ENGLISH UK

student statistics report 05/2018

executive summary

englishuk.com

STUDENT STATISTICS REPORT 2017 – EXECUTIVE SUMMARY

Prepared on behalf of:

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INTRODUCTION

It is a pleasure to present our student statistics report this year. There are two reasons for this.

The first is that English UK members have enjoyed their best trading year since 2015, emerging from three years of decline and significantly widening their active source markets. Student weeks increased by five per cent overall, despite a loss of 13 member centres, with notable growth in London and Scotland.

And the second is that this report – our fourth with our insight partner StudentMarketing – is the most comprehensive to date, providing previously unavailable information about university and further education (FE) college activities.

For the first time our understanding of differences between state and private member centres is underpinned by data. While we knew China was equally as important to FE colleges and universities as the private sector (where it has consistently been a top five sending market) we now know it dominates the public sector. Not only is it the top source for universities and FE colleges, but it accounts for 42 per cent of its student weeks, five times more than second-placed Saudi Arabia.

Adults study for around a third longer in the state sector, with an average stay of 9.5 weeks, compared to 5.3 in a private centre. Just 10 per cent of state sector ELT students are juniors, compared to 55 per cent of private sector students.

Detailed data from state sector members also gives us more robust overall student numbers than in the past, when they were extrapolated from student week data. As a result, these figures are not comparable with those previously published, although a re-analysis of 2013-2016 student numbers for this report allows for historical comparison.

All these fascinating new insights have emerged from our commitment to continually improve our market intelligence so that we can support members to make the best-possible decisions and so lead the UK ELT industry to success. This work continues.

METHODOLOGY

The core data used in this report was collated from English UK annual member declarations returned between 2007 and 2017.

ACCESS THE FULL REPORT

English UK members may access the full student statistics report here:

www.englishuk.com/en/members/information-for-members/publications-reports

For other stakeholders, media and interested parties, please contact Jodie Gray, Director of Strategic Development, at jodie@englishuk.com.

KEY FINDINGS

General overview

- After three years of consecutive downturn, 2017 saw a strong rebound by the UK ELT industry, especially for the private sector. English UK member centres welcomed 497,028 English language students (an increase of 14%), who stayed for a total of 1,884,168 weeks (an increase of 5%).
- This growth came despite the number of member centres declining by 13 centres.
- Students under the age of 18 outnumbered adults and represented 53% of all enrolments in the UK ELT sector.
- Regarding regional results, the highest increase in student weeks was recorded in London (+48,761 weeks). London and Scotland were the biggest gainers percentage-wise, both enjoying a 11% y-o-y growth.
- Markets outside the European Union (EU) generated 63% of all student weeks, while contributing 42% of students.

State sector member centres

- Sixty-seven state sector members accounted for a total of 31,486 students and 277,888 student weeks. Both indicators dropped by 12% on 2016.
- Of students attending further education (FE) and higher education (HE) centres, 10% were juniors, representing 4% of the total student weeks for the sector.
- Course length averaged out at 8.8 weeks, with adult students staying an average of 9.5 weeks.
- The top five source countries for state sector members were China (42% of student weeks), Saudi Arabia (8%), Japan (8%), Poland (6%) and South Korea (4%).

Private sector member centres

- There were 361 private sector member centres reporting in 2017.
- In comparison to 2016, private members taught 465,542 English language students (16% y-o-y growth). The number of student weeks generated grew by 9% to reach 1,606,280.
- There were 278 centres enrolling junior students in 2017, which was an increase of two centres on the previous year.
- Private sector centres catering to juniors enrolled an average of 927 students. The average number of adults per member centre stood at 728.
- With a share of 55%, junior students were reconfirmed as the prevailing age band of the ELT student population at private sector centres.
- Similarly to the previous year, the average length of stay of an adult student in 2017 amounted to 5.3 weeks. The junior group stayed for 1.9 weeks (a slight decrease from 2 weeks in 2016).
- The top five sending markets in 2017 were Italy (16.5% of total student weeks), Saudi Arabia (8.4%), Spain (7.1%), China (6.1%) and Turkey (6.1%).
- The biggest growth came from Italy (+41,223 student weeks), Brazil (+21,646) and Turkey (+14,722), while Saudi Arabia (-6,819 student weeks), Kuwait (-3,435 student weeks) and the United Arab Emirates (-2,480) registered the steepest declines.

