

Value of UK Skills Sector Exports



Technical Report

For the British Council and the UK Skills Partnership

THE RESEARCH  BASE

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1. Introduction

The challenges of estimating the size of and value to the UK of skills sector exports are manifold. Identifying the scale, scope and value of exports in the sector is difficult due to the sector's diversity and lack of standardised mechanisms for collecting and collating such data. The disadvantage this presents to the sector at large is significant, placing it at a comparative disadvantage to other areas of education and limiting the ability to articulate sector value and international potential to the UK Government and skills suppliers.

In order to counter this challenge the British Council, on behalf of the UK Skills Partnership (UKSP), commissioned The Research Base to conduct this study to calculate an estimate of the value of UK skills sector exports. This report presents the findings of this research, representing a first attempt to value the exports of the UK skills sector. Data in this area is, as noted above, poor, and response rates from the sector have been low. These limitations mean that the model and resulting figures have significant caveats and assumptions that need testing. They suggest that the sector needs to collect better and more systematic data. An accurate portrait of the sector's value would better allow for its promotion, and it is hoped that the findings presented in this report can act as a starting point for future data collection rounds, with stakeholders coming together to refine the methodology and the data that sits behind it.

This report outlines the detailed approach used to estimate the value of the skills sector to UK exports. The accompanying summary report gives a more concise overview of the estimated value and makes some brief recommendations for the sector.

2. Method

2.1 Research Approach

There were several distinct, iterative phases to the research approach, which was designed to be as collaborative as possible. First was inception, which encompassed a consultative design process including an inception workshop with the UKSP working group. This was followed by an initial review of relevant data and documentation, allowing for collation and assessment of the approaches, methods and results of previous attempts to estimate the value of the sector. These informed the development of a model to guide the calculations, which in turn informed the design of a survey, developed to address the gaps in the available data.

An interim report was submitted to UKSP for expert review and feedback on the findings thus far, along with the calculations and proposed approach. Once approved, the survey was piloted and then disseminated through the working group to key stakeholders across the sector. Initial analysis of responses informed a supplementary data review, which together provided the data for the final analysis and calculation of the estimate for the sector, culminating in this report.

2.2 Sector Survey

The survey was based on an initial draft from UKSP, designed to address the gaps in the available data and respond to the requirements of the model. As an objective of the survey was to collect organisational financial data, and with consideration of protecting the competitive interests of participants, anonymity was guaranteed. This was highlighted in communications supporting the dissemination of the survey as well as throughout the survey itself.

The survey was piloted with the working group and a small range of stakeholders before its launch in December 2021. It was hosted on SurveyMonkey and disseminated by the UKSP working group, and

remained live until mid-January 2022. Please see Appendix I for the full survey, including response options.

Survey data was cleaned to remove blank, unusable and duplicate responses. For a small number of responses where an organisation name was not provided, IP address data was used to identify unique returns. For organisations that had provided more than one response, the most complete response was retained. This led to a total of 70 usable survey responses out of 134 in total. Summary demographic data from the useable responses can be found in Appendix 3.

Once initial cleaning was complete, organisation names were decoupled from the remaining response data to ensure confidentiality. The dataset was also recoded where required, for example in questions that required participants to select their income bracket from a series of financial bands. Each band was recoded to the midpoint of that particular response option to allow for consistent analysis of the financial data.¹ A breakdown of the figures used for recoding the bands can be found in Appendix 2.

Once the data was fully cleaned and recoded, cross-cutting and indicator specific calculations were performed. The full method for each set of calculations, including any specific limitations and considerations for each, can be found in section 2.3.

2.3 Model







| Indicator | Segment | Sources | Tier | Calculation |
|---|---|---|------|--|
| 1. International regulated qualifications | Awarding Organisations | <ul style="list-style-type: none"> AQMR Qualification value question to FAB members | 1 | England: [International skill-related certifications]*[average certification price] Scotland, Wales, Northern Ireland: [Population as a proportion of England's]*[Total number of English certifications awarded] |
| 2. International unregulated qualification/certifications | Awarding Organisations, Colleges, Professional Bodies | <ul style="list-style-type: none"> Sector survey National institution numbers | 3 | [[Average international turnover per organisation]*[Average proportion of international turnover for indicator]]*[total UK sector] |
| 3. UK-bound student fee income | Colleges | <ul style="list-style-type: none"> Sector Survey | 3 | [average course fees for UK-bound international students] * [average number of UK-bound international students at individual colleges] * [total college numbers] |

¹ For bands with no endpoint, appropriate figures were agreed with the working group.


| Indicator | Segment | Sources | Tier | Calculation |
|-------------------------------------|--|--|------|--|
| 4. UK-bound student expenditure | Colleges | <ul style="list-style-type: none"> Student income and expenditure survey | 2/3 | $[\text{total UK-bound college students}] * [\text{average student expenditure}] - [\text{average student participation costs}]$ <p>* calculated as per indicator 3</p> |
| 5. International student fee income | Awarding Organisations, Colleges, Professional Bodies, Sector Bodies | <ul style="list-style-type: none"> Sector survey National institution numbers | 3 | $[\text{segmented data on fee income from students overseas}] / [\text{number of institutional survey participants by segment}] * [\text{segmented national institution numbers}]$ |
| 6. Consultancy by providers/ABs | Awarding Organisations, Colleges, Professional Bodies, Sector Bodies | <ul style="list-style-type: none"> Sector survey National institution numbers | 3 | $[\text{segmented data on 'other/consultancy' income}] / [\text{number of institutional survey participants by segment}] * [\text{segmented national institution numbers}]$ |
| 7. Consultancy by consultants | EXCLUDED DUE TO LACK OF DATA | | | |
| 8. Chartered/Institute memberships | Professional bodies | <ul style="list-style-type: none"> Approved professional organisations and learned societies listings (gov.uk) Professional body websites (sample) | | $[[\text{Sampled international member numbers}] * [\text{sampled membership fees}]] / [\text{number of sampled institutions}] * [\text{total number of institutions}] * 0.2$ |

| Indicator | Segment | Sources | Tier | Calculation |
|---|---|--|------|--|
| 9. Skills-related supplies, inc EdTech | Education publishing and supply firms (focus on skills portion of activity), Awarding Organisations, Colleges | <ul style="list-style-type: none"> DfE data on education exports (via original BESA and PA data) HE workforce data (HESA) FE college workforce data (AOC) School workforce data (gov.uk) Early years workforce data (DfE) | 2 | $[[education-related publishing exports] + [education-related equipment exports]] * 0.06 - EXCLUDED$ $[segmented data on skills-related supply income] / [number of institutional survey participants by segment] * [segmented national institution numbers]$ |
| 10. Training of English Language Teacher Trainers | Colleges | <ul style="list-style-type: none"> Sector survey National institution numbers | 3 | $[segmented data on training of ELTT income] / [number of institutional survey participants by segment] * [segmented national institution numbers]$ |

