

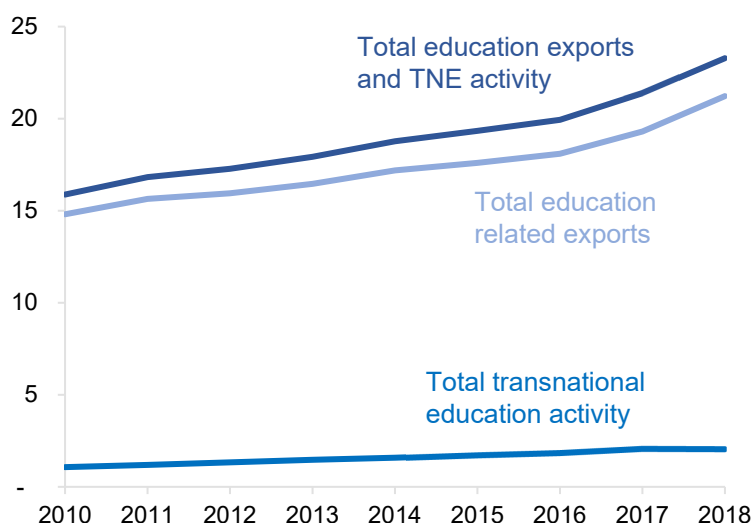


UK revenue from education related exports and transnational education activity in 2018

17 December 2020

UK revenue from education related exports and TNE activity increased to £23.3 billion in 2018, an increase of 8.9% since 2017 and 46.7% since 2010.

UK revenue from education related exports and transnational education (TNE) activities (£billions and current prices)

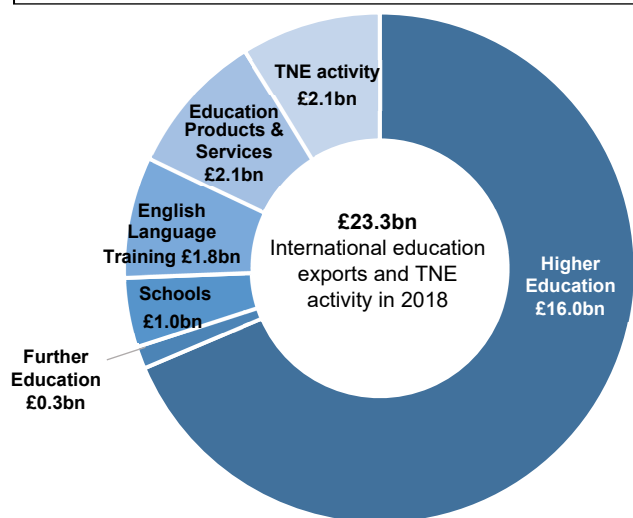


Total education exports and transnational education (TNE¹) activity was estimated to be £23.3 billion in 2018, an increase of 8.9% since 2017 in current prices. Since 2010, the estimated value of education related exports and TNE activity has risen by 46.7% in current prices.

Total education related exports were estimated to be £21.2 billion in 2018, and have increased by 43.3% since 2010. TNE activity was estimated to be £2.1 billion in 2018 and has grown by 92.3% since 2010, albeit from a lower base.

Higher Education accounts for 69% of the total revenue of education related exports and TNE activity.

UK revenue from education exports and TNE activity, 2018²



Higher Education accounts for the largest share of revenue from education related exports and TNE activity. Higher Education Institutions contributed £16.0 billion (69%) of the total value. The revenue from other stages of education such as Further Education and Schools is comparably smaller at £0.3 billion and £1.0 billion, respectively.

¹ TNE – education programmes delivered ‘offshore’ either through partner institutions or directly through distance learning or international branch campuses

² Totals will not necessarily equal the sum of the parts due to rounding

Contents

1.	UK revenue from education related exports and transnational education (TNE) activity (Tables 1 & 2)	4
2.	Share of education related exports and TNE by value of revenue stream (Tables 3 & 4)	6
3.	Accompanying tables	9
4.	Further information	10
5.	Technical information	10
6.	Get in touch	10

About this release

This statistical first release contains the latest estimates of education related exports and transnational education activity, for the calendar year 2018. The publication draws on previous years data, which has been published [here](#), to provide a picture of the trends over time. These estimates attach a monetary value to education related exports and TNE activity to understand the contribution made to the UK economy.

