

student statistics report

05/2017



STUDENT STATISTICS REPORT 2016

Copyright © 2017 English UK

Prepared on behalf of:



English UK

219 St John Street, London EC1V 4LY, United Kingdom | +44 20 7608 7960

www.englishuk.com | info@englishuk.com

Prepared by:



StudentMarketing Ltd.

Salztorgasse 2, 1010 Vienna, Austria | +43-650-612-4527

www.student-market.com | research@student-market.com

TABLE OF CONTENTS

FOREWORD	4
METHODOLOGY	6
EXECUTIVE SUMMARY	7
GENERAL OVERVIEW	8
The UK at a glance	8
STATE SECTOR MEMBER CENTRES	10
Market overview	10
PRIVATE SECTOR MEMBER CENTRES	11
Market overview	11
Source regions	12
Source markets	14
Adult vs junior segment	20
CONCLUSIONS	22

FOREWORD

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). For us, this report is only the start.

Our new statistics initiative, the Quarterly Intelligence Cohort (QUIC), gives English UK member centres quarterly, in-depth reports by StudentMarketing. QUIC helps members identify emerging market trends and opportunities, ensuring time-critical business decisions are based on robust data.

This development is significant and very exciting. We encourage all members who have not already done so to join QUIC at the next available opportunity in December 2017.

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.

I hope you find the insights in the following pages useful. As ever, we are grateful for the cooperation of our member centres, without whom this report would not be possible.

Sarah Cooper
Chief Executive
English UK

Two years ago, the UK's ELT industry was battling with the impact of a strong pound, increased competition from other destinations, and uninviting visa policies. For 2016, the common denominator shaping the direction of the industry was undoubtedly the referendum on the UK's exit from the European Union. Weakening of the pound, triggered by the results of the EU referendum, certainly helped the UK attract students that were previously put off by the costs attached to studying in the UK. Nevertheless, it did not manage to prevent another year of decline for the UK's ELT industry. However, the full effects of the referendum result will be reflected in 2017 figures.

Meanwhile, although a comprehensive overview of the global ELT landscape in 2016 was unavailable at the time of compiling this study, first indications from the likes of Ireland and Malta show the market in these study destinations either grew, or decreased to a lesser extent than in the UK. The global perspective data and benchmarking with the UK will be provided after the publication of this report (Q2 2017).

In some respects, 2016 introduced a new face of the UK as an English language destination. For the first time in history, English UK members taught more junior than adult students, and among other recent events, China now belongs to the top 5 source markets for the UK. The previous year also hinted a possible way forward for 2017. Available data enabled more targeted marketing in 2016, and we trust this strategy will pay off this year as well.

This report, as the third in a row that we have produced for English UK, can offer new elements such as historical trends and comparisons. It also features the regional share of junior students among the total student population.

We hope this edition will serve as a valuable benchmark for English UK members.

Samuel Vetrak
Chief Executive Officer
StudentMarketing

METHODOLOGY

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

Each chart contains a descriptive note underneath to state the origin and provenance of its data.

Due care and attention was paid to align the annual data as much as possible. Notwithstanding, some of the figures in this report may not be directly comparable for the following reasons:

- The number of state and private sector centres in the English UK membership fluctuates year on year.
- English UK's private and state sector members provide their student figures in different ways. Private sector centres collect more detailed information about student age and country of origin. Public sector members provide only an annual ELT student week figure.

Note: A student week is defined as one student taking 10 or more teacher-taught hours in one week.

EXECUTIVE SUMMARY

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 enrolls 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%).

GENERAL OVERVIEW

THE UK AT A GLANCE

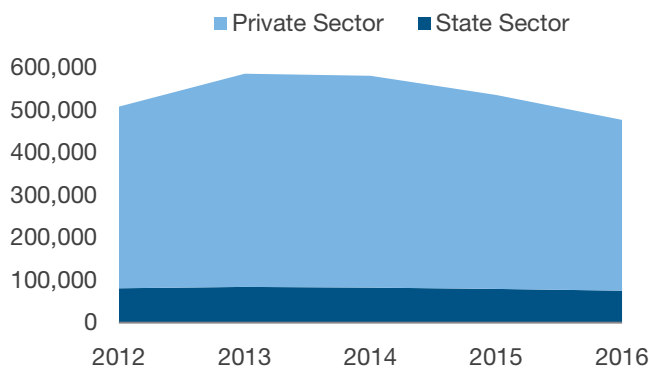
In 2016, there were 441 English UK members. Cumulatively, member centres welcomed approximately 476,920 students who spent a total of 1,787,380 weeks learning English.

The figures represent a drop of 11% in terms of student

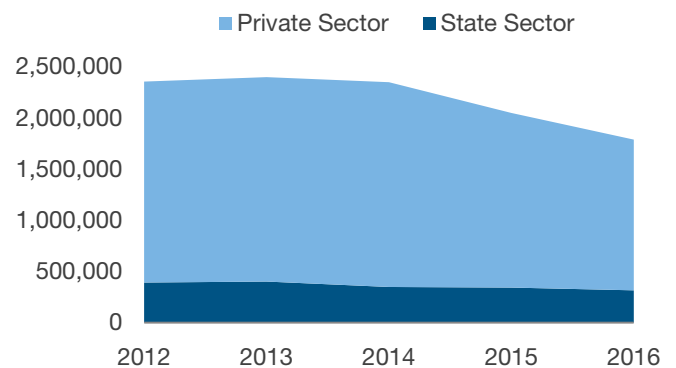
numbers, and 13% in student weeks compared to 2015. Although there was revived interest in the UK towards the end of the year thanks to more favourable exchange rates, 2016 developed into the third consecutive year of decline for the UK's ELT industry.

Chart 1: Overall number of students and student weeks taught by English UK member centres

