

THE UK IN THE GLOBAL CONTEXT

The global ELT sector faced unprecedented change in 2020. In the first year of the pandemic, global student numbers fell by 70% and student weeks by 56% on 2019 figures.

While in 2019 the sector saw a total of 1.4 million students spending 9.9 million weeks studying English, in 2020 student numbers plummeted to 414,153 and student weeks to 4,366,297.

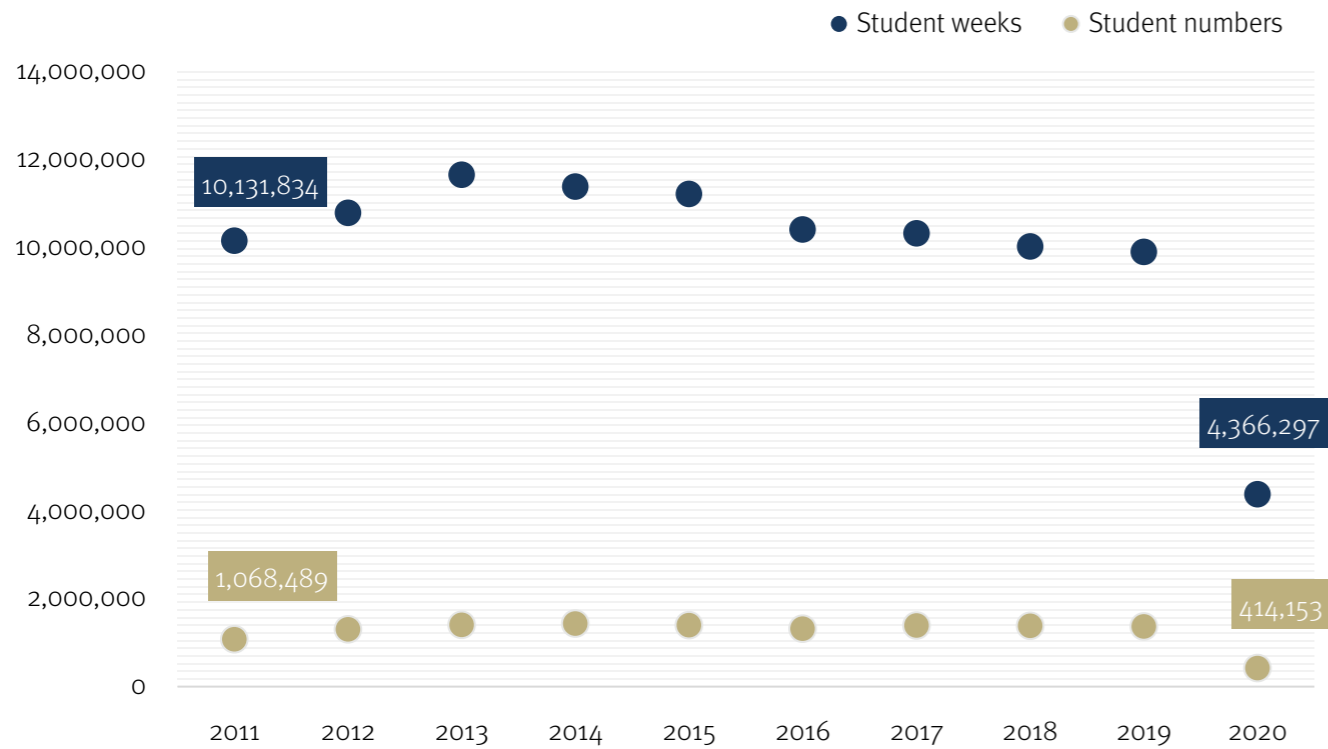
However, the experience of the pandemic crisis varied across destinations. The UK and Malta suffered the most significant year-on-year decline in 2020, with student numbers falling by 84% and 80%, respectively, and student weeks by 71% and 79%.

In absolute numbers, the UK still hosted the largest number of students in 2020; however, it also saw the steepest decline among all destinations.

While in 2019 the ELT industry in the UK accounted for 23% of global student weeks and 43% of international student numbers, these proportions fell to 15% and 23%, respectively, in 2020.

