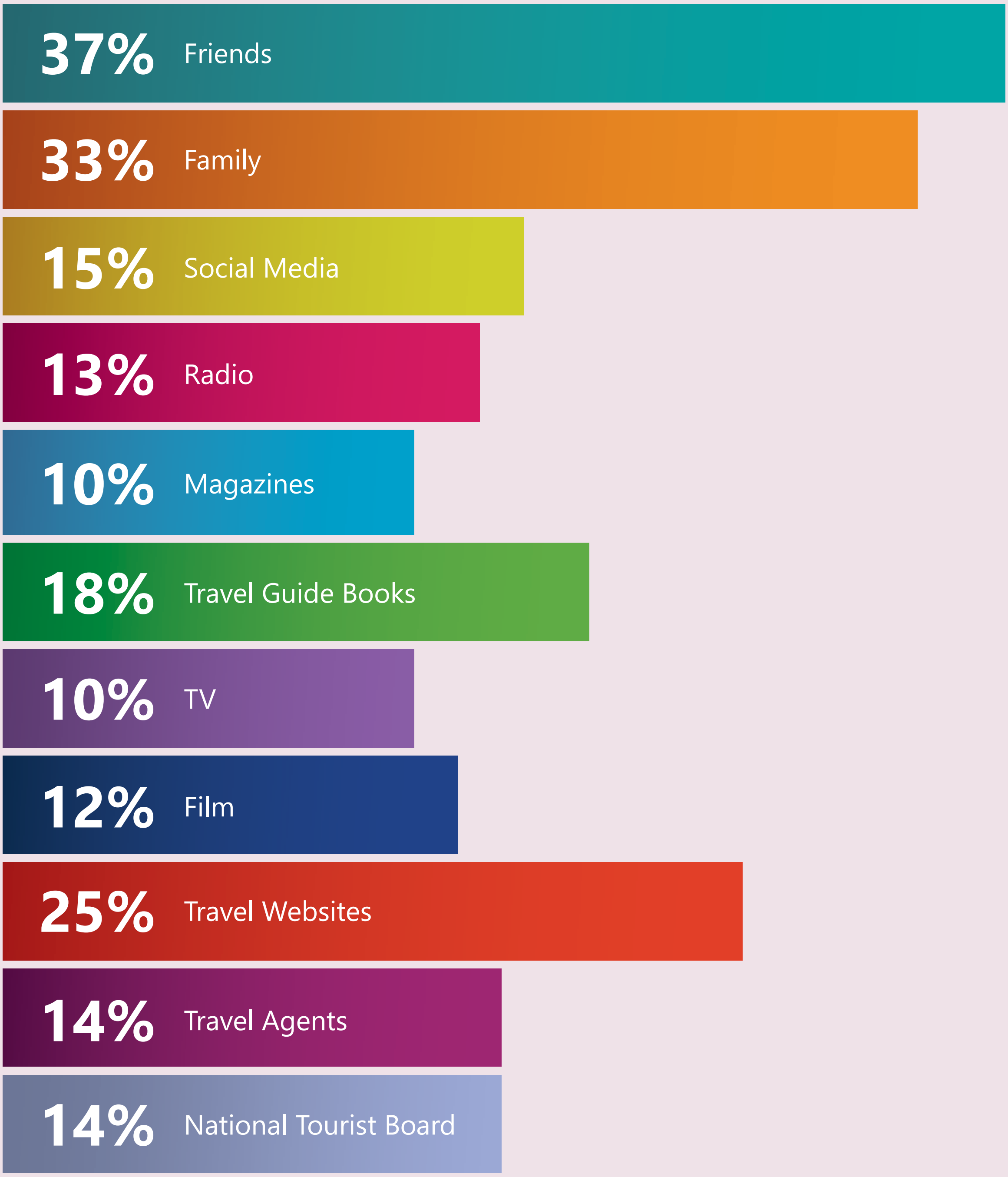
FAMILY AND SOCIAL INFLUENCES SHOULD NOT BE UNDERESTIMATED

Word of mouth is still the most powerful marketing tool in young traveller circles, although this finding could easily be translated across social media channels which are, in their own way, conversation enablers between peers and wider audiences who share interests. Most young travellers are single and will group together around such common interests, with word of mouth and social networking playing a central role in their decision-making choices.[1]

1 Overseas Visitors to Britain: Understanding Trends, Attitudes and Characteristics, VisitBritain (2010)

08 THE KEY INFLUENCERS ON A YOUNG TRAVELLER'S DECISION-MAKING PROCESS

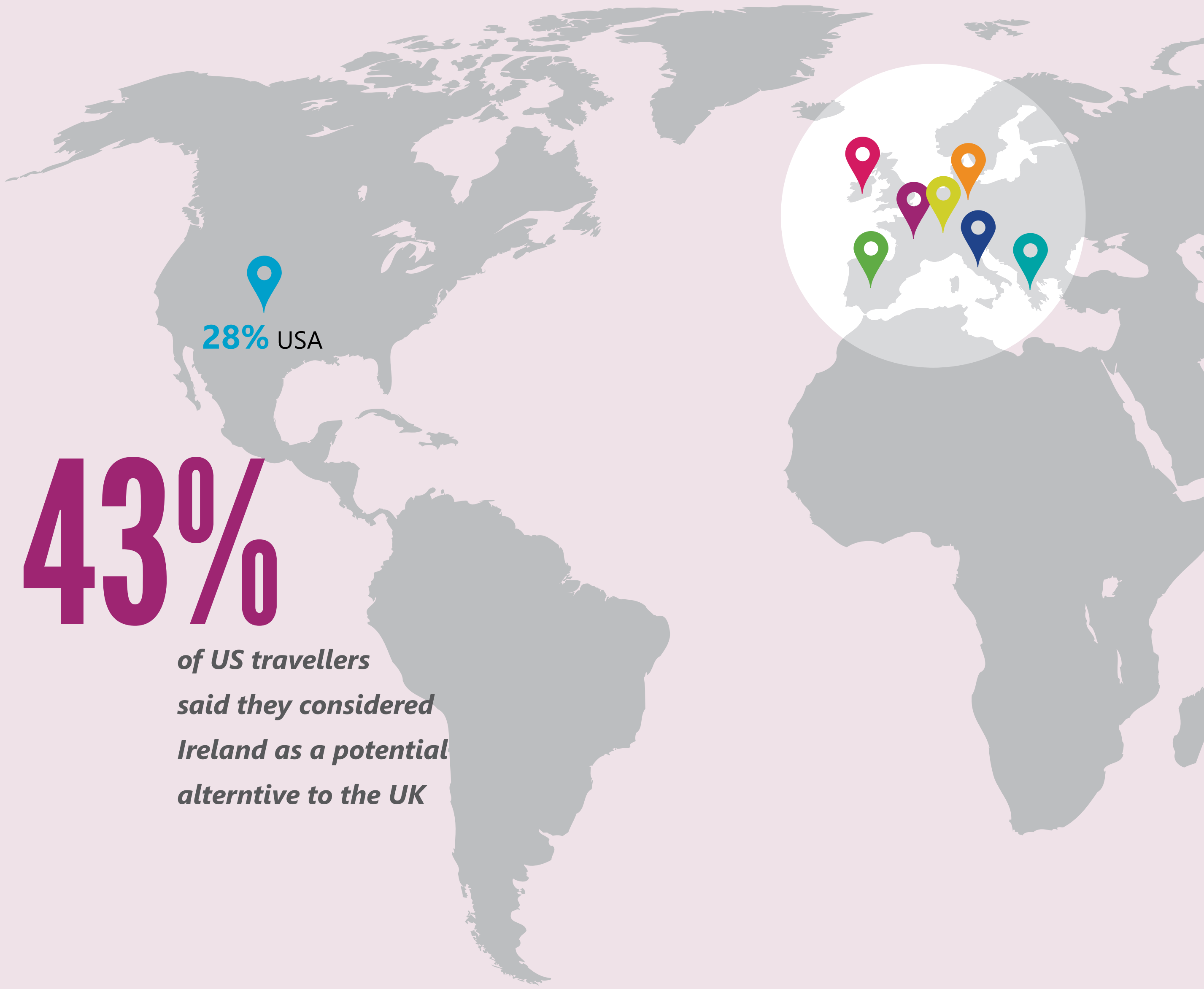
When making your travel plans who/what were your main influences?
(1= least influential, 5= most influential)



(Source: BETA Youth Travel Audit)