STUDENT NUMBERS

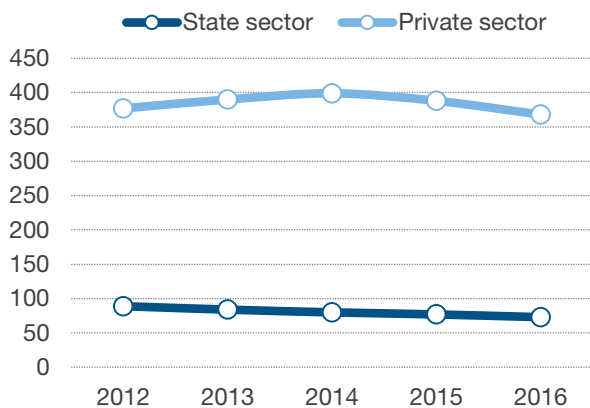


STUDENT WEEKS



Source: English UK, 2012-2016

Chart 2: Number of English UK member centres by sector



Source: English UK, 2012-2016

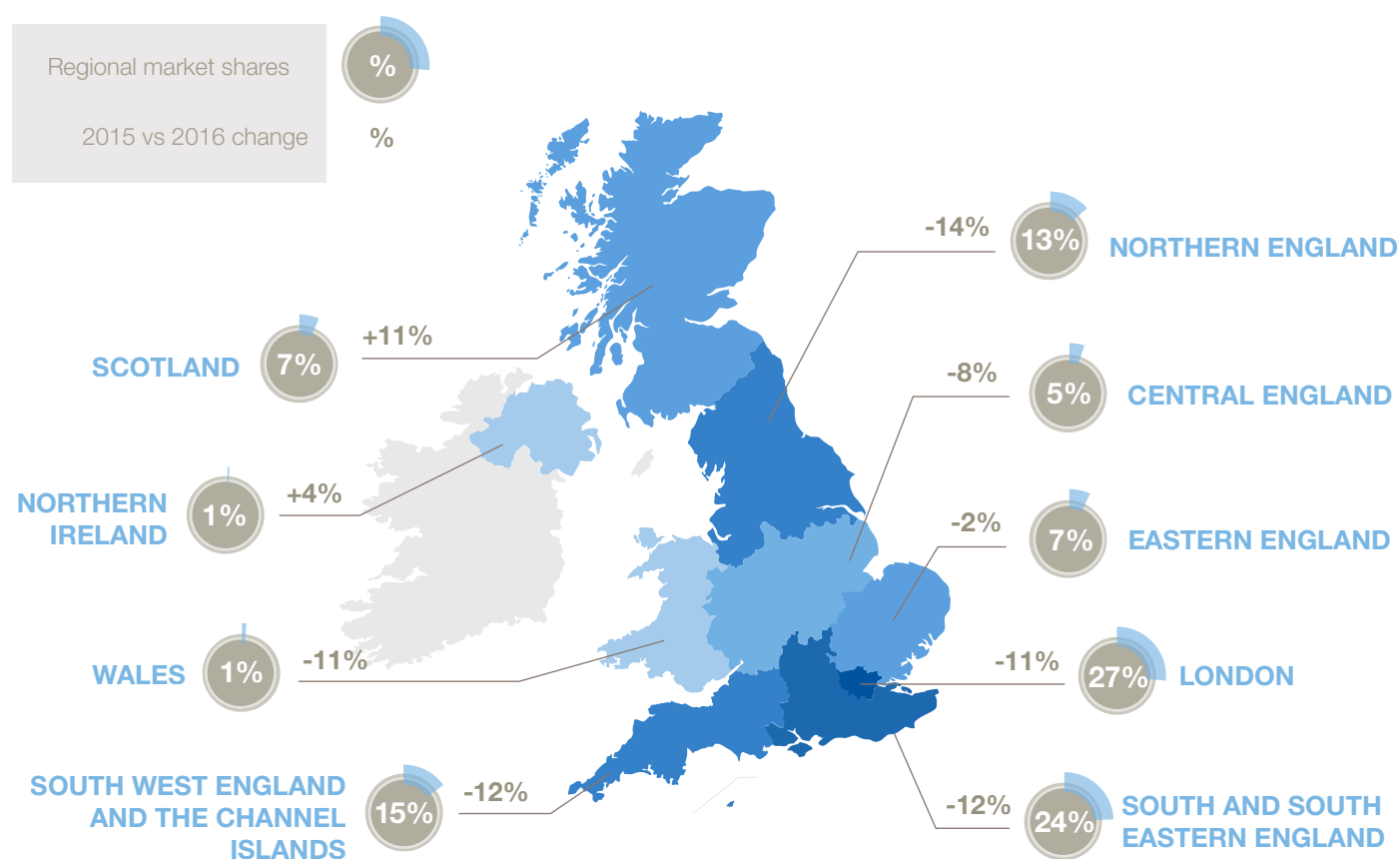
The downswing can be partially attributed to a smaller number of centres in English UK membership compared to 2015. Overall, the member base shrank by 24 centres, with many of these as a result of closures or mergers.

An analysis of member centres in both 2015 and 2016 was conducted to offset the fluctuations in English UK membership, and to provide a more accurate insight on year-on-year performance. The results point to a decline of 10% in student weeks in real terms.

When measuring only those centres that reported for both 2015 and 2016, the following comparison can be made:

	Student weeks
2015 (n=433)	1,977,412
2016 (n=433)	1,782,169

Chart 3: Regional market share (2016) and 2015 vs 2016 change in student weeks



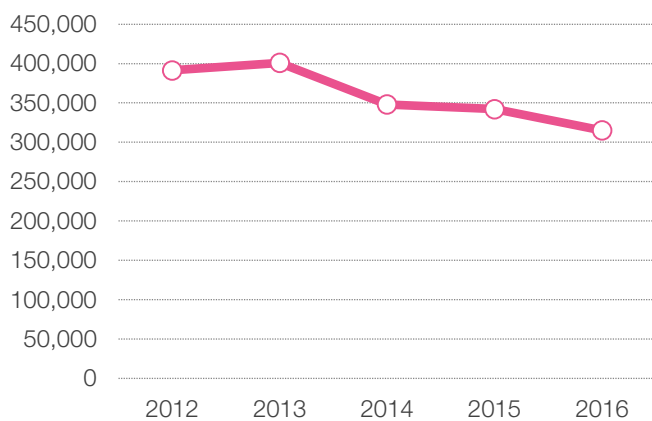
Source: English UK, 2016

From a geographical perspective, more than half of all student weeks were taught in the London area (27%) and South and South Eastern England (24%). Both regions also faced a slight drop in their market share (by 1% and 2% respectively).

Regions experiencing actual growth in student weeks were Scotland (+11,227 weeks, representing an increase of 11%) and Northern Ireland (+372 weeks, representing an increase of 4%).

STATE SECTOR MEMBER CENTRES MARKET OVERVIEW

Chart 4: Number of student weeks taught by English UK state sector members



Source: English UK, 2012-2016

The 73 state sector member centres in 2016 comprised of 28 higher education (HE) and 45 further education (FE) institutions. Attending students generated approximately 315,168 student weeks in total (public sector member centres only provide an annual ELT student week figure).

An average English UK state sector member centre reported 4,317 student weeks in 2016. In 2015, there were 77 state member centres that produced 8% fewer student weeks (342,083 in total) than in 2016.

