Student Statistics Report 2020

ENGLISH LANGUAGE STUDENTS IN THE UK IN 2019

Executive Summary
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

For other stakeholders, media and interested parties, please contact Jodie Gray, Interim Chief Executive, at 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

**REPORTING CENTRES**

- **413**

**STUDENTS**

- **508,614**

**STUDENT WEEKS**

- **1,839,655**

- **-6** VS 2018

+ **1.2%** VS 2018

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

**OF ALL STUDENTS WERE JUNIORS**

- **54%**

**PROPORTION OF STUDENTS WEEKS SPENT BY JUNIORS**

- **27%**

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

STUDENT ORIGIN

**EU**

**NON-EU**

**STUDENT NUMBERS**

**EU**

**NON-EU**

**STUDENT WEEKS**

**EU**

**NON-EU**

**Source:** English UK, 2019; n=408 member centres
### REGIONAL OVERVIEW

Regional market share

### 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

- **ITALY**
- **CHINA**
- **SAUDI ARABIA**
- **SPAIN**
- **FRANCE**
- **JAPAN**
- **TURKEY**
- **SWITZERLAND**
- **SOUTH KOREA**
- **BRAZIL**
STATE SECTOR OVERVIEW

**REPORTING CENTRES**
- 54

**MARKET SIZE**
- 34,066 STUDENTS
- 334,299 STUDENT WEEKS

**AGE SEGMENTS**
- 12% OF ALL STUDENTS WERE JUNIORS
- 2% PROPORTION OF STUDENTS WEEKS SPENT BY JUNIORS

**AVERAGE LENGTH OF STAY**
- 10.9 WEEKS (ADULTS)
- 2.0 WEEKS (JUNIORS)

**Source:** English UK, 2019; n=54 state sector member centres
Source: English UK, 2019; a comparison of 2017 and 2019 figures does not reflect fluctuation in English UK membership

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
- **474,548** students
- **1,505,356** student weeks

-1% VS 2018
+0.7% VS 2018
-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

- **57%** of all students were juniors
- **33%** 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**
  - 2018: 5.0 weeks
  - 2019: 4.9 weeks
- **JUNIORS**
  - 2018: 1.8 weeks
  - 2019: 1.8 weeks

*Source: English UK, 2019; 2019 n=359 and 2018 n=360 private sector member centres*
### TOP SOURCE MARKETS

<table>
<thead>
<tr>
<th>Country</th>
<th>Student Weeks</th>
<th>Year-on-Year Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy</td>
<td></td>
<td>+1%</td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td></td>
<td>+21%</td>
</tr>
<tr>
<td>Spain</td>
<td></td>
<td>-8%</td>
</tr>
<tr>
<td>China</td>
<td></td>
<td>+4%</td>
</tr>
<tr>
<td>France</td>
<td></td>
<td>-5%</td>
</tr>
<tr>
<td>Japan</td>
<td></td>
<td>+4%</td>
</tr>
<tr>
<td>Switzerland</td>
<td></td>
<td>-9%</td>
</tr>
<tr>
<td>Brazil</td>
<td></td>
<td>-5%</td>
</tr>
<tr>
<td>Turkey</td>
<td></td>
<td>-29%</td>
</tr>
<tr>
<td>South Korea</td>
<td></td>
<td>-12%</td>
</tr>
</tbody>
</table>

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)

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**SOURCE REGIONS**

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage of Total Student Weeks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Western Europe</td>
<td>41%</td>
</tr>
<tr>
<td>Eastern Europe</td>
<td>7%</td>
</tr>
<tr>
<td>Asia</td>
<td>20%</td>
</tr>
<tr>
<td>Middle East</td>
<td>21%</td>
</tr>
<tr>
<td>Latin America</td>
<td>10%</td>
</tr>
<tr>
<td>Africa</td>
<td>10%</td>
</tr>
</tbody>
</table>

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

- **29%** of all part-time students were juniors
- **4%** of part-time students weeks spent by juniors

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