



The latest news from English UK

Jodie Gray, Director of Strategic Development, English UK

Louise Gow, Agent Relations Manager, English UK

- A national association for accredited English language teaching centres in the UK
- A charity registered in the UK
- 430 members from private language schools to boarding schools and universities
- > 497,000 international students attend English language related programmes in the UK each year.

- To 'advance the education of international students in the English language'
- Quality Assurance, Marketing & Promotion, Training, Government lobbying and Membership Services.
- Quality Assurance includes Student Emergency Fund & the Student Complaint Procedure

MARKET SIZE



497,028
STUDENTS

+14%
VS 2016



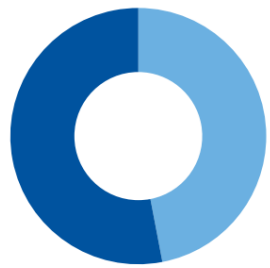
1,884,168
STUDENT WEEKS



+5%
VS 2016

Source: English UK, 2017

Adult vs junior share

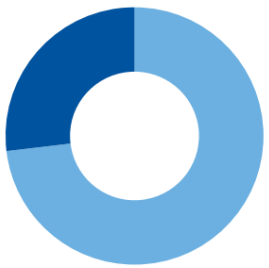
STUDENT NUMBERS



-  Adults
-  Juniors



STUDENT WEEKS

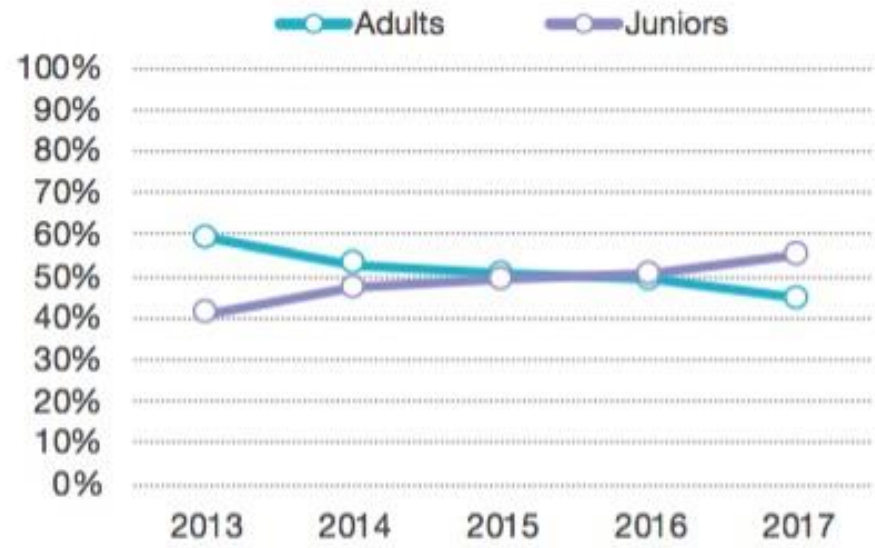


Source: English UK, 2017; n=420 state and private sector member centres

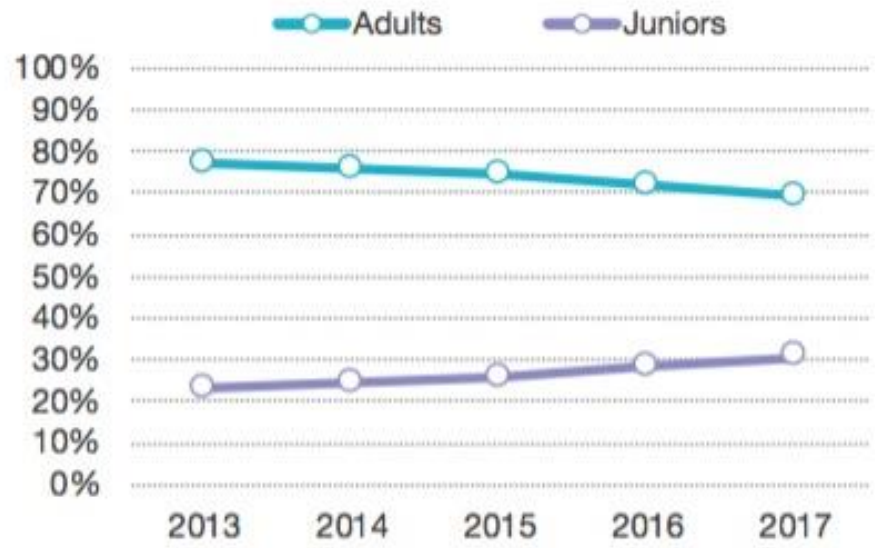
Adult vs junior share

Chart 11: Share of adults and juniors out of the total number of students and student weeks in the UK (private sector)

