

2023

STUDENT STATISTICS REPORT

ENGLISH LANGUAGE STUDENTS IN THE UK IN 2022



BONARD

Executive summary

STUDENT STATISTICS REPORT 2023 – EXECUTIVE SUMMARY

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Prepared on behalf of:



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INTRODUCTION

These are the figures the industry has been waiting for, answering the crucial question as to how UK English language teaching (ELT) is recovering from the pandemic at a time when student mobility into the UK has been made harder for our biggest markets.

The pleasing news is the doubling of student weeks from 2021, with an “impressive” 320% rise in numbers. We have recovered 60% of our 2019 student weeks, and 51% of student numbers. Juniors are returning, up from 9% of students in 2021 to 49% last year. London is once more the top study destination, with Brighton and Manchester as the next two biggest cities and the South West of England the region experiencing the biggest growth.

I'm proud of what our industry has achieved in difficult circumstances: not only were we rebuilding, but unlike our competitors were doing so having made it harder for our biggest markets to come here. We are lobbying and will continue to lobby for tweaks to the UK immigration system to make it easier for junior groups and more attractive for other students.

Jodie Gray, Chief Executive, English UK

METHODOLOGY

The core data in this report was collated from English UK annual student data submissions returned between 2012 and 2022. English UK is the national membership association of accredited ELT centres in the UK. Its 300+ member centres are fully accredited by the British Council to teach English and they account for over 85% of the accredited ELT sector.

A descriptive note beneath each chart states the origin of the data.

Due care and attention were paid to align the annual data as much as possible. However, some of the figures in this 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. Where appropriate, we have therefore introduced historical comparisons based on the same research sample (only centres reporting in both 2021 and 2022, or 2019 and 2022);
- Traditionally centres have been asked to report only courses that take place face-to-face. For the last three years, to understand the impact of the pandemic, centres have been asked to report 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 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. Data on full-time students is used for most of the report. 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 2022, English UK's 329 member centres taught 225,641 full-time English language students, for a combined total of 973,716 student weeks.
- Total student weeks were more than double the 2021 figures (+111%), while student numbers showed an impressive 320% increase. This growth was driven mainly by the private sector. These figures do not reflect fluctuation in English UK membership.
- The year-on-year overall growth in student weeks was driven mainly by the fastest growing source markets: Argentina (+1,329%), Brazil (+567%), Italy (+502%) and Ukraine (+413%). China and Russia, traditionally key markets for UK ELT, sent fewer student weeks (-25% and -20%, respectively).
- From data from the 308 centres reporting in both 2019 and 2022, the sector has now recovered 60% of its 2019 student week volume and 51% of its student numbers. Across the membership the recovery rate was uneven, as 13% of providers exceeded their 2019 student weeks.
- Most students were taught face-to-face in 2022 (97%), exemplifying that, as pandemic-related travel restrictions reduced, the need for emergency remote modes of teaching delivery severely diminished.
- For the first time since the start of the pandemic, juniors returned in volume, making up 49% of all students, compared to only 9% in 2021.
- While in 2021 Northern England outperformed London as a top study destination, the capital was back as the top study destination in 2022, accounting for 29% of all student weeks.
- After London, the cities with the highest share of student weeks in 2022 were Brighton (9%), Manchester (9%), Bournemouth (8%) and Oxford (6%).
- In 2022, 93 English UK member centres taught part-time English language courses to an additional 11,913 students.

State Sector Member Centres

- The 34 state sector member centres taught 10,175 full-time English language students (a 22% decrease compared to 2021) and delivered a total of 95,077 student weeks (33% decrease fewer than in 2021). These percentage changes are absolute and do not reflect fluctuations in the size of the membership.
- From like-to-like data from the 32 state member centres reporting in both 2019 and 2022, on average student weeks have recovered to 35% and student numbers to 43% of pre-pandemic levels.
- Adults made up 97% of the state sector members' student weeks, a proportion similar to that observed in 2019 (98%).
- In contrast to the private sector, the state sector still had a sizeable proportion of students (32%) studying online.
- The average course of duration for adult students in 2022 was 9.6 weeks, dropping from a high in 2020 (11.6 weeks) to this lower than pre-pandemic average (of 10.9 weeks). In contrast, the average stay for junior students more than doubled (to 5.0 weeks).
- Despite a 36% drop in student weeks, China remained the top source market for the state sector (38%). China was followed by Saudi Arabia (9%), Romania (8%), Japan (5%) and Kuwait (4%).
- English UK's state sector members additionally taught 5,875 part-time English language students (+20% increase on 2021).