2.4 Limitations and Considerations

-  **Survey response rates.** Low response rates across all segments means that the survey sample is highly unlikely to be representative of the broader sector. A lack of usable survey responses meant that some segments had to be excluded from this research, with indicators adjusted or excluded as necessary. Notably, insufficient data for independent training providers has led to a significant gap in estimates across multiple indicators. Consultancy firms, equipment providers and recruitment organisations also had to be excluded due to low response rates. The impacts of these exclusions are discussed in the method for each individual indicator.
-  **Financial bands.** It was decided, after consultation with the working group, that financial information would be collected in bands in order to make financial data less sensitive for organisations to share. Associated calculations are less precise than if exact figures were provided. More information about how these bands were recoded for analysis can be found above, in the method section of this report.
-  **Availability of data.** Given the extremely low number of data points available, a high-level approach to the analysis was undertaken to avoid results that may be misleading due to over-precision. Segmentation between UK nations was not possible in most cases. A more nuanced approach will likely be possible in any future iterations of this research should more robust participant data be available.
-  **Datasets for international turnover.** Low response rates also led to a generally small datasets for each aspect of international turnover. It is feasible that certain international activity may not be logged for particular types of organisations because of these low response rates.
-  **Weighting.** Demographic sector data was not available to support weighting. It is recommended that demographic information on measures such as turnover and number of employees is collected by the relevant representative/membership bodies and collated by UKSP to support process improvements in future years.
-  **Annual changes.** Extreme caution should be taken when interpreting any reported change in values

between 2020/2021 and 2018/2019. Extrapolating a very low number of data points up to represent the entire sector means the figures are very sensitive to any changes reported by those participants. Although measures have been taken to correct for this (specifically by weighting any outliers where the change between the two years was more than 50%), it is highly likely that in some areas, change between the two years may be less extreme than this research suggests.

 **Rounding.** It should be noted that, due to rounding, underlying calculations may not exactly match those displayed in report tables.

3. Cross-Cutting Calculations

A number of calculations related to the average international turnover of different organisation types were common across multiple indicators. For each organisation type, the average turnover of those that reported that they export skills-related products and services was calculated. This in turn was multiplied by the average reported proportion of that turnover that derived from international activity to give an average international turnover figure for each exporting institution. This figure was then used as the basis for calculating the export figures for the different dimensions of international exporting across multiple model indicators.

The total number of UK institutions in each segment was also collected to allow extrapolation of the results to a national level.

3.1 Awarding Organisations

Number of Awarding Organisations

The number of awarding organisations identified for this research was 205.² As historic figures were not available, this number has been used for both the 2020/2021 and 2018/2019 calculations.

Average International Turnover

17 awarding organisations provided usable survey responses that allowed us to calculate the average international turnover for awarding organisations that export skills-related products and services. The relatively low response rate and the likely propensity of exporting awarding organisations to self-select in engaging in the survey, however, meant that the proportion of participants who reported they exported was extremely high in both years; it was felt that this was likely be unrepresentative of the wider sector so DIT's mailing list of skills-exporting organisations was used as a proxy measure.³

In 2020/2021 the average turnover of awarding organisations that exported was £11,812,500; around 38% of this turnover came from international activity, meaning the average international turnover per exporting awarding body was £4,487,906.

² Figure provided by The Federation of Awarding Bodies, sourced from Ofqual, Qualifications Wales and Scottish Qualifications Authority.

³ The number of awarding organisations signed up to DIT's skills export mailing list was uplifted by 1/3 of the difference between the number of awarding organisations on the mailing list and the total number of 205. 1/3 was chosen as the difference between the two numbers was 45, giving an uplift of 15 - this was felt to be a feasible figure in light of the lack of alternative data. This deviates from the methodology used by other cross-cutting calculations that also use DIT's mailing list as a proxy. In this instance, using the same methodology would have resulted in a proportion greater than 100%.

In 2018/2019, the average turnover of awarding organisations that exported was £13,946,429 with around 40% of this coming from international activity. Therefore, the average international turnover for each exporting awarding body was £5,626,388.

Cross-Cutting Calculations: Awarding Organisations

| | 2020/2021 | 2018/2019 | Source |
|--|-------------|-------------|--|
| Number of awarding organisations | 205 | 205 | FAB; Ofqual, Qualifications Wales, SQA |
| Survey participants | 17 | 17 | UKSP survey |
| Proportion that export (%) | 85.0% | 85.0% | DIT mailing list |
| Average turnover of those that export | £11,812,500 | £13,946,429 | UKSP survey |
| Average turnover proportion from int. activity (%) | 38.0% | 40.3% | UKSP survey |
| Average international turnover per awarding body | £4,487,906 | £5,626,388 | Calculated |

3.2 Colleges

Number of Colleges

The number of colleges in the UK was sourced from Association of Colleges statistics. These note that in 2021, there were 187 colleges in England⁴ 26 colleges Scotland, 13 in Wales and six in Northern Ireland.⁵

For 2018/2019, the number of English colleges was slightly higher, at 200^{6/7}; the UK total figure was adjusted accordingly.

Average International Turnover

In 2020/2021 the average turnover of colleges that exported was £57,272,727 with 5.3% of this coming from international activity. Therefore, the average international turnover per exporting college was £3,058,884. We are aware that since this figure was derived from a relatively low number of survey responses, it may not be representative of the wider college sector; a larger volume of responses in further iterations of research would make this figure more robust. Similarly, as these are experimental statistics, UKSP would welcome any feedback or suggestions from the sector around any potential improvements to methodology in future years. This request for feedback applies to all indicators.

This is a lower figure than that reported for 2018/2019. Here, although the average turnover of those that

⁴ Comprised of 163 general further education colleges, 12 land-based colleges, 10 institutes of adult learning (formerly specialist designated colleges) and two art, design and performing arts colleges. 45 sixth form colleges are out of scope for this research and have been excluded.

⁵ <https://www.aoc.co.uk/about-colleges/research-and-stats/key-further-education-statistics>

⁶ 174 further education colleges, 14 land-based colleges, 10 specialist designated colleges and two art, design and performing arts colleges. 57 sixth form colleges are out of scope for this research and have been excluded.

