ENGLISH UK

student statistics report

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englishuk.com

STUDENT STATISTICS REPORT 2017

Prepared on behalf of:

ENGLISHUK

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FOREWORD

It is a pleasure to present our student statistics report this year. There are two reasons for this.

The first is that English UK members have enjoyed their best trading year since 2015, emerging from three years of decline and significantly widening their active source markets. Student weeks increased by five per cent overall, despite a loss of 13 member centres, with notable growth in London and Scotland.

And the second is that this report – our fourth with our insight partner StudentMarketing – is the most comprehensive to date, providing previously unavailable information about university and further education (FE) college activities.

For the first time our understanding of differences between state and private member centres is underpinned by data. While we knew China was equally as important to FE colleges and universities as the private sector (where it has consistently been a top five sending market) we now know it dominates the public sector. Not only is it the top source for universities and FE colleges, but it accounts for 42 per cent of its student weeks, five times more than second-placed Saudi Arabia.

Adults study for around a third longer in the state sector, with an average stay of 9.5 weeks, compared to 5.3 in a private centre. Just 10 per cent of state sector ELT students are juniors, compared to 55 per cent of private sector students.

Detailed data from state sector members also gives us more robust overall student numbers than in the past, when they were extrapolated from student week data. As a result, these figures are not comparable with those previously published, although a re-analysis of 2013-2016 student numbers for this report allows for historical comparison.

While headlines suggest that juniors and EU students are crucial to the fortunes of our industry, the closer analysis done this year suggests the truth is slightly more nuanced. While juniors make up 53 per cent of student numbers, their shorter length of stay means they are responsible for just 27 per cent of student weeks. Similarly, EU students make up 58 per cent of student numbers but just 37 per cent of student weeks.

All these fascinating new insights have emerged from our commitment to continually improve our market intelligence so that we can support members to make the best-possible decisions and so lead the UK ELT industry to success. This work continues: we are about to embark on a pilot scheme investigating the depth and breadth of data which members are willing to share with us, and what additional intelligence would be useful for your planning and marketing.

Finally, we are grateful to every English UK member who has helped us by supplying their data for this report. We hope you find it as useful as we do.

Sarah Cooper
Chief Executive
English UK

The positive signs of revival in the UK ELT sector observed towards the end of 2016 as well as incoming data from the Quarterly Intelligence Cohort (QUIC) have now been reconfirmed – after three years of consecutive decline, the UK ELT sector bounced back in 2017.

Annual declarations from English UK member centres also point to a diversity in growth. While in 2016 increases came from 41 source countries, the positive development in 2017 was driven by 63 growth markets. Most notably, strong results were recorded in markets such as Italy, Turkey and Russia. Demand from China continued to mount and English UK member centres also benefited from coordinated marketing efforts in Brazil.

On another front, 2017 reinforced the UK as the most popular destination in the world for junior English language students. The 27% y-o-y growth in junior student numbers seen in the private sector is a testament to the UK's attractiveness for this age band.

For the first time, state sector members submitted detailed statistics on their ELT student population. In consequence, it has been possible to supply pertinent market intelligence on source markets and average length of stay as well as junior and adult ratio. Using an improved methodology and leveraging member feedback on data availability, we are hopeful that we will be able to expand upon this basis and add historical comparisons in the coming years.

As always, our work does not end here – pursuing the ever-present goal of making annual reporting even more robust, we are testing new data collection models in order to amplify future regional analyses and benchmarking.

We hope this latest report will prove a valuable tool for English UK member centres.

Samuel Vetrak
Chief Executive Officer
StudentMarketing

METHODOLOGY

The core data used in this report was collated from English UK annual member declarations returned between 2007 and 2017.

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.
- In this year's edition English UK state sector members provided more detailed information about their student population. The sample per breakdown (by student age and country of origin) varies and is always noted below each respective chart or table.
- Of the overall English UK membership, six centres did not report their data, and were therefore excluded from the 2017 reporting.

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

EXECUTIVE SUMMARY

General overview

- After three years of consecutive downturn, 2017 saw a strong rebound by the UK ELT industry, especially for the private sector. English UK member centres welcomed 497,028 English language students (an increase of 14%), who stayed for a total of 1,884,168 weeks (an increase of 5%).
- This growth came despite the number of member centres declining by 13 centres.
- Students under the age of 18 outnumbered adults and represented 53% of all enrolments in the UK ELT sector.
- Regarding regional results, the highest increase in student weeks was recorded in London (+48,761 weeks). London and Scotland were the biggest gainers percentage-wise, both enjoying a 11% y-o-y growth.
- Markets outside the European Union (EU) generated 63% of all student weeks, while contributing 42% of students.

State sector member centres

- Sixty-seven state sector members accounted for a total of 31,486 students and 277,888 student weeks. Both indicators dropped by 12% on 2016.
- Of students attending further education (FE) and higher education (HE) centres, 10% were juniors, representing 4% of the total student weeks for the sector.
- Course length averaged out at 8.8 weeks, with adult students staying an average of 9.5 weeks.
- The top five source countries for state sector members were China (42% of student weeks), Saudi Arabia (8%), Japan (8%), Poland (6%) and South Korea (4%).

Private sector member centres

- There were 361 private sector member centres reporting in 2017.
- In comparison to 2016, private members taught 465,542 English language students (16% y-o-y growth). The number of student weeks generated grew by 9% to reach 1,606,280.
- There were 278 centres enrolling junior students in 2017, which was an increase of two centres on the previous year.
- Private sector centres catering to juniors enrolled an average of 927 students. The average number of adults per member centre stood at 728.
- With a share of 55%, junior students were reconfirmed as the prevailing age band of the ELT student population at private sector centres.
- Similarly to the previous year, the average length of stay of an adult student in 2017 amounted to 5.3 weeks. The junior group stayed for 1.9 weeks (a slight decrease from 2 weeks in 2016).
- The top five sending markets in 2017 were Italy (16.5% of total student weeks), Saudi Arabia (8.4%), Spain (7.1%), China (6.1%) and Turkey (6.1%).
- The biggest growth came from Italy (+41,223 student weeks), Brazil (+21,646) and Turkey (+14,722), while Saudi Arabia (-6,819 student weeks), Kuwait (-3,435 student weeks) and the United Arab Emirates (-2,480) registered the steepest declines.

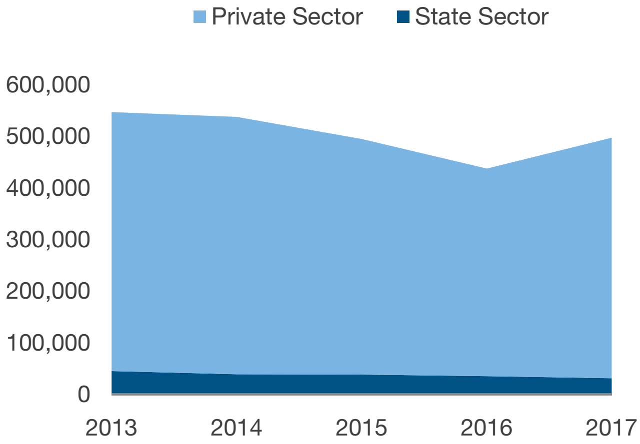
GENERAL OVERVIEW
THE UK AT A GLANCE

In 2017, the English UK member base comprised 434 centres, with 428 reporting their statistics. Cumulatively, these centres accommodated 497,028 students studying English for a total of 1,884,168 weeks.

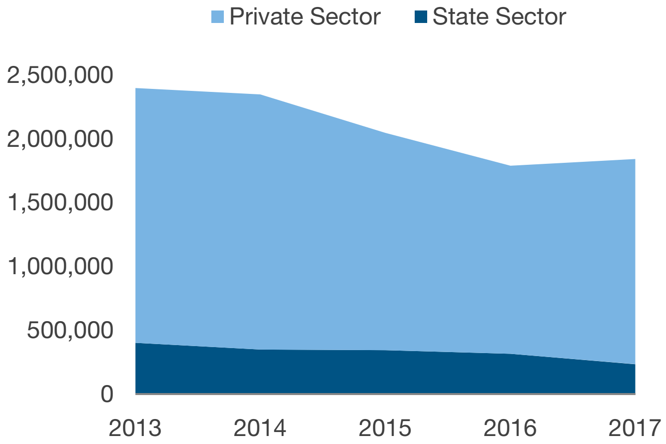
While student weeks increased by 5%, student numbers grew by 14% (compared to 2016), evidencing the first increase after three years of decline.

Chart 1: Overall number of students (2013-2017) and student weeks (2013-2017) taught by English UK member centres

STUDENT NUMBERS



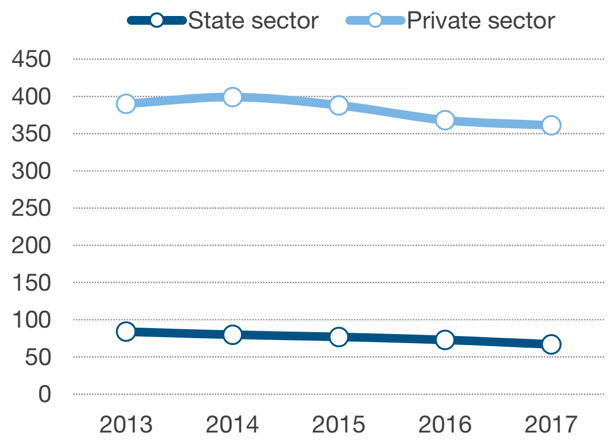
STUDENT WEEKS



Source: English UK, 2013-2017

Furthermore, 2017 is the first year to feature actual student numbers as reported by state sector members. Previously, the state sector student numbers were derived from student weeks which might have led to over-representation of student numbers. This year's state sector data is, therefore, more precise. Subsequently, student numbers in the state sector in previous years were recalculated using the latest primary data.