Private Sector Member Centres

- In 2022, the 295 private sector member centres collectively taught 215,466 full-time students (+430% increase compared to 2021) and delivered 878,639 student weeks (+174% increase on 2021). These percentage changes are absolute and do not reflect fluctuations in the size of the membership.
- From like-to-like data from the 274 private sector centres reporting in both 2019 and 2022, the average student week volume recovered to 66% of 2019 levels and their student numbers reached 52%.
- 41 private providers exceeded their 2019 student weeks (higher than 100% recovery), a further 24 experienced between 80% to 100% recovery but 99 providers saw recovery of less than 50% of their 2019 volumes.
- Juniors made a dramatic comeback in the private sector in 2022, making up 51% of all students (compared with 11% in 2021). 190 private sector centres ran ELT programmes for the junior segment, teaching a per member centre average of 581 students (50 centres in 2021).
- The average length of stay for adults and juniors combined was 4.1 weeks, another return to pre-pandemic norms from the longer durations encountered in recent years.
- For the second consecutive year, Saudi Arabia was the biggest source market for private sector members (15% of total student weeks). Traditionally strong Western European countries experienced a rebound: Italy (12%), Spain (6%), France (5%).

OVERALL DATA

ENGLISH UK MEMBERSHIP OVERVIEW

MARKET SIZE



329

REPORTING CENTRES

-10

VS 2021



225,641

STUDENTS

+317.2%

VS 2021



973,716

STUDENT WEEKS

+108.1%

VS 2021

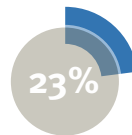
Source: English UK, 2022; year-on-year comparison is based on data from centres reporting in both 2021 and 2022 (n=316)

AGE SEGMENTS

MARKET SHARES



OF ALL STUDENTS WERE JUNIORS



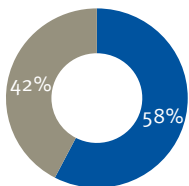
PROPORTION OF STUDENTS WEEKS SPENT BY JUNIORS

