

# Inbound Visitors who take an English language course



Foresight – issue 177

Visit Britain, September 2020

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# Background and methodology

VisitBritain sponsors a number of questions each year on the International Passenger Survey to gain a greater understanding of Britain's international visitors. This survey is conducted at dozens of ports of exit from the UK (air, sea and rail). In 2018, VisitBritain asked a question to provide information about visitors who undertook an English language course during their stay:

**Q: *Did you go on any English language courses while on this visit? Yes/No***

The question was answered by 56% of the survey respondents and throughout the analysis it is assumed that those responding to the question were representative of the entire population who took an English language course. It is also assumed that those who did not give an answer to this question did not take such a course.

# What is the importance of this audience?

BETA (the British Educational Travel Association) describes Great Britain as a ‘world class destination for young travellers to study, tour and work’, with the inbound youth, student and educational travel sector worth £27billion per annum to the UK economy.

This report focuses on one portion of this traveller group: those undertaking an English language course during their visit. The course could be their primary motivation for visiting (study visitors), be part of a broader holiday or business trip, or be an opportunity to visit friends and relatives in the UK. There are three key reasons that we sought to gather further insight on this audience, and why they are an important group to consider when it comes to strategy for UK inbound travel:

- 1. Valuable visits:** Visitors who took part in an English language course are distinguished from the average visitor by their long length of stay; 19 nights on average in 2018 compared to the overall average of 7 nights. This means that they spend more during their overall trip, constituting a valuable visitor group to capture.
- 2. Driving loyalty:** Repeat visitors are highly valuable to UK tourism; 63% of our visitors have travelled to the UK at least once before. English language courses may foster loyalty, as BETA reports that 80% of these students plan to return.
- 3. The UK economy:** Quoted by BETA, there were 35,700 UK jobs supported by English Language Training in 2018, and this industry provided £1.4bn GVA to the UK economy. Beyond this functional contribution, the continuing desirability of English language skills drives the UK’s soft power on the world stage.

*Source: Unlocking the Value of Youth, Student and Educational Travel (BETA, 2017), Youth Student and Educational Travel Statistics Report (BETA, 2018), International English students and their value to the UK (English UK, 2018), IPS 2018*

*Please note: statistics regarding English language students collected by English UK (2020) will differ from those offered in this report due to methodological differences*

# Key metrics of volume and value



# How many visitors to the UK take English language courses?

Of the 40.3 million inbound visits taken to the UK in 2018, **614,000** or **1.5%** were taken by those who undertook an English language course during their stay.



**614,000** visitors to the UK in 2018 took part in an English language course, constituting **1.5%** of visitors.



**4.1%** of visitor nights in 2018 were spent by those who took part in an English language course; a total of **12 million**.



This visitor group were the source of **£940 million** spent in the UK in 2018; this is **3.5%** of visitor spend.

# Average trip length and spend

By visitors who took part in an English language course



Visitors who took an English language course have markedly different trip characteristics compared with the average traveller to the UK. The key distinguishing feature is their **length of stay**; on average a visit from someone who took an English language course is 19 nights, compared to 7 nights for the average UK visitor.

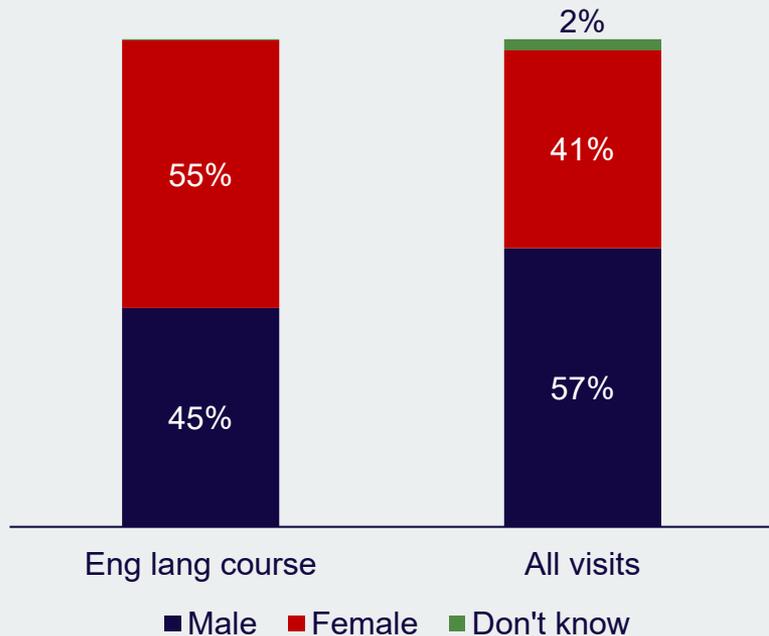
This length of stay leads to **higher overall value** stemming from these visitors. In fact, they spend more than twice as much per visit than the average UK visitor (£1,532 compared to £658). This is despite the fact that they spend 14% less on average per night.