09

OTHER COUNTRIES CONSIDERED WHEN BOOKING THEIR TRIP TO UK



43%

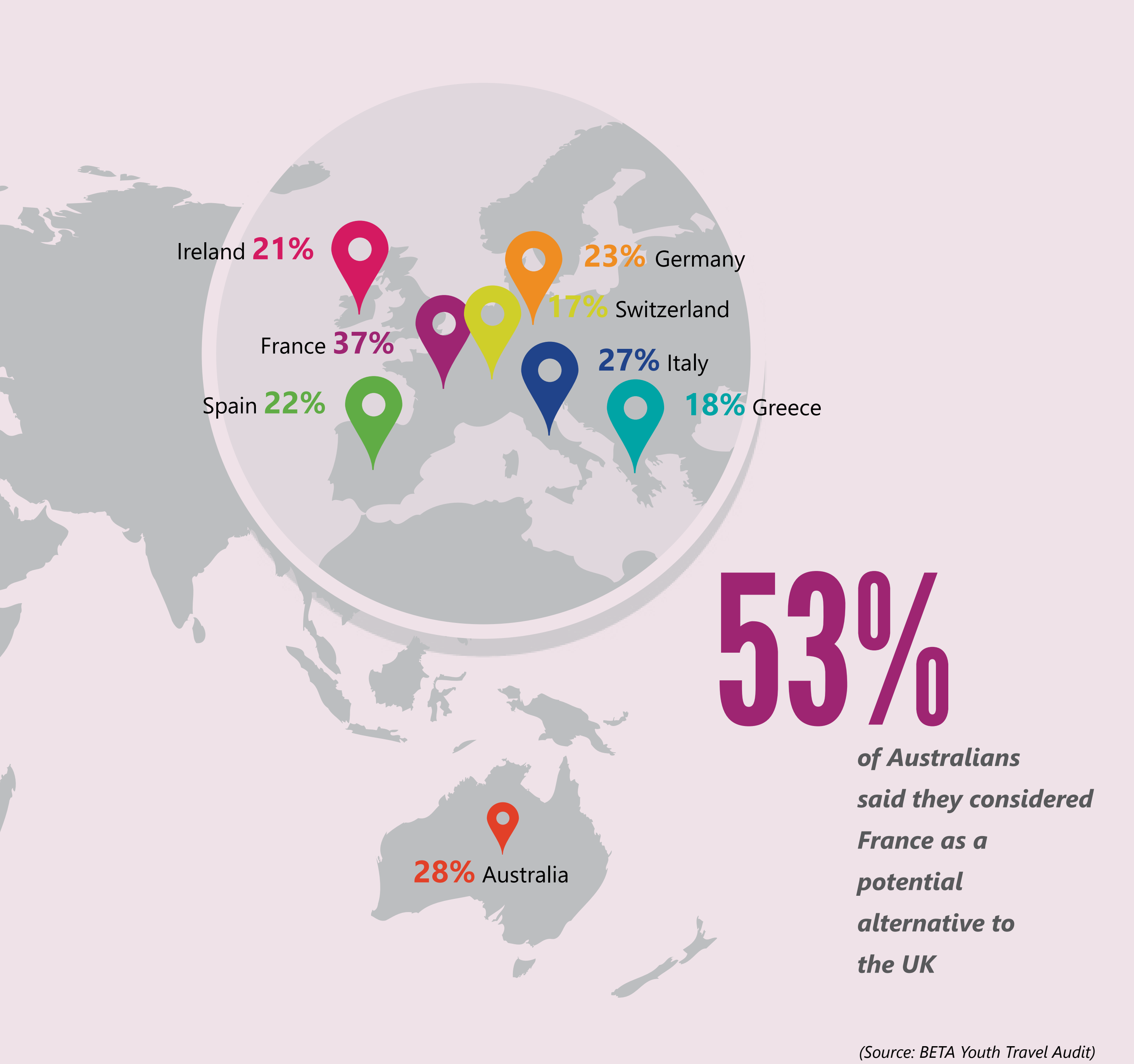
of US travellers said they considered Ireland as a potential alterntive to the UK

UK VS. THE WORLD

The battle with Europe is for culture and heritage and the battle with the USA is for education and language. Competition is fierce and all young travellers have a shortlist, considering a number of destinations before deciding on the UK.

The UK is a very popular youth travel destination but when our respondents were asked which other destinations they had considered in the decision-making process, they said France (37%), the USA (28%), Italy (27%) and Germany (23%).

For young travellers looking to improve their English language skills, the UK has



the upper hand against other English-speaking countries as 'British English' has a certain 'snob value' over its competitors – Canada, Australia and the USA[2].

France represents the main competitor to the UK when it comes to antipodean visitors with 53% of Australians and 47% of New Zealanders saying they considered it as an alternative to the UK. For a large number of US travellers, however, Ireland is seen as a potential alternative (43%).

Fig. 9 Other countries considered when booking their trip to UK

2 Overseas Visitors to Britain: Understanding Trends, Attitudes and Characteristics, VisitBritain (2010)

FINDING THE FUTURE THROUGH UK EDUCATION

All students agree that having completed part or all of their studies in the UK is a valuable experience, even if a minority feel the standard of education did not fully meet their expectations. They feel that the education received in the UK will define them and stand them in good stead in the future and 29% believe that people will have a higher opinion of them for having spent time in the UK.

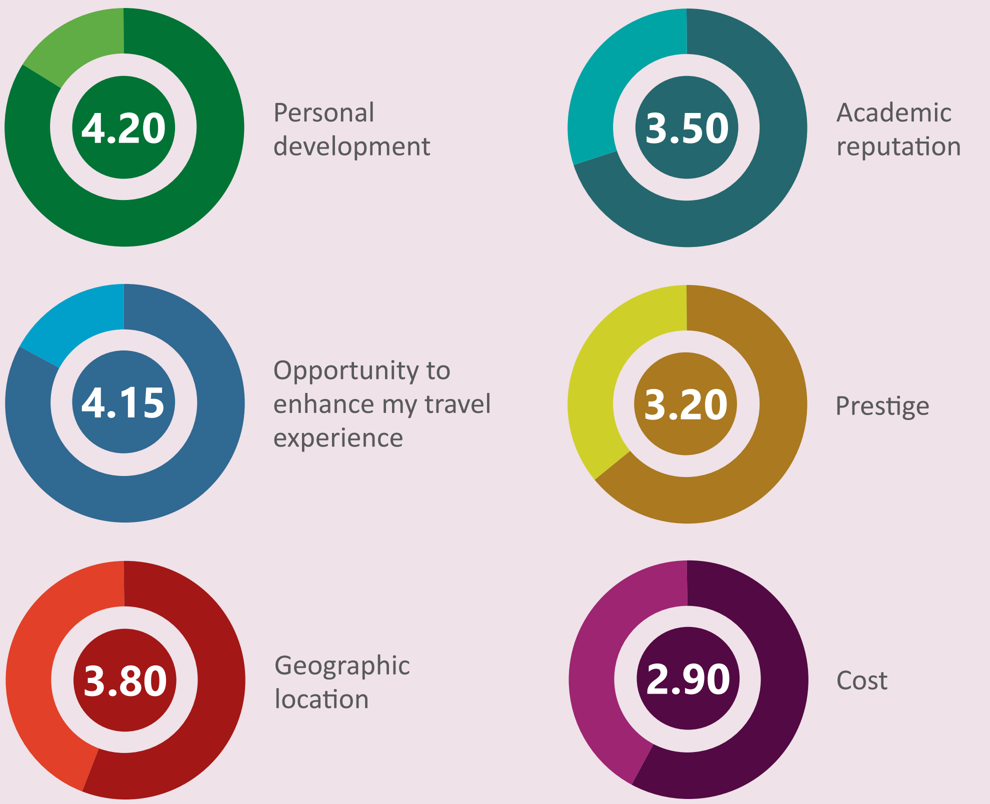
Although the UK's quality of education is held in high regard, the draw of studying in the UK is not necessarily the course itself but rather a chance to travel, to experience living abroad and learn something about another culture and way of life.

Fig. 10 Factors influencing decision to study in the UK

10 FACTORS INFLUENCING DECISION TO STUDY IN THE UK

Please rank in order of importance the extent to which the following factors influenced your decision to study in the UK

1 = Least important, 5 = Most important



(Source: BETA Youth Travel Audit)

source: Shutterstock © wavebreakmedia

BEFORE DEPARTURE

The youth traveller works hard in order to come to the UK. 62% work and save to pay for their trip against 15% who had their parents pay for the trip. A small minority are able to pay for their stay by means of a bursary or scholarship.

Overall, the experience of young travellers entering the UK was a positive one. 39% mentioned that the stringent security procedures make them feel that the UK is a safe place and make them feel more comfortable on their trip.

86%

of youth travellers to the UK say that the process of booking their trip was simple and straightforward

source: Shutterstock © Odua Images

THE BOOKING PROCESS

THE UK IS AN 'EASY TO BOOK AND PLAN FOR' DESTINATION

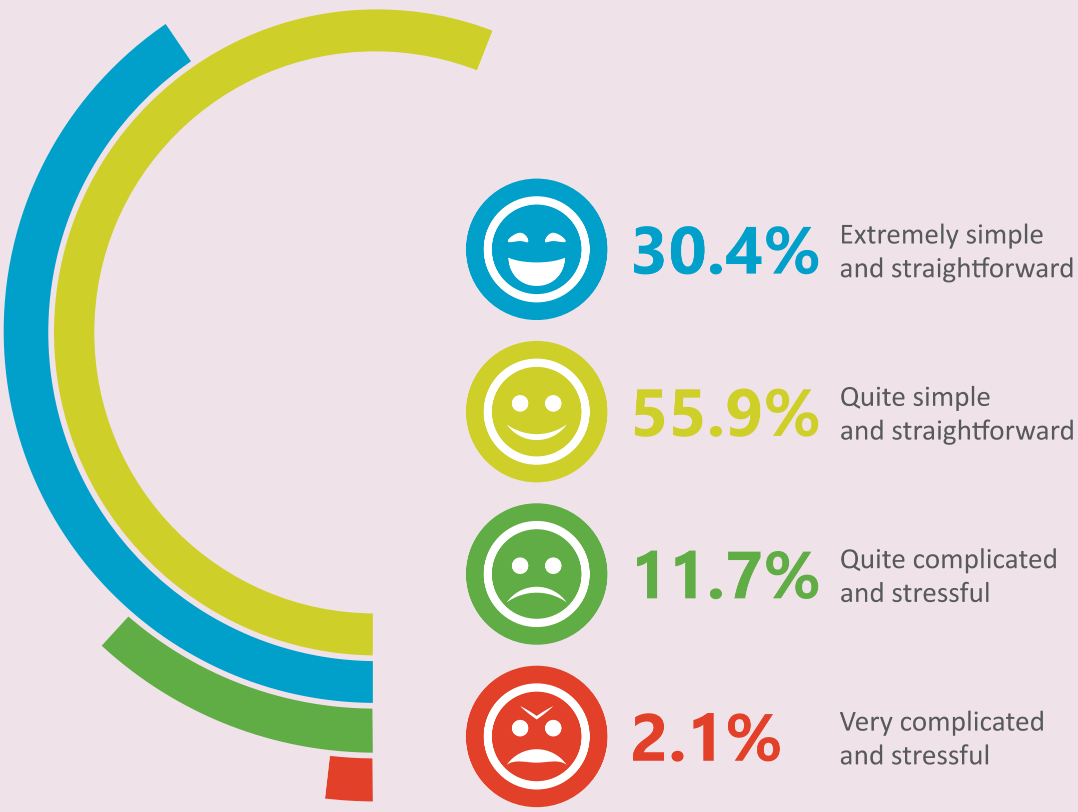
86% of youth travellers to the UK say that the process of booking their trip was simple and straightforward. They are spoilt for choice when it comes to sources of information on the UK, including past experiences of friends and family, social media such as Facebook and Twitter as well as more traditional sources such as guidebooks and travel websites.

