ENGLISH UK

UK ELT in China

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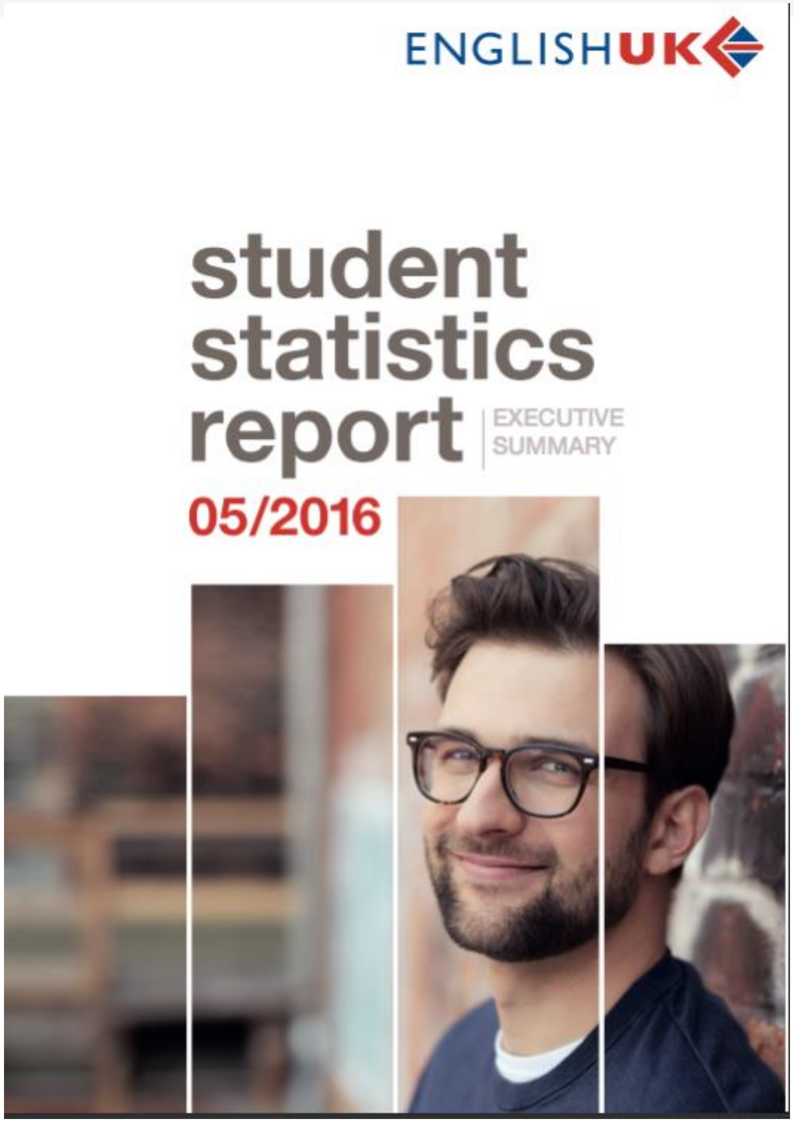
Content

- The state of the market
- English UK's journey in China
- Case studies of English UK members' journey in China
- Reflection and Learning