This SFR presents information on:

- The total contribution from education related exports and transnational education activity (TNE) to the UK economy from 2010 through to 2018
- The proportionate change in education related exports and TNE activity in 2018 compared to 2017
- The revenue streams comprising education related exports and TNE activity
- The proportionate share of revenue streams comprising education related exports and TNE activity
- The income from EU and non-EU students in terms of tuition fees and living expenditure

Technical document

Further detail on the methodology used to calculate education related exports and TNE activity can be found [here](#).

Office of National Statistics (ONS), Pink Book

Readers should note that the export estimates in this publication are based on an experimental methodology designed to accurately estimate, using the latest available evidence and data, the different aspects of the UK's trade in education related goods and services. This includes capturing both direct expenditure and the associated expenditure that occurs where an international student visits the UK to consume those goods and services. As the methodology has been developed specifically for this purpose, the estimates are not necessarily directly comparable with goods and services breakdowns contained in ONS' Pink Book ([here](#)) estimates, which measure the balance of payments for the UK.

In this publication

The following tables are included in the SFR:

- UK revenue from education related exports and repatriated income from transnational education activities
- Breakdown by source of revenue

The accompanying technical document provides information on the methodology used in producing this data and the quality and coverage of data sources. Data tables can be found in the accompanying Excel document.

These measures are intended to quantify the value of education related exports and transnational education activity to the UK economy.

Experimental statistics

These estimates are experimental statistics since they are still to be fully developed and rigorously tested to ensure they meet the required standard for national statistics. This is because the data used to compile these estimates come from multiple sources, some with varying quality or limited coverage.

As improvements are best made by publishing the data and opening up the discussion with data users, we would welcome feedback on the usefulness of the statistics and on the methodology we have used to produce them. We would also welcome ideas for appropriate data sources which could be used to assess the value of exports in these areas and suggestions on additional areas, outside of those already identified, which might contribute to the overall value of education-related exports.

Feedback

We are changing how our releases look and welcome feedback on any aspect of this document at rebecca.morgan@education.gov.uk

1. UK revenue from education related exports and transnational education (TNE) activity (Table 1 & 2)

Figure 1 shows the increase in education related exports and TNE activity to £23.3 billion (current prices) in 2018. The value of education related exports and TNE activity has grown steadily since 2010. The overall value has increased by 46.7% or £7.4 billion in current prices since 2010. Education related exports account for £6.4 billion of the £7.4 billion increase and TNE accounts for £1.0 billion of the increase.

Since 2010, total education related exports have grown by 43.3% in current prices. TNE activity has grown at a significantly faster rate of 92.3% over the same period. However, this growth has occurred from a lower base.

Figure 1: UK revenue from education related exports and transnational education (TNE) activities (£billions and current prices)

