student statistics report

EXECUTIVE SUMMARY

05/2016

STUDENT STATISTICS REPORT 2015 – EXECUTIVE SUMMARY

Prepared on behalf of:

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INTRODUCTION

We are pleased to present our latest student statistics report. Last year we began working with StudentMarketing as our insight partner to produce a report that allowed a deeper source market evaluation for the UK's English language teaching sector set within the broader global context. This, our second report prepared by StudentMarketing, continues to build on these improvements.

The current English UK strategy aims for an optimal service for our members and this provision of sophisticated market intelligence does just that. We will continue to review and improve our annual data collection and reporting activities for the benefit of our members.

We understand the importance of robust data, helping members and the association to make well-informed business decisions. The importance of this data is ever more underscored as the UK ELT sector faces arguably its most challenging operating environment to date.

As the global ELT industry matures and undergoes a seismic structural shift, competition between host countries inevitably comes into sharper focus. The trends and insights identified in this report reflect what many will have anticipated based on anecdotal reports and personal experiences of the sector in 2015. They serve as a reality check, but also a firm grounding from which English UK and our members can build a response.

METHODOLOGY

The core data used in this report was collated from English UK annual member declarations returned between 2005 and 2015. This was combined with data gathered by StudentMarketing to indicate the UK's position in the global market, as well as to provide global insights into source markets.

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, Head of Market Development, at jodie@englishuk.com.

KEY FINDINGS

General overview

- 2015 saw approximately 1.4 million students travelling abroad to the eight major destinations (the UK, the US, Canada, Australia, New Zealand, Malta, South Africa and Ireland) to learn English.
- The overall demand for English learning abroad declined. Students have started learning English at an earlier age and are, therefore, displaying more proficiency. There is a greater perceived satisfaction with an upper intermediate level of English - deemed sufficient for English as a lingua franca.
- Available statistics and estimates indicate that Australia (+5%) and Ireland (+10%) attracted an increased number of English language students; while the UK (-8%), Canada (-2%), South Africa (-27%) and Malta (-3%) all experienced declines.
- Approximately 535,485 English language students spent a total of 2,047,733 student weeks at English UK's 465 state and private sector member centres in 2015.
- Year on year this equates to an 8% decrease in terms of student numbers, and 13% in terms of student weeks.
- 28% of all student weeks were spent in member centres located in the London region.
- The UK ELT market was affected by strengthening of the British pound, existing visa policies, and the drop in overall demand for English learning abroad.
- It also faced particular difficulties in certain important source markets: absence of the PON scholarship in Italy, the security situation in Libya, and the fall of the rouble in Russia.

State sector member centres

- In 2015, the results for state sector membership displayed relative stability: 77 centres taught 342,083 student weeks, similar to 2014 where 80 centres taught 347,965 student weeks.
- The majority of students (61%) studied under the Tier 4 visa, with a further 24% studying under the Short-term study (6 month adult) visa category.
- The average number of visa denials, per state sector member, increased from 7.5 in 2014 to 8.2 in 2015.

Private sector member centres

- 456,034 students spent a cumulative total of 1,705,650 student weeks learning English in private sector member centres in 2015.
- Compared to 2014, private sector member centres received 42,038 fewer students who spent 300,384 fewer student weeks.
- Out of all private sector members that offer junior programmes, the number of junior students per centre in 2015 averaged 813 (a 9% decrease compared to 2014). The average number of adults per centre stood at 749 (a drop of 10% from 2014).
- Students applying to private sector member centres were denied visas at the same rate as students in state sector institutions (8.2 visa denials per centre).
- In 2015, the average length of stay decreased for both adults (5.6 weeks) and junior students (2.9 weeks).
- The top source markets in 2015 were Italy, Spain, Saudi Arabia, France and Turkey.
- The Czech Republic (+12,058 student weeks), China (+4,220) and Kuwait (+4,180) represented the leading growth markets.
- While, Libya (-57,927 student weeks), Russia (-50,689) and Italy (-47,684) were the three markets with the sharpest declines in sending power in 2015.

