ENGLISH UK

student statistics report

05/2017

executive summary

englishuk.com

STUDENT STATISTICS REPORT 2016 – EXECUTIVE SUMMARY

Prepared on behalf of:

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INTRODUCTION

We are pleased to present our latest student statistics report. As the third report produced in partnership with StudentMarketing, it offers historical comparative analysis of industry trends alongside sophisticated source market evaluation for the UK's English language teaching (ELT) sector.

English UK's mission is to lead the UK ELT industry to success, through innovation and intelligence. We understand the importance of sophisticated, robust and timely market intelligence in helping our members and the association to make well-informed, innovative and brave business decisions, especially in the uncertain and challenging operating environment we now face.

Our statistics show the industry has experienced a third successive year of decline. It has already been undergoing seismic structural shifts as it matures, with competition between host countries coming into ever-sharper focus. To this, we can now add the uncertainty created by external factors including the UK's exit from the European Union, elections in Europe and 'Trumpism'.

In this time of uncertainty and challenge, English UK is ambitiously leading the way. It is clear that we are already producing high quality statistical reporting in a more timely fashion than other major ELT destination countries: an overview of the global ELT market in 2016 was unavailable at the time of compiling this report (an addendum featuring the global perspective and benchmarking with the UK will be provided in the second quarter of 2017).

This report is only the start. Future improvements to our statistics schemes are already in the pipeline, as we lead an ELT industry that is professional, innovative, intelligence-led and thriving.

METHODOLOGY

The core data used in this report was collated from English UK annual member declarations returned between 2006 and 2016.

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

- Compared to 2015, overall student weeks and student numbers both decreased in 2016 (by 13% and 11%, respectively).
- The study revealed that the highest share of student weeks was in the London (27%) and South and South Eastern England (24%) regions.

State sector member centres

- The 73 state sector member centres reported a total of 315,168 student weeks in 2016.
- Compared to 2015, both the membership pool and students weeks declined (77 centres and 342,083 student weeks in 2015).
- The majority of the state sector students applied under the Tier 4 visa (58%).

Private sector member centres

- Compared to 2015, the number of private sector member centres dropped by 20 to 368 centres.
- In total, approximately 401,596 students and 1,472,212 student weeks were taught in private sector member centres in 2016. Both indicators showed a decline when compared to 2015 (by 12% and 14% respectively).
- The number of private sector member centres offering junior programmes increased by 18 centres to 276.
- The average number of junior students per private sector member centre that enrols junior students was 736, whilst the average number of adults per centre was 680.
- The top five sending markets in 2016 were Italy (15.2% of total student weeks), Saudi Arabia (9.6%), Spain (7.5%), France (5.9%), and China (5.8%).
- Most of the growth came from Saudi Arabia (+20,131 student weeks), Kuwait (+7,433), and Argentina (+3,409); while the largest declines came from Italy (-32,158), Libya (-29,666), and Spain (-23,015).
- The junior to adult ratio in private sector member centres tilted towards juniors in 2016, who represented 51% of the overall student population in private sector member centres.
- Junior students' average length of stay in 2016 stood at 2 weeks. Adults stayed in the private sector member centres for 5.3 weeks on average. Both values were similar to the previous year.
- Regions where junior students formed the majority of the student population, were Central England (68% of all students were juniors), South and South Eastern England (63%), and South West England and The Channel Islands (57%).

