

SERVICES FOR
INTERNATIONAL
EDUCATION
MARKETING

CONFERENCE 2015

The UK ELT market - growth or decline?

John Knagg, British Council

Amy Baker, The PIE

Janette Donjon, Sunderland College

Jodie Gray, English UK

Richard Day, English in Chester





STUDENT STATISTICS REPORT 2014

ENGLISH UK

AIMS & OBJECTIVES

Mission: To promote and support UK ELT

Aims: To help English UK (EUK) members and the association to make well-informed business decisions.

To gain a better understanding of development in a wide array of countries

Objectives: To improve our provision of sophisticated, robust market intelligence

METHODOLOGY

Data drawn from

- EUK annual member declarations 2004 – 2014
- StudentMarketing's data on the global market for ELT

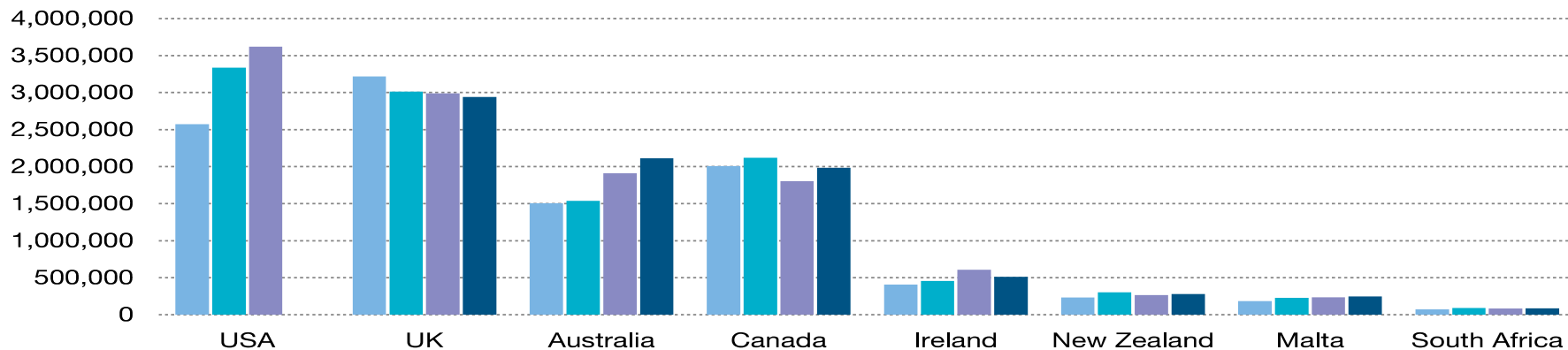
Data limitations

- The number of centres in EUK membership fluctuates
- EUK's private and state sector members provide their student figures in different ways

A student week is defined as one student taking 10 or more contact hours in one week.

GLOBAL PERSPECTIVE

Overview of ELT destinations (student weeks)

