ENGLISH UK

Student Statistics Report 2020

ENGLISH LANGUAGE STUDENTS IN THE UK IN 2019

05/2020

STUDENT STATISTICS REPORT 2020

Prepared on behalf of:

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TABLE OF CONTENTS

FOREWORD

The publication of our 2019 student statistics report several months into the Covid-19 crisis may seem less than timely. But as we work together to rebuild UK English language teaching after the Covid-19 crisis, rigorous, granular statistical information and analysis is essential to inform and support everything we do.

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.

Jodie Gray
Interim Chief Executive
English UK

As English UK's insight partner, we are delighted to continue our collaboration in drawing up the annual report for the UK English Language Teaching (ELT) sector. The current release marks the sixth edition.

The rebound we saw in 2017 appears to have laid the foundation for incremental increases in student numbers in the years to come. Since then, the UK has proven its attractiveness as a study destination as well as its readiness in terms of capacity to host a growing number of English language learners, fuelled by the junior segment in particular. At the same time, the decreasing length of stay poses a systematic challenge to the future of UK ELT. Private sector members are increasingly exposed to students' preference for programmes with a shorter course duration, finding themselves caught up in a debate with customers to justify the time spent in an immersive environment and the essential added value it offers. Meanwhile, the state sector, where student motivation tends to be more related to academic achievement, is enjoying a more favourable trend in this regard.

To assist UK ELT providers in the coming few years, we have enhanced the report by extending our measurements to part-time students. This leads to far greater insight into and understanding of the sector, while also placing the UK at the forefront of other destinations with regards to collating statistics on student types by tuition mode.

Furthermore, we understand that granularity of data matters. Therefore, the research team has incorporated a number of new regional overviews, to pinpoint local trends. By having access to nationality breakdowns in each major UK region, providers are able to refer to more meaningful benchmarks.

We hope you will find the contents of this report useful and wish you all the best in the future endeavours informed by the findings presented below. While the report relates to the 2019 calendar year, we continue monitoring and measuring the market in light of the new reality, when reliable intelligence is twice as precious.

Samuel Vetrak
CEO
BONARD

METHODOLOGY

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

Each chart contains a descriptive note underneath to state the origin and provenance of its data.

Due care and attention were paid to align the annual data as much as possible. Notwithstanding, 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 2018 and 2019).
- Not all English UK 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 state sector providers is always noted below the respective chart or table.

Note: A student week is defined as one student taking 10 or more teacher-taught hours in one week.

EXECUTIVE SUMMARY

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.

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%).
- English UK private sector members also catered to 17,727 part-time students.

GENERAL OVERVIEW

THE UK AT A GLANCE

The data reported within this section refers to full-time English language students. Information on part-time students, which was newly-added in this year's edition, can be found on pages 32 and 33.

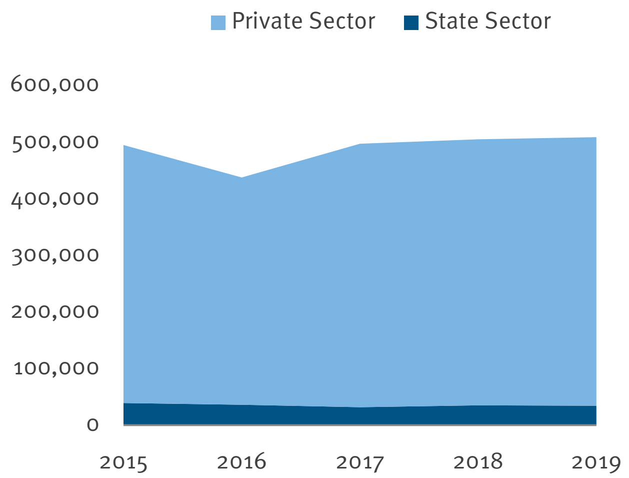
The 2019 English UK membership comprised 415 centres; the current report builds on data provided by 413 of them.

For the third year in a row, English UK centres welcomed a growing number of English language students in 2019.

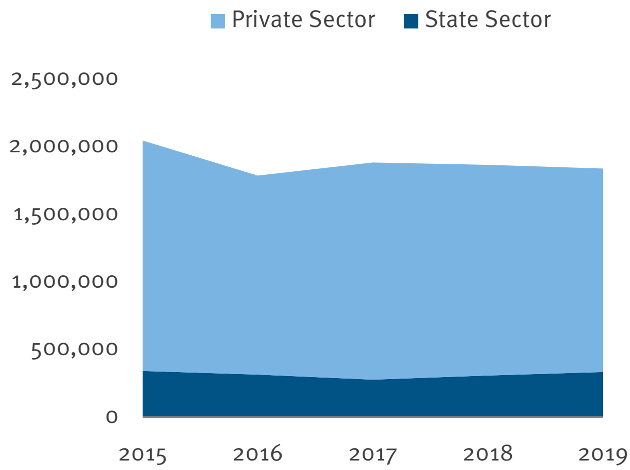
Overall, the membership counted 508,614 international students, which marked a y-o-y increase of 1% – mostly thanks to a rise in the number of English language students attending private sector member centres.

Chart 1: Overall number of students (2015-2019) and student weeks (2015-2019) taught by English UK member centres

STUDENT NUMBERS



STUDENT WEEKS

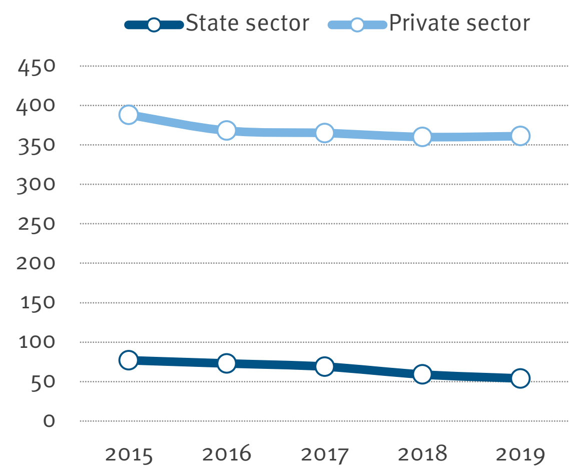


Note: The number of member centres fluctuated over the measured period. Please see Chart 2 for more details.
Source: English UK, 2015-2019

Unadjusted figures, which do not factor in incoming and outgoing English UK members, indicate that student weeks continued to decline in 2019, by 1.5%. State and private sector member centres experienced contradictory developments.

Whilst the state sector catered to fewer students than in the previous year, the students spent 8.4% more weeks in their courses. Meanwhile, the private sector managed to grow in numbers by 1%, but students spent less time studying English in the UK, resulting in a 3% lower student week volume.

Chart 2: Number of English UK member centres by sector



Source: English UK, 2015-2019

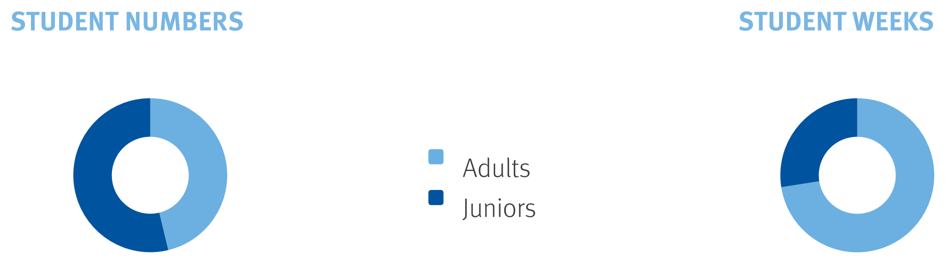
An analysis of member centres in both 2018 and 2019 was conducted to offset the fluctuations in English UK membership and to provide a more accurate insight into y-o-y performance.

The results confirm a 1% increase in student numbers in real terms but also point to a stable performance in terms of student weeks.

Table 1: Like-to-like comparison of 2019 vs 2018

	Student numbers	Student weeks
2018 (n=398)	495,034	1,822,026
2019 (n=398)	500,728	1,822,232
Change (%)	+1.2%	0.0%

Chart 3: Share of adults and juniors out of the total number of students and student weeks taught by English UK member centres



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

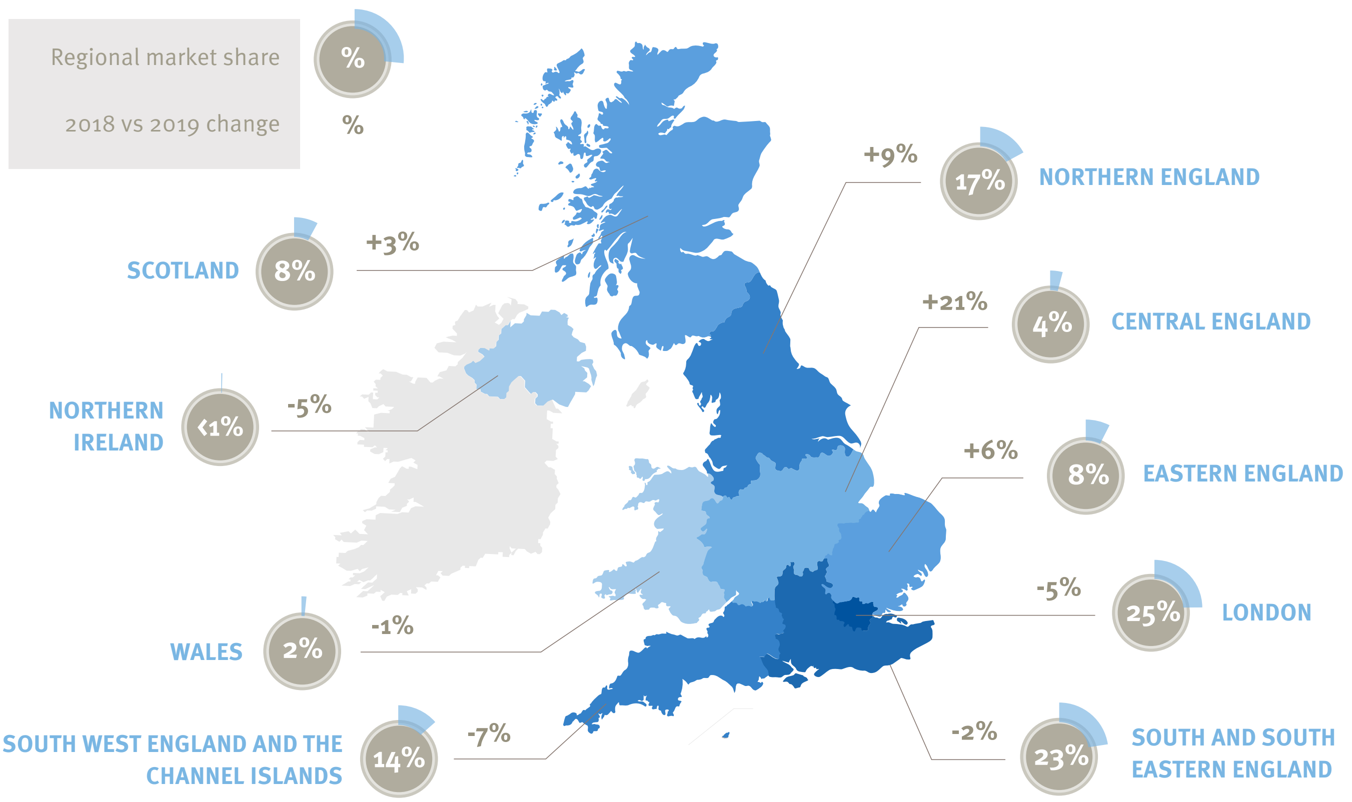
Junior student weeks climbed by 6%, to 505,395 and, consequently, increased their share at member centres from 25% in 2018 to 27% in 2019.

