Student Statistics Report 2022

ENGLISH LANGUAGE STUDENTS IN THE UK IN 2021

05/2022

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STUDENT STATISTICS REPORT 2022

Prepared on behalf of:

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FOREWORD

When we shared the student statistics report last May, it was with a cautious sense of optimism that things were beginning to improve and we were on the cusp of a strong recovery.

We reckoned without Covid's ability to reinvent itself. The year began with a strict lockdown and - although QUIC data shows student numbers improving through 2021 - continuing restrictions prevented last summer's hoped-for bounce back.

So it will be no great surprise that this year's figures are not particularly uplifting. In 2021, the UK welcomed about a tenth of the English language students we had pre-Covid, with a 35.7% drop in numbers from 2020 and a 12.9% drop in student weeks. That was on top of the previous year's unprecedented drop of 71.1% in student weeks and 83.6% in student numbers.

Providing this data is never members' favourite task, but we ask for good reason. Robust statistics and analysis give us ammunition for lobbying, and they show us all where to find the glimmers of light in the current gloom.

Fascinating developments demonstrate our resilience and adaptability. Wales and Central England lost just one per cent of student weeks, compared with double-digit drops for every other region. Northern England recorded the highest number of student weeks, outperforming London. Almost a third of students used blended learning, with a significant year-on-year increase in numbers studying online as an alternative to face-to face courses.

This new market information and lobbying ammunition is invaluable as we – with few reserves - battle residual Covid issues, capacity challenges and EU junior groups preferring to travel on ID cards. Together, we continue our fightback - with new weapons in our armoury.

Jodie Gray
Chief Executive
English UK

In 2021, we witnessed a switch from pandemic impact management to proactive business development, which paved the way for initiatives aimed at rebuilding student pipelines and capacity. UK ELT has already seen a positive effect on bookings, as student numbers rose incrementally throughout 2021. There is cautious optimism in the industry, translated into language schools accelerating their staff rehiring processes.

Thanks to border opening and gradual easing of restrictions, 41% of English language students at English UK member centres enjoyed face-to-face tuition. At the same time, hybrid and purely online classes continued to be important course delivery methods and accounted for 31% and 28% of students, respectively.

Going forward, diversity in course offering and delivery modes, as well as value proposition related to meeting students' academic and employment needs, will further strengthen the competitiveness of the UK as an English language study destination. Among the trends we expect to see are: continued flexibility in course delivery (e.g., start dates), joint marketing activities, advanced information provision on emerging trends and, last but not least, consolidation.

To secure its further development, the sector also deserves the support of government departments. The English language sector often provides the first point of contact with a destination for young travellers and this makes a lasting impact, contributing to a stream of returning travellers and serving as a gateway to other international education sectors. In the short-term, its recruitment capacity and experience has the potential to help fast-track the reconstruction of the broader international education industry.

Patrik Pavlacic
Head of Research
BONARD

METHODOLOGY

The core data in this report was collated from English UK annual student data submissions returned between 2010 and 2021.

A descriptive note beneath each chart states the origin and provenance 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 (y-o-y). Where appropriate, we have therefore introduced historical comparisons based on the same research sample (only centres reporting in both 2020 and 2021);
- Of the overall English UK membership of 341, two centres were not in a position to supply their annual data and were therefore excluded from the 2021 reporting;
- Not all English UK private and 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 reporting providers is always noted below the respective chart or table;
- Traditionally centres have been asked to report only on courses that take place face-to-face. To understand the impact of the pandemic, exceptionally for 2021, centres were also asked to report on 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 teaching 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. Information on part-time students can be found on pages 32 and 33.

EXECUTIVE SUMMARY

General Overview

- Overall, English UK member centres taught 53,616 full-time English language students, for a combined total of 462,046 student weeks.
- Following an 83.6% decline in the number of full-time English language students during 2020, the English UK members experienced a further 35.7% decrease in 2021. This figure does not reflect fluctuation in English UK membership.
- Likewise, following the 71.1% decrease seen in 2020, there was a further 12.9% y-o-y drop in student weeks delivered between 2020 and 2021. This figure does not reflect fluctuation in English UK membership.
- According to 325 centres reporting in both 2019 and 2021, the sector experienced an 88% drop in student numbers and a 71% decrease in student weeks between 2019 and 2021. The first three months of 2020 were largely unaffected by Covid lockdowns and travel bans. This contrasts with early 2021, when the Delta variant prompted very strict measures.
- Whilst 41% of students studied face-to-face in 2021, almost one in three saw tuition delivery changed to a blended model.
- Traditionally, juniors outnumbered adult students. However in a continued reversal of this pre-pandemic trend, under-18s represented only 9% of the student population. In 2020, it was 23%.
- In 2021, Northern England recorded the highest number of student weeks, accounting for 26% of all student weeks spent in the UK, followed by London, where one in every four weeks was spent.
- In addition, 11,206 part-time students enrolled at English UK member centres.

State Sector Member Centres

- The 41 state sector member centres taught 13,011 full-time ELT students (a decline of 5.7% over 2020) and registered a total of 141,085 student weeks (9.2% fewer than in 2020). These figures do not reflect fluctuation in English UK membership.
- Only 1% of students attending higher education and further education institutions were juniors, who accounted for under 1% of all student weeks in the sector.
- While the average course duration of adult students dropped from 11.6 weeks in 2020 to 11.0 weeks in 2021, this is still longer than the pre-pandemic average. The average for junior students remained unchanged, at 2.3 weeks.
- The top five sending markets for the state sector were China (41.2% of student weeks), Romania (12.7%), Poland (6.4%), Saudi Arabia (5.4%) and Spain (2.7%).
- In the state sector, more than two thirds (71%) of students attended classes either fully online in the UK (9%) or outside the UK (62%), while 18% studied via blended classes (face-to-face then switching to online, or vice versa).
- English UK's state sector members additionally taught 4,881 part-time English language students for a total of 46,859 student weeks.

Private Sector Member Centres

- In 2021, the 298 reporting private sector members taught 40,605 full-time students, who accounted for a total of 320,961 student weeks.
- The private sector experienced a sharper decline in the overall number of students (-42%) than in student weeks (-15%) between 2020 and 2021. These figures do not reflect fluctuations in English UK membership.
- The under-18 age band comprised 11% of all students and 5% of weeks in the sector. Junior students enrolled in 89 private sector centres, with a per member centre average of 50 students. The average number of adults per member centre stood at 191.
- Students studying at private sector providers opted for longer stays. The average course duration for adults increased from 5.4 weeks in 2020 to 7.9 weeks in 2021. The average course duration of junior students stood at 3.6 weeks in 2021.
- The top five sending markets in 2021 were Saudi Arabia (20% of total student weeks), Kuwait (9.8%), Japan (7.5%), France (6%) and Switzerland (5.5%).
- English UK private sector members also taught 6,325 part-time students.