Conclusions

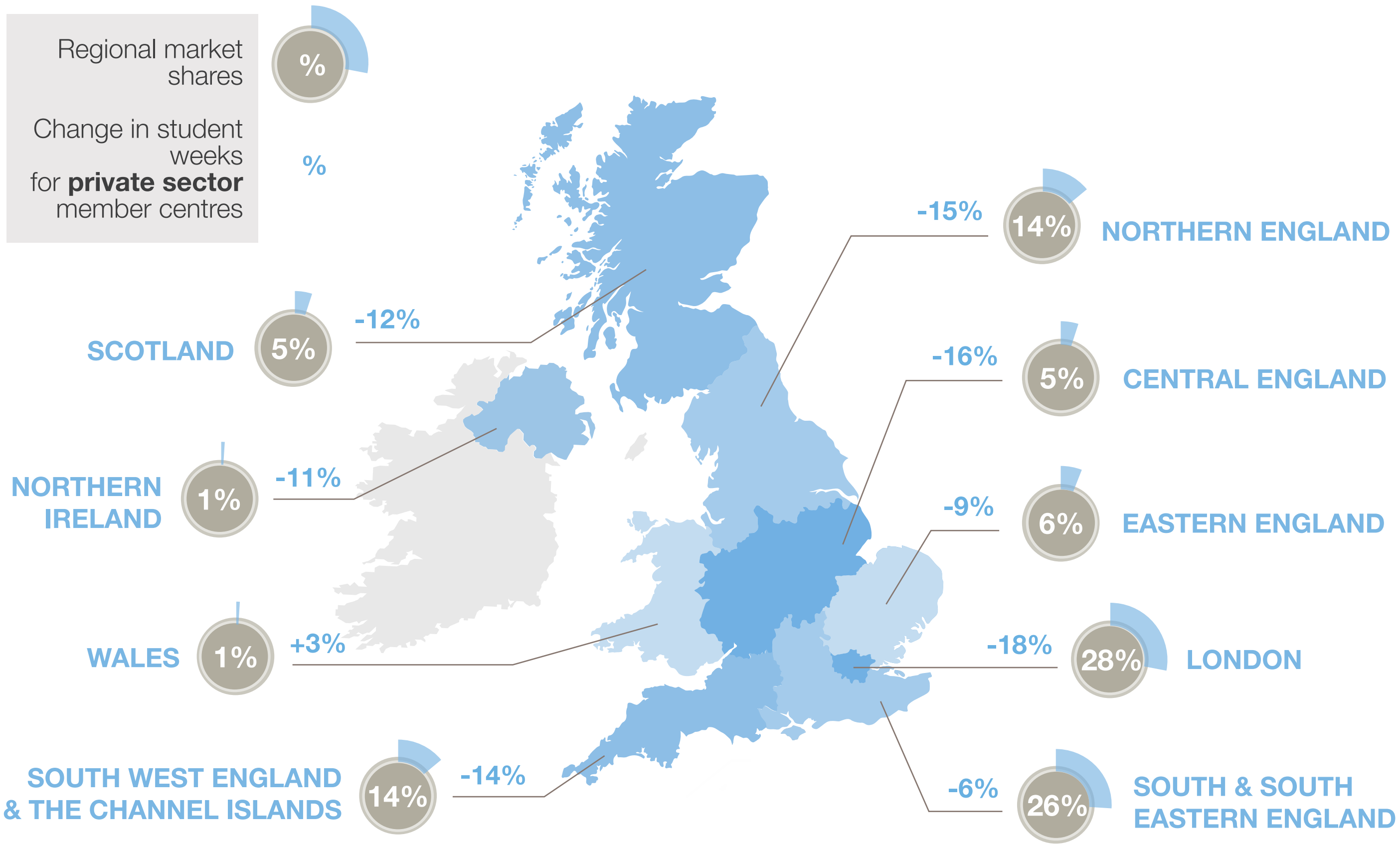
- Western Europe remains the most important source region, although it is increasingly losing its sending power. Globally, the biggest growth opportunities for UK ELT lie in recruiting students from Asia and the Middle East.
- The top 20 source markets account for 83% of all student weeks at private sector member centres.
- 2015 saw the first decline (-4%) in the junior segment. However, as the adult segment suffered a steeper decline (-13%), juniors now account for nearly half (49%) of all student arrivals to English UK's private sector members.