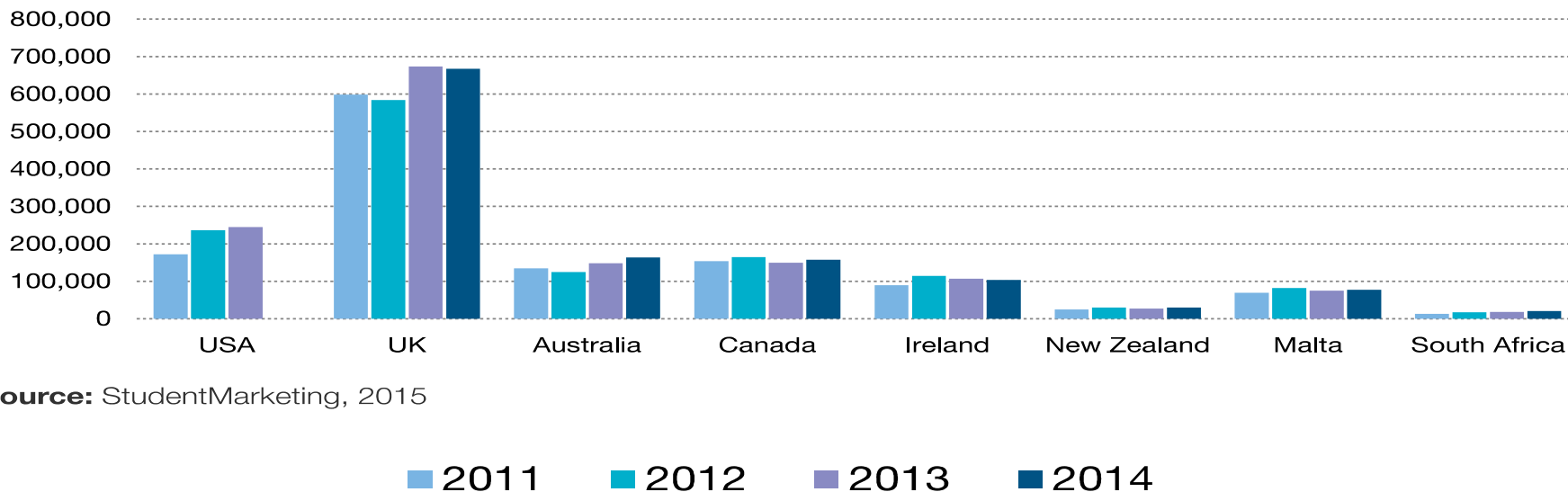


Source: StudentMarketing, 2015

■ 2011 ■ 2012 ■ 2013 ■ 2014

GLOBAL PERSPECTIVE

Overview of ELT destinations (student weeks)



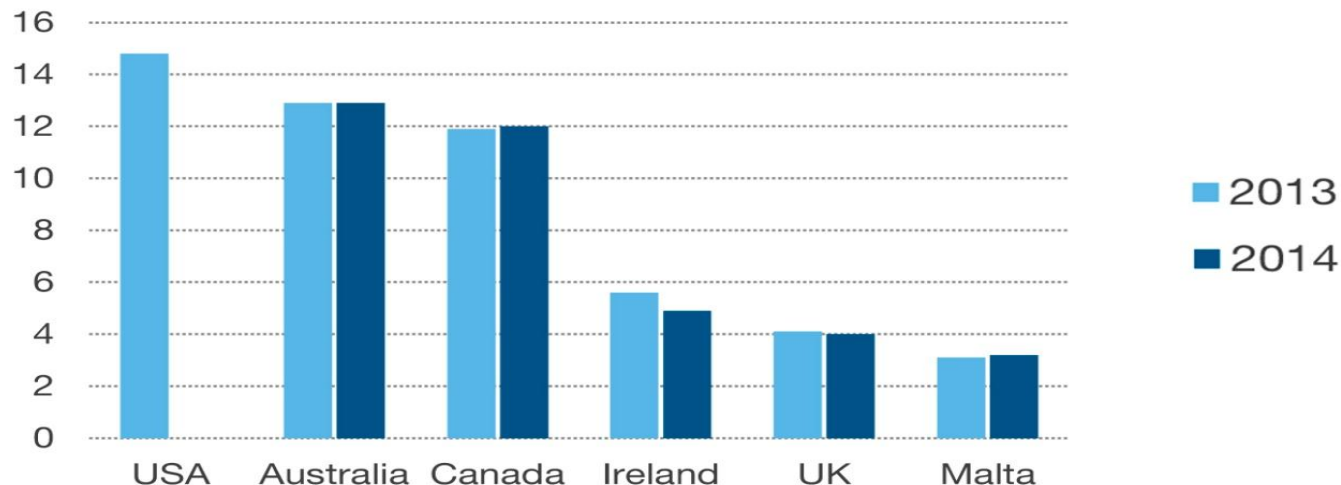
Source: StudentMarketing, 2015

GLOBAL PERSPECTIVE

- 8 top destinations: 1.44 million students
- USA: a strong pathway market
- UK: 2nd for student weeks, 1st student numbers
- Australia: 10% growth driven by demand from China and India
- Canada: students numbers up 6%
- Ireland: growing proportion of juniors
- Malta and South Africa: below 2.5%
- New Zealand: national marketing likely to increase share in the near future

GLOBAL PERSPECTIVE

Comparison of average length of stay (weeks)