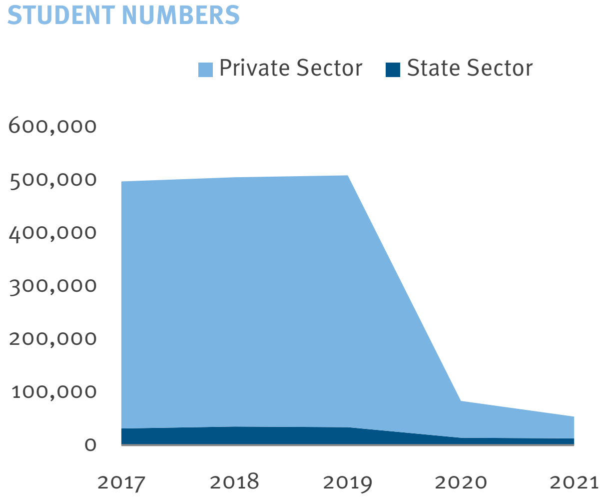
GENERAL OVERVIEW

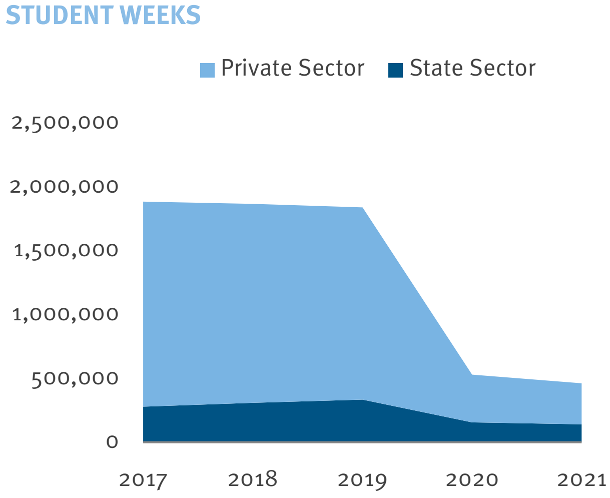
THE UK AT A GLANCE

The data reported in this section refers to full-time English language students. Information on part-time students can be found on pages 32 and 33. The 2021 English UK membership comprised 341 member centres; the current report builds on data provided by 339 of them. This contrasts with 346 centres in 2020, of which 333 reported data.

The ongoing Covid pandemic continued to cause severe turbulence in the UK English Language Teaching (ELT) sector. Overall, English UK member centres taught 53,616 international English language students, who spent a total of 462,046 student weeks at English UK member centres in 2021.

Chart 1: Overall number of students (2017-2021) and student weeks (2017-2021) taught by English UK member centres





Source: English UK, 2017–2021

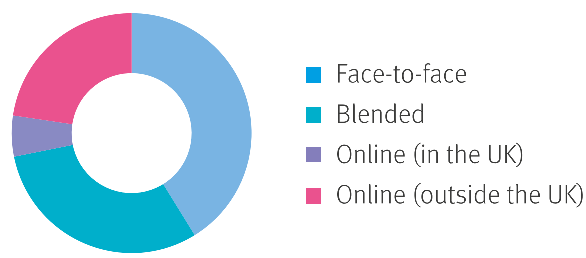
Note: The number of member centres fluctuated over the measured period. Please see Chart 3 for more details.

Following an 83.6% decline in the number of English language students enrolled in English UK member centres during 2020, the sector experienced a further 35.7% decrease in 2021. The total number of student weeks delivered by members declined from 530,756 in 2020 to 462,046 in 2021, which, according to unadjusted figures, represents a 12.9% y-o-y drop. According to 325 centres reporting in both 2019 and 2021, the sector experienced an 88% drop in student numbers and a 71% decrease in student weeks over the measured period.

The private sector represented 88% of the association's membership and had the dominant market share, accounting for 76% of all students and 69% of all student weeks spent at English UK member centres.

With travel restrictions still in place in the first half of 2021, data was again collected this year to examine the impact the Covid-19 pandemic had on teaching delivery methods.

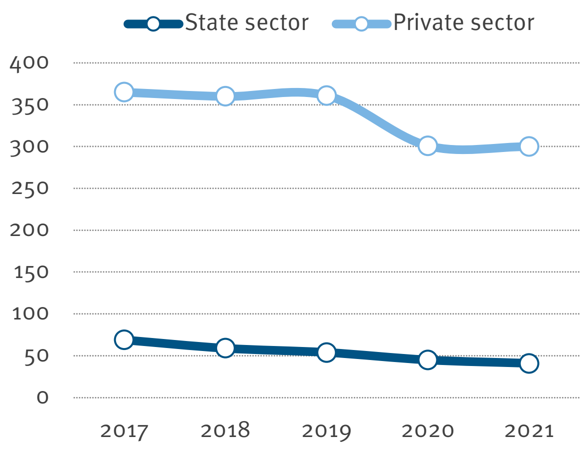
Chart 2: Student numbers by mode of tuition



Source: English UK, 2021; n=339

Member centres experienced an increase in the share of students taking online courses, from 20% in 2020 to 28% in 2021. Almost one in three students (31%) studied a blended model, while 41% of students studied face-to-face in 2021.

Chart 3: Number of English UK member centres by sector



Source: English UK, 2017-2021

In contrast to 2020, there was much greater stability in the membership base. From the unprecedented 69 centre decline (to 346) in 2020, 2021 saw an overall decrease of only 5 centres.

An analysis of member centres in both 2020 and 2021 was conducted to offset the fluctuations in English UK membership and provide a more accurate insight into y-o-y performance.

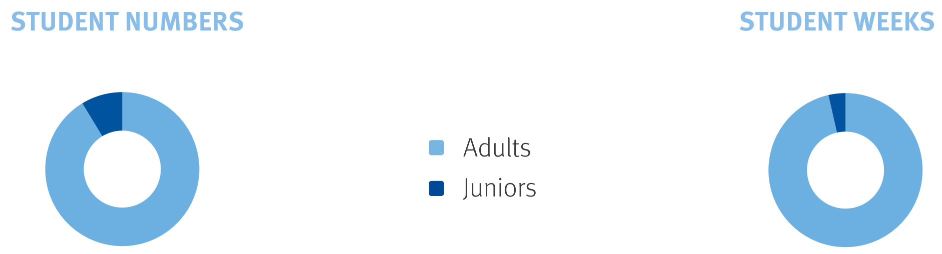
For 2021, the comparison of members reporting in both 2020 and 2021 confirms a continued decrease in real terms in both student weeks (-15%) and student numbers (-36.3%).

Table 1: Like-to-like comparison of 2021 vs 2020

	Student numbers	Student weeks
2020 (n=319)	81,911	524,956
2021 (n=319)	52,151	446,475
Change (%)	-36.3%	-15.0%

Source: English UK, 2020-2021, n=319

Chart 4: Share of adults and juniors out of the total number of students and student weeks taught by English UK member centres



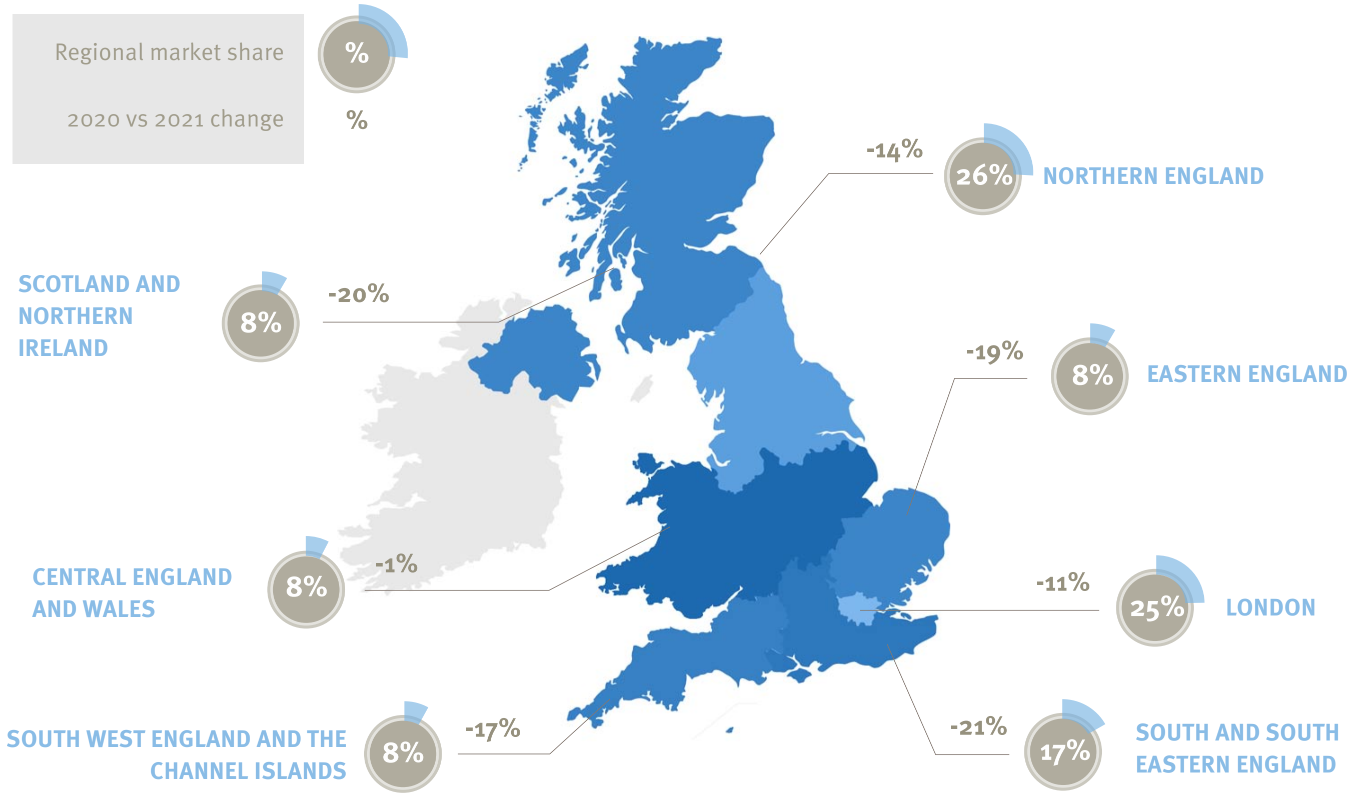
Source: English UK, 2021; n=339 member centres