Adult learners generated 1,334,260 student weeks, a decrease of 4% over 2018. The student headcount, too, declined by 5%.

GENERAL OVERVIEW

REGIONAL OVERVIEW

Chart 4: Regional market share (student weeks, 2019) and 2018 vs 2019 change in student weeks



Source: English UK, 2019; n=413 members; y-o-y comparison based on 398 reporting centres.

Note: Percentages do not add up to 100% due to rounding. As with last year, in the case of seasonal multi-centres or year-round providers with separate seasonal provision, data was attributed according to the location of the headquarters; that is, for logistical reasons, statistical declarations of annual returns are on a membership basis rather than for each individual teaching premise location. The results per region might, therefore, be distorted.

London continued to attract the majority of English language students, representing 25% of all reported student weeks. With a share of 23%, South & South Eastern England was the second most popular destination within the UK.

The biggest gains were reported in Northern England, which increased by 9%, or 25,877 student weeks. Central England constituted the fastest-growing region percentage-wise (attracting 21%, or 13,070 more weeks).

On the other hand, South West England & the Channel Islands recorded the highest y-o-y decrease (7%), followed by London and Northern Ireland (at 5% each).

GENERAL OVERVIEW

TOP SOURCE MARKETS

Table 2: Student weeks, students and average length of stay (weeks) by source market (rank by student weeks)

Rank	Country	Student weeks (2018)	Student weeks (2019)	Share (%, 2019)	Student numbers (2018)	Student numbers (2019)	Share (%, 2019)	Average length of stay (2019)
1	Italy	258,064	260,043	14.2%	127,972	135,089	26.6%	1.9
2	China	204,225	234,066	12.8%	47,372	51,460	10.1%	4.5
3	Saudi Arabia	164,892	194,833	10.6%	18,974	19,565	3.9%	10.0
4	Spain	122,850	114,358	6.2%	46,750	48,461	9.5%	2.4
5	France	89,525	88,174	4.8%	35,812	33,630	6.6%	2.6
6	Japan	78,568	80,484	4.4%	14,396	15,443	3.0%	5.2
7	Turkey	87,072	64,343	3.5%	14,518	10,056	2.0%	6.4
8	Switzerland	70,501	62,721	3.4%	17,006	15,879	3.1%	3.9
9	South Korea	70,898	62,284	3.4%	7,700	7,183	1.4%	8.7
10	Brazil	63,837	60,077	3.3%	13,955	13,338	2.6%	4.5
11	Germany	60,301	55,707	3.0%	31,374	30,479	6.0%	1.8
12	Russia	46,357	53,824	2.9%	17,808	21,330	4.2%	2.5
13	Thailand	30,768	32,274	1.8%	4,975	5,132	1.0%	6.3
14	Kuwait	33,234	29,150	1.6%	3,351	3,276	0.6%	8.9
15	Colombia	31,410	27,363	1.5%	3,145	2,544	0.5%	10.8
16	Oman	25,880	26,861	1.5%	3,366	3,294	0.6%	8.2
17	Poland	32,489	26,021	1.4%	6,635	6,646	1.3%	3.9
18	Taiwan	27,256	25,454	1.4%	4,513	4,825	1.0%	5.3
19	Romania	7,676	18,869	1.0%	1,628	2,175	0.4%	8.7
20	Argentina	24,576	18,618	1.0%	7,883	5,924	1.2%	3.1

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

With 260,043 student weeks, Italy remained the UK's most represented market in 2019. Next were China (234,066) and Saudi Arabia (194,833), highlighting the increasing contribution of non-EU countries to the overall student week figure.

From a macro-level point of view, the share of student nationalities at English UK member centres continues to change. In addition to the considerable growth posted by China and Saudi Arabia, other Asian and Middle Eastern countries such as Japan, Thailand and Oman increased their number of student weeks. On the other hand, most European markets, which include Spain, France, Germany and Switzerland, declined in terms of student weeks.

All major Latin American countries, too, registered decreases in both student numbers and weeks.

It is also worth mentioning that Russia experienced another year of growth, while the robust growth seen in numbers from Romania was thanks only to a considerable increase in student intake in one particular state sector member centre.

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, thanks to their average length of stay being considerably longer than that of EU students (5.4 weeks compared to 2.2 weeks).

GENERAL OVERVIEW

TOP SOURCE MARKETS

In order to provide more granular data, this report introduces a more detailed regional analysis. The overview below provides a better understanding of top student nationalities in each UK region.

Table 3: Top source countries by UK region (state sector, student weeks)

Rank	Central England and Wales n=13		Eastern England n=4		London n=6		Northern England n=13	
1	China	39,282	Romania	14,397	China	10,981	China	76,172
2	Saudi Arabia	5,171	China	2,387	Japan	1,770	Saudi Arabia	11,035
3	South Korea	1,252	Poland	1,114	Saudi Arabia	1,289	Japan	5,485
4	Japan	1,002	Spain	930	Thailand	1,111	Kuwait	3,906
5	Taiwan	732	Panama	804	Taiwan	889	South Korea	3,854
6	Italy	562	Italy	404	South Korea	676	Turkey	3,495
7	Thailand	513	South Korea	372	Italy	636	Thailand	1,793
8	Spain	460	Other Africa	370	Pakistan	443	Taiwan	1,367
9	Nigeria	443	Syria	291	Turkey	359	United Kingdom	480
10	Turkey	384	Portugal	251	Brazil	268	Oman	315

Rank	Scotland and Northern Ireland n=5		South and South Eastern England n=9		South West England and The Channel Islands n=0	
1	Other Africa	11,690	Japan	9,489	n/a	n/a
2	Poland	11,324	Italy	2,546	n/a	n/a
3	Spain	7,414	China	1,974	n/a	n/a
4	Iran	6,987	Spain	1,802	n/a	n/a
5	Syria	6,415	France	1,471	n/a	n/a
6	China	4,631	Germany	1,456	n/a	n/a
7	Italy	3,599	Saudi Arabia	1,102	n/a	n/a
8	Iraq	3,500	South Korea	710	n/a	n/a
9	Other South America	3,498	Netherlands	710	n/a	n/a
10	Bulgaria	3,477	Thailand	656	n/a	n/a

Note: In order to maintain the confidentiality of individual centre data, some of the regions were merged. In the case of South West England and the Channel Islands, there were no state sector member centres in 2019.
Source: English UK, 2019; n=50 member centres

GENERAL OVERVIEW

TOP SOURCE MARKETS

Table 4: Top source countries by UK region (private sector, student weeks)

Rank	Central England and Wales n=23		Eastern England n=30		London n=86		Northern England n=42	
1	Saudi Arabia	16,677	Italy	22,510	Italy	68,363	Saudi Arabia	58,387
2	Italy	4,047	China	13,080	Brazil	34,193	Italy	28,396
3	Spain	3,257	Saudi Arabia	8,400	China	32,020	Spain	13,561
4	Japan	2,470	Spain	8,109	Japan	29,574	Kuwait	11,725
5	Kuwait	1,889	France	5,884	France	25,693	China	11,244
6	China	1,863	Turkey	5,749	Turkey	25,364	Oman	8,420
7	Qatar	1,596	Japan	5,327	South Korea	23,331	France	6,425
8	Oman	1,367	Switzerland	4,244	Russia	20,315	Switzerland	6,309
9	France	1,306	Russia	3,448	Saudi Arabia	18,016	Brazil	5,431
10	Russia	1,077	Brazil	3,305	Spain	16,668	Turkey	5,014

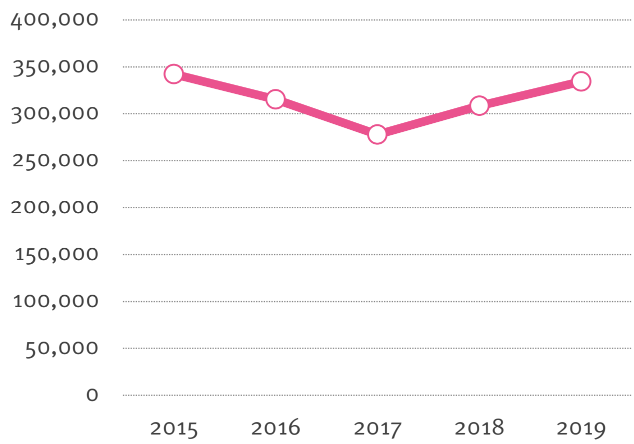
Rank	Scotland and Northern Ireland n=20		South and South Eastern England n=93		South West England and The Channel Islands n=64	
1	Italy	22,191	Italy	68,041	Italy	38,508
2	Saudi Arabia	7,951	Spain	32,454	Saudi Arabia	34,229
3	Spain	6,838	Saudi Arabia	31,927	Spain	22,522
4	France	3,203	France	25,698	Switzerland	15,187
5	China	2,293	China	24,443	France	14,766
6	Switzerland	1,998	Germany	21,508	China	13,696
7	Germany	1,939	Switzerland	21,112	Germany	13,668
8	Austria	1,829	South Korea	15,022	Russia	10,358
9	Russia	1,583	Turkey	14,367	Oman	9,354
10	Brazil	1,471	Japan	13,212	South Korea	8,190

Note: In order to maintain the confidentiality of individual centre data, some of the regions were merged.
Source: English UK, 2019; n=358 member centres

STATE SECTOR MEMBER CENTRES

MARKET OVERVIEW

Chart 5: Student weeks taught by English UK state sector members



Note: The number of member centres fluctuated over the measured period. Please see Chart 2 for more details.
Source: English UK, 2015-2019

The English UK state sector encompasses 54 language institutions, including 25 higher education and 29 further education providers.