Source: English UK, 2022; n=329 member centres

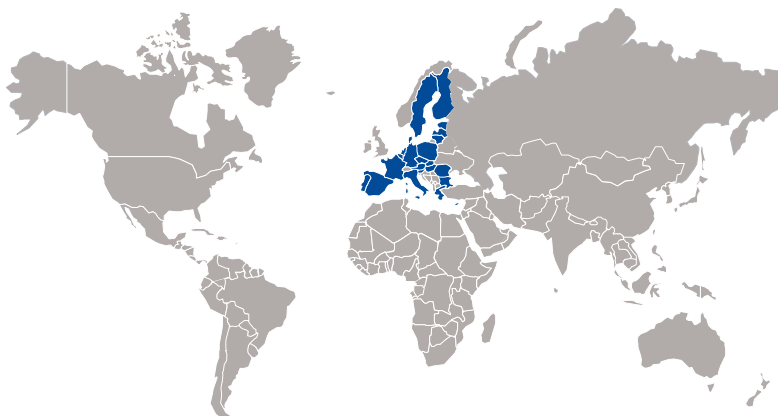
STUDENT ORIGIN

MARKET SHARES

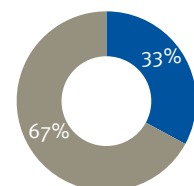
STUDENT NUMBERS



NON-EU EU



STUDENT WEEKS

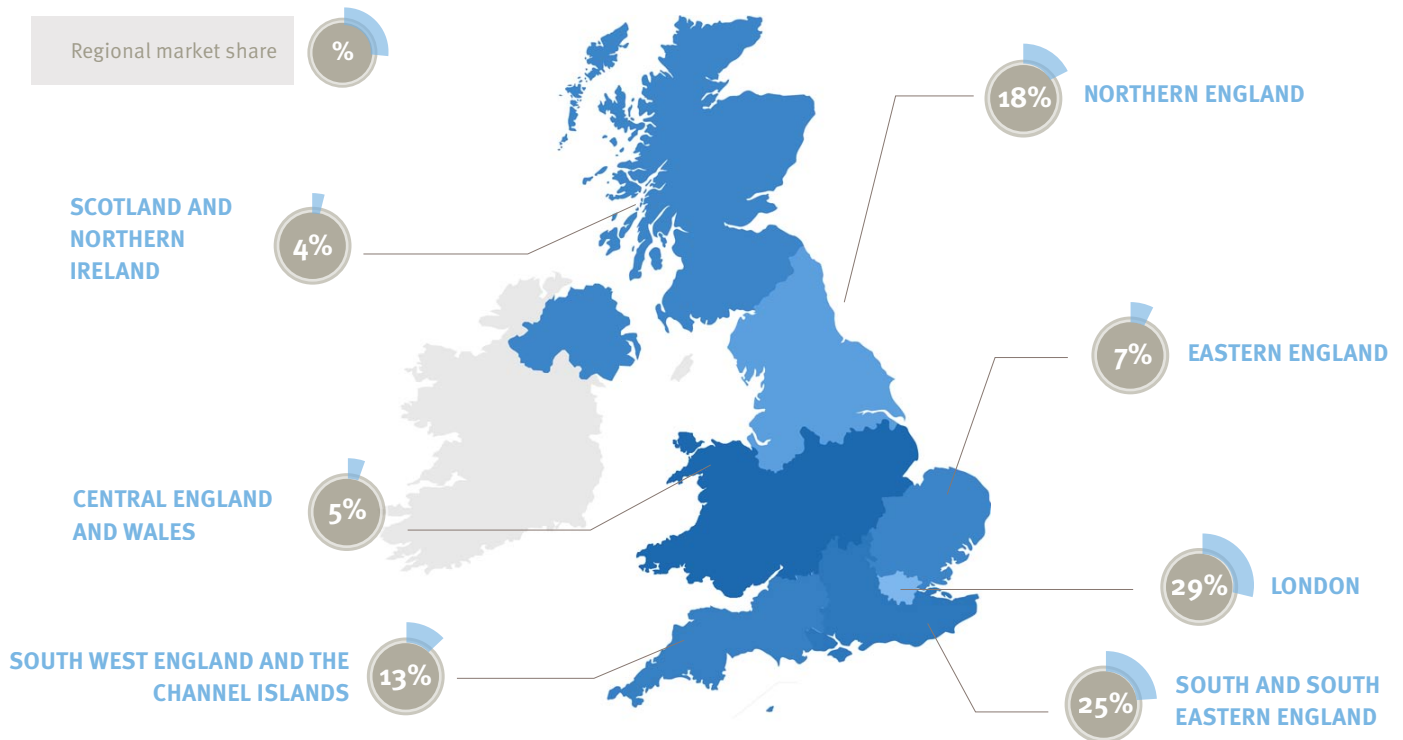


NON-EU EU

Source: English UK, 2022; n=329 member centres

REGIONAL OVERVIEW

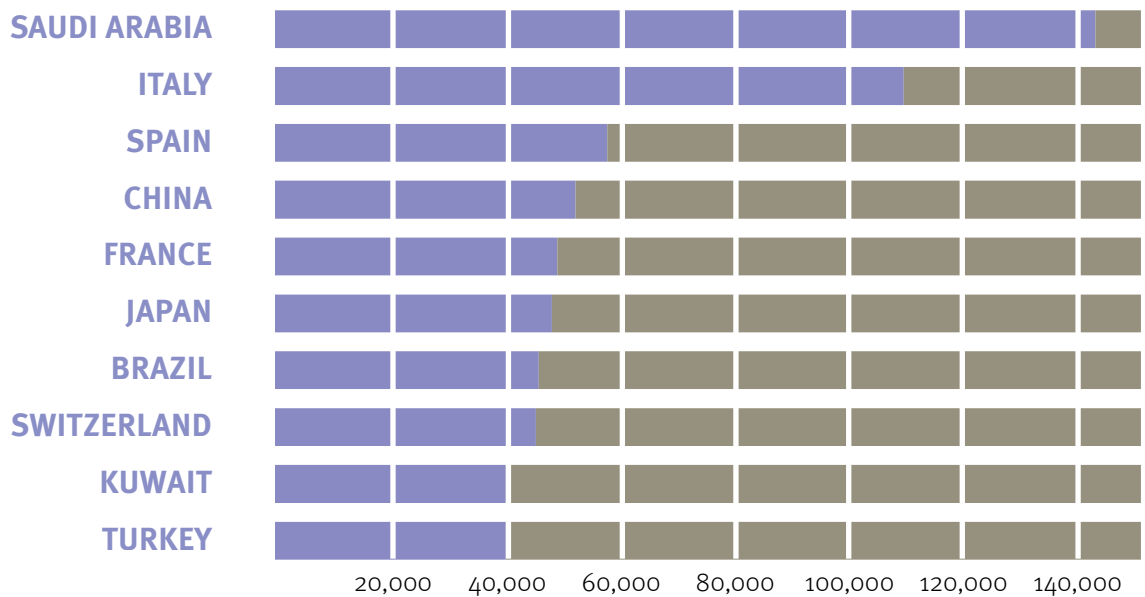
PERCENTAGE OF TOTAL STUDENT WEEKS



Source: English UK, 2022; n=329 member centres

TOP SOURCE MARKETS

STUDENT WEEKS



Source: English UK, 2022; n=329 member centres

STATE SECTOR

STATE SECTOR OVERVIEW

MARKET SIZE



34

REPORTING CENTRES

-7

VS 2021



10,175

STUDENTS

-21.2%

VS 2021



95,077

STUDENT WEEKS

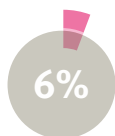
-32.8%

VS 2021

Source: English UK, 2022; year-on-year comparison is based on data from centres reporting in both 2021 and 2022
n=33 state sector member centres

