



# Student Statistics Report 2020

ENGLISH LANGUAGE STUDENTS IN THE UK IN 2019

05/2020

Executive Summary



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# STUDENT STATISTICS REPORT 2020 – EXECUTIVE SUMMARY

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**Prepared on behalf of:**



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# INTRODUCTION

In this time of uncertainty, robust market intelligence will enable us to make the well-informed, innovative and brave business decisions which will face us well into next year.

This report – the sixth with our insight partner BONARD – offers sophisticated evaluation of the UK's ELT sector source markets in 2019, set in the broader global market context. This is also our most comprehensive report to date, shining a light for the first time on part-time students and their choices alongside a range of trends and insights.

We believe these are the most comprehensive statistics published by any of the world's language teaching associations, and will continue to improve them so that we and our members can be confident of making the best possible decisions. The cooperation of our members is essential for creating a report at this level of detail, and as always, we are grateful to every one of them.

In the months to come, student statistics and market insights will be among the essential tools provided to members by English UK as we rise to our biggest challenge to date: to rebuild and thrive.

# METHODOLOGY

The core data in this report was collated from English UK annual student data submissions returned between 2009 and 2019.

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. Where appropriate, we have therefore introduced historical comparisons based on the same research sample (only centres reporting in both 2018 and 2019).
- Not all English UK 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 providers is always noted below the respective chart.

**Note:** A student week is defined as one student taking 10 or more teacher-taught hours in one 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](http://www.englishuk.com/resources-and-reports/uk-elt-data)

For other stakeholders, media and interested parties, please contact Jodie Gray, Interim Chief Executive, at [Jodie.Gray@englishuk.com](mailto:Jodie.Gray@englishuk.com).

# KEY FINDINGS

## General Overview

- In 2019, the UK welcomed 1% more English language students than in 2018. Overall, 508,614 international students chose an English UK member centre as their place of study. This growth occurred despite the member base declining by four centres.
- In addition, 24,416 part-time students enrolled at English UK member centres.
- Student weeks dropped for the second consecutive year, to a total of 1,839,655 weeks (a y-o-y decrease of 1.5%); however, a comparison of data from centres reporting in both 2018 and 2019 shows that the market remained flat.
- Junior students represented 54% of all students.
- One in four weeks were spent in London, which had the highest share of all UK regions. The best performing region was Northern England, which increased by 9%, or 25,877 weeks. Percentage-wise, 2019 also proved to be a positive year for Central England, which enjoyed a 21% bump in student weeks.
- EU students comprised 57% of all learners at English UK member centres. At the same time, non-EU countries produced 65% of all student weeks.

## State Sector Member Centres

- Fifty-four state member centres hosted 34,066 students and delivered 334,299 student weeks. Comparing the figures with those of the previous year, student week volume increased by 8.4%, yet student numbers fell by 2.1%.
- Of students attending higher education and further education institutions, 12% were juniors, who spent 2% of all student weeks in the sector.
- Adult students' average length of stay was 10.9 weeks, whereas the junior segment stayed for an average of two weeks (a slight decrease from 2.1 weeks in 2018).
- The top five sending markets for the state sector were China (41.2% of student weeks), Saudi Arabia (5.9%), Japan (5.5%), Romania (4.7%) and Poland (3.9%).
- In addition, 6,689 part-time students enrolled at English UK state sector member centres.

## Private Sector Member Centres

- The private sector accounted for 474,548 students, who spent a total of 1,505,356 weeks. Compared to the state sector, the private sector recorded an opposing trend: although student numbers grew by 1%, student weeks dropped by 3%.
- The under-18 age band comprised 57% of all students and 33% weeks in the sector. Meanwhile, an average of 1,024 junior learners were hosted per centre, an increase of 9% over 2018.
- Similar to the trend seen in the previous year, adult students' average length of stay continued to decline, reaching 4.9 weeks. In the case of juniors, course duration averaged 1.8 weeks (no change).
- In 2019, the top largest source countries constituted 47% of all weeks spent in private sector centres, namely Italy (16.7% of student weeks), Saudi Arabia (11.7%), Spain (6.9%), China (6.6%) and France (5.5%).
- In addition, 17,727 part-time students were enrolled at English UK private sector member centres.