⁷ <https://www.aoc.co.uk/sites/default/files/College%20Key%20Facts%202018-19.pdf>

export was similar to to 2020/2021 figure (£55,000,000), a higher proportion of that figure (8.1%) came from international activity, leading to an average international turnover for each exporting college of £4,480,000. This reduction in international exporting activity may possibly be attributed to factors such as Brexit and the COVID-19 pandemic.

Cross-Cutting Calculations: Colleges

| | 2020/2021 | 2018/2019 | Source |
|--|-------------|-------------|--|
| Number of colleges | 232 | 245 | AOC Key Further Education Statistics |
| Survey participants | 30 | 30 | UKSP survey |
| Proportion that export (%) | 60% | 60% | UKSP survey |
| Average turnover of those that export | £57,272,727 | £55,000,000 | UKSP survey |
| Average turnover proportion from int. activity (%) | 5.3% | 8.1% | UKSP survey |
| Average international turnover | £3,058,884 | £4,480,000 | Calculated |

3.3 Professional Bodies

Number of Professional Bodies

The number of professional awarding organisations listed in the Government's list of approved professional organisations and learned societies at the time of analysis was 2,968.⁸ As previous versions of this list were not available, this figure has been used for both the 2020/2021 and 2018/2019 calculations.

Average International Turnover

Eight professional bodies provided usable survey responses that allowed us to calculate the average international turnover for those that export. All of these professional bodies, however, reported that they exported skill-related products and services; it was felt that this was most likely not representative of the wider sector so DIT's mailing list of skills-exporting organisations was used as a proxy measure.⁹

In 2020/2021, the average turnover of professional bodies that reported exporting skills-related products and services was £16,468,750. Of this, 14.1% was attributable to international activity meaning the average international turnover for professionals bodies that export was £2,319,741.

This figure was similar in 2018/2019 - although the average turnover of those that exported was lower (£14,906,250), this was balanced by a slightly higher proportion of turnover coming from international activity (16.5%). Therefore, the average international turnover for exporting professional bodies was £2,465,494.

⁸ <https://www.gov.uk/government/publications/professional-bodies-approved-for-tax-relief-list-3/approved-professional-organisations-and-learned-societies>

⁹ The number of professional bodies signed up to DIT's skills export mailing list was uplifted by 30%; this was used to represent the number of professional bodies across the UK that export.

Cross-Cutting Calculations: Professional Bodies

| | 2020/2021 | 2018/2019 | Source |
|--|-------------|-------------|------------------|
| Number of professional bodies | 2,968 | 2,968 | gov.uk |
| Survey participants | 8 | 8 | UKSP survey |
| Proportion that export (%) | 1.6% | 1.6% | DIT mailing list |
| Average turnover of those that export | £16,468,750 | £14,906,250 | UKSP survey |
| Average turnover proportion from int. activity (%) | 14.1% | 16.5% | UKSP survey |
| Average international turnover | £2,319,741 | £2,465,494 | Calculated |

3.4 Sector Bodies

Number of Sector Bodies

There are currently 18 Sectors Skills Councils in the UK, along with five sector skills bodies.¹⁰ This total was used for both the 2020/2021 and 2018/2019 calculations.

Average International Turnover

Three sector bodies took part in the survey, all of whom reported that they export skills-related products and services. This figure was not adjusted, as it was thought reasonable to assume that sector bodies have turned to international income sources given a reduction in national public sector income in recent years. In addition, as there were no sector bodies included on the DIT skills export mailing list, proxy data was not available with which to calculate an alternative figure.

In 2020/2021, the average international turnover of each exporting sector body was £833,750, which represented 25% of the total sector body turnover. This was a reduction on the 2018/2019 figure where international activity accounted for around 35.1% of turnover, leading to an average international turnover of £1,227,975 for each sector body. Again, the reduction in the proportion of turnover attributable to international exporting activity between 2018/2019 and 2020/2021 may potentially be due to factors such as Brexit and the COVID-19 pandemic.

Cross-Cutting Calculations: Sector Bodies

| | 2020/2021 | 2018/2019 | Source |
|---------------------------------------|------------|------------|-------------|
| Number of sector bodies | 23 | 23 | Unionlearn |
| Survey participants | 3 | 3 | UKSP survey |
| Proportion that export (%) | 100.0% | 100.0% | UKSP survey |
| Average turnover of those that export | £3,333,333 | £3,500,000 | UKSP survey |

¹⁰ <https://www.unionlearn.org.uk/sector-skills-councils-sscs-and-industrial-partnerships>

| | 2020/2021 | 2018/2019 | Source |
|--|-----------|------------|-------------|
| Average turnover proportion from int. activity (%) | 25.0% | 35.1% | UKSP survey |
| Average international turnover | £833,750 | £1,227,975 | Calculated |

4. Indicators

Indicator 1: International Regulated Qualifications

Estimated Value | £1,653,626,958

To ascertain the value of international regulated qualifications, data on the number of skills-related international awards was collated from Ofqual's Annual Qualifications Market Report (AQMR) 2019/2020. This was the most recent data available.¹¹ In total, just over 4.5million relevant international certifications were awarded in this period.

Indicator 1: International Certifications, England (2019/2020)¹²

| Qualification Type | Certifications |
|---|----------------|
| English For Speakers of Other Languages | 3,201,680 |
| Other General Qualifications | 1,171,310 |
| Vocationally-Related Qualifications | 148,705 |
| Occupational Qualifications | 26,865 |
| Other Vocational Qualification | 4,295 |
| Functional Skills | 1,125 |
| Other Life Skills Qualifications | 1,590 |
| Total | 4,555,570 |

As the AQMR was limited to England, the number of qualifications awarded by the other UK nations was estimated using their population size as a proportion of England's as a multiplier. This resulted in an additional 848,440 certifications, bringing the UK total to an estimated figure of 5,404,010.

Indicator 1: UK Nation International Certification Estimates¹³

| | Population (2020) | Certifications |
|---------|-------------------|----------------|
| England | 56,550,000 | 4,555,570 |

¹¹ <https://www.gov.uk/government/statistics/annual-qualifications-market-report-academic-year-2019-to-2020>

¹² <https://www.gov.uk/government/statistics/annual-qualifications-market-report-academic-year-2019-to-2020>

¹³ Population estimates: <https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/bulletins/annualmidyearpopulationestimates/mid2020>

| | Population (2020) | Certifications |
|------------------------|-------------------|------------------|
| Scotland (est) | 5,466,000 | 440,331 |
| Wales (est) | 3,170,000 | 255,370 |
| Northern Ireland (est) | 1,896,000 | 152,738 |
| Total | | 5,404,010 |

These certifications were valued by multiplying the total number of certificates with a cross-level price average of £306¹⁴ to give a total value of international regulated qualifications for 2020/2021 of £1,653,626,958.