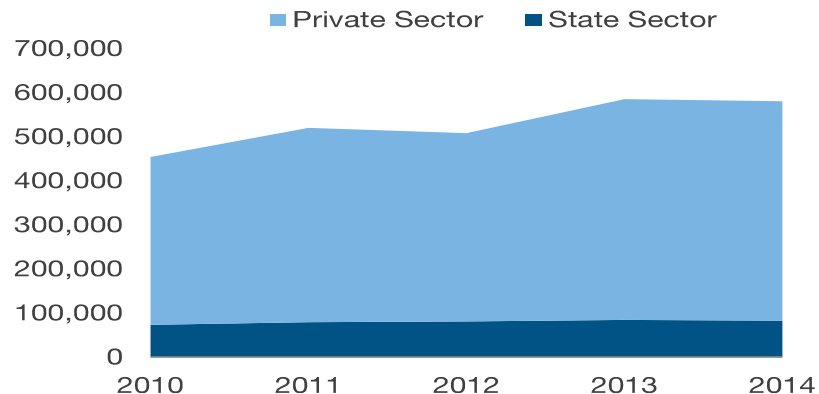


Source: IIE, 2015; Languages Canada, 2015; English Australia, 2015; MEI, 2015; English UK, 2015; NSO Malta, 2015

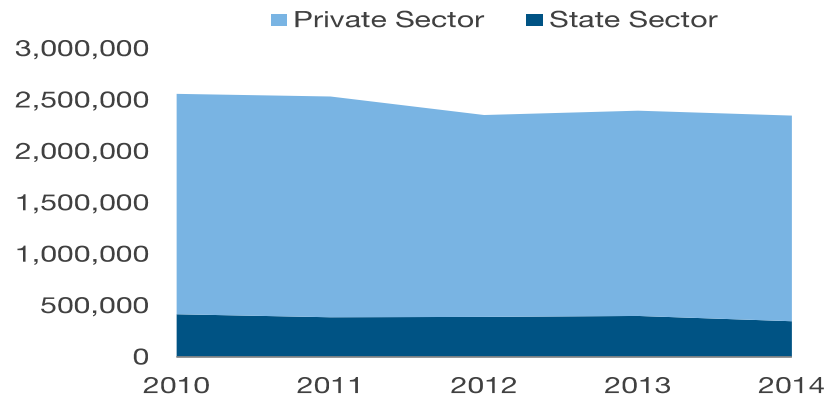
THE UK AT A GLANCE

Overall number of students and student weeks taught by English UK member centres

STUDENT NUMBERS



STUDENT WEEKS



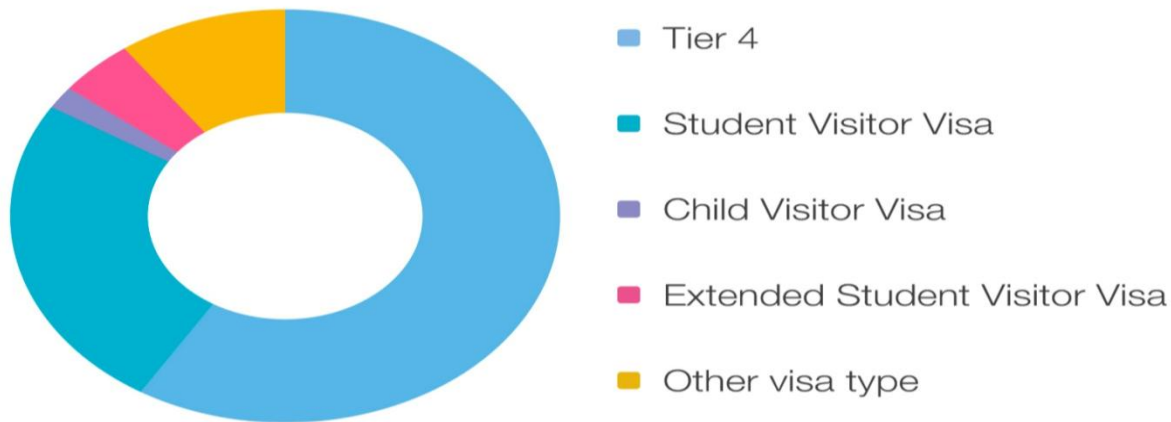
Source: English UK, 2010 - 2014

MARKET OVERVIEW

- 80 state members | 347,965 student weeks
- 14.95% decrease from 399,383 weeks in 2013
- Number of state centres declined by 4
- Average of 7.5 visa refusals per centre
- 59% were Tier 4 students