OVERALL DATA

ENGLISH UK MEMBERSHIP OVERVIEW — MARKET SIZE

428
REPORTING CENTRES

-13
VS 2016

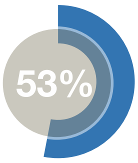
497,028
STUDENTS

+14%
VS 2016

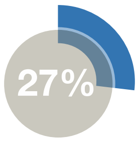
1,884,168
STUDENT WEEKS

+5%
VS 2016

AGE SEGMENTS — MARKET SHARES



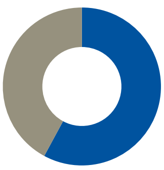
OF ALL
STUDENTS
WERE JUNIORS



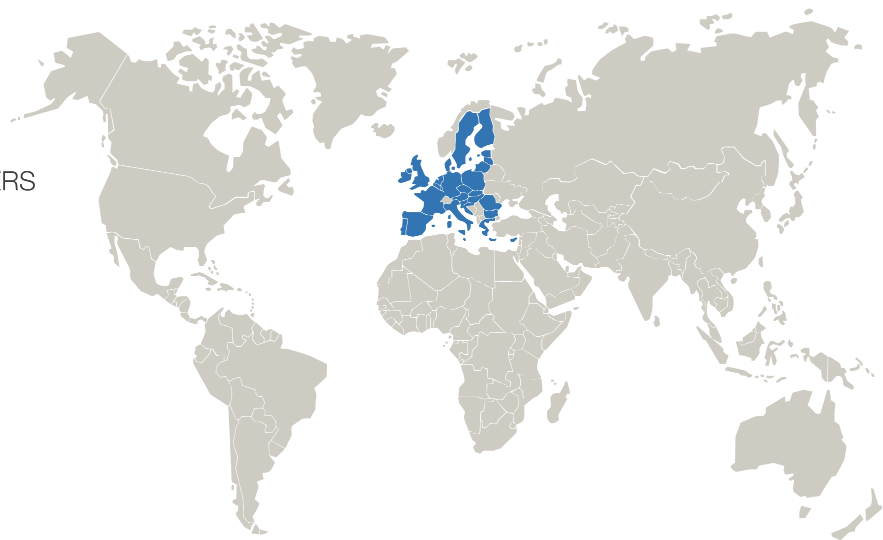
PROPORTION OF
STUDENTS WEEKS
SPENT BY JUNIORS