GENERAL OVERVIEW

THE STATE OF THE MARKET



THE UK AT A GLANCE

English UK membership: overall data for 2015

465
MEMBER CENTRES

-14
VS 2014

535,485
STUDENTS

-8%
VS 2014

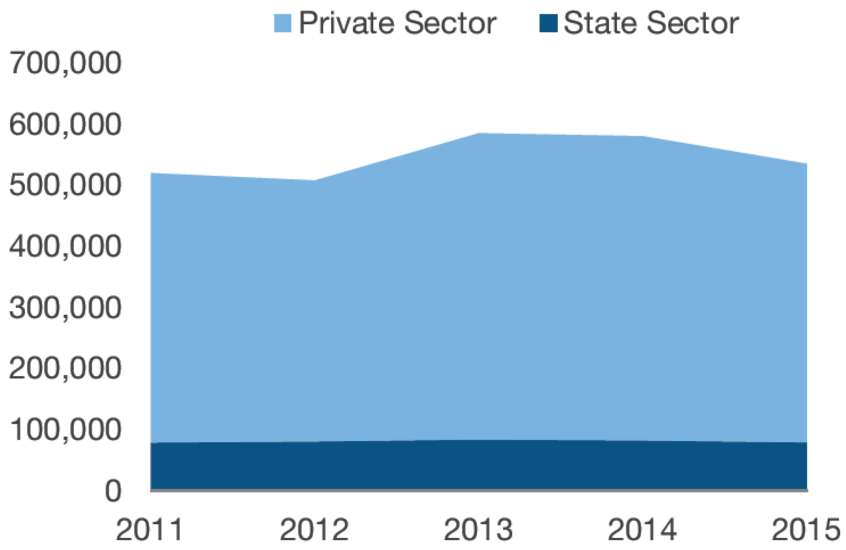
2,047,733
STUDENT WEEKS

-13%
VS 2014

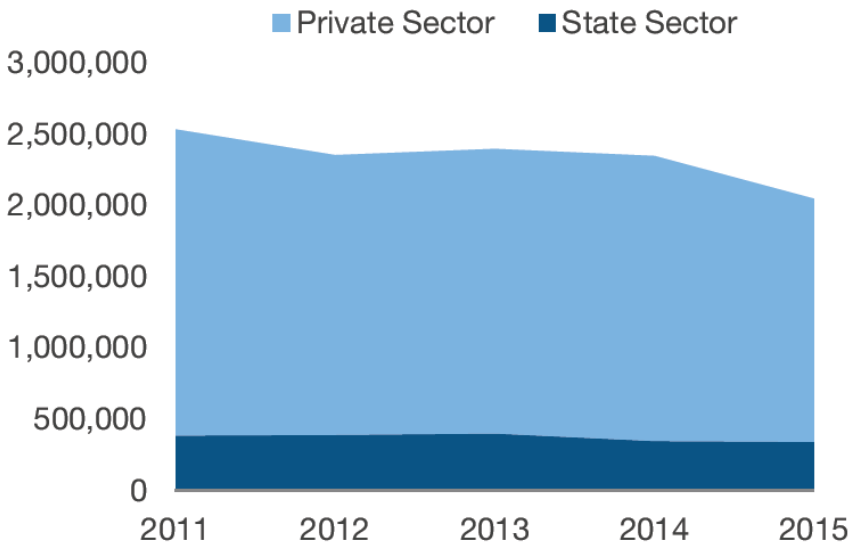
THE UK AT A GLANCE

Number of students and student weeks taught by English UK member centres (2011 - 2015)

STUDENT NUMBERS



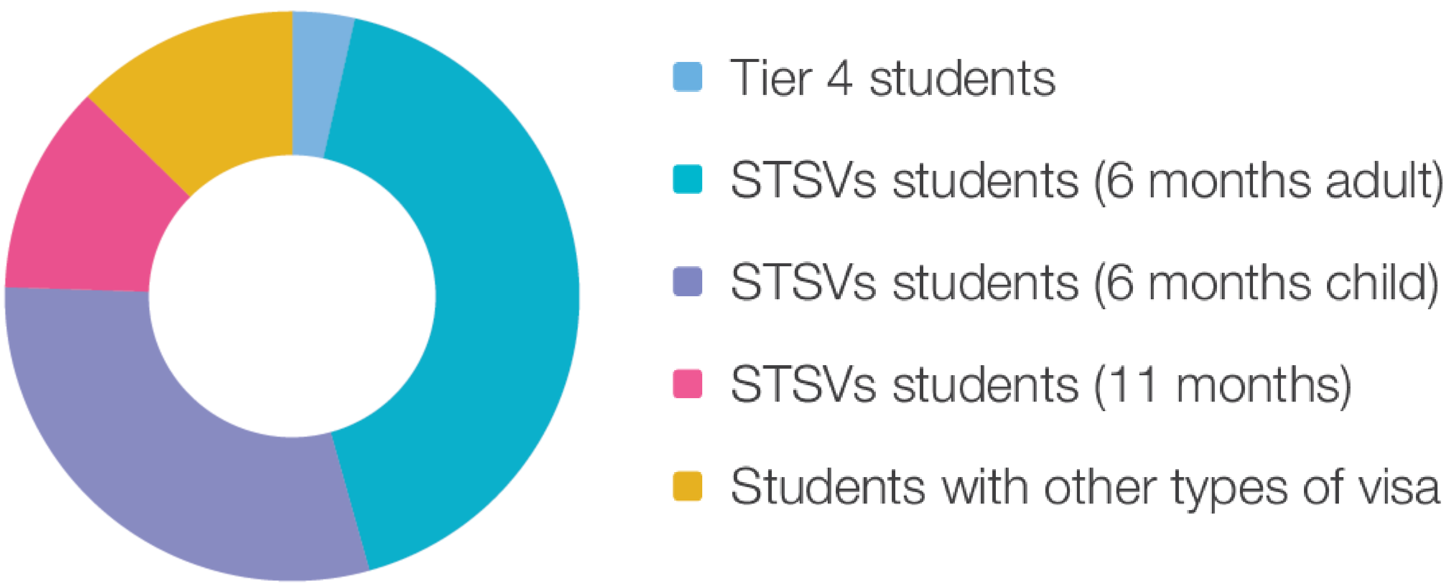
STUDENT WEEKS



Source: English UK, 2011 - 2015

MARKET OVERVIEW

Student numbers by visa type for private sector members (2015)