MARKET OVERVIEW

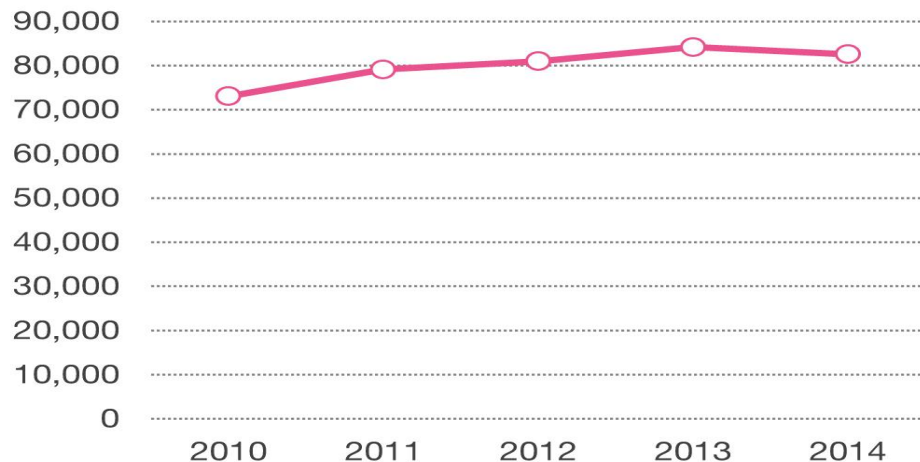
Student numbers by visa type



Source: English UK, 2014

MARKET OVERVIEW

State sector student numbers



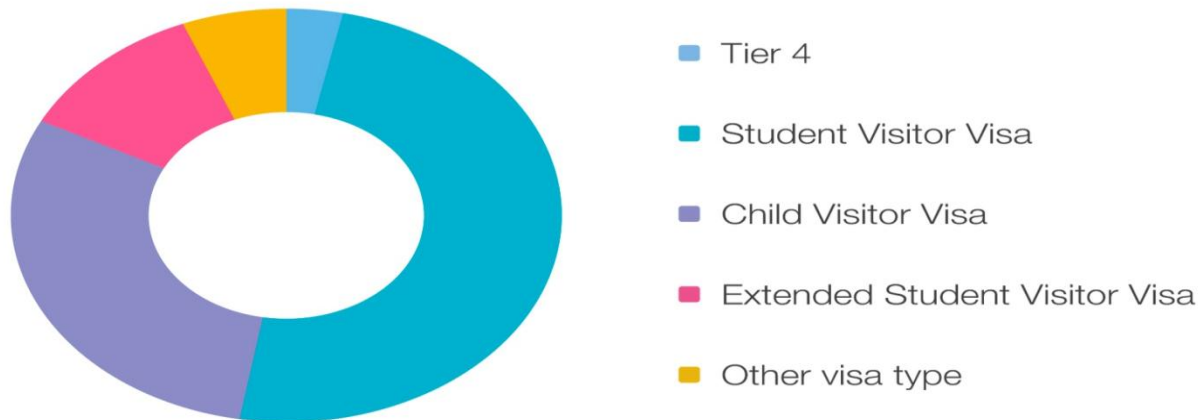
Source: English UK, 2010 - 2014

MARKET OVERVIEW

- 399 private members | 498,072 students
- 2,00,151 student weeks
- Over 80% of accredited private sector centres are English UK members
- Juniors: average/centre = 1,848 weeks | 891 students
- Adults: average/centre = 4,801 weeks | 835 students
- Primarily Student Visitor Visas
- Average of 6.2 visa refusals per centre.