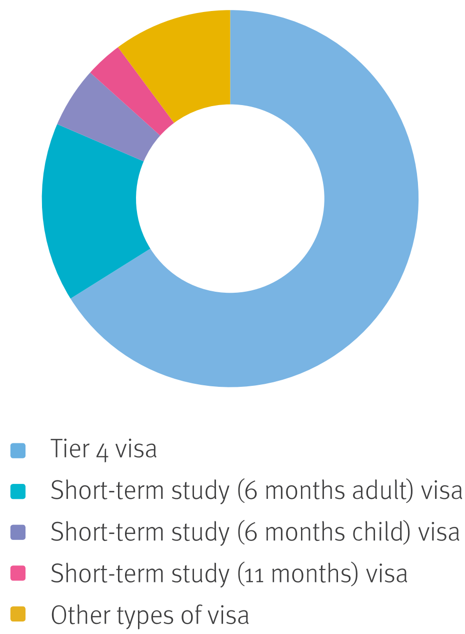
Overall, the state sector welcomed 34,066 students, which represents a decline of 2.1% over 2018. On a more positive note, student weeks grew by 8.4%, to 334,299 student weeks.

A comparison of members reporting in both 2018 and 2019 resulted in the following benchmarks.

Table 5: Like-to-like comparison of 2019 vs 2018

	Student numbers	Student weeks
2018 (n=53)	31,720	289,039
2019 (n=53)	34,066	334,299
Change (%)	+7.4%	+15.7%

Chart 6: Student numbers by visa type (state sector)



Source: English UK, 2019; n=50 member centres

State sector centres primarily hosted Tier 4 students (67%), who increased their share at the expense of students on short-term study (6-month adult) visas. In 2019, these accounted for 16% of all students.

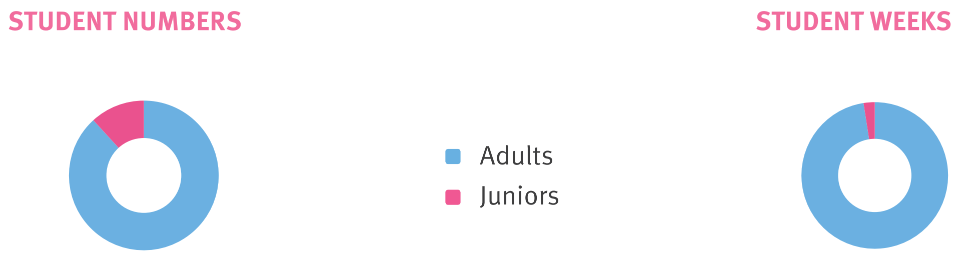
Higher education and further education institutions also recorded an increase in the proportion of students studying on other types of visa, who cumulatively represented 10% of the total.

The average number of visa denials per state sector member in 2019 dropped considerably: while in 2018 the figure stood at eight, the 2019 data point to three refusals per institution.

STATE SECTOR MEMBER CENTRES

ADULT VS JUNIOR SEGMENT

Chart 7: Share of adults and juniors out of the total number of students and student weeks in the UK (state sector)

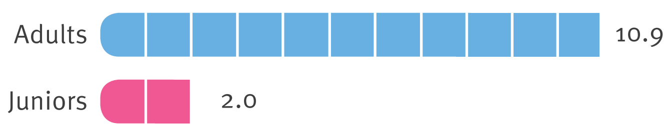


Source: English UK, 2019; n=54 state sector member centre

With a 98% share in terms of student weeks, adults remain at the heart of the UK's higher education and further education institutions. Despite their numbers being down by 1%, the number of weeks they generated grew by 9%.

In 2019, juniors decreased, both in terms of student numbers and student weeks, which slumped by 10% and 13% respectively.

Chart 8: Average length of stay (weeks, state sector)



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

Course length averaged 9.8 weeks, as compared to 8.9 in 2018, thanks to adults studying English for an average of 10.9 weeks. The vast majority of juniors opted for two-week courses.

STATE SECTOR MEMBER CENTRES

SOURCE REGIONS

Table 6: Student weeks, students and average length of stay (weeks) by source region (state sector, rank by student weeks)

Country/region	Student weeks (2018)	Student weeks (2019)	Student numbers (2018)	Student numbers (2019)	Average length of stay (2019)	Change in student weeks (%)	Change in student numbers (%)
	Overall data (n=50 centres)					Like-to-like comparison (n=45 centres)	
Asia	148,165	177,190	19,373	20,993	8.4	20.8%	16.6%
Middle East	32,967	52,112	3,690	3,151	16.5	9.3%	-6.3%
Eastern Europe	33,848	38,889	2,128	2,127	18.3	39.4%	22.1%
Western Europe	27,076	33,947	5,794	5,621	6.0	4.7%	2.4%
Africa	4,879	16,321	1,093	619	26.4	4.3%	-9.2%
LATAM	7,088	9,881	871	825	12.0	21.4%	-6.1%
North America	258	207	39	15	13.8	-17.9%	-60.5%
Australasia	24	36	2	3	12.0	50.0%	50.0%

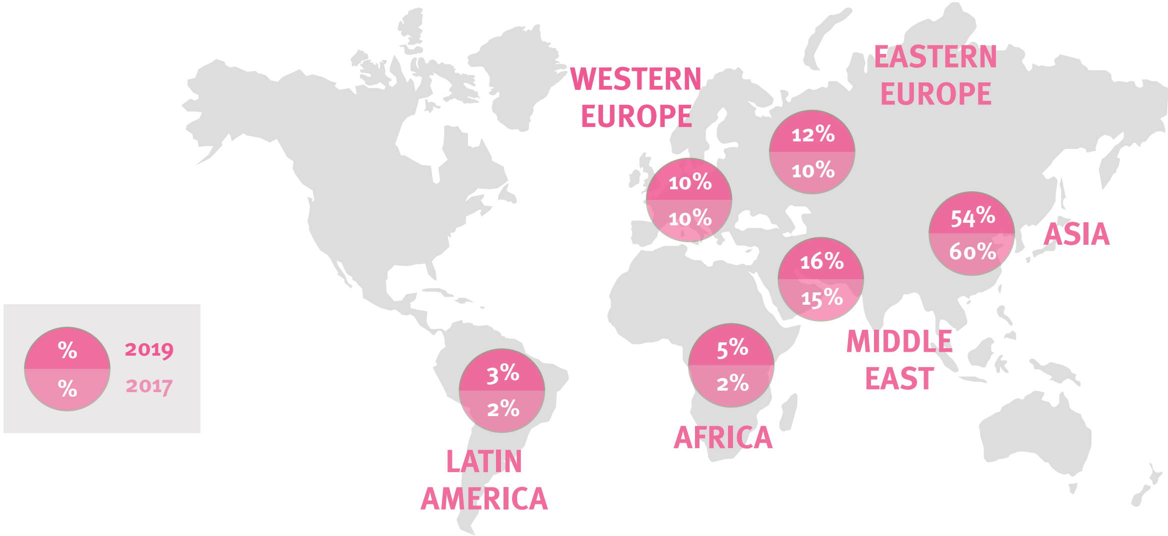
Source: English UK, 2019; n=50 state sector member centres (y-o-y changes are based on a sample of 45 providers reporting in both 2018 and 2019 to provide a like-for-like comparison).

While the sum of student numbers and weeks per region is based on the totals provided by member centres in the respective year (the sample varies), in order to provide more accurate insight into source market performance, a historical comparison based only on centres reporting in both 2018 and 2019 has been used (using unadjusted data would lead to inflating the change for some nationalities/regions).

Asia maintained its position as the leading source region for state sector English language providers. The region produced more than half (54%) of all student weeks and three times more weeks than the second most represented region, the Middle East.

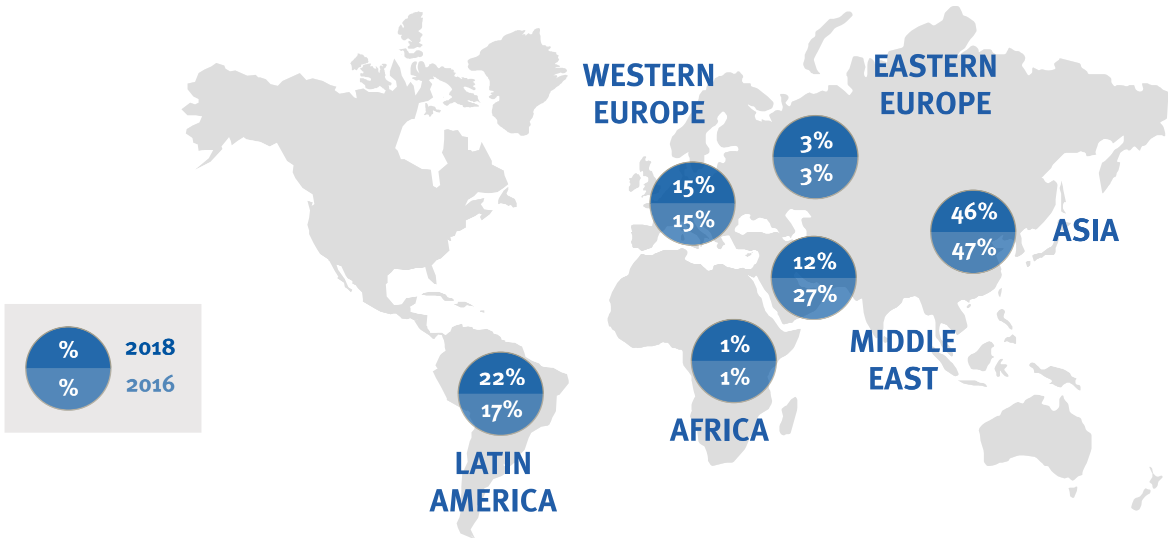
At 26.4 weeks, African students exhibited the highest average length of stay. In addition, the state sector welcomed considerably more students from Eastern Europe, though it must be noted that this was specifically thanks to an influx of Romanian students at one of the state sector centres.