Fig 11: Organising a trip to the UK is easy for most

11

ORGANISING A TRIP TO THE UK IS EASY FOR MOST

How did you find the whole process of researching, booking, travelling to and arriving in the UK?



(Source: BETA Youth Travel Audit)

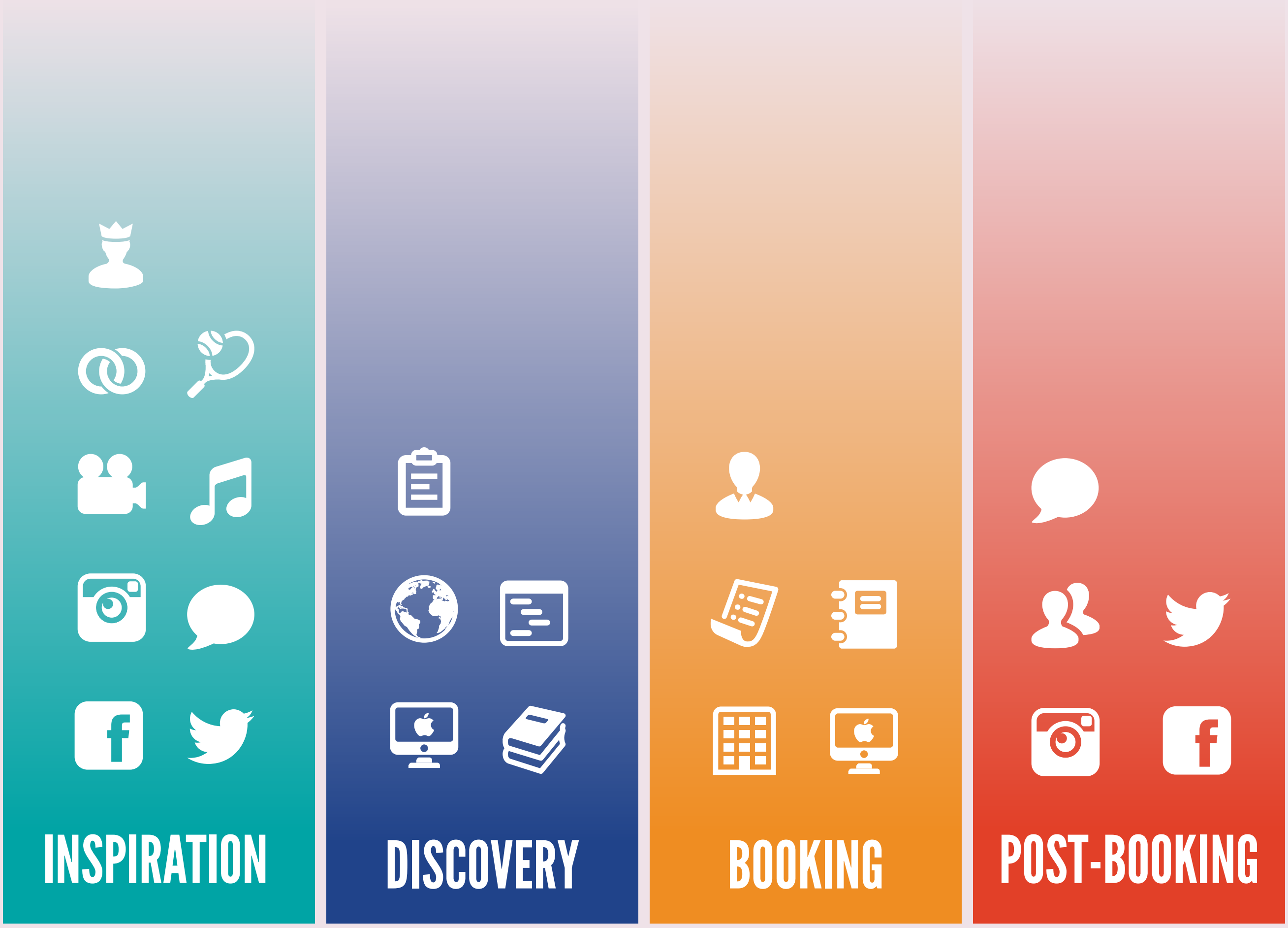
TRAVEL AGENTS IN THE 21ST CENTURY

In this study we saw a very small proportion of travellers booking their trips through non-traditional routes. However, when you consider that as little as five years ago these alternative options were not even on the radar, this emerging trend is starting to grow with the potential to become a popular feature on the travel landscape. A small proportion of travellers are seeking out a personal experience, booking accommodation through couch-surfing websites. We have seen this trend rise globally and with Germany, France, Australia, China and the USA within the top 10 countries by couch-surfing population, we would expect this to rise in the UK over the next five years: 60% of all couch-surfers are aged 18-29 – the core age bracket of the youth traveller market[3].

3 Statistics, Couch Surfing (2012)

source: Shutterstock © William Perugini

12 THE YOUTH TRAVELLER BOOKING JOURNEY



Social media
TV and film
Single events
in the media

Guidebooks
Travel websites
National tourist
boards

Online through
specific tour
operators and
organisations

Social media
Conversation
and stories

THE YOUTH TRAVELLER BOOKING JOURNEY

The booking journey for the youth traveller has four steps and at each stage of their journey they are turning to very different sources each time starting and ending with social media.

BARRIERS TO BOOKING

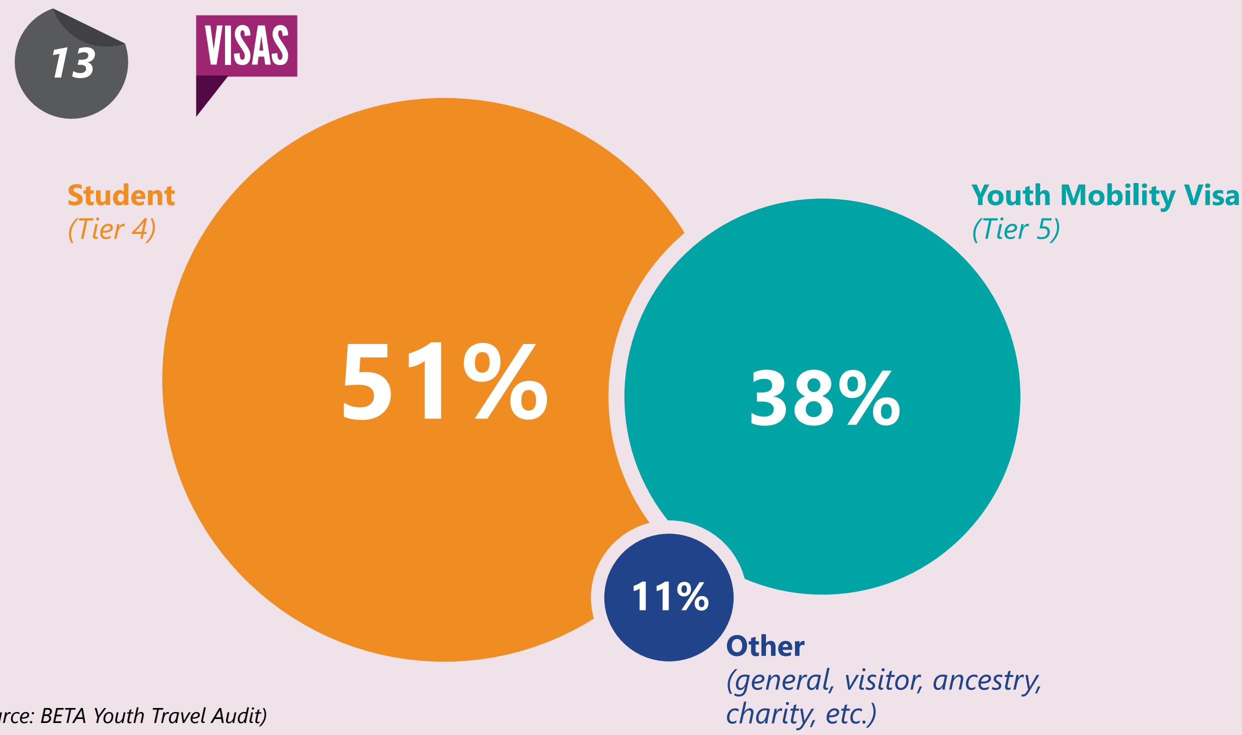
The process of getting in to the UK from an international traveller's perspective provides a clear indication of how much help the government is providing to the tourist trade. The access procedure might not hinder the initial decision-making process but it may well prohibit a traveller returning or recommending the UK to fellow travellers.

THE VISA PROCESS IS RELATIVELY STRAIGHTFORWARD ...