INFOGRAPHICS

ENGLISH UK MEMBERSHIP IN FIGURES

OVERALL DATA

441
MEMBER CENTRES

-24
VS 2015

476,920
STUDENTS

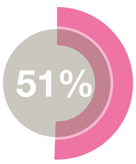
-11%
VS 2015

1,787,380
STUDENT WEEKS

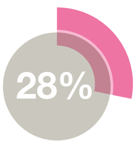
-13%
VS 2015

ADULT VS JUNIOR RATIO

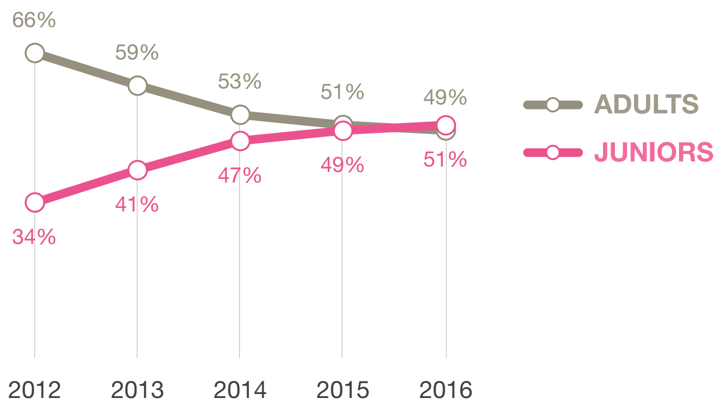
BREAKDOWN & HISTORIC TREND*



OF ALL
STUDENTS
WERE JUNIORS



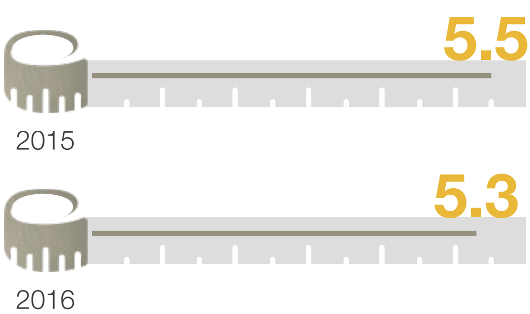
PROPORTION OF
STUDENTS WEEKS
SPENT BY JUNIORS