# Visitor profile



# Visits by gender

Gender distribution of visitors who took an English language course (2018)

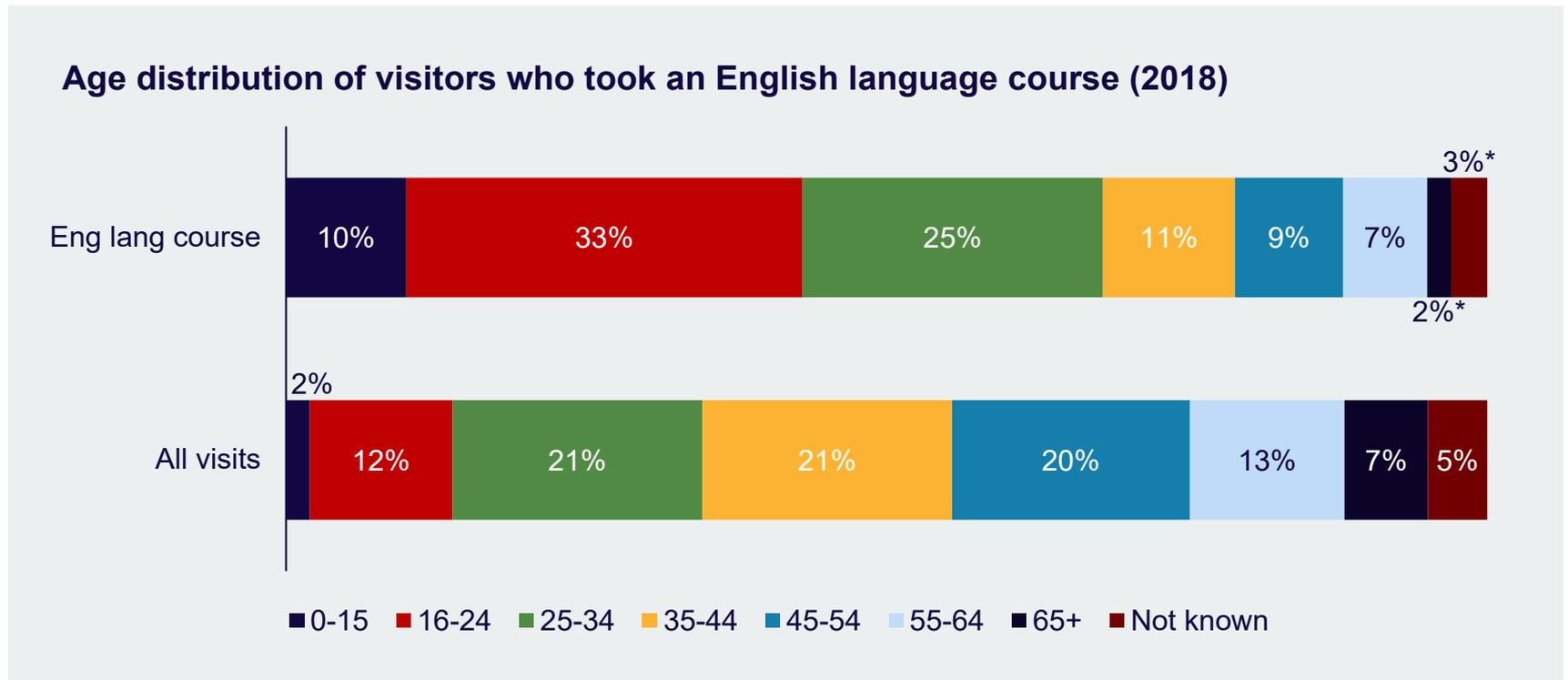


There is a **significant difference** between the gender distribution of those who have taken an English language course with the average UK visitor.