STUDENT NUMBERS

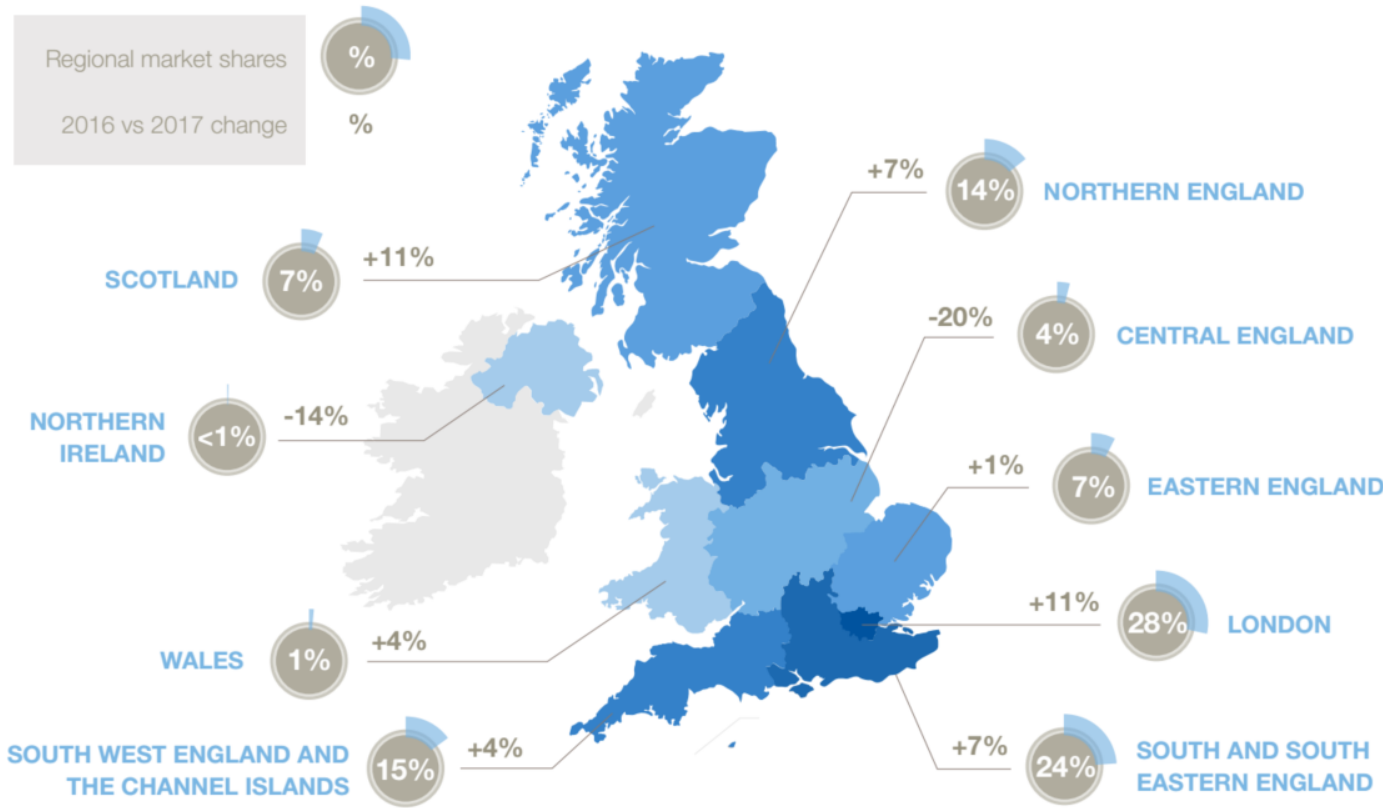


STUDENT WEEKS



Source: English UK, 2013-2017

Regional market share in 2017 and change from 2016 (student weeks)