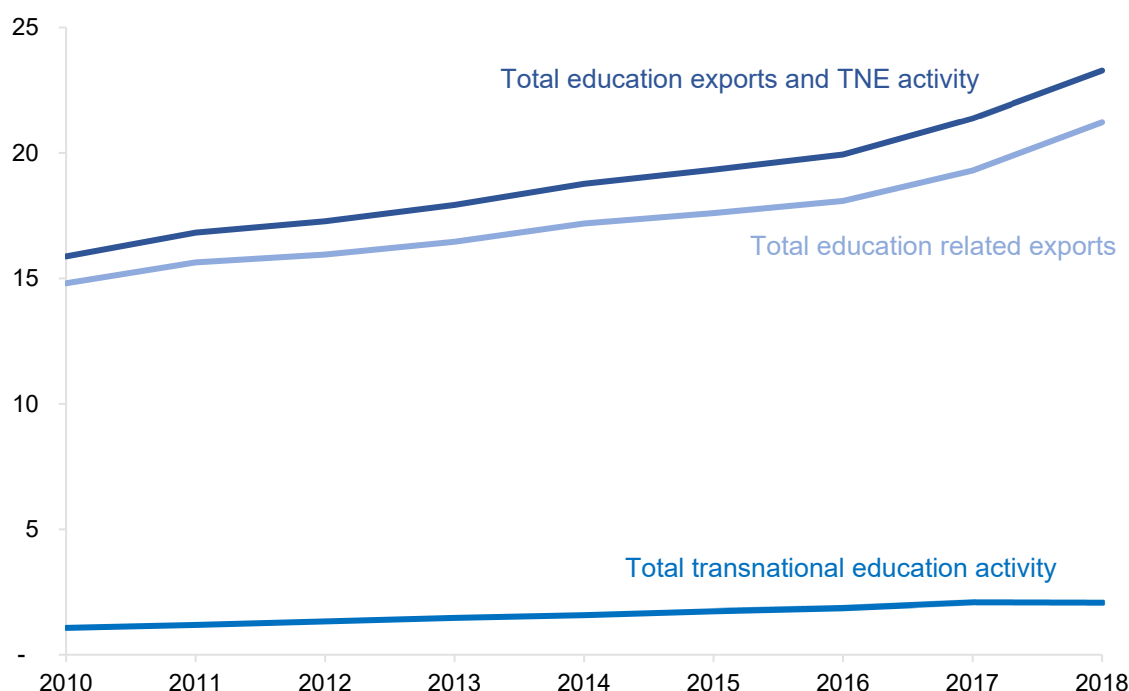


Table 1 shows the annual rate of change in estimates of education related exports since 2010. Between 2017 and 2018 total education exports and TNE activity grew by 8.9%, 1.7 percentage points higher than the rate of growth seen between 2016 and 2017. This reflects the higher growth rate in total education related exports which grew at 10.0% between 2017 and 2018, compared to 6.7% in the previous year.

Table 1: Annual percentage change in education related exports and TNE activity

	% change 2010 to 2011	% change 2011 to 2012	% change 2012 to 2013	% change 2013 to 2014	% change 2014 to 2015	% change 2015 to 2016	% change 2016 to 2017	% change 2017 to 2018
Total education related exports	5.6	2.0	3.2	4.4	2.4	2.8	6.7	10.0
Total transnational education activity	10.9	11.8	10.7	7.5	9.6	6.9	12.3	-0.8
Total education exports and TNE activity	6.0	2.7	3.8	4.7	3.0	3.1	7.2	8.9

Table 2. Percentage change between 2010 and 2018 in revenue streams of education related exports and transnational education activity

£million current prices to nearest £10 million,
calendar years

	2010	2018	Change 2010-2018	% Change 2010-2018
Higher Education - HEIs				
Non-EU students				
Fee income	2,700	5,450	+2,746	+102%
Living expenditure	3,860	5,470	+1,602	+41%
(Scholarships awarded)	(40)	80	+42	+101%
EU students				
Fee income	350	1,150	+797	+228%
Living expenditure	1,580	2,160	+576	+36%
Incoming Erasmus students (living expenditure)	260	440	+184	+71%
(Cost to Govt of tuition fee loans)	(50)	370	+321	+665%
Other				
Research and other contracts	760	1,500	+740	+97%
Other (e.g. IP income)	100	270	+166	+163%
Total	9,530	15,970	+6,447	+68%
Further Education (Non-EU only)				
Fee Income	230	100	-130	-56%
Living costs	650	180	-467	-72%
Other income	40	40	+6	+15%
Total	920	330	-591	-64%
Independent schools	630	1,020	+396	+63%
English Language Training	2,230	1,790	-441	-20%
Education Products and Services				
Qualification awarding bodies	140	320	+175	+123%
Education-related publishing	870	950	+77	+9%
Education-related equipment	480	850	+362	+75%
Education-related broadcasting	10	10	-7	-53%
Total	1,510	2,110	+607	+40%
TOTAL EDUCATION RELATED EXPORTS	14,810	21,220	+6,418	+43%
Transnational Education				
Higher Education	350	650	+300	+85%
Further Education	30	30	+4	+16%
Schools	610	1,260	+646	+106%
English Language Training	80	120	+38	+47%
TOTAL TRANSNATIONAL EDUCATION ACTIVITY	1,070	2,060	+989	+92%
TOTAL EDUCATION EXPORTS AND TNE ACTIVITY	15,880	23,280	+7,407	+47%

Totals will not necessarily equal the sum of the parts due to rounding
Figures in brackets are subtracted

2. Share of education related exports and TNE by value of revenue stream (Tables 3 & 4)

Figure 2: Share by revenue stream of education related exports and repatriated income from transnational education activities, 2018 (£billions in current prices)