As 2019/2020 was the first year that international certifications data was collected for AQMR, an equivalent approach cannot be taken to calculate values for 2018/2019. As an alternative, the average change was calculated percentage between 2020/2021 and 2018/2019 for all other indicators where data for both years was available.¹⁵ This average was applied to the 2020/2021 figures for this indicator, to give an estimated value for 2018/2019 of £2,133,178,766.

Limitations and Considerations

- After discussion with UKSP working group, the approach in the original model was amended to include qualification numbers for 'English For Speakers of Other Languages'.
 - The value of each certification is based on one data point provided to us by a Federation of Awarding Bodies member. Further iterations of this research can be made more robust by obtaining pricing information from a wider range of awarding organisations.
 - As noted, 2019/2020 was the most recently available data at the time of publishing. International qualification numbers for 2020/2021 may vary from this figure given the impacts of Brexit and the COVID 19 pandemic.
 - The approach outlined above deviated from that of the original model, which assumed that qualification numbers would be available broken down by both level and by qualification type. This data, however, was not available; a more nuanced pricing approach would be possible in future research if the underlying data can be requested. Similarly, the collection of data on international certifications awarded by Scotland, Wales and Northern Ireland would improve the accuracy of the value of this indicator.
-

Indicator 2: International Unregulated Qualifications/Certifications

Estimated Value | £536,238,360

To calculate the value of international unregulated qualifications, survey participants were asked to declare what proportion of their international turnover came from this income source.

For each organisation type that declared such income (awarding organisations, colleges and professional

¹⁴ Pricing information was provided by a member of the Federation of Awarding Bodies.

¹⁵ Indicator 10 was excluded from this, given the extremely large difference between the two years, even after weighting.

bodies), the average proportion of international turnover coming from unregulated qualifications per organisation of was calculated. This was then multiplied by the average international turnover¹⁶ of each organisation to give the average value of international unregulated exports; this figure was then uplifted by multiplying it by the estimated number of exporting organisations across the whole sector to give a final estimated export value.

This resulted in an estimated value of international unregulated qualifications of £536,238,360 in 2020/2021, a reduction of around £34m against the 2018/2019 value of £570,709,361.

Indicator 2: International Unregulated Qualifications/Certifications, 2020/2021

| | Awarding Organisations | Colleges | Professional Bodies |
|---|------------------------|--------------|---------------------|
| Average international turnover per organisation | £4,487,906 | £3,058,884 | £2,319,741 |
| Average proportion of int. turnover from unregulated qualifications/certifications/ accreditation (%) | 51.6 | 25.2 | 21.2 |
| Average value of int. unregulated exports per organisation | £2,315,760 | £770,839 | £492,301 |
| Sector export value | £405,257,934 | £107,300,767 | £23,679,659 |
| Total export value | £536,238,360 | | |

In 2020/2021, around half of awarding organisations' international turnover (51.6%) came from unregulated qualifications, certifications and accreditations. This was an increase of around 14 percentage points compared with 2018/2019 levels. Colleges also slightly increased the proportion of their international turnover sourced from unregulated qualifications - from 24% in 2018/2019 to 25.2% in 2020/2021. In this case, however, the slight increase in turnover proportion was not large enough to offset the impact of reduced average international turnover between the two years, leading to a fall in export value of approximately £507million.

For professional bodies, the average proportion of international turnover sourced from unregulated qualifications, certifications and accreditation fell by around 16 points between 2018/2019 (38%) and 2020/2021 (21.2%) leading to a reduction in export value of around £21million.

Indicator 2: International Unregulated Qualifications/Certifications, 2018/2019

| | Awarding Organisations | Colleges | Professional Bodies |
|---|------------------------|--------------|---------------------|
| Average international turnover per organisation | £5,626,388 | £4,480,000 | £2,465,494 |
| Average proportion of int. turnover from unregulated qualifications/certifications/ accreditation (%) | 37.3 | 24.0 | 38.0 |
| Average value of int. unregulated exports per organisation | £2,100,518 | £1,075,200 | £936,888 |
| Sector export value | £367,590,667 | £158,054,400 | £45,064,295 |

¹⁶ See 'Cross-Cutting Indicators' above.

| | Awarding Organisations | Colleges | Professional Bodies |
|--------------------|------------------------|----------|---------------------|
| Total export value | £570,709,361 | | |

Limitations/Considerations

- The data for professional bodies for this indicator had to be weighted due to an outlier in one of the responses. Given that the number of professional bodies that reported income from international unregulated qualifications was also extremely small, caution should be taken when interpreting the results of calculations for this sector.

Indicator 3: UK-bound Student Fee Income

Estimated Value | £511,241,116

To calculate UK-bound student fee income, survey participants from colleges were asked a range of questions around their international student numbers and associated international fees.

In 2020/2021 the estimated value of UK-bound student fees was £511,241,116. This was calculated by multiplying the average fee charged by the average number of international students reported. Survey participants reported an average fee of £6,316 for non-EU students and £5,776 for EU students. Given reported average numbers of 317 non-EU students and 35 EU students per college, this resulted in fee incomes of £464,529,407 and £46,711,709 respectively when scaled up across the UK.

Indicator 3: UK-bound Student Fee Income (Colleges), 2020/2021

| | Non-EU | EU |
|----------------------------|--------------|-------------|
| Average fee | £6,316 | £5,776 |
| Average number of students | 317 | 35 |
| Fee Income | £464,529,407 | £46,711,709 |
| Total value | £511,241,116 | |

In 2018/2019, the average fee charged to non-EU international students was £5,993 and there were, on average, 429 students per college. When scaled up across the UK, this results in an estimated inbound fee income of £629,822,506. This figure does not include any EU students - these were removed from the calculation on the assumption that before the end of the Brexit transition period, fee income was cancelled out by associated subsidies.

Despite the exclusion of these EU student from the calculations and the slightly lower fees charged to non-EU international students, the higher number of both colleges and international students per college means that the total value of UK-bound student fee income was estimated to be approximately £118m higher in 2018/2019 than in 2020/2021.