INFOGRAPHICS

ENGLISH UK MEMBERSHIP IN FIGURES — OVERALL DATA

465 MEMBER CENTRES	535,485 STUDENTS	2,047,733 STUDENT WEEKS
-14 VS 2014	-8% VS 2014	-13% VS 2014

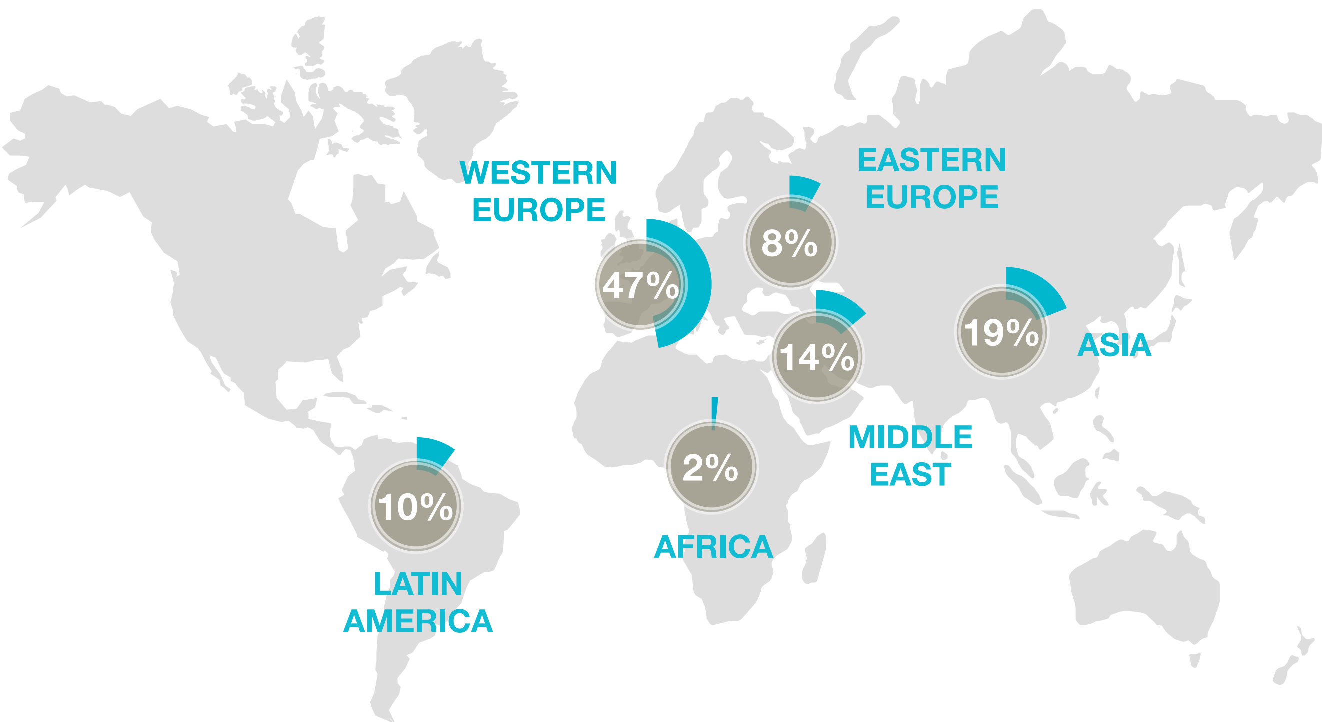
REGIONAL OVERVIEW — STUDENT WEEKS



INFOGRAPHICS

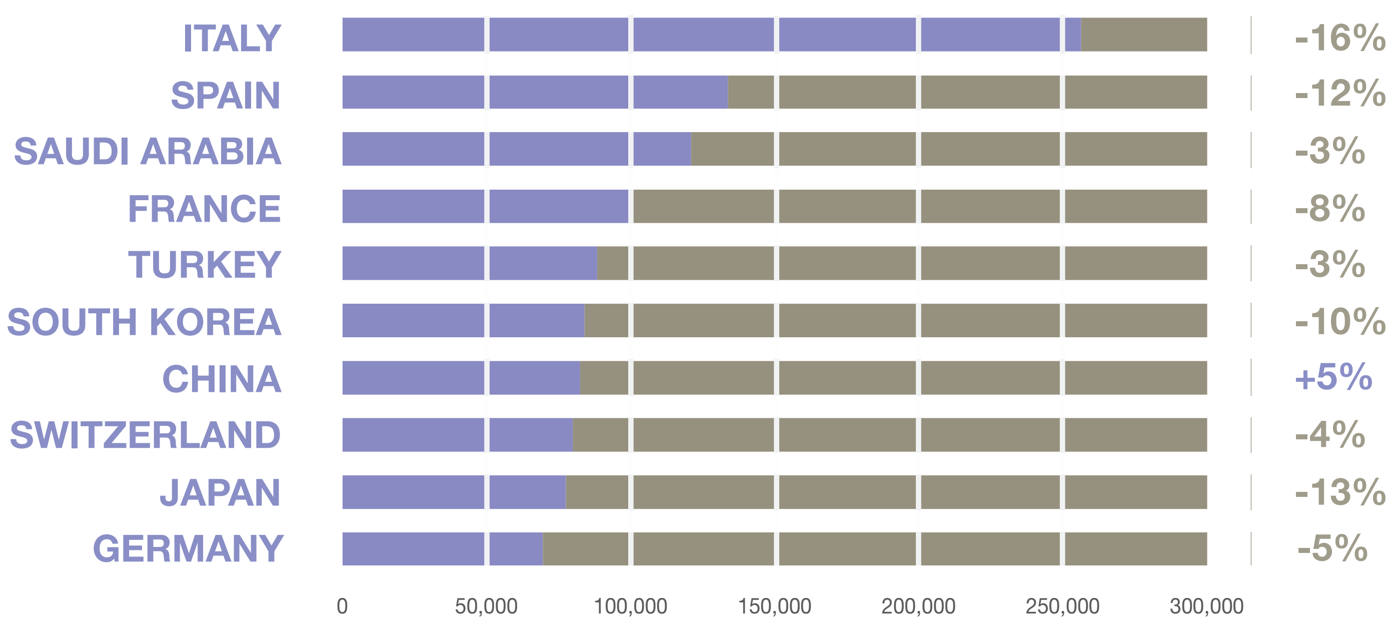
SOURCE REGIONS

PERCENTAGE OF TOTAL STUDENT WEEKS*



TOP SOURCE MARKETS

STUDENT WEEKS & 2014/2015 CHANGE*

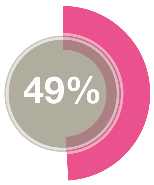


* DATA REFERS TO PRIVATE SECTOR MEMBER CENTRES ONLY.

