

UK outlook bright

While student numbers in the UK generally stagnated in 2001, student weeks increased, and schools forecast an even better year for 2002. GILLIAN EVANS reports.

The UK English language teaching market has had to work hard to retain student numbers in recent years because of a series of factors out of its control. 2001 was no exception, as Nigel Pamplin at Study Group explains. '2001 was a difficult year,' he says, 'with foot and mouth [disease], the strength of sterling and then [September] 11 all making an impact on UK sales.'

Year-end figures for 2001 at many schools were either down on the previous year or just the same, but the market has started making a good recovery in 2002. 'The initial months [after September 11] affected Japanese and some European business,' says Hayley Stewart from Regent Language Training. 'This was rectified by spring of 2002, [although it has] stabilised at a slight decrease in Japanese business.'

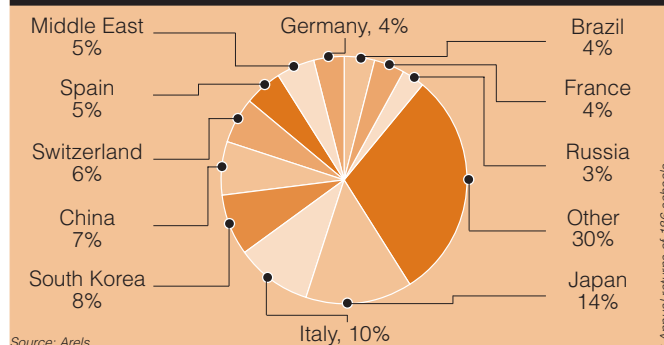
Pamplin confirms the European revival. 'Western European business slowed down significantly after [September 11] but has now recovered strongly.'

The growth in 2002 is affecting many schools. Commenting on reports from Arels members, Abby Penlington, Arels Marketing and Public Affairs Officer, says, 'The first quarter [of 2002] was down on last year but the market seems to be picking up with schools forecasting bookings to be up by between five and 20 per cent [by the end] of the year. Many schools are picking up business that was postponed [because of] foot-and-mouth disease and September 11. A general increase in international study travel seems to be happening [too].'

However, the market has changed post-September 11, according to Nick Hobson at Malvern House. 'September 11 has changed the marketing climate,' he asserts. 'We have noticed that the inflow of students in the



Top student nationalities by student weeks 2001*



London [area] is definitely diminished.' But Kevin McNally, Principal of the Hampstead School of English reports, 'London seems to be popular again.'

However, both McNally and Hobson agree that the UK appears to be picking up students who would have been studying in the USA. 'We are getting some students who cannot get into the US,' confirms McNally.

Penlington mentions a decrease in business executives. 'The global economic downturn and security concerns since September 11 seem to have adversely affected the executive market, with companies being reluctant to send employees on language courses,' she explains.

Another negative factor holding back some markets is visa issuance. 'The main long-term effect of September 11 has been the increased difficulty for students from the Middle East and

the 'Stans to obtain a UK visa,' says Penlington. Stewart at Regent mentions China and Turkey having visa issuance problems.

A further stumbling block to growth, this time in South America, is the adverse economic climate there, which has caused student numbers from Argentina and Brazil in particular to plummet. However, Stewart says they are witnessing a slight revival in Latin American numbers, which bodes well for next year.

China has been earmarked by most schools as the explosive market of the future, with numbers more than doubling since 1999, according to Arels, and demand expected to increase further since its acceptance into the World Trade Organisation.

All in all, according to many language schools in the UK, the outlook for the coming year is bright, and the hard times may be becoming easier.

On course

According to Arels, student weeks totalled 875,619 in 2001, and many schools report that, while student numbers largely remained static in 2001, student weeks increased. The steady increase in the average length of stay in recent years is borne out by the Arels statistics, which reveal that the average length of stay rose from 5.3 weeks in 1999 to 7.7 weeks in 2001.

'The average length of stay [at Study Group in the UK] significantly increased during 2001, whilst overall [student] numbers remained steady,' confirms Nigel Pamplin at Study Group. 'This was in part due to the downturn in Western European and South American business, which tends to be of a more short-term nature. However, it may also affect the changing needs of our students who are becoming more focused on their career goals.'

Janet Perkins at TW Languages recounts a similar experience. '[We have received] more enquiries for [courses of] three months plus to learn English. [More students want] to learn for career prospects.' Kevin McNally of the Hampstead School of English adds that many students are choosing 'study year programmes' and there is a definite swing towards 'longer courses and more intensive courses'. At Regent, says Hayley Stewart, they have launched a work experience, academic year and university foundation programme as a direct result of this trend towards longer, more serious courses.

Perkins believes that to remain competitive, schools have to provide English courses for university entrance, while at the same time devise other innovative programmes. Nick Hobson of Malvern House also highlights the importance of innovation. 'We see a need for sharper and more imaginative teaching 'products' to differentiate us from 'bog standard' [English providers] and [we] look forward to the challenge,' he says.