# OVERALL DATA

## ENGLISH UK MEMBERSHIP OVERVIEW

## MARKET SIZE



413

REPORTING CENTRES

-6

VS 2018



508,614

STUDENTS

+1.2%

VS 2018



1,839,655

STUDENT WEEKS

0%

VS 2018

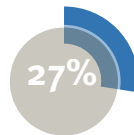
Source: English UK, 2019; year-on-year comparison is based on data from centres reporting in both 2018 and 2019

## AGE SEGMENTS

## MARKET SHARES



OF ALL STUDENTS WERE JUNIORS



PROPORTION OF STUDENTS WEEKS SPENT BY JUNIORS

Source: English UK, 2019; n=413 member centres

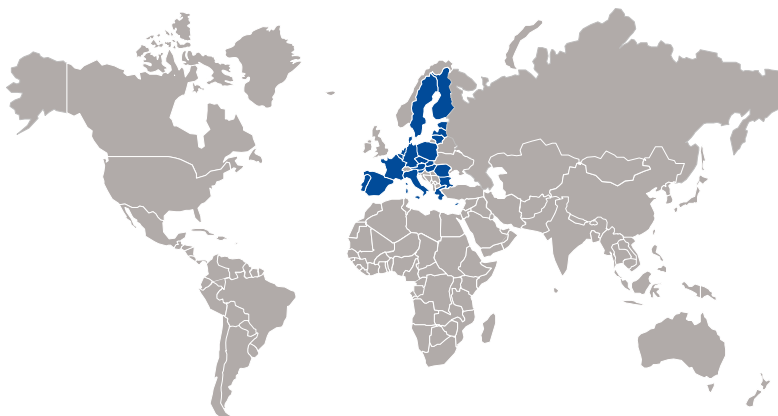
## STUDENT ORIGIN

## MARKET SHARES

STUDENT NUMBERS



NON-EU EU



STUDENT WEEKS

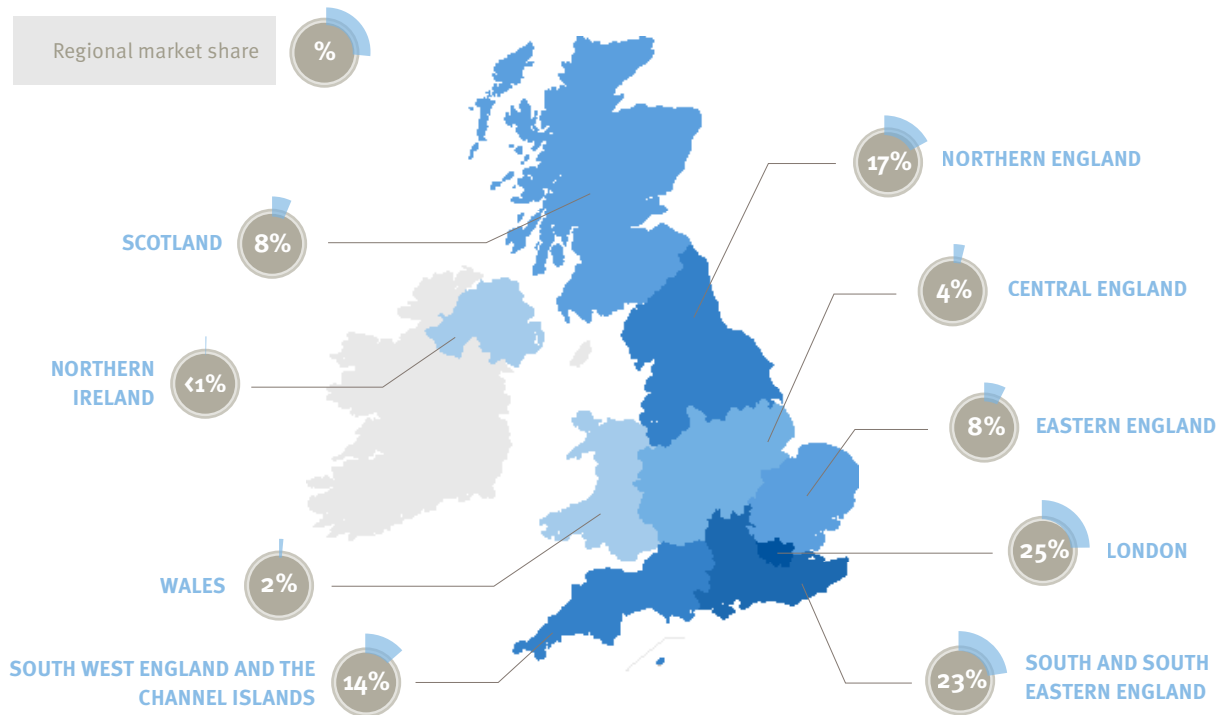


