Student Statistics Report 2019

ENGLISH LANGUAGE STUDENTS IN THE UK IN 2018

05/2019

Executive Summary

englishuk.com

STUDENT STATISTICS REPORT 2019 – EXECUTIVE SUMMARY

Prepared on behalf of:

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INTRODUCTION

Improving the intelligence we provide to members is at the heart of our mission, and so we are delighted to bring you the fifth student statistics report created with our insight partner BONARD.

We constantly make improvements to the scale, scope and detail of the information and analysis this report brings, and this year is no different. After last year's innovation of providing detailed state sector analysis, we are now building on that to bring trend data and historical analyses which will help member centres seeking to maximise business opportunities.

While the report contains broadly good news for UK ELT, with some building on last year's recovery, there is much for business analysts and members to pore over.

English UK private sector members welcomed one per cent more students but saw a simultaneous decline in student weeks. And though overall the state sector saw an upturn in both, 40 per cent of universities and FE colleges experienced declining numbers.

These are issues all our members will want to address in the coming year, supported by not only the wealth of detail provided by this report but also with our quarterly statistics scheme, QUIC. QUIC gives much more of a real-time snapshot of market shifts and trends and helps centres in membership to benchmark their performance to become the best they can be. We believe QUIC is at present the gold standard of ELT data – particularly used in conjunction with the student statistics report.

As always, it is our aim and aspiration to keep on improving in order to help our members improve. We will be looking at how to take forward our ambitious 2018 data pilot project to create even richer intelligence for the UK's ELT industry, supporting it to succeed against competitor nations in these challenging times.

METHODOLOGY

The core data in this report was collated from English UK annual student data submissions returned between 2008 and 2018.

ACCESS THE FULL REPORT

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

www.englishuk.com/resources-and-reports/uk-elt-data

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

KEY FINDINGS

General overview

- In 2018, the English UK membership comprised 419 centres, which taught approximately 504,868 students and delivered a total of 1,866,835 student weeks.
- The number of English language learners at English UK member centres rose by 2% while the student week figure recorded a slight drop (0.9%) compared to 2017. This development was partially caused by English UK membership contracting by 15 members.
- While the UK attracted 5% more adult students, the number of students under the age of 18 declined by 1%. Nonetheless, they represent 51% of all enrolments at English UK member centres.
- The study revealed that the highest share of student weeks was spent in the London region despite a decline in its market share from 28% in 2017 to 26% in 2018. The strongest growth was recorded in Northern England (+23,075 weeks, or 9%).
- Markets outside the European Union (EU) generated 63% of all student weeks, and accounted for 43% of students.

State sector member centres

- The state sector welcomed 34,795 English language students who cumulatively spent 308,387 weeks. The figures translated into a considerable y-o-y increase of 10.5% and 11% respectively.
- The share of junior student population increased from 10% in 2017 to 13% in 2018 and represented 3% of the total student weeks at state sector providers.
- The course duration increased from 8.8 weeks to 9.2 weeks, with adult students staying for an average of 10.3 weeks and juniors for 2.1 weeks.
- In 2018, the top five sending markets for the state sector were China (42.8% of total student weeks), Poland (7.8%), Japan (6.9%), Saudi Arabia (6.8%) and Spain (4.1%).
- Based on the data from centres responding in both 2017 and 2018, the top growing markets for the state sector were China (+17,058 weeks), Romania (+2,929) and Poland (+1,528).
- The biggest declines were registered for Taiwan (-1,049 weeks), Panama (-427) and Kazakhstan (-412).

Private sector member centres

- The 360 private sector member centres welcomed 470,073 English language students, which represented a 1% y-o-y growth. At the same time, student weeks dropped by 3% to 1,558,448.
- The under-18 age group comprised 54% of the overall student population at private sector member centres despite facing a 2% dip.
- The average length of stay of an adult student decreased from 5.3 weeks to 5 weeks y-o-y. Juniors stayed for an average of 1.8 weeks (1.9 weeks in 2017).
- The top five source countries in 2018 were Italy (16.2% of total student weeks), Saudi Arabia (9.5%), Spain (7.2%), China (6.1%) and France (5.6%).
- Saudi Arabia (+15,154 weeks), Argentina (+4,776) and Chile (+4,095) represented the leading growth markets.
- The countries with the steepest declines were Italy (-13,355), Turkey (-11,949) and South Korea (-8,087).