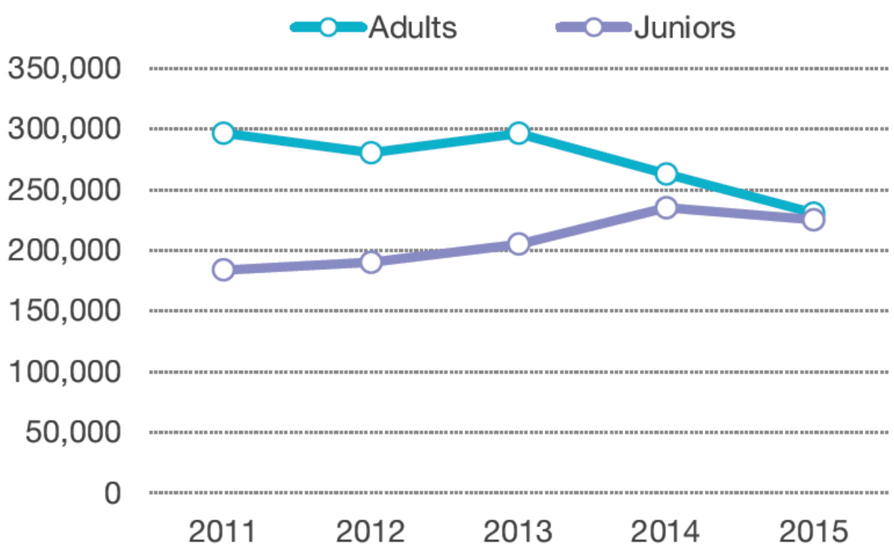
Source: English UK, 2015

PRIVATE SECTOR MEMBER CENTRES

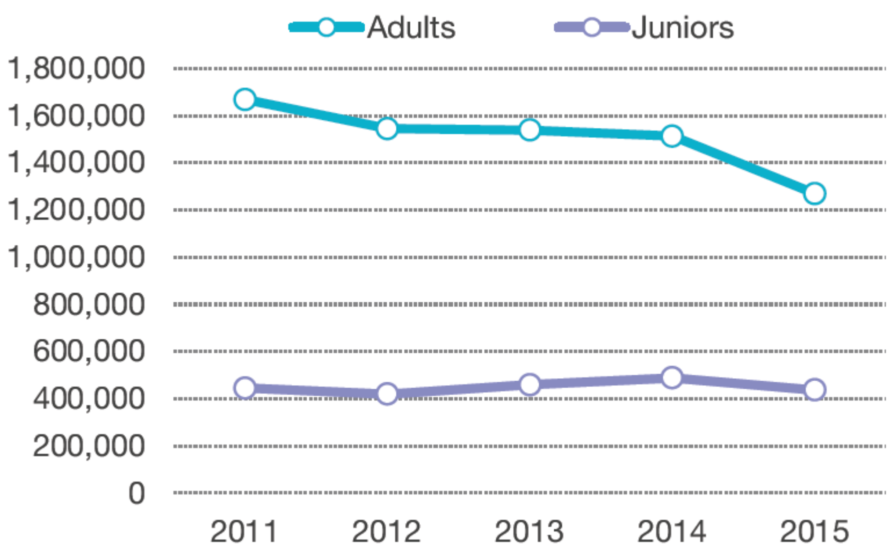
ADULT VS JUNIOR RATIO

Adult and junior students and student weeks for private sector members (2011 - 2015)

