



Student statistics report 2021

ENGLISH LANGUAGE STUDENTS IN THE UK IN 2020

05/2021

Executive summary

[englishuk.com](https://www.englishuk.com)

STUDENT STATISTICS REPORT 2021 – EXECUTIVE SUMMARY

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Prepared on behalf of:



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INTRODUCTION

This student statistics report makes gloomy reading for everyone who cares about UK ELT, laying bare the devastation wreaked upon a global industry by a global pandemic. Though the Covid-19 picture in the UK is looking increasingly positive and more students may feel confident about booking, continuing restrictions on inbound travel may delay recovery.

But there is hope in the gloom. For instance, numbers of students enrolling on blended courses tell a story of resourcefulness, resilience and innovation: vital cornerstones of rebuilding.

Recovery is our priority, and these statistics have an important role. Our roadmap to recovery outlines our plan to rebuild confidence in world markets, working in partnership with the UK government and the British Council to amplify our message.

METHODOLOGY

The core data in this report was collated from English UK annual student data submissions returned between 2010 and 2020.

Due care and attention were paid to align the annual data as much as possible. Notwithstanding, some of the figures in the report may not be directly comparable for the following reasons:

- The number of state and private sector centres in the English UK membership fluctuates year-on-year (y-o-y). Where appropriate, we have therefore introduced historical comparisons based on the same research sample (only centres reporting in both 2019 and 2020).
- Of the overall English UK membership, 13 were not in a position to supply their annual data and were, therefore, excluded from the 2020 reporting.
- Not all English UK private sector and state sector members are able to report more detailed information about their student population, and the sample per student age and country of origin breakdown varies. The actual number of reporting providers is always noted below the respective chart or table.
- Traditionally centres have been asked to report only on courses that take place face-to-face. To understand the impact of the pandemic, exceptionally for 2020, centres were also asked to report on student weeks that had originally been booked as face-to-face courses but due to Covid-19 had to be switched to a different mode of teaching delivery, either during the course itself or prior to course commencement.

Note: A full-time student week is defined as one student taking 10 or more teacher-taught hours in one week. In line with English UK's categorisation, part-time students are understood to be international English language students enrolled on courses offering fewer than 10 teacher-taught hours per week.

ACCESS THE FULL REPORT

English UK members may access the full student statistics report here:

www.englishuk.com/resources-and-reports/uk-elt-data

For other stakeholders, media and interested parties, please contact Jodie Gray, Chief Executive, at Jodie.Gray@englishuk.com.

KEY FINDINGS

General Overview

- In 2020, English UK members welcomed 83,446 full-time English language students for a combined 530,756 student weeks.
- Those numbers tumbled during the course of 2020 due to Covid-19, as in every major English Language Teaching (ELT) destination, with overall y-o-y declines of -71.1% in terms of student weeks and -83.6% in the number of students studying at English UK member centres. This figure does not reflect fluctuation in English UK membership.
- In a reverse of recent trends, across the whole membership, adults outnumbered junior students. Students under the age of 18 represented only 23% of the student population.
- There was an unprecedented decline in English UK's membership base, falling by 69 centres, from 415 in 2019.
- One in four weeks was spent in London, which had the highest share of all UK regions. The second most popular region for English language students was Northern England which accounted for 24% of all student weeks spent in the UK.
- In addition, 15,213 part-time students enrolled at English UK member centres.

State Sector Member Centres

- Thirty-nine state sector member centres reported in 2020 welcoming 13,804 full-time English language students, who cumulatively stayed for 155,405 weeks.
- As a result of Covid-19, these overall figures translated into considerable y-o-y decreases, namely 59.5% and 53.5% respectively. This figure does not reflect fluctuation in English UK membership.
- Course duration increased from 9.8 weeks to 11.3 weeks, with adult students studying for an average of 11.6 weeks (up from 10.9 in 2019) and juniors for 2.3 weeks (2 weeks in 2019).
- In 2020, the top five sending markets for the state sector were China (43.7% of total student weeks), Poland (7%), Saudi Arabia (6.6%), Spain (5%) and Japan (3.2%).
- In the state sector, almost half (49%) of students attended their classes online either fully online in the UK (6%) or outside the UK (43%). 37% of students studied via blended classes (face-to-face and then switched to online or vice versa).
- English UK's state sector members additionally taught 6,560 part-time English language students for a total of 96,485 student weeks.