OVERALL DATA

ENGLISH UK MEMBERSHIP OVERVIEW

MARKET SIZE

419
REPORTING CENTRES

-9
VS 2017

504,868
STUDENTS

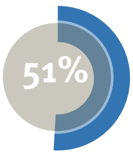
+2%
VS 2017

1,866,835
STUDENT WEEKS

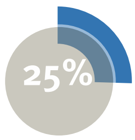
-0.9%
VS 2017

AGE SEGMENTS

MARKET SHARES



OF ALL
STUDENTS
WERE JUNIORS

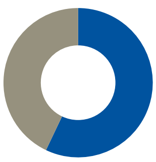


PROPORTION OF
STUDENTS WEEKS
SPENT BY JUNIORS

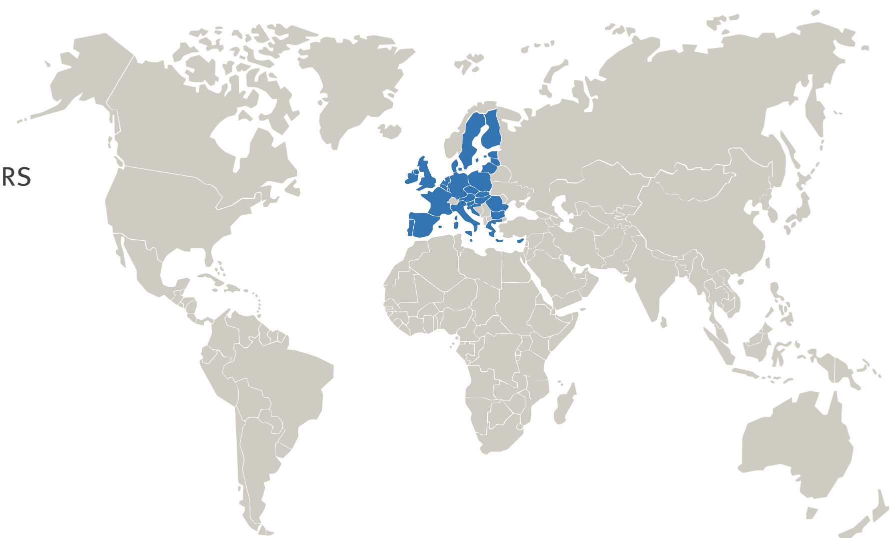
STUDENT ORIGIN

MARKET SHARES

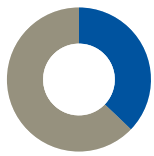
STUDENT NUMBERS



NON-EU EU



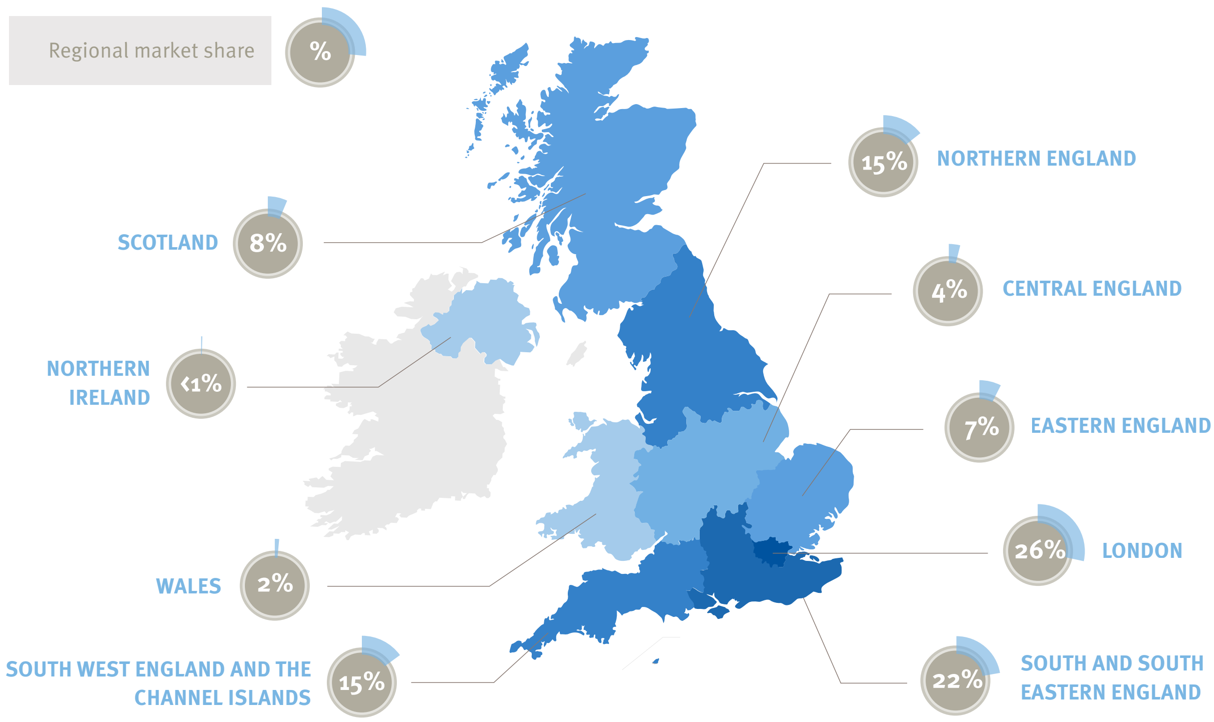
STUDENT WEEKS



NON-EU EU

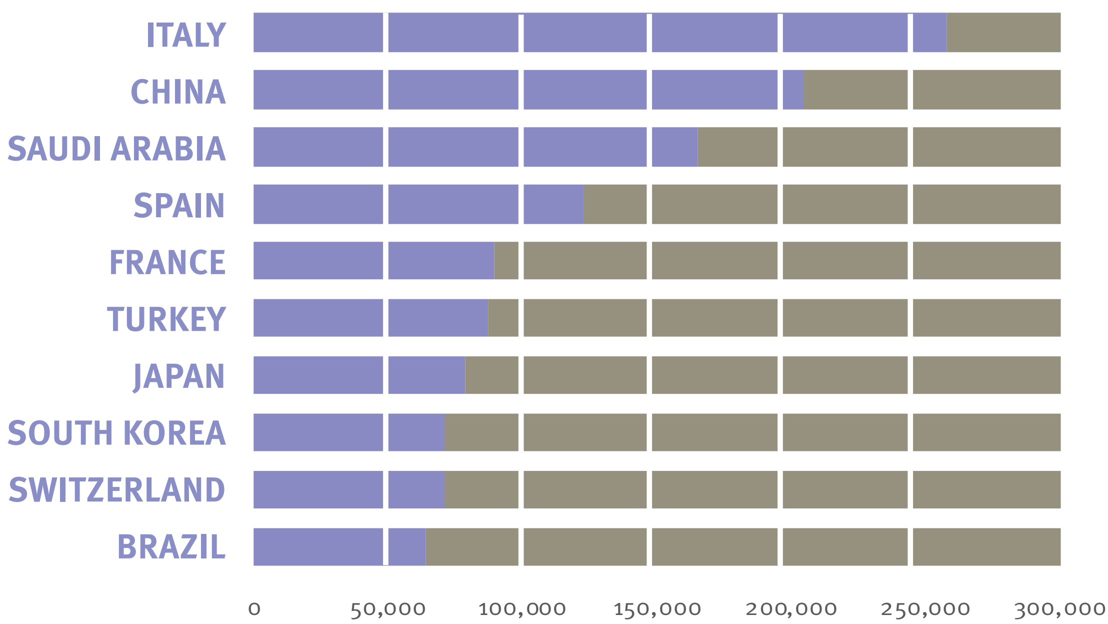
REGIONAL OVERVIEW

PERCENTAGE OF TOTAL STUDENT WEEKS



TOP SOURCE MARKETS

STUDENT WEEKS



STATE SECTOR