FOR THOSE WHO CAN GET THEM

Many young travellers who choose to visit the UK – whether for study reasons, with the intention to work or purely for leisure – are obliged to obtain a visa before entering the country. This is not as much of a hindrance as might be expected and amongst those who need a visa, many found it a relatively simple process – indeed, 42% of young travellers explicitly said they found it a simple and straightforward process.

Fig 13: Visas



(Source: BETA Youth Travel Audit)

source: Shutterstock © FotograFFF

US citizens were most likely to agree with this, with 66% saying the process was quick and straightforward along with Australians (47%) and Indians (43%). Brazilian visitors were less inclined to agree with only 17% saying it was a straightforward process along with South Africans (18%), Malaysians (32%) and Pakistanis (33%).

Half of young travellers who require a visa come to the UK on a student visa whilst 35% hold a Youth Mobility visa which allows them to work, study and travel around the UK for up to two years. However, not all young travellers have access the Youth Mobility visa as only a handful of countries participate in the scheme. The UK has a limit on how many Youth Mobility visas it issues, with the largest allocation, 35,000, going to young Australians.

Other countries that take part in this scheme:

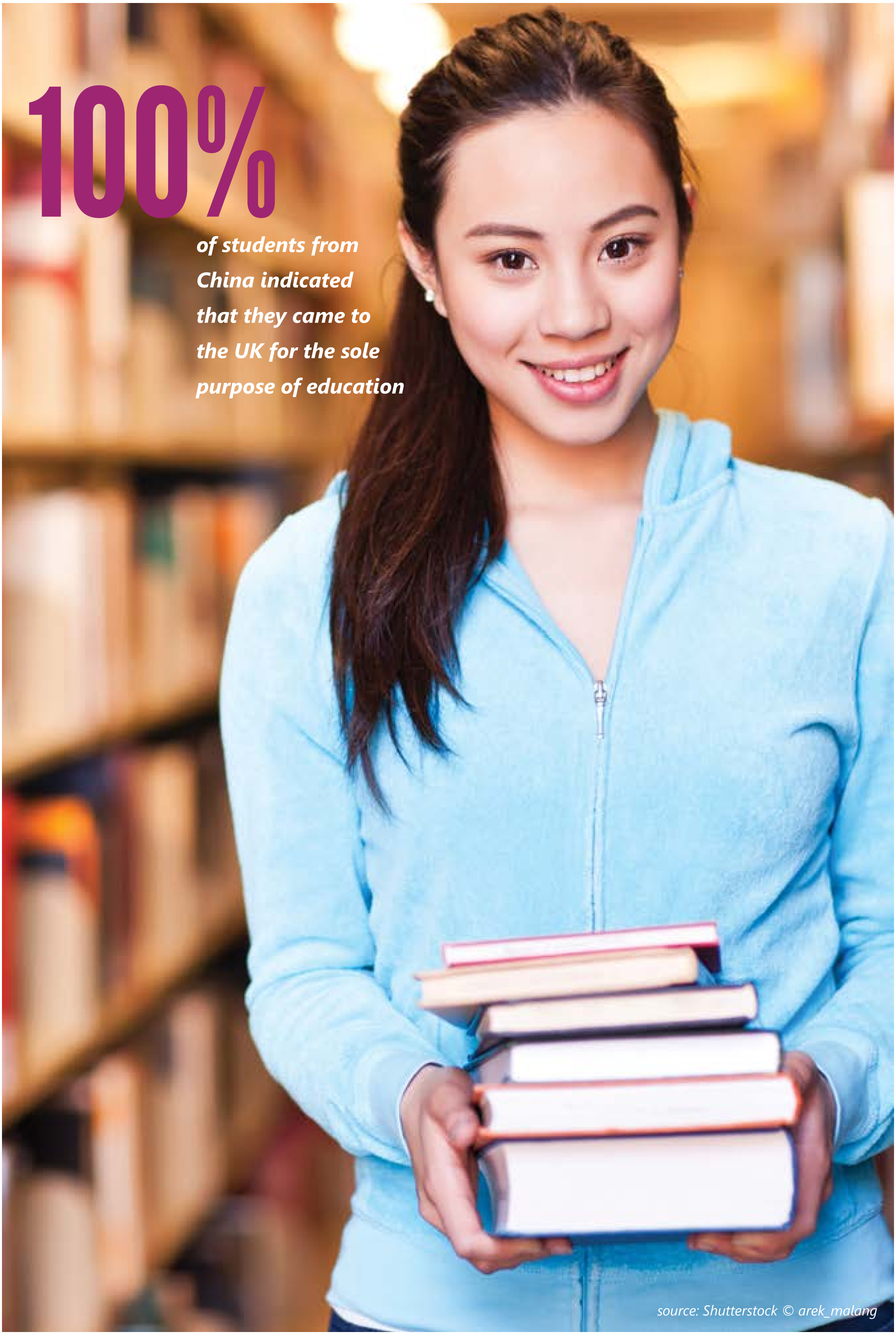
- New Zealand – 10,000 places
- Canada – 5,500 places
- Japan, Monaco, Republic of Korea and Taiwan 1,000 places each.

Other youth travellers come to the country with ancestry visas or sponsored by an employer.

The experience of applying and obtaining a visa is far from hassle-free. Some of the problems that young applicants in our study highlighted include the following:

• ***Cost:*** Nearly 50% of young travellers feel that the cost is high. This feeling was especially prominent amongst backpackers on a tight budget.

• ***Unexpected travel:*** Other aspects that usually add to the cost include travelling to major cities in order to obtain correct documentation. This was a complaint made mainly by Australians but also Canadians and US citizens, possibly due to the size of their countries.



source: Shutterstock © arek_malang

• ***Too little, too late:*** Although 66% of US travellers coming to the UK agree that the process is relatively simple and straightforward, they also feel it is restrictive considering the special relationship shared by the UK and the USA and, rightly or wrongly, are under the impression that other nationalities have an easier time entering the country than they do. They also highlighted issues with not being able to apply for their visa until close to departure date which resulted in them feeling anxious or stressed.

• ***The need to attract more Asian students:*** Amongst the respondents to our survey, there was a disproportionately low number of Asian travellers coming to the UK – only 11% (indeed the International Passenger Survey Data puts the figure for youth travellers from Asia at closer to 5%)[4] – and while this could be due to a number of reasons, one that is highlighted in our survey is the difficulty in visa applications and expense that students from Asia face when considering visiting the UK.

Research from 2009 showed that more than a third of online respondents from China, Russia, and India perceive some difficulty in getting a visa to visit the UK. They are also far more likely to agree (49%) than disagree (16%) that getting a visa to visit the UK is expensive. 42% agreed that the cost and trouble of getting a British visa meant that they are more likely to travel elsewhere.[5]

British education is highly regarded in many Asian countries: 100% of students from China and 56% from India indicated that they came to the UK for the sole purpose of education. Those Asian students that do come to the UK express concern that others may not have access to the same opportunities due to the stringent process and elevated cost.

Changes in visa rules stating that students can only stay on to work if they land jobs earning at least £20,000 came into effect in April 2012. This has also had a detrimental effect on the number of Asian students arriving in the UK as without the ability to work after graduation, it is almost impossible for students to pay back the loans they have taken out to pay for expensive tuition fees in the UK. The London School of Economics has already reported that applications from South Asia have dropped by 20% since the new rules were brought in.[6]

4 International Passenger Survey, Office of National Statistics (2012)

5 Welcome and the Visitor Experience, VisitBritain (2009)

6 Written evidence from the London School of Economics, Public Accounts Committee (2012)

WHERE DO THEY GO?

LONDON REMAINS THE MAIN EVENT

The UK's capital hasn't lost any of its appeal or glamour in recent years, with 56% of young travellers heading straight to London to make it their base and a further 27% visiting at some point during their UK visit. Although youth travellers and general tourists to the UK are both drawn to both England's and Scotland's capital cities, youth travellers visit trendy Brighton and cultural Bath while older tourists - that is, tourists aged 35 and older – are more likely to head north.

Where will you visit during your time in the UK
(Source: BETA Youth Travel Audit)

YOUNG WORKERS SPEND WHAT THEY EARN ON EUROPEAN TRAVEL

When they work in the UK, young travellers who come from further afield are more likely to use their hard-earned money to explore the rest of Europe than they are to see more of the UK. However European visitors are keen to explore the country and see the rural areas of the UK as well as the cities.

THE YOUTH TRAVELLER IS URBAN

Although London with its bright lights and entertainment attracts the largest numbers of young travellers, a high proportion of them venture far beyond to explore the rest of the UK. They want to see cities and experience a local culture. They want to see how people live and experience the excitement that comes with big city living. Young travellers want to make the most of the rich history the UK has to offer and high on the list of must-see cities are the university cities of Oxford and Cambridge with 48% and 38% of young visitors respectively travelling to visit them. Over half of young travellers make their way to Edinburgh but they are also drawn to Glasgow (34%) and, on a lesser scale, to Aberdeen (9%). Other cities that attract the youth traveller market are Manchester, Bath, Liverpool and Birmingham.

As well as being attracted to the larger urban concentrations, young travellers want to see rural areas with many visiting Stonehenge, the Cotswolds, the Lake District and the Highlands.

THE UK IS EASY TO GET AROUND ONCE THEY GET HERE

75% state that moving around cities and between cities in the UK is very easy scoring ease of travel over 4.5 out of 5. Youth travellers from the US are most likely to get around the UK with 33% of Americans say that the money they earn in the UK they spend on travel within the UK.