STUDENT ORIGIN — MARKET SHARES

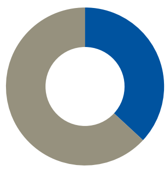
STUDENT NUMBERS



NON-EU **EU**



STUDENT WEEKS



NON-EU **EU**

STATE SECTOR

STATE SECTOR OVERVIEW

MARKET SIZE

67
REPORTING CENTRES

-6
VS 2016

31,486
STUDENTS

-12%
VS 2016

277,888
STUDENT WEEKS

-12%
VS 2016

AGE SEGMENTS

MARKET SHARES

10% OF ALL **STUDENTS** WERE JUNIORS

4% PROPORTION OF **STUDENTS WEEKS** SPENT BY JUNIORS

AVERAGE LENGTH OF STAY

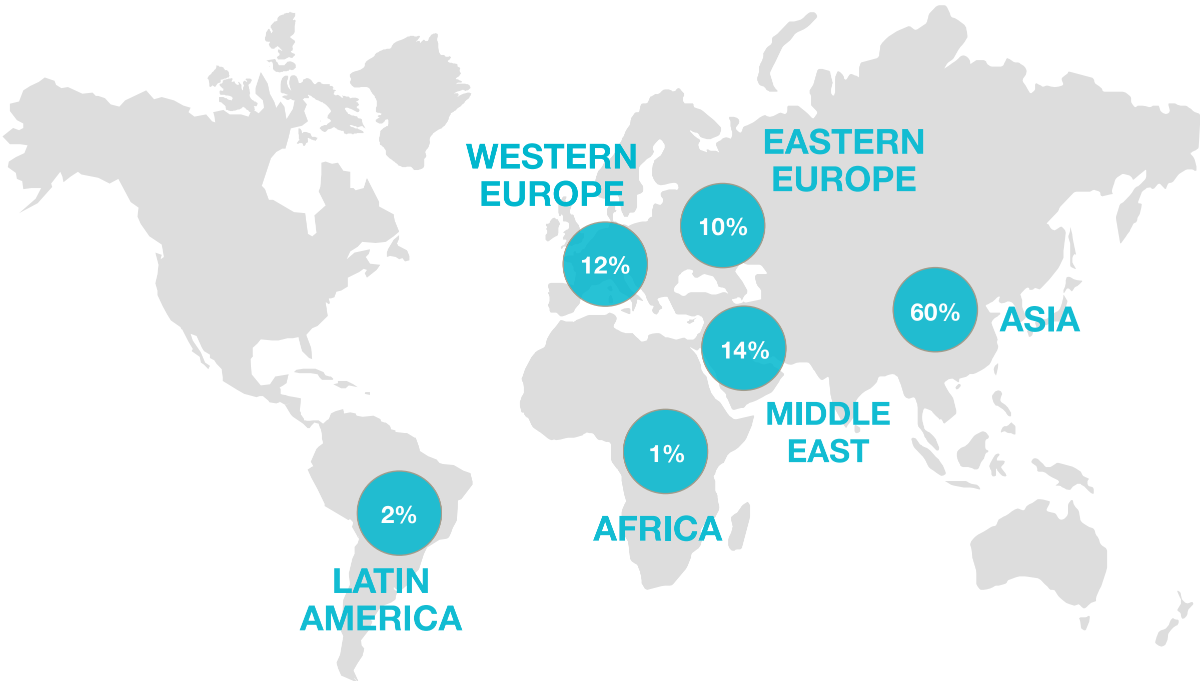
WEEKS

ADULTS
9.5

JUNIORS
3.1

SOURCE REGIONS

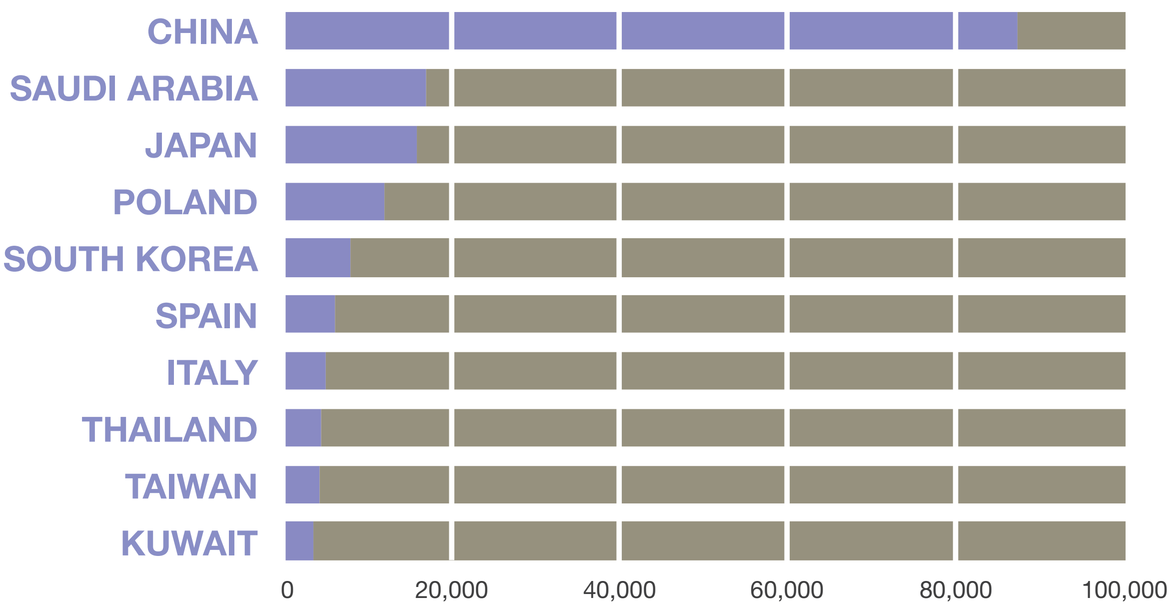
PERCENTAGE OF TOTAL STUDENT WEEKS



Note: Percentages do not add up to 100% due to rounding.