STUDENT NUMBERS



STUDENT WEEKS

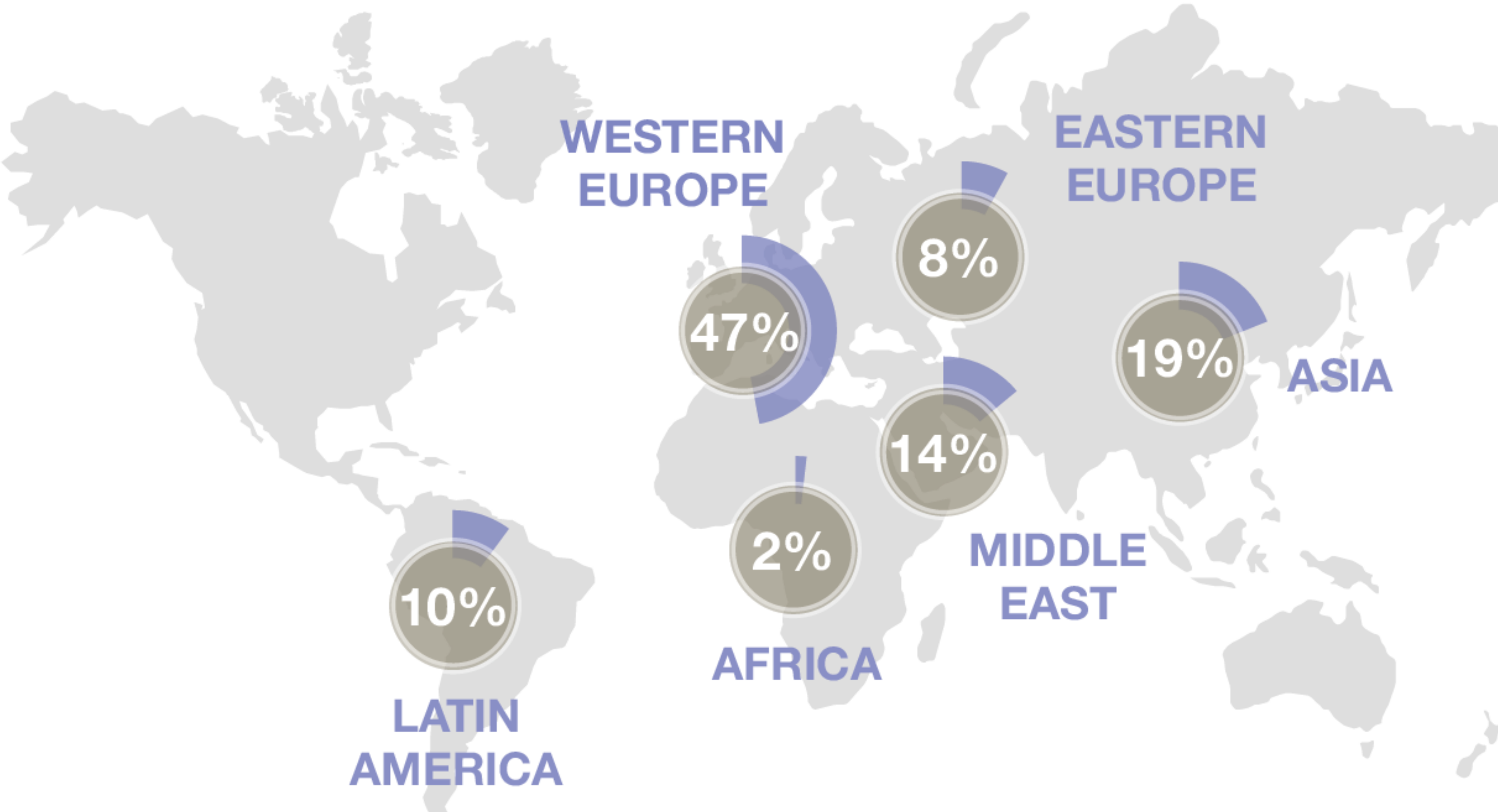


Source: English UK, 2011 - 2015

PRIVATE SECTOR MEMBER CENTRES

SOURCE REGIONS

Source region market shares for private sector members (UK ELT, student weeks, 2015)