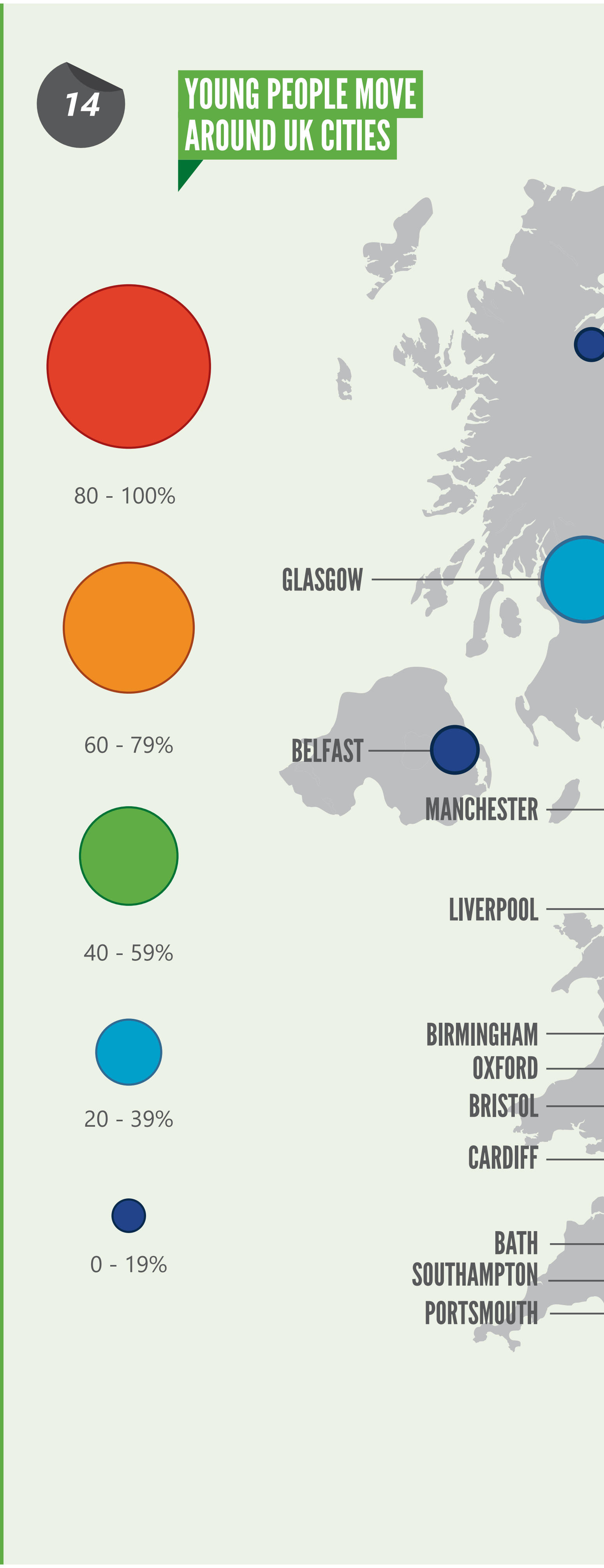
THE UK IS 'BASE-CAMP' FOR EUROPEAN EXPLORATION

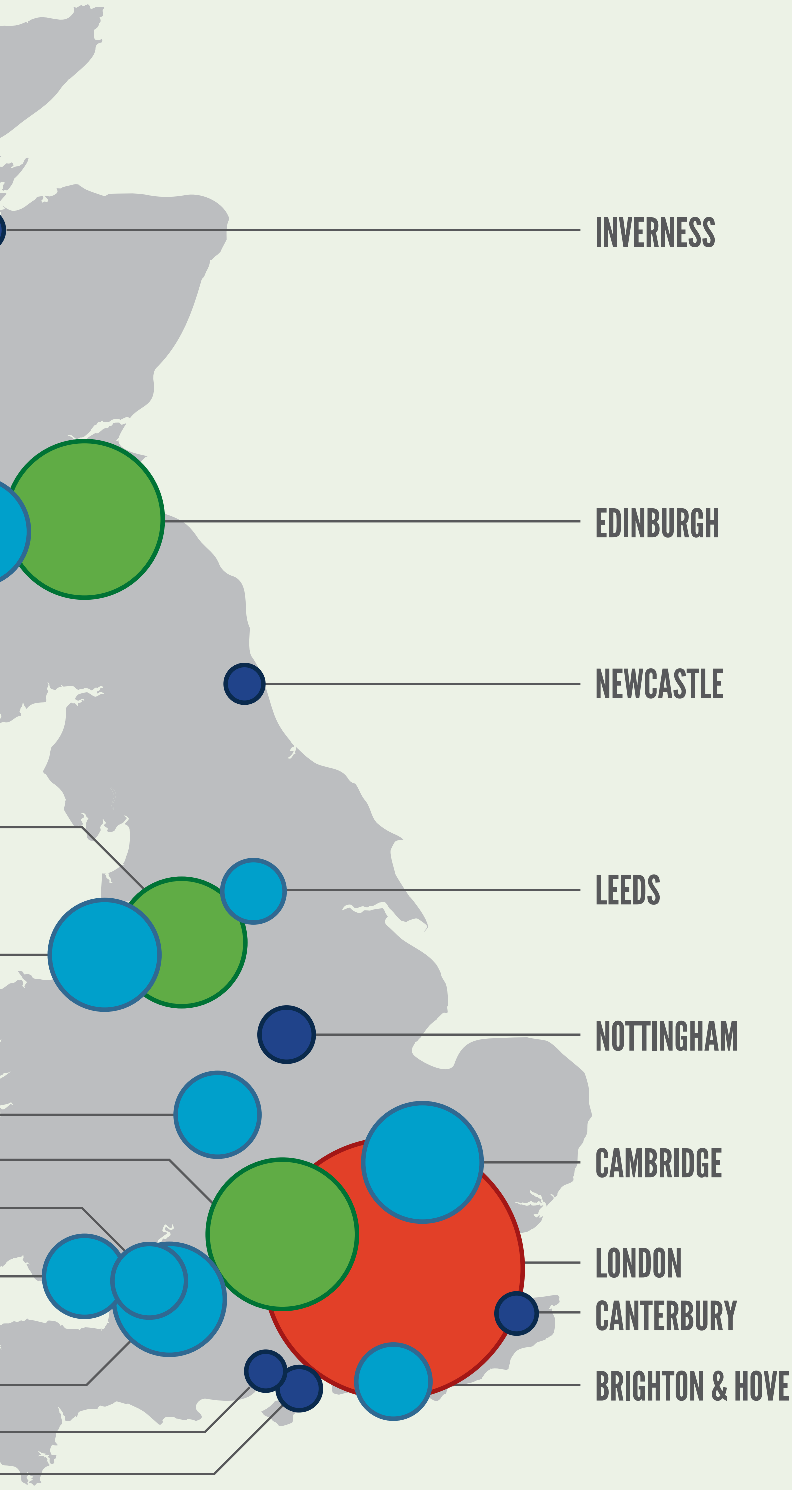
Antipodeans are amongst the travellers most likely to feel the urge to see the rest of the Europe: 51% of New Zealanders and 40% of Australians say they spend most of their money on travelling to other European countries.

64% of young travellers to the UK use it as a base for short trips to Europe and the countries they most visit for leisure are all major European countries: France, Italy, Spain, Germany and Ireland.

SEEING ALL OF LONDON IS A CHALLENGE

83% of young visitors to the UK feel they cannot bypass a visit to the capital whether or not they decide to be based there for the duration of their stay. They move around the city with ease and explore the different areas. But, despite the capital being the biggest draw, other urban concentrations across the UK also attract young travellers ***(see fig. 14).***





(Source: BETA Youth Travel Audit)

City League Table

Top 20 cities visited	%
London	83
Edinburgh	50.2
Oxford	47.9
Manchester	40.9
Cambridge	38
Bath	35.6
Liverpool	35.2
Glasgow	34.8
Birmingham	26.9
Cardiff	26
Brighton and Hove	23.8
Bristol	23.6
Leeds	20
Belfast	19.1
Nottingham	17.4
Portsmouth	13.9
Inverness	13
Canterbury	12.9
Southampton	12.5
Newcastle upon Tyne	12.1

THE UK COUNTRYSIDE HAS APPEAL

Rural UK is not forgotten either with 11% of all young travellers mentioning places such as the Lake District, the Cotswolds, the Highlands and the Brecon Beacons.

WHAT DO THEY DO?

It is understandable that the vast majority of 18-34 year olds spend most of their money on accommodation; but what is less well-known is how hard they work to get here in the first place. This makes them spend their money very selectively once they arrive.

HIGH SPENDERS

Young travellers all tend to spend the majority of their money on accommodation and bills but naturally entertainment, food and drink are also priorities for young people visiting the UK. After they have paid for the basics, they spend their money visiting major tourist landmarks and on experiencing the nightlife that London and other major cities have to offer. They live for the moment and want to make the most of being in the UK so are less inclined to use the money they have earned to put aside as savings or for when they return home.

THEY COME WITH MONEY TO SPEND

Amongst 18-34 year olds, the average spend tends to be between £16-60 per day. This covers accommodation, travel, food and entertainment. They have a mean spending power of £35 per day, equating to £245 a week.

Fig. 15: Tourist spend per age demographic

The junior traveller (11-17 years old) spends far less – usually between £5-15 a day. As this age group tends to stay with host families, typically living in the suburbs of major cities and attending local language schools, the money that the younger traveller will spend often remains within the community they are staying in which in turn means their visit is likely to have a localised economic impact.

15

TOURIST SPEND PER AGE DEMOGRAPHIC

(Source: International Passenger Survey, Office for National Statistics)

The graph shows information taken from the 2012 International Passenger Survey Data, indicating that although the daily spend by the 16-24 age group is lower than that of others, their visits are longer and therefore make a valuable contribution to tourism in the UK.