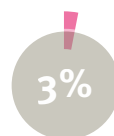
AGE SEGMENTS

MARKET SHARES



6%

OF ALL
STUDENTS
WERE JUNIORS
IN 2022



3%

PROPORTION OF
STUDENTS WEEKS
SPENT BY JUNIORS
IN 2022

Source: English UK, 2022; n=34 state sector member centres

AVERAGE LENGTH OF STAY

WEEKS

ADULTS



9.6

JUNIORS

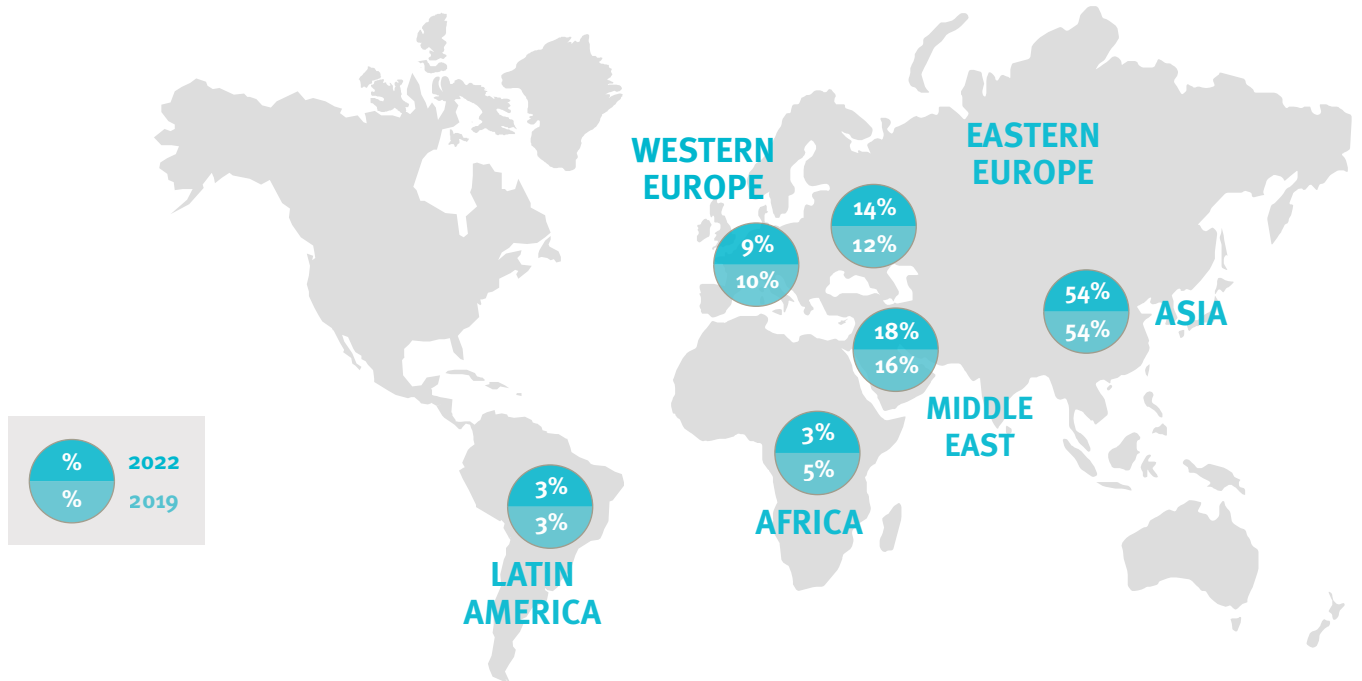


5.0

Source: English UK, 2022; n=34 state sector member centres

SOURCE REGIONS

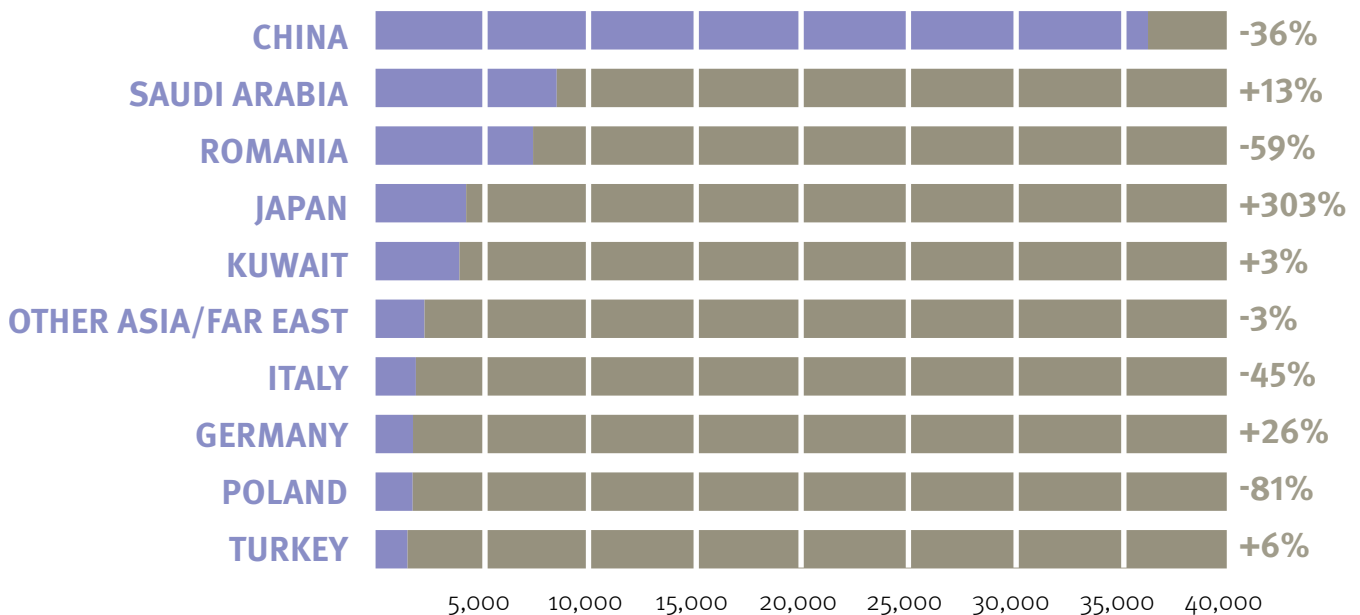
PERCENTAGE OF TOTAL STUDENT WEEKS



Source: English UK, 2022; a comparison of 2019 and 2022 figures does not reflect fluctuation in English UK membership; 2019 n=50 and 2022 n=34 state sector member centres

TOP SOURCE MARKETS

STUDENT WEEKS & YEAR-ON-YEAR CHANGE



Source: English UK, 2022; n=34 state sector member centres (y-o-y changes are based on a sample of 33 providers reporting in both 2021 and 2022 to provide a like-for-like comparison).