The proportion of junior students shifted even further, with under-18 learners representing 9% (compared to 23% in 2020 and 54% in 2019) of the whole student population at the English UK membership in 2021. Junior students generated 16,476 student weeks, which is a decrease of 56% on 2020 numbers.

However, the average length of stay of junior students increased, reaching 3.5 weeks from the 1.9 weeks seen in 2020. Similarly, adult learners tended to choose longer stays at English UK member centres – the average length of stay increased from 7.7 weeks in 2020 to 9.1 weeks in 2021.

REGIONAL OVERVIEW

Chart 5: Regional market share (student weeks, 2021) and 2020 vs 2021 change in student weeks



Source: English UK, 2021; n=339 members; y-o-y comparison based on 319 reporting centres.
Note: Percentages do not add up to 100% due to rounding. As in previous years, for seasonal multi-centres or year-round providers with separate seasonal provision, data was attributed according to the location of the headquarters; 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.

The analysis reveals that English UK member centres across the country experienced their second year of overall decline. However, not all regions performed equally.

According to data gathered from reporting member centres, Northern England recorded the highest number of student weeks in 2021, outperforming London as a top study destination for English language students (119,642 and 114,221 student weeks, respectively). In total, the two regions together accounted for 51% of student weeks spent at English UK member centres in 2021.

A comparison of centres participating in 2020 and 2021 showed that South & South Eastern England recorded the largest decrease in terms of student weeks in 2021, both percentage-wise (-21%) and in absolute numbers (-19,939 weeks) over 2020.

Central England and Wales saw the lowest y-o-y decrease of student weeks of all regions, recording 291 (-1%) fewer student weeks in 2021 than in the previous year.

GENERAL OVERVIEW

TOP SOURCE MARKETS

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

Rank	Country	Student weeks (2020) n=327	Student weeks (2021) n=336	Share (%, 2021)	Student numbers (2020) n=327	Student numbers (2021) n=336	Share (%, 2021)	Average length of stay (2021)
1	Saudi Arabia	79,498	71,773	15.5%	6,485	5,931	11.1%	12.1
2	China	80,184	69,168	15.0%	9,366	8,506	15.9%	8.1
3	Kuwait	13,346	35,299	7.6%	1,252	2,878	5.4%	12.3
4	Japan	24,247	25,139	5.4%	3,253	2,505	4.7%	10.0
5	France	27,143	19,779	4.3%	4,825	3,316	6.2%	6.0
6	Romania*	1,962	18,610	4.0%	207	1,080	2.0%	17.2
7	Italy	28,859	18,102	3.9%	11,504	3,381	6.3%	5.4
8	Switzerland	16,213	17,945	3.9%	2,649	2,894	5.4%	6.2
9	Spain	21,771	15,977	3.5%	6,169	2,207	4.1%	7.2
10	Turkey	16,711	14,510	3.1%	1,994	1,490	2.8%	9.7
11	Poland	10,984	10,325	2.2%	918	791	1.5%	13.1
12	Russia	9,078	9,814	2.1%	2,309	2,147	4.0%	4.6
13	Mexico	4,516	8,217	1.8%	551	998	1.9%	8.2
14	South Korea	17,349	8,096	1.8%	1,806	898	1.7%	9.0
15	Germany	10,100	7,422	1.6%	3,448	1,944	3.6%	3.8
16	Other Asia / Far East	2,303	7,326	1.6%	180	489	0.9%	15.0
17	Brazil	17,334	6,839	1.5%	3,728	1,015	1.9%	6.7
18	Oman	5,478	5,444	1.2%	445	321	0.6%	17.0
19	Chile	7,144	5,299	1.1%	1,220	544	1.0%	9.7
20	Thailand	6,999	5,021	1.1%	732	475	0.9%	10.6

Source: English UK, 2021; performance based on statistics collected from the entire sample for 2021 n=336, for 2020 n=327
***Note:** Please note, that the majority of student weeks from Romania were sourced from a single member institution.

In 2021, the top 20 source markets accounted for 82% of all student weeks and student numbers at both private and state sector English UK member centres. In 2021, 13 of the top 20 source markets experienced a further y-o-y drop over 2020.

Looking at individual source markets, Saudi Arabia outperformed China and became the top sending country in terms of student weeks (71,773, despite a y-o-y decrease of 7,725 weeks between 2020 and 2021). Kuwait jumped to the third spot, delivering 35,299 student weeks, and experienced a y-o-y increase of 21,953 weeks compared to 2020. On the other hand, percentage-wise, Brazil experienced the largest y-o-y drop, with 61% fewer weeks spent in 2021 than in 2020.

Among the top 20 nationalities, European countries accounted for 26% of all students and one third (33%) of weeks delivered in 2021. While in 2019, three EU countries ranked among the top five nationalities, in 2021 only France did so. In 2021, the EU accounted for 29% of all students and 24% of all student weeks.

Except for Saudi Arabia, China and South Korea, all the other top 20 source markets saw an increase in the average length of stay in 2021 compared to 2020. As in 2020, the shorter-stay market, including students from outside the top 20 markets, was most affected by the pandemic, as students who were willing to travel opted for longer stays.

GENERAL OVERVIEW

TOP SOURCE MARKETS

The overview in tables 3 and 4 below provide a better understanding of top student nationalities by sector in each UK region. There was more volatility in the top ten markets at the regional level which is to be expected.

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

Rank	Central England and Wales n=10		London and Eastern England n=8		Northern England n=9	
1	China	13,869	Romania	17,022	China	36,595
2	Saudi Arabia	1,776	China	7,036	Saudi Arabia	4,564
3	Nigeria	824	Poland	2,924	Kuwait	3,091
4	South Korea	737	Saudi Arabia	995	Other Asia / Far East	612
5	Hong Kong	515	Other Asia	864	Taiwan	525
6	Oman	434	Turkey	627	Kazakhstan	499
7	Taiwan	313	Italy	492	Thailand	417
8	Kuwait	280	Bulgaria	484	Pakistan	370
9	Other Africa	253	United Kingdom	424	Nigeria	332
10	Japan	221	Kuwait	392	Other Africa	200