When measuring only those centres that reported for both 2015 and 2016, the following comparison can be made:

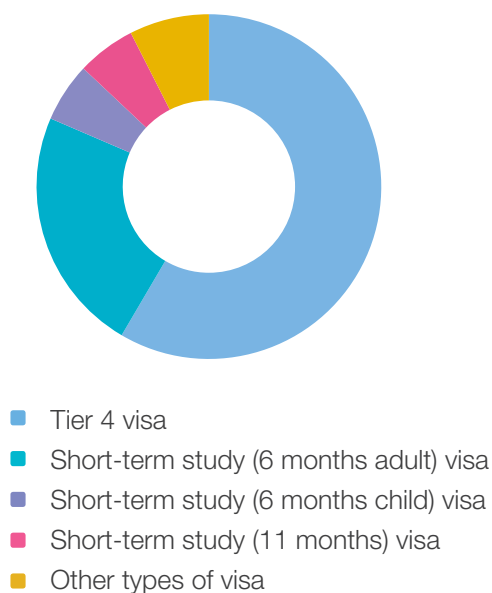
	Student weeks
2015 (n=73)	338,869
2016 (n=73)	315,168

Note: Public sector member centres only provide an annual ELT student week figure.

Out of all students enrolled in state sector members, 58% applied under a Tier 4 visa, followed by 23% of students under Short-term study (6 months adult) visa. The share of students by visa type have remained comparable to those in 2015 and 2014.

Nevertheless, the growing importance of the younger students to the UK can be increasingly observed in the state sector as well. The proportion of students studying at HE or FE colleges under the Short-term study (6 months child) visa rose from 2% in 2014 to 6% in 2016.

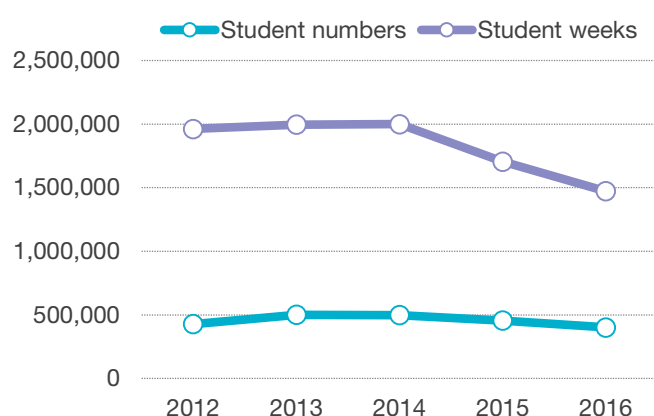
Chart 5: Student numbers by visa type (state sector)



Source: English UK, 2016

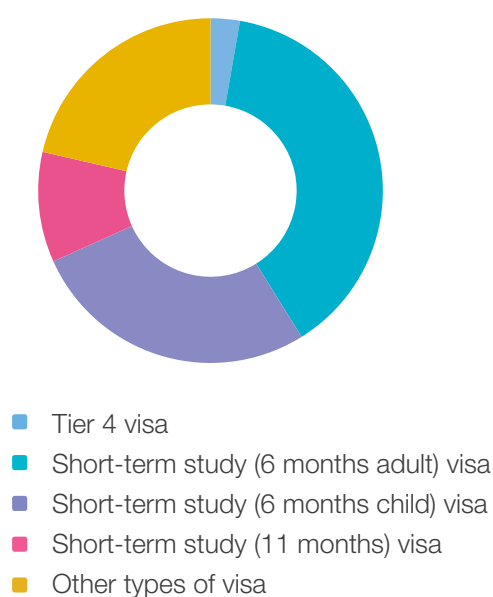
PRIVATE SECTOR MEMBER CENTRES MARKET OVERVIEW

Chart 6: Number of students and student weeks taught by English UK private sector members



Source: English UK, 2012-2016

Chart 7: Student numbers by visa type (private sector)



Source: English UK, 2016

Private sector membership consisted of 368 centres in 2016. Despite adding eight new centres in 2016, the overall number of members fell from 388 in 2015. Centres reported 401,596 students and 1,472,212 student weeks.

These figures represent a 12% decline in student enrolments and a 14% decrease in student weeks compared to 2015; moreover, the percentage decline in student weeks in private members was more significant than in state sector members (down 8% from 2015).

When measuring only those centres that reported for both 2015 and 2016, the following comparison can be made:

	Student numbers	Student weeks
2015 (n=360)	437,306	1,638,543
2016 (n=360)	400,289	1,467,001

An English UK private sector member centre enrolled an average of 736 juniors in 2016. The number of student weeks averaged out to 1,503. In case of adult students, the figures stood at 680 and 3,634, respectively.

Two thirds of private centre students (66%) studied with either Short-term study (6 months adult) visa or Short-term study (6 months child) visa. Students with other types of visas represent the next significant category (21%).

Between 2014 and 2016, there were a rising number of students enrolled under 'other' visa category (6% in 2014, 13% in 2015, and 21% in 2016). This group of students has been expanding at the expense of students with Short-term study (6 months adult) visa.

PRIVATE SECTOR MEMBER CENTRES

SOURCE REGIONS

Table 1: Number of student weeks, students and average length of stay (weeks) by source region

Source region	Student weeks (2015)	Student weeks (2016)	Change in student weeks (%)	Share (% , 2016)	Student numbers (2015)	Student numbers (2016)	Change in student numbers (%)	Share (% , 2016)	Average length of stay (2016)
Western Europe	800,403	697,085	-12.9%	47.3%	288,209	259,380	-10.0%	64.6%	2.7
Asia	322,489	284,117	-11.9%	19.3%	56,807	53,669	-5.5%	13.4%	5.3
Middle East	245,372	237,012	-3.4%	16.1%	25,716	26,102	1.5%	6.5%	9.1
Latin America	172,014	135,193	-21.4%	9.2%	29,014	25,952	-10.6%	6.5%	5.2
Eastern Europe	132,486	97,522	-26.4%	6.6%	51,790	32,563	-37.1%	8.1%	3.0
Africa	29,949	19,158	-36.0%	1.3%	3,828	3,363	-12.1%	0.8%	5.7
North America	1,869	1,841	-1.5%	0.1%	476	508	6.7%	0.1%	3.6
Australasia	168	284	69.0%	< 0.1%	32	59	84.4%	< 0.1%	4.8