NON-EU EU

Source: English UK, 2019; n=408 member centres

## REGIONAL OVERVIEW

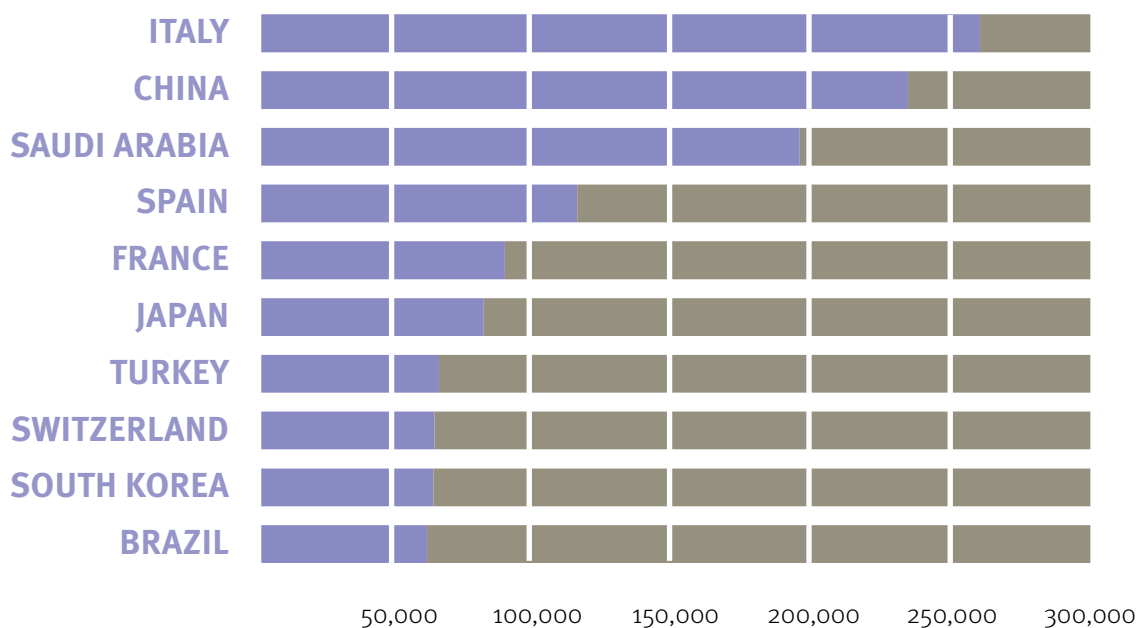
## PERCENTAGE OF TOTAL STUDENT WEEKS



Source: English UK, 2019; n=413 member centres

## TOP SOURCE MARKETS

## STUDENT WEEKS



Source: English UK, 2019; n=408 member centres

# STATE SECTOR

## STATE SECTOR OVERVIEW

## MARKET SIZE



54

REPORTING CENTRES

-5  
VS 2018



34,066

STUDENTS

+7.4%  
VS 2018



334,299

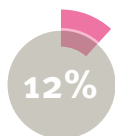
STUDENT WEEKS

+15.7%  
VS 2018

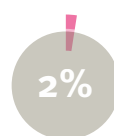
Source: English UK, 2019; year-on-year comparison is based on data from centres reporting in both 2018 and 2019