The **percentage of females** in the English language course group is significantly larger (55% vs. 41%), and the **proportion of males** is smaller (45% vs. 57%).

Also, among all UK visitors there is the presence of 2% whose gender is undetermined.

# Visits by age

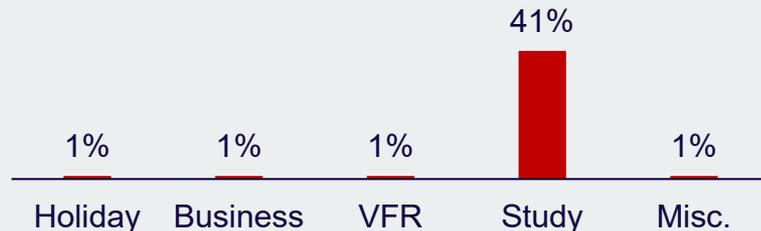


Those who take an English language course during their visit to the UK **are much more likely to fit into a younger age bracket** than the average visitor. The most prominent age band for this group is **16-24**, followed by **25-35**. Overall, 69% of visitors who took an English language course were aged under 35 in 2018, compared to the all visitor average of 34%.

# Visits by trip purpose

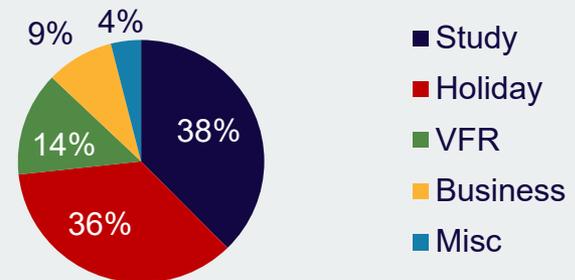
Focusing on those who took an English language course during their UK visit, they are similarly likely to report their journey purpose as being for **study** or for a **holiday** (38% and 36% respectively). This group over-indexes compared to the average visitor when it comes to the study journey purpose, which only constituted **1% of all visits** in 2018. They are also less than half as likely to be visiting friends or relatives than the average visitor (14% vs. 31% respectively).

## Proportion of visitors per journey purpose who took an English language course (2018)



Base: all answered (18,447)

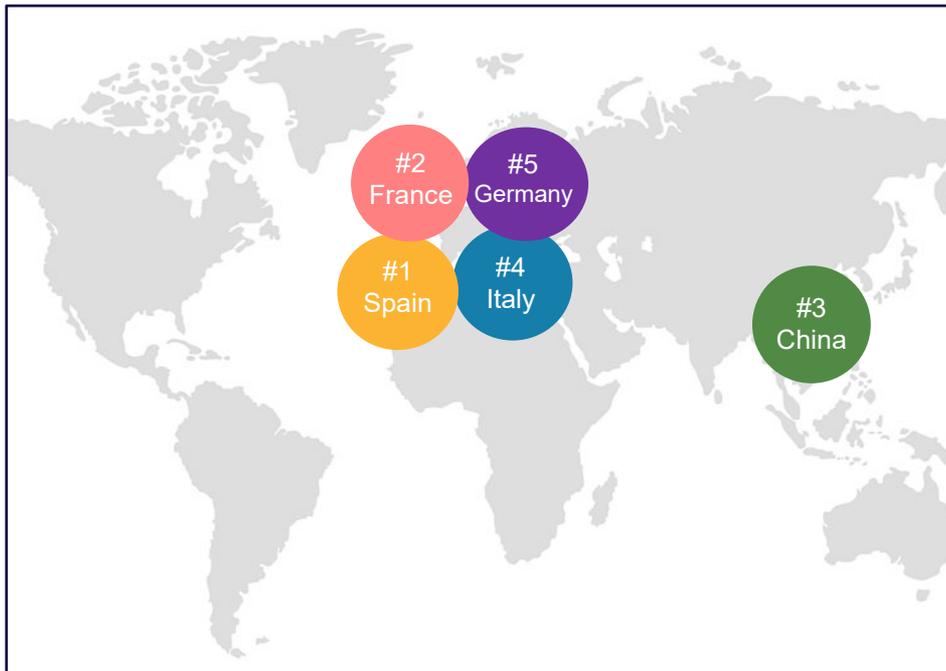
## Proportion of visitors who took an English language course by journey purpose (2018)



Examining each journey purpose group, we can see that a notable **41% of all visitors** who came to the UK to **study** in 2018 included an English language course as part of their visit. This demonstrates the desirability of English language skills for study visitors. Those who took an English language course constitute **low percentages** across all other journey purposes, only 1% each, although they still do add up to a large proportion of those taking an English language course.

