

THE UK IN THE GLOBAL CONTEXT

In 2021, the global ELT industry served 304,402 students who delivered a total of 3,075,973 weeks in the eight major destination countries: Australia, New Zealand, Canada, the US, the UK, Ireland, Malta and South Africa. This is only a fraction of what the sector achieved before the pandemic.

Compared to 2019 figures, student weeks witnessed a drop of 70% (from 10 million to 3 million). In student numbers, the decline was even steeper. Numbers fell by 78% between 2019 and 2021, from almost 1.4 million students travelling to study English abroad to a little over 300,000 students doing so.

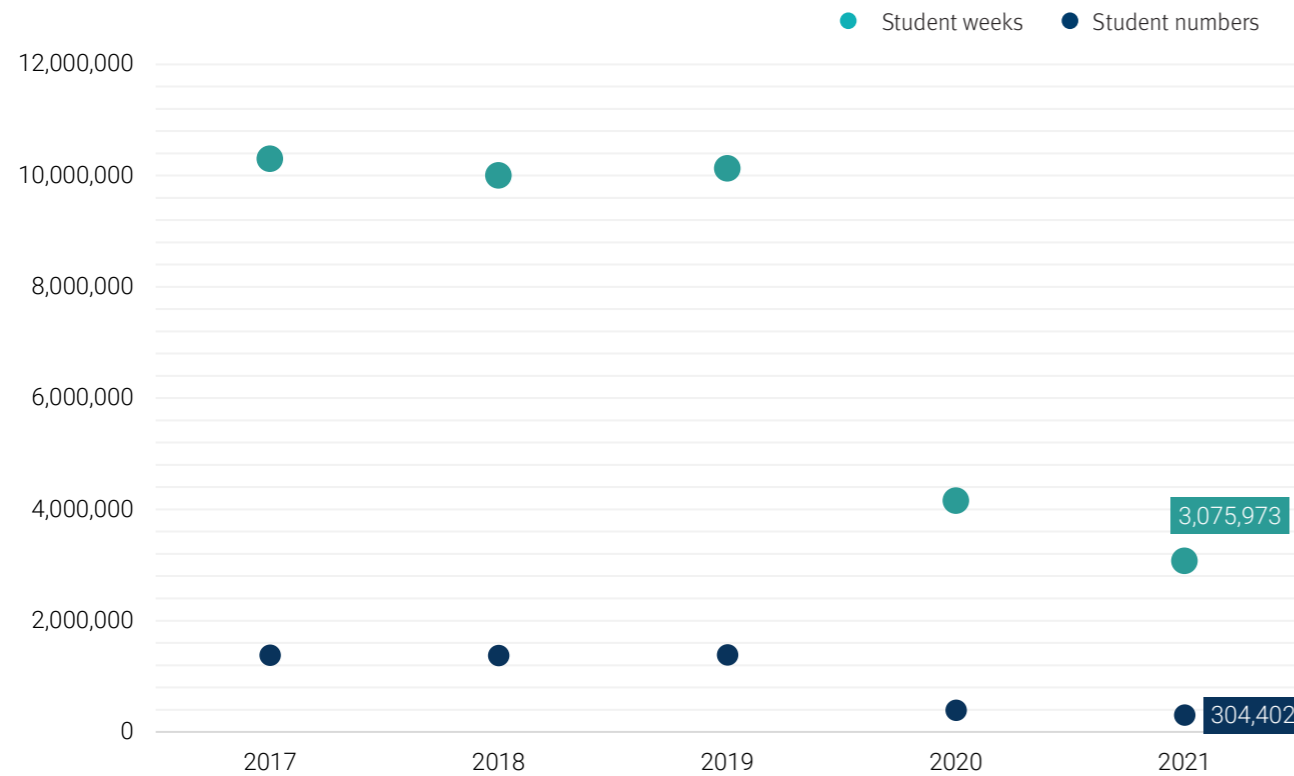
Canada recorded the highest number of student weeks in 2021 compared to 2019, which was thanks to a smaller decline (-52%) than that seen in other destinations.