## AGE SEGMENTS

## MARKET SHARES



OF ALL  
STUDENTS  
WERE JUNIORS



PROPORTION OF  
STUDENTS WEEKS  
SPENT BY JUNIORS

Source: English UK, 2019; n=54 state sector member centres

## AVERAGE LENGTH OF STAY

## WEEKS

ADULTS



10.9

JUNIORS

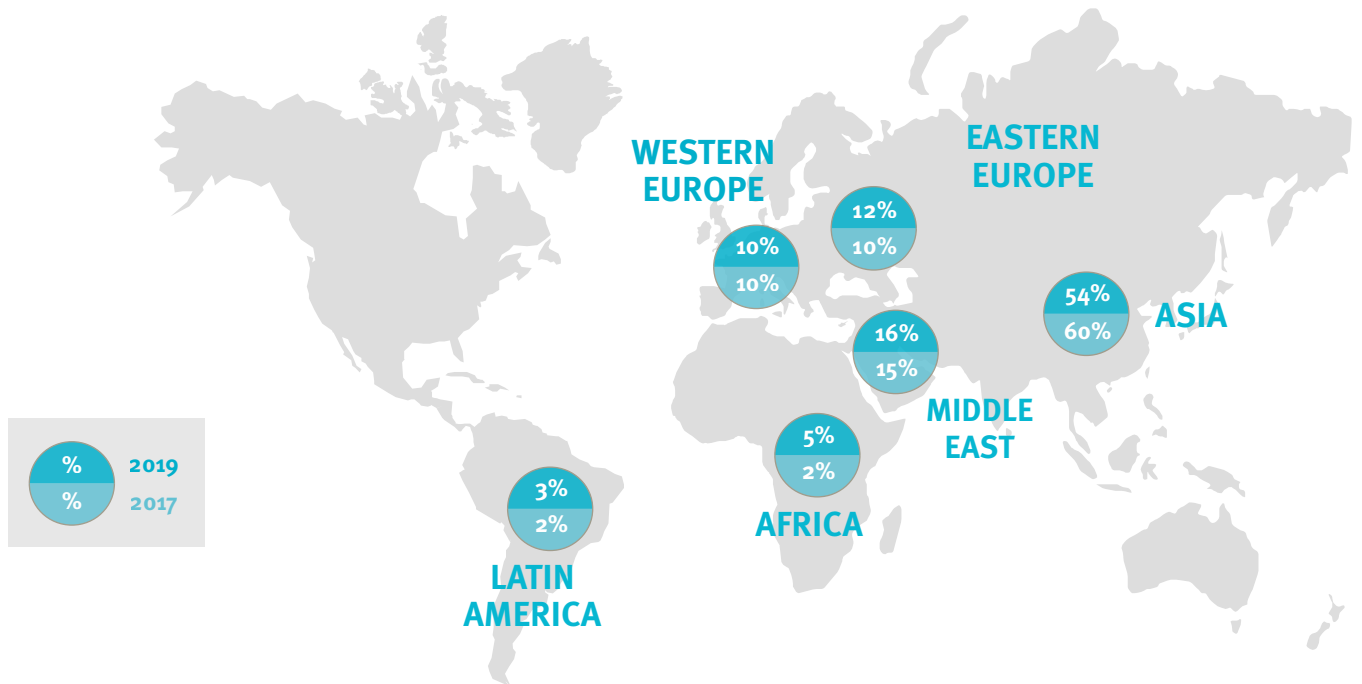


2.0

Source: English UK, 2019; n=54 state sector member centres

## SOURCE REGIONS

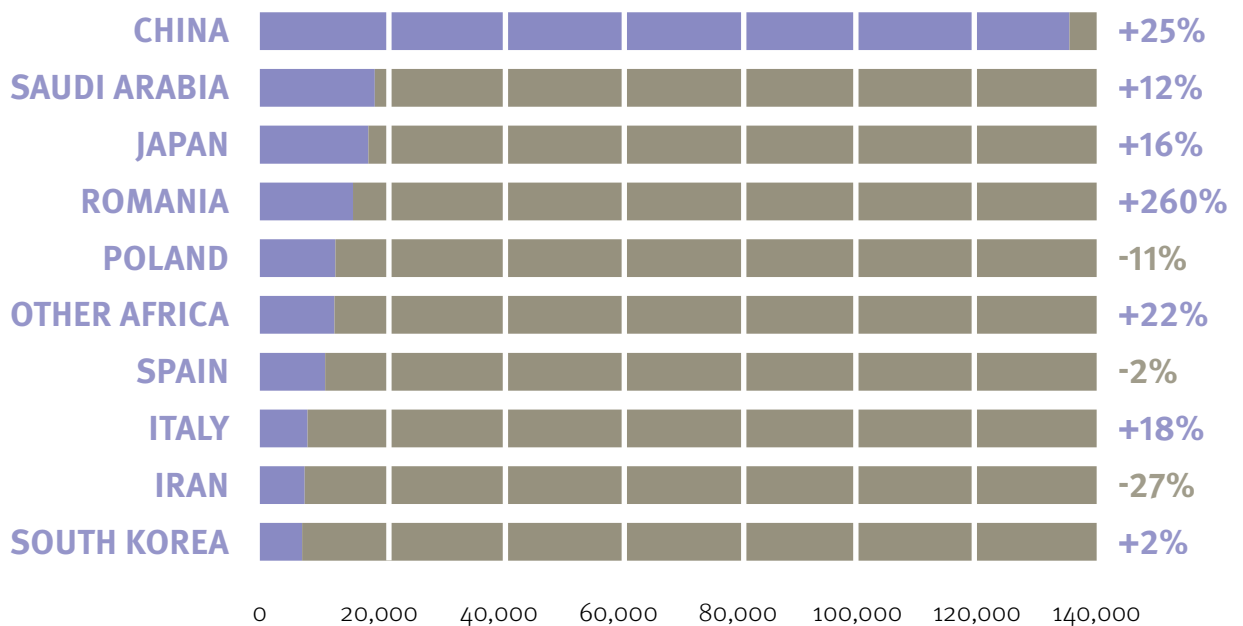
## PERCENTAGE OF TOTAL STUDENT WEEKS



**Source:** English UK, 2019; a comparison of 2017 and 2019 figures does not reflect fluctuation in English UK membership

## TOP SOURCE MARKETS