Chart 2: Number of English UK member centres by sector



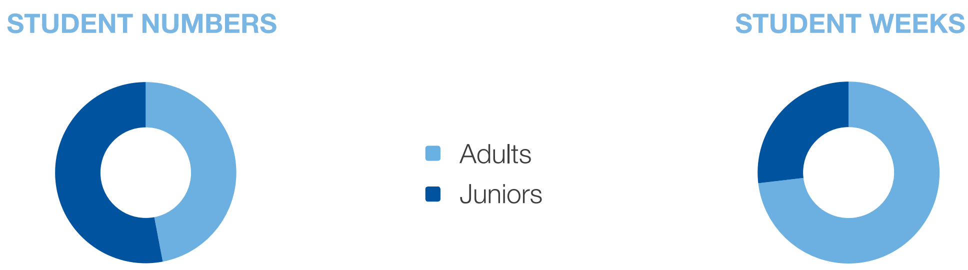
Source: English UK, 2013-2017

It should be noted that this positive development transpired despite a decrease from 2016 to 2017 in the participating English UK member base, which declined by 13 members (six state, seven private).

Y-o-y performance of member centres from both 2016 and 2017 reporting schemes points to an even higher growth in student weeks:

	Student weeks
2016 (n=411)	1,741,200
2017 (n=411)	1,845,834
Change (%)	+6%

Chart 3: Share of adults and juniors out of the total number of students and student weeks taught by English UK member centres



Source: English UK, 2017; n=420 state and private sector member centres

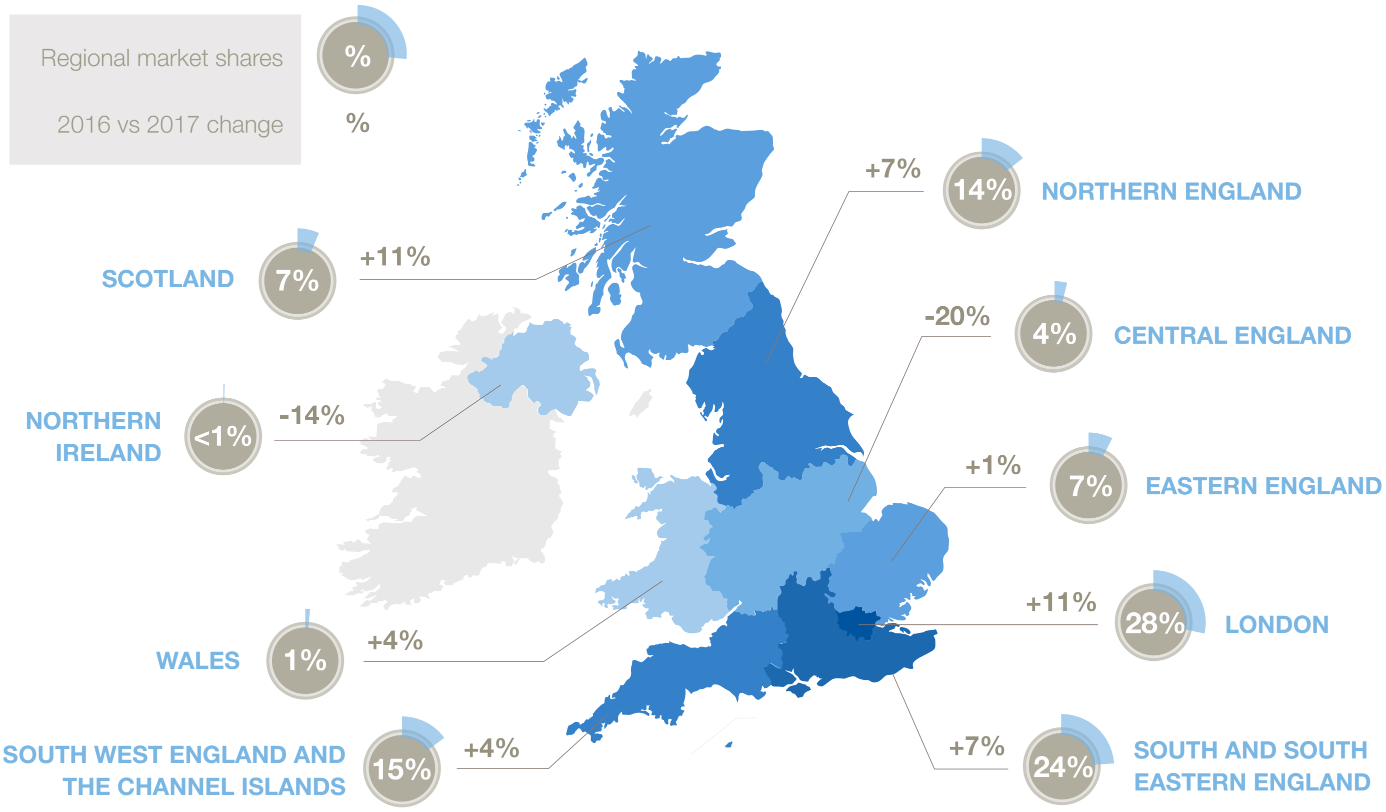
Students under the age of 18 represented 53% of the whole student population in the UK ELT sector. At the same time, they accounted for over one quarter of student weeks (27%).

The report later shows that junior students dominated the private sector membership (55%) whereas state sector centres were predominantly attended by adult students (90%).

GENERAL OVERVIEW

THE UK AT A GLANCE

Chart 4: Regional market share (2017) and 2016 vs 2017 change in student weeks



Source: English UK, 2017
Note: Percentages do not add up to 100% due to rounding.

While the UK ELT sector experienced a good year overall, the distribution of growth across the regions was uneven. A comparison of centres participating in 2017 and 2016 showed a decline in student weeks in Central England and Northern Ireland. Percentage-wise, Scotland and London enjoyed the highest increase (+11%), while London's gain was greatest (+48,761) in terms of absolute figures. The next fastest growing regions were South and South Eastern England (+30,677 weeks) and Northern England (+16,195 weeks).

Multi-centres, specifically, noticed a 15% y-o-y growth (+28,592 weeks).

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. The results per region might, therefore, be distorted. The current methodology represents the most suitable option for multi-centre classification. At the same time, a new method is being tested as part of another English UK statistics scheme (QUIC). The planned improvements should contribute to a more accurate reporting across all data collection platforms in the future.

Table 1: Student weeks, students and average length of stay (weeks) by source market (rank by student weeks)

Rank	Country	Student weeks (2017)	Share (%)	Student numbers (2017)	Share (%)	Average length of stay (2017)
1	Italy	270,131	14.9%	129,893	26.4%	2.1
2	China	185,135	10.2%	44,673	9.1%	4.1
3	Saudi Arabia	151,041	8.3%	16,410	3.3%	9.2
4	Spain	120,187	6.6%	44,362	9.0%	2.7
5	Turkey	100,050	5.5%	15,270	3.1%	6.6
6	France	89,452	4.9%	35,201	7.2%	2.5
7	South Korea	80,849	4.5%	7,037	1.4%	11.5
8	Japan	79,262	4.4%	13,579	2.8%	5.8
9	Switzerland	75,784	4.2%	18,148	3.7%	4.2
10	Brazil	63,320	3.5%	13,158	2.7%	4.8
11	Germany	60,789	3.4%	31,014	6.3%	2.0
12	Russia	48,400	2.7%	17,683	3.6%	2.7
13	Kuwait	36,560	2.0%	3,529	0.7%	10.4
14	Colombia	34,039	1.9%	3,252	0.7%	10.5
15	Taiwan	32,655	1.8%	5,176	1.1%	6.3
16	Thailand	28,846	1.6%	4,502	0.9%	6.4
17	Poland	25,349	1.4%	6,646	1.4%	3.8
18	Oman	23,629	1.3%	3,033	0.6%	7.8
19	Argentina	19,722	1.1%	5,947	1.2%	3.3
20	Mexico	17,449	1.0%	4,078	0.8%	4.3

Source: English UK, 2017; n=413 state and private sector member centres

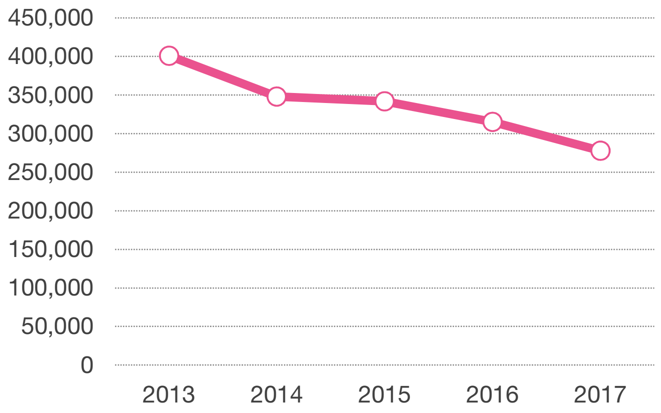
Of all student weeks in the UK ELT sector, 85% were produced by the top 20 source countries. These accounted for 86% of English language students.