Rank	Scotland and Northern Ireland n=5		South and South Eastern England n=8		South West England and The Channel Islands n=0	
1	Poland	6,122	Germany	1,126	n/a	n/a
2	Spain	3,362	Netherlands	608	n/a	n/a
3	Syria	2,453	Japan	547	n/a	n/a
4	Other Africa	2,114	France	404	n/a	n/a
5	Bulgaria	2,043	China	358	n/a	n/a
6	Italy	1,930	Spain	205	n/a	n/a
7	Vietnam	1,486	Saudi Arabia	166	n/a	n/a
8	United Kingdom	1,184	Switzerland	135	n/a	n/a
9	Romania	917	Italy	135	n/a	n/a
10	Hungary	802	Belgium	118	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 2021.
Note: For seasonal multi-centres or year-round providers with separate seasonal provision, as annual statistical declarations are made on a membership basis (rather than for each individual teaching premise location) data was attributed according to the location of the headquarters. The results per region might, therefore, be distorted.
Source: English UK, 2021; n=40 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=19		Eastern England n=27		London n=72		Northern England n=37	
1	Saudi Arabia	6,216	Saudi Arabia	1,864	Japan	12,222	Saudi Arabia	24,140
2	Kuwait	1,561	Japan	1,427	Saudi Arabia	7,331	Kuwait	18,053
3	Qatar	849	France	1,203	Turkey	7,136	China	3,598
4	Japan	670	Turkey	1,000	France	6,515	France	2,562
5	Spain	623	Switzerland	974	Italy	6,447	Oman	2,177
6	Iran	394	Italy	970	Russia	4,595	Italy	2,135
7	Turkey	311	China	895	Other Asia	4,584	Switzerland	1,721
8	France	276	Spain	679	Brazil	4,251	Japan	1,667
9	Italy	264	Mexico	623	Switzerland	3,928	Turkey	1,558
10	Other Africa	253	Germany	457	China	3,777	Spain	1,426

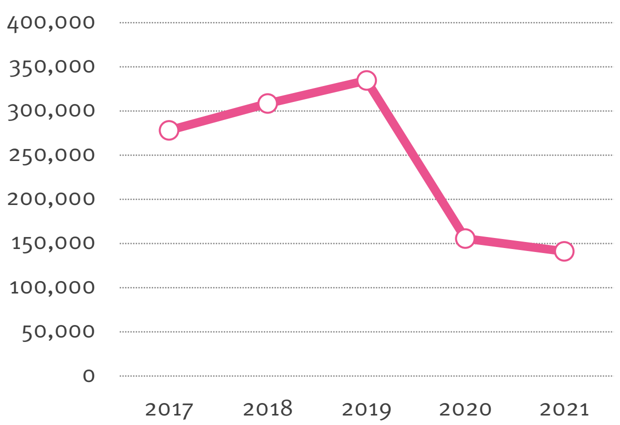
Rank	Scotland and Northern Ireland n=15		South and South Eastern England n=73		South West England and The Channel Islands n=53	
1	Saudi Arabia	2,034	Saudi Arabia	12,618	Saudi Arabia	9,909
2	France	1,758	Switzerland	7,779	Kuwait	4,720
3	Oman	1,184	Japan	5,958	Switzerland	2,724
4	Kuwait	509	France	5,545	Spain	1,981
5	Switzerland	450	Kuwait	4,787	Japan	1,811
6	Italy	442	Italy	3,915	China	1,509
7	United Kingdom	406	Spain	3,728	Russia	1,481
8	Spain	324	Mexico	3,655	Italy	1,329
9	China	293	Germany	2,397	France	1,306
10	Japan	285	Chile	2,156	Oman	1,016

Note: In order to maintain the confidentiality of individual centre data, some of the regions were merged.
Note: For seasonal multi-centres or year-round providers with separate seasonal provision, as annual statistical declarations are made on a membership basis (rather than for each individual teaching premise location) data was attributed according to the location of the headquarters. The results per region might, therefore, be distorted.
Source: English UK, 2021; n=296 member centres

STATE SECTOR MEMBER CENTRES

MARKET OVERVIEW

Chart 6: Student weeks taught by English UK state sector members



Note: The number of member centres fluctuated over the measured period. Please see Chart 3 for more details.
Source: English UK, 2017-2021

Table 5: Student numbers by mode of tuition

Mode of tuition (n=41)	% of students
Face-to-face	11%
Blended	18%
Online (in the UK)	9%
Online (outside the UK)	62%

Source: English UK, 2021; n=41 state sector member centres

While in 2020, 37% of students studied via a blended method, in 2021 the ratio decreased to 18%. On the other hand, there was an increase in students receiving their classes fully online in 2021. Almost two thirds of all students in 2021 studied online either in (9%) or outside (62%) the UK, increasing from 6% and 43% in 2020, respectively.

Only 11% of students were taught all of their language course face-to-face. The state sector experienced a higher share of students studying online than the private sector (71% vs 15%).

The English UK state sector encompasses 41 language centres: 20 higher education institutions and 21 further education providers. Overall, the state sector taught 13,011 English language students, which represents a decline of 5.7% over 2020, and registered a total of 141,085 student weeks (a 9.2% drop compared to 2020).

Twenty-nine percent of state sector providers experienced growth in student weeks between 2020 and 2021. On the other hand, 65% of them witnessed a drop in student weeks, and 5% saw no change. Additionally, 44% of state sector providers saw over 1,000 student weeks spent at their teaching centres in 2021.

Comparing statistics submitted by members who reported their data in both 2020 and 2021, the analysis points to a deeper downturn in 2021 in student numbers and student weeks over 2020.

Table 6: Like-to-like comparison of 2021 vs 2020

	Student numbers	Student weeks
2020 (n=37)	13,766	155,078
2021 (n=37)	11,837	128,992
Change (%)	-14.0%	-16.8%

Source: English UK, 2020-2021; n=37 state sector member centres

Table 7: Student numbers by visa type (state sector)

Visa type (n=41)	% of students
Tier 4 visa	82%
Short-term study (6 months) visa	5%
Short-term study (11 months) visa	5%
Other types of visa	8%

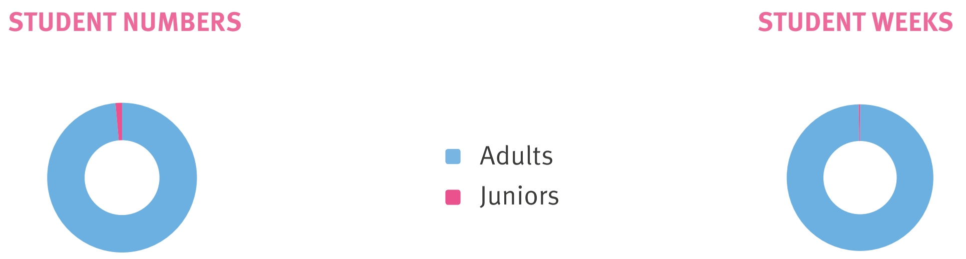
Source: English UK, 2021; n=41 state sector member centres

In 2021, state sector centres primarily hosted Tier 4 students (82%), followed by students with other types of visas (8%), 11-month visas (5.4%) and 6-month visa (5.4%). This is a marked change to 2020 when 38% were Tier 4 and almost one third enrolled under Short-terrm (6-month adult visa).

STATE SECTOR MEMBER CENTRES

ADULT VS JUNIOR SEGMENT

Chart 8: Share of adults and juniors out of the total number of students and student weeks in the UK (state sector)

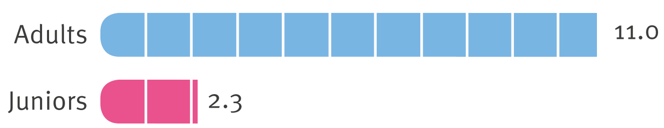


Source: English UK, 2021; n=41 state sector member centre

Adult learners remain heart of English UK's higher education and further education institutions, accounting for 99% of all students and student weeks in 2021.

In 2021, only four centres within the English UK state sector membership, taught juniors, who accounted for a total of 430 student weeks.

Chart 9: Average length of stay (weeks, state sector)



Source: English UK, 2021; n=41 state sector member centres

The overall increase in the average length of stay within the English UK membership was predominantly driven by the private sector.

A closer look at the state sector indicates that, there, overall course duration averaged at 10.8 weeks in 2021, a decrease on the 11.3 weeks of 2020.

While the average length of stay of adult students dropped from 11.6 weeks in 2020 to 11 weeks in 2021, the average for junior students remained unchanged, as the vast majority of juniors opted for two-week courses.