MARKET OVERVIEW

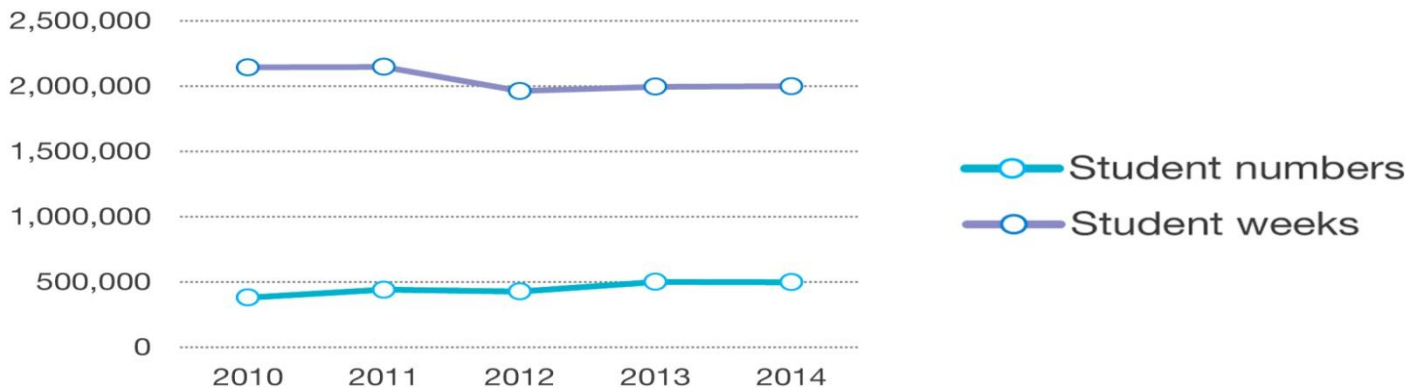
Student numbers by visa type



Source: English UK, 2014

MARKET OVERVIEW

Private sector student numbers

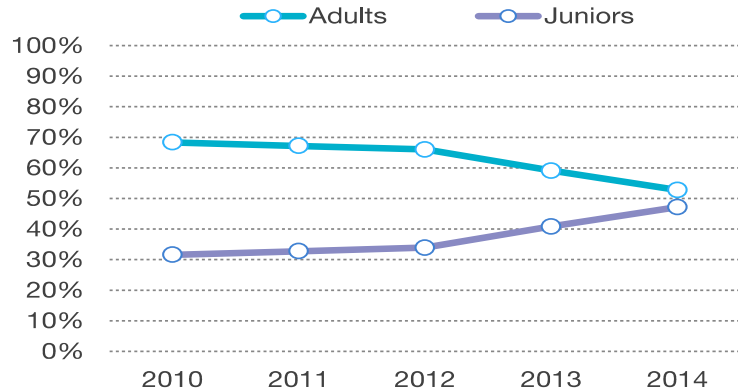


Source: English UK, 2010 - 2014

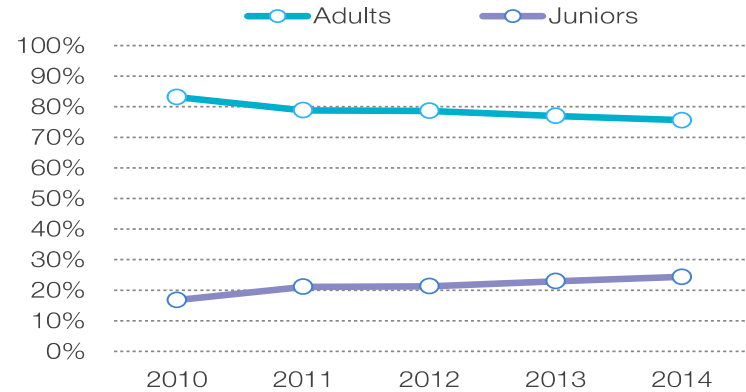
ADULT VS JUNIOR SEGMENT

Share of adults and junior out of the total number of students and student weeks in the UK (%)