The sector was dominated by students from the EU (58%). The majority of this share was delivered by Italy, Spain, France and Germany (49%). At the same time, non-EU students produced almost two thirds of all student weeks. Their average stay was therefore longer (5.5 weeks) than that of EU students (2.3 weeks).

STATE SECTOR MEMBER CENTRES

MARKET OVERVIEW

Chart 5: Student weeks taught by English UK state sector members



Source: English UK, 2013-2017

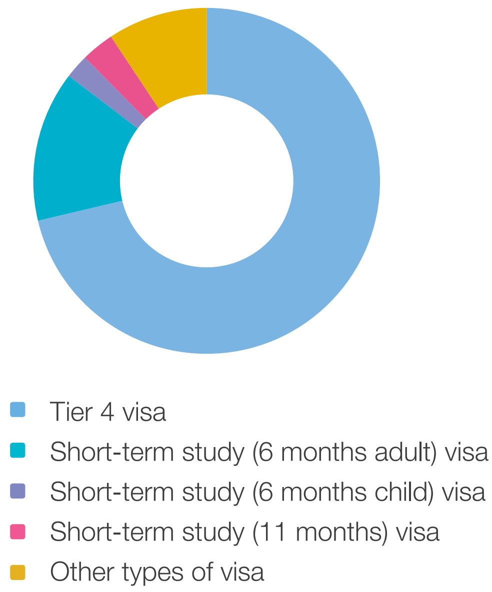
Sixty-seven state sector member centres participated in the collection of student statistics in 2017: 41 FE and 26 HE institutions.

The 31,486 students at English UK state sector centres in 2017 attended English courses for a total of 277,888 weeks – figures 12% lower than those for 2016.

A comparison of members reporting in both 2016 and 2017 revealed the following student week figures:

	Student weeks
2016 (n=65)	296,919
2017 (n=65)	268,947
Change (%)	-9%

Chart 6: Student numbers by visa type (state sector)



Source: English UK, 2017

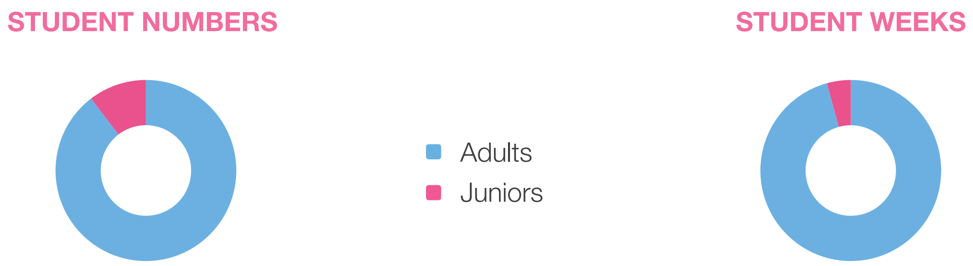
The FE and HE institutions primarily hosted Tier 4 visa type students (71%). The share of this type of visa increased at the expense of the Short-term study (6 months adult) visa, which accounted for 14% of students in 2017 (as compared to 23% in 2016). A minor decline in share can also be noticed among the Short-term study (6 months child) visa holders and Short-term study (11 months) visa holders (2% and 3% respectively).

The average number of visa denials per state sector member stood at 6 and remained unchanged since 2016.

STATE SECTOR MEMBER CENTRES

ADULT VS JUNIOR SEGMENT

Chart 7: Share of adults and juniors out of the total number of students and student weeks in the UK (state sector)

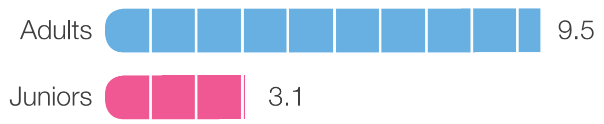


Source: English UK, 2017; n=59 state sector member centres

The state sector membership data analysis presented on the following pages is based on various samples of state sector member centres (depending on their ability to provide various breakdowns). The sample is always noted below each respective chart or table.

Due to the nature of state sector membership, the centres are primarily attended by adult students. In 2017, junior English language learners represented 10% of their student base, accounting for 4% of all student weeks.

Chart 8: Average length of stay (weeks, state sector)



Source: English UK, 2017; n=59 state sector member centres

Course length averaged out at 8.8 weeks, with adult students staying an average of 9.5 weeks.

STATE SECTOR MEMBER CENTRES

SOURCE MARKETS

Table 2: Student weeks, students and average length of stay (weeks) by source region (state sector, rank by student weeks)

Source region	Student weeks (2017)	Share (%)	Student numbers (2017)	Share (%)	Average length of stay (2017)
Asia	123,528	59.8%	15,998	61.3%	7.7
Middle East	29,296	14.2%	2,580	9.9%	11.4
Western Europe	24,133	11.7%	4,960	19.0%	4.9
Eastern Europe	21,649	10.5%	1,664	6.4%	13.0
Latin America	4,859	2.4%	523	2.0%	9.3
Africa	2,786	1.3%	362	1.4%	7.7
North America	279	0.1%	26	0.1%	10.7
Australasia	48	< 0.1%	3	< 0.1%	16.0

Source: English UK, 2017; n=52 state sector member centres
Note: Percentages do not add up to 100% due to rounding.

Asia is the leading source region for state sector English language providers. It produces over four times more student weeks and over six times more students than the second most represented region, the Middle East.

With regards to nationality breakdown, countries such as Japan, Poland and Thailand occupy a higher rank in the state sector than in private centres. On the other hand, France, Germany, Russia and Brazil are more important source markets for the private sector. Polish students also recorded the largest average number of weeks per student spent studying English at a state sector centre. The reported 20.5 weeks is over two and half times more than the overall average length of stay.

Table 3: Student weeks, students and average length of stay (weeks) by source market (state sector, rank by student weeks)

Rank	Country/region	Student weeks (2017)	Share (%)	Student numbers (2017)	Share (%)	Average length of stay (2017)
1	China	87,124	42.2%	10,750	41.2%	8.1
2	Saudi Arabia	16,740	8.1%	1,469	5.6%	11.4
3	Japan	15,532	7.5%	2,554	9.8%	6.1
4	Poland	11,781	5.7%	576	2.2%	20.5
5	South Korea	7,765	3.8%	1,073	4.1%	7.2
6	Spain	5,910	2.9%	1,151	4.4%	5.1
7	Italy	4,769	2.3%	1,536	5.9%	3.1
8	Thailand	4,244	2.1%	522	2.0%	8.1
9	Taiwan	4,121	2.0%	560	2.1%	7.4
10	Kuwait	3,333	1.6%	293	1.1%	11.4
11	Turkey	2,787	1.3%	366	1.4%	7.6
12	Syria	2,463	1.2%	169	0.6%	14.6

Rank	Country/region	Student weeks (2017)	Share (%)	Student numbers (2017)	Share (%)	Average length of stay (2017)
13	United Kingdom	2,160	1.0%	184	0.7%	11.7
14	France	1,944	0.9%	407	1.6%	4.8
15	Other Western Europe	1,813	0.9%	208	0.8%	8.7
16	Bulgaria	1,803	0.9%	112	0.4%	16.1
17	Other Africa	1,603	0.8%	202	0.8%	7.9
18	Panama	1,510	0.7%	108	0.4%	14.0
19	Romania	1,317	0.6%	155	0.6%	8.5
20	Germany	1,291	0.6%	417	1.6%	3.1
21	Russia	1,246	0.6%	214	0.8%	5.8
22	Kazakhstan	1,242	0.6%	129	0.5%	9.6
23	Brazil	1,122	0.5%	175	0.7%	6.4
24	Qatar	982	0.5%	140	0.5%	7.0
25	Hong Kong	951	0.5%	110	0.4%	8.6
26	Oman	947	0.5%	107	0.4%	8.9
27	Colombia	917	0.4%	94	0.4%	9.8
28	Pakistan	911	0.4%	97	0.4%	9.4
29	United Arab Emirates	896	0.4%	75	0.3%	11.9
30	Portugal	866	0.4%	110	0.4%	7.9
31	Other Asia/Far East	838	0.4%	73	0.3%	11.5
32	Switzerland	788	0.4%	191	0.7%	4.1
33	Libya	776	0.4%	50	0.2%	15.5
34	Iran	757	0.4%	71	0.3%	10.7
35	Latvia	753	0.4%	46	0.2%	16.4
37	Iraq	693	0.3%	50	0.2%	13.9
36	Jordan	675	0.3%	59	0.2%	11.4
38	Hungary	673	0.3%	57	0.2%	11.8
39	Czech Republic	658	0.3%	116	0.4%	5.7
40	Vietnam	588	0.3%	88	0.3%	6.7
41	Greece	529	0.3%	65	0.2%	8.1
42	Cyprus	515	0.2%	53	0.2%	9.7
43	Bahrain	460	0.2%	39	0.1%	11.8
44	Netherlands	396	0.2%	145	0.6%	2.7
45	India	388	0.2%	46	0.2%	8.4
46	Chile	386	0.2%	44	0.2%	8.8
47	Lithuania	377	0.2%	37	0.1%	10.2
48	Nigeria	362	0.2%	36	0.1%	10.1