STATE SECTOR MEMBER CENTRES

SOURCE REGIONS

Table 8: Student weeks, students and average length of stay (weeks) by source region (state sector, rank by student weeks)

Country/region	Student weeks (2020) n=39	Student weeks (2021) n=40	Student numbers (2020) n=39	Student numbers (2021) n=40	Average length of stay (2021)	Change in student weeks (%) n=34	Change in student numbers (%) n=34
	Overall data					Like-to-like comparison	
Asia	72,274	70,295	8,086	8,447	8.3	-17.5%	-10.4%
Eastern Europe	18,813	33,233	809	1,726	19.3	-33.8%	-26.0%
Middle East	20,364	18,197	1,388	1,372	13.3	-23.8%	-10.5%
Western Europe	17,608	12,538	1,583	1,044	12.0	-33.3%	-10.5%
Africa	4,515	5,176	257	271	19.1	12.5%	2.0%
LATAM	2,174	1,325	191	98	13.5	-42.1%	-52.4%
North America	190	286	14	22	13.0	13.7%	42.9%
Australasia	35	35	3	3	11.7	0.0%	0.0%

Source: English UK, 2021; n=40 state sector member centres in 2021, n=39 state sector member centres in 2020 (y-o-y changes are based on a sample of 34 providers reporting in both 2020 and 2021 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 2020 and 2021 was used, as using unadjusted data would have inflated the change for some nationalities or regions.

Students from Asia accounted for half (50%) of all student weeks spent at state sector providers in 2021.The region produced a total of 70,295 weeks: 17.5% fewer than in 2020.

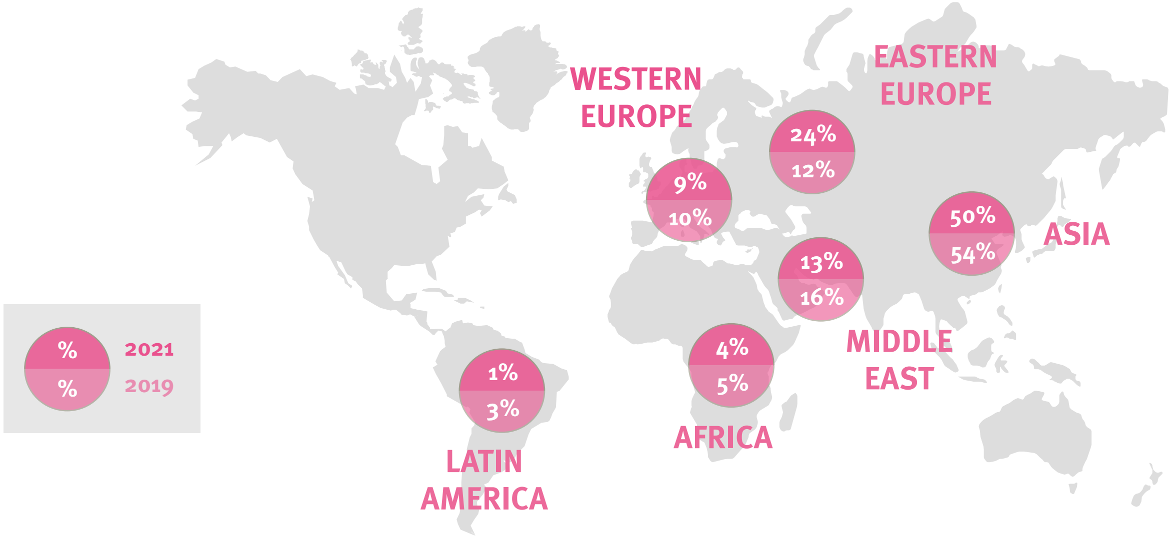
Eastern Europe outperformed the Middle East as the second-largest source region for the state sector, accounting for 33,233 student weeks, driven predominantly by students from Romania, Poland and Bulgaria at a few individual providers.

Furthermore, the highest average length of stay (19.3 weeks) was recorded among students from Eastern Europe although this was a drop from the 23.3 weeks of 2020.

A comparison of 34 centres reporting in both 2020 and 2021 shows that LATAM experienced the largest percentage-wise drop in student weeks, down by 42.1% student weeks. Except for Peru and Panama, all markets in the LATAM region experienced a decrease during the measured period. On the other hand, Asia experienced the biggest y-o-y decrease in absolute terms (-12,632 weeks), driven by the drop in student weeks delivered by China and Japan.

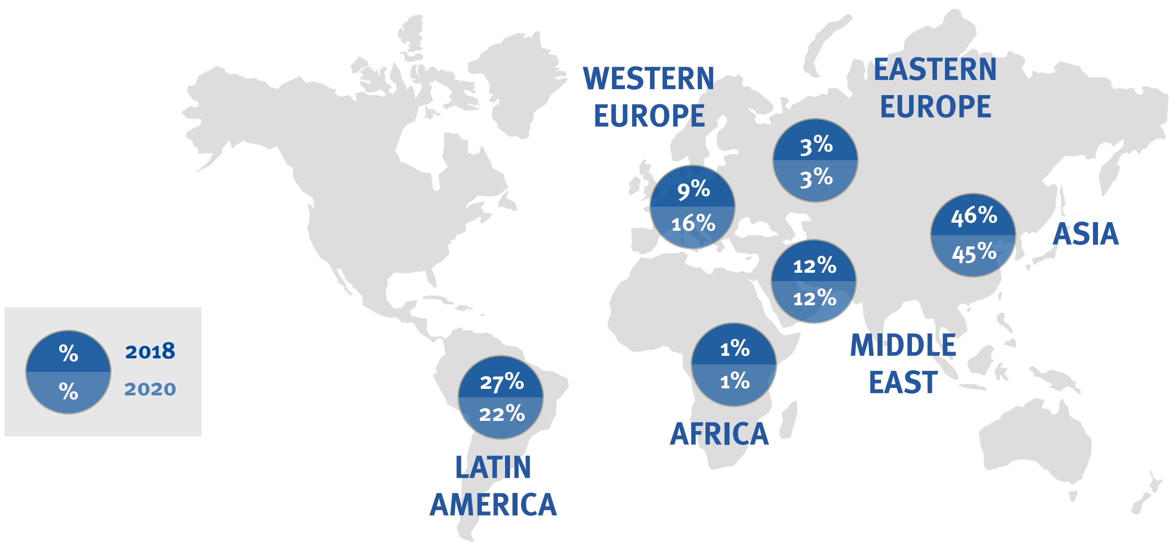
In contrast, Africa and North America were the only regions experiencing a y-o-y increase of both student weeks and number of students for state sector providers.

Chart 10: Source region market shares (UK ELT, student weeks at state sector centres, 2019 vs 2021)



Source: English UK, 2021
Note: A comparison of 2019 and 2021 figures does not reflect fluctuation in English UK membership. Please see Chart 3 for more details.

Chart 11: Source region market shares (global ELT, student weeks, 2018 vs 2020)



Source: BONARD, 2021
Note: Global data for 2021 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

Despite a y-o-y decrease of 18.4% (-10,950) in student weeks caused by the ongoing effects of the pandemic, China remained the largest source market for state sector providers in 2021. Romania outperformed Poland as the second largest source market, at 13% of students and 7% of student weeks, followed by Poland (6%), Saudi Arabia (5%), Spain and Kuwait (3%). In a like-to-like comparison between 2020 and 2021, 37 of the 114 source markets showed growth, including Kuwait, Vietnam, Nigeria, Taiwan and Pakistan. Eleven remained stable, and 66 saw a y-o-y decrease.