## STUDENT WEEKS & YEAR-ON-YEAR CHANGE



**Source:** English UK, 2019; n=50 state sector member centres (y-o-y changes are based on a sample of 45 providers reporting in both 2018 and 2019 to provide a like-for-like comparison).



# PRIVATE SECTOR

## PRIVATE SECTOR OVERVIEW

## MARKET SIZE



359

REPORTING CENTRES

-1

VS 2018



474,548

STUDENTS

+0.7%

VS 2018



1,505,356

STUDENT WEEKS

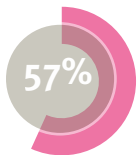
-2.9%

VS 2018

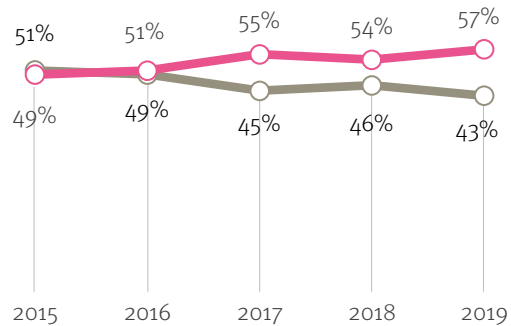
Source: English UK, 2019; year-on-year comparison is based on data from centres reporting in both 2018 and 2019