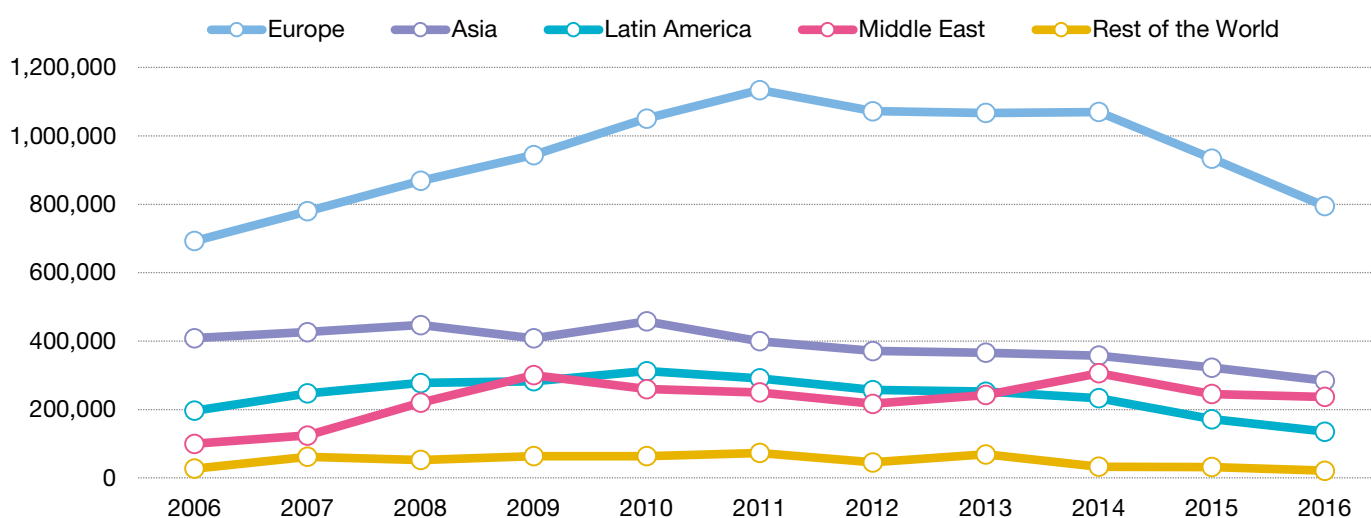
Source: English UK, 2016

Except for a small cohort of students from Australasia, all regions registered a drop in reported student weeks. The most resilient region was the Middle East, which actually grew its student population in the UK by 1.5%.

from Eastern Europe, which could be attributed to students from these countries opting for other destinations (e.g. Ireland). The largest downturn in student weeks (-36.0%) was recorded for Africa.

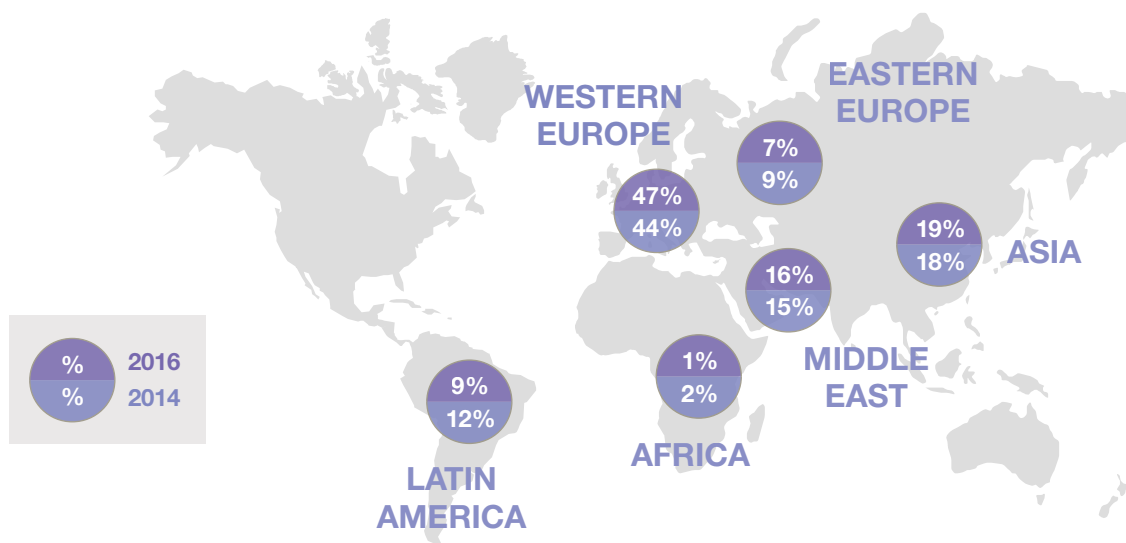
The biggest decline was noticed in the number of students

Chart 8: Number of student weeks by source region (2006-2016)



Source: English UK, 2006-2016

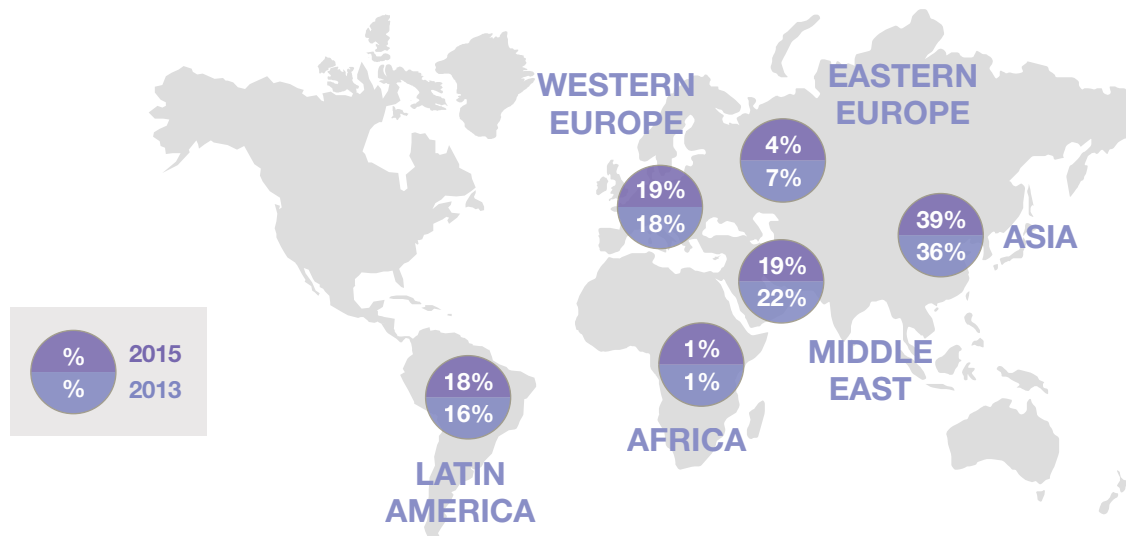
Chart 9: Source region market shares (UK ELT, student weeks, 2014 vs 2016)



Source: English UK, 2016

Note: A comparison of 2014 and 2016 figures does not reflect fluctuation in English UK membership. Percentages do not add up to 100% due to rounding.

Chart 10: Source region market shares (global ELT, student weeks, 2013 vs 2015)



Source: StudentMarketing, 2016

Note: Complete figures for 2016 were unavailable at the time of compilation of this report.