Chart 9: Source region market shares (UK ELT, student weeks at state sector centres, 2017 vs 2019)



Source: English UK, 2019
Note: A comparison of 2017 and 2019 figures does not reflect fluctuation in English UK membership.

Chart 10: Source region market shares (global ELT, student weeks, 2016 vs 2018)



Source: BONARD, 2019
Note: Global data for 2019 was unavailable at the time of compilation of this report. Percentages do not add up to 100% due to rounding.

STATE SECTOR MEMBER CENTRES

SOURCE MARKETS

China represents the top source market for the state sector and, in addition, drove further growth in the sector. China's 25% y-o-y uptake resulted in a 41.2% market share.

Furthermore, Saudi Arabia outperformed Poland as the second largest producer of weeks, accounting for 5.9% of weeks in the state sector. As an indicator of healthy development, of the top ten source countries for the

Table 7: Student weeks, students and average length of stay (weeks) by source market (state sector, rank by student weeks)

Rank	Country/region	Student weeks (2018)	Student weeks (2019)	Student numbers (2018)	Student numbers (2019)	Average length of stay (2019)	Change in student weeks (%)	Change in student numbers (%)
		Overall data (n=50 centres)					Like-to-like comparison (n=45 centres)	
1	China	108,907	135,427	13,491	15,410	8.8	24.6%	21.4%
2	Saudi Arabia	17,228	19,246	1,519	1,478	13.0	11.8%	0.4%
3	Japan	17,537	18,164	2,915	2,906	6.3	15.8%	10.6%
4	Romania	4,530	15,585*	332	787	19.8	260.3%	154.1%
5	Poland	19,777	12,663	991	545	23.2	-11.3%	-22.7%
6	Other Africa	2,964	12,498*	832	446	28.0	21.8%	2.2%
7	Spain	10,481	10,949	1,513	1,076	10.2	-2.2%	-27.0%
8	Italy	6,334	7,987	2,132	2,422	3.3	18.0%	16.7%
9	Iran	1,333	7,543*	406	240	31.4	-26.8%	-26.9%
10	South Korea	7,510	7,066	1,185	1,084	6.5	2.1%	-1.4%
11	Syria	3,617	6,976	466	246	28.4	21.4%	-36.9%
12	Turkey	3,435	5,949	412	365	16.3	4.6%	-18.9%
13	France	2,362	5,199	481	478	10.9	5.3%	14.7%
14	Kuwait	3,901	4,963	354	397	12.5	10.5%	17.5%
15	Thailand	4,422	4,514	465	539	8.4	8.8%	24.3%
16	Iraq	512	3,760*	208	123	30.6	38.9%	-5.1%
17	Bulgaria	3,462	3,663	169	161	22.8	8.3%	0.6%
18	Other South America	46	3,498*	10	95	36.8	100.0%	-66.7%
19	Taiwan	2,967	3,222	422	416	7.7	13.1%	2.7%
20	United Kingdom	2,730	2,644	261	352	7.5	-24.2%	29.2%
21	Pakistan	939	2,529	146	109	23.2	26.2%	12.1%
22	Panama	2,126	2,297	165	180	12.8	8.0%	9.1%
23	Portugal	928	1,987	118	85	23.4	24.1%	-10.8%
24	Russia	1,099	1,894	253	282	6.7	-1.9%	10.7%
25	Germany	1,478	1,776	473	538	3.3	18.8%	13.8%

- **Overall data** – performance of source markets based on statistics collected from the entire sample (50);
- **Like-to-like comparison** – year-on-year benchmark based on data from centres reporting in both 2018 and 2019 (45 centres) for a more accurate assessment of source market performance trends (asterisk marks cases where a comparison based on overall data would be skewed considerably).

state sector, nine posted growth in 2019. Poland was the only market to note a decline, dropping to 5th place in terms of student weeks. Despite posting a 10.5% y-o-y increase in student weeks, Kuwait was outpaced by Other Africa. As a result, both Kuwait and Thailand were pushed out of the top 10 ranked source markets. Of the 114 markets, 63 recorded y-o-y growth, 10 remained stable and 41 declined.

Rank	Country/region	Student weeks (2018)	Student weeks (2019)	Student numbers (2018)	Student numbers (2019)	Average length of stay (2019)	Change in student weeks (%)	Change in student numbers (%)
		Overall data (n=50 centres)					Like-to-like comparison (n=45 centres)	
26	Vietnam	1,348	1,442	131	102	14.1	3.7%	-17.2%
27	Brazil	1,643	1,374	315	164	8.4	-24.2%	-47.4%
28	Other Asia / Far East	899	1,357	75	69	19.7	22.9%	7.0%
29	India	503	1,166	77	92	12.7	70.2%	63.3%
30	Latvia	899	1,119	46	48	23.3	35.3%	17.1%
31	Libya	837	1,074	88	48	22.4	-21.2%	-36.4%
32	Netherlands	557	1,036	346	413	2.5	101.0%	20.1%
33	Greece	616	992	59	55	18.0	17.6%	4.7%
34	Other Middle East	347	931	76	26	35.8	-89.8%	-93.8%
35	Nigeria	274	865	31	41	21.1	236.6%	89.5%
36	Hungary	920	795	70	51	15.6	-13.4%	-20.7%
37	Egypt	222	766	38	37	20.7	53.1%	53.3%
38	Colombia	938	743	136	87	8.5	-5.3%	-30.8%
39	Czech Republic	854	685	77	65	10.5	1.4%	-3.1%
40	Switzerland	630	681	153	117	5.8	3.2%	-22.3%
41	Lithuania	815	607	47	27	22.5	-26.1%	-35.1%
42	Hong Kong	986	586	127	46	12.7	-41.3%	-54.6%
43	Jordan	516	584	53	44	13.3	-3.7%	-21.6%
44	Oman	534	523	62	49	10.7	0.0%	-19.7%
45	Albania	224	474	35	25	19.0	-35.8%	0.0%
46	United Arab Emirates	346	467	36	30	15.6	35.0%	-16.7%
47	Chile	653	465	93	94	4.9	-18.8%	7.0%
48	Algeria	296	461	52	18	25.6	-50.8%	-64.0%
49	Ecuador	288	423	29	50	8.5	86.3%	85.2%
50	Slovakia	410	401	29	52	7.7	4.1%	100.0%

- **Overall data** – performance of source markets based on statistics collected from the entire sample (50);
- **Like-to-like comparison** – year-on-year benchmark based on data from centres reporting in both 2018 and 2019 (45 centres) for a more accurate assessment of source market performance trends.

Rank	Country/region	Student weeks (2018)	Student weeks (2019)	Student numbers (2018)	Student numbers (2019)	Average length of stay (2019)	Change in student weeks (%)	Change in student numbers (%)
		Overall data (n=50 centres)					Like-to-like comparison (n=45 centres)	
51	Cyprus	356	348	27	27	12.9	5.6%	0.0%
52	Nepal	144	342	15	21	16.3	313.2%	77.8%
53	Morocco	187	335	27	17	19.7	18.1%	-42.9%
54	Yemen	221	325	17	16	20.3	12.0%	22.2%
55	Belgium	266	319	29	23	13.9	38.7%	-8.0%
56	Angola	84	310	18	10	31.0	112.5%	50.0%
57	Indonesia	448	245	87	27	9.1	-47.0%	-69.4%
58	Venezuela	240	241	14	15	16.1	88.9%	55.6%
59	Bahrain	318	240	26	17	14.1	-26.1%	-38.5%
60	Palestine	98	231	10	16	14.4	22.4%	30.0%
61	Malaysia	185	216	17	22	9.8	-4.7%	42.9%
62	Ukraine	194	209	25	22	9.5	-8.2%	11.1%
63	Other Central America	142	207	12	11	18.8	60.4%	11.1%
64	Peru	63	206	20	63	3.3	227.0%	215.0%
65	Argentina	347	201	27	29	6.9	27.1%	86.7%
66	Uzbekistan	47	196	11	51	3.8	317.0%	363.6%
67	Qatar	348	191	22	92	2.1	-44.1%	-15.0%
68	Sweden	234	179	23	17	10.5	-32.4%	-23.8%
	USA	177	179	32	12	14.9	1.1%	-62.5%
70	Mexico	519	171	45	21	8.1	-35.7%	-43.2%
71	Lebanon	136	151	17	9	16.8	-33.0%	-25.0%
72	Azerbaijan	133	150	49	7	21.4	-59.8%	-90.2%
73	Macao	67	137	6	8	17.1	104.5%	33.3%
74	Kazakhstan	835	126	116	22	5.7	-87.4%	-75.6%
75	Moldova	96	112	4	5	22.4	5.6%	50.0%
76	Estonia	73	101	4	3	33.7	73.0%	0.0%
77	Belarus	12	92	3	3	30.7	50.0%	-66.7%
78	Cambodia	15	91	2	41	2.2	506.7%	1,950.0%
79	Austria	126	65	46	26	2.5	-48.4%	-43.5%
80	Croatia	14	59	5	4	14.8	57.1%	-40.0%
81	Ireland	4	56	1	3	18.7	1,300.0%	200.0%
82	Philippines	49	49	3	6	8.2	0.0%	100.0%

- **Overall data** – performance of source markets based on statistics collected from the entire sample (50);
- **Like-to-like comparison** – year-on-year benchmark based on data from centres reporting in both 2018 and 2019 (45 centres) for a more accurate assessment of source market performance trends.