STATE SECTOR MEMBER CENTRES

SOURCE MARKETS

Rank	Country/region	Student weeks (2017)	Share (%)	Student numbers (2017)	Share (%)	Average length of stay (2017)
49	Slovakia	344	0.2%	41	0.2%	8.4
50	Indonesia	303	0.1%	36	0.1%	8.4
51	Mexico	276	0.1%	22	0.1%	12.5
52	Other Middle East	273	0.1%	24	0.1%	11.4
53	Ukraine	243	0.1%	31	0.1%	7.8
54	Sweden	239	0.1%	20	0.1%	12.0
55	Egypt	237	0.1%	25	0.1%	9.5
56	Angola	231	0.1%	20	0.1%	11.6
57	Albania	225	0.1%	29	0.1%	7.8
58	Estonia	188	0.1%	9	< 0.1%	20.9
59	Ecuador	178	0.1%	21	0.1%	8.5
60	USA	170	0.1%	15	0.1%	11.3
61	Morocco	164	0.1%	60	0.2%	2.7
62	Norway	161	0.1%	18	0.1%	8.9
63	Macao	157	0.1%	11	< 0.1%	14.3
64	Denmark	149	0.1%	76	0.3%	2.0
65	Algeria	144	0.1%	15	0.1%	9.6
	Belgium	144	0.1%	19	0.1%	7.6
67	Malaysia	140	0.1%	11	< 0.1%	12.7
68	Venezuela	123	0.1%	6	< 0.1%	20.5
69	Argentina	120	0.1%	24	0.1%	5.0
70	Azerbaijan	116	0.1%	9	< 0.1%	12.9
71	Lebanon	106	0.1%	10	< 0.1%	10.6
72	Peru	104	0.1%	11	< 0.1%	9.5
73	Yemen	103	< 0.1%	11	< 0.1%	9.4
74	Other Eastern/Central Europe	79	< 0.1%	23	0.1%	3.4
75	Palestine	71	< 0.1%	10	< 0.1%	7.1
76	Mongolia	70	< 0.1%	5	< 0.1%	14.0
	Singapore	70	< 0.1%	6	< 0.1%	11.7
78	Finland	65	< 0.1%	9	< 0.1%	7.2
	Philippines	65	< 0.1%	6	< 0.1%	10.8
80	Austria	60	< 0.1%	24	0.1%	2.5
81	Belarus	56	< 0.1%	6	< 0.1%	9.3
82	Canada	55	< 0.1%	6	< 0.1%	9.2
	Iceland	55	< 0.1%	12	< 0.1%	4.6
84	Other North America	54	< 0.1%	5	< 0.1%	10.8

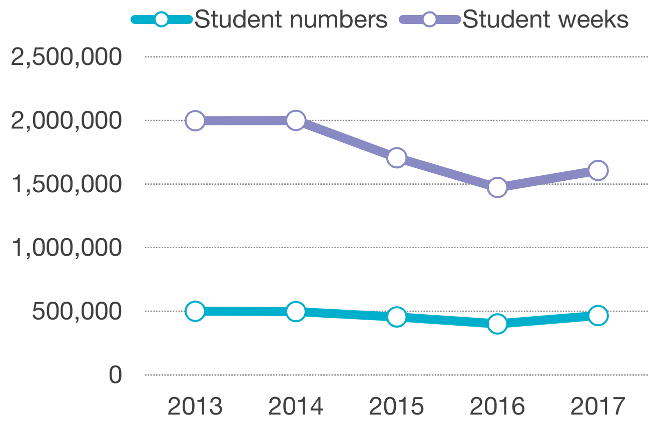
Rank	Country/region	Student weeks (2017)	Share (%)	Student numbers (2017)	Share (%)	Average length of stay (2017)
85	Australia	48	< 0.1%	3	< 0.1%	16.0
86	Croatia	46	< 0.1%	8	< 0.1%	5.8
87	Tunisia	45	< 0.1%	4	< 0.1%	11.3
88	Serbia	39	< 0.1%	4	< 0.1%	9.8
89	Turkmenistan	36	< 0.1%	3	< 0.1%	12.0
90	Costa Rica	34	< 0.1%	2	< 0.1%	17.0
	Uruguay	34	< 0.1%	2	< 0.1%	17.0
	Uzbekistan	34	< 0.1%	3	< 0.1%	11.3
93	Other Central America	24	< 0.1%	2	< 0.1%	12.0
94	Cambodia	23	< 0.1%	2	< 0.1%	11.5
	Nepal	23	< 0.1%	29	< 0.1%	0.8
96	Israel	21	< 0.1%	3	< 0.1%	7.0
97	Other South America	19	< 0.1%	11	< 0.1%	1.7
98	Moldova	18	< 0.1%	3	< 0.1%	6.0
99	Tajikistan	17	< 0.1%	2	< 0.1%	8.5
100	Georgia	16	< 0.1%	3	< 0.1%	5.3
101	Bosnia and Herzegovina	14	< 0.1%	4	< 0.1%	3.5
	Slovenia	14	< 0.1%	7	< 0.1%	2.0
103	Armenia	12	< 0.1%	2	< 0.1%	6.0
	Bolivia	12	< 0.1%	1	< 0.1%	12.0
105	Luxembourg	7	< 0.1%	2	< 0.1%	3.5
106	Macedonia	2	< 0.1%	1	< 0.1%	2.0
107	Ireland	0	0%	0	0%	0
	Kyrgyzstan	0	0%	0	0%	0
	Liechtenstein	0	0%	0	0%	0
	Monaco	0	0%	0	0%	0
	Montenegro	0	0%	0	0%	0
	New Zealand	0	0%	0	0%	0
	Other Australasia	0	0%	0	0%	0
	Paraguay	0	0%	0	0%	0
	Total	**206,578**	**100%**	**26,116**	**100%**	

Source: English UK, 2017; n=52 state sector member centres
Note: The total sum of student weeks and student numbers in Table 2 and Table 3 does not match the number of students and student weeks in state sector member centres stated on Page 12, due to differences in sample size.

PRIVATE SECTOR MEMBER CENTRES

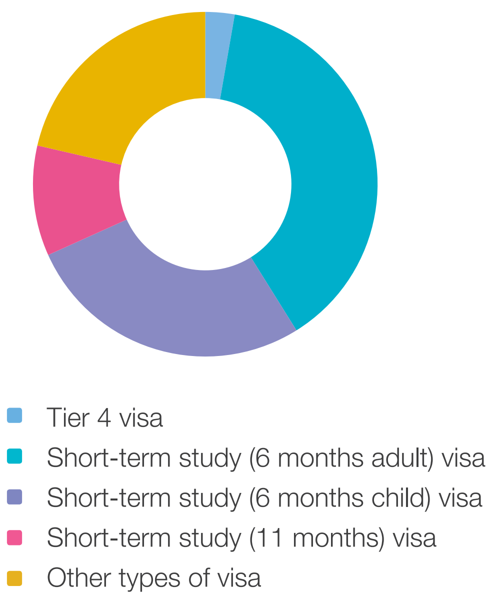
MARKET OVERVIEW

Chart 9: Student numbers and student weeks taught by English UK private sector members



Source: English UK, 2013-2017

Chart 10: Student numbers by visa type (private sector)



Source: English UK, 2017

In 2017, English UK had 365 English UK private sector member centres. Of these, 361 reported their data, including 15 new member centres. Overall, private sector members welcomed 465,542 English students and generated 1,606,280 student weeks.

Unlike the state sector centres, private members reversed the declining trend, recording a 16% increase in student numbers and a 9% increase in student weeks over 2016.

Indicators from centres that reported for both 2016 and 2017 yield the comparison below:

	Student numbers	Student weeks
2016 (n=346)	394,591	1,444,281
2017 (n=346)	456,463	1,576,887
Change (%)	+16%	+9%

On average, an English UK private centre registered 728 adults studying for a total of 3,893 weeks. While these figures represent an increase over 2016, juniors per centre grew even more significantly – 927 students (growth of 26%) and 1,773 weeks (growth of 18%).

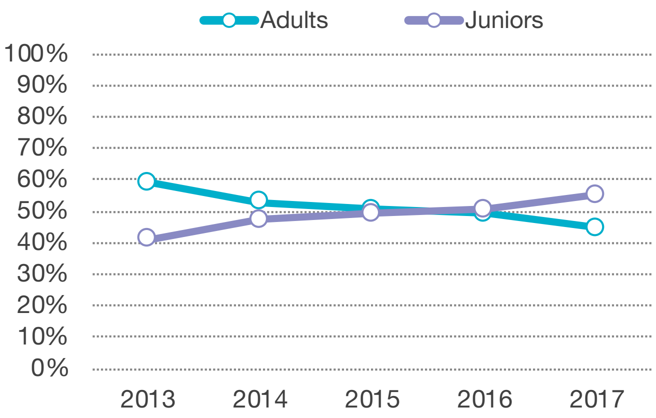
The visa type distribution remains similar to that of previous years, with Short-term study (6 months adult) visas granted to 38% of students. The second highest share was exhibited by students on Short-term study (6 months child) visas, at 29%.

The share of students on 'Other' visa types continued its growth in 2017, reaching 24%.