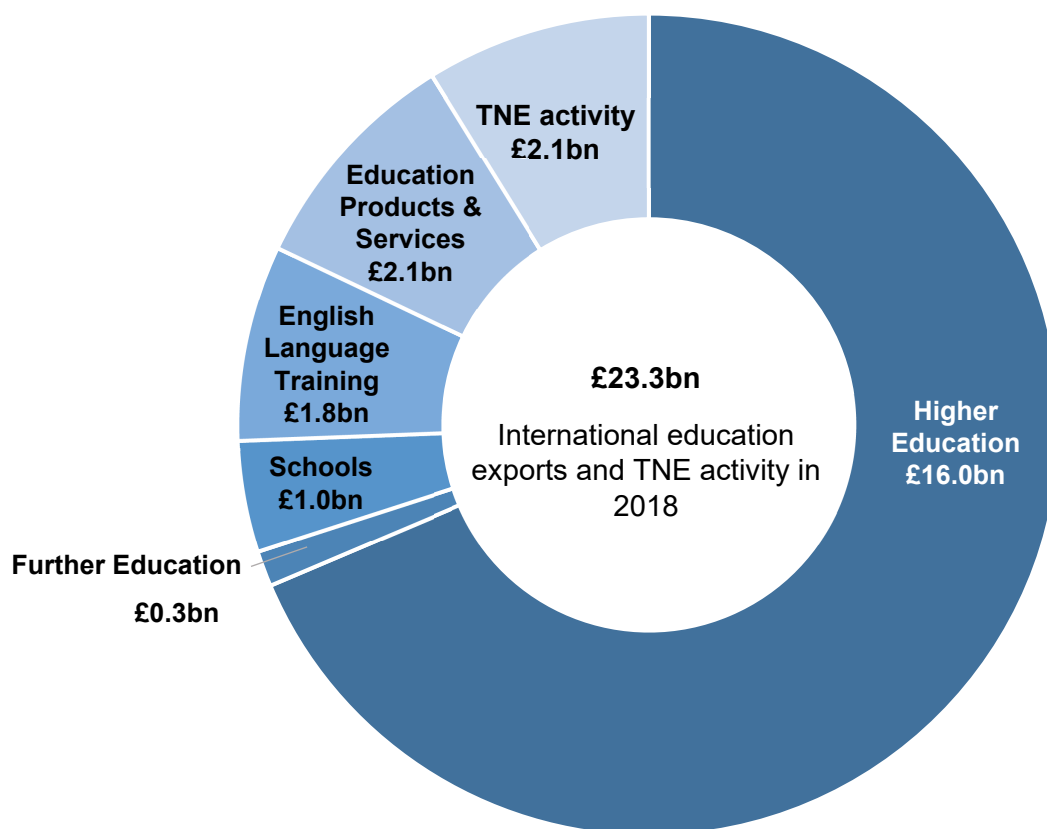


Figure 2 shows the composition of revenue streams in total education related exports and TNE activity in 2018. Higher education was the main contributor with £16.0 billion of export revenue. In comparison, Further Education, which consists of non-EU students only, accounted for £0.3 billion (see methodology for further information on how this is calculated). The income generated from Education Products and Services and TNE activity is broadly similar. English Language Training and Independent Schools generated £1.8 billion and £1.0 billion, respectively.

Table 3 sets out the components of each revenue stream between 2010 and 2018. It shows that, in 2018, EU and non-EU Higher Education students at UK universities generated an estimated £14.2 billion² in exports through living expenditure and tuition fees, which accounts for around 61% of the total value of education exports and TNE activity.

² EU and non-EU students generated £3.4 billion and £10.8 billion respectively, minus the cost of scholarships awarded and cost to Government of tuition fee loans.

Table 3. UK revenue from education related exports and transnational education activity