Rank	Country/region	Student weeks (2018)	Student weeks (2019)	Student numbers (2018)	Student numbers (2019)	Average length of stay (2019)	Change in student weeks (%)	Change in student numbers (%)
		Overall data (n=50 centres)					Like-to-like comparison (n=45 centres)	
83	Singapore	24	48	2	3	16.0	100.0%	50.0%
84	Slovenia	28	42	4	18	2.3	50.0%	350.0%
85	Other Eastern Europe	36	37	3	1	37.0	n/a	n/a
86	Turkmenistan	36	34	3	3	11.3	-5.6%	0.0%
87	Israel	77	32	6	3	10.7	68.4%	0.0%
88	Georgia	92	31	10	5	6.2	-44.6%	25.0%
	Iceland	71	31	15	11	2.8	-56.3%	-26.7%
90	Mongolia	6	30	1	2	15.0	400.0%	100.0%
	Costa Rica	0	30	0	13	2.3	n/a	n/a
92	Canada	69	28	6	3	9.3	-55.6%	-40.0%
93	Australia	24	24	2	2	12.0	0.0%	0.0%
94	Bolivia	6	18	1	1	18.0	200.0%	0.0%
95	Denmark	28	15	8	1	15.0	-46.4%	-87.5%
96	Luxembourg	6	13	2	2	6.5	116.7%	0.0%
97	Tajikistan	50	12	1	1	12.0	-76.0%	0.0%
	Norway	30	12	10	1	12.0	-60.0%	-90.0%
	Tunisia	15	12	7	2	6.0	-20.0%	-71.4%
	Other Australasia	0	12	0	1	12.0	n/a	n/a
101	Kyrgyzstan	0	10	0	1	10.0	n/a	n/a
102	Other Western Europe	195	6	124	1	6.0	-96.2%	-90.9%
103	Paraguay	36	5	2	1	5.0	n/a	n/a
104	Macedonia	48	3	3	1	3.0	-87.5%	-50.0%
105	Uruguay	41	2	2	1	2.0	-60.0%	0.0%
106	Armenia	16	0	16	0	n/a	-100.0%	-100.0%
	Other North America	12	0	1	0	n/a	-100.0%	-100.0%
	Bosnia and Herzegovina	1	0	1	0	n/a	-100.0%	-100.0%
	Finland	0	0	0	0	n/a	n/a	n/a
	Liechtenstein	0	0	0	0	n/a	n/a	n/a
	Monaco	0	0	0	0	n/a	n/a	n/a
	Montenegro	0	0	0	0	n/a	n/a	n/a
	New Zealand	0	0	0	0	n/a	n/a	n/a
	Serbia	0	0	0	0	n/a	n/a	n/a

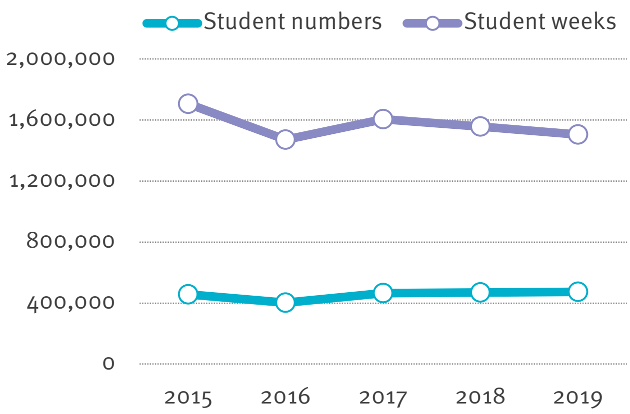
- **Overall data** – performance of source markets based on statistics collected from the entire sample (50);
- **Like-to-like comparison** – year-on-year benchmark based on data from centres reporting in both 2018 and 2019 (45 centres) for a more accurate assessment of source market performance trends.

Source: English UK, 2019

PRIVATE SECTOR MEMBER CENTRES

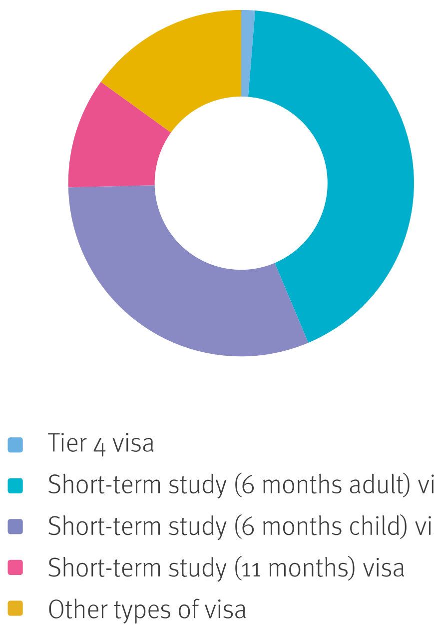
MARKET OVERVIEW

Chart 11: Student numbers and student weeks taught by English UK private sector members



Note: The number of member centres fluctuated over the measured period. Please see Chart 2 for more details.
Source: English UK, 2015-2019

Chart 12: Student numbers by visa type (private sector)



Source: English UK, 2019; n=358

In 2019, 359 private centres enrolled a total of 474,548 students. Despite the fact that there were 4,475 more students than in 2018, the overall number of weeks followed a downward trend, dropping from 1,558,448 to 1,505,356 between 2018 and 2019.

That said, development in the sector was not uniform: 44% of centres delivered more student weeks than in 2018, whilst the rest saw a decrease. Importantly, chain schools, which represent approximately 35% of the private sector membership, accounted for 54% of the drop.

Meanwhile, an average of 1,024 junior learners were hosted per centre, an increase of 9% over 2018. The average adult student population showed a 3% decrease, declining from 768 learners per centre to 743.

A comparison of members reporting in both 2018 and 2019 revealed the following student week benchmark:

Table 8: Like-to-like comparison of 2019 vs 2018

	Student numbers	Student weeks
2018 (n=345)	463,314	1,532,987
2019 (n=345)	466,662	1,487,933
Change (%)	+0.7%	-2.9%

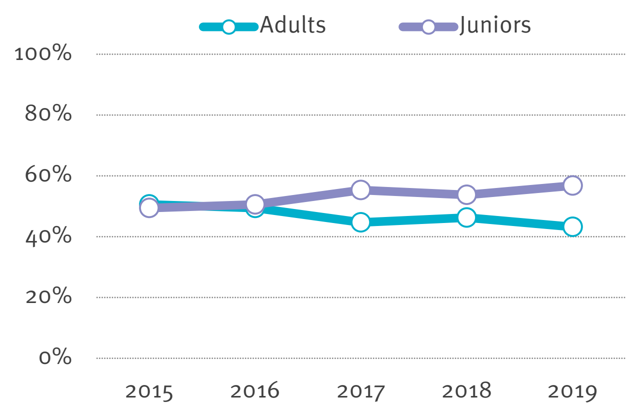
With regards to granted visa statistics, 42% of students were registered under a short-term study (6-month adult) visa, whereas 31% of students were short-term study (6-month child) visa-holders. Other types of visa covered 15% of learners. The short-term study (11-month) visa category represented 10% of the market.

The average number of visa denials per centre stood at 11 in 2019 compared with 8 in 2018.

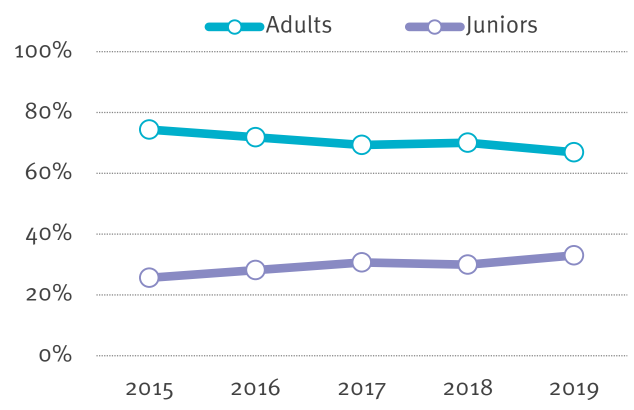
ADULT VS JUNIOR SEGMENT

Chart 13: Share of adults and juniors out of the total number of students and student weeks in the UK (private sector)

STUDENT NUMBERS



STUDENT WEEKS

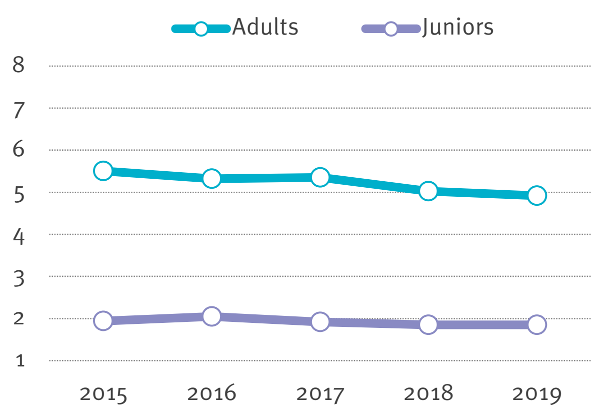


Note: The number of member centres fluctuated over the measured period. Please see Chart 2 for more details.
Source: English UK, 2015-2019

Although fewer English UK members enrolled juniors (263, down from 269 in 2018), they cumulatively taught more minors. The UK proved to be an attractive study destination choice, as the under-18 segment posted a 6.6% y-o-y growth and increased to a new record of 269,425 students in 2019.

Consequently, juniors comprised 57% of all English language learners within the English UK private sector membership. The private sector welcomed 205,123 adult students, representing 6% fewer than in 2018. More importantly, the overall number of weeks spent by adults dipped by 8%.

Chart 14: Average length of stay (weeks, private sector)



Source: English UK, 2015-2019

Students' choice of programmes with a shorter study duration continues to pose a significant challenge to the UK ELT industry.

Following a noteworthy drop in the average length of stay between 2017 and 2018, it remained relatively stable in 2019, at 4.9 weeks for adults and 1.8 weeks for juniors.