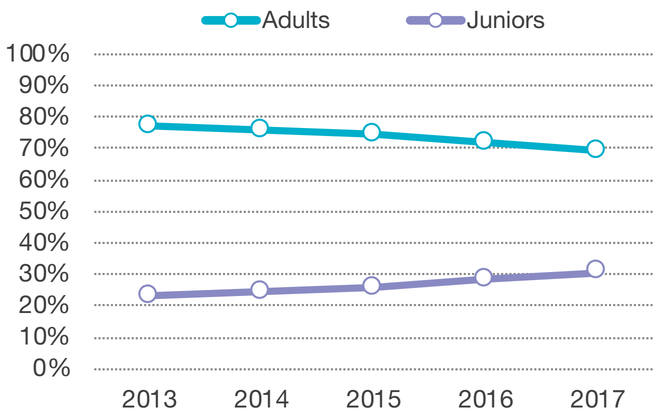
ADULT VS JUNIOR SEGMENT

Chart 11: Share of adults and juniors out of the total number of students and student weeks in the UK (private sector)

STUDENT NUMBERS



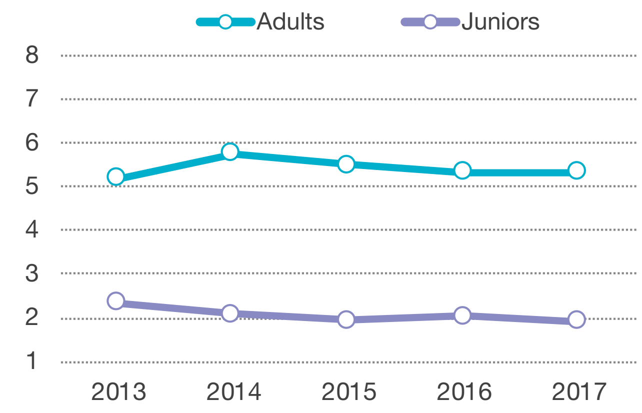
STUDENT WEEKS



Source: English UK, 2013-2017

The junior segment rose faster in 2017 than the adult band, both in terms of absolute figures and percentage growth. While the junior student numbers in the private sector went up by 27% to reach 257,571, adults increased by 5% to 207,971. As a result, juniors represented 55% of all English language learners in English UK private sector membership. Their share of student weeks was 31% (28% in 2016).

Chart 12: Average length of stay (weeks, private sector)



Source: English UK, 2013-2017

Two more private sector centres enrolled junior students in 2017 (278 in total) than in 2016 despite the decrease in the number of reporting centres.

The average length of stay at private sector members is shorter than that at state sector members. At 5.3 weeks for adults and 1.9 weeks for juniors, almost no change was recorded from the previous year.

PRIVATE SECTOR MEMBER CENTRES

SOURCE REGIONS

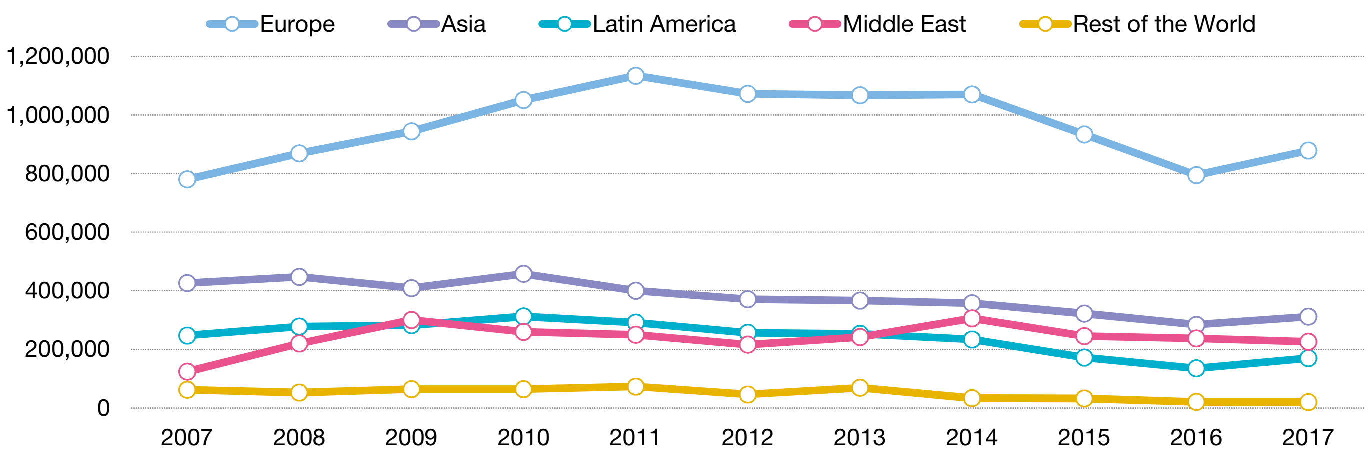
Table 4: Student weeks, students and average length of stay (weeks) by source region (private sector, rank by student weeks)

Source region	Student weeks (2016)	Student weeks (2017)	Share (%, 2017)	Change in student weeks (%)	Student numbers (2016)	Student numbers (2017)	Share (%, 2017)	Change in student numbers (%)	Average length of stay (2017)
Western Europe	697,085	765,096	47.6%	**9.8%**	259,380	296,569	63.7%	**14.3%**	2.6
Asia	284,117	311,666	19.4%	**9.7%**	53,669	64,729	13.9%	**20.6%**	4.8
Middle East	237,012	226,315	14.1%	**-4.5%**	26,102	27,042	5.8%	**3.6%**	8.4
Latin America	135,193	170,107	10.6%	**25.8%**	25,952	31,986	6.9%	**23.3%**	5.3
Eastern Europe	97,522	113,209	7.0%	**16.1%**	32,563	41,457	8.9%	**27.3%**	2.7
Africa	19,158	17,919	1.1%	**-6.5%**	3,363	3,274	0.7%	**-2.6%**	5.5
North America	1,841	1,697	0.1%	**-7.8%**	508	444	0.1%	**-12.6%**	3.8
Australasia	284	271	< 0.1%	**-4.6%**	59	41	< 0.1%	**-30.5%**	6.6

Source: English UK, 2017

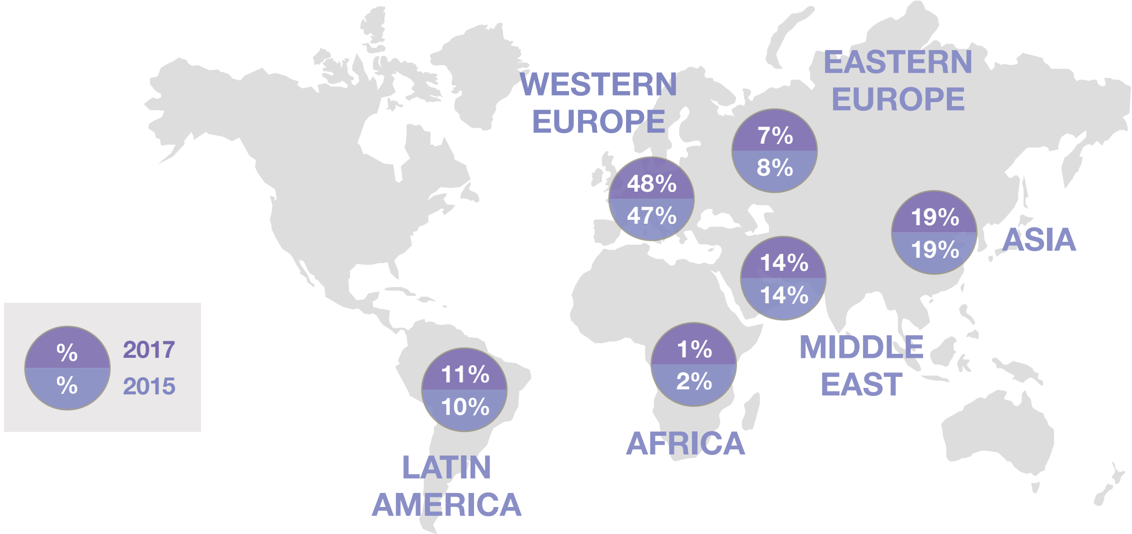
After a continuous decline in student weeks sourced from Europe, 2017 was the first year of growth in the region since 2012 (with the exception of a minor upturn in 2014). Percentage-wise, the most significant increase in terms of student weeks came from Latin America. The Middle East was unable to keep up with the overall growth trend and continued to record a decrease. Despite a positive development in both numbers and weeks from Asia, the UK's share of the market has remained unchanged in the past two years (19%), while the region has increased its presence globally in ELT destinations (from 38% in 2014 to 45% in 2016).