Private Sector Member Centres

- The 294 private sector member centres accounted for 69,642 students, who delivered a total of 375,351 weeks.
- Overall, the number of student weeks decreased by 75%, while student numbers fell by 85%. This figure does not reflect fluctuation in English UK membership.
- In 2020, 57% of all students were taught their language courses face-to-face while 30% enrolled and studied via the blended method. Almost every fifth student moved online, either within (4%) or outside (10%) the UK.
- Junior students enrolled in 112 private sector centres, which catered to an average of 169 students. The average number of adults per member centre stood at 244.
- The under-18 age band comprised 27% of all students and 10% of weeks in the sector.
- The average length of stay of an adult student increased to 6.7 weeks. Juniors stayed for an average of 1.9 weeks.
- The top five sending markets in 2020 were Saudi Arabia (19.2% of total student weeks), France (7.1%), Italy (6.8%), China (5.6%) and Japan (5.4%).
- English UK private sector members also catered to 8,653 part-time students.

OVERALL DATA

ENGLISH UK MEMBERSHIP OVERVIEW

MARKET SIZE



333

REPORTING CENTRES

-80

VS 2019



83,446

STUDENTS

-81.1%

VS 2019



530,756

STUDENT WEEKS

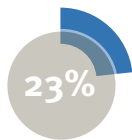
-66.9%

VS 2019

Source: English UK, 2020; year-on-year comparison is based on data from centres reporting in both 2019 and 2020 (n=327)