## AGE SEGMENTS

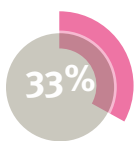
## MARKET SHARES & HISTORIC TREND



OF ALL STUDENTS WERE JUNIORS



ADULTS  
JUNIORS



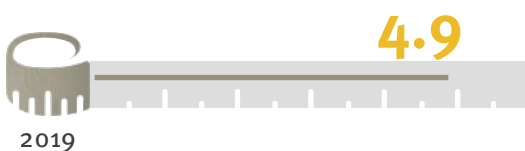
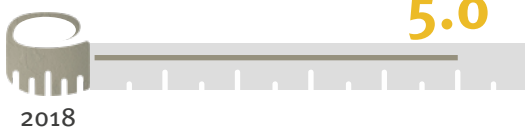
PROPORTION OF STUDENTS WEEKS SPENT BY JUNIORS

Source: English UK, 2019; the number of member centres fluctuated over the measured period

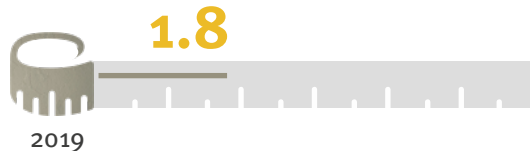
## AVERAGE LENGTH OF STAY

## WEEKS

ADULTS



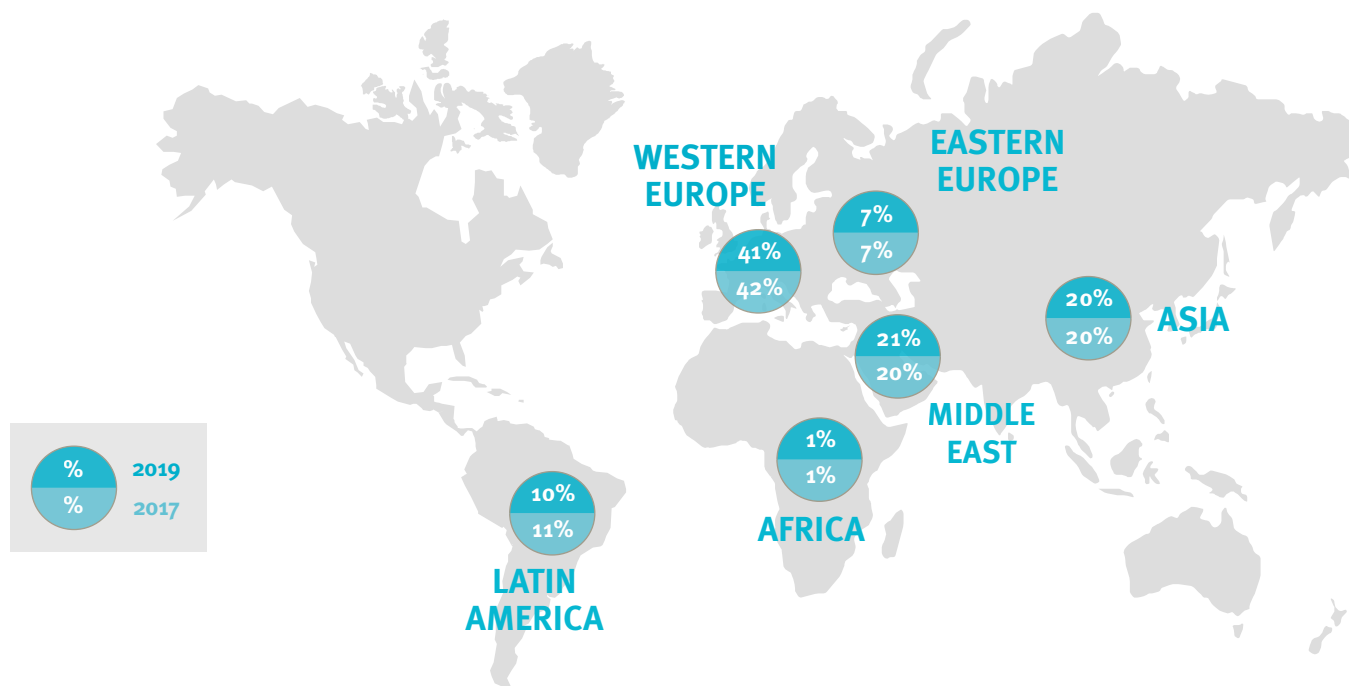
JUNIORS



Source: English UK, 2019; 2019 n=359 and 2018 n=360 private sector member centres