PRIVATE SECTOR MEMBER CENTRES

SOURCE MARKETS

In terms of source market structure, Italy remained the leading source market for the UK ELT industry. It was followed by Saudi Arabia, which experienced the biggest jump in overall student weeks (+20,131), overtaking Spain, a market that continues to struggle. After another year of steady growth, China became the fifth strongest market,

outperforming Turkey and South Korea (both declining). 36 countries led the increase in student weeks, with the fastest-growing markets being Kuwait, Argentina and Saudi Arabia.

Among the 78 markets experiencing a slump, the largest declines were from Italy, Libya and Spain. Other notable

Table 2: Number of student weeks, students and average length of stay (weeks) by source market

Rank by student weeks	Country/region	Student weeks (2015)	Student weeks (2016)	Share of total student weeks (%)	Change in student weeks (%)	Student numbers (2015)	Student numbers (2016)	Share of total students (%)	Change in student numbers (%)	Average length of stay (2016)
1	Italy	256,297	224,139	15.2%	-12.5%	111,610	99,234	24.7%	-11.1%	2.3
2	Saudi Arabia	120,989	141,120	9.6%	16.6%	12,149	14,986	3.7%	23.4%	9.4
3	Spain	133,745	110,730	7.5%	-17.2%	43,006	38,876	9.7%	-9.6%	2.8
4	France	99,361	87,105	5.9%	-12.3%	38,500	35,842	8.9%	-6.9%	2.4
5	China	82,507	85,328	5.8%	3.4%	21,958	24,741	6.2%	12.7%	3.4
6	Turkey	88,375	82,541	5.6%	-6.6%	13,622	13,232	3.3%	-2.9%	6.2
7	Switzerland	79,910	70,886	4.8%	-11.3%	18,168	17,661	4.4%	-2.8%	4.0
8	South Korea	83,975	70,868	4.8%	-15.6%	7,108	6,135	1.5%	-13.7%	11.6
9	Japan	77,561	63,397	4.3%	-18.3%	13,669	11,589	2.9%	-15.2%	5.5
10	Germany	69,519	60,595	4.1%	-12.8%	34,862	31,111	7.7%	-10.8%	1.9
11	Brazil	61,409	40,552	2.8%	-34.0%	12,765	8,463	2.1%	-33.7%	4.8
12	Kuwait	29,229	36,662	2.5%	25.4%	2,787	3,123	0.8%	12.1%	11.7
13	Russia	41,314	32,460	2.2%	-21.4%	12,967	10,712	2.7%	-17.4%	3.0
14	Colombia	45,394	26,234	1.8%	-42.2%	4,078	2,591	0.6%	-36.5%	10.1
15	Taiwan	28,796	23,636	1.6%	-17.9%	4,704	3,637	0.9%	-22.7%	6.5
16	Oman	22,363	21,112	1.4%	-5.6%	2,368	2,339	0.6%	-1.2%	9.0
17	Thailand	26,186	20,685	1.4%	-21.0%	4,153	3,188	0.8%	-23.2%	6.5
18	Mexico	17,085	17,011	1.2%	-0.4%	3,100	4,511	1.1%	45.5%	3.8
19	Argentina	13,032	16,441	1.1%	26.2%	3,837	5,063	1.3%	32.0%	3.2
20	Chile	14,120	13,687	0.9%	-3.1%	2,297	2,360	0.6%	2.7%	5.8
21	Poland	14,037	12,631	0.9%	-10.0%	5,810	5,080	1.3%	-12.6%	2.5
22	Austria	13,019	10,597	0.7%	-18.6%	8,977	6,876	1.7%	-23.4%	1.5
23	Belgium	11,210	9,980	0.7%	-11.0%	4,107	3,337	0.8%	-18.7%	3.0
24	Czech Republic	23,762	9,341	0.6%	-60.7%	17,851	4,086	1.0%	-77.1%	2.3
25	United Arab Emirates	9,788	9,321	0.6%	-4.8%	1,168	1,008	0.3%	-13.7%	9.2
26	Qatar	13,144	8,906	0.6%	-32.2%	1,177	841	0.2%	-28.5%	10.6

decreases were Brazil, Colombia, Thailand and the Czech Republic (due to the withdrawal of a government scholarship).

Furthermore, all traditionally strong Western European markets such as Germany, France and Switzerland, also

faced declines, underlining the need for a stronger presence in long-haul markets exhibiting growth (e.g. China).

The top 20 source markets accounted for 85% of all student weeks as well as student numbers (a slight increase from 84% in 2015).

Rank by student weeks	Country/region	Student weeks (2015)	Student weeks (2016)	Share of total student weeks (%)	Change in student weeks (%)	Student numbers (2015)	Student numbers (2016)	Share of total students (%)	Change in student numbers (%)	Average length of stay (2016)
27	Portugal	10,345	8,736	0.6%	-15.6%	3,207	2,635	0.7%	-17.8%	3.3
28	Netherlands	9,919	8,660	0.6%	-12.7%	3,460	3,244	0.8%	-6.2%	2.7
29	Ukraine	8,706	7,760	0.5%	-10.9%	2,472	2,602	0.6%	5.3%	3.0
30	Kazakhstan	12,802	7,178	0.5%	-43.9%	3,055	1,567	0.4%	-48.7%	4.6
31	Sweden	9,709	6,845	0.5%	-29.5%	2,092	1,668	0.4%	-20.3%	4.1
32	Hong Kong	6,661	6,111	0.4%	-8.3%	1,770	1,439	0.4%	-18.7%	4.2
33	Venezuela	6,907	5,317	0.4%	-23.0%	665	495	0.1%	-25.6%	10.7
34	Algeria	6,130	4,901	0.3%	-20.0%	650	650	0.2%	0.0%	7.5
35	United Kingdom	5,308	4,786	0.3%	-9.8%	1,108	1,153	0.3%	4.1%	4.2
37	Bulgaria	5,196	4,634	0.3%	-10.8%	1,127	1,038	0.3%	-7.9%	4.5
36	Israel	3,778	4,503	0.3%	19.2%	1,397	1,762	0.4%	26.1%	2.6
38	Morocco	4,535	3,911	0.3%	-13.8%	958	924	0.2%	-3.5%	4.2
39	Hungary	4,453	3,909	0.3%	-12.2%	1,505	1,213	0.3%	-19.4%	3.2
40	Peru	4,105	3,827	0.3%	-6.8%	821	635	0.2%	-22.7%	6.0
41	Iran	3,238	3,539	0.2%	9.3%	348	531	0.1%	52.6%	6.7
42	Other Africa	3,775	3,447	0.2%	-8.7%	585	621	0.2%	6.2%	5.6
43	Ecuador	3,501	3,416	0.2%	-2.4%	432	368	0.1%	-14.8%	9.3
44	Libya	32,942	3,276	0.2%	-90.1%	2,984	287	0.1%	-90.4%	11.4
45	Jordan	2,700	3,160	0.2%	17.0%	387	375	0.1%	-3.1%	8.4
46	Angola	11,171	3,119	0.2%	-72.1%	604	251	0.1%	-58.4%	12.4
47	Romania	3,284	3,117	0.2%	-5.1%	1,097	1,112	0.3%	1.4%	2.8
48	Denmark	3,595	3,104	0.2%	-13.7%	1,450	1,273	0.3%	-12.2%	2.4
49	Slovakia	3,330	2,921	0.2%	-12.3%	1,187	1,212	0.3%	2.1%	2.4
50	Greece	3,071	2,540	0.2%	-17.3%	1,100	947	0.2%	-13.9%	2.7
51	Panama	1,891	2,268	0.2%	19.9%	215	217	0.1%	0.9%	10.5
52	Uruguay	1,205	1,889	0.1%	56.8%	294	501	0.1%	70.4%	3.8