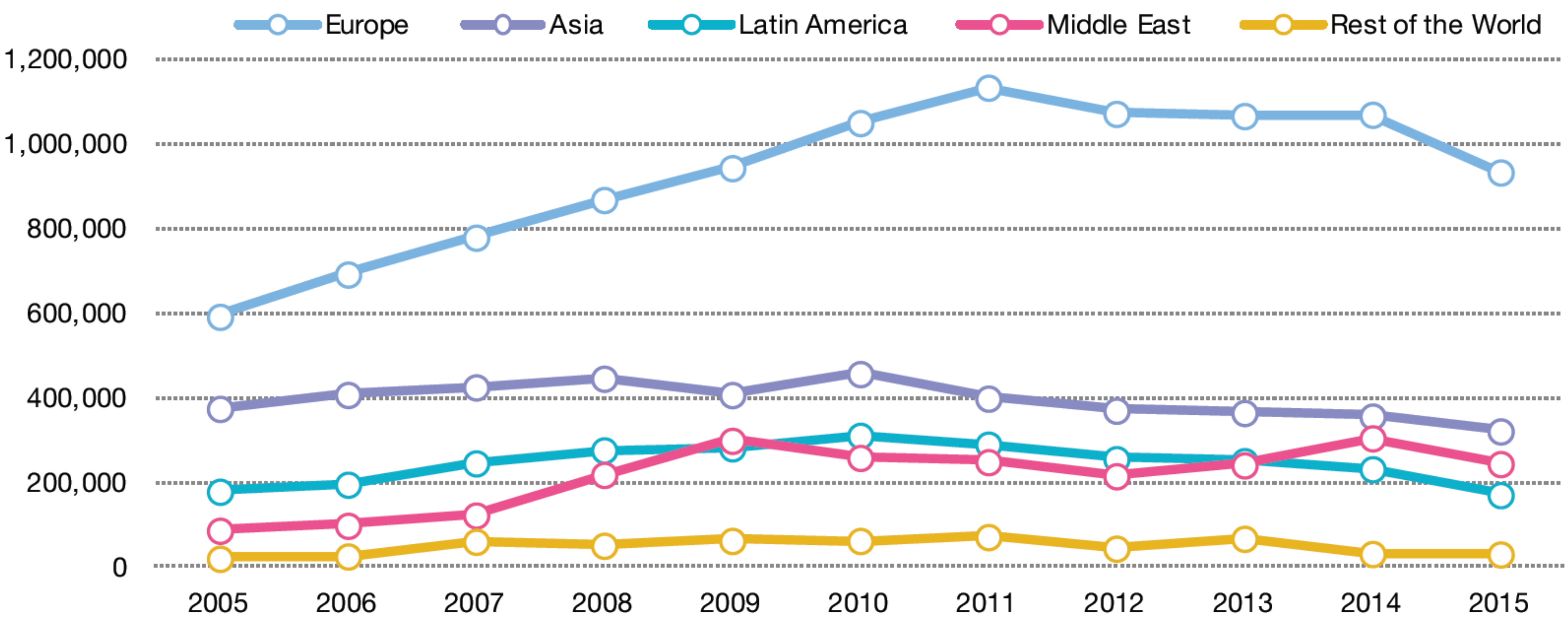


Source: English UK, 2015

PRIVATE SECTOR MEMBER CENTRES

SOURCE REGIONS

Number of student weeks for private sector members by source region (2005 - 2015)

