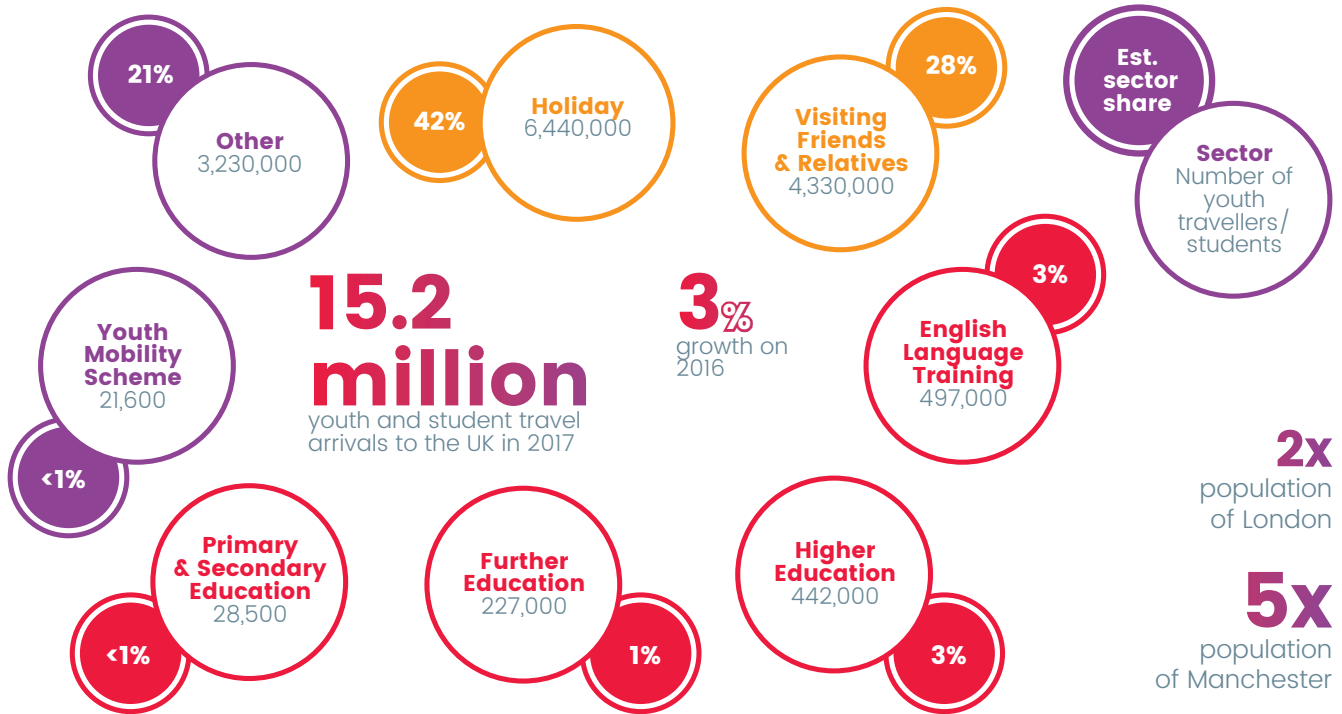


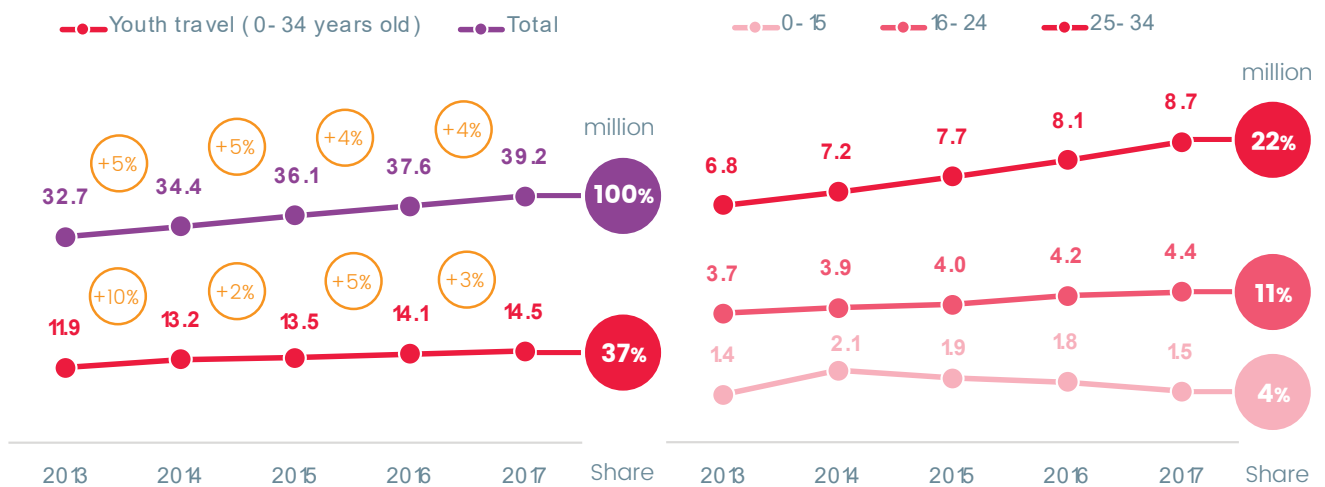


Youth Student & Educational Travel to the UK

MARKET SIZE



YOUTH TRAVEL ARRIVAL TRENDS



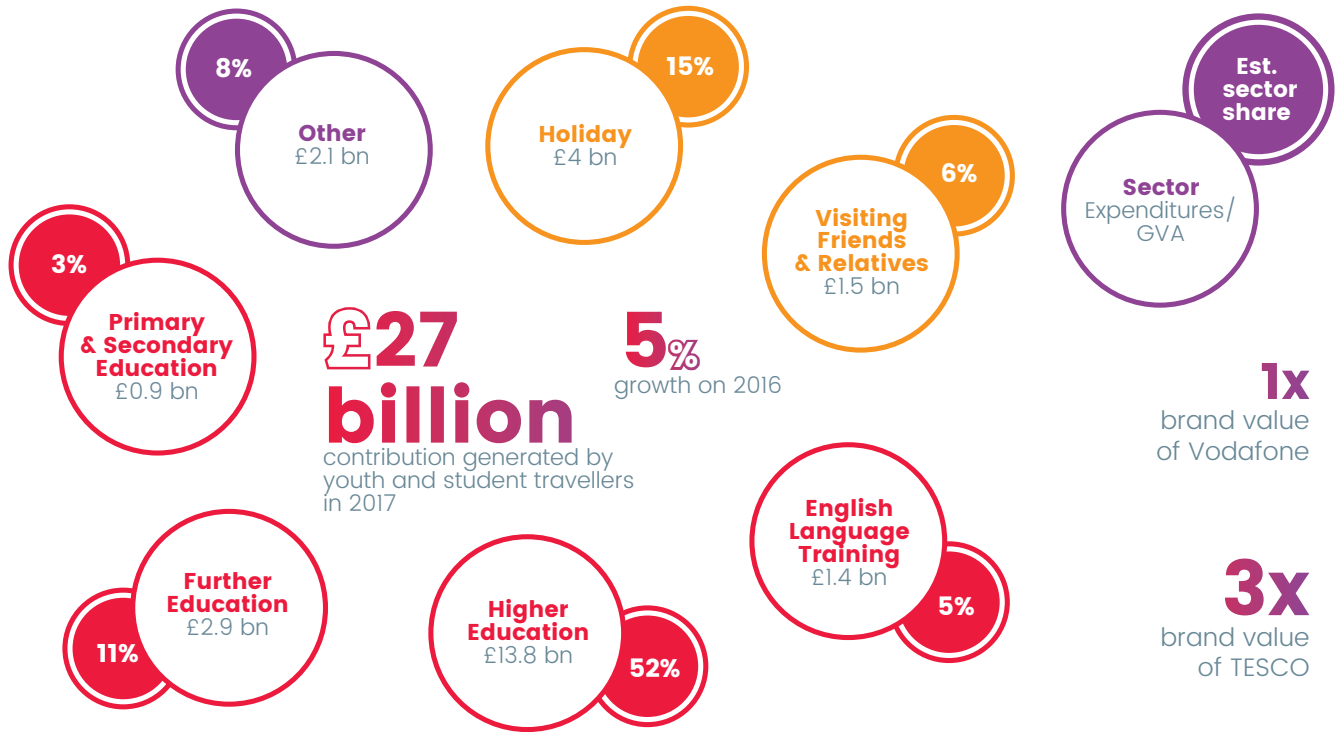
Note: Sector approach was selected due to under-representation of student numbers in IPS. The figures are rounded. Percentages do not add up to 100% due to rounding.

Source: English UK, 2018; HESA, 2018; Home Office, 2018; ISC, 2018; StudentMarketing, 2018; Office for National Statistics, 2018; BETA, 2017; British Council, 2009



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MARKET VALUE



* The measurement of the economic contribution generated by individual sectors varies to a great extent. The figure represents a minimum value based on GVA; where this was unavailable, data on expenditures was used.

JOBS SUPPORTED

265,000+ UK jobs

are supported by the international education sector

160,000

number of Royal Mail employees

150,000

number of Sainsbury's employees



Note: The figures are rounded.

Source: BETA/StudentMarketing, 2015; 2017; Capital Economics, 2018; English UK, 2018; HESA, 2018; Home Office, 2018; ISC, 2014, 2018; Kantar Millward Brown, 2018; Office for National Statistics, 2018; Universities UK, 2018; BETA, 2017; British Council, 2009