STUDENT NUMBERS



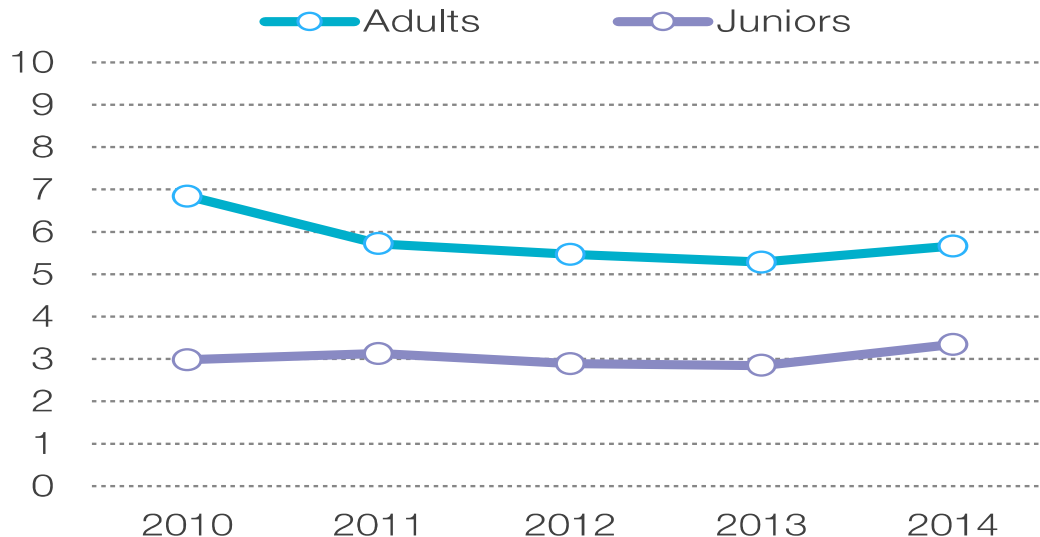
STUDENT WEEKS



Source: English UK, 2010 - 2014

ADULT VS JUNIOR SEGMENT

Average length of stay (weeks)



Source: English UK, 2010 - 2014

SOURCE REGIONS

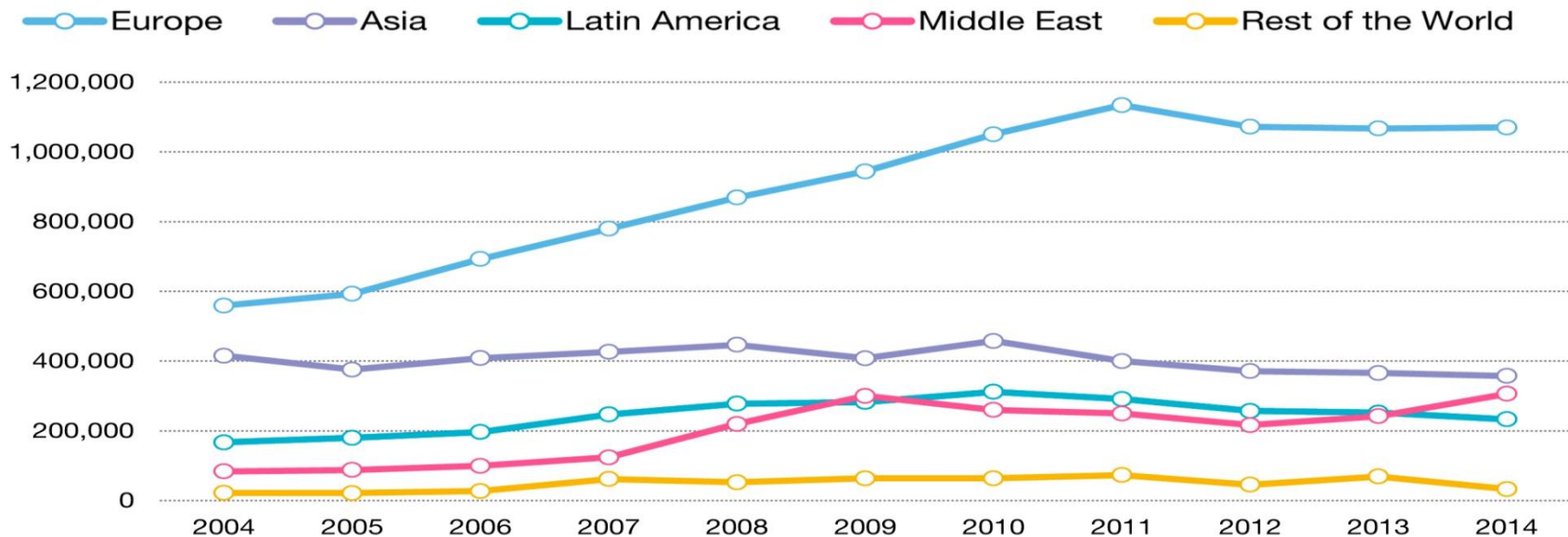
Number of student weeks, students and average length of stay by source region (2014)