PRIVATE SECTOR MEMBER CENTRES

SOURCE REGIONS

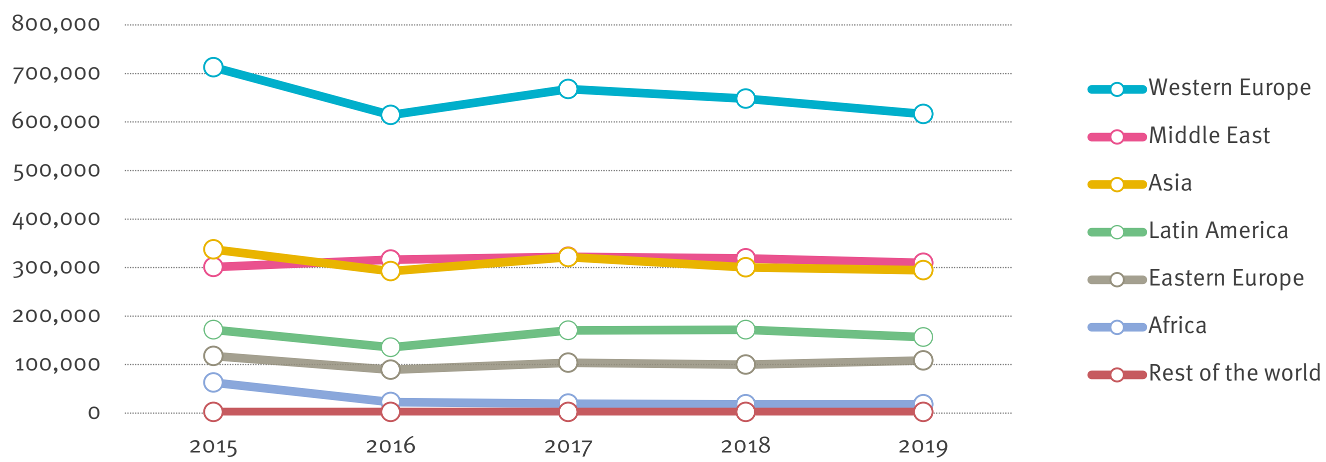
Table 9: Student weeks, students and average length of stay (weeks) by source region (private sector, rank by student weeks)

Country/region	Student weeks (2018)	Student weeks (2019)	Student numbers (2018)	Student numbers (2019)	Average length of stay (2019)	Change in student weeks (%)	Change in student numbers (%)
	Overall data (n=358 centres)					Like-to-like comparison (n=344 centres)	
Western Europe	647,865	616,387	281,217	285,082	2.2	-4.6%	0.9%
Middle East	319,052	309,941	43,618	39,140	7.9	-1.8%	-9.6%
Asia	300,349	294,156	67,694	70,915	4.1	-1.5%	5.4%
Latin America	171,717	156,545	34,057	30,610	5.1	-8.0%	-9.9%
Eastern Europe	99,762	108,352	39,583	44,313	2.4	8.4%	11.1%
Africa	17,766	17,729	3,400	3,634	4.9	-1.4%	6.0%
North America	1,747	1,906	455	657	2.9	5.2%	36.0%
Australasia	190	197	49	51	3.9	3.7%	4.1%

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)

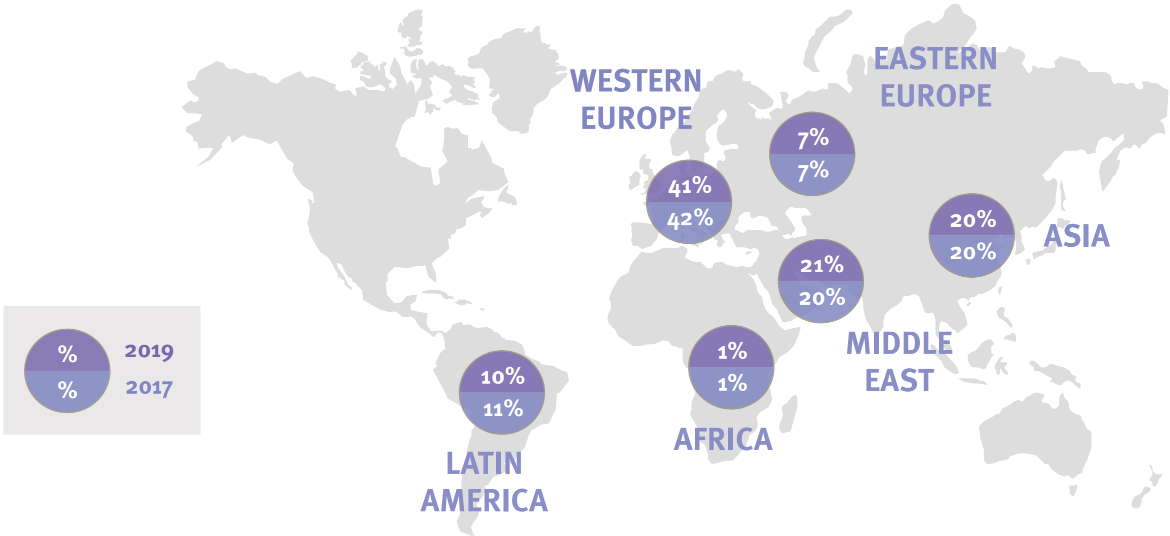
The four largest source regions for UK ELT exhibited a decline in terms of student weeks. The largest drops were recorded in Latin America, where a 8% fall in student weeks was accompanied by a 10% slump in student numbers. Western European countries sent 1% more students, though student weeks dipped by 5%. Similarly, the sector welcomed more Asian students (5%), though they cumulatively spent 2% fewer weeks. The Middle East saw 10% fewer students but, thanks to a longer average study duration, weeks only dropped by 2%. Eastern Europe was the only region that provided growth in terms of both student numbers and weeks (11% and 8% respectively).

Chart 15: Student weeks by source region (2015-2019, private sector)



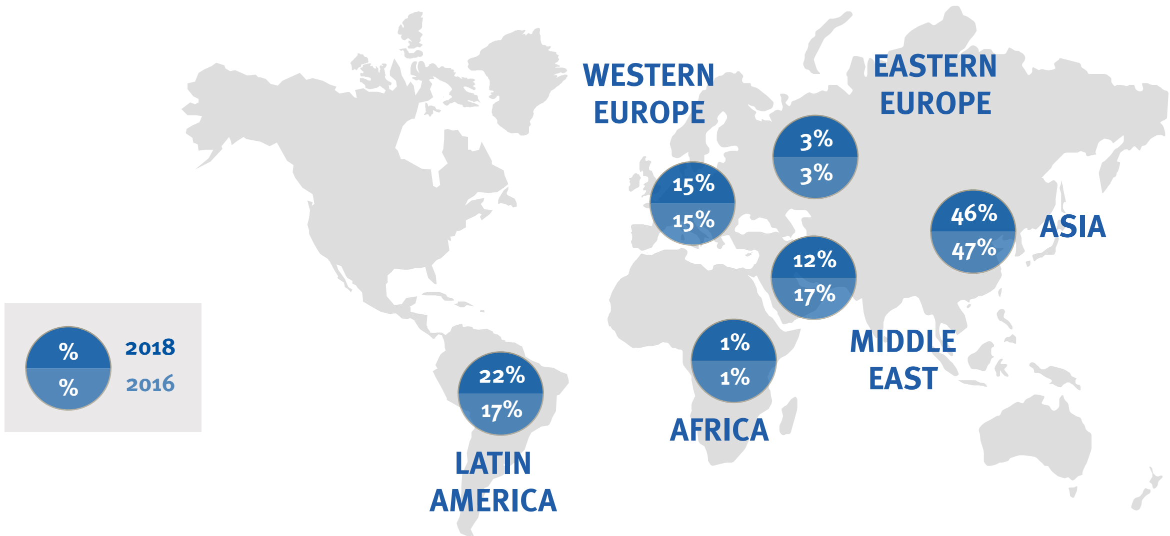
Note: The number of member centres fluctuated over the measured period. Please see Chart 2 for more details.
Source: English UK, 2015-2019

Chart 16: Source region market shares (UK ELT, student weeks at private sector centres, 2017 vs 2019)



Source: English UK, 2019
Note: A comparison of 2017 and 2019 figures does not reflect fluctuation in English UK membership.

Chart 17: Source region market shares (global ELT, student weeks, 2016 vs 2018)



Source: BONARD, 2019
Note: Global data for 2019 was unavailable at the time of compilation of this report. Percentages do not add up to 100% due to rounding.

PRIVATE SECTOR MEMBER CENTRES

SOURCE MARKETS

With a total of 252,056 weeks, Italy remained the leading source market for private sector members, increasing by 1%. Overall, the country accounted for 17% of all student weeks spent in the private sector. Saudi Arabia followed, manifesting an extraordinary growth of 21% to represent 175,587 weeks and a 12% share. Although remaining the 3rd most important source market, Spain continued to decline, experiencing an 8% decrease. Among other newsworthy developments, China expanded by 4% in student weeks, while Turkey shrank by 29%, a result tied to a bump in the

Table 10: Student weeks, students and average length of stay (weeks) by source market (private sector, rank by student weeks)

Rank	Country/region	Student weeks (2018)	Student weeks (2019)	Student numbers (2018)	Student numbers (2019)	Average length of stay (2019)	Change in student weeks (%)	Change in student numbers (%)
		Overall data (n=358 centres)					Like-to-like comparison (n=344 centres)	
1	Italy	251,730	252,056	125,840	132,667	1.9	1.0%	6.1%
2	Saudi Arabia	147,664	175,587	17,455	18,087	9.7	20.7%	5.4%
3	Spain	112,369	103,409	45,237	47,385	2.2	-8.2%	3.7%
4	China	95,318	98,639	33,881	36,050	2.7	3.9%	6.9%
5	France	87,163	82,975	35,331	33,152	2.5	-5.0%	-7.3%
6	Japan	61,031	62,320	11,481	12,537	5.0	3.6%	10.7%
7	Switzerland	69,871	62,040	16,853	15,762	3.9	-8.8%	-5.2%
8	Brazil	62,194	58,703	13,640	13,174	4.5	-4.5%	-2.8%
9	Turkey	83,637	58,394	14,106	9,691	6.0	-29.3%	-31.0%
10	South Korea	63,388	55,218	6,515	6,099	9.1	-12.0%	-5.3%
11	Germany	58,823	53,931	30,901	29,941	1.8	-11.6%	-7.6%
12	Russia	45,258	51,930	17,555	21,048	2.5	14.1%	18.8%
13	Thailand	26,346	27,760	4,510	4,593	6.0	5.9%	2.3%
14	Colombia	30,472	26,620	3,009	2,457	10.8	-10.9%	-16.8%
15	Oman	25,346	26,338	3,304	3,245	8.1	5.5%	-1.3%
16	Kuwait	29,333	24,187	2,997	2,879	8.4	-18.0%	-4.3%
17	Taiwan	24,289	22,232	4,091	4,409	5.0	-8.3%	7.7%
18	Argentina	24,229	18,417	7,856	5,895	3.1	-23.4%	-24.8%
19	Chile	18,500	17,692	2,847	2,631	6.7	-4.0%	-7.3%
20	Mexico	15,115	14,696	3,447	3,044	4.8	-2.9%	-13.6%
21	Poland	12,712	13,358	5,644	6,101	2.2	8.3%	10.0%
22	Austria	11,484	11,987	8,130	8,901	1.3	4.6%	10.0%
23	United Kingdom	12,505	10,160	2,496	2,344	4.3	-21.3%	-13.4%
24	Ukraine	8,628	9,852	3,250	3,964	2.5	11.8%	19.3%
25	Belgium	10,050	9,622	3,757	3,559	2.7	-1.9%	-3.1%

- **Overall data** – performance of source markets based on statistics collected from the entire sample (358);
- **Like-to-like comparison** – year-on-year benchmark based on data from centres reporting in both 2018 and 2019 (344 centres) for a more accurate assessment of source market performance trends.

visa refusal rate throughout 2019. Brazil replaced South Korea as the 8th strongest market, yet this was only the result of a less steep pace of decline. Conversely, thanks to increasing by 2,168 weeks, Japan managed to jump from the 10th to the 6th position. Of the 114 markets measured, 45 countries recorded a y-o-y growth, while 69 declined. Based on a like-to-like comparison (centres reporting in both 2018 and 2019), the largest y-o-y drop among the top 20 source markets, apart from Turkey, was exhibited by Argentina (23%).

