

Review of 2010

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2 reviews, a JR and an election

- Labour's review – panic measures!
- Exhausted political lobbying means of influence – EDM, adjournment debate, meeting of MPs and Minister (Woolas)
- JR – established principles that law cannot be made via 'guidance' and 'guidance' can relax law not tighten it
- Underlying politics – immigration more important to voters than economy (yes really)

The Long Coalition?

- ‘Reducing net migration from the hundreds to the tens of thousands’ NOT in Coalition Agreement
- Impossible to prove because of IPS data – those coming to study less those leaving to study - but NOT those who came to study!
- 2010 GE bad for APPG because it left Labour as the ‘opposition party’

And more politics

- APPG reforming – just made the 10 Labour MPs and peers required
- Strong support from ‘old guard’ (Syms, Smith, Slaughter, Sanders, Brazier)
- And also from new MPs (Lloyd, Burns, Huppert, Lucas, Blackwood)
- Briefing on current issues and plan to meet the Minister (though Green is not the problem)

English UK as an organisation

- Membership grew from 435 to 454
- Corporate members – from 29 up to 37
- Surplus of £70K on year but £45K due to JR costs reclaim from Government – retained as a ‘lobbying fund’ for work on visa issues
- Other income down – low interest rates, income on student insurance down
- Good result from StudyWorld 2010

Accreditation matters

- 85% penetration rate maintained
- 33% of centres fail first inspection
- Numbers coming through ACS now dropping
- Self-assessment input – conference session
- Review of points of excellence and reporting
- Push for more positive inspection reports – rare to get ‘excellent’ in teaching and learning but we claim UK is high quality?

Professional Services

- Teachers' Conference – record sellout with 272 delegates
- Successful conferences on Marketing, ELT Management, Business English Trainers, Student Experience
- 2 cohorts of WOCC for first time since 1998
- CRB checks up from 633 to 1300
- DELTM updated and validated by TCL

Professional Services 2

- Cambridge Placement Test agreement with Cambridge ESOL
- Leadership forum to steer CPD developments
- Development of proposals for new professional association for individual members
- 31 training days, some outside London

Marketing and promotions

- English UK Partner Agency Scheme launched
- Profile raising and briefing events in 13 locations from Argentina to Vietnam
- English UK Fairs in Dubrovnik and Hanoi
- Inward missions from the Americas, China (summer programmes) and central/southeast Europe
- New Agents' Guide

Marketing and promotions 2

- New student guide 'English in the UK' with BC
- StudyWorld 2010 – new 'agent zone' and lightweight event guide with all key info on USB stick as part of environmental responsibility
- Regular activity such as agent newsletters re student visa changes
- Team re-structure

The market

- 2008 – based on 332 private sector member centres – total 1,866,000 student weeks (SW) or 5,620 SW per centre average
- 2009 – 348 centres, 1,986,000 SW total, average 5,707 per centre – 1.5% increase on 2008
- 2010 – 362 centres, 2,161,234 SW total, average 5,970 SW per centre, 4.6% increase on 2009

State sector

- 2008 – 97 centres, 410,660 SW, average 4,234 per centre
- 2009 – 93 centres, 417,465 SW, average 4,489 per centre – increase of 6% on 2008
- 2010 – 92 centres, 416,684 SW, average 4,529 per centre – increase of under 1% on 2009

The market 3

- Average length of stay of adult students appears to be dropping slightly – just under 7 weeks on average
- Average length of stay of junior students rising markedly – now 3 weeks
- Adult students – 259,370 private, 63,534 state, total 322,904
- Juniors – 121,306 private, 11,138 state, total 132,444
- Grand total of 445,348 students attending English UK member centres in 2010

The market 4 – top countries

- 2008: S Korea, Spain, Italy, S Arabia, Turkey
- 2009: S Arabia, Spain, Italy, S Korea, Turkey
- 2010: Spain, Italy, S Korea, Turkey, S Arabia
- Colombia at 7
- Rest of Middle East stays at 8
- Rest of Far East up from 20 to 18
- 10 EU countries in top 20 account for 37% of SW

Conclusion

- 2010 a hectic, challenging but surprisingly good year on almost all fronts
- 2011 likely to prove much more difficult – probable first reverse of numbers since 2005
- Still a very resilient sector and UK remains an aspirational study abroad destination
- English UK played above its game throughout the year – immense amount of activity for small outfit

Thanks!

- To all members for your support and action locally
- To sponsors, esp Cambridge ESOL, stakeholders and other sector bodies
- To Board and APSB, Ents and Finance Panel
- To the team

www.englishuk.com

www.englishukfairs.com

www.studyworldfair.com