Rank	Source region	Student weeks	% of total weeks	Student numbers	% of total students	Average length of stay (weeks)
1	Western Europe	887,306	44.4%	316,190	63.5%	3.1
2	Asia	357,547	17.9%	55,317	11.1%	6.6
3	Middle East	306,133	15.3%	27,837	5.6%	8.6
4	Latin America	233,283	11.7%	35,670	7.2%	7.3
5	Eastern Europe	182,794	9.1%	58,809	11.8%	3.8
6	Africa	31,460	1.6%	3,781	0.8%	7.7
7	North America	1,549	0.1%	446	0.1%	3.3
8	Australasia	79	< 0.01%	22	< 0.01%	3.5

Source: English UK, 2014

SOURCE REGIONS

Number of student weeks by source region (2004-2014)



Source: English UK, 2004 - 2014

SOURCE REGIONS

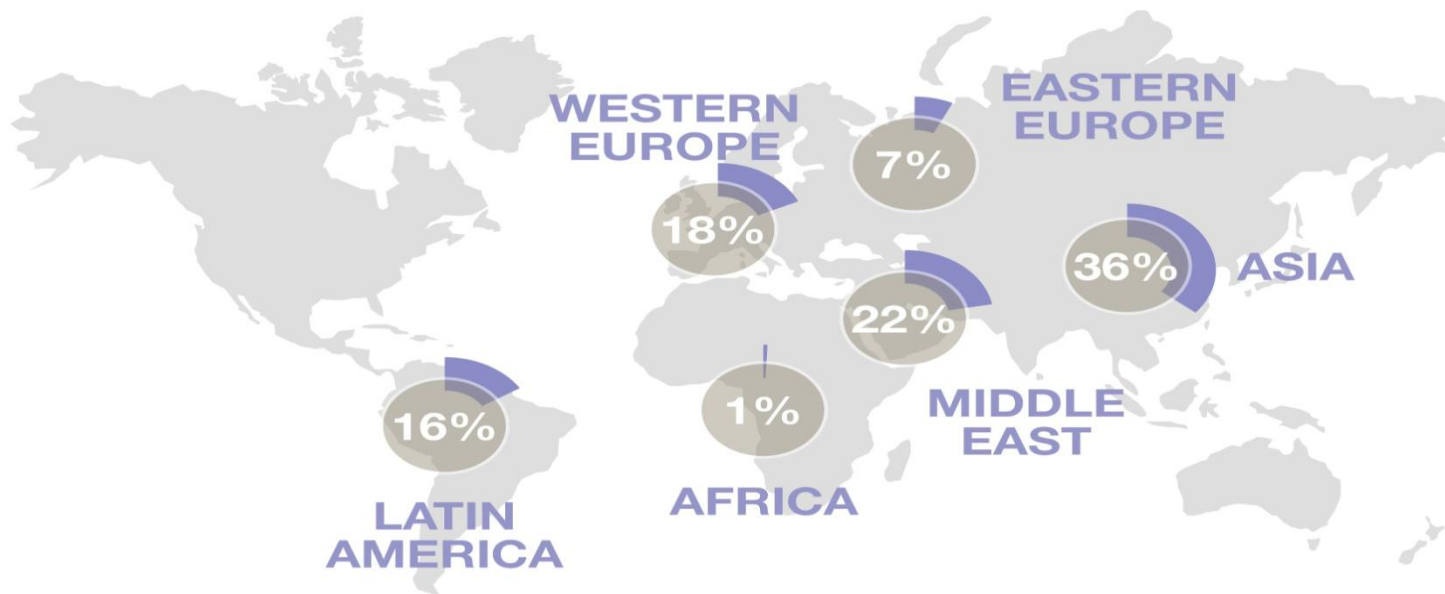
Source region market shares (UK ELT, student weeks, 2014)