# Top 10 source markets: visits

Visits by those who took an English language course (2018)

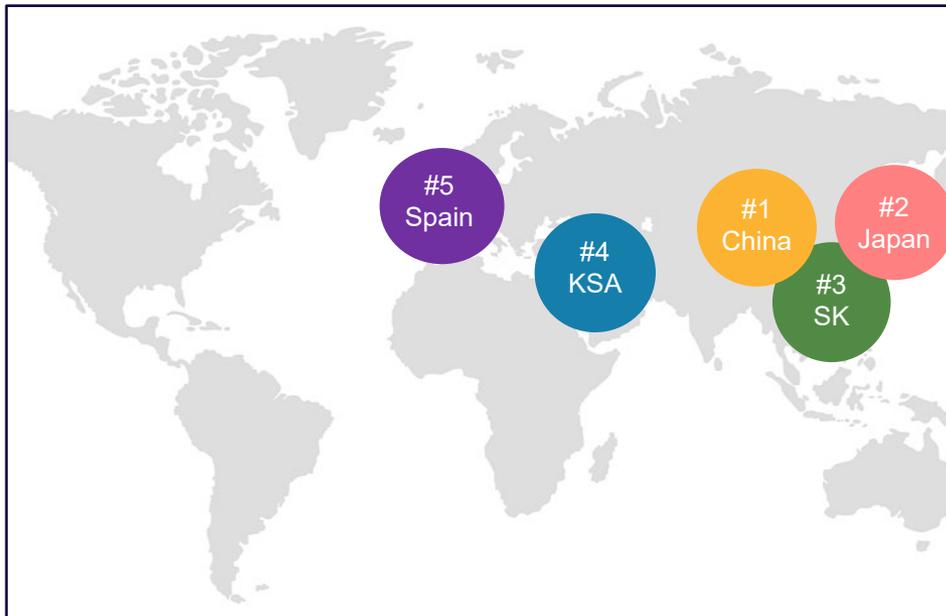


Rank	UK Rank*	Market	Visits in 2018
1	5	Spain	76,517
2	2	France	66,856
3	12	China	64,539
4	6	Italy	58,895
5	3	Germany	29,808
6	8	Poland	22,741
7	7	Netherlands	22,457
8	21	Japan	20,174
9	36	Russia	19,273
10	17	Norway	18,516

Out of the top ten source markets of visitors who take an English language course in the UK, **eight are within Europe**, with Spain ranking first globally for this visitor type. This may be the influence of proximity, and the utility of English language skills in daily life. China and Japan are the only **long haul markets** in the top 10, ranked third and eighth respectively.

# Top source markets: spend

Spend by those who took an English language course (2018). Results are indicative due to low base size.



Rank	UK Rank*	Market	Spend in 2018
1	2	China	£224m
2	13	Japan	£139m
3	30	South Korea**	£81m
4	14	Saudi Arabia	£52m
5	6	Spain	£44m
6	9	Italy	£43m
7	4	France	£41m

We have just shown the top seven markets here as low base sizes affect the robustness of spend data more than visits data and these results are indicative only, especially for South Korea. Nonetheless, the higher spend per visit of long haul markets is reflected in their higher places in the rankings, with China ranking first globally. Spain, Italy and France are the only **European markets** ranked near the top for visitor spending.