PRIVATE SECTOR MEMBER CENTRES

SOURCE MARKETS

Rank by student weeks	Country/region	Student weeks (2015)	Student weeks (2016)	Share of total student weeks (%)	Change in student weeks (%)	Student numbers (2015)	Student numbers (2016)	Share of total students (%)	Change in student numbers (%)	Average length of stay (2016)
53	Other Western Europe	1,553	1,808	0.1%	16.4%	698	601	0.1%	-13.9%	3.0
54	Vietnam	3,335	1,759	0.1%	-47.3%	394	355	0.1%	-9.9%	5.0
55	Other Central America	829	1,698	0.1%	104.8%	115	274	0.1%	138.3%	6.2
56	Tunisia	1,679	1,643	0.1%	-2.1%	481	551	0.1%	14.6%	3.0
57	Azerbaijan	2,758	1,583	0.1%	-42.6%	761	483	0.1%	-36.5%	3.3
58	Mongolia	1,272	1,574	0.1%	23.7%	90	117	< 0.1%	30.0%	13.5
59	Norway	1,892	1,540	0.1%	-18.6%	795	654	0.2%	-17.7%	2.4
60	Bahrain	1,322	1,504	0.1%	13.8%	151	261	0.1%	72.8%	5.8
61	Egypt	1,482	1,493	0.1%	0.7%	323	257	0.1%	-20.4%	5.8
62	Belarus	1,542	1,423	0.1%	-7.7%	433	464	0.1%	7.2%	3.1
63	Other Asia/Far East	1,760	1,421	0.1%	-19.3%	393	245	0.1%	-37.7%	5.8
64	Latvia	1,286	1,359	0.1%	5.7%	422	394	0.1%	-6.6%	3.4
65	Cyprus	1,647	1,333	0.1%	-19.1%	197	169	< 0.1%	-14.2%	7.9
66	Serbia	1,569	1,324	0.1%	-15.6%	574	522	0.1%	-9.1%	2.5
67	Albania	1,532	1,298	0.1%	-15.3%	197	185	< 0.1%	-6.1%	7.0
68	Indonesia	1,215	1,251	0.1%	3.0%	274	259	0.1%	-5.5%	4.8
69	Croatia	1,570	1,235	0.1%	-21.3%	640	475	0.1%	-25.8%	2.6
70	Iraq	2,447	1,216	0.1%	-50.3%	253	147	< 0.1%	-41.9%	8.3
71	Uzbekistan	1,332	1,150	0.1%	-13.7%	301	279	0.1%	-7.3%	4.1
72	Lithuania	1,165	1,148	0.1%	-1.5%	362	386	0.1%	6.6%	3.0
73	Macao	500	1,090	0.1%	118.0%	111	177	< 0.1%	59.5%	6.2
74	Georgia	1,597	1,058	0.1%	-33.8%	453	321	0.1%	-29.1%	3.3
75	Finland	1,079	997	0.1%	-7.6%	536	520	0.1%	-3.0%	1.9
76	Syria	495	972	0.1%	96.4%	71	136	< 0.1%	91.5%	7.1
77	India	820	940	0.1%	14.6%	247	259	0.1%	4.9%	3.6
78	USA	769	927	0.1%	20.5%	213	239	0.1%	12.2%	3.9
79	Costa Rica	730	829	0.1%	13.6%	143	175	< 0.1%	22.4%	4.7
80	Other Eastern/ Central Europe	612	829	0.1%	35.5%	153	136	< 0.1%	-11.1%	6.1
81	Canada	986	817	0.1%	-17.1%	237	254	0.1%	7.2%	3.2
82	Slovenia	1,178	719	< 0.1%	-39.0%	571	341	0.1%	-40.3%	2.1
83	Tajikistan	487	716	< 0.1%	47.0%	151	222	0.1%	47.0%	3.2
84	Bolivia	525	708	< 0.1%	34.9%	60	104	< 0.1%	73.3%	6.8