## SOURCE REGIONS

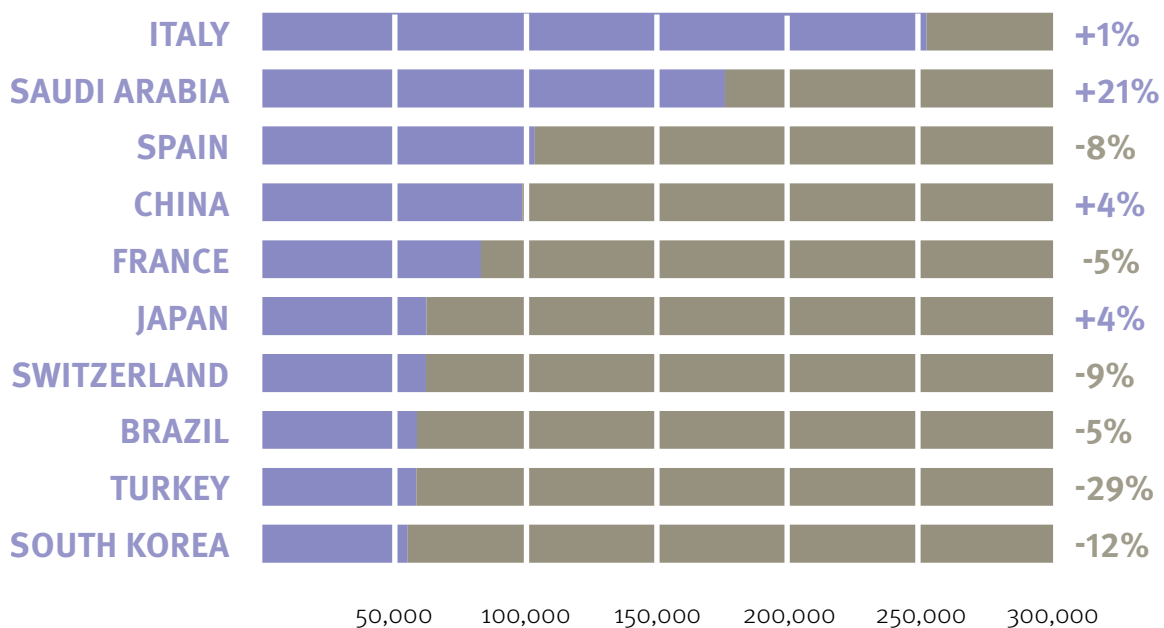
## PERCENTAGE OF TOTAL STUDENT WEEKS



**Source:** English UK, 2019; a comparison of 2017 and 2019 figures does not reflect fluctuation in English UK private sector membership

## TOP SOURCE MARKETS

## STUDENT WEEKS & YEAR-ON-YEAR CHANGE



**Source:** English UK, 2019 (y-o-y changes are based on a sample of 344 providers reporting in both 2018 and 2019 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



359

REPORTING CENTRES



24,416

STUDENTS



165,474

STUDENT WEEKS

## PART-TIME STUDENT NUMBERS



6,689

STATE SECTOR

17,727

PRIVATE SECTOR

## PART-TIME STUDENT WEEKS



91,114

STATE SECTOR

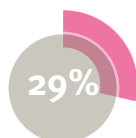
74,360

PRIVATE SECTOR

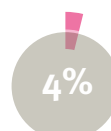
Source: English UK, 2019; n=359 member centres

## AGE SEGMENTS

## MARKET SHARES



OF ALL PART-TIME STUDENTS WERE JUNIORS



PROPORTION OF PART-TIME STUDENTS WEEKS SPENT BY JUNIORS

Source: English UK, 2019; n=107 member centres



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