STUDENT STATISTICS REPORT 2014

EXECUTIVE SUMMARY

STUDENT STATISTICS REPORT 2014 – EXECUTIVE SUMMARY

Prepared on behalf of:

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INTRODUCTION

English UK is pleased to present the executive summary of our latest student statistics report.

With a vision to better service our members and improve our provision of sophisticated market intelligence, English UK has begun a process of refining its annual data collection and reporting activities.

We understand the importance of robust data, helping members and the association to make well-informed business decisions. For 2014, we made important changes to the submission of annual student week statistics for our private sector members, who now report data on over 100 geographic markets.

In order to improve analysis of this data, we are working with StudentMarketing as our insight partner to produce a report that not only allows a deeper source market evaluation for the UK's English language teaching sector, but also sets this in the broader global market context.

Our improved student statistics report is only the first step. In the coming years, the availability of historic trends for a comprehensive list of source markets will help us to gain a better understanding of development in a wide array of countries and will provide grounds for individual members to benchmark their performance.

As the global ELT industry matures, competition between host countries inevitably comes into sharper focus and the UK sector, which leads the ELT world in so many ways, should be at the forefront. The trends and insights identified in the report are important; a reality check for everyone involved in UK ELT.

METHODOLOGY

The data in the student statistics report primarily comes from English UK annual member declarations returned between 2004 and 2014. In addition to this, StudentMarketing supplied its own data to indicate the UK's position in the global market, as well as to provide global insights into source markets.

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

- When compared to other major ELT destinations, the UK maintains its leading position in attracting ELT students. However, when it comes to student weeks, the USA takes the lead predominantly thanks to its strong pathway segment.
- The UK also faces increased competition from destinations such as Canada and Australia, which are gaining market share in Asian and Latin American countries.
- Approximately 580,618 individual students studied at 479 English UK state and private sector member centres in 2014, for an estimated 2,348,116 student weeks. This translates into a decrease of 4,886 students in comparison to 2013.
- Overall, the association membership grew by 3 members in 2014.
- While private sector centres reported an average of 6.2 visa refusals per centre, the average number of visa refusals registered by the state sector membership was 7.5.

Private sector member centres

- 399 private member centres accounted for 498,072 students who spent 2,000,151 weeks on ELT courses - a minor increase of 0.2% in comparison to the previous year.
- The number of junior students studying English in the UK has increased to 47% from 25% ten years ago.
- The average number of adults was 835 per centre. The number of junior students per centre in 2014 averaged 891.
- 2014 showed positive development in terms of programme duration, as the average length of stay was up for both age groups: 3.3 weeks for juniors and 5.7 weeks for adults. For the adult segment, this marked the first increase following 5 consecutive years of decline.
- The region with the highest average length of stay was the Middle East (8.6 weeks).
- According to private sector member centres, the top 5 source markets were Italy, Spain, Saudi Arabia, France and South Korea.
- The top 20 source markets accounted for 84% of all student weeks spent at private sector member centres.

State sector member centres

- The 80 public sector centres in the membership in 2014 taught an overall 347,965 student weeks.
- This represented a 14.95% decrease from 399,383 student weeks in 2013, which was impacted by the number of member centres declining by 4.
- 59% of all students at these institutions were Tier 4 students.

Conclusions

- The major trend of travelling abroad at a younger age is bringing new opportunities within the entire youth and student travel industry, and the UK seems to be benefitting.
- Western Europe remains our most important source region. However, as European countries have ceased to drive growth since 2011, other source markets in the Middle East now exhibit the highest levels of potential.
- Markets showing stable development over the past 4 years include Italy, France, Germany, Venezuela and Mexico. Russia was also performing well until the impact of the downfall of the Rouble in the second half of 2014.
- The UK is currently under-represented in markets such as China and Vietnam, which are rising globally. We are also losing market share in Brazil, Colombia, Spain and Thailand.