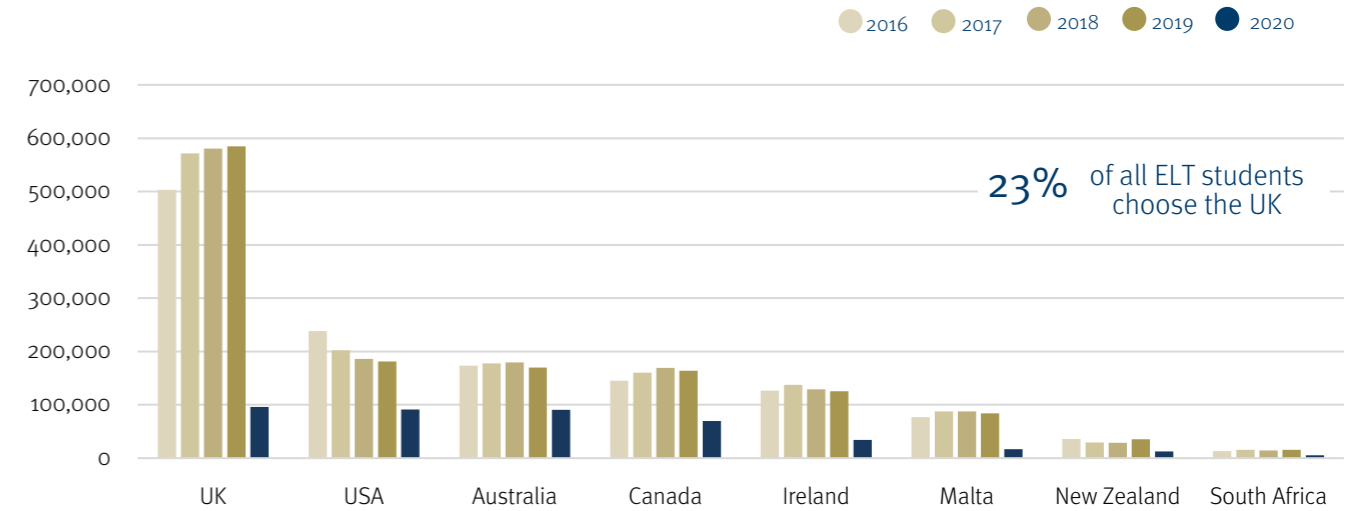
At the other end of the scale, Australia, while still suffering considerable losses, had the lowest year-on-year change of all destinations: 47% in student weeks and 47% in student numbers, both below the global average.

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



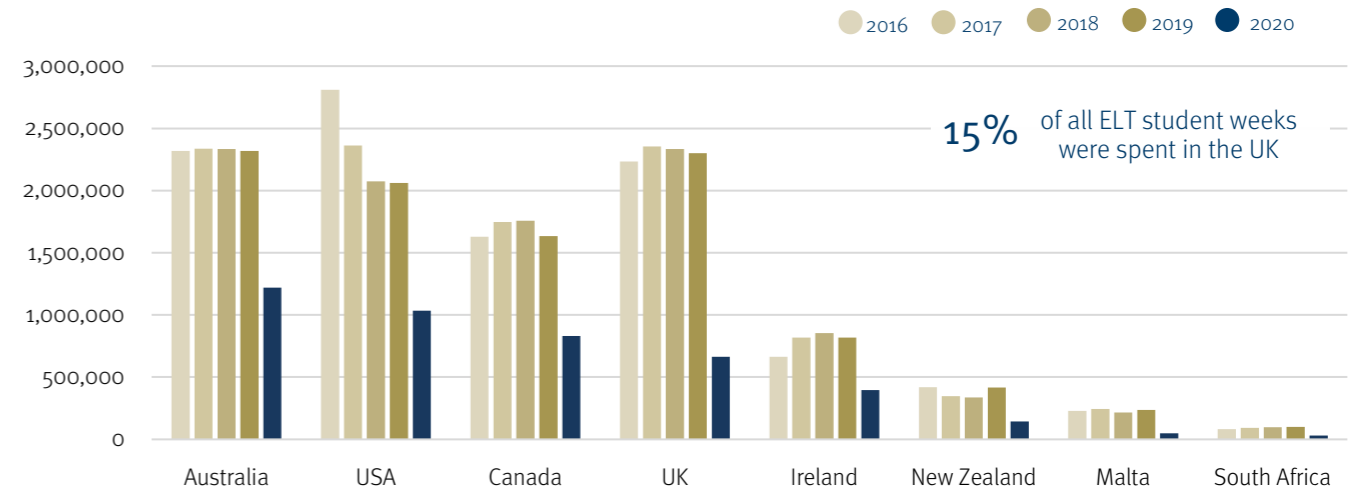
Source: BONARD, 2021; EduSA, 2021; English Australia, 2021; English New Zealand, 2021; English UK, 2021; Institute of International Education, 2021; Languages Canada, 2021; Marketing English in Ireland, 2021; NSO Malta, 2021; SEVIS, 2021

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.