AGE SEGMENTS

MARKET SHARES



23%

OF ALL STUDENTS WERE JUNIORS



7%

PROPORTION OF STUDENTS WEEKS SPENT BY JUNIORS

Source: English UK, 2020; n=333 member centres

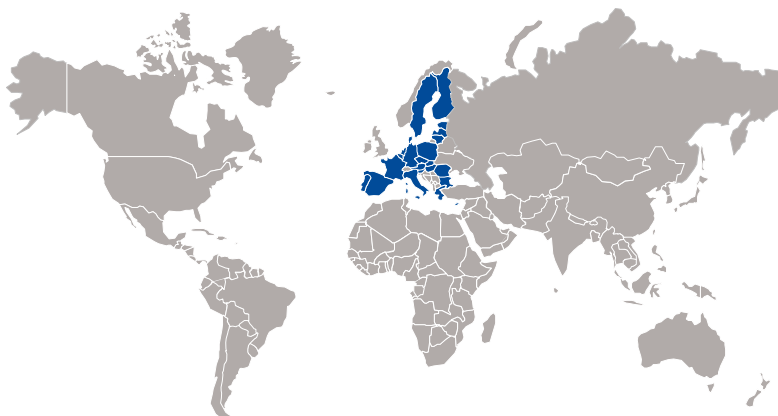
STUDENT ORIGIN

MARKET SHARES

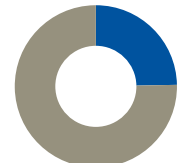
STUDENT NUMBERS



NON-EU EU



STUDENT WEEKS

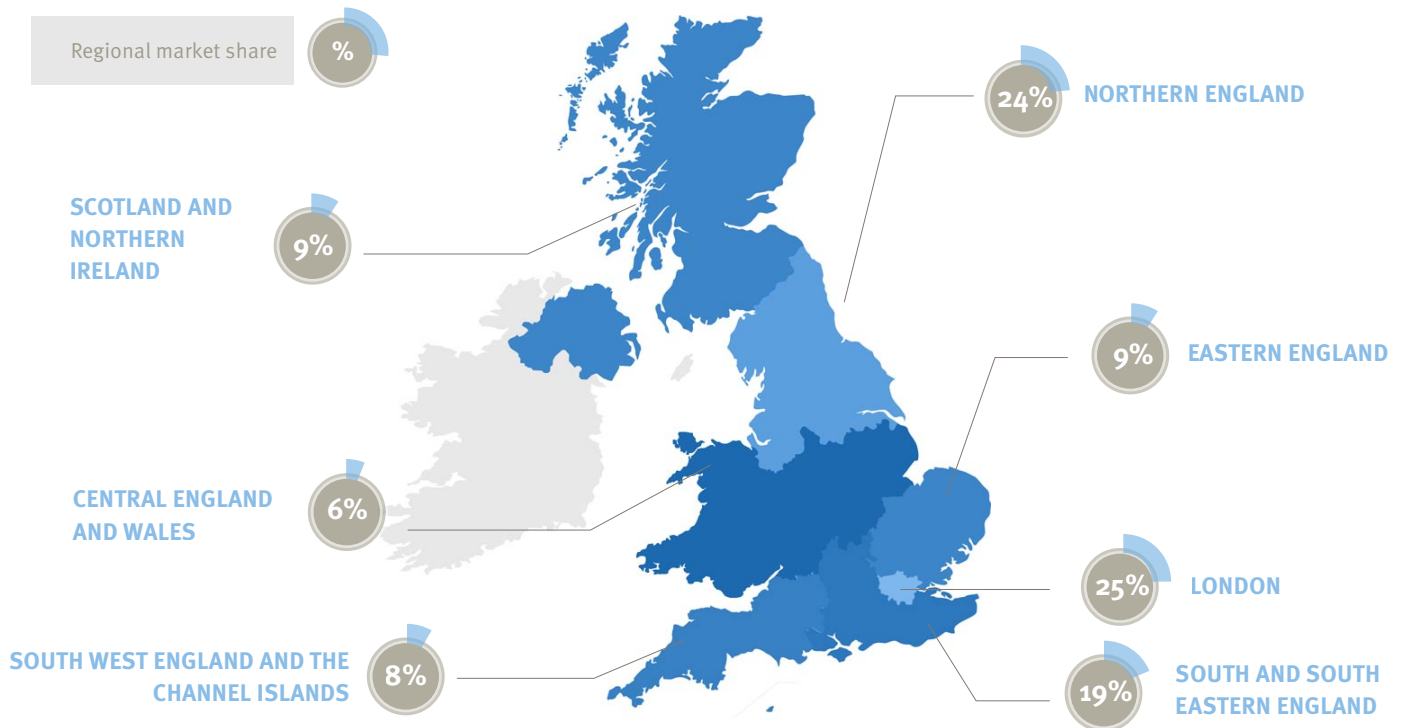


NON-EU EU

Source: English UK, 2020; n=327 member centres

REGIONAL OVERVIEW

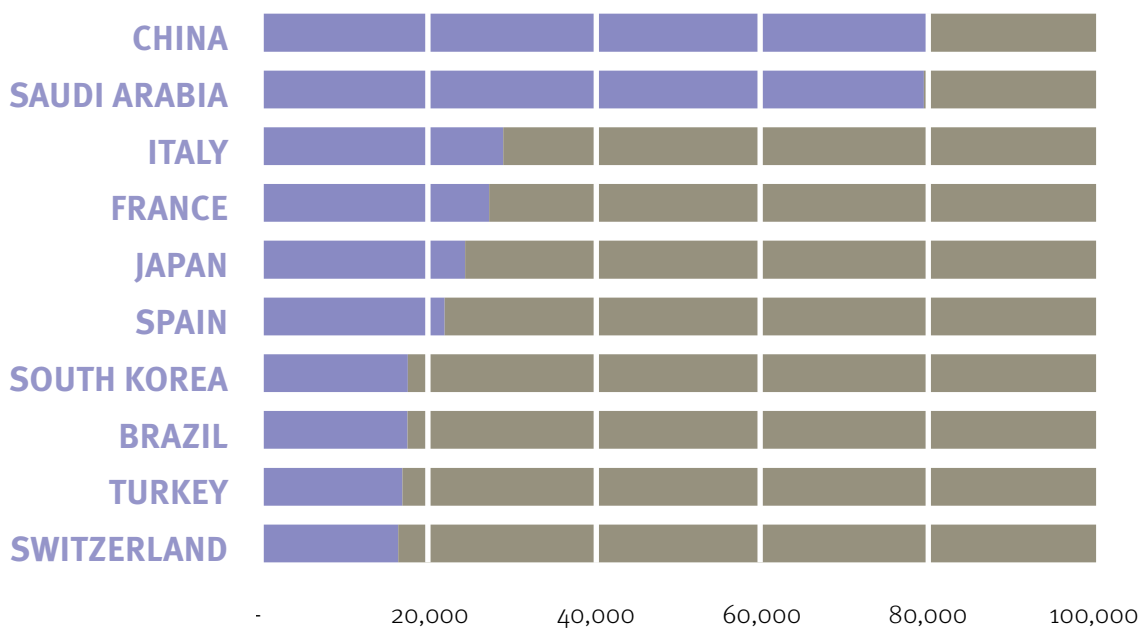
PERCENTAGE OF TOTAL STUDENT WEEKS



Source: English UK, 2020; n=333 member centres

TOP SOURCE MARKETS

STUDENT WEEKS



Source: English UK, 2020; n=327 member centres

STATE SECTOR

STATE SECTOR OVERVIEW

MARKET SIZE



39

REPORTING CENTRES

-15

VS 2019



13,804

STUDENTS

-46.6%

VS 2019



155,405

STUDENT WEEKS

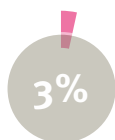
-42.2%

VS 2019

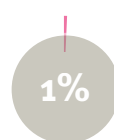
Source: English UK, 2020; year-on-year comparison is based on data from centres reporting in both 2019 and 2020 n=39 state sector member centres

