

GLOBAL ELT OVERVIEW

THE UK IN THE GLOBAL CONTEXT

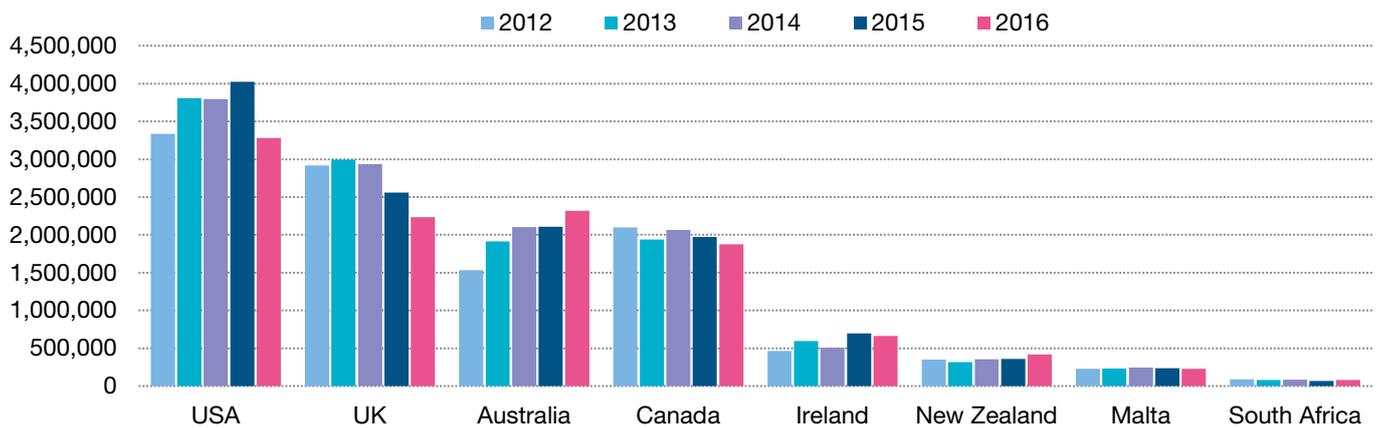
Approximately 1.38 million students travelled abroad to learn English in one of the eight major ELT destinations (the UK, the USA, Australia, Canada, Ireland, Malta, New Zealand and South Africa) in 2016. Although the UK and the USA were the only destinations facing a decrease in student numbers between 2015 and 2016, the declines were big enough to bring the overall figure down.

English language learners spent a corresponding 11.1 million student weeks in these destinations. The figure translates into a 7.6% y-o-y decrease and marks the second

consecutive year of decline globally. However, country-to-country comparisons show uneven development across the industry.

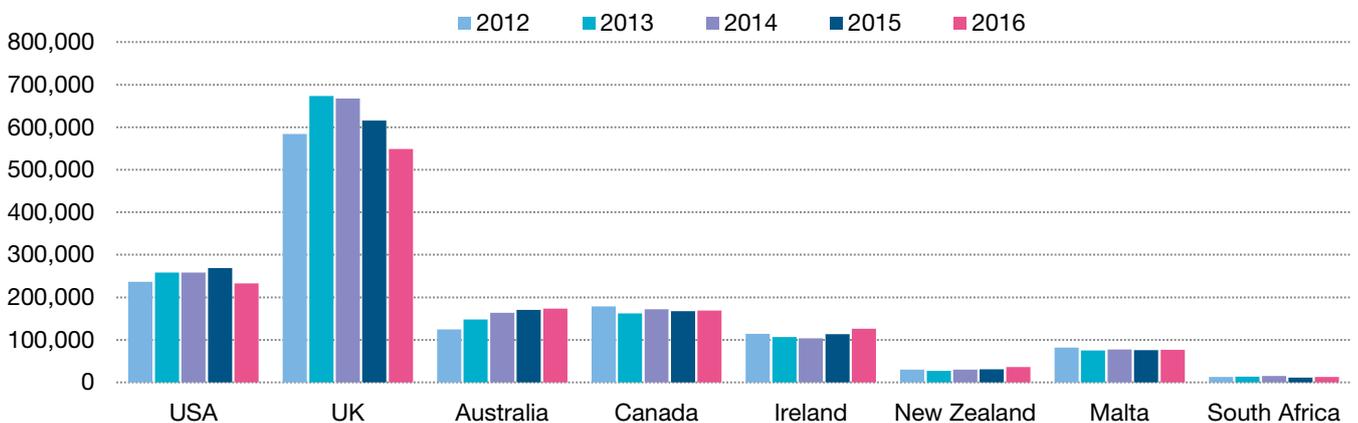
Australia, New Zealand and South Africa all grew in terms of both student numbers and student weeks. Ireland, Canada and Malta, while registering an increase in student numbers, faced a drop in student weeks due to students' shorter stays. The UK and the USA decreased in both student numbers and student weeks. Nonetheless, the UK remains the destination hosting the most English language learners.

Chart 1: Overview of ELT destinations (student weeks)



Source: StudentMarketing, 2017; Figures represent extrapolations based on multiple sources. They cover all centres in the destinations and represent the best possible calculation, rather than a headcount.

Chart 2: Overview of ELT destinations (student numbers)



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