Rank by student weeks	Country/region	Student weeks (2015)	Student weeks (2016)	Share of total student weeks (%)	Change in student weeks (%)	Student numbers (2015)	Student numbers (2016)	Share of total students (%)	Change in student numbers (%)	Average length of stay (2016)
85	Other South America	638	708	< 0.1%	11.0%	100	109	< 0.1%	9.0%	6.5
86	Other Middle East	1,014	666	< 0.1%	-34.3%	164	127	< 0.1%	-22.6%	5.2
87	Nigeria	1,177	644	< 0.1%	-45.3%	227	109	< 0.1%	-52.0%	5.9
88	Paraguay	643	608	< 0.1%	-5.4%	92	86	< 0.1%	-6.5%	7.1
89	Estonia	735	569	< 0.1%	-22.6%	422	288	0.1%	-31.8%	2.0
90	Armenia	822	537	< 0.1%	-34.7%	247	149	< 0.1%	-39.7%	3.6
91	Pakistan	362	472	< 0.1%	30.4%	70	93	< 0.1%	32.9%	5.1
92	Malaysia	869	461	< 0.1%	-47.0%	192	77	< 0.1%	-59.9%	6.0
93	Palestine	676	442	< 0.1%	-34.6%	59	45	< 0.1%	-23.7%	9.8
94	Luxembourg	480	411	< 0.1%	-14.4%	202	177	< 0.1%	-12.4%	2.3
95	Iceland	311	368	< 0.1%	18.3%	135	132	< 0.1%	-2.2%	2.8
96	Turkmenistan	435	341	< 0.1%	-21.6%	72	51	< 0.1%	-29.2%	6.7
97	Kyrgyzstan	412	333	< 0.1%	-19.2%	67	56	< 0.1%	-16.4%	5.9
98	Philippines	569	319	< 0.1%	-43.9%	66	53	< 0.1%	-19.7%	6.0
99	Yemen	793	318	< 0.1%	-59.9%	84	31	< 0.1%	-63.1%	10.3
100	Montenegro	190	303	< 0.1%	59.5%	59	56	< 0.1%	-5.1%	5.4
101	Lebanon	454	295	< 0.1%	-35.0%	169	103	< 0.1%	-39.1%	2.9
102	Bosnia and Herzegovina	223	285	< 0.1%	27.8%	73	69	< 0.1%	-5.5%	4.1
103	Moldova	213	255	< 0.1%	19.7%	59	48	< 0.1%	-18.6%	5.3
104	Liechtenstein	507	253	< 0.1%	-50.1%	226	65	< 0.1%	-71.2%	3.9
105	Ireland	946	249	< 0.1%	-73.7%	287	95	< 0.1%	-66.9%	2.6
106	Monaco	252	215	< 0.1%	-14.7%	61	47	< 0.1%	-23.0%	4.6
107	Cambodia	71	194	< 0.1%	173.2%	23	39	< 0.1%	69.6%	5.0
108	Australia	103	189	< 0.1%	83.5%	19	42	< 0.1%	121.1%	4.5
109	Singapore	108	179	< 0.1%	65.7%	18	59	< 0.1%	227.8%	3.0
110	Nepal	88	105	< 0.1%	19.3%	35	23	< 0.1%	-34.3%	4.6
111	Macedonia	131	100	< 0.1%	-23.7%	37	31	< 0.1%	-16.2%	3.2
112	Other North America	114	97	< 0.1%	-14.9%	26	15	< 0.1%	-42.3%	6.5
113	New Zealand	34	60	< 0.1%	76.5%	7	11	< 0.1%	57.1%	5.5
114	Other Australasia	31	35	< 0.1%	12.9%	6	6	< 0.1%	0.0%	5.8

Source: English UK, 2016

PRIVATE SECTOR MEMBER CENTRES

SOURCE MARKETS

Chart 11: Performance of selected source markets (student weeks, 2006-2016)

ITALY



TURKEY



SPAIN



JAPAN



SAUDI ARABIA



CHINA/ HONG KONG



FRANCE



SWITZERLAND



SOUTH KOREA



BRAZIL



RUSSIA



GERMANY



COLOMBIA



AUSTRIA



THAILAND



POLAND



VENEZUELA



ARGENTINA



TAIWAN



CZECH REPUBLIC



MEXICO



SWEDEN



Source: English UK, 2006-2016

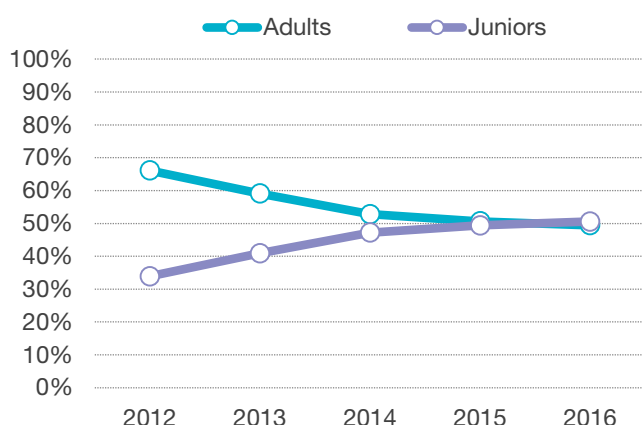
Note: Data is not directly comparable as English UK membership fluctuates year-on-year.

PRIVATE SECTOR MEMBER CENTRES

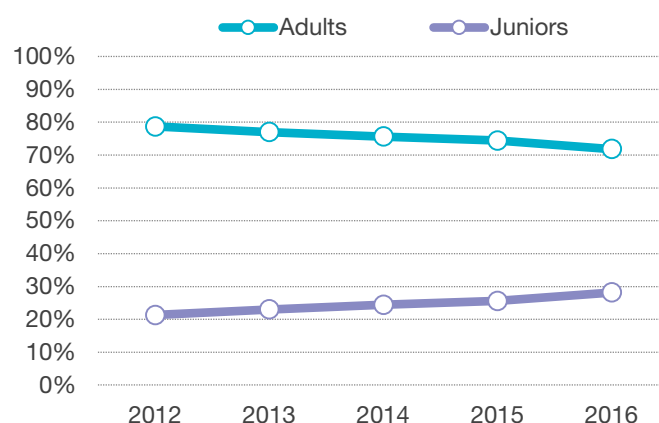
ADULT VS JUNIOR SEGMENT

Chart 12: Share of adults and juniors out of the total number of students and student weeks in the UK (%)

STUDENT NUMBERS



STUDENT WEEKS

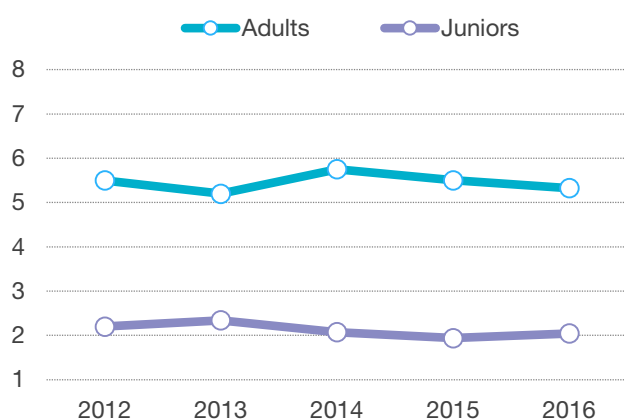


Source: English UK, 2012-2016

In 2016, the junior-to-adult ratio tilted towards junior students, who now represent the larger ELT student segment (51%). In total, 203,101 juniors attended classes in private sector member centres, which was 22,050 less than in 2015 (down by 10%).

Number of adult students decreased by 14% – to 198,600 in 2016. This development, where adult student figures declined more rapidly than juniors, has resulted in the proportional growth of junior student weeks.