	£million current prices to nearest £10 million, calendar years									
	2010	2011	2012	2013	2014	2015	2016	2017	2018	
Higher Education - HEIs										
Non-EU students										
Fee income	2,700	3,040	3,340	3,650	4,000	4,300	4,530	4,840	5,450	
Living expenditure	3,860	4,140	4,270	4,380	4,550	4,600	4,670	4,910	5,470	
(Scholarships awarded)	(40)	(40)	(40)	(40)	(40)	(50)	(60)	(60)	(80)	
EU students										
Fee income	350	380	430	530	630	700	840	1,050	1,150	
Living expenditure	1,580	1,680	1,710	1,680	1,700	1,730	1,820	1,980	2,160	
Incoming Erasmus students (living expenditure)	260	280	310	330	340	380	390	420	440	
(Cost to Govt of tuition fee loans)	(50)	(50)	(60)	(80)	(100)	(150)	(260)	(330)	(370)	
Other										
Research and other contracts	760	840	970	1,100	1,190	1,250	1,310	1,390	1,500	
Other (e.g. IP income)	100	110	120	140	170	190	210	230	270	
Total	9,530	10,390	11,040	11,690	12,440	12,940	13,440	14,420	15,970	
Further Education (Non-EU only)										
Fee Income	230	260	160	130	110	90	90	90	100	
Living costs	650	720	450	260	210	190	170	170	180	
Other income	40	40	40	40	40	40	40	40	40	
Total	920	1,020	650	420	360	320	300	310	330	
Independent schools	630	700	760	760	800	900	930	970	1,020	
English Language Training	2,230	2,000	1,890	1,860	1,820	1,650	1,550	1,570	1,790	
Education Products and Services										
Qualification awarding bodies	140	160	180	210	230	250	270	290	320	
Education-related publishing	870	860	860	940	940	920	950	1,020	950	
Education-related equipment	480	510	560	560	580	610	660	740	850	
Education-related broadcasting	10	10	20	20	20	10	10	10	10	
Total	1,510	1,540	1,610	1,730	1,770	1,790	1,880	2,050	2,110	
TOTAL EDUCATION RELATED EXPORTS	14,810	15,640	15,950	16,460	17,190	17,600	18,090	19,300	21,220	
Transnational Education										
Higher Education	350	400	470	510	550	580	610	640	650	
Further Education	30	30	30	30	30	30	30	30	30	
Schools	610	670	730	830	900	1,010	1,100	1,290	1,260	
English Language Training	80	90	90	100	100	100	110	120	120	
TOTAL TRANSNATIONAL EDUCATION ACTIVITY	1,070	1,190	1,330	1,470	1,580	1,730	1,850	2,080	2,060	
TOTAL EDUCATION EXPORTS AND TNE ACTIVITY	15,880	16,830	17,280	17,930	18,770	19,330	19,940	21,380	23,280	

Totals will not necessarily equal the sum of the parts due to rounding

Figures in brackets are subtracted

Over the period 2010 to 2018 the share of Higher Education to the total value of education related exports and TNE activity has increased by 9 percentage points from 60% to 69%. TNE activity has increased by 2 percentages point over the same period from 7% to 9% (Table 4).

The share of English Language Training and Further Education (non-EU students) have both fallen by 6 and 5 percentage points, respectively; the ELT share dropping from 14% to 8% and the Further Education share dropping from 6% to 1%.

Table 4. Share by revenue stream of total education related exports and transnational education activity from 2010 to 2018

	% share of total education exports and TNE activity								
	2010	2011	2012	2013	2014	2015	2016	2017	2018
Higher Education - HEIs	60%	62%	64%	65%	66%	67%	67%	67%	69%
Further Education (Non-EU only)	6%	6%	4%	2%	2%	2%	2%	1%	1%
Independent schools	4%	4%	4%	4%	4%	5%	5%	5%	4%
English Language Training	14%	12%	11%	10%	10%	9%	8%	7%	8%
Education Products and Services	9%	9%	9%	10%	9%	9%	9%	10%	9%
Transnational Education	7%	7%	8%	8%	8%	9%	9%	10%	9%
Total value education exports and transnational education activity	100%	100%	100%	100%	100%	100%	100%	100%	100%
	£15.88 bn	£16.83 bn	£17.28 bn	£17.93 bn	£18.77 bn	£19.33 bn	£19.94 bn	£21.38 bn	£23.28 bn

Totals will not necessarily equal the sum of the parts due to rounding

3. Accompanying tables

The following tables are available in Excel format on the department's statistics website [here](#):

National tables

Table 1

Annual percentage change in education related exports and TNE activity

Table 2

Percentage change between 2010 and 2018 in revenue streams of education related exports and transnational education activity

Table 3

UK revenue from education related exports and transnational education activity, 2010 – 2018

Table 4

Share of total education related exports and transnational education activity by revenue stream from 2010 to 2018

When reviewing the tables, please note that:

- The percentage change in table 4 shows the market share of each component of education related exports and transnational education activity, the percentages for each year sum to 100%. In contrast table 2 shows the percentage change in 2018 compared to 2010, showing how the different components have grown or declined in this period.

4. Further information

- A detailed technical note is published alongside this publication
- Previously published figures for 2010 to 2014 are available [here](#)
- Figures for 2015 were first published [here](#).
- Figures for 2016 were first published [here](#).
- Figures for 2017 were first published [here](#).

5. Technical information

A quality and methodology information document accompanies this SFR. This provides further information on the data sources, their coverage and quality and explains the methodology used in producing the data, including how it is validated and processed.

6. Get in touch

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