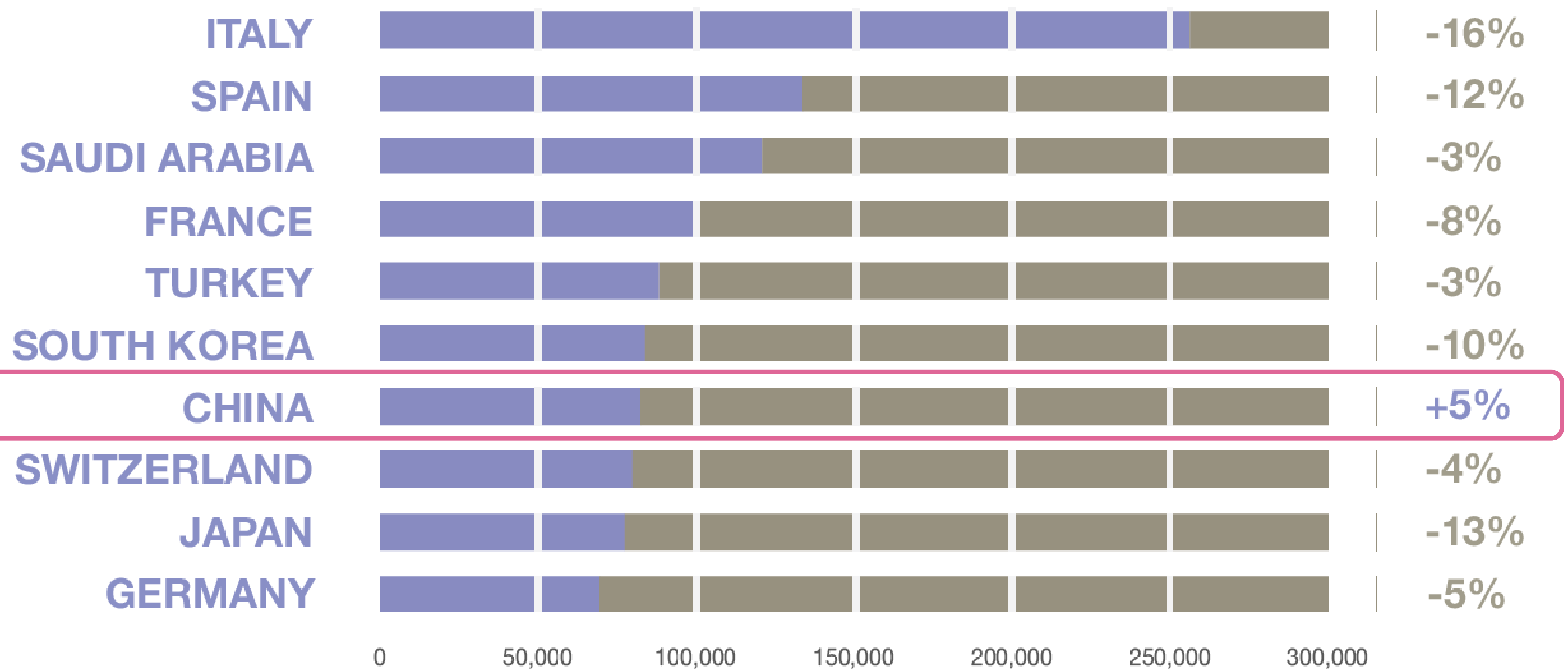


Source: English UK, 2005 - 2015

PRIVATE SECTOR MEMBER CENTRES

SOURCE REGIONS

Top 10 source markets for private sector members (2015 student weeks and 2014 % change)