Indicator 3: UK-bound Student Fee Income (Colleges), 2018/2019

| | Non-EU | EU |
|----------------------------|--------------|----|
| Average fee | £5,993 | |
| Average number of students | 429 | |
| Fee Income | £629,882,506 | |
| Total value | £629,882,506 | |

Limitations/Considerations

- As per the original model, the inclusion of data taken from Association of Colleges' (AOC's) annual survey¹⁷ was considered for this indicator. 2019/2020 data, however, was the most recent available, and given the likely changes in EU student numbers since report publication, it was felt inappropriate to triangulate the figures with those from the UKSP survey for 2020/2021. Triangulation of more recent AOC data may be possible in any further iterations of this research, which would potentially lead to a more nuanced estimate.

Indicator 4: UK-bound Student Expenditure

Estimated Value | £1,955,963,362

UK-bound student expenditure, such as spending on accommodation and food was included as part of the model. This was calculated using Department for Education's student income and expenditure survey.¹⁸ Although this study covers all UK students, it was felt that there was no reason to assume that expenditure level for non-UK domiciled would be significantly different to UK-domiciled students. Similarly, the report covers England and Wales, but we have assumed for the purposes of this research that spending levels were similar across all UK nations.

SIES calculates the mean expenditure of further education students to be £12,413 for full-time FE students and £12,432 for part-time FE students.¹⁹ These were combined to give an average expenditure figure of £12,432. As this figure was calculated for 2014/2015, it was inflated to 2018/2019 and 2020/2021 equivalents using annual consumer price inflation (CPI) rates.²⁰ These figures were then multiplied by the estimated number of in-bound international students (both EU and non-EU) as calculated in indicator three.

Total UK-bound student expenditure was therefore estimated to be £1,955,963,362 in 2020/2021 and £1,995,263,638 in 2018/2019.

¹⁷ <https://www.aoc.co.uk/sites/default/files/AoC%20International%20Survey%20Report%202020.pdf>

¹⁸ https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/693184/Student_income_and_expenditure_survey_2014_to_2015.pdf

¹⁹ This figure is adjusted to remove participant costs, to avoid the double-counting of tuition fees.

²⁰ <https://www.ons.gov.uk/economy/inflationandpriceindices/timeseries/d7g7/mm23>

Indicator 4: UK-bound Student Expenditure²¹

| | 2021/2021 | 2018/2019 |
|--|----------------|----------------|
| Inflation-adjusted expenditure per student | £13,889 | £13,417 |
| Total expenditure | £1,955,963,362 | £1,995,263,638 |

Indicator 5: International Student Fee Income

Estimated Value | £286,181,421

To calculate the value of international student fee income, survey participants were asked to declare what proportion of their international turnover came from training delivered outside the UK, either digitally or in person.

For each organisation type that declared such income (awarding organisations, colleges, professional bodies and sector bodies), the average proportion of international turnover coming from international student fees per organisation was calculated. This was then multiplied by the average international turnover²² of each organisation to give the average value of international unregulated exports; this figure was then uplifted by multiplying it by the estimated number of exporting organisations across the whole sector to give a final estimated export value.

This resulted in an estimated value of international student fee income of £286,181,421 in 2020/2021, compared with £445,985,233 in 2018/2019 - a fall of around £159.8million.

Indicator 5: International Student Fee Income, 2020/2021

| | Awarding Organisations | Colleges | Professional Bodies | Sector Bodies |
|---|------------------------|--------------|---------------------|---------------|
| Average international turnover per organisation | £4,487,906 | £3,058,884 | £2,319,741 | £833,750 |
| Average proportion of int. turnover from int. fees(%) | 15.0 | 30.6 | 30.8 | 20.0 |
| Average value of int. fee exports per organisation | £673,186 | £935,145 | £714,480 | £166,750 |
| Sector export value | £117,807,539 | £130,172,132 | £34,366,500 | £3,835,250 |
| Total export value | £286,181,421 | | | |

The largest reduction in international fee income between the two years was reported by colleges. The average proportion of international turnover attributable fees fell from 39.8% in 2018/2019 to 30.6% in 2020/2021. When combined with the fall in international turnover overall between the two years, this resulted in the value of international fees exports falling from £262,106,880 to £130,172,132.

²¹ https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/693184/Student_income_and_expenditure_survey_2014_to_2015.pdf

²² See 'Cross-Cutting Indicators' above.

The only sector to report an increase in international fee value was professional bodies, where an increased proportion of international turnover from 25.8% in 2018/2019 to 30.8% in 2020/2021 led to estimated sector export values increasing from £30,536,989 to £34,366,500.

Indicator 5: International Student Fee Income, 2018/2019

| | Awarding Organisations | Colleges | Professional Bodies | Sector Bodies |
|---|------------------------|--------------|---------------------|---------------|
| Average international turnover per organisation | £5,626,388 | £4,480,000 | £2,465,494 | £1,227,975 |
| Average proportion of int. turnover from int. fees(%) | 15.0 | 39.8 | 25.8 | 20.0 |
| Average value of int. fee exports per organisation | £843,958 | £1,783,040 | £634,865 | £245,595 |
| Sector export value | £147,692,679 | £262,106,880 | £30,536,989 | £5,648,685 |
| Total export value | £445,985,233 | | | |

Limitations/Considerations

- Of the three sector bodies that responded to the survey, only one reported that international fees represented a proportion of their international turnover. Calculations about the value of the sector export value of international fees should be therefore interpreted with caution.

Indicator 6: Consultancy and Other Income by Providers & Awarding Organisations

Estimated Value | £185,096,917

Survey participants were asked to declare what proportion of their international turnover came from consultancy or other services.

For each organisation type that declared such income, the average proportion of international turnover coming from both consultancy and other international income per organisation was calculated. This was multiplied by the average international turnover²³ of each organisation to give the average value of total exports; this figure was then uplifted by multiplying it by the estimated number of exporting organisations across the whole sector to give a final estimated export value.

The combined total value for consultancy and other services in 2020/2021 was estimated to be £185,096,917. This is a fall of around £110.5 million compared with the 2018/2019 value of £295,601,199. It should be noted, however, that change between the two years is particularly steep for some sectors even when weighted for outliers - given the very small number of data points upon which this figure is based, these results should be interpreted very cautiously.

²³ See 'Cross-Cutting Indicators' above.

Indicator 6: Consultancy Income, 2020/2021

| | Awarding Organisations | Colleges | Professional Bodies | Sector Bodies |
|--|------------------------|-------------|---------------------|---------------|
| Average international turnover per organisation | £4,487,906 | £3,058,884 | £2,319,741 | £833,750 |
| Average proportion of int. turnover from int. consultancy(%) | 15.0 | 5.8 | 1.0 | 30.0 |
| Average value of int. consultancy exports per organisation | £673,186 | £178,435 | £23,197 | £250,333 |
| Sector export value | £117,807,539 | £24,838,140 | £1,115,795 | £5,757,669 |
| Total export value | £149,519,144 | | | |

The estimated export values of consultancy fell amongst all sectors between the two time periods. The largest decreased in proportion of international turnover were reported by sector bodies (from 73.3% to 30.0%) and awarding organisations (from 23.3% in 2018/2019 to 15.0% in 2020/2021). The calculations for both of these sectors, however, were based on extremely small datasets and both required weighting due to outliers in survey responses; as such, it is like that the resulting figures are not representative of the wider sector.