AGE SEGMENTS

MARKET SHARES



OF ALL
STUDENTS
WERE JUNIORS



PROPORTION OF
STUDENTS WEEKS
SPENT BY JUNIORS

Source: English UK, 2020; n=39 state sector member centres

AVERAGE LENGTH OF STAY

WEEKS

ADULTS



11.6

JUNIORS

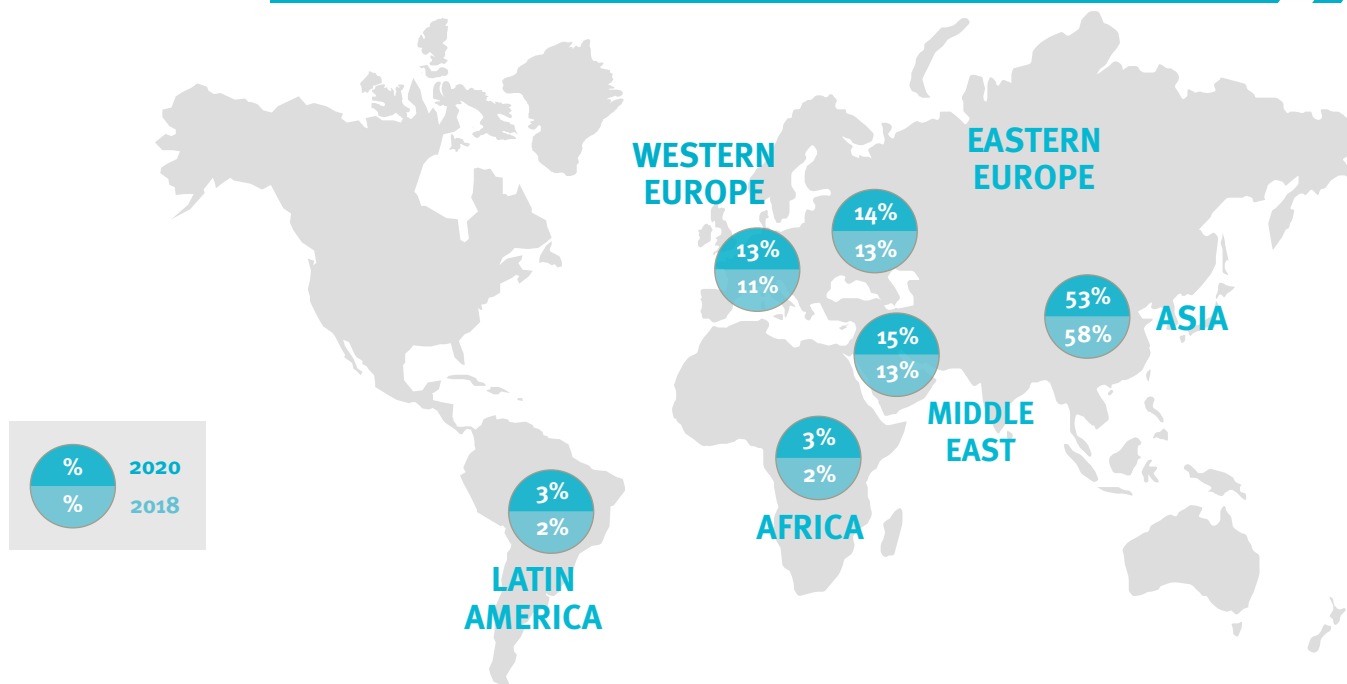


2.3

Source: English UK, 2020; n=39 state sector member centres

SOURCE REGIONS

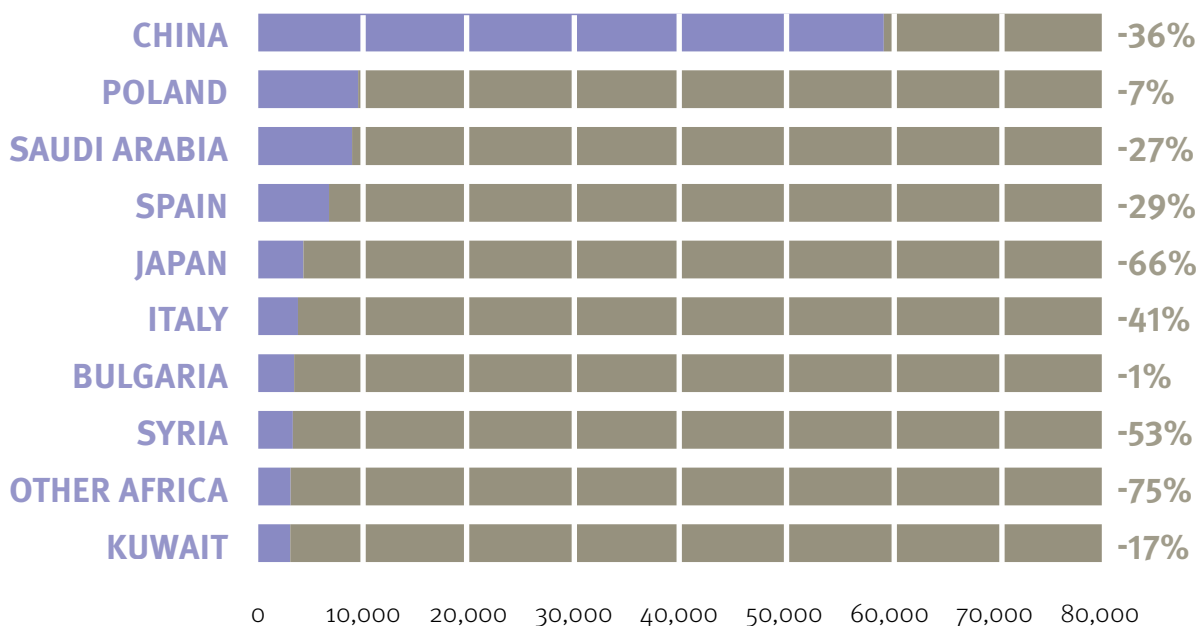
PERCENTAGE OF TOTAL STUDENT WEEKS



Source: English UK, 2020; a comparison of 2018 and 2020 figures does not reflect fluctuation in English UK membership; 2020 n=36 and 2018 n=50 member centres

TOP SOURCE MARKETS

STUDENT WEEKS & YEAR-ON-YEAR CHANGE



Source: English UK, 2020; n=36 state sector member centres (y-o-y changes are based on a sample of 36 providers reporting in both 2019 and 2020 to provide a like-for-like comparison).

PRIVATE SECTOR

PRIVATE SECTOR OVERVIEW

MARKET SIZE



359

REPORTING CENTRES

-65

VS 2019



69,642

STUDENTS

-83.3%

VS 2019



375,351

STUDENT WEEKS

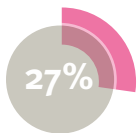
-71.9%

VS 2019

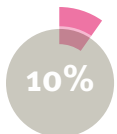
Source: English UK, 2020; year-on-year comparison is based on data from centres reporting in both 2019 and 2020 n=288 private sector members