Chart 13: Student weeks by source region (2007-2017, private sector)



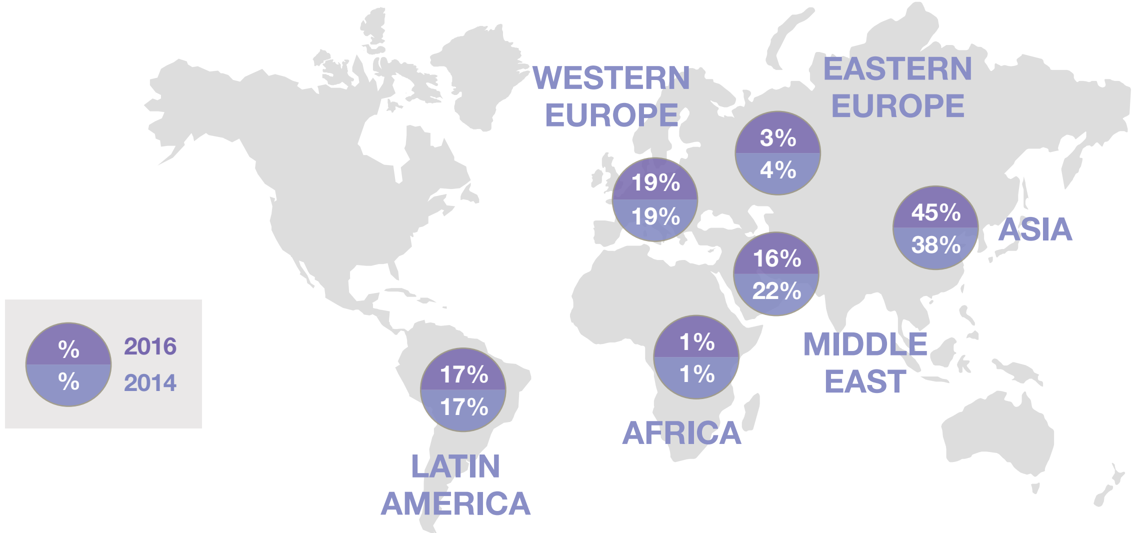
Source: English UK, 2007-2017

Chart 14: Source region market shares (UK ELT, student weeks at private sector centres, 2015 vs 2017)



Source: English UK, 2017
Note: A comparison of 2015 and 2017 figures does not reflect fluctuation in English UK membership.

Chart 15: Source region market shares (global ELT, student weeks, 2014 vs 2016)



Source: StudentMarketing, 2017
Note: Complete figures for 2017 were unavailable at the time of compilation of this report. Percentages do not add up to 100% due to rounding.

PRIVATE SECTOR MEMBER CENTRES

SOURCE MARKETS

Of the 114 source markets measured, 63 exhibited a positive development in 2017 (as compared with 41 growing markets in 2016). The leading ten markets represented 85% of all student weeks. EU countries accounted for 39% of all student weeks and 60% of student numbers, with an average length of stay of 2.3 weeks (5.2 weeks for non-EU countries).

Italy remains the number one source market for the UK, experiencing a 18.4% increase in student weeks from 2016 to 2017 (+41,223 student weeks) which elevated its student weeks to above 2015 levels. France dropped to the sixth position, being overtaken by China and Turkey, both of which grew at double-digit pace (+14.9% and +17.8% respectively).

Table 5: Student weeks, students and average length of stay (weeks) by source market (private sector, rank by student weeks)

Rank	Country/region	Student weeks (2016)	Student weeks (2017)	Share (%, 2017)	Change in student weeks (%)	Student numbers (2016)	Student numbers (2017)	Share (%, 2017)	Change in student numbers (%)	Average length of stay (2017)
1	Italy	224,139	265,362	16.5%	18.4%	99,234	128,357	27.6%	29.3%	2.1
2	Saudi Arabia	141,120	134,301	8.4%	-4.8%	14,986	14,941	3.2%	-0.3%	9.0
3	Spain	110,730	114,277	7.1%	3.2%	38,876	43,211	9.3%	11.2%	2.6
4	China	85,328	98,011	6.1%	14.9%	24,741	33,923	7.3%	37.1%	2.9
5	Turkey	82,541	97,263	6.1%	17.8%	13,232	14,904	3.2%	12.6%	6.5
6	France	87,105	87,508	5.4%	0.5%	35,842	34,794	7.5%	-2.9%	2.5
7	Switzerland	70,886	74,996	4.7%	5.8%	17,661	17,957	3.9%	1.7%	4.2
8	South Korea	70,868	73,084	4.5%	3.1%	6,135	5,964	1.3%	-2.8%	12.3
9	Japan	63,397	63,730	4.0%	0.5%	11,589	11,025	2.4%	-4.9%	5.8
10	Brazil	40,552	62,198	3.9%	53.4%	8,463	12,983	2.8%	53.4%	4.8
11	Germany	60,595	59,498	3.7%	-1.8%	31,111	30,597	6.6%	-1.7%	1.9
12	Russia	32,460	47,154	2.9%	45.3%	10,712	17,469	3.8%	63.1%	2.7
13	Kuwait	36,662	33,227	2.1%	-9.4%	3,123	3,236	0.7%	3.6%	10.3
14	Colombia	26,234	33,122	2.1%	26.3%	2,591	3,158	0.7%	21.9%	10.5
15	Taiwan	23,636	28,534	1.8%	20.7%	3,637	4,616	1.0%	26.9%	6.2
16	Thailand	20,685	24,602	1.5%	18.9%	3,188	3,980	0.9%	24.8%	6.2
17	Oman	21,112	22,682	1.4%	7.4%	2,339	2,926	0.6%	25.1%	7.8
18	Argentina	16,441	19,602	1.2%	19.2%	5,063	5,923	1.3%	17.0%	3.3
19	Mexico	17,011	17,173	1.1%	1.0%	4,511	4,056	0.9%	-10.1%	4.2
20	Chile	13,687	14,770	0.9%	7.9%	2,360	2,331	0.5%	-1.2%	6.3
21	Poland	12,631	13,568	0.8%	7.4%	5,080	6,070	1.3%	19.5%	2.2
22	Austria	10,597	12,144	0.8%	14.6%	6,876	8,601	1.8%	25.1%	1.4
23	Belgium	9,980	10,841	0.7%	8.6%	3,337	3,678	0.8%	10.2%	2.9
24	Netherlands	8,660	9,396	0.6%	8.5%	3,244	3,805	0.8%	17.3%	2.5
25	Czech Republic	9,341	9,229	0.6%	-1.2%	4,086	4,351	0.9%	6.5%	2.1
26	Portugal	8,736	9,136	0.6%	4.6%	2,635	2,857	0.6%	8.4%	3.2

Brazil entered the top 10 ranking thanks to a 53% growth in both weeks and numbers, outpacing Germany. The country saw the second highest increase in absolute student weeks (+21,646) after Italy. Besides these two markets, significant increases in student weeks were recorded in Turkey, Russia and China. Considering the pace of growth, the UK also did well in Hong Kong (+49.1%), Colombia (+26.3%), Taiwan (+20.7%), Argentina (+19.2%) and Thailand (+18.9%).

On the other hand, it faced the greatest declines from markets in the Middle East (Saudi Arabia, Kuwait, the UAE and Libya).

Rank	Country/region	Student weeks (2016)	Student weeks (2017)	Share (%, 2017)	Change in student weeks (%)	Student numbers (2016)	Student numbers (2017)	Share (%, 2017)	Change in student numbers (%)	Average length of stay (2017)
27	Hong Kong	6,111	9,113	0.6%	49.1%	1,439	2,041	0.4%	41.8%	4.5
28	Qatar	8,906	8,805	0.5%	-1.1%	841	766	0.2%	-8.9%	11.5
29	Ukraine	7,760	8,517	0.5%	9.8%	2,602	2,939	0.6%	13.0%	2.9
30	Kazakhstan	7,178	8,210	0.5%	14.4%	1,567	2,111	0.5%	34.7%	3.9
31	Sweden	6,845	7,517	0.5%	9.8%	1,668	1,967	0.4%	17.9%	3.8
32	United Arab Emirates	9,321	6,841	0.4%	-26.6%	1,008	978	0.2%	-3.0%	7.0
33	United Kingdom	4,786	5,541	0.3%	15.8%	1,153	1,427	0.3%	23.8%	3.9
34	Venezuela	5,317	5,009	0.3%	-5.8%	495	640	0.1%	29.3%	7.8
35	Algeria	4,901	4,997	0.3%	2.0%	650	741	0.2%	14.0%	6.7
37	Israel	4,503	4,658	0.3%	3.4%	1,762	2,187	0.5%	24.1%	2.1
36	Peru	3,827	4,171	0.3%	9.0%	635	654	0.1%	3.0%	6.4
38	Other Africa	3,447	4,148	0.3%	20.3%	621	659	0.1%	6.1%	6.3
39	Panama	2,268	4,049	0.3%	78.5%	217	343	0.1%	58.1%	11.8
40	Bulgaria	4,634	3,871	0.2%	-16.5%	1,038	976	0.2%	-6.0%	4.0
41	Morocco	3,911	3,785	0.2%	-3.2%	924	803	0.2%	-13.1%	4.7
42	Ecuador	3,416	3,635	0.2%	6.4%	368	421	0.1%	14.4%	8.6
43	Romania	3,117	3,630	0.2%	16.5%	1,112	1,190	0.3%	7.0%	3.1
44	Denmark	3,104	3,466	0.2%	11.7%	1,273	1,305	0.3%	2.5%	2.7
45	Hungary	3,909	3,442	0.2%	-11.9%	1,213	1,221	0.3%	0.7%	2.8
46	Iran	3,539	3,246	0.2%	-8.3%	531	392	0.1%	-26.2%	8.3
47	Greece	2,540	2,914	0.2%	14.7%	947	1,043	0.2%	10.1%	2.8
48	Slovakia	2,921	2,794	0.2%	-4.3%	1,212	991	0.2%	-18.2%	2.8
49	Jordan	3,160	2,780	0.2%	-12.0%	375	379	0.1%	1.1%	7.3
50	Iraq	1,216	2,551	0.2%	109.8%	147	193	< 0.1%	31.3%	13.2
51	Angola	3,119	2,440	0.2%	-21.8%	251	240	0.1%	-4.4%	10.2
52	Vietnam	1,759	2,333	0.1%	32.6%	355	589	0.1%	65.9%	4.0