Some positive signs of recovery were seen in 2021. In Malta, student numbers increased by 69%, and another country registering a strong increase was South Africa, with a 71% rise in student numbers. In the US, student numbers increased by a more modest 8%.

In 2021, the ongoing impact of the pandemic on the UK ELT sector was devastating: in two years, the country lost over half a million English language students and its position as the biggest ELT destination in the world. After Australia (decline of 79%), the UK experienced the second largest drop between 2021 and 2019, namely of 75%.

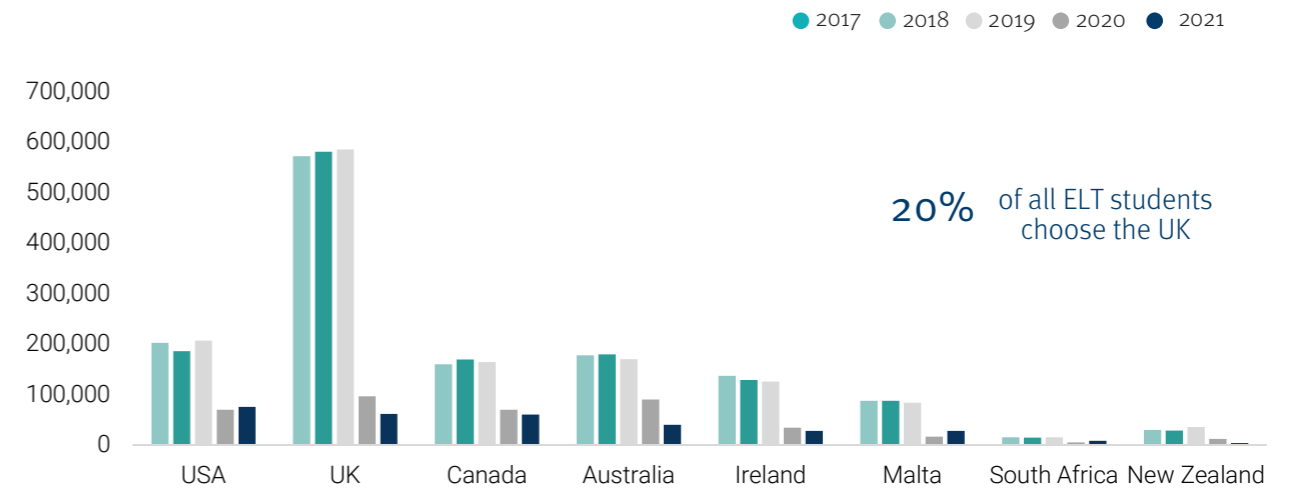
However, recent data from the QUIC Scheme paints a more positive picture and shows the industry has started to recover in 2022.

Total number of students and student weeks spent in major English language destinations



Source: BONARD, 2021; EduSA, 2021; English Australia, 2021; English New Zealand, 2021; English UK, 2021; Institute of International Education, 2021; Languages Canada, 2021; Marketing English in Ireland, 2021; NSO Malta, 2021; SEVIS, 2021

English language students by destination



Source: BONARD, 2021; Figures represent extrapolations based on multiple sources. They cover all centres in the destinations and represent the best possible calculation, rather than a headcount. Moreover, it should be noted that as of 2019, the statistics on New Zealand include continuing students as well as group students, who were not previously included. Therefore, direct comparisons with previous years might not be possible.

Student weeks by destination



Source: BONARD, 2021; Figures represent extrapolations based on multiple sources. They cover all centres in the destinations and represent the best possible calculation, rather than a headcount. Moreover, it should be noted that as of 2019, the statistics on New Zealand include continuing students as well as group students, who were not previously included. Therefore, direct comparisons with previous years might not be possible.