Indicator 6: Consultancy Income, 2018/2019

| | Awarding Organisations | Colleges | Professional Bodies | Sector Bodies |
|--|------------------------|-------------|---------------------|---------------|
| Average international turnover per organisation | £5,626,388 | £4,480,000 | £2,465,494 | £1,227,975 |
| Average proportion of int. turnover from int.consultancy (%) | 23.3 | 4.6 | 1.0 | 73.3 |
| Average value of int. consultancy exports per organisation | £1,312,824 | £207,200 | £24,655 | £900,515 |
| Sector export value | £229,744,167 | £30,458,400 | £1,185,902 | £20,711,845 |
| Total export value | £282,100,314 | | | |

Similarly, the calculations for professional bodies' other income showed a large increase in the proportion of turnover between the two years (from 6.0% in 2018/2019 to 28.0% in 2020/2021) despite weighting for outliers. This means that the resulting increase in estimated export value for other services from £13,500,885 to £35,577,773 may be more extreme than in actuality.

Indicator 6: Other Income, 2020/2021 & 2018/2019

| | 2020/2021 | | 2018/2019 | |
|---|---------------------|---------------|---------------------|---------------|
| | Professional Bodies | Sector Bodies | Professional Bodies | Sector Bodies |
| Average international turnover per organisation | £2,319,741 | £833,750 | £2,465,494 | £1,227,975 |
| Average proportion of int. turnover from other(%) | 28.0 | 20.0 | 6.0 | 20.0 |
| Average value of other exports per organisation | £649,528 | £166,750 | £147,930 | £245,595 |
| Sector export value | £31,242,273 | £4,335,500 | £7,115,415 | £6,385,470 |
| Total export value | £35,577,773 | | £13,500,885 | |

Limitations/Considerations

- As noted above, a low number of data points combined with outliers in individual responses may mean that changes in estimated export value between timepoints are less extreme than these calculations suggest.

Indicator 7: Consultancy By Consultants

The original model proposed skills exports by consultancy organisations, but there were insufficient survey responses to allow for any usable analysis. Basing calculations solely on existing data was felt to be inappropriate. This was due (a) to the paucity of data in this area and the resulting significant number of assumptions that would have to be made in any estimate and (b) the potential for double counting with indicator 6.

In any further iterations of this research, we recommend developing approaches for engaging with wider consultancy organisations who may not regard themselves as part of the skills ecosystem. Developing robust estimates of the wider sector size would allow for more accurate estimates of total skills sector export values in future.

Indicator 8: Chartered/Institute Memberships

Estimated Value | £986,580,296

Estimated international chartered/institute membership exports were calculated using a random sample of 16 institutions. For these sampled organisations, data was collected on their average membership fee and member numbers.

For those where information could be sourced, membership fees across all levels were averaged to give a combined average fee for each organisation. There were then averaged across the sample to give a value of £192 per member.

The proportion of memberships that were non-UK based was more difficult to source, with only two figures available. These were averaged to give an estimate proportion of international memberships of 8%.

Results were then uplifted across the total number of chartered institutes registered in the UK²⁴ and multiplied by 0.2, which represents the estimate proportion of membership fees that are dedicated specifically towards institutes' skills offer. This multiplier was developed on the assumption that around one fifth of professional body activity is targeted at training/CPD/other skills-related activity.²⁵

This gave an estimated export value of £986,580,296 for 2020/2021.

Indicator 8: Chartered/Institute Memberships

| | 2020/21 |
|--|--------------|
| Number of chartered/professional institutes | 2,968 |
| Sampled average membership per organisation | 108,205 |
| Sampled average membership fee per organisation | 192 |
| Estimated proportion of international members (%) | 8% |
| Total skills-related international membership fees | £986,580,296 |

While the methodology used for this indicator was suitable for producing an estimate for 2020/2021, it was not possible to produce an equivalent value for 2018/2019. To provide a proxy figure, the average change between 2020/2021 and 2018/2019 for all other model indicators was calculated.²⁶ This overall average change was applied to the 2020/2021 figures for this indicator, to give an estimated value for 2018/2019 of £1,272,688,581.

Limitations/Considerations

- The estimated proportion of international memberships is based on only two data points; increasing this number in any further research would make estimates more robust.
- Adding an option for survey participants to state the proportion of their international turnover that comes from membership fees would provide additional data that could either be used instead of, or triangulated with, desk research in any further versions of this research.
- As with consultancy organisations, it is possible that chartered institutes may not regard themselves as being part of the skills sector per se. Furthermore, developing strategies to engage with them and encouraging participation in future research may be of benefit.

²⁴ <https://www.gov.uk/government/publications/professional-bodies-approved-for-tax-relief-list-3/approved-professional-organisations-and-learned-societies>

²⁵ This is a quantitative estimate based on a qualitative review of the amount of attention given to these issues on the sampled professional bodies' websites.

²⁶ Indicator 10 was excluded from this, given the extremely large difference between the two years, even after weighting.

Indicator 9: Skills-related Supplies, including EdTech

Estimated Value | £145,090,489

Survey participants were asked to declare what proportion of their international turnover came from skills-related supply (SRS) including publishing and EdTech. Unfortunately, there were insufficient survey responses to allow for any usable analysis and estimation of the skills-related portion of the wider SRS industry.

A small number of awarding organisations and colleges, however, provided information saying that much of their international turnover comes from SRS. This allowed us to make an estimate of the value of this portion of generated exports.

For each organisation type that declared such income, the average proportion of international turnover coming from SRS per organisation was calculated. This was multiplied by the average international turnover²⁷ of each organisation to give the average value of total exports; the figure was then uplifted by multiplying it by the estimated number of exporting organisations across the whole sector to give a final estimated export value.

This resulted in an estimated value of skills-related supply exports of £145,090,489 in 2020/2021, a reduction of around £38.8million against the 2018/2019 value of £183,902,738.

Amongst awarding organisations, the proportion of SRS exports increased slightly between 2018/2019 (15.3%) and 2020/2021 (16.7%) but this was offset by a reduction in average international turnover between the two years; this led to the overall export value decreasing from an average of £862,713 to £747,984 per organisation. For colleges, there was also a reduction in SRS exports - from an average of £224,000 per college in 2018/2019 to £101,963 in 2020/2021.