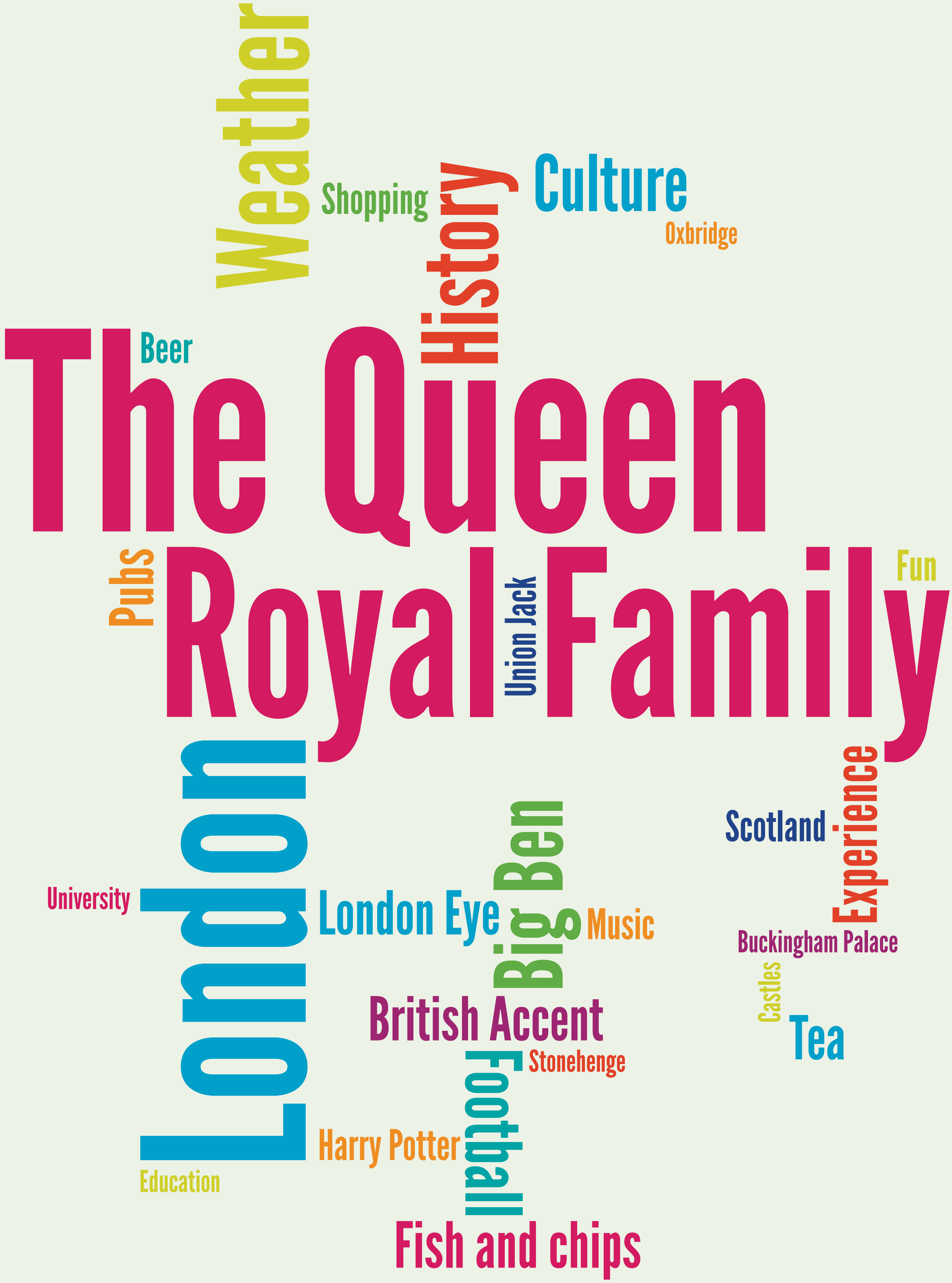
THE BIG EVENTS KEEP THE UK FRONT OF MIND

Events such as the Olympics, the Queen's Jubilee celebrations and the Royal Wedding are powerful as they keep the UK in the global eye but the UK's breadth of appeal means that there is no single event that makes it a must-visit destination but a combination of factors. There is an awareness of events taking place but none of them are the single definitive factor.

THE ATTRACTION OF THE UK FAR EXCEEDS A SINGLE EVENT

A combination of reputation, friends' recommendations, the English language, history, culture, heritage and the modern portrayal of the UK in film, TV and the media all contribute to create a very positive image.

©VisitBritain / Pawel Libera



Name the first 3 things that come to mind when you think of the UK
(Source: BETA Youth Travel Audit)

THE PROFILE OF THE YOUTH TRAVELLER

FACT FILE

Duration of the fieldwork: Five weeks between February and March 2013

Sample size: 4,152

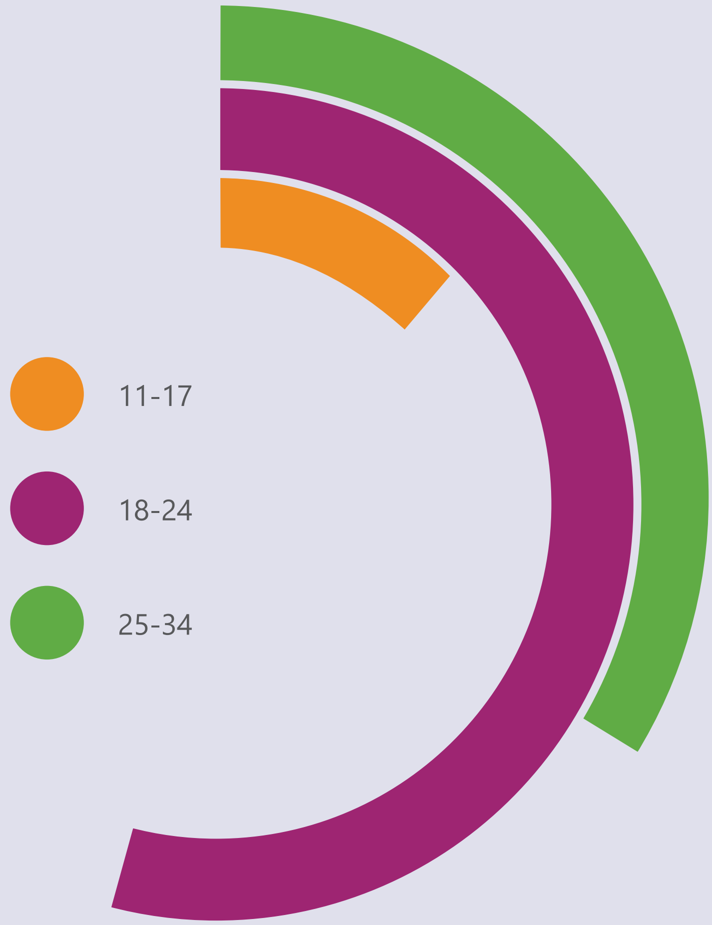
Fig. 16: Age breakdown of respondents

Fig. 17: Where they stay

Fig. 18: Where they came from

16

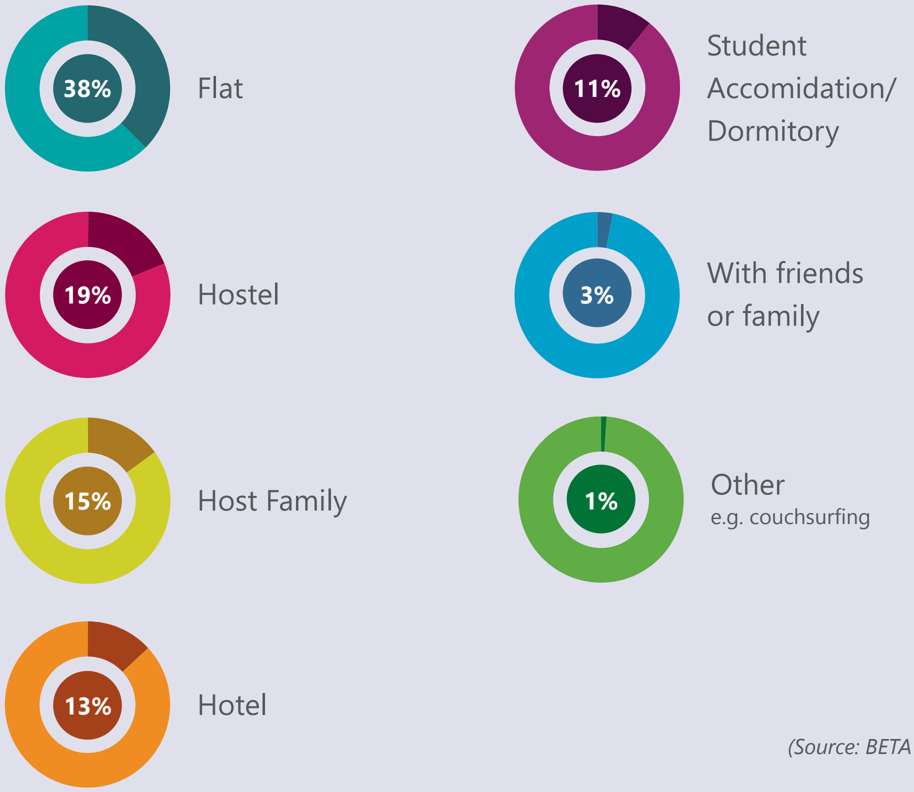
AGE BREAKDOWN OF RESPONDENTS



(Source: BETA Youth Travel Audit)