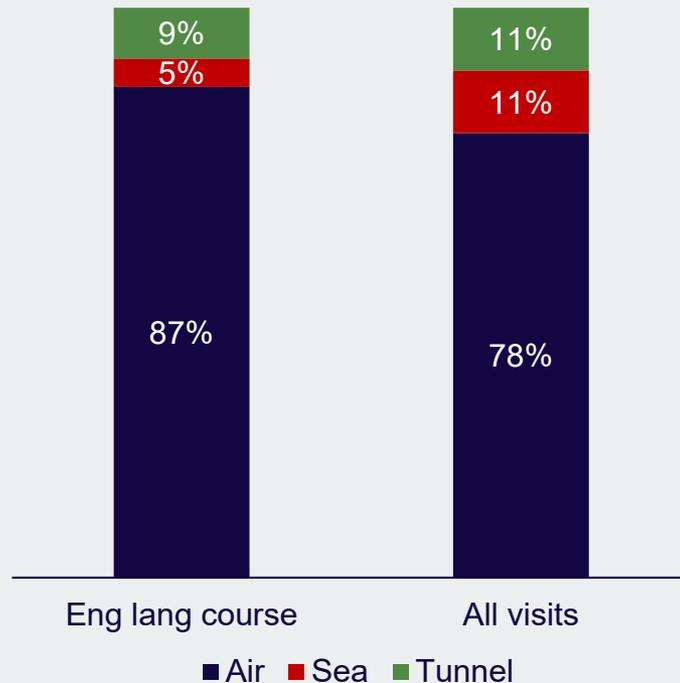
*\*shows this market's rank for total spend in the UK in 2018. \*\*low base size – treat results with caution.  
Base: all answered (18,447)*

# Visit trends



# Modes of travel

Proportion of visitors departing by each mode of transport (2018)



The modes of transport used by visitors who took an English language course to exit the UK (which is a strong indicator of how they arrived), display a slightly different pattern when compared to the average traveller.

**Air** is by far the most popular mode of transport across both groups; however, it is 8 percentage points more prominent for those who took an English language course.

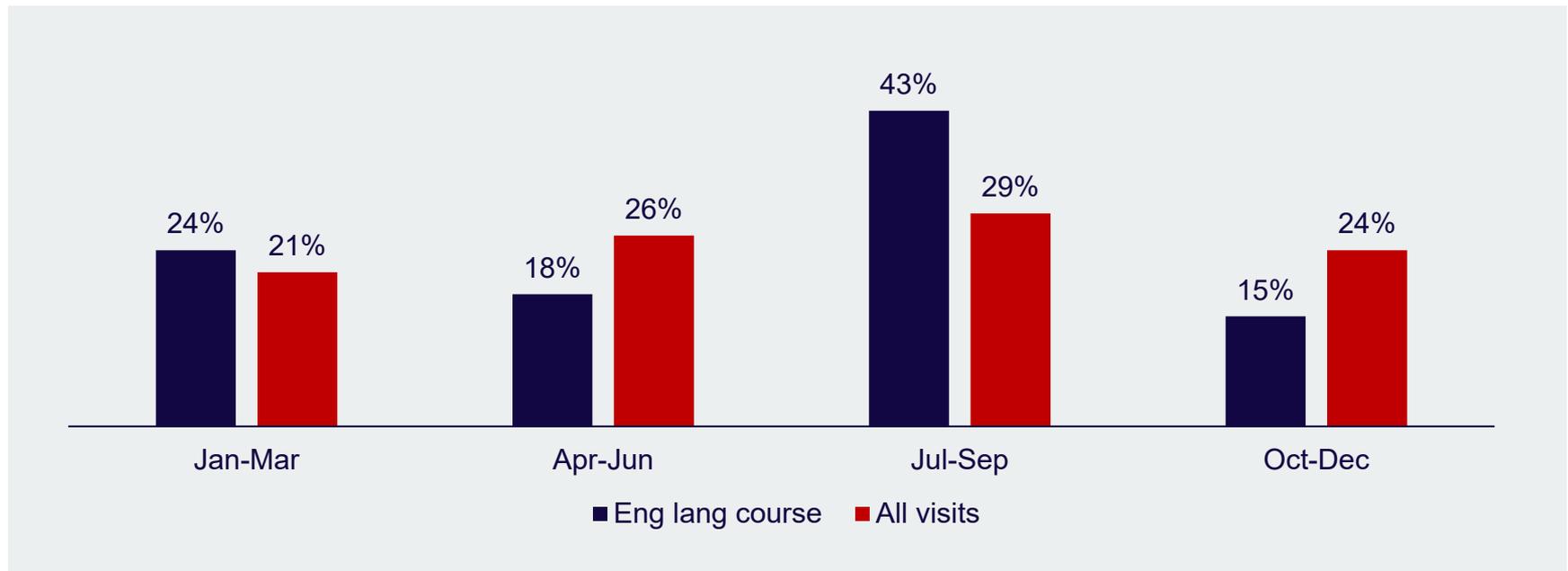
In contrast, **sea travel** is less than half as common for those who took an English language course (5% vs. 11% among all visitors).