Indicator 9: Skills-related Supply, 2020/2021 & 2018/2019

| | 2020/2021 | | 2018/2019 | |
|---|------------------------|-------------|------------------------|-------------|
| | Awarding Organisations | Colleges | Awarding Organisations | Colleges |
| Average international turnover per organisation | £4,487,906 | £3,058,884 | £5,626,388 | £4,480,000 |
| Average proportion of int. turnover from other(%) | 16.7 | 3.3 | 15.3 | 5.0 |
| Average value of other exports per organisation | £747,984 | £101,963 | £862,713 | £224,000 |
| Sector export value | £130,897,266 | £14,193,223 | £150,974,738 | £32,928,000 |
| Total export value | £145,090,489 | | £183,902,738 | |

²⁷ See 'Cross-Cutting Indicators' above.

Limitations/considerations

- As noted above, it was not possible to include data received from dedicated skills-related supply organisations due a lack of usable responses. Inclusion of such data in further iterations of this research would make the estimated export value more accurate.
 - Data for colleges had to be weighted due to an outlier in one of the responses. Given that the number of organisations that reported income from skills-related supply was also extremely small, caution should be taken when interpreting the results of calculations for this indicator.
-

Indicator 10: Training of English Language Teacher Trainers

Estimated Value | **£39,267,917**

Survey participants were asked to declare what proportion of their international turnover came from the training of English language teacher trainers, with responses received from a number of colleges.

The average proportion of international turnover coming from the training of English language teacher trainers (ELTT) per college was calculated. This was multiplied by the average international turnover²⁸ per college to give the average value of total exports; the figure was then uplifted by multiplying it by the estimated number of exporting colleges across the UK to give a final estimated export value.

The estimated value of training English language teacher trainers fell from £102,547,200 in 2018/2019 to £39,267,917 in 2021/2022. The calculation for this question, however, was based on a very small dataset and the changes in turnover proportion between the two years was quite steep, even after weighting outliers. The actual difference in value between the two years may therefore not be as extreme as these calculations suggest.

Indicator 10: Training of English Language Teacher Trainers, Colleges

| | 2021/2021 | 2018/2019 |
|---|-------------|--------------|
| Average international turnover per organisation | £3,058,884 | £4,480,000 |
| Average proportion of int. turnover from ELTT training(%) | 9.2 | 15.6 |
| Average value of ELTT training exports per organisation | £282,097 | £697,600 |
| Sector export value | £39,267,917 | £102,547,200 |

²⁸ See 'Cross-Cutting Indicators' above.

Appendices

A.1 UK Skills Sector Exports Survey

UK Skills Sector Exports Survey: Survey Questions

| Question | Response Options |
|--|--|
| Questions for all organisations | |
| Are you happy to take this survey? | Yes No |
| Is your organisation registered in the United Kingdom? Please select one option. | Yes No |
| In which nation is your organisation headquartered? Please select one option. | England Northern Ireland Scotland Wales |
| How many full-time equivalent employees does your organisation currently have in the UK? An estimate is fine if you do not have exact figures. Please select one option. | 1 - 10 11 - 50 51 - 250 251 - 500 501 - 1,000 1,000 |
| What type of organisation are you? Please select one option. If more than one of the following list applies, please choose the category which represents the largest value to your organisation. | Awarding organisation College (publicly funded) Independent training provider Professional body or institute Consultancy Sector body (e.g. SSC/NSA) Equipment and/or technology provider Recruitment organisation Other (please specify) |

| Question | Response Options |
|---|---|
| <p>What are the main skills-related services that your organisation provides? Please choose as many of the following answers as apply.</p> | <p>Workforce research / labour market information</p> <p>Occupational skills standards development</p> <p>Curriculum development</p> <p>Digital content development</p> <p>Teacher training</p> <p>Education and teaching (including apprenticeships)</p> <p>International supply of education products and equipment, including publishing and EdTech</p> <p>Qualifications/certifications</p> <p>Chartered/institute membership</p> <p>Student recruitment</p> <p>Careers advice and guidance</p> <p>Management/workforce planning/skills consultancy</p> <p>Other (please specify)</p> |
| <p>Does your organisation provide any skills-related products and services to individuals or organisations not based in the UK? Please select one option.</p> | <p>Yes</p> <p>No</p> <p>Don't know</p> |
| <p>Which of these do you export? Please note that for this question, unregulated qualifications refer to those not regulated by Ofqual. Please tick all options that apply:</p> | <p>Teaching international students in the UK (please include EU students and students of teaching and/or training)</p> <p>Regulated qualifications, certification and/or accreditation</p> <p>Unregulated qualifications, certification and/or accreditation</p> <p>Training delivered outside of the UK, either digitally or in-person</p> <p>English language teaching, excluding the training of English Language Teacher Trainers</p> <p>Training of English Language Teacher Trainers</p> |

| Question | Response Options |
|--|---|
| | <p>International supply of education products and equipment, including publishing and EdTech</p> <p>International consultancy (e.g. qualifications and skills system development; skills benchmarking)</p> <p>International membership fees</p> <p>Other (please specify)</p> |
| <p>Have you played any role in supporting international organisations to invest in the UK? Please select one option.</p> | <p>Yes</p> <p>No</p> <p>Don't know</p> |
| <p>If yes, how many organisations have you supported in the last financial year? Please enter the total number.</p> | <p>Open-Ended Response</p> |
| <p>What was your organisation's approximate turnover for the 2020-2021 financial year (or the closest year available to this)? Please select one option.</p> | <p>0 - £100k</p> <p>£100k - £250k</p> <p>£250k - £500k</p> <p>£500k - £750k</p> <p>£750k - £1m</p> <p>£1m - £1.5m</p> <p>£1.5m - £2m</p> <p>£2m - £3m</p> <p>£3m - £5m</p> <p>£5m - £10m</p> <p>£10m - £20m</p> <p>£20m - £40m</p> <p>£40m - £70m</p> <p>£70m - £100m</p> <p>£100m+</p> |
| <p>What was your organisation's approximate turnover for the 2018-2019 financial year (or the closest year available to this)? Please select one option.</p> | <p>0 - £100k</p> <p>£100k - £250k</p> <p>£250k - £500k</p> |