TOP SOURCE MARKETS

STUDENT WEEKS



PRIVATE SECTOR

PRIVATE SECTOR OVERVIEW — MARKET SIZE

361
REPORTING CENTRES

-7
VS 2016

465,542
STUDENTS

+16%
VS 2016

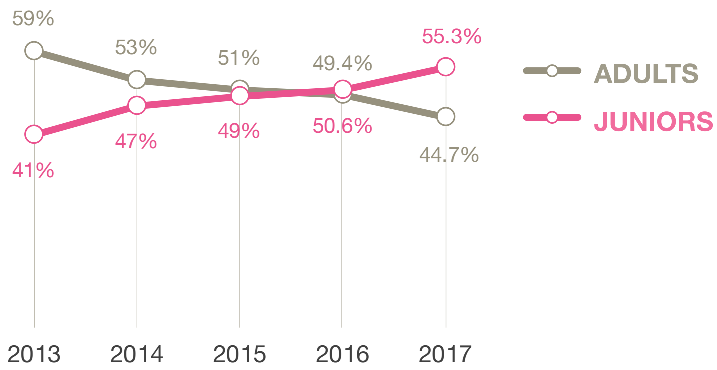
1,606,280
STUDENT WEEKS

+9%
VS 2016

AGE SEGMENTS — MARKET SHARES & HISTORIC TREND

55% OF ALL **STUDENTS** WERE JUNIORS

31% PROPORTION OF **STUDENTS WEEKS** SPENT BY JUNIORS