STATE SECTOR OVERVIEW — MARKET SIZE

59
REPORTING CENTRES

-8
VS 2017

34,795
STUDENTS

+10.5%
VS 2017

308,387
STUDENT WEEKS

+11%
VS 2017

AGE SEGMENTS — MARKET SHARES

13% OF ALL **STUDENTS** WERE JUNIORS

3% PROPORTION OF **STUDENTS WEEKS** SPENT BY JUNIORS

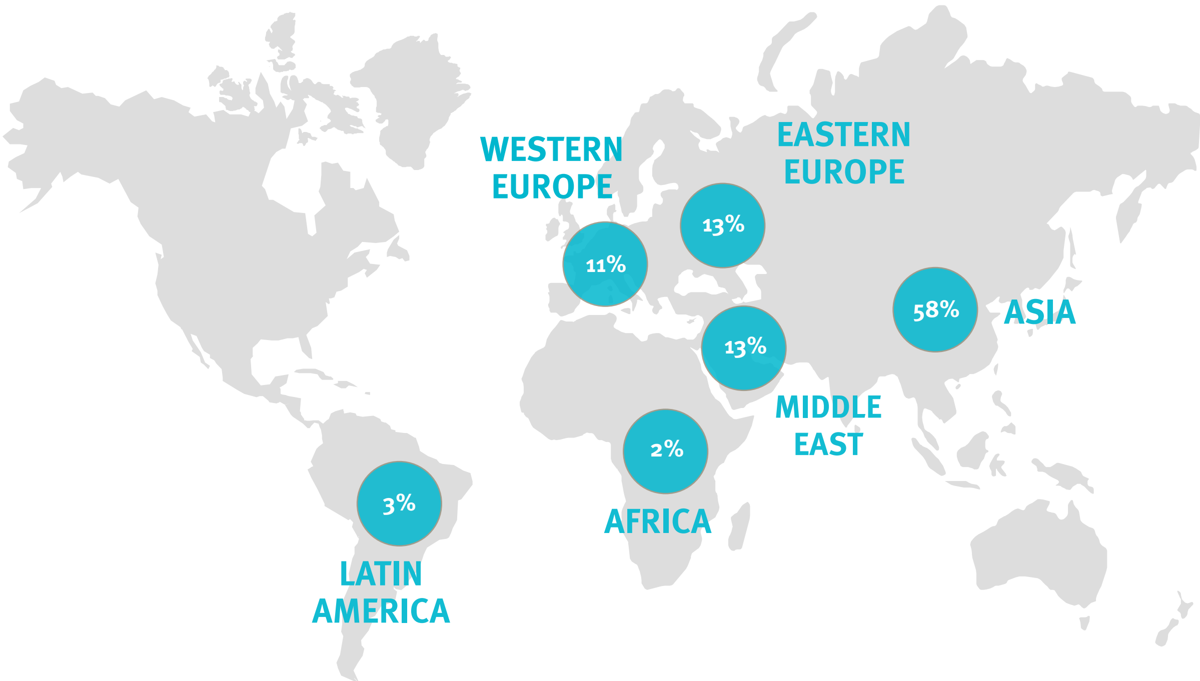
AVERAGE LENGTH OF STAY — WEEKS

ADULTS
10.3

JUNIORS
2.1

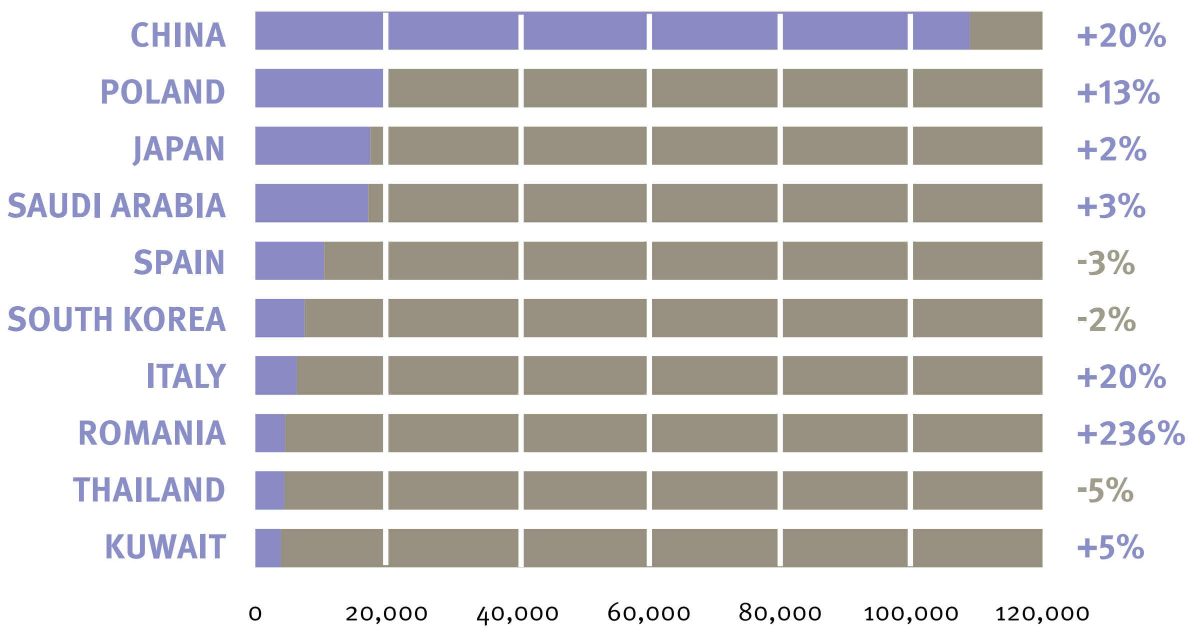