Travel by **tunnel** is similarly prominent across both groups.

# Visits by season

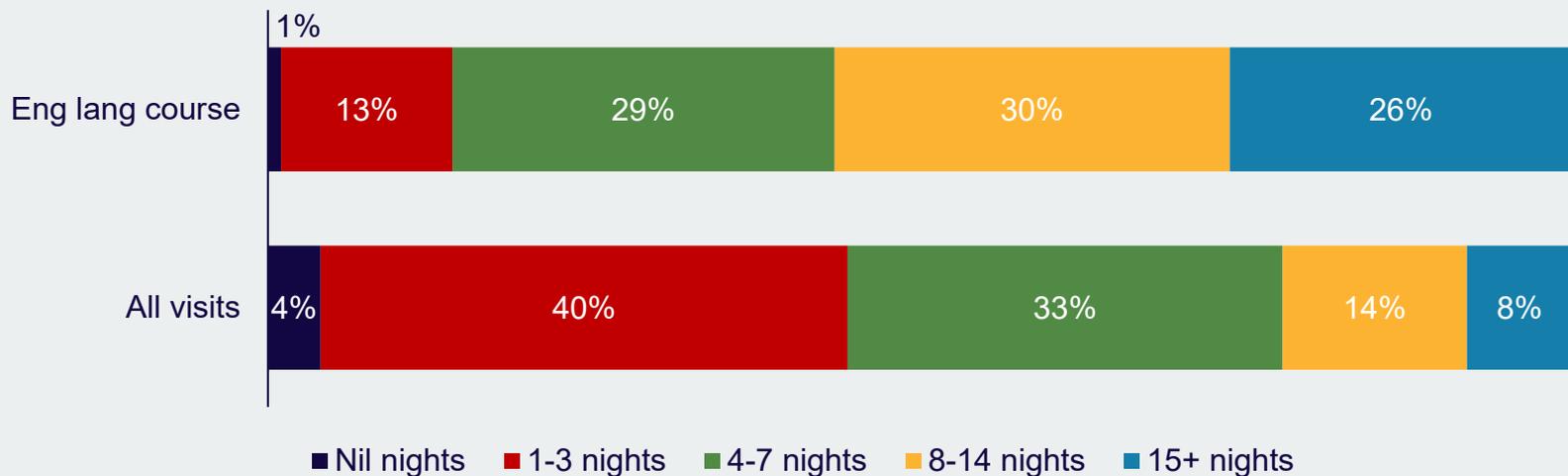
UK visitors who took an English language course in 2018 were significantly **more likely to visit during summer** than the average visitor (43% and 29% respectively visiting in July-September). In contrast, they are significantly less likely to visit in **spring** and **autumn** (8 percentage points lower, and 9 percentage points lower, respectively). Likelihood to visit in **winter** is similar across both groups.

## Visits by quarter (2018)



# Duration of stay

Reported duration of stay for visitors who took an English language course (2018)



As seen earlier in this report, visitors who took an English language course during their visit to the UK are **highly likely to stay longer** than the average visitor. The most common visit duration for this group in 2018 was 8-14 nights, closely followed by 4-7 nights, compared to the 1-3 nights most commonly seen for other travellers. Also, over **1 in 2 visitors** who took an English language course stayed for **more than 7 nights**.