LENGTH OF STAY — WEEKS

ADULTS

2016: **5.3**

2017: **5.3**

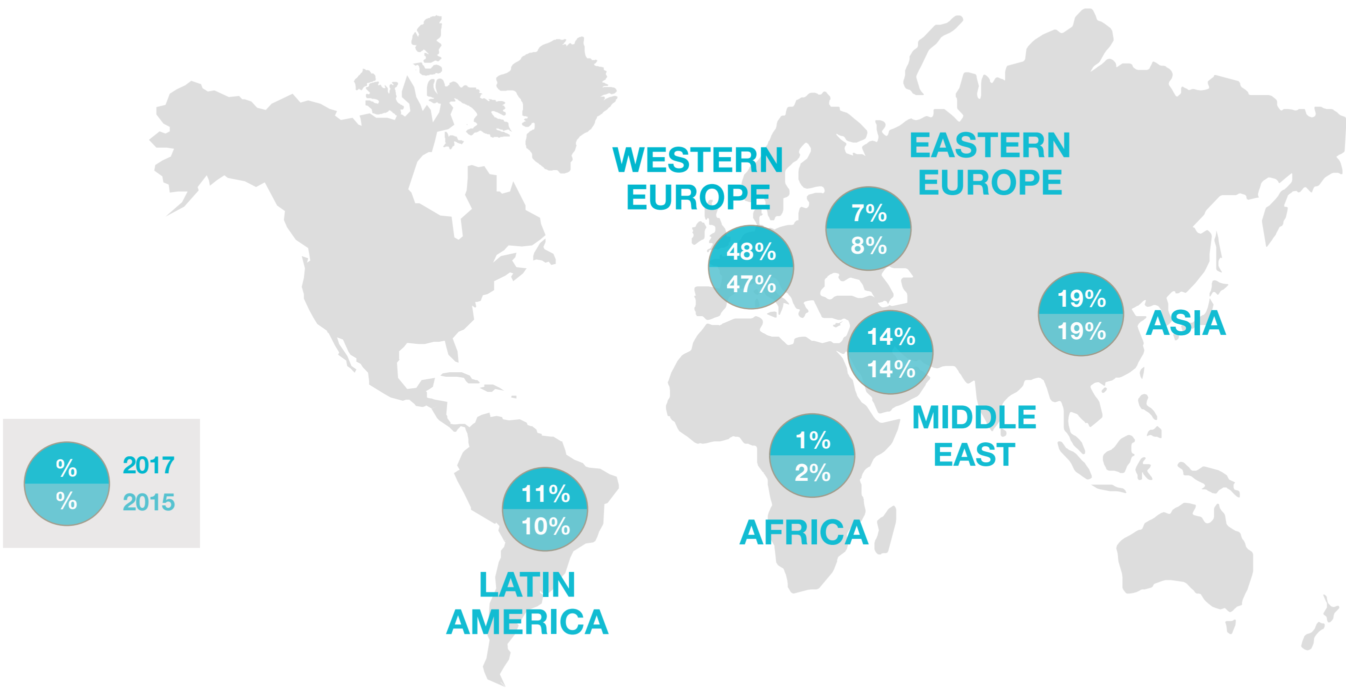
JUNIORS

2016: **2.0**

2017: **1.9**

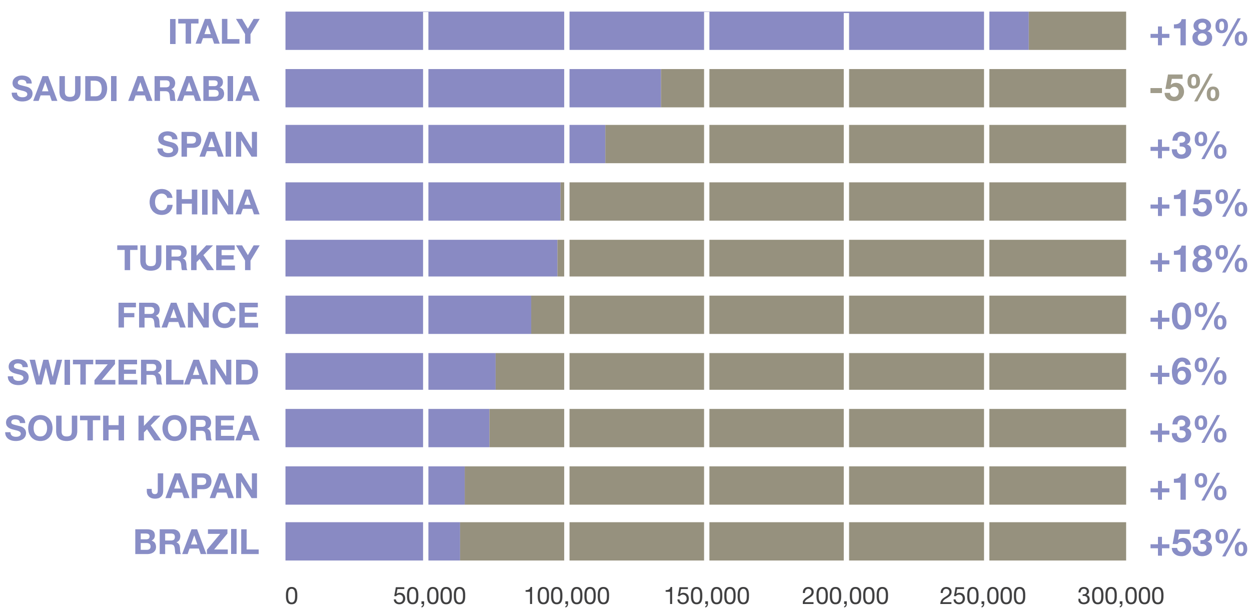
SOURCE REGIONS

PERCENTAGE OF TOTAL STUDENT WEEKS



TOP SOURCE MARKETS

STUDENT WEEKS & Y-O-Y CHANGE



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