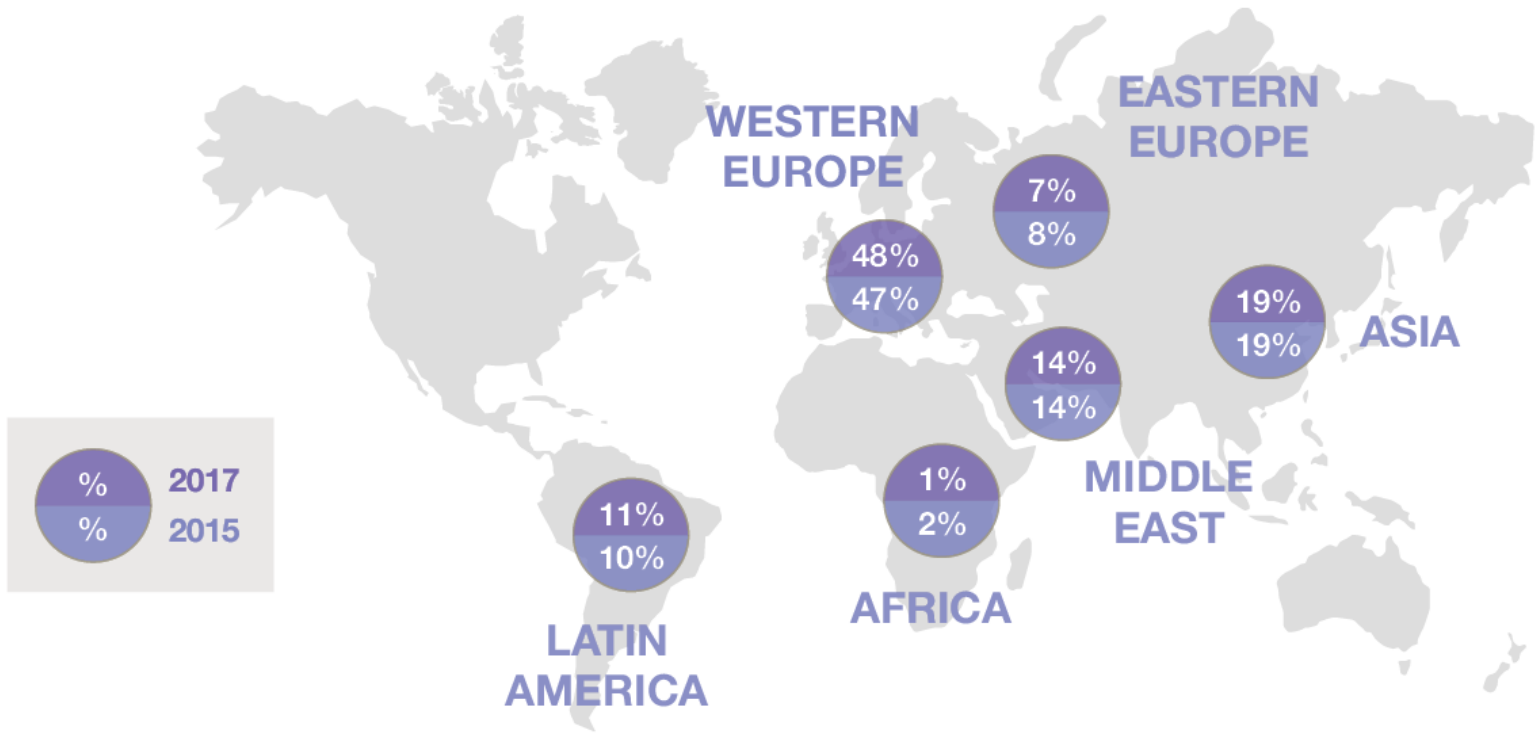


Source: English UK, 2016-2017

SOURCE REGIONS

Students from Asia make up 19% of UK ELT students

Source region market shares (student weeks, 2015 vs 2017)