# Spread of visits per region

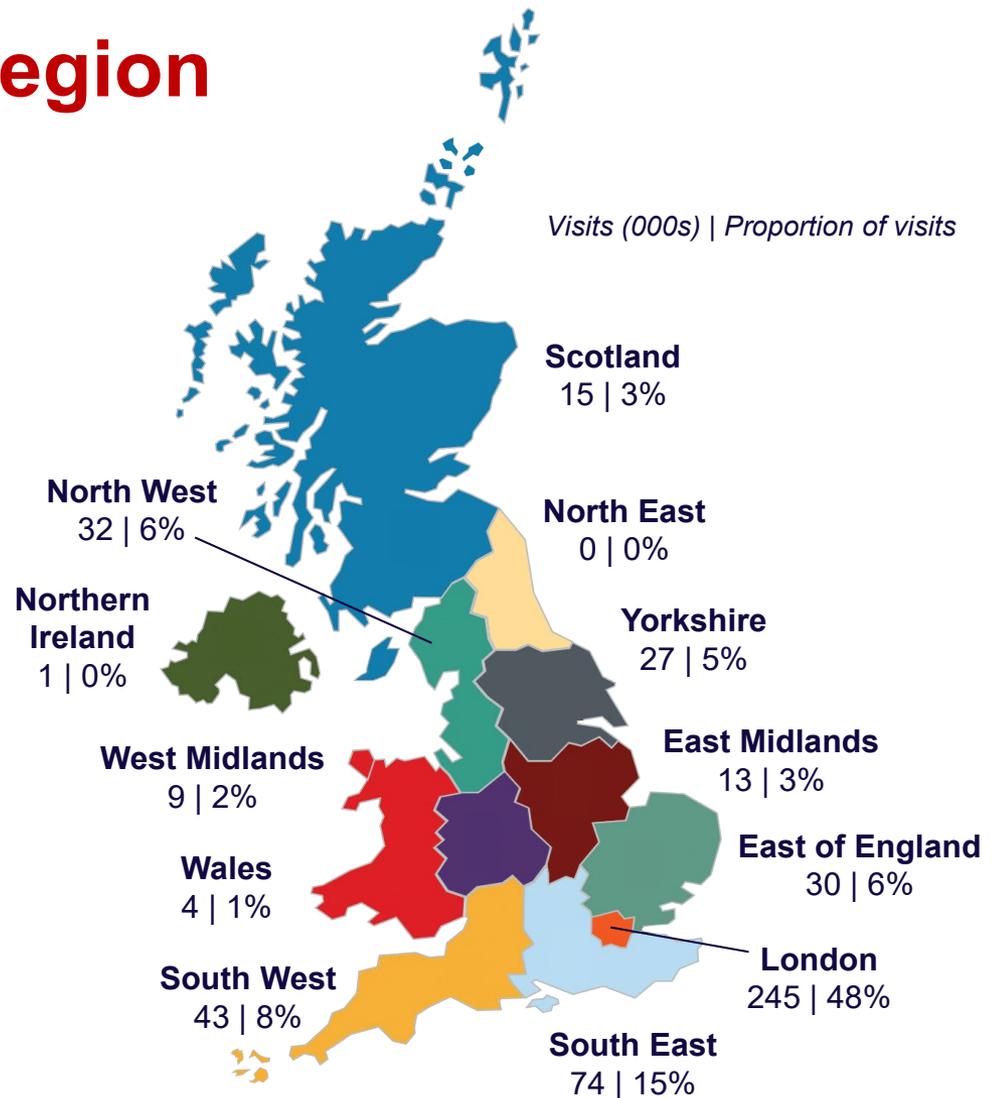
## Visits by region (2018)

Visitors who took an English language course during their stay in the UK are **more likely** to visit the **South East** (15% vs. 10%), **South West** (8% vs. 4%) and the **East of England** (6% vs. 4%) than the average visitor.

This may be linked to the availability of English teaching institutions in these regions.

They are **less likely** than the average traveller to visit **London** (48% vs. 52%) and **Scotland** (3% vs. 8%).