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

Rank	Country/region	Student weeks (2020) n=39	Student weeks (2021) n=40	Student numbers (2020) n=39	Student numbers (2021) n=40	Average length of stay (2021)	Change in student weeks (%) n=34	Change in student numbers (%) n=34
		Overall data					Like-to-like comparison	
1	China	59,468	58,062	6,520	7,231	8.0	-18.4%	-4.2%
2	Romania	1,438	17,962	64	953	18.8	-33.0%	-37.5%
3	Poland	9,493	9,054	392	396	22.9	-35.4%	-38.5%
4	Saudi Arabia	8,940	7,661	639	773	9.9	-37.7%	4.7%
5	Spain	6,733	3,820	354	185	20.6	-44.4%	-48.4%
6	Kuwait	3,060	3,810	229	214	17.8	23.9%	-7.4%
7	Other Africa	3,091	2,736	164	137	20.0	-12.8%	-18.4%
8	Syria	3,293	2,619	159	107	24.5	-21.4%	-34.0%
9	Italy	3,800	2,600	538	129	20.2	-41.1%	-79.7%
10	Bulgaria	3,422	2,530	127	105	24.1	-39.2%	-38.6%
11	Other Asia / Far East	1,204	2,434	57	205	11.9	38.0%	36.8%
12	United Kingdom	2,180	1,799	118	96	18.7	-18.2%	-19.5%
13	Vietnam	1,229	1,757	61	83	21.2	36.5%	19.7%
14	Turkey	2,334	1,436	168	102	14.1	-56.2%	-50.0%
15	Nigeria	307	1,282	27	65	19.7	485.3%	357.1%
16	South Korea	2,081	1,204	277	170	7.1	-41.3%	-40.4%
17	Germany	1,275	1,203	290	305	3.9	-5.6%	5.2%
18	Taiwan	805	1,179	85	144	8.2	41.2%	63.5%
19	Japan	4,303	1,099	784	164	6.7	-73.4%	-78.4%
20	Pakistan	791	1,062	49	92	11.5	14.2%	12.2%
21	Hungary	688	961	35	45	21.4	19.6%	0.0%
22	Hong Kong	419	896	32	78	11.5	108.1%	134.4%
23	Thailand	666	856	58	93	9.2	18.3%	52.6%
24	Iraq	965	763	59	46	16.6	-22.4%	-22.8%
25	India	635	708	102	79	9.0	-6.8%	-58.8%

- **Overall data** – performance of source markets based on statistics collected from the entire sample (40 in 2021 and 39 in 2020);
- **Like-to-like comparison** – y-o-y benchmark based on data from centres reporting in both 2020 and 2021 (34 centres) for a more accurate assessment of source market performance trends.

The average length of stay among the top 20 nationalities was 10.8 weeks, with students from Syria studying for the longest period of time (24.5 weeks). In contrast, students from Germany studied for 3.9 weeks, on average. Students from Estonia, Belarus and Bolivia recorded one of the highest average lengths of stay, studying for 27 weeks on average. The EU market accounted for 30% of all weeks spent in the state sector. Furthermore, EU students spent, on average, 16.9 weeks, whilst non-EU students stayed 9.4 weeks.

Rank	Country/region	Student weeks (2020) n=39	Student weeks (2021) n=40	Student numbers (2020) n=39	Student numbers (2021) n=40	Average length of stay (2021)	Change in student weeks (%) n=34	Change in student numbers (%) n=34
		Overall data					Like-to-like comparison	
26	Netherlands	412	697	49	131	5.3	69.2%	167.3%
27	France	1,113	614	99	66	9.3	-45.4%	-34.3%
28	Portugal	1,033	609	57	29	21.0	-43.9%	-54.4%
29	Russia	509	597	40	96	6.2	10.4%	137.5%
30	Kazakhstan	69	548	12	45	12.2	650.7%	258.3%
31	Iran	564	530	44	31	17.1	-24.6%	-36.4%
32	Latvia	1,144	530	38	21	25.2	-57.9%	-52.6%
33	Oman	236	472	17	32	14.8	100.0%	88.2%
34	Libya	486	423	20	17	24.9	-13.0%	-15.0%
35	Greece	378	406	22	28	14.5	-32.8%	-27.3%
36	Lithuania	412	381	20	25	15.2	-33.7%	-40.0%
37	Brazil	642	332	42	23	14.4	-50.2%	-47.6%
38	Egypt	262	320	21	23	13.9	11.5%	4.8%
39	Slovakia	331	312	14	13	24.0	-9.4%	-14.3%
40	Morocco	217	252	14	16	15.8	-22.5%	-51.9%
41	United Arab Emirates	387	241	29	19	12.7	-37.7%	-34.5%
42	Czech Republic	398	230	18	27	8.5	-42.2%	50.0%
43	Peru	163	216	10	16	13.5	32.5%	60.0%
44	Switzerland	203	206	17	23	9.0	1.5%	35.3%
45	Mexico	218	185	42	18	10.3	-31.2%	-59.5%
46	Jordan	162	184	12	16	11.5	13.6%	33.3%
47	USA	98	182	9	17	10.7	85.7%	88.9%
48	Albania	148	179	10	12	14.9	20.9%	20.0%
49	Indonesia	85	163	9	33	4.9	91.8%	266.7%
50	Belgium	290	154	23	11	14.0	-46.9%	-52.2%

- **Overall data** – performance of source markets based on statistics collected from the entire sample (40 in 2021 and 39 in 2020);
- **Like-to-like comparison** – y-o-y benchmark based on data from centres reporting in both 2020 and 2021 (34 centres) for a more accurate assessment of source market performance trends.

STATE SECTOR MEMBER CENTRES

SOURCE MARKETS

Rank	Country/region	Student weeks (2020) n=39	Student weeks (2021) n=40	Student numbers (2020) n=39	Student numbers (2021) n=40	Average length of stay (2021)	Change in student weeks (%) n=34	Change in student numbers (%) n=34
				Overall data			Like-to-like comparison	
51	Nepal	122	140	7	13	10.8	-8.2%	-28.6%
52	Lebanon	83	133	6	9	14.8	60.2%	50.0%
53	Other Central America	215	132	10	8	16.5	-38.6%	-20.0%
54	Cyprus	256	128	20	11	11.6	-53.9%	-50.0%
55	Venezuela	252	126	12	6	21.0	-50.0%	-50.0%
56	Ukraine	230	122	14	11	11.1	-47.0%	-21.4%
57	Denmark	21	115	1	19	6.1	-4.8%	0.0%
58	Other Middle East	11	110	1	7	15.7	900.0%	600.0%
	Sweden	62	110	4	7	15.7	58.1%	50.0%
60	Chile	154	104	30	12	8.7	-45.5%	-73.3%
61	Bahrain	122	90	10	5	18.0	-26.2%	-50.0%
62	Algeria	135	84	9	7	12.0	-40.7%	-33.3%
63	Estonia	84	82	3	3	27.3	-2.4%	0.0%
64	Malaysia	99	70	8	6	11.7	-29.3%	-25.0%
	Other North America	0	70	0	2	35.0	n/a	n/a
66	Angola	12	61	1	5	12.2	408.3%	400.0%
67	Macedonia	34	60	2	3	20.0	29.4%	0.0%
68	Belarus	105	54	3	2	27.0	-48.6%	-33.3%
	Bolivia	38	54	2	2	27.0	42.1%	0.0%
	Palestine	26	54	3	3	18.0	107.7%	0.0%
71	Moldova	20	51	1	3	17.0	-45.0%	0.0%
72	Ecuador	109	44	11	4	11.0	-59.6%	-63.6%
73	Finland	17	42	2	3	14.0	-29.4%	-50.0%
	Ireland	56	42	3	3	14.0	-25.0%	0.0%
	Yemen	88	42	7	2	21.0	-52.3%	-71.4%
76	Argentina	157	36	16	2	18.0	-77.1%	-93.8%
77	Australia	24	35	2	3	11.7	45.8%	50.0%
78	Canada	92	34	5	3	11.3	-63.0%	-40.0%
79	Austria	8	32	2	2	16.0	300.0%	0.0%
	Other South America	36	32	5	2	16.0	-11.1%	-60.0%
81	Norway	11	30	2	2	15.0	63.6%	-50.0%
	Qatar	63	30	4	3	10.0	-52.4%	-25.0%

- **Overall data** – performance of source markets based on statistics collected from the entire sample (40 in 2021 and 39 in 2020);
- **Like-to-like comparison** – y-o-y benchmark based on data from centres reporting in both 2020 and 2021 (34 centres) for a more accurate assessment of source market performance trends.