PRIVATE SECTOR

PRIVATE SECTOR OVERVIEW

MARKET SIZE



295

REPORTING CENTRES

-3

VS 2021



215,466

STUDENTS

+423.9%

VS 2021



878,639

STUDENT WEEKS

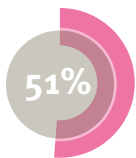
+169.2%

VS 2021

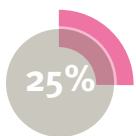
Source: English UK, 2022; year-on-year comparison is based on data from centres reporting in both 2020 and 2021 n=283 private sector member centres

AGE SEGMENTS

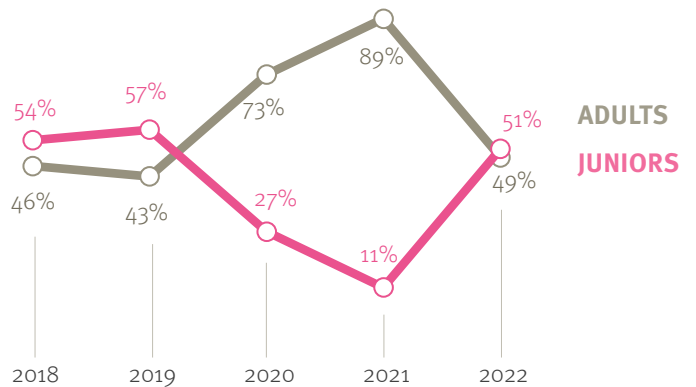
MARKET SHARES & HISTORIC TREND



OF ALL STUDENTS WERE JUNIORS IN 2022



PROPORTION OF STUDENTS WEEKS SPENT BY JUNIORS IN 2022



Source: English UK, 2022; the number of member centres fluctuated over the measured period, ranging between 360 and 295 private sector member centres