PRIVATE SECTOR MEMBER CENTRES

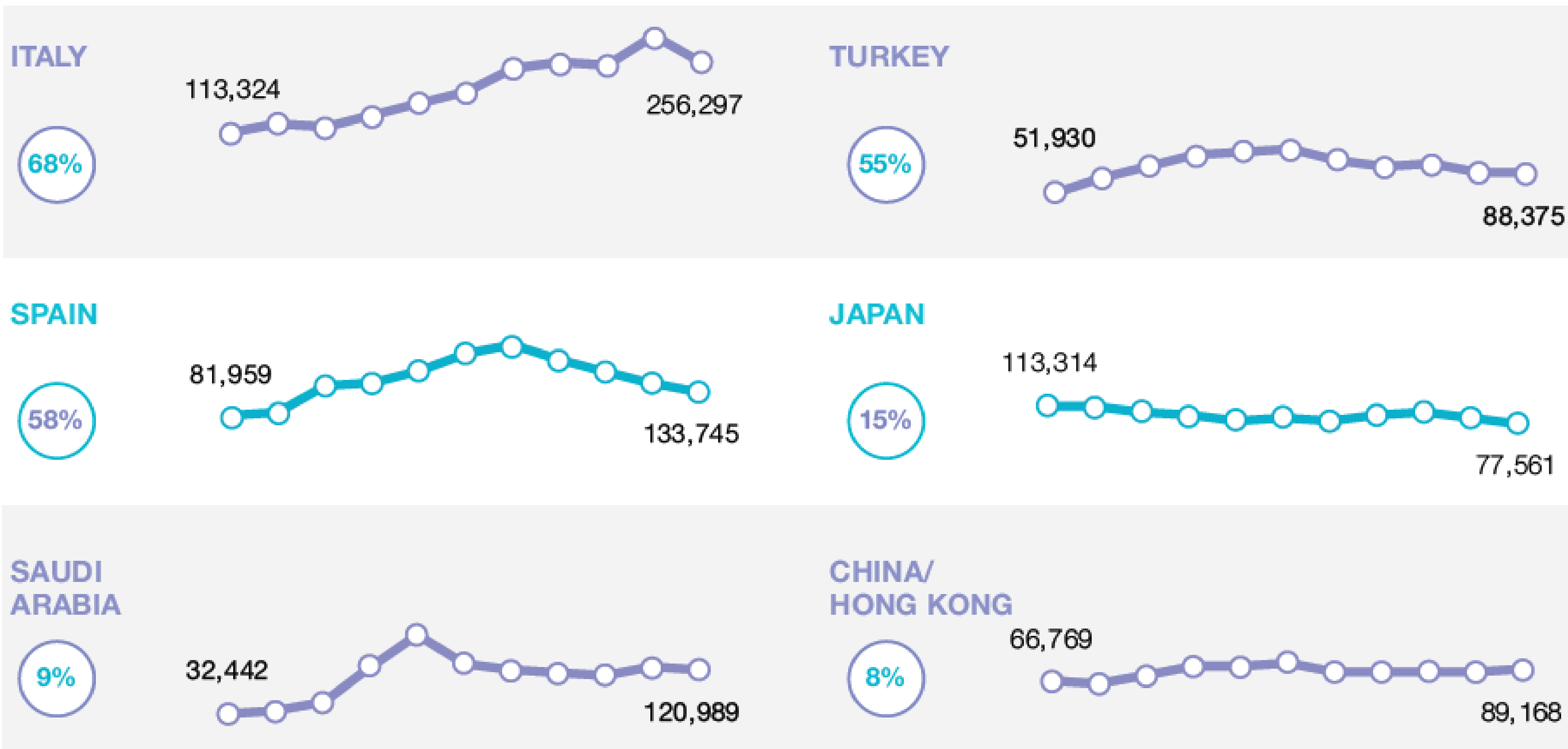
SOURCE REGIONS

Rank by student weeks	Country/Region	Student weeks (2014)	Student weeks (2015)	Share of total student weeks (%)	Change in number of weeks (%)	Student numbers (2014)	Student numbers (2015)	Share of total students (%)	Change in student numbers (%)	Average length of stay (2015)
1	Italy	303,981	256,297	15.03%	-15.69%	128,881	111,610	24.47%	-13.40%	2.3
2	Spain	152,135	133,745	7.84%	-12.09%	46,981	43,006	9.43%	-8.46%	3.1
3	Saudi Arabia	124,215	120,989	7.09%	-2.60%	11,402	12,149	2.66%	6.55%	10.0
4	France	107,823	99,361	5.83%	-7.85%	41,796	38,500	8.44%	-7.89%	2.6
5	Turkey	90,691	88,375	5.18%	-2.55%	13,117	13,622	2.99%	3.85%	6.5
6	South Korea	92,996	83,975	4.92%	-9.70%	6,482	7,108	1.56%	9.66%	11.8
7	China	78,287	82,507	4.84%	5.39%	18,407	21,958	4.81%	19.29%	3.8
8	Switzerland	83,241	79,910	4.69%	-4.00%	19,723	18,168	3.98%	-7.88%	4.4
9	Japan	88,677	77,561	4.55%	-12.54%	14,890	13,669	3.00%	-8.20%	5.7
10	Germany	73,089	69,519	4.08%	-4.88%	37,258	34,862	7.64%	-6.43%	2.0

PRIVATE SECTOR MEMBER CENTRES

SOURCE MARKETS

Chart 14: Performance of selected source markets and the UK's estimated market share (student weeks, 2005 - 2015)