Rank	Country/region	Student weeks (2018)	Student weeks (2019)	Student numbers (2018)	Student numbers (2019)	Average length of stay (2019)	Change in student weeks (%)	Change in student numbers (%)
		Overall data (n=358 centres)					Like-to-like comparison (n=344 centres)	
26	Czech Republic	9,874	9,411	4,800	4,510	2.1	-6.7%	-10.6%
27	Portugal	8,517	8,086	2,885	2,719	3.0	-4.7%	-5.2%
28	Kazakhstan	8,608	7,198	2,105	1,890	3.8	-16.4%	-10.9%
29	Netherlands	7,773	6,894	3,231	3,080	2.2	-11.3%	-4.8%
30	Hong Kong	6,799	6,497	1,515	1,741	3.7	-3.6%	16.1%
31	Qatar	11,207	6,480	975	798	8.1	-42.6%	-18.1%
32	Sweden	6,146	6,261	1,545	1,471	4.3	2.0%	-4.7%
33	Israel	5,498	5,340	2,302	2,207	2.4	-2.4%	-4.1%
34	Ecuador	4,177	4,703	630	665	7.1	10.4%	4.0%
35	Other Africa	4,106	4,634	620	783	5.9	9.5%	23.2%
36	Morocco	3,583	3,927	823	1,089	3.6	6.5%	31.0%
37	Peru	4,317	3,862	741	637	6.1	-10.2%	-13.7%
38	Hungary	3,714	3,380	1,333	1,250	2.7	-5.9%	-1.7%
39	Romania	3,146	3,284	1,296	1,388	2.4	5.3%	7.5%
40	Uruguay	1,747	3,243	474	933	3.5	86.6%	97.3%
41	United Arab Emirates	4,738	3,234	829	664	4.9	-30.5%	-19.8%
42	Venezuela	4,903	3,191	533	310	10.3	-34.4%	-41.9%
43	Bulgaria	3,263	3,147	918	857	3.7	-4.4%	-7.4%
44	Algeria	3,961	3,109	719	562	5.5	-19.9%	-21.5%
45	Greece	2,719	2,814	1,170	1,434	2.0	6.1%	24.9%
46	Iran	2,947	2,361	397	370	6.4	-20.7%	-7.1%
47	Vietnam	1,845	2,358	519	693	3.4	28.2%	31.7%
48	Slovakia	2,283	2,299	865	848	2.7	0.4%	-2.2%
49	Panama	2,475	2,179	212	189	11.5	-11.5%	-10.4%
50	Libya	1,660	2,058	206	196	10.5	24.8%	-3.9%

- **Overall data** – performance of source markets based on statistics collected from the entire sample (358);
- **Like-to-like comparison** – year-on-year benchmark based on data from centres reporting in both 2018 and 2019 (344 centres) for a more accurate assessment of source market performance trends.

PRIVATE SECTOR MEMBER CENTRES

SOURCE MARKETS

Rank	Country/region	Student weeks (2018)	Student weeks (2019)	Student numbers (2018)	Student numbers (2019)	Average length of stay (2019)	Change in student weeks (%)	Change in student numbers (%)
		Overall data (n=358 centres)					Like-to-like comparison (n=344 centres)	
51	Jordan	2,288	1,949	327	277	7.0	-14.8%	-15.3%
52	Denmark	2,879	1,916	1,291	846	2.3	-33.7%	-34.8%
53	Belarus	1,489	1,733	543	575	3.0	12.3%	-0.6%
54	Angola	1,756	1,710	234	170	10.1	-0.1%	-27.0%
55	Uzbekistan	1,389	1,670	458	464	3.6	7.3%	5.0%
56	Cyprus	1,317	1,608	255	256	6.3	22.6%	0.8%
57	Other Central America	1,247	1,432	281	293	4.9	15.9%	4.6%
58	Other Asia / Far East	1,396	1,388	229	275	5.0	-0.9%	21.0%
59	Bahrain	1,488	1,369	191	195	7.0	-8.3%	1.1%
60	Indonesia	1,613	1,349	283	300	4.5	-18.4%	3.5%
61	Norway	1,639	1,310	706	551	2.4	-20.5%	-21.5%
62	Tunisia	1,632	1,301	483	592	2.2	-20.4%	22.4%
63	Syria	1,571	1,292	178	159	8.1	-22.0%	-13.2%
64	Croatia	1,316	1,274	588	604	2.1	-2.1%	3.6%
65	Serbia	1,373	1,269	581	571	2.2	-7.0%	-1.2%
66	Yemen	1,093	1,265	130	106	11.9	15.4%	-19.2%
67	Other Western Europe	1,071	1,138	648	532	2.1	-5.2%	-26.6%
68	Albania	974	1,130	130	171	6.6	14.4%	34.1%
69	Latvia	1,034	993	365	420	2.4	-2.9%	15.2%
70	Georgia	934	973	333	332	2.9	9.7%	3.1%
71	Iraq	1,044	955	175	169	5.7	-14.7%	-20.7%
72	Slovenia	779	929	422	460	2.0	17.4%	7.6%
73	India	969	920	289	226	4.1	-23.9%	-29.6%
74	Lithuania	716	885	276	342	2.6	22.7%	25.5%
75	Azerbaijan	1,073	879	388	321	2.7	-20.4%	-17.9%
76	Mongolia	890	876	58	60	14.6	3.5%	5.3%
77	USA	619	823	169	314	2.6	31.7%	84.6%
78	Finland	1,248	814	538	353	2.3	-33.7%	-32.2%
79	Canada	841	784	241	295	2.7	-14.0%	7.1%
80	Estonia	498	698	338	480	1.5	42.2%	44.1%
81	Egypt	755	644	220	162	4.0	-14.6%	-26.4%
82	Paraguay	484	600	74	117	5.1	24.0%	58.1%

- **Overall data** – performance of source markets based on statistics collected from the entire sample (358);
- **Like-to-like comparison** – year-on-year benchmark based on data from centres reporting in both 2018 and 2019 (344 centres) for a more accurate assessment of source market performance trends.

Rank	Country/region	Student weeks (2018)	Student weeks (2019)	Student numbers (2018)	Student numbers (2019)	Average length of stay (2019)	Change in student weeks (%)	Change in student numbers (%)
		Overall data (n=358 centres)					Like-to-like comparison (n=344 centres)	
83	Other Middle East	552	540	73	128	4.2	-2.2%	75.3%
84	Pakistan	611	521	224	161	3.2	-18.8%	-30.0%
85	Philippines	245	486	61	115	4.2	92.2%	85.2%
86	Other Eastern Europe	765	473	214	198	2.4	-37.0%	-5.7%
87	Macao	874	466	152	105	4.4	-47.0%	-32.2%
88	Palestine	406	453	87	102	4.4	12.1%	18.6%
89	Costa Rica	651	444	126	151	2.9	-31.4%	21.8%
90	Bolivia	635	432	88	62	7.0	-31.3%	-26.2%
91	Tajikistan	391	414	57	42	9.9	5.9%	-26.3%
92	Kyrgyzstan	631	413	92	75	5.5	-33.7%	-19.8%
93	Cambodia	161	405	64	117	3.5	141.6%	79.7%
94	Armenia	404	402	160	145	2.8	0.2%	-7.1%
95	Malaysia	443	398	100	76	5.2	-10.2%	-24.0%
96	Luxembourg	379	353	181	151	2.3	-9.5%	-18.8%
97	Nigeria	313	346	95	80	4.3	-15.9%	-21.3%
98	Other South America	571	331	99	52	6.4	-41.2%	-46.9%
99	Other North America	287	299	45	48	6.2	4.2%	6.7%
100	Turkmenistan	562	258	84	47	5.5	-54.1%	-44.0%
101	Montenegro	172	241	58	93	2.6	39.0%	56.9%
102	Moldova	211	238	69	86	2.8	15.0%	26.5%
103	Iceland	296	230	126	109	2.1	-22.3%	-13.5%
104	Lebanon	240	197	92	63	3.1	-12.1%	-25.0%
105	Liechtenstein	269	195	110	73	2.7	-35.0%	-41.7%
106	Bosnia and Herzegovina	89	140	40	57	2.5	57.3%	42.5%
107	Australia	99	124	31	40	3.1	25.3%	29.0%
108	Monaco	89	108	38	35	3.1	21.3%	-7.9%
109	Ireland	845	88	203	17	5.2	-89.6%	-91.6%
110	Macedonia	151	80	43	34	2.4	-44.1%	-15.0%
111	Nepal	113	77	31	25	3.1	-31.9%	-19.4%
112	Other Australasia	61	55	8	6	9.2	-9.8%	-25.0%
113	Singapore	26	39	14	17	2.3	50.0%	21.4%
114	New Zealand	30	18	10	5	3.6	-40.0%	-50.0%