PRIVATE SECTOR MEMBER CENTRES
SOURCE MARKETS

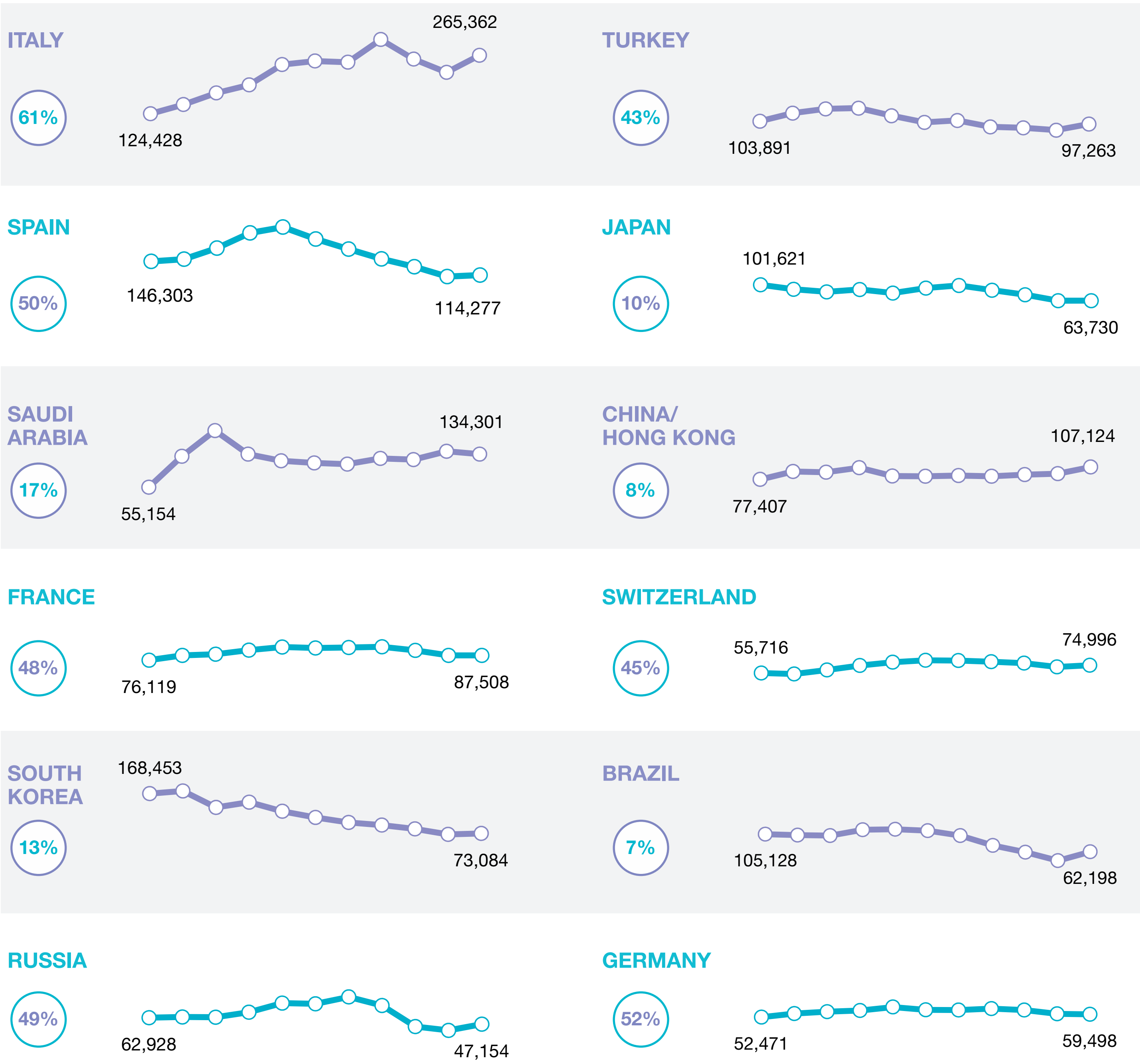
Rank	Country/region	Student weeks (2016)	Student weeks (2017)	Share (%, 2017)	Change in student weeks (%)	Student numbers (2016)	Student numbers (2017)	Share (%, 2017)	Change in student numbers (%)	Average length of stay (2017)
53	Bahrain	1,504	2,017	0.1%	34.1%	261	304	0.1%	16.5%	6.6
54	Uruguay	1,889	1,820	0.1%	-3.7%	501	495	0.1%	-1.2%	3.7
55	Indonesia	1,251	1,782	0.1%	42.4%	259	425	0.1%	64.1%	4.2
56	Syria	972	1,524	0.1%	56.8%	136	177	< 0.1%	30.1%	8.6
57	Norway	1,540	1,485	0.1%	-3.6%	654	627	0.1%	-4.1%	2.4
58	Tunisia	1,643	1,456	0.1%	-11.4%	551	571	0.1%	3.6%	2.5
59	Mongolia	1,574	1,444	0.1%	-8.3%	117	109	< 0.1%	-6.8%	13.2
60	Azerbaijan	1,583	1,414	0.1%	-10.7%	483	401	0.1%	-17.0%	3.5
61	Libya	3,276	1,413	0.1%	-56.9%	287	167	< 0.1%	-41.8%	8.5
62	Serbia	1,324	1,387	0.1%	4.8%	522	552	0.1%	5.7%	2.5
63	Other Asia/Far East	1,421	1,367	0.1%	-3.8%	245	223	< 0.1%	-9.0%	6.1
64	Belarus	1,423	1,362	0.1%	-4.3%	464	460	0.1%	-0.9%	3.0
65	Albania	1,298	1,321	0.1%	1.8%	185	215	< 0.1%	16.2%	6.1
66	Cyprus	1,333	1,318	0.1%	-1.1%	169	194	< 0.1%	14.8%	6.8
67	Other Central America	1,698	1,233	0.1%	-27.4%	274	326	0.1%	19.0%	3.8
68	Finland	997	1,228	0.1%	23.2%	520	560	0.1%	7.7%	2.2
69	Croatia	1,235	1,165	0.1%	-5.7%	475	485	0.1%	2.1%	2.4
70	Other Western Europe	1,808	1,094	0.1%	-39.5%	601	345	0.1%	-42.6%	3.2
71	India	940	1,061	0.1%	12.9%	259	375	0.1%	44.8%	2.8
72	Lithuania	1,148	1,037	0.1%	-9.7%	386	367	0.1%	-4.9%	2.8
73	Latvia	1,359	1,031	0.1%	-24.1%	394	331	0.1%	-16.0%	3.1
74	Other South America	708	1,030	0.1%	45.5%	109	226	< 0.1%	107.3%	4.6
75	Macao	1,090	1,012	0.1%	-7.2%	177	130	< 0.1%	-26.6%	7.8
76	Georgia	1,058	954	0.1%	-9.8%	321	332	0.1%	3.4%	2.9
77	Costa Rica	829	946	0.1%	14.1%	175	235	0.1%	34.3%	4.0
78	Uzbekistan	1,150	874	0.1%	-24.0%	279	264	0.1%	-5.4%	3.3
79	Egypt	1,493	867	0.1%	-41.9%	257	212	< 0.1%	-17.5%	4.1
80	Paraguay	608	856	0.1%	40.8%	86	122	< 0.1%	41.9%	7.0
81	Canada	817	814	0.1%	-0.4%	254	214	< 0.1%	-15.7%	3.8
82	USA	927	745	< 0.1%	-19.6%	239	199	< 0.1%	-16.7%	3.7
83	Yemen	318	738	< 0.1%	132.1%	31	78	< 0.1%	151.6%	9.5
84	Slovenia	719	712	< 0.1%	-1.0%	341	336	0.1%	-1.5%	2.1