Source: English UK, 2017

TOP SOURCE MARKETS 2017

Rank	Country/region	Student weeks (2016)	Student weeks (2017)	Share (% , 2017)	Change in student weeks (%)	Student numbers (2016)	Student numbers (2017)	Share (% , 2017)	Change in student numbers (%)	Average length of stay (2017)
1	Italy	224,139	265,362	16.5%	18.4%	99,234	128,357	27.6%	29.3%	2.1
2	Saudi Arabia	141,120	134,301	8.4%	-4.8%	14,986	14,941	3.2%	-0.3%	9.0
3	Spain	110,730	114,277	7.1%	3.2%	38,876	43,211	9.3%	11.2%	2.6
4	China	85,328	98,011	6.1%	14.9%	24,741	33,923	7.3%	37.1%	2.9
5	Turkey	82,541	97,263	6.1%	17.8%	13,232	14,904	3.2%	12.6%	6.5
6	France	87,105	87,508	5.4%	0.5%	35,842	34,794	7.5%	-2.9%	2.5
7	Switzerland	70,886	74,996	4.7%	5.8%	17,661	17,957	3.9%	1.7%	4.2
8	South Korea	70,868	73,084	4.5%	3.1%	6,135	5,964	1.3%	-2.8%	12.3
9	Japan	63,397	63,730	4.0%	0.5%	11,589	11,025	2.4%	-4.9%	5.8
10	Brazil	40,552	62,198	3.9%	53.4%	8,463	12,983	2.8%	53.4%	4.8
11	Germany	60,595	59,498	3.7%	-1.8%	31,111	30,597	6.6%	-1.7%	1.9
12	Russia	32,460	47,154	2.9%	45.3%	10,712	17,469	3.8%	63.1%	2.7
13	Kuwait	36,662	33,227	2.1%	-9.4%	3,123	3,236	0.7%	3.6%	10.3
14	Colombia	26,234	33,122	2.1%	26.3%	2,591	3,158	0.7%	21.9%	10.5
15	Taiwan	23,636	28,534	1.8%	20.7%	3,637	4,616	1.0%	26.9%	6.2
16	Thailand	20,685	24,602	1.5%	18.9%	3,188	3,980	0.9%	24.8%	6.2
17	Oman	21,112	22,682	1.4%	7.4%	2,339	2,926	0.6%	25.1%	7.8
18	Argentina	16,441	19,602	1.2%	19.2%	5,063	5,923	1.3%	17.0%	3.3
19	Mexico	17,011	17,173	1.1%	1.0%	4,511	4,056	0.9%	-10.1%	4.2
20	Chile	13,687	14,770	0.9%	7.9%	2,360	2,331	0.5%	-1.2%	6.3

QUIC QUARTERLY INTELLIGENCE COHORT

- Timely information every quarter
- In-depth analysis
- Regional analysis including multi-centres
- Trend identification (each quarter & annually)
- Strong sector representation
- Exclusive insights for QUIC members
- Executive summary available to all

Q3 2018 – headlines from our latest data #1

- **142** English UK member centres based in **236** teaching centre locations reported data in Q3 2018 (July – September). These centres reported a total of **396,783** student weeks of which 64% were spent by adults and 36% by juniors
- Student weeks reported from Japan decreased **by around 4.0%** on Q3 2017
- Student weeks reported from South Korea decreased **by around 14%** on Q3 2017
- Student weeks reported from Taiwan decreased **by around 15%** on Q3 2017

Q3 2018 – headlines from our latest data #2

- **Japan** was the **9th biggest source market** with a 3.5% share of the total market. **78%** of the student weeks from Japan were spent by adults, **22%** by juniors.
- **South Korea** was the **11th biggest source market** with a 3.3% share of the total market. **95%** of the student weeks from South Korea were spent by adults, **5%** by juniors.
- **Taiwan** was the **13th biggest source market** with a 2.0% share of the total market. **77%** of the student weeks from Taiwan were spent by adults, **33%** by juniors.

Q3 2018 – headlines from our latest data #3

- **80%** of student weeks from Japan were booked via a partner/agency (commissionable), **92%** from South Korea and **86%** from Taiwan. The global average is 80%.
- **76%** of student weeks from Japan were individual bookings, **24%** were group bookings.
- **87%** of student weeks from South Korea were individual bookings, **13%** were group bookings.
- **69%** of student weeks from Taiwan were individual bookings, **31%** were group bookings.
- The global average was **66%** of student weeks being individual bookings, **34%** group bookings.



StudyWorld 2019
QEII Centre, London
Monday 2 – Wednesday 4 September



You are invited to attend StudyWorld 2019. Attendance is **free of charge** (we provide two nights of accommodation) – you only need to cover the cost of your flights.