AVERAGE LENGTH OF STAY

WEEKS

ADULTS



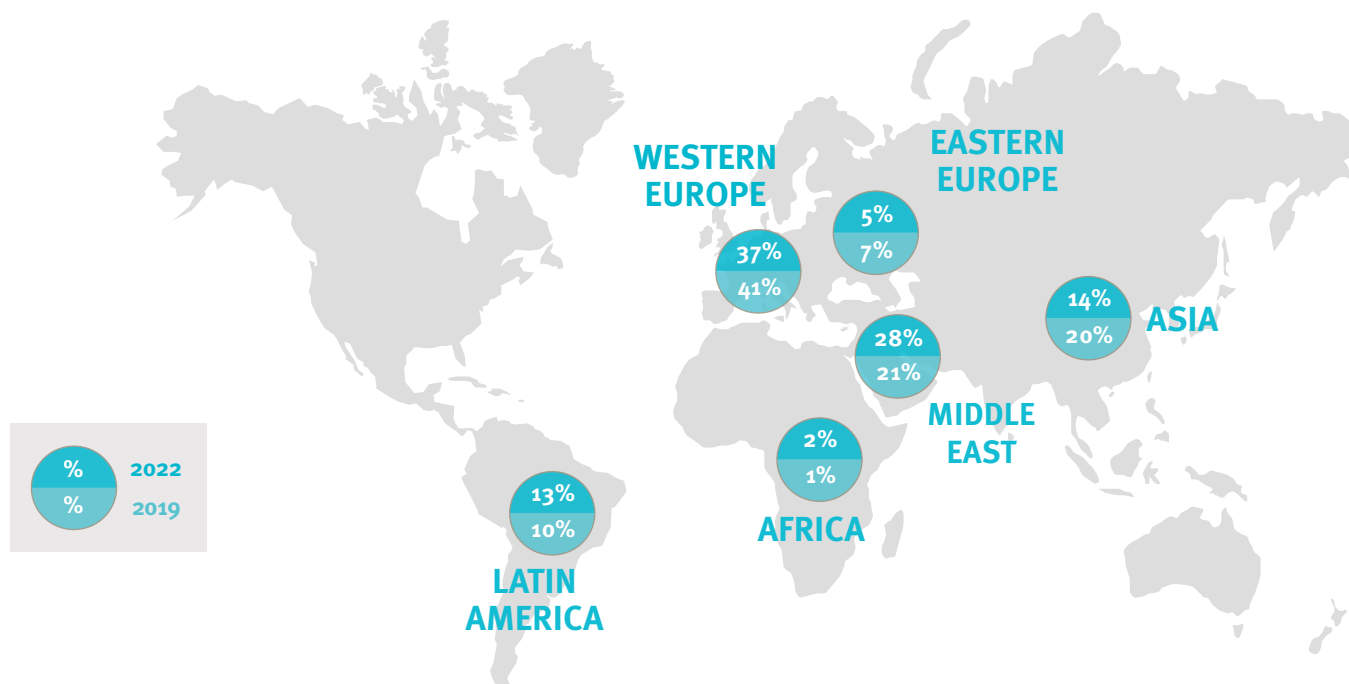
JUNIORS



Source: English UK, 2022; n=295 private sector member centres

SOURCE REGIONS

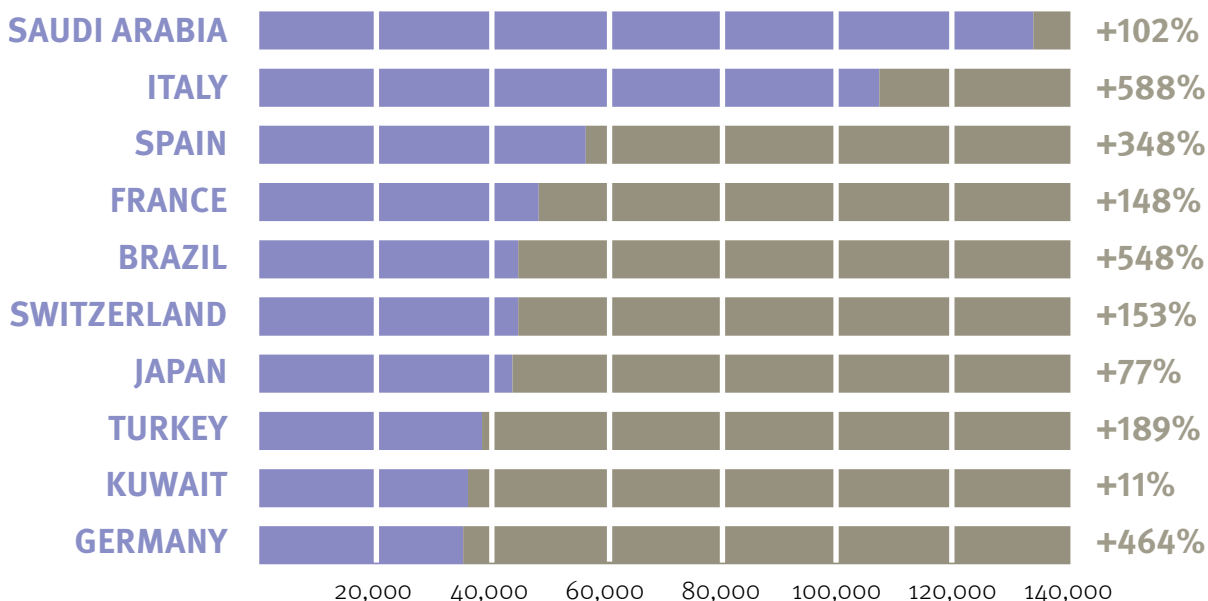
PERCENTAGE OF TOTAL STUDENT WEEKS



Source: English UK, 2022; a comparison of 2019 and 2022 figures does not reflect fluctuation in English UK membership, 2019 n=358 and 2022 n=295 private sector member centres

TOP SOURCE MARKETS

STUDENT WEEKS & YEAR-ON-YEAR CHANGE



Source: English UK, 2022 n=295 private sector member centres (y-o-y changes are based on a sample of 281 providers reporting in both 2021 and 2022 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



329

REPORTING CENTRES



11,913

STUDENTS



106,340

STUDENT WEEKS

PART-TIME STUDENT NUMBERS



5,875

STATE SECTOR

6,038

PRIVATE SECTOR

PART-TIME STUDENT WEEKS



56,175

STATE SECTOR

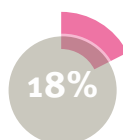
50,165

PRIVATE SECTOR

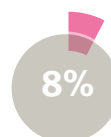
Source: English UK, 2022; n=329 member centres (n=295 private sector members and n=34 state sector members)

AGE SEGMENTS

MARKET SHARES



OF ALL PART-TIME STUDENTS WERE JUNIORS IN 2022



PROPORTION OF PART-TIME STUDENTS WEEKS SPENT BY JUNIORS IN 2022

Source: English UK, 2022; n=329 member centres