Rank	Country/region	Student weeks (2020) n=39	Student weeks (2021) n=40	Student numbers (2020) n=39	Student numbers (2021) n=40	Average length of stay (2021)	Change in student weeks (%) n=34	Change in student numbers (%) n=34
		Overall data					Like-to-like comparison	
83	Panama	25	25	2	2	12.5	0.0%	0.0%
84	Philippines	64	23	9	2	11.5	-64.1%	-77.8%
85	Israel	30	22	1	3	7.3	-26.7%	200.0%
86	Colombia	161	21	8	2	10.5	-87.0%	-75.0%
87	Luxembourg	14	20	1	1	20.0	42.9%	0.0%
88	Tunisia	5	18	1	1	18.0	260.0%	0.0%
	Uruguay	0	18	0	1	18.0	n/a	n/a
90	Georgia	28	17	3	2	8.5	-39.3%	-33.3%
91	Cambodia	30	15	1	1	15.0	-50.0%	0.0%
	Iceland	2	15	1	2	7.5	650.0%	100.0%
93	Tajikistan	23	14	2	1	14.0	-39.1%	-50.0%
94	Armenia	0	12	0	1	12.0	n/a	n/a
	Macao	16	12	1	2	6.0	-25.0%	100.0%
	Monaco	0	12	0	1	12.0	n/a	n/a
	Mongolia	29	12	2	1	12.0	-58.6%	-50.0%
	Other Western Europe	0	12	0	1	12.0	n/a	n/a
99	Turkmenistan	12	12	1	1	12.0	0.0%	0.0%
100	Azerbaijan	34	0	2	0	n/a	-100.0%	-100.0%
	Bosnia and Herzegovina	0	0	0	0	n/a	n/a	n/a
	Costa Rica	0	0	0	0	n/a	n/a	n/a
	Croatia	60	0	4	0	n/a	-100.0%	-100.0%
	Kyrgyzstan	0	0	0	0	n/a	n/a	n/a
	Liechtenstein	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
	Other Australasia	11	0	1	0	n/a	-100.0%	-100.0%
	Other Eastern Europe	20	0	1	0	n/a	-100.0%	-100.0%
	Paraguay	4	0	1	0	n/a	-100.0%	-100.0%
	Serbia	21	0	3	0	n/a	-100.0%	-100.0%
	Singapore	0	0	0	0	n/a	n/a	n/a
	Slovenia	0	0	0	0	n/a	n/a	n/a
	Uzbekistan	62	0	4	0	n/a	-100.0%	-100.0%

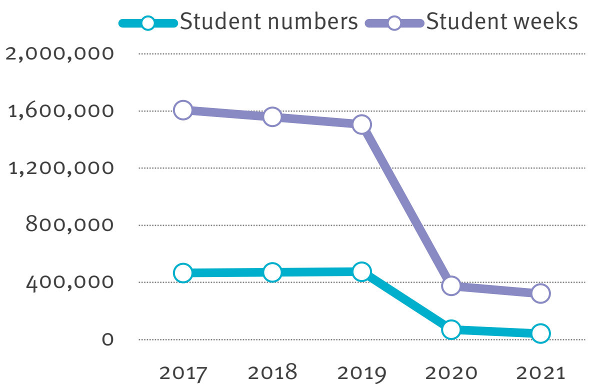
- **Overall data** – performance of source markets based on statistics collected from the entire sample (40 in 2021 and 39 in 2020);
- **Like-to-like comparison** – y-o-y benchmark based on data from centres reporting in both 2020 and 2021 (34 centres) for a more accurate assessment of source market performance trends.

Source: English UK, 2021

PRIVATE SECTOR MEMBER CENTRES

MARKET OVERVIEW

Chart 12: 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 3 for more details.
Source: English UK, 2017-2021

In 2021, the 298 reporting private sector members welcomed 40,605 students, who spent a total of 320,961 student weeks. According to unadjusted figures reflecting fluctuation in reporting member centres, the private sector experienced a sharper decline in the overall number of students (at 41.7%) than in student weeks (at 14.5%) between 2020 and 2021.

A closer look at individual providers indicates that 31% of private sector providers saw growth in student weeks between 2020 and 2021. On the other hand, more than half (55%) witnessed a drop in student weeks in 2021.

The top ten providers accounted for 31% of all weeks delivered and 29% of all students studying in the private sector.

A comparison of members reporting in both 2020 and 2021 resulted in the following benchmark. This illustrates clearly that private sector members continued to be severely impacted by the Covid pandemic, with the decline more dramatic than that seen in equivalent state sector figures.

Table 10: Student numbers by mode of tuition

Mode of tuition (n=298)	% of students
Face-to-face	51%
Blended	35%
Online (in the UK)	5%
Online (outside the UK)	10%

Source: English UK, 2021; n=298 private sector member centres

Table 11: Like-to-like comparison of 2020 vs 2021

	Student numbers	Student weeks
2020 (n=282)	68,145	369,878
2021 (n=282)	40,314	317,483
Change (%)	-40.8%	-14.2%

Source: English UK, 2021-2021, n=282

Compared to 2020 figures, the proportion of students able to study face-to-face declined from 57% to 51% in 2021. The number of students moved to online tuition remained at 15% whilst those that studied via the blended method increased its share from 30% in 2020 to 35% in 2021.

In early 2021, governments enforced strict measures and travel restrictions in response to the rise of the Delta variant of Covid-19. As a result, more members switched to developing, and offering, an alternative to the face-to-face courses students had originally booked.

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

Visa type (n=298)	% of students
Tier 4 visa	3%
Short-term study (6 months) visa	60%
Short-term study (11 months) visa	21%
Other types of visa	16%

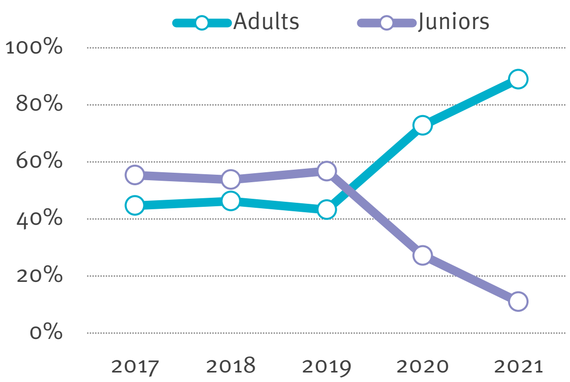
Source: English UK, 2021; n=298 private sector member centres

Most students in private sector centres (60%) held a short-term study visa (6 months) compared to 54% in 2020. Students holding an 11-month study visa accounted for 21% of all enrolments at private member centres. Sixteen percent of students studied under other types of visas.

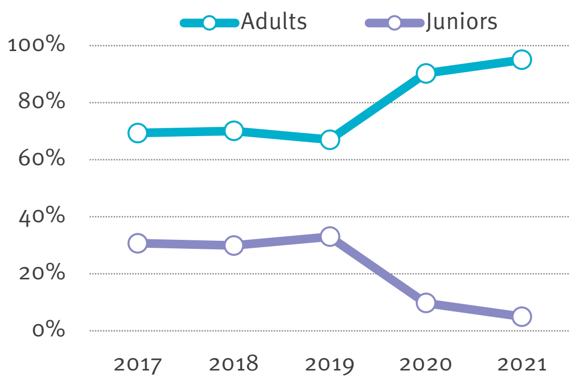
ADULT VS JUNIOR SEGMENT

Chart 14: Share of adults and juniors out of the total number of students and student weeks in the UK (private sector)

STUDENT NUMBERS



STUDENT WEEKS

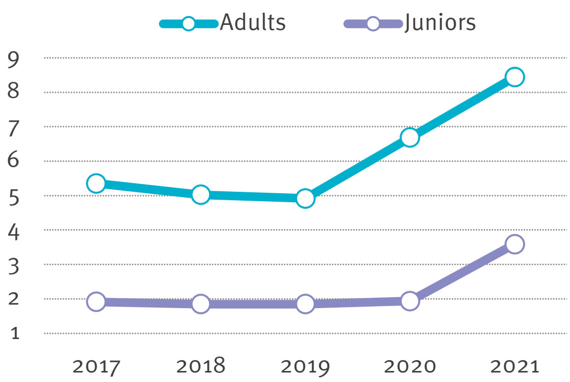


Note: The number of member centres fluctuated over the measured period. Please see Chart 3 for more details.
Source: English UK, 2017-2021

The junior segment continued to be heavily affected by the pandemic. For the second year running, the number of adult students studying ELT at private sector providers exceeded the number of under-18s. In 2021, junior students made up only 11% of all their English language learners, compared with 57% in 2019 and 27% in 2020.