Organised by English UK, StudyWorld is the major trading event focusing on UK education, supported by the **British Council** and the **UK government**.

Meet **175 of the UK's best education providers** including English language centres, boarding schools, colleges and universities. All educators at StudyWorld are **accredited**.

English UK + Agents

Have you sent students to three or more English UK member centres in the last 12 months? Then **join English UK as a partner agency.**

Use our **partner agency logo** on your website, social media profiles and other materials - stand out in a competitive market.

A profile in the online **English UK Partner Agency Directory.**

Regular updates and **free help & advice on UK visas.**

Subscription fee is **£225** per agency for two years.



Welcome
Date 21/01/15

Regina
Sufi
Ihor
Silva
Jane
Alma
Alifa
Shirin
Munira
Hadiya

Bristol Refugee Rights
Eddie Byers Fund | englishuk.com/eddie-byers-fund



Making sure young learners are safe in the UK

Jodie Gray, Director of Strategic Development, English UK

- Organisations working with children must comply with the provisions of the Children Acts 1989 and 2004, the Vulnerable Groups Act 2006, Counter Terrorism & Security act 2015.
- English language centres provide courses for under 18s are subject to regulations under British Council Accreditation.
- Consequences of failing to comply: fine, prison, lose accreditation, close business...

- When you are in the UK, UK laws and regulations apply.
- A child is.....under 18.
- All adults who work with children under 18 have a legal Duty of Care always.
- Same as a caring responsible parent.

- Caring for students in all ways.
- It encompasses all areas of the safety and welfare of your students including homesickness, bullying, general health and well-being, even whether they are eating properly.

- Have overall responsibilities for caring for children
- Have a clear safeguarding policy
- Provide information and training to all staff, students and group leaders
- Making sure only suitable adults have access to children (DBS or police check)
- Designated Safeguarding and Prevent Officer
- Safe school premises
- Suitable accommodation & care
- Supervision & safety outside of classes
- 24 hour contact
- Safe activities – risk assessment

Activity: *London Excursion – Westminster sightseeing & shopping on Regent Street & Hamleys*

No	What are the hazards?	Who might be affected and how?	What are you already doing?	What further action is necessary? (Be precise with information)	Action by when / whom	To inform Students
	Generic					
1	Traffic danger	Students, group leaders, staff	Road crossing training on arrival. Reminder before and during every excursion	Staff to stand in middle of road to help students across safely	All staff on excursions	Yes
2	Weather hazards (wet/sunny)	Everyone	Checking weather forecast day before + morning. Students told to bring rainwear. Sun crème available in excursion packs	Tell students in Houses at wake up what to wear & bring, e.g. jackets / hats / proper footwear etc.	Staff in Houses	Yes
3	Theft / pick pocket	Students, group leaders, staff	Remind students on buses to keep valuables in inside pockets	Tell students to be careful when getting money out, no flashing it about	Staff on excursions & GLs	Yes
4	Public & crowded pavements	Students, group leaders	Train students to always walk in pairs, not to bunch up in groups	Constant checking. Ask group leaders to help.	Staff on excursions & GLs	Yes
5	Stranger danger	Students	Under 13s always with staff. 13+ supervised free time in groups of 3	Check students have ID cards before boarding bus + check they have GL/school phone nos	Staff on excursions & GLs	Yes
6	Student getting lost	Students	Under 13s always with staff. 13+ supervised free time in groups of 3. Student have ID cards, GL and school phone & know meeting point & times	Set limits for where students may roam during supervised free time & patrol the boundaries. Remind them of procedure if lost	Staff on excursions & GLs	Yes
	Specific	WESTMINSTER /	SHOPPING			
7	Demonstrations and road closures	Everyone	Check tfl website and others. Change route of walk if necessary	Staff have maps	Social Organiser	No
8	Trafalgar Square fountains	Students	-	Tell students not to sit on side of fountains or put legs in	Staff on excursion	Yes
9	Crowded shops - Hamleys	Students	Usual registers and supervision ratios	Extra register. One staff member stay at entrance	Staff on excursion	No

Any questions?

For more information on English UK, safeguarding, StudyWorld or how to join us as a partner agency:

Louise Gow
Agent Relations Manager
louise.gow@englishuk.com

Jodie Gray
Director of Strategic Development
jodie.gray@englishuk.com