Source: English UK, 2014

SOURCE REGIONS

Source region market shares (global ELT, student weeks, 2013)



Source: StudentMarketing, 2015

SOURCE REGIONS

Number of student weeks, students and average length of stay by source market (2014)

Rank	Source market	Student weeks	% of total weeks	Student numbers	% of total students	Average length of stay (weeks)
1	Italy	303,981	15.20%	128,881	25.88%	2.4
2	Spain	152,135	7.61%	46,981	9.43%	3.2
3	Saudi Arabia	124,215	6.21%	11,402	2.29%	10.9
4	France	107,823	5.39%	41,796	8.39%	2.6
5	Korea	92,996	4.65%	6,482	1.30%	14.3
6	Russia	92,003	4.60%	31,142	6.25%	3.0
7	Libya	90,869	4.54%	6,163	1.24%	14.7
8	Turkey	90,691	4.53%	13,117	2.63%	6.9
9	Japan	88,677	4.43%	14,890	2.99%	6.0
10	Switzerland	83,241	4.16%	19,723	3.96%	4.2

SOURCE REGIONS

Number of student weeks, students and average length of stay by source market (2014)

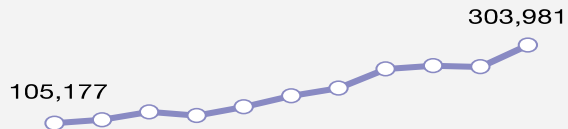
Rank	Source market	Student weeks	% of total weeks	Student numbers	% of total students	Average length of stay (weeks)
11	China	78,287	3.91%	18,407	3.70%	4.3
12	Brazil	77,735	3.89%	14,663	2.94%	5.3
13	Germany	73,089	3.65%	37,258	7.48%	2.0
14	Colombia	50,863	2.54%	4,164	0.84%	12.2
15	Thailand	43,215	2.16%	5,809	1.17%	7.4
16	Venezuela	37,875	1.89%	2,652	0.53%	14.3
17	Taiwan	28,435	1.42%	4,786	0.96%	5.9
18	Kuwait	25,049	1.25%	2,256	0.45%	11.1
19	Mexico	23,869	1.19%	6,292	1.26%	3.8
20	Oman	21,520	1.08%	2,125	0.43%	10.1

SOURCE REGIONS

Performance of selected source markets and the UK's estimated market share (student weeks, 2004 - 2014)

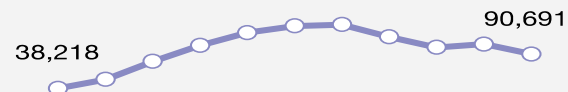
ITALY

68%



TURKEY

60%



SPAIN

56%



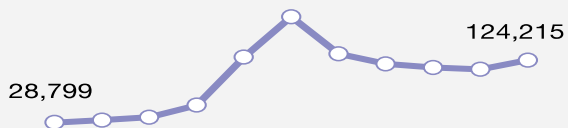
JAPAN

17%



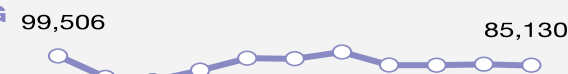
SAUDI ARABIA

9%



CHINA/HONG KONG

10%



PRIVATE SECTOR MEMBER CENTRES

SOURCE REGIONS

RUSSIA

61%



GERMANY

45%



BRAZIL

18%



MEXICO

17%



FRANCE

54%



THAILAND

21%



COLOMBIA

25%



VENEZUELA

22%



CONCLUSIONS

- The major trend of travelling abroad at a younger age is bringing new opportunities within the entire youth and student travel industry, and the UK seems to be benefitting.
- The UK continues to sustain a leading position but faces intense and increasing competition
- English-speaking countries around the world are actively developing and promoting their offer
- We need additional effort to promote UK ELT globally and English UK's international strategy will deliver more promotional activity than ever before

englishuk.com
englishukfairs.com
studyworldfair.com