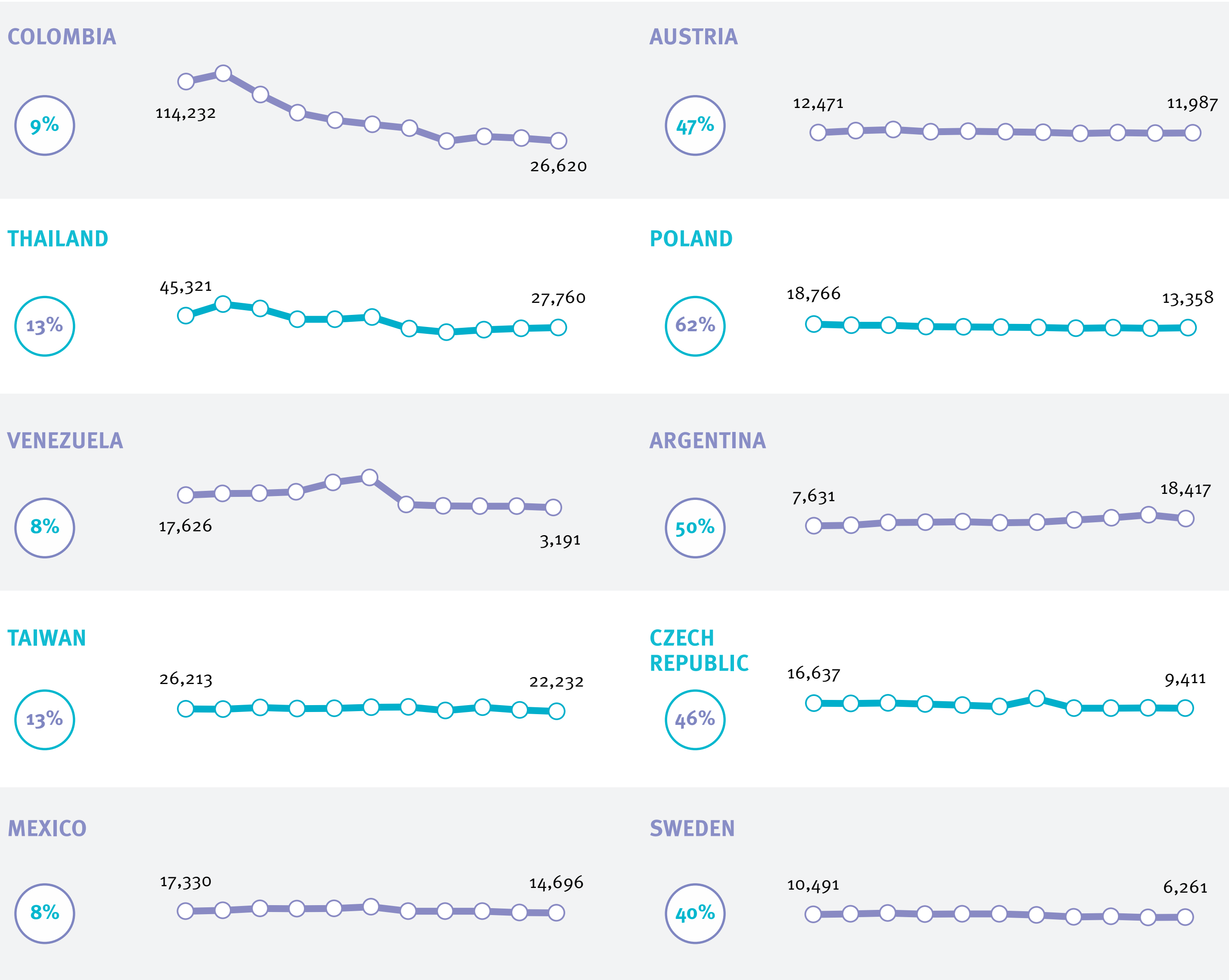
- **Overall data** – performance of source markets based on statistics collected from the entire sample (358);
- **Like-to-like comparison** – year-on-year benchmark based on data from centres reporting in both 2018 and 2019 (344 centres) for a more accurate assessment of source market performance trends.

Source: English UK, 2019

PRIVATE SECTOR MEMBER CENTRES

SOURCE MARKETS

Chart 18: Performance of selected source markets (student weeks, private sector, 2009-2019) and the UK's estimated market share (2018)



Note: Figures do not reflect the fluctuation in the English UK membership over the measured period.
Source: English UK, 2009-2019, BONARD, 2019

PART-TIME STUDENTS AT ENGLISH UK MEMBER CENTRES

MARKET OVERVIEW

This year, the annual research was expanded to cover the part-time student population at English UK member centres. This new initiative enables us to gain a better understanding of, and benefit from a deeper insight into, the part-time student segment. 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.

Chart 19: Part-time student numbers and part-time student weeks taught by English UK members

PART-TIME STUDENT NUMBERS

6,689
STATE SECTOR

17,727
PRIVATE SECTOR

PART-TIME STUDENT WEEKS

91,114
STATE SECTOR

74,360
PRIVATE SECTOR

The 413 member centres reporting this year enrolled 24,416 part-time students. Breaking down this figure, approximately 17,727 part-time English language students spent a total of 74,360 student weeks at English UK's private sector member centres in 2019, while state sector providers accounted for 6,689 students and 91,114 student weeks. Seventy-one per cent of all part-time students were adults, cumulatively representing 96% of all student weeks. In the state sector, 23 of 54 centres hosted part-time students, whereas 84 of 359 private sector centres reported doing so.

Chart 20: Share of adults and juniors within the total number of part-time students and student weeks in the UK

PART-TIME STUDENT NUMBERS

PART-TIME STUDENT WEEKS

Source: English UK, 2019; n=107

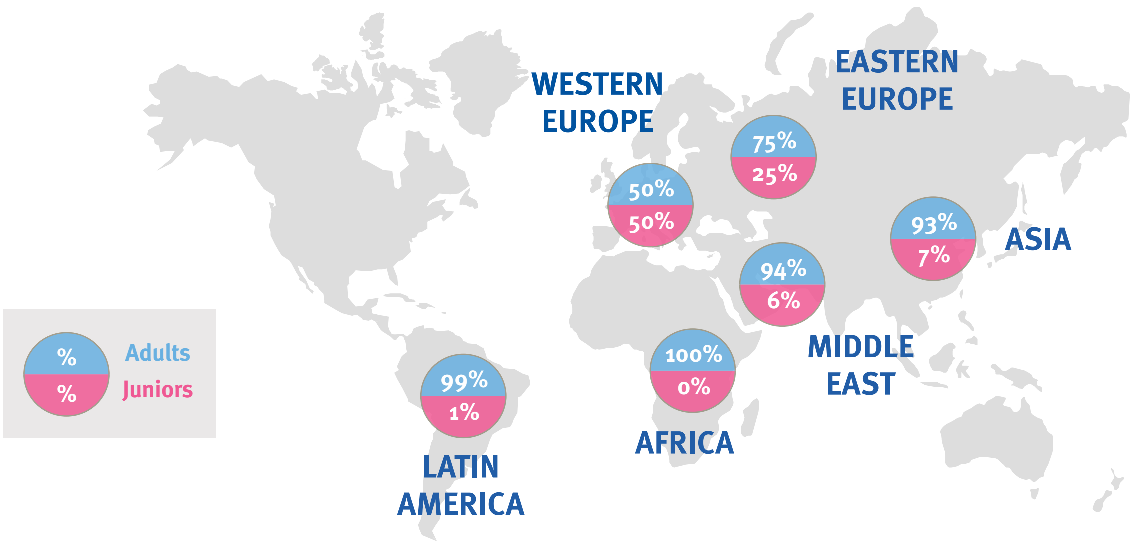
BONARD ENGLISH UK

PART-TIME STUDENTS AT ENGLISH UK MEMBER CENTRES

SOURCE REGIONS

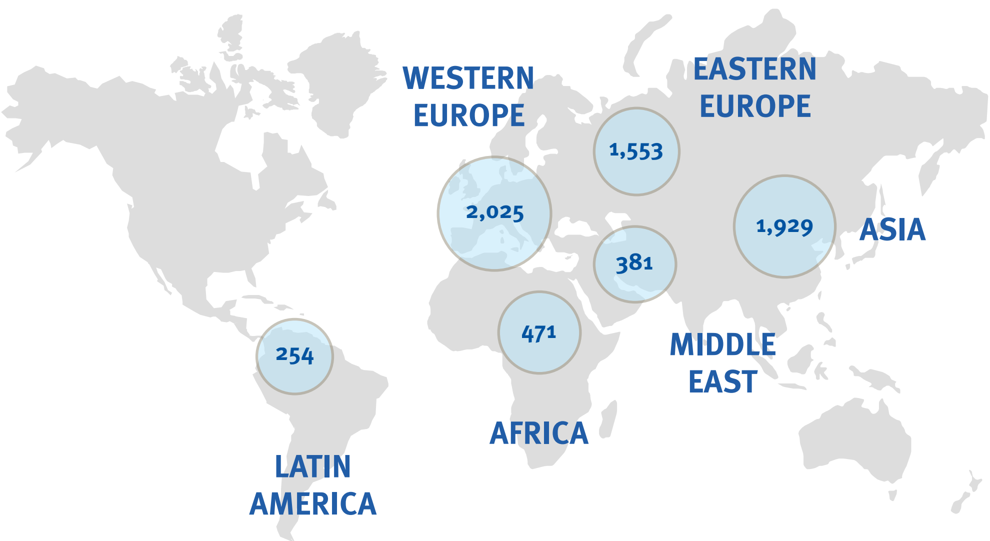
Western Europe constituted the most important source region for part-time language students for both sectors, contributing 42,737 and 31,658 weeks to the private and state sector, respectively. For state institutions, the largest producers of part-time weeks were Western Europe (31,618 weeks), followed by Asia (25,299 weeks). At the same time, part-time students from Asia delivered 1,929 weeks for the private sector, making it the second largest source region.

Chart 21: Adult to junior ratio (part-time student numbers, private sector centres)



Source: English UK, 2019; n=81

Chart 22: Number of part-time adult students by source region (state sector centres)



Source: English UK, 2019; n=22
Note: As there is only a minimal number of part-time junior students in the state sector, this only refers to adult students.

NOTES

ENGLISH UK

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