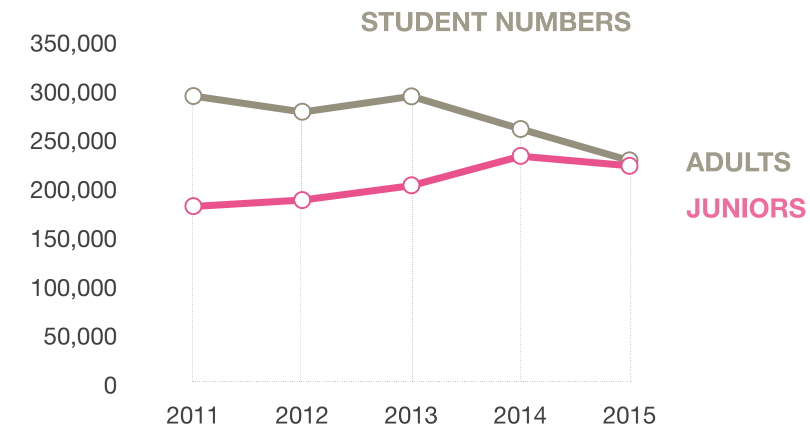
INFOGRAPHICS

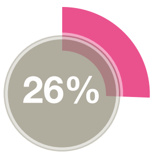
ADULT VS JUNIOR RATIO

BREAKDOWN & TREND DATA*

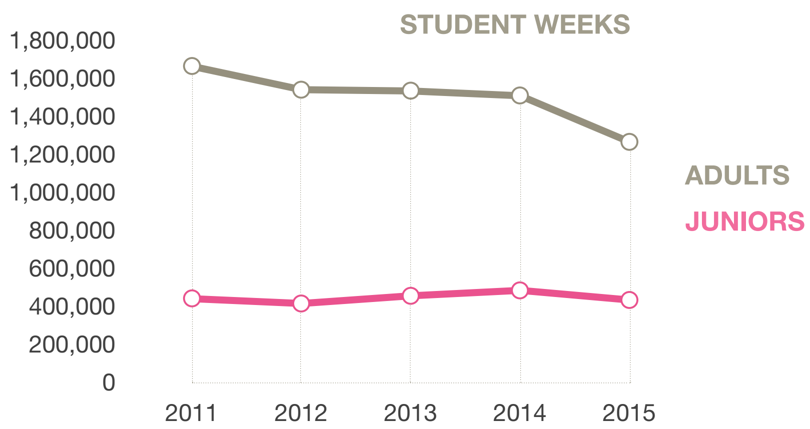


OF ALL **STUDENTS** WERE JUNIORS





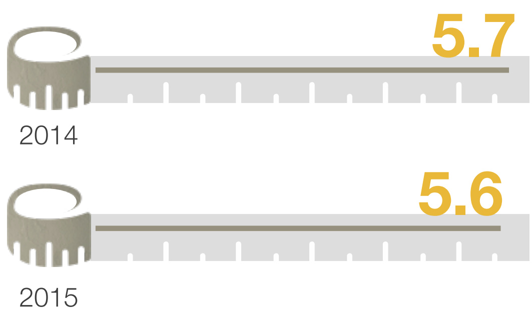
PROPORTION OF **STUDENTS WEEKS** SPENT BY JUNIORS



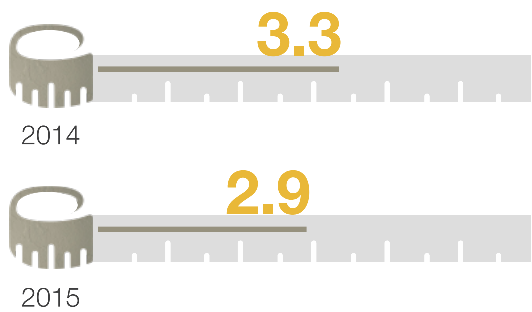
LENGTH OF STAY

AVERAGE NUMBER OF WEEKS*

ADULTS



JUNIORS



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