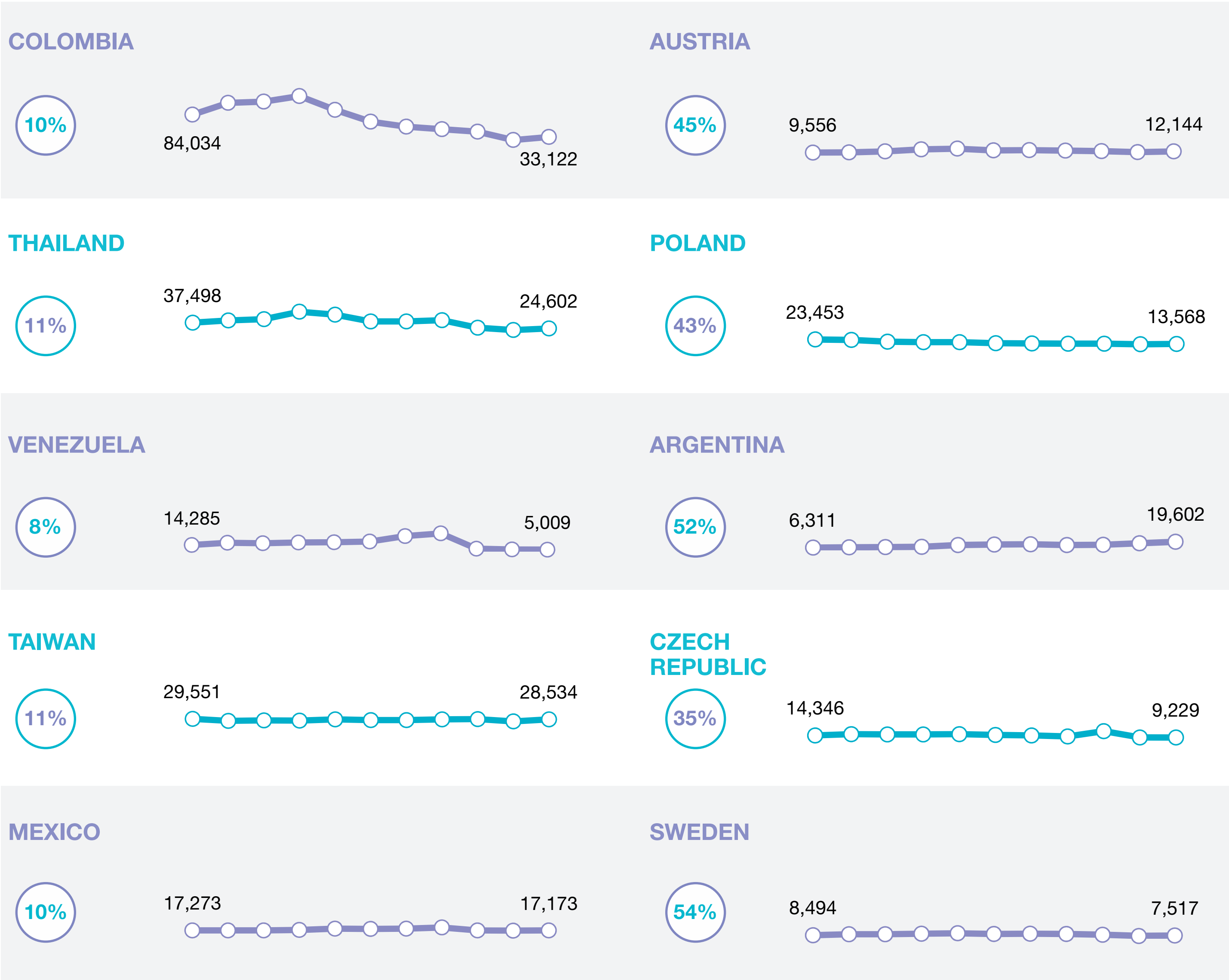
Rank	Country/region	Student weeks (2016)	Student weeks (2017)	Share (%, 2017)	Change in student weeks (%)	Student numbers (2016)	Student numbers (2017)	Share (%, 2017)	Change in student numbers (%)	Average length of stay (2017)
85	Malaysia	461	700	< 0.1%	**51.8%**	77	117	< 0.1%	**51.9%**	6.0
86	Other Middle East	666	649	< 0.1%	**-2.6%**	127	155	< 0.1%	**22.0%**	4.2
87	Estonia	569	593	< 0.1%	**4.2%**	288	329	0.1%	**14.2%**	1.8
88	Turkmenistan	341	589	< 0.1%	**72.7%**	51	74	< 0.1%	**45.1%**	8.0
89	Other Eastern/ Central Europe	829	573	< 0.1%	**-30.9%**	136	170	< 0.1%	**25.0%**	3.4
90	Luxembourg	411	536	< 0.1%	**30.4%**	177	198	< 0.1%	**11.9%**	2.7
91	Pakistan	472	535	< 0.1%	**13.3%**	93	112	< 0.1%	**20.4%**	4.8
92	Palestine	442	534	< 0.1%	**20.8%**	45	63	< 0.1%	**40.0%**	8.5
93	Kyrgyzstan	333	496	< 0.1%	**48.9%**	56	93	< 0.1%	**66.1%**	5.3
94	Bolivia	708	493	< 0.1%	**-30.4%**	104	73	< 0.1%	**-29.8%**	6.8
95	Armenia	537	437	< 0.1%	**-18.6%**	149	155	< 0.1%	**4.0%**	2.8
96	Iceland	368	421	< 0.1%	**14.4%**	132	172	< 0.1%	**30.3%**	2.4
97	Tajikistan	716	406	< 0.1%	**-43.3%**	222	36	< 0.1%	**-83.8%**	11.3
98	Lebanon	295	349	< 0.1%	**18.3%**	103	100	< 0.1%	**-2.9%**	3.5
99	Montenegro	303	273	< 0.1%	**-9.9%**	56	93	< 0.1%	**66.1%**	2.9
100	Philippines	319	261	< 0.1%	**-18.2%**	53	76	< 0.1%	**43.4%**	3.4
101	Cambodia	194	237	< 0.1%	**22.2%**	39	53	< 0.1%	**35.9%**	4.5
102	Nigeria	644	226	< 0.1%	**-64.9%**	109	48	< 0.1%	**-56.0%**	4.7
103	Bosnia and Herzegovina	285	223	< 0.1%	**-21.8%**	69	83	< 0.1%	**20.3%**	2.7
104	Moldova	255	220	< 0.1%	**-13.7%**	48	69	< 0.1%	**43.8%**	3.2
105	Liechtenstein	253	207	< 0.1%	**-18.2%**	65	93	< 0.1%	**43.1%**	2.2
106	Monaco	215	201	< 0.1%	**-6.5%**	47	59	< 0.1%	**25.5%**	3.4
107	Australia	189	191	< 0.1%	**1.1%**	42	24	< 0.1%	**-42.9%**	8.0
108	Other North America	97	138	< 0.1%	**42.3%**	15	31	< 0.1%	**106.7%**	4.5
109	Macedonia	100	129	< 0.1%	**29.0%**	31	30	< 0.1%	**-3.2%**	4.3
110	Singapore	179	77	< 0.1%	**-57.0%**	59	19	< 0.1%	**-67.8%**	4.1
111	Ireland	249	65	< 0.1%	**-73.9%**	95	12	< 0.1%	**-87.4%**	5.4
112	Nepal	105	63	< 0.1%	**-40.0%**	23	22	< 0.1%	**-4.3%**	2.9
113	Other Australasia	35	45	< 0.1%	**28.6%**	6	9	< 0.1%	**50.0%**	5.0
114	New Zealand	60	35	< 0.1%	**-41.7%**	11	8	< 0.1%	**-27.3%**	4.4
	Total	**1,472,212**	**1,606,280**	**100%**	**+9.1%**	**401,596**	**465,542**	**100%**	**+15.9%**	**3.5**

Source: English UK, 2017

PRIVATE SECTOR MEMBER CENTRES
SOURCE MARKETS

Chart 16: Performance of selected source markets (student weeks, private sector, 2007-2017) and the UK's estimated market share (2016)





Source: English UK, 2007-2017

CONCLUSIONS

It is great to read such a positive student statistics report after three years of decline: our challenge now is to support English UK members to keep this momentum going.

We support members' innovation with constantly improving market information – such as QUIC and this report – and with sustained promotional campaigns in priority markets. While some of the current upturn has been driven by currency fluctuations, we believe what we do for members is making a difference as we are seeing growth in many markets where we have focused our efforts. This will become more important as members work to sustain this new business. In the private sector:

- Italy saw the biggest growth, rising by 41,223 student weeks (compared with a decline of over 32,000 the previous year). We targeted this market with a successful event in 2017, combining an agent workshop and training with an afternoon aimed at secondary teachers.
- Brazil – supported by the successful English is GREAT campaign and a market report – showed the second biggest growth, rising 53.4 per cent and re-entering the top ten markets for the first time since 2013.
- Though a smaller market, Argentina recorded a second year of strong growth, with student weeks up 19 per cent, while Colombia had 26.3 per cent more private sector student weeks. During the past 3 years, we have run a student-facing Shakespeare Lives campaign and regional fairs in both of these countries, with an additional market report in Colombia.

Having robust data to support our understanding of the state sector is going to make a significant difference and giving us much to think about.

The state sector's biggest source, China has been a priority market for us for some time, with the annual China roadshow, inward agent missions and specialist delegations to StudyWorld as well as the opportunity for members to join fairs run by us and others.

We will be poring over the statistics as keenly as members as we plan marketing events and activities during the next year, increasingly improving our reach by linking these to those of partners and external providers. Our 2018 activities include:

- The Asia Pacific roadshow, visiting Thailand and Japan (the #3 source market for the state sector)
- The China roadshow, visiting Beijing, Chengdu and Shenzhen – covering the top sending market for the state sector and #4 for the private sector
- Specialist delegations at StudyWorld, including from Japan, China, the Gulf States and possibly Latin America
- Running the Education is GREAT village at ICEF Berlin
- English UK in Madrid – a networking and training event for agents and members, including an English UK village at the ASEPROCE workshop
- Ongoing programme of priority market reports and updates

We are not just focusing on marketing and good intelligence: we are supporting members to improve customer experience and quality through extensive industry-focused CPD, with a major focus on safeguarding for the growing junior market.

The UK sector has experienced a period of recovery in 2017. It is now important to build repeat business with smart marketing, innovation, and excellent customer service. If we all seize the opportunities, I believe we can look forward to another positive report this time next year.

Annie Wright
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English UK

NOTES

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