SOURCE REGIONS

PERCENTAGE OF TOTAL STUDENT WEEKS



TOP SOURCE MARKETS

STUDENT WEEKS & Y-O-Y CHANGE



PRIVATE SECTOR

PRIVATE SECTOR OVERVIEW — MARKET SIZE

360
REPORTING CENTRES
-1
VS 2017

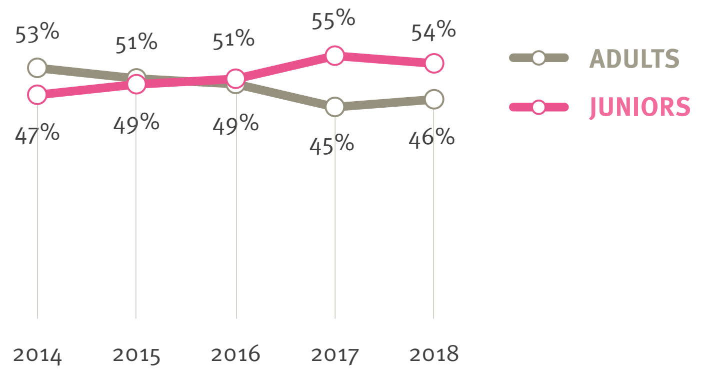
470,073
STUDENTS
+1%
VS 2017

1,558,448
STUDENT WEEKS
-3%
VS 2017

AGE SEGMENTS — MARKET SHARES & HISTORIC TREND

54%
OF ALL **STUDENTS** WERE JUNIORS

30%