Chart 13: Average length of stay (weeks)



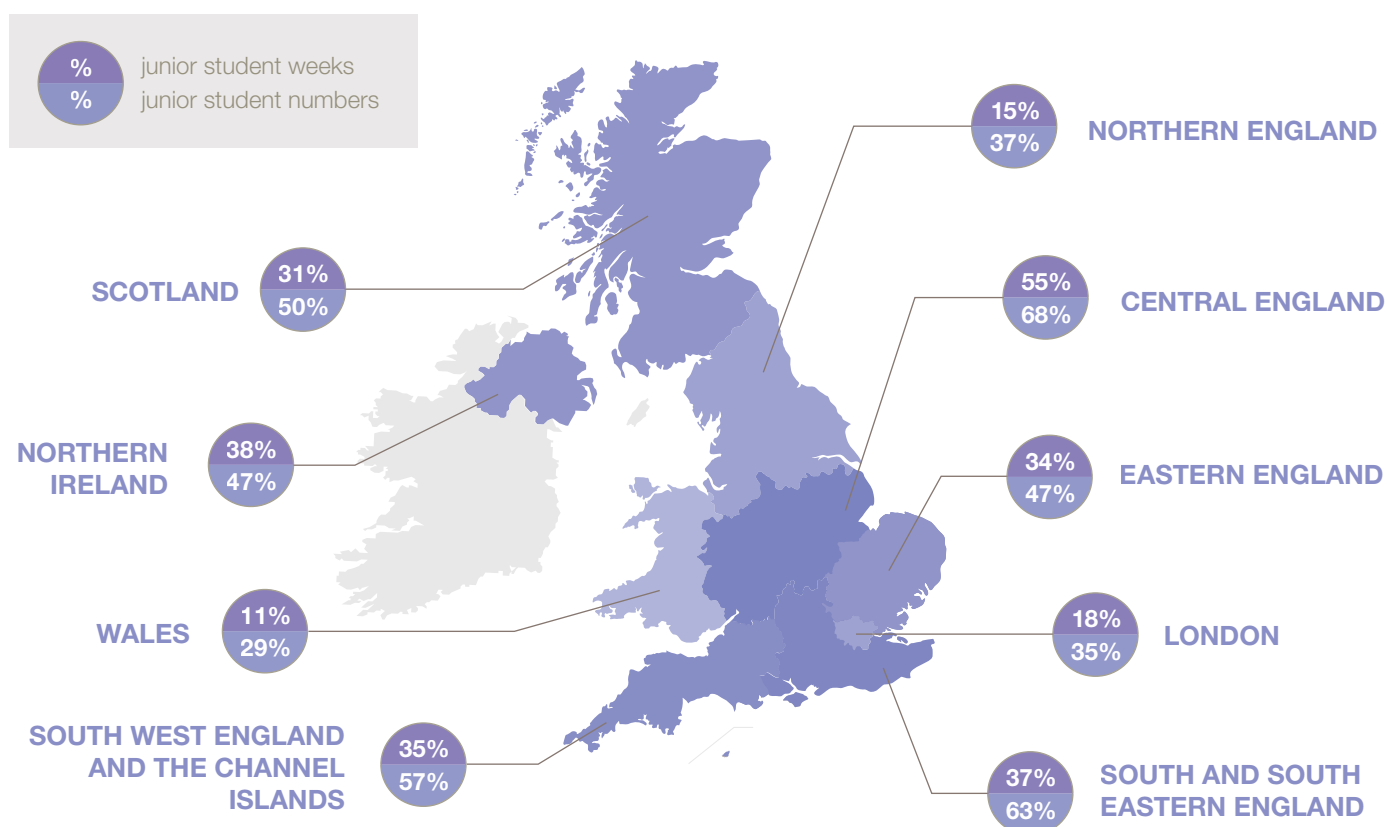
Source: English UK, 2012-2016

While absolute junior student weeks and junior student numbers exhibited a decrease, more schools began enrolling juniors. In 2016, junior students were taught at 276 private sector member centres (i.e. 18 more members than in 2015).

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. In the mid-term, the length of stay of adults as well as juniors has experienced no major fluctuations.

Note: Length of stay data is not compatible with previous reporting due to different methodology applied.

Chart 14: Share of junior student numbers and junior student weeks by region



Source: English UK, 2016

Of all regions, the highest share of junior English learners and their study weeks was recorded in Central England (68% of all students were juniors). Other regions, where junior students accounted for more than half of the students, were South and South Eastern England and South West England and The Channel Islands. Regions,

in which adults were the majority were Wales, Northern England and London.

Note: In the case of seasonal multi-centres or year-round providers with a separate seasonal provision, data was attributed according to the location of the headquarters.

CONCLUSIONS

The UK has experienced a third consecutive year of decline, reflecting the effects of early 2016's strong sterling, increasing competition and a maturing market for learning English abroad as well as uncertainty at home and around the world.

Key source markets in Western Europe, including Italy and Spain, continued to wane. Despite another year of double-digit decline, Italy remained the strongest market for UK ELT with over 224,000 student weeks and 99,000 individual students. It will be interesting to see the effect of renewed PON funding in 2017 on the flagging Italian market.

Notably, 2016 is the first year in which (marginally) more junior students studied English in the UK than adults. An increasing number of our member centres are responding to this demand by offering courses for young learners.

China entered the top five after another year of steady growth, outperforming Turkey and South Korea, and Saudi Arabia leapfrogged Spain into second position after a small decrease in 2015. Its regional neighbour Kuwait also experienced robust growth thanks to government-sponsored long-stay students.

In Latin America, Argentina was the star with 25% growth in student weeks. Mexico held steady whilst Brazil and Colombia continued to fall: domestic politics and economics, along with the perception of unsympathetic UK visa policies, continue to affect demand.

UK international education is admired globally and our ELT industry is world leading. However, our sector is facing an increasingly challenging operating environment. Our industry needs innovative, intelligence-led and ambitious international promotion efforts to not only rise to these challenges but to thrive.

Our activities include:

- Initiatives for young learners in China, including a direct marketing campaign; agency workshops in Beijing and Hong Kong; and a summer inward mission for agents.
- Targeting the junior market with a new event in Italy and the launch of a digital marketing boot camp to help members reach the tech-savvy Generation Z.
- English UK fairs in the United Arab Emirates, Argentina and Hong Kong focussing on the regions identified as having the largest growth opportunities.
- Market reports on the Gulf States, Brazil and Thailand, providing members with context and analysis. Our Brazil report shows that, despite decreasing figures, it will return as a strong market in the future.
- Our new quarterly statistics scheme, QUIC: a hugely important development allowing members to benchmark performance and review marketing plans continuously.
- Relocating StudyWorld to the QEII Centre and focusing the event on the UK's international education sector. Reflecting changes in how the international education industry does business, StudyWorld will host study abroad agencies, overseas governments, corporations, institutions and other buyers seeking partnerships with UK education exporters.

English UK has an ambitious new three-year strategy for 2018 to 2020, and we will continue to respond innovatively to the challenges facing UK ELT. By leveraging robust market intelligence and working together with governmental organisations and commercial partners, we are confident we will lead our industry to success.

Annie Wright
Marketing Director
English UK