17

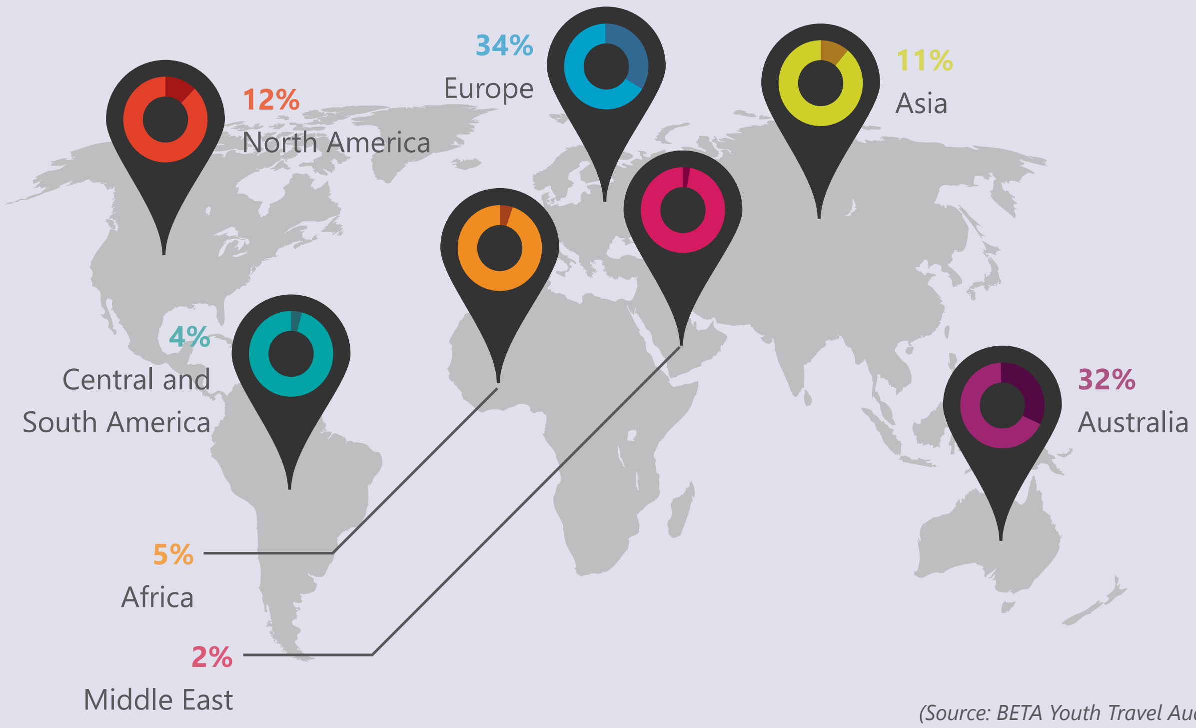
WHERE THEY STAY



(Source: BETA Youth Travel Audit)

18

WHERE THEY CAME FROM

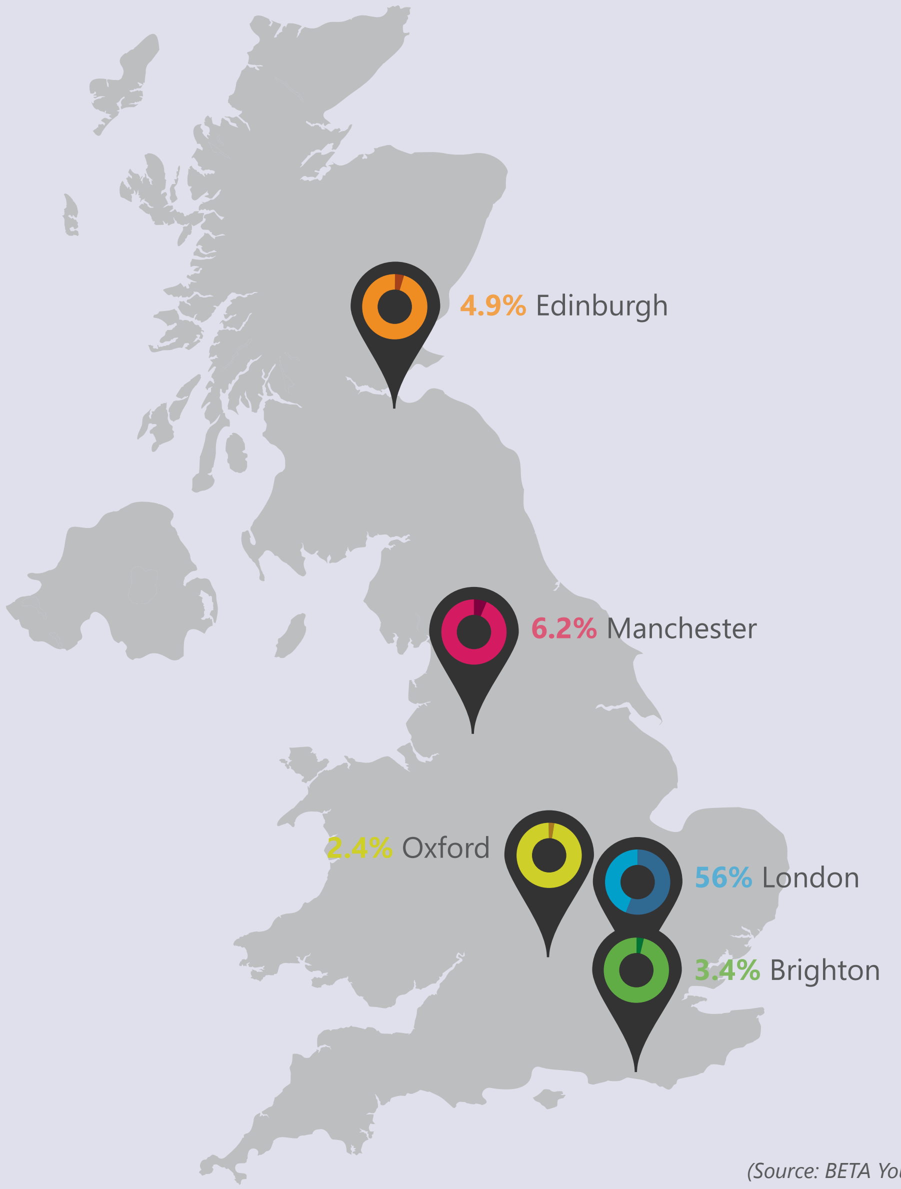


(Source: BETA Youth Travel Audit)

source: Shutterstock © carballo

19

FINAL DESTINATION CITY WHILST IN THE UK

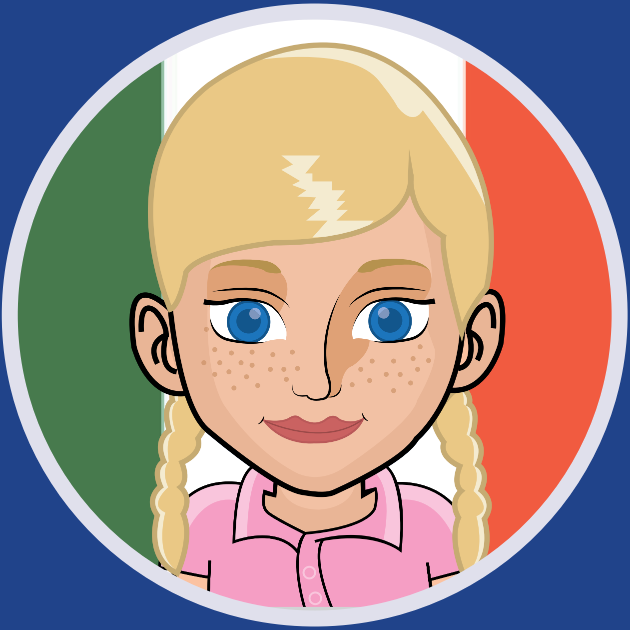


(Source: BETA Youth Travel Audit)

Fig. 19: Final Destination city whilst in the UK

We segmented the youth traveller market into four distinct categories based on their age, motivations, activities they engage in when in the UK and how long they remain in the country. The categories we identified are the following:

- **THE 'JUNIOR' TRAVELLER**
- **THE 'STUDENT' TRAVELLER**
- **THE 'BACKPACKER'**
- **THE 'WORKING' TRAVELLER**



THE 'JUNIOR' TRAVELLER

LANGUAGE LEARNING, CULTURE AND HERITAGE EXPLORATION ARE THE KEY PURPOSES

AGE
11-17

GENDER
80% female

FROM
26% Italy, **11%** Russia, **11%** Spain, **7%** France, **5%** China

ACCOMMODATION TYPE
with host families

DESTINATION
34% London, **9%** Oxford, **9%** Brighton, **4%** Cambridge, **3%** Aberdeen

SPEND
£5-15 per day

LENGTH OF STAY
less than two months

MAIN REASON FOR TRIP
To improve English language skills and general tourism


source: Shutterstock © YanLev

The junior traveller is typically female and comes to the UK to improve her English in order to gain better grades when back at school in her home country in Southern Europe, Russia or China. She comes to the UK for less than two months and stays with a host family in the suburbs of a major city, typically London.

She comes with friends, as part of an organised group, and British culture is a big influence on her choice (although she also considers the US before booking her trip). She and her parents choose the UK over the USA because, for some, it is cheaper to reach and closer to home.