PRIVATE SECTOR MEMBER CENTRES

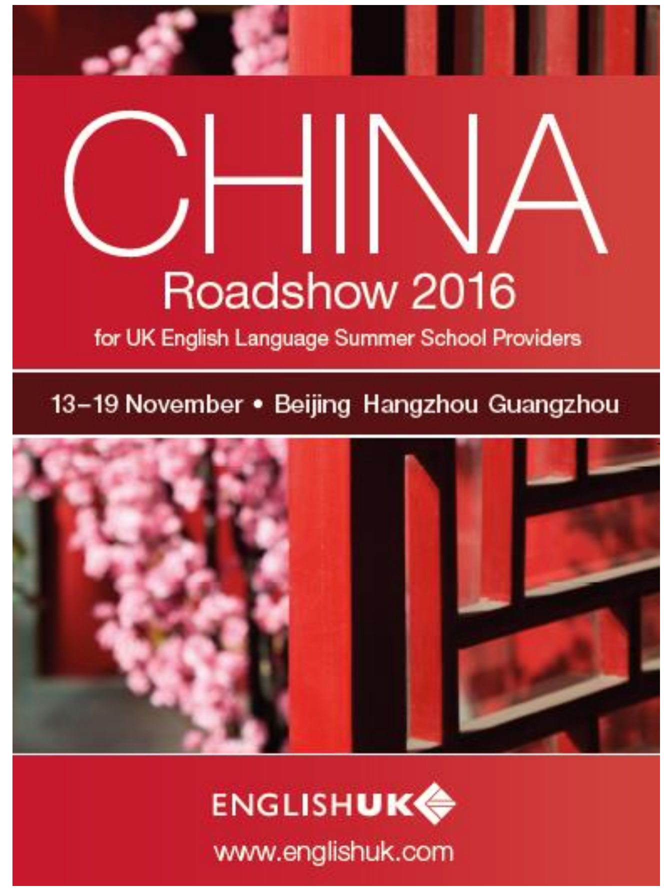
SOURCE REGIONS

Ranking	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
1	Japan	S Korea	S Korea	S Korea	S Korea	Saudi Arabia	Spain	Italy	Italy	Italy	Italy	Italy
2	S Korea	Italy	Italy	Spain	Spain	Spain	Italy	Spain	Spain	Spain	Spain	Spain
3	Italy	Japan	Japan	Italy	Italy	Italy	S Korea	S Korea	Brazil	Brazil	Saudi Arabia	Saudi Arabia
4	China	Brazil	Brazil	Brazil	Saudi Arabia	S Korea	Turkey	Saudi Arabia	Saudi Arabia	Saudi Arabia	France	France
5	Brazil	Spain	Spain	Turkey	Turkey	Turkey	Saudi Arabia	Brazil	S. Korea	S. Korea	Korea	France
6	Spain	China	Turkey	Japan	Colombia	Colombia	Colombia	Turkey	France	France	Russia	Turkey
7	Switzerland	Switzerland	France	Colombia	Brazil	Brazil	Brazil	France	Turkey	Turkey	Libya	South Korea
8	France	France	China	China	China	China	China	Russia	Russia	Russia	Turkey	China
9	Russia	Turkey	Russia	France	Japan	France	France	Colombia	Japan	Japan	Japan	Switzerland
10	Germany	Russia	Switzerland	Russia	France	Japan	Japan	China	Switzerland	Switzerland	Switzerland	Japan
11	Turkey	Germany	Colombia	Switzerland	Russia	Germany	Russia	Switzerland	China	China	China	Germany
12	Colombia	Colombia	Germany	Saudi Arabia	Germany	Russia	Switzerland	Japan	Germany	Germany	Brazil	Brazil
13	Taiwan	Saudi Arabia	Saudi Arabia	Germany	Switzerland	Switzerland	Germany	Germany	Colombia	Colombia	Germany	Colombia
14	Poland	Taiwan	Taiwan	Thailand	Thailand	Thailand	Thailand	Thailand	Thailand	Thailand	Colombia	Russia

Our journey in China

- China fluctuates in the league table due to:
  - The change of UK visa regime
  - Significant growth in domestic ELT provision
  - Competition from other English speaking destinations
- New growth & new opportunities in the short term holiday courses

The China Roadshow



The China Roadshow

- More specialised agents with specific target customers
- More segmented market
- Variety of marketing channels
- Better English levels
- More aware of UK culture, education system and its USPs

Case study 1 – Millfield

- **Started summer programme in 2001 with very few Chinese students**
- **Attended the China Roadshow in 2010 and 4 consecutive years.**
- **China became the biggest market and there is no sign of slowing down**
- **Invest in relationships & trust**
- **Building the brand through the media**

MILLFIELD ENTERPRISES

Case study 2 – International House London

- **Big regional differences in China**
- **Extremely challenging but rewarding**
- **Parents are ambitious and want everything**
- **A lot of enthusiasm and promises, but not everything will come off.**
- **Where to focus is a big problem**
- **Teacher Training programmes & Young Learners programmes**

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Case study 3 – Concorde International

- A maturing market with a lot more savvy agents
- Market has gone from L + A to A + L
- Authenticity: moving away from international mix classes to integration classes
- ‘Theme’ means ‘Topic’
- Introductory programme to much younger children
- Chinese parents want the way British children were brought up and will invest

Case study 4 – Loughborough College

- Have to be more creative in designing the ELT product
- A part of the package for school collaboration projects
- Integration taster classes
- Winter and summer programmes

Loughborough
COLLEGE est. 1909

Case study 5 – Universities

- **70% - 80% Chinese students**
- **Average stay 10 – 12 weeks**
- **Pre-sessional courses on T4**
- **Short term groups**
  - **Teacher Training**
  - **English plus (Music, Performing Art, Real Estate)**
  - **Integration course**

Brunel University

#WeAreInternational

University of Sheffield

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Reflection & Learning

- Learners are becoming younger
- The market is changing fast
- Demand – Supply mismatch
- Varied appetite for the Chinese market