| Question | Response Options |
|--|--|
| | <p>£500k - £750k</p> <p>£750k - £1m</p> <p>£1m - £1.5m</p> <p>£1.5m - £2m</p> <p>£2m - £3m</p> <p>£3m - £5m</p> <p>£5m - £10m</p> <p>£10m - £20m</p> <p>£20m - £40m</p> <p>£40m - £70m</p> <p>£70m - £100m</p> <p>£100m+</p> |
| <p>Approximately how much of your current turnover (the 2020-2021 financial year or the closest year available to this) comes from international skills activity? Skills, for the purposes of this study, can be considered as part of lifelong learning and can take place at secondary, post-secondary and tertiary levels. It includes work-based learning, continuing training and professional development which may or may not lead to qualifications. It also includes a wide range of skills development opportunities attuned to national and local priorities and contexts. Please give a percentage without the % symbol (e.g. 20.5 rather than 20.5%).</p> | <p>Open-Ended Response</p> |
| <p>Approximately how much of your turnover came from international skills activity for the 2018-2019 financial year (or the closest year available to this)? Please give a percentage without the % symbol (e.g. 20.5 rather than 20.5%).</p> | <p>Open-Ended Response</p> |

| Question | Response Options |
|---|---|
| <p>Of the amount of revenue generated from international skills activity, what percentage is made up of each of the following activities for the 2020-2021 financial year (or the closest year available to this)? Please enter the percentage as a number for each area (0 if appropriate), without the % symbol, ensuring that percentages add up to 100.</p> | <p>Teaching international students in the UK (please include EU students and students of teaching and/or training)</p> <p>International regulated qualifications, certification and/or accreditation</p> <p>International unregulated qualifications, certification and/or accreditation</p> <p>Training delivered outside of the UK, either digitally or in person</p> <p>English language training, excluding the training of English Language Teachers</p> <p>Training of English Language Teacher Trainers</p> <p>International supply of education products and equipment, including publishing and EdTech</p> <p>International consultancy (e.g. qualifications and skills system development; skills benchmarking)</p> <p>Other (please specify)</p> |
| <p>Of the amount of revenue generated from international skills activity, what approximate percentage is made up of each of the following activities for the 2018-2019 financial year (or the closest year available to this)? Please enter the percentage as a number for each area (0 if appropriate), without the % symbol, ensuring that percentages add up to 100.</p> | <p>Teaching international students in the UK (please include EU students and students of teaching and/or training)</p> <p>International regulated qualifications, certification and/or accreditation</p> <p>International unregulated qualifications, certification and/or accreditation</p> <p>Training delivered outside of the UK, either digitally or in-person</p> <p>English language training, excluding the training of English Language Teachers</p> <p>Training of English Language Teacher Trainers</p> <p>International supply of education products and equipment, including publishing and EdTech</p> <p>International consultancy (e.g. qualifications and skills system development; skills benchmarking)</p> <p>Other (please specify)</p> |

| Question | Response Options |
|---|---|
| <p>What percentage of your international skills export revenue, approximately, comes from each of the following regions? Please enter the percentage as a number for each area (0 if appropriate), without the % symbol, ensuring that percentages add up to 100.</p> | <p>Europe</p> <p>Middle East and North Africa</p> <p>West, Central, South and East Africa</p> <p>Central and South Asia</p> <p>East and Southeast Asia</p> <p>North America</p> <p>Latin America and the Caribbean</p> <p>Oceania</p> |
| <p>Please add any comments here that might help us to understand your figures if they are not straightforward.</p> | <p>Open-Ended Response</p> |
| <p>Questions for colleges</p> | |
| <p>How many international students do you have, or expect to have, in the current academic year (2021-2022)? Please enter the total number.</p> | <p>Open-Ended Response</p> |
| <p>How many of these international students are from the EU (and do not have settled status or other UK residency)? Please enter the total number.</p> | <p>Open-Ended Response</p> |
| <p>How many international students are studying English language programmes (excluding those who are studying to become English Language Teacher Trainers)? Please enter the total number.</p> | <p>Open-Ended Response</p> |
| <p>How many international students did you have in the 2018-2019 academic year? Please enter the total number.</p> | <p>Open-Ended Response</p> |
| <p>How many of these international students were from the EU (and do not have settled status or other UK residency)? Please enter the total number.</p> | <p>Open-Ended Response</p> |
| <p>How many international students were studying English language programmes in the 2018-19 academic year (excluding those who were studying to become English Language Teacher Trainers)? Please enter the total number.</p> | <p>Open-Ended Response</p> |

| Question | Response Options |
|--|---------------------|
| What is the average fee you charge to international students from outside the EU? Please enter the figure in £ sterling. | Open-Ended Response |
| What is the average fee you now charge to EU students? Please enter the figure in £ sterling. | Open-Ended Response |

A.2 Survey Turnover Bands

UK Skills Sector Exports Survey Data: Turnover Band VLOOKUP Table

| Code | Midpont | Band |
|------|--------------|---------------|
| 1 | 50,000 | 0 - £100k |
| 2 | 175,000 | £100k - £250k |
| 3 | 375,000 | £250k - £500k |
| 4 | 625,000 | £500 - £750k |
| 5 | 875,000 | £750k - £1m |
| 6 | 1,250,000 | £1m - £1.5m |
| 7 | 1,750,000 | £1.5m - £2m |
| 8 | 2,500,000 | £2m - £3m |
| 9 | 4,000,000 | £3m - £5m |
| 10 | 7,500,000 | £5m - £10m |
| 11 | 15,000,000 | £10m - £20m |
| 12 | 30,000,000 | £20m - £40m |
| 13 | 55,000,000 | £40m - £70m |
| 14 | 85,000,000 | £70m - £100m |
| 15 | 100,000,000 | £100m+ |
| N/A | Not provided | “Blank” |

A.3 Survey Demographic Data

UK Skills Sector Exports Survey: Demographic Data

| Indicator | Options | Count |
|-------------------------------------|--------------------------------------|-------|
| Nation of organisation headquarters | England | 46 |
| | Northern Ireland | * |
| | Scotland | 9 |
| | Wales | 10 |
| Number of full-time UK employees | 1 - 10 | 6 |
| | 11 - 50 | 13 |
| | 51 - 250 | 14 |
| | 251 - 500 | 9 |
| | 501 - 1,000 | 13 |
| | 1,000 | 14 |
| Organisation type | Awarding organisation | 17 |
| | College (publicly funded) | 30 |
| | Independent training provider | * |
| | Professional body or institute | 9 |
| | Consultancy | * |
| | Sector body (e.g. SSC/NSA) | * |
| | Equipment and/or technology provider | * |
| | Recruitment organisation | * |

* Data suppressed to protect anonymity, as there were fewer than 5 responses.