PROPORTION OF **STUDENTS WEEKS** SPENT BY JUNIORS



LENGTH OF STAY — WEEKS

ADULTS

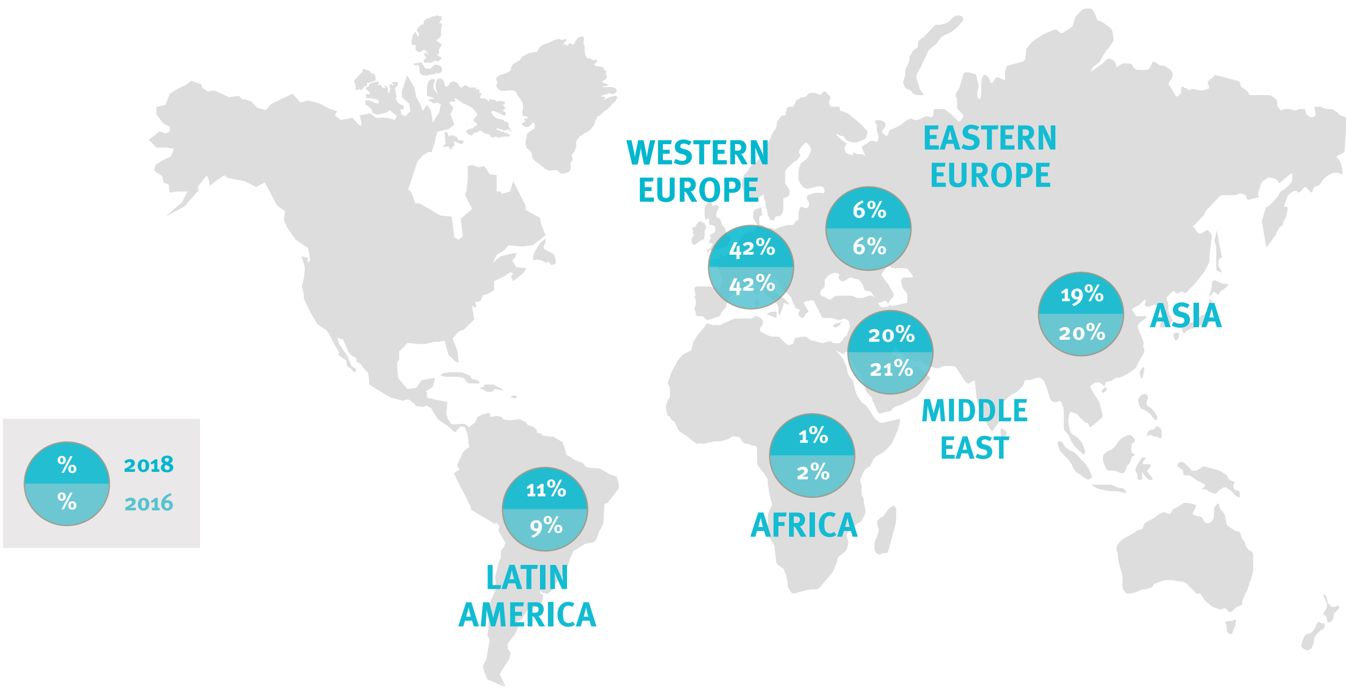
2017: 5.3
2018: 5.0

JUNIORS

2017: 1.9
2018: 1.8

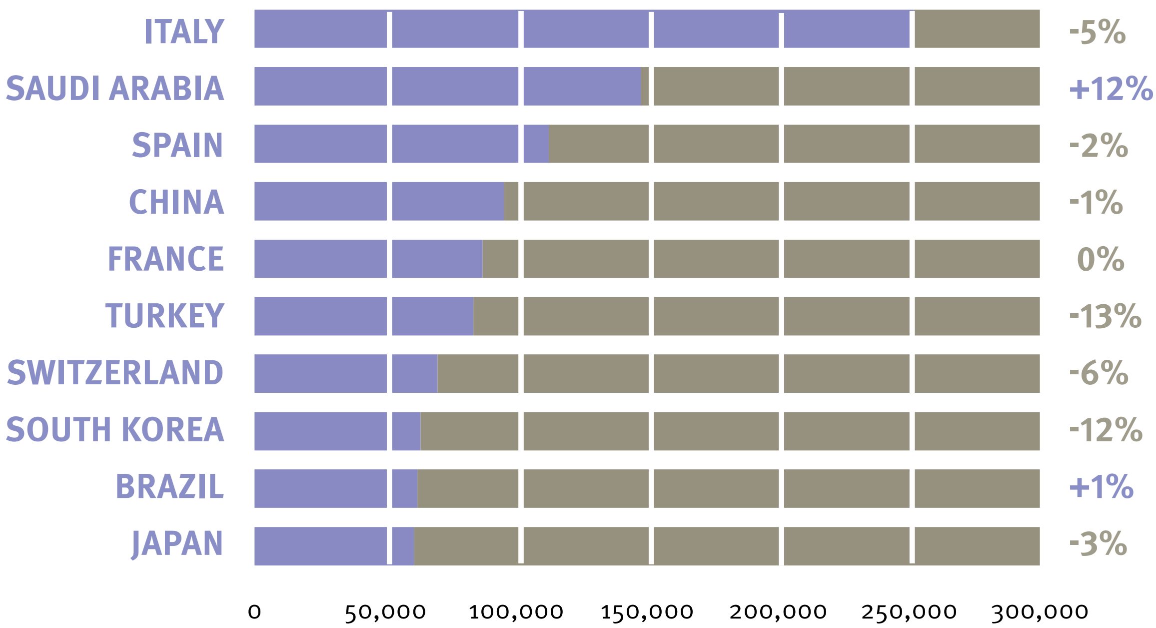
SOURCE REGIONS

PERCENTAGE OF TOTAL STUDENT WEEKS



TOP SOURCE MARKETS

STUDENT WEEKS & Y-O-Y CHANGE



ENGLISH UK

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