INFOGRAPHICS

ENGLISH UK MEMBERSHIP IN FIGURES

OVERALL DATA

479
MEMBER CENTRES

+3
VS 2013

580,618
STUDENTS

-0.9%
VS 2013

2,348,116
STUDENT WEEKS

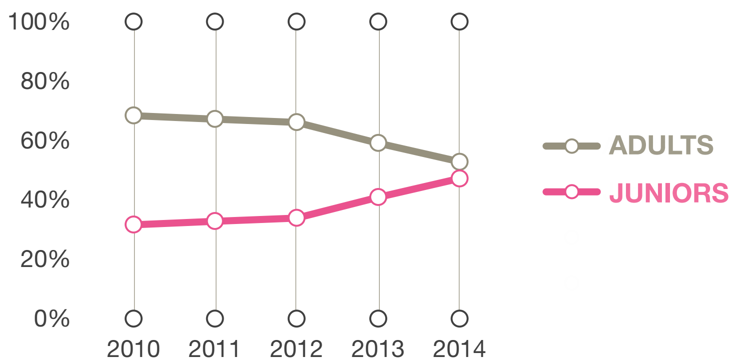
-2%
VS 2013

ADULT VS JUNIOR RATIO

BREAKDOWN & HISTORIC TREND*

47% OF ALL **STUDENTS** WERE JUNIORS

24% PROPORTION OF **STUDENTS WEEKS** SPENT BY JUNIORS



LENGTH OF STAY

AVERAGE NUMBER OF WEEKS*

