

UK seesaws

Many UK language schools experienced an extremely positive summer season this year after a testing period which saw many schools experiencing a decline in numbers. However, they still remain cautious in their forecasts for the year-end. GILLIAN EVANS finds out why.

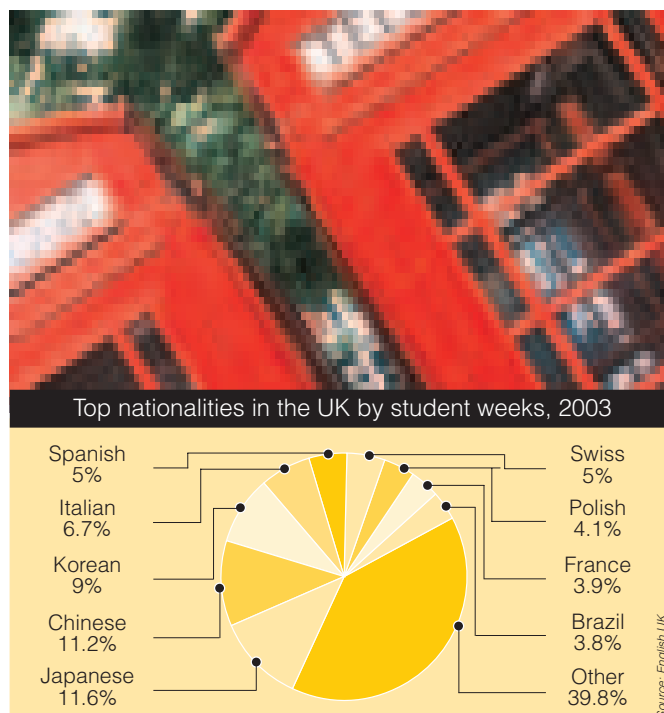
Despite many language schools in the UK reporting that they have experienced one of their busiest summer seasons this year, there is a certain cautiousness within the industry about forecasting 2004 year-end results. This is due to the particularly unpredictable performance of the market in 2003 and the beginning of 2004.

A number of external factors dampened overall market growth in 2003, notably the Sars outbreak, the Iraq war and economic problems in some markets, particularly in Latin America. This resulted in a mixed performance for the UK English language teaching market in 2003. Students International in Melton Mowbray – whose largest student nationality last year was Chinese – was one school that suffered. “As a direct result of the Sars outbreak only 10 per cent of our expected students arrived for summer school,” states Alison Blythe, the school’s director.

Jenny Bodenham, Agent Support Manager at Cicero Languages International in Tunbridge Wells, also reports a decline in student numbers in 2003, while Scott Anderson, Marketing Manager at SES Folkestone in Folkestone, says they only just managed to retain student numbers at 2002 levels.

However, there were some schools that fared better in 2003. According to Hayley Stewart, Marketing Manager at Regent Language Training, their student weeks grew by 38 per cent in 2003. This was for a number of reasons, she says, including “wider marketing efforts, the comeback of certain markets [and] the acquisition of a new school in Cambridge”.

Sandra Kaufman, Principal of the Manchester Academy of English in Manchester, reports a 19



per cent hike in student numbers in 2003 compared with 2002. However, she goes on to say, “This masks the fact that all the increase took place in the first five months of 2003 and, by the summer and for the rest of the year, the figures were in fact lower than in 2002.”

The patchy performance of 2003 also stretched into 2004 for some schools. Stuart Rubenstein, Principal of Camden College of English in London, reports a “poor first two quarters with an improved third quarter” for 2004.

With world economies largely improving and global conflicts no longer exerting such pressure on the market, the summer season for the UK English language teaching industry has been good. But there is one significant aspect that is holding back growth: visa issuance. Bodenham reports that one major restriction to the Chinese market is “the virtual impossibility of Chinese students obtaining a visa”.

Kaufman adds, “Cancellations because of visa refusals have played a large part in the drop in student numbers especially from China, Middle Eastern countries and Turkey.” She notes, “We estimate that we have had to refund over UK£100,000 (US\$182,800) in repaid fees to students who had paid deposits for our courses but then had their visas refused.”

In a bid to make improve visa issuing processes, the government recently announced plans to issue student visas for schools on an approved list only. It has also announced plans to move towards compulsory accreditation.

This may well ease visa troubles. But Rubenstein questions the government’s commitment to accreditation for all. “Tighter regulations and across-the-board accreditation would be welcomed, [but] whether it happens or not is another matter,” he says. “The government has only talked about the possibility of [introducing compulsory accreditation].”

English UK

Earlier this year, English UK, the group that unites both state and private sector language providers in the UK, was officially launched (see *Language Travel Magazine*, July 2004, page 7).

While members of the former state-sector association, Baselt, were largely in favour of the merger – with a 94 per cent acceptance rate at the time of voting – the private sector group, Arels was more cautious with an acceptance rate of 86 per cent.

Stuart Rubenstein, Principal of Camden College of English welcomes the merger, saying it creates “a powerful voice and lobbying group”. However, he adds a cautious note: “Hopefully the smaller independent schools will not be swallowed up.”

Scott Anderson, Marketing Manager at SES Folkestone is also largely positive about the benefits of the merger. “I consider this move to signal the start of a consolidation process in the industry and the death knell for many in the private sector that are poorly led and offering only basic facilities. Government-led policy initiatives and resulting institutional consolidation at the macro level is one of the main driving forces in the EFL industry.”

There are many advantages of a strong united national group, as Hayley Stewart of Regent Language Training underlines. “We were fully supportive of the merger as we felt that the benefits of a strong image for UK [English language teaching] outweighed any negatives. While we appreciate that state-sector institutions are different in some ways, we felt that the similarities far outnumber these.”

Stewart adds, “By being more representative of UK ELT, the new organisation should be able to lobby the UK government to understand the economic, social and cultural significance of English language training in the UK.”