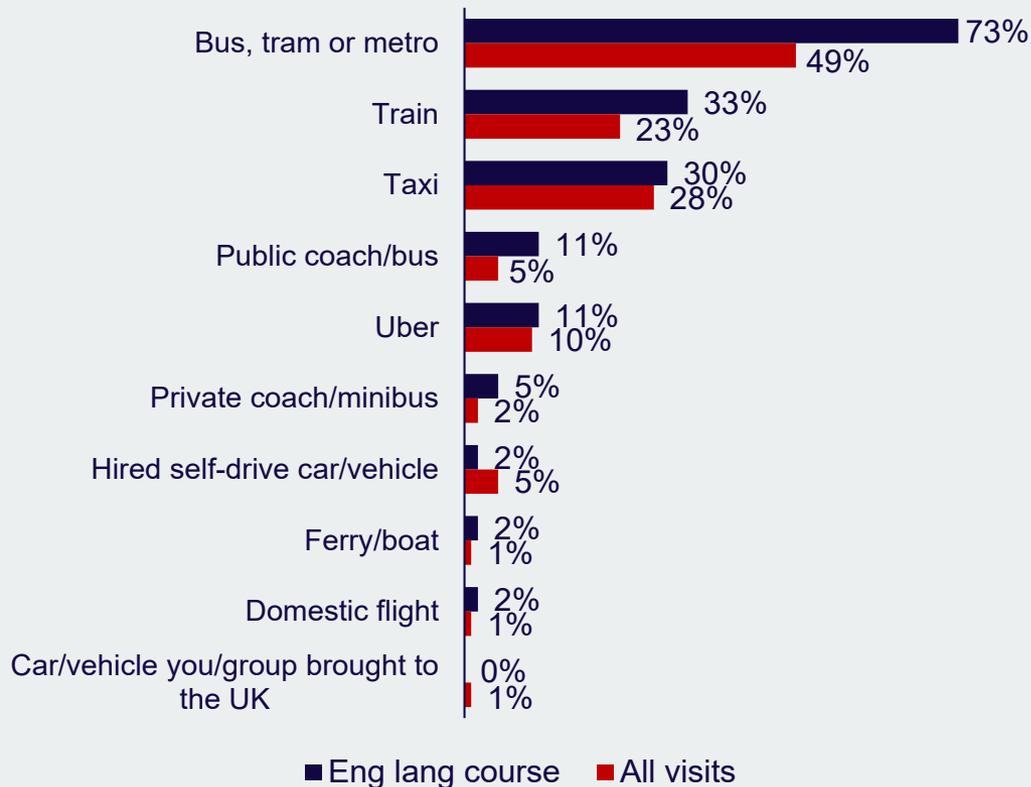
For regions with lower visit numbers, sample size is also small so results are indicative.



*Regional data here refers to visits where the visitor stayed in one area/region/nation only so that we know we can attribute the visit to a specific reason; numbers are therefore under-counting the true total. A total of zero shown here might be a reflection of low sample size rather than literally zero visitors. 3% of respondents provided an unspecified region. Base: Scotland (1,532), North East (217), Yorkshire (729), East Midlands (470), East of England (795), London (12,233), South East (2,591), South West (1,510), Wales (532), West Midlands (991), Northern Ireland (100), North West (1,809)*

# Internal modes of transport

Transport used by visitors while travelling within the UK (2018)



Patterns of transport used within the UK are quite different when comparing those who took an English course and the average visitor. This group are more likely to use every form of transport apart from **hired self-drive car/vehicles**, perhaps suggesting a high level of mobility during their stay. They are also 24 percentage points more likely to use the **bus, tram or metro**, which means that they may have an affinity with public transport.

# Summary and conclusions



# What can we learn about visitors who take an English language course?

- In 2018, **614,000** visitors to the UK took an English language course during their stay. They were the source of **3.5%** of visitor spend that year, and **4.1%** of nights spent in the UK. Over 2 in 5 visitors coming to the UK to **study** take an English language course.
- This group is particularly valuable for UK inbound tourism due to the fact that they stay for almost **three times more nights** than the average visitor. Over one in four of these visitors stay for more than 15 nights. This in turn means that their overall spend per visit is **over twice** that of other travellers.
- They also demonstrate other unique characteristics when it comes to demographic profile, and behaviour during their visit:
  - Visitors who take an English language course are **younger than other visitors**, with almost 7 in 10 being aged under 35. They are highly likely to come from **European markets**. Key long haul markets include China and Japan.
  - Visits from this group are **more highly seasonal** than other travellers, with 43% visiting in the summer months, and only 15% visiting during autumn.
  - Their visits are also more likely to be **concentrated** in the South East, South West and East of England, and they have a lower propensity to travel beyond England into the UK's other nations. They are more likely to use **all forms of transport** during their stay than the average visitor, apart from hired self-drive vehicle.
- This group is a **key target for UK tourism** due to the value of their visits, the opportunity to encourage repeat visits to the UK for young travellers, and the English Language Training industry's contribution to the UK economy.



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