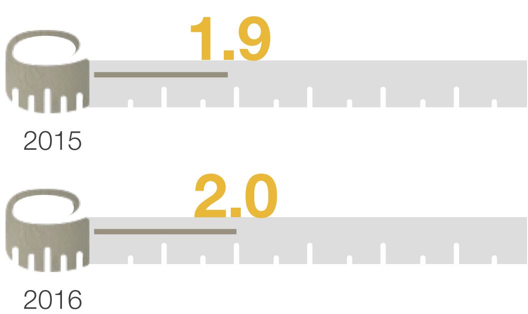
LENGTH OF STAY

AVERAGE NUMBER OF WEEKS*

ADULTS



JUNIORS

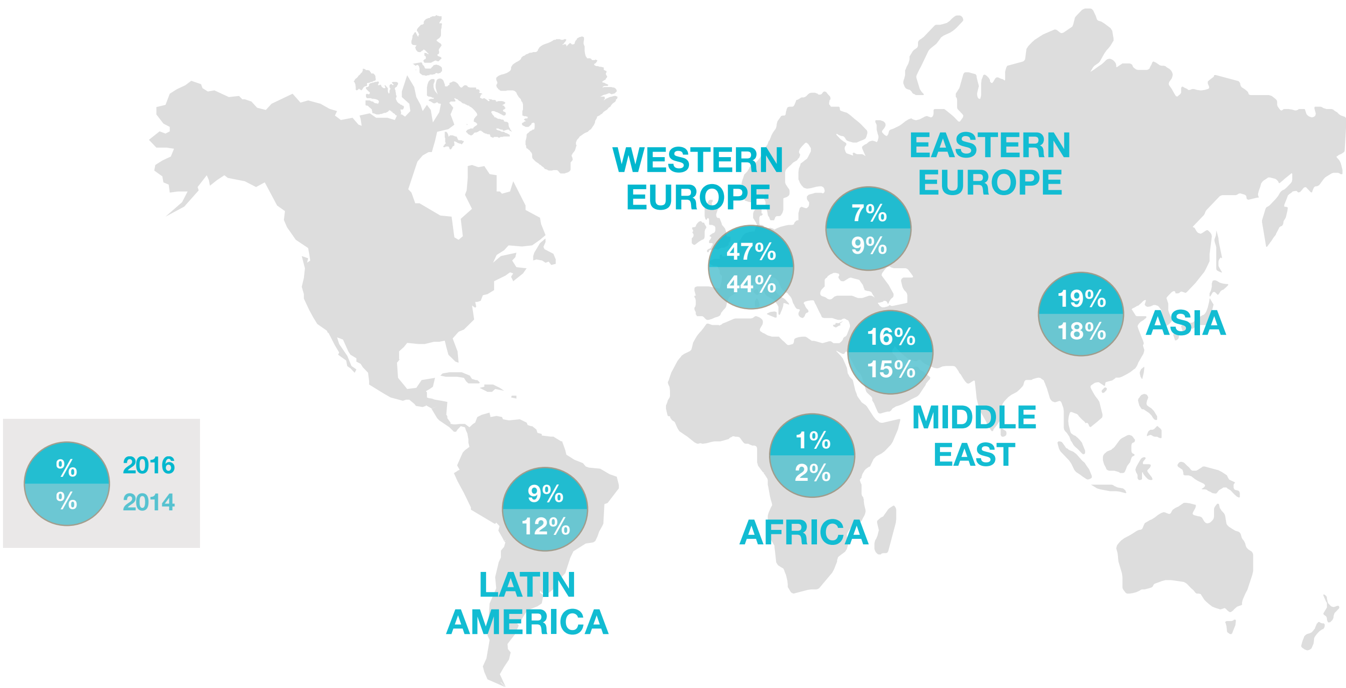


* DATA REFERS TO PRIVATE SECTOR MEMBER CENTRES ONLY.

INFOGRAPHICS

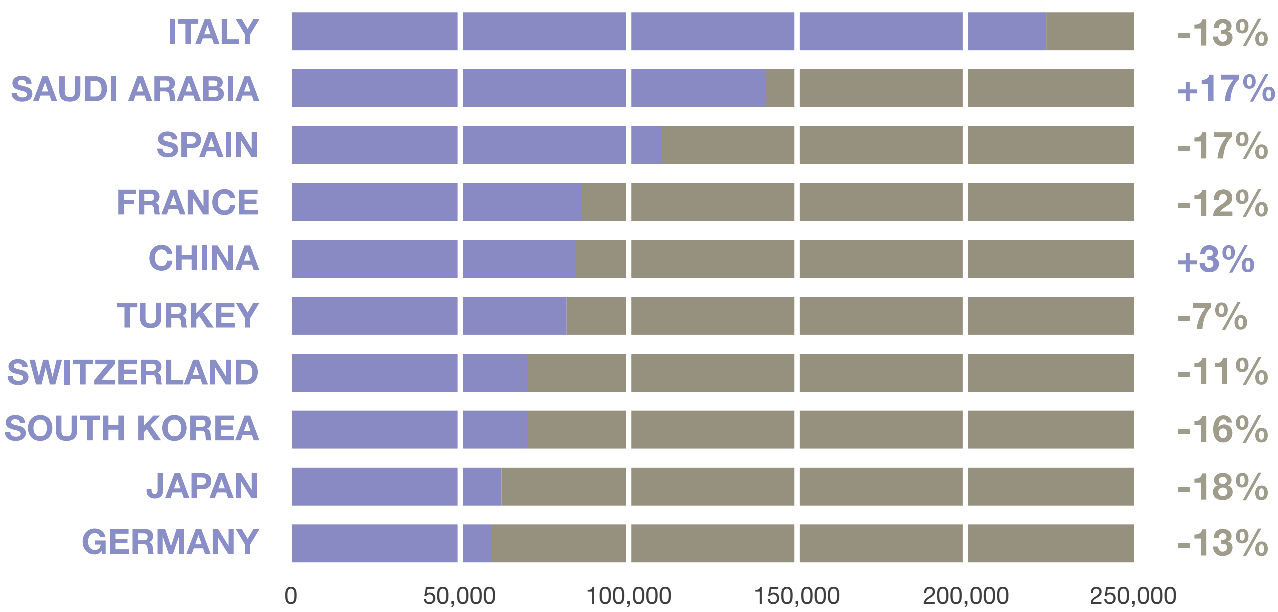
SOURCE REGIONS

PERCENTAGE OF TOTAL STUDENT WEEKS*



TOP SOURCE MARKETS

STUDENT WEEKS & Y-O-Y CHANGE*



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