AGE SEGMENTS

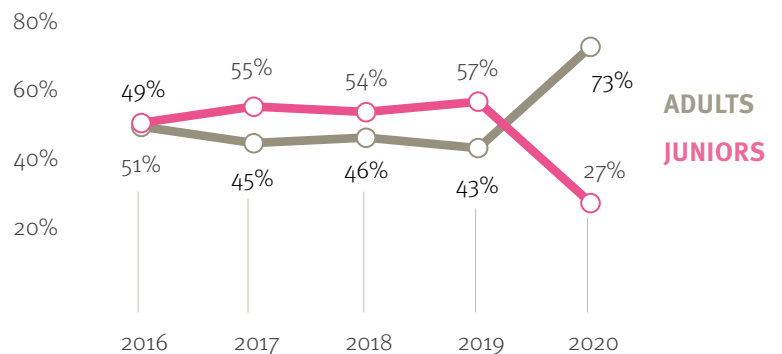
MARKET SHARES & HISTORIC TREND



OF ALL STUDENTS WERE JUNIORS IN 2020



PROPORTION OF STUDENTS WEEKS SPENT BY JUNIORS IN 2020



Source: English UK, 2020; the number of member centres fluctuated over the measured period, ranging between 294 and 368 member centres.

AVERAGE LENGTH OF STAY

WEEKS

ADULTS

6.7



JUNIORS

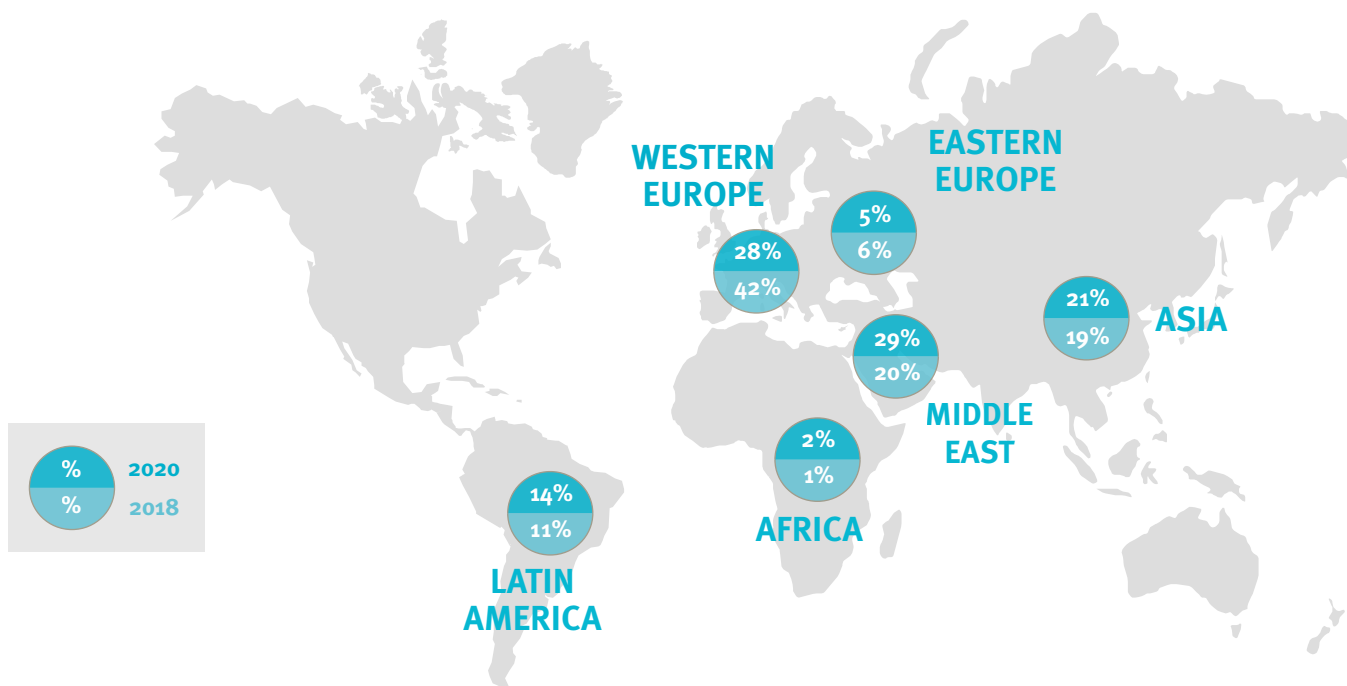
1.9



Source: English UK, 2020; n=294 private sector member centres

SOURCE REGIONS

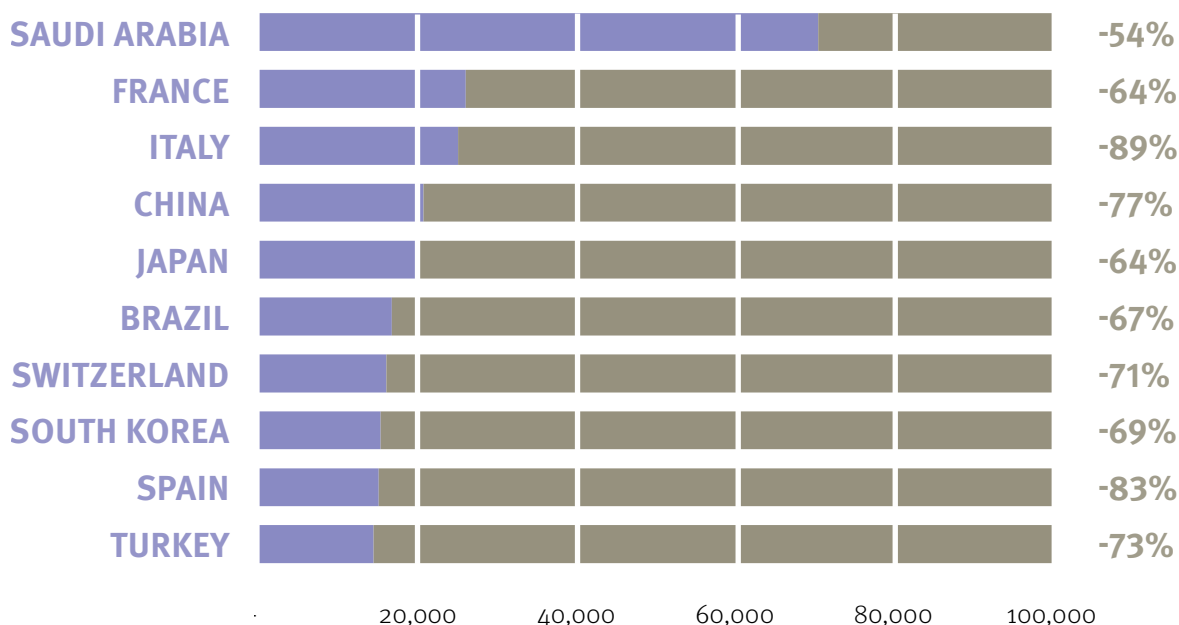
PERCENTAGE OF TOTAL STUDENT WEEKS



Source: English UK, 2020; a comparison of 2018 and 2020 figures does not reflect fluctuation in English UK private sector membership, 2020 n=291 and 2018 n=338 member centres

TOP SOURCE MARKETS

STUDENT WEEKS & YEAR-ON-YEAR CHANGE



Source: English UK, 2020 n=291 private sector member centres (y-o-y changes are based on a sample of 284 providers reporting in both 2019 and 2020 to provide a like-for-like comparison)

PART-TIME STUDENTS

In line with English UK's categorisation, part-time students are understood to be international English language students enrolled on courses offering fewer than 10 teacher-taught hours per week.

PART-TIME OVERVIEW

MARKET SIZE



333

REPORTING CENTRES



15,213

STUDENTS



136,431

STUDENT WEEKS

PART-TIME STUDENT NUMBERS



6,560

STATE SECTOR

8,653

PRIVATE SECTOR

PART-TIME STUDENT WEEKS



96,485

STATE SECTOR

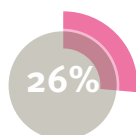
39,946

PRIVATE SECTOR

Source: English UK, 2020; n=333 member centres (n=294 private sector members and n=39 state sector members)

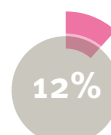
AGE SEGMENTS

MARKET SHARES



26%

OF ALL PART-TIME STUDENTS WERE JUNIORS



12%

PROPORTION OF PART-TIME STUDENTS WEEKS SPENT BY JUNIORS

Source: English UK, 2020; n=92 member centres



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