THE 'STUDENT' TRAVELLER

STUDY IS THE KEY PURPOSE

AGE

18-24

GENDER

71% female

FROM

12% USA, **8%** Australia,
8% Malaysia, **5%** Hong Kong,
5% Bulgaria, **4%** Romania,
3% China , **3%** Germany,
3% Poland, **2%** Spain,
2% Canada, **2%** France,
2% Brazil, **2%** Greece,
2% Ireland, **2%** Italy

ACCOMMODATION TYPE

rented flats/student digs

DESTINATION

42% London,
6% Edinburgh,
13% Manchester,
5% Portsmouth

SPEND

£16-30 per day

LENGTH OF STAY

48% stay for over a year

MAIN REASON FOR TRIP

to study towards or complete an undergraduate degree

source: Shutterstock © arek_malang

The student traveller comes from outside Europe, mainly from the USA but also from Asian countries such as Hong Kong, Malaysia and China and is female. Previous larger studies[1] have shown that Asian students make up a high percentage of higher education foreign students (around 40%) but in our survey of young travellers, they represent approximately 20% of all undergraduates. The student traveller stays between one and three years in the UK to complete at least some, if not all of her undergraduate degree. Academic reputation and the opportunity to enhance her experience of travel have both equally influenced her decision to study in the UK.

She gravitates towards the red-brick universities of London, Manchester and Edinburgh and stays in rented flats with other students. Her normal spend will usually be between £16-30 per day which includes the cost of her accommodation.

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1 *Britain's Shining Opportunity, BETA (2011)*

THE 'BACKPACKING' TRAVELLER

LEISURE AND EXPLORATION ARE THE PRIMARY MOTIVATION

AGE
18-24

GENDER
female

FROM
56% Australia,
12% New Zealand,
8% USA, **6%** Canada,
5% Sweden, **3%** South Africa

ACCOMODATION TYPE
youth hostels

DESTINATION
73% London,
9% Edinburgh

SPEND
£31-45

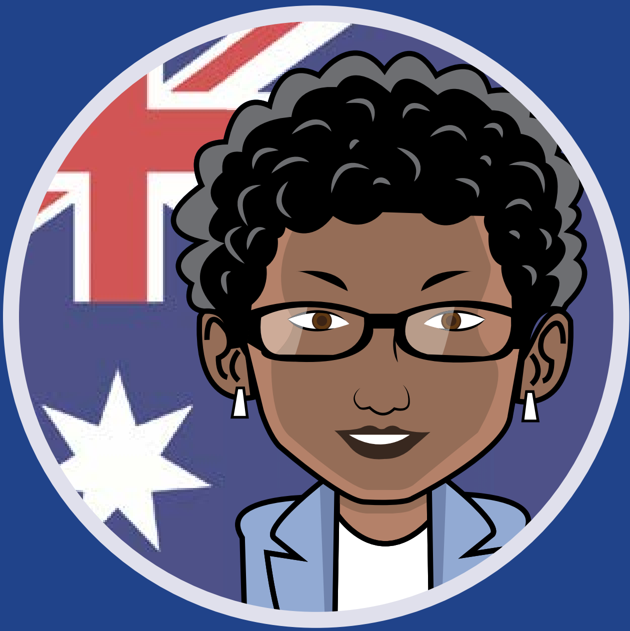
LENGTH OF STAY
less than two months

MAIN REASON FOR TRIP
a 'culture vulture':
here to sample the UK
culture and lifestyle

source: Shutterstock © Efired

The backpacking traveller is also female and comes to the UK to experience a taste of life in the UK, see the sights, have fun and revel in the entertainment that both the English and Scottish capital cities have to offer.

She comes from Australia, New Zealand or North America and chooses hostels for her stay in the UK, which tends to be for less than two months. Because she doesn't intend to stay for an extended period and is focussed on enjoying what the UK has to offer in terms of tourist attractions and entertainment, her spend is slightly higher, with an average spend of £31-45 per day: money she has saved up especially for this trip.



THE 'WORKING' TRAVELLER

WORK AND FUN ARE THE KEY PURPOSE

AGE

25-35

GENDER

79% female

FROM

27% Australia, **9%** US, **7%** New Zealand, **5%** Canada, **4%** Malaysia, **3%** Germany, **4%** Sweden, **2%** China, **2%** France, **2%** Hong Kong, **2%** Romania, **2%** South Africa, **2%** Spain

ACCOMMODATION TYPE

rented flats

DESTINATION

55% London, **8%** Edinburgh, **3%** Brighton, **3%** Portsmouth, **2%** Cambridge

SPEND

£16-60 per day

LENGTH OF STAY

1-3 years

MAIN REASON FOR TRIP

'edutainment' a mixture of entertainment, holiday and fun with education, work and life experience

source: Shutterstock © Rommel Canlas

The more independent, older traveller is also female and chooses to stay in the UK for a more extended period of between one to three years. She comes from Australia and during her visit, she is very likely to have between two and four visitors stay with her in her rented flat or apartment.

Although she works during most of her stay in the UK, her main aim is to have fun while she is in the country.

She tends to have a full-time job in education, hospitality or retail. She is settled in her job and will have an average monthly salary of £1,000 during her stay in the UK. She uses her money to travel outside of the UK and to put towards entertainment costs as well as to pay for her accommodation. She stays in London and also considers other destinations when booking her trip to the UK, with France being top of the list.

On average, she spends £16-60 a day and uses a prepaid card for her purchases. Unlike her younger counterpart, she comes to the UK for its heritage as well as to soak up the British culture.

CONCLUSIONS

Whilst this particular segment of the travel market continues to buck the trend in terms of the global economy, it is evident that more could be done to accommodate the needs of younger international visitors to the UK.

The industry should also sit up and take note of a number of emerging trends identified in this study. In particular, the combination of the fact that almost ***all would recommend the UK to friends and family***, the highly influential role of friends and family on their decision-making and an overwhelming desire to return here is undeniable evidence of a ***powerful army of UK ambassadors***, just waiting to be harnessed. When you add the finishing touch that young travellers will, on average, bring a further ***two to four visitors over to the UK during their stay***, then there is an incredible opportunity for increasing the reach and appeal of the UK to overseas visitors in the youth travel sector and beyond.

Youth travellers give value to a destination over a lifetime, however, only 46% of young travellers that we surveyed felt that the culture in the UK was orientated towards young people and with ***over 300 million youth trips forecast per year by the year 2020***[1], we must work proactively with our partners promoting the UK to ensure that this is addressed within our global marketing of brand Great Britain. ***Youth, student and educational travel represents an enormous opportunity for the future growth of the UK travel and tourism industry*** as a whole and by reducing the barriers to growth and increasing the welcome to young travellers it has the potential to be one of the UK's largest exports.

Taking into account the traveller profiles and other key findings outlined in this report may enable the UK youth travel industry to continue successfully shaping the future of the sector and ensure that it continues to thrive and reflect the needs of young people who come to work, study or play so that **GREAT BRITAIN** continues to be at the *Heart of Global Youth Travel*.

1 UNWTO

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APPENDICES:

APPENDIX I: TRAVEL SURVEY DISTRIBUTORS

1066 COUNTRY MARKETING
ABC LANGUAGES
ANDERSON TOURS
ANGLO EDUCATIONAL SERVICES
ANGLOPHILES ACADEMIC
BETA
BOURNEMOUTH UNIVERSITY
BRITANNIA STUDENT SERVICES
BRITBOUND
BRITISH COUNCIL
BUNAC
CARDIFF UNIVERSITY
COURTAULD INSTITUTE OF ART (THE)
DURHAM UNIVERSITY
EQUITY POINT
ESL - LANGUAGE TRAVEL
EXPERIO LIFE
FLIGHT CENTRES
GAPYEAR.COM
HATTERS GROUP
HOMESTAY TECHNOLOGIES
HOSTELWORLD
ICEF
ISAACS HOSTELS
KING'S COLLEGE LONDON
LIVERPOOL VISION
LONDON & PARTNERS
LONDON COLLEGE OF FASHION
LONDON METROPOLITAN UNIVERSITY
LONDON SOUTH BANK UNIVERSITY
MADVENTURER
MIDDLESEX UNIVERSITY
MOUNTBATTEN INSTITUTE
NATIONAL UNION OF STUDENTS
PALMERS LODGE
PLYMOUTH UNIVERSITY
PROJECT INTERNATIONAL
QUEEN MARY, UNIVERSITY OF LONDON
RADICAL TRAVEL
REGENT'S COLLEGE STUDENT UNION
ROYAL HOLLOWAY, UNIVERSITY OF LONDON
SMART CITY HOSTELS
ST CHRISTOPHER'S INNS
STA TRAVEL
STS: SCHOOL TRAVEL SERVICE
STUDENT ROOM (THE)
STUDY LONDON
TOPDECK TRAVEL
TRAVLAW
UK COUNCIL FOR INTERNATIONAL STUDENT AFFAIRS
UMI DIGITAL
UMI HOTELS
UNIVERSITY OF ABERDEEN
UNIVERSITY OF BELFAST
UNIVERSITY OF BIRMINGHAM
UNIVERSITY OF BRADFORD
UNIVERSITY OF BRIGHTON
UNIVERSITY OF BRISTOL
UNIVERSITY OF CAMBRIDGE
UNIVERSITY OF DERBY
UNIVERSITY OF EAST ANGLIA
UNIVERSITY OF EAST LONDON
UNIVERSITY OF EDINBURGH
UNIVERSITY OF GLASGOW
UNIVERSITY OF HULL
UNIVERSITY OF LEICESTER
UNIVERSITY OF LIVERPOOL
UNIVERSITY OF LONDON INTERNATIONAL PROGRAMMES
UNIVERSITY OF MANCHESTER
UNIVERSITY OF NORWICH
UNIVERSITY OF NOTTINGHAM
UNIVERSITY OF OXFORD
UNIVERSITY OF SALFORD MANCHESTER
UNIVERSITY OF YORK
UNIVERSITY OF WESTMINSTER
VISITBRITAIN
WORLD NOMADS
YHA

APPENDIX II: LIST OF FIGURES AND DIAGRAMS AND INDEX

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