ADULTS

2013: **5.3**

2014: **5.7**

JUNIORS

2013: **2.8**

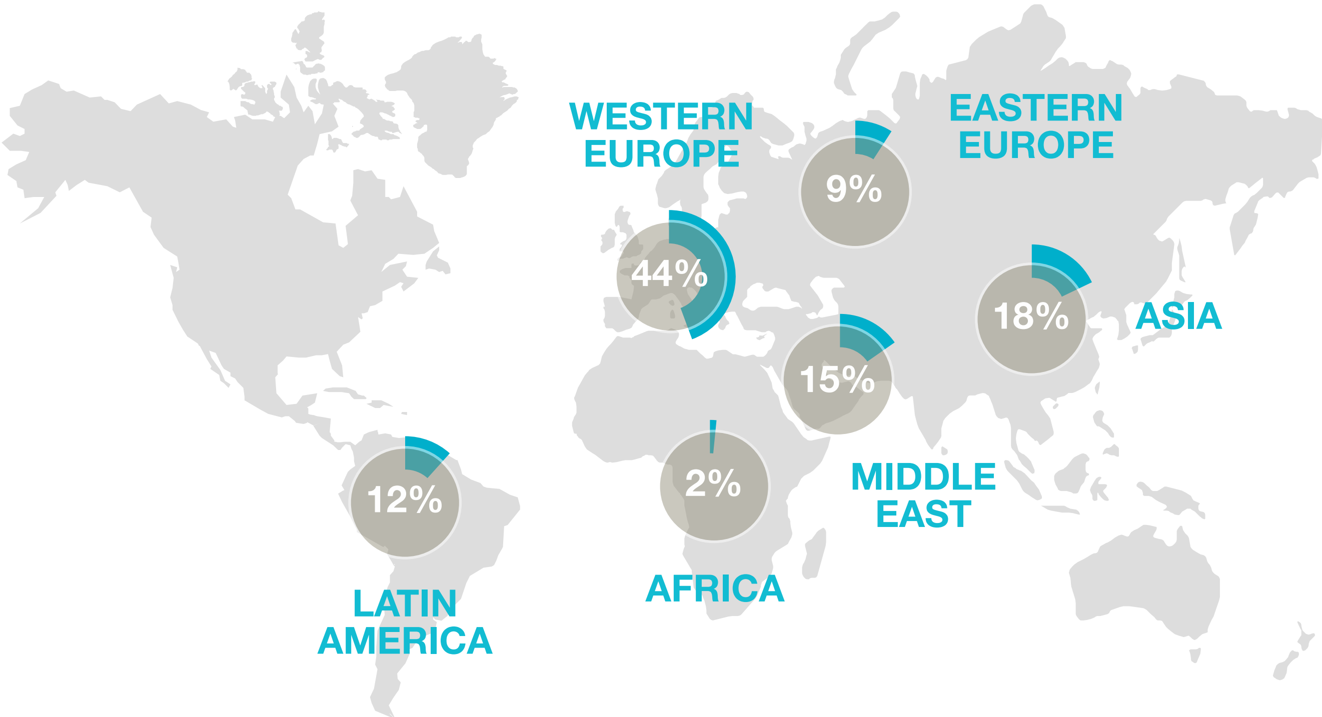
2014: **3.3**

* DATA REFERS TO PRIVATE SECTOR MEMBER CENTRES ONLY.

INFOGRAPHICS

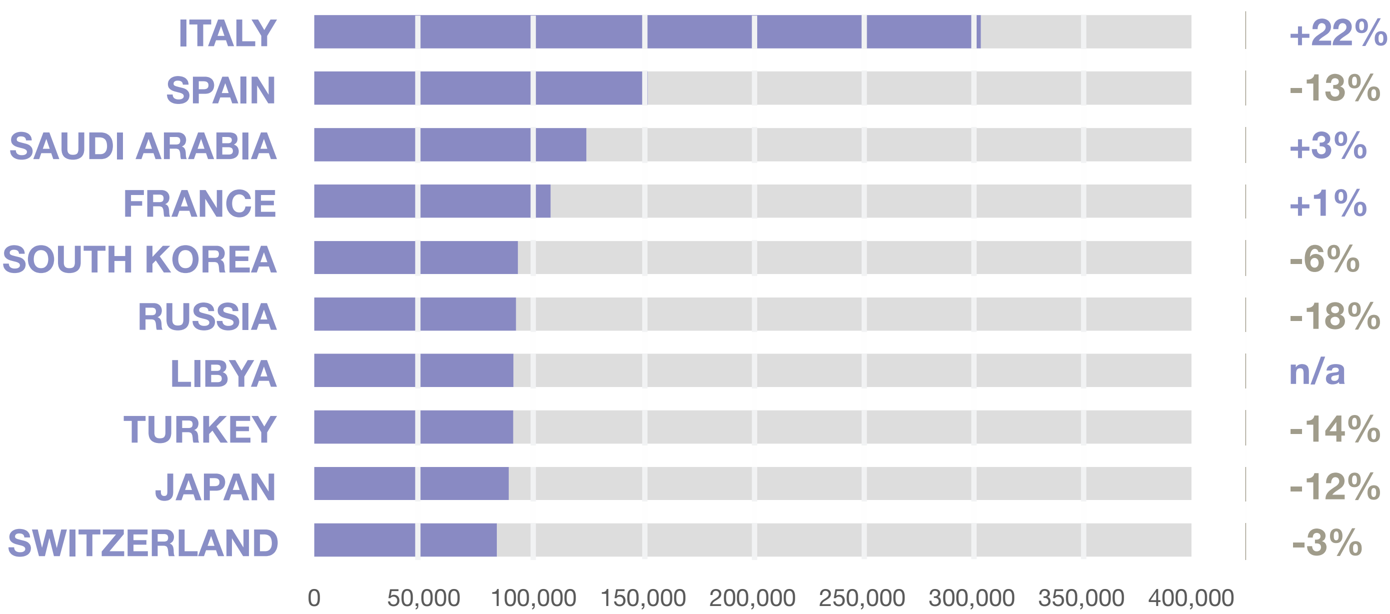
SOURCE REGIONS

PERCENTAGE OF TOTAL STUDENT WEEKS*



TOP SOURCE MARKETS

STUDENT WEEKS & Y-O-Y CHANGE*



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