In 2021, 89 reporting private centres taught junior students, catering for an average of 50 students per centre. This was down from an average of 169 students per centre in 2020 and 1,024 in 2019. Whilst the private sector enrolled 36,134 adult students, this was a decrease of 29% compared to 2020 (based on unadjusted figures).

Chart 15: Average length of stay (weeks, private sector)



Source: English UK, 2017-2021

While the private sector experienced a sharper percentage decrease in student numbers than the state sector, students studying at private providers opted for longer stays. The average length of stay increased from 5.4 weeks in 2020 to 7.9 weeks in 2021, the highest average length of stay ever recorded. In 2021, 32% of private sector providers reported that students studied for longer than the overall average length of stay in 2021.

Adult students studied an average of 8.4 weeks and juniors an average of 3.6 weeks.

Compared to pre-pandemic levels, the average length of stay increased by 4.7 weeks.

PRIVATE SECTOR MEMBER CENTRES

SOURCE REGIONS

Table 13: Student weeks, students and average length of stay (weeks) by source region (private sector, rank by student weeks)

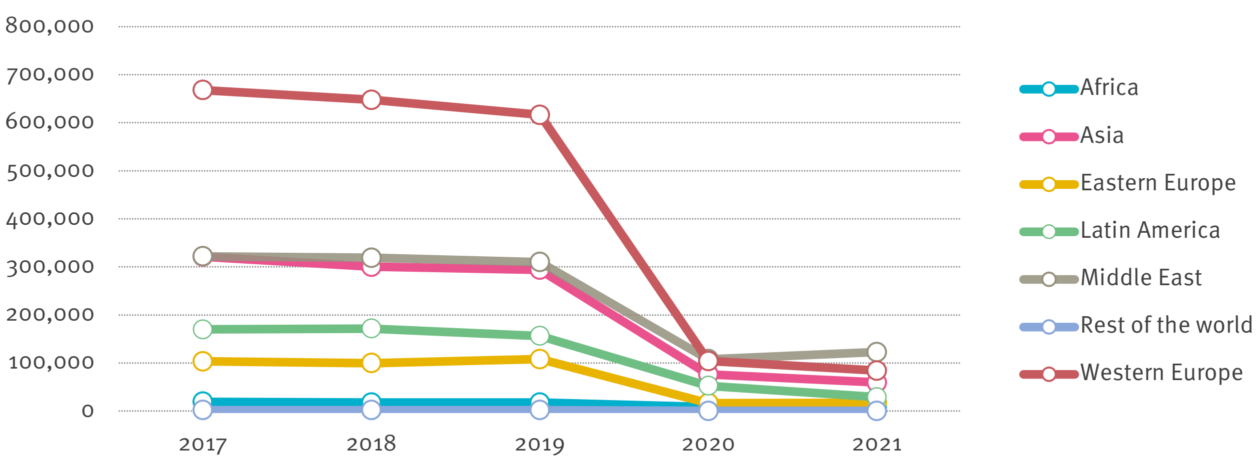
Country/region	Student weeks (2020) n=291	Student weeks (2021) n=296	Student numbers (2020) n=291	Student numbers (2021) n=296	Average length of stay (2021)	Change in student weeks (%) n=276	Change in student numbers (%) n=276
			Overall data			**Like-to-like comparison**	
Middle East	107,890	122,881	9,947	10,763	11.4	11.0%	4.0%
Western Europe	104,168	84,124	30,144	15,254	5.5	-19.5%	-49.7%
Asia	76,371	59,557	9,061	6,135	9.7	-24.4%	-37.6%
Latin America	52,639	29,082	9,196	3,464	8.4	-44.7%	-62.4%
Eastern Europe	16,737	17,551	4,362	4,027	4.4	1.3%	-11.5%
Africa	8,706	7,156	847	667	10.7	-19.0%	-23.9%
North America	363	319	54	59	5.4	-12.1%	9.3%
Australasia	34	91	7	9	10.1	167.6%	28.6%

Source: English UK, 2021; n=296 private sector member centres in 2021, n=291 private sector member centres in 2020 (y-o-y changes are based on a sample of 276 providers reporting in both 2020 and 2021 to provide a like-for-like comparison).

In the second year of the Covid-19 pandemic, the Middle East remained the top source region for the private sector within the English UK membership, accounting for 38% of all weeks and 27% of students in 2021.

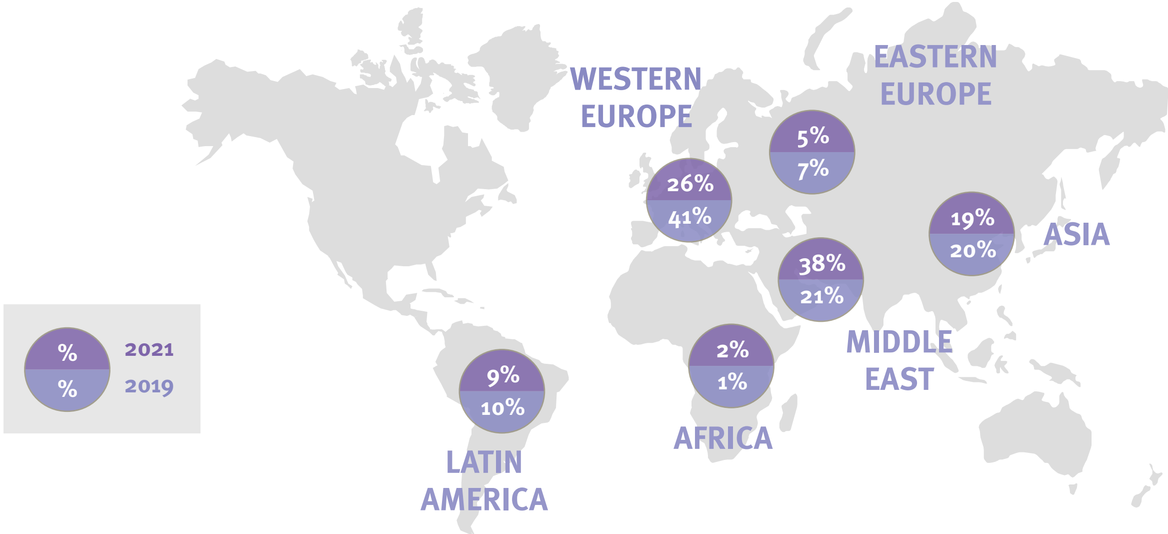
The largest y-o-y drops were witnessed in Latin America, where a 44.7% fall in student weeks was accompanied by a 62.4% slump in student numbers between 2020 and 2021. It was driven by a decrease in student numbers from Brazil, Argentina and Colombia, which cumulatively delivered 18,255 fewer weeks in 2021. In contrast, Middle Eastern countries sent 4% more students and delivered 11% more student weeks in 2021 than in 2020. At the same time, the highest length of stay was recorded among students from the Middle East, who stayed an average of 11.4 weeks, an increase from the 10.8 in 2020.

Chart 16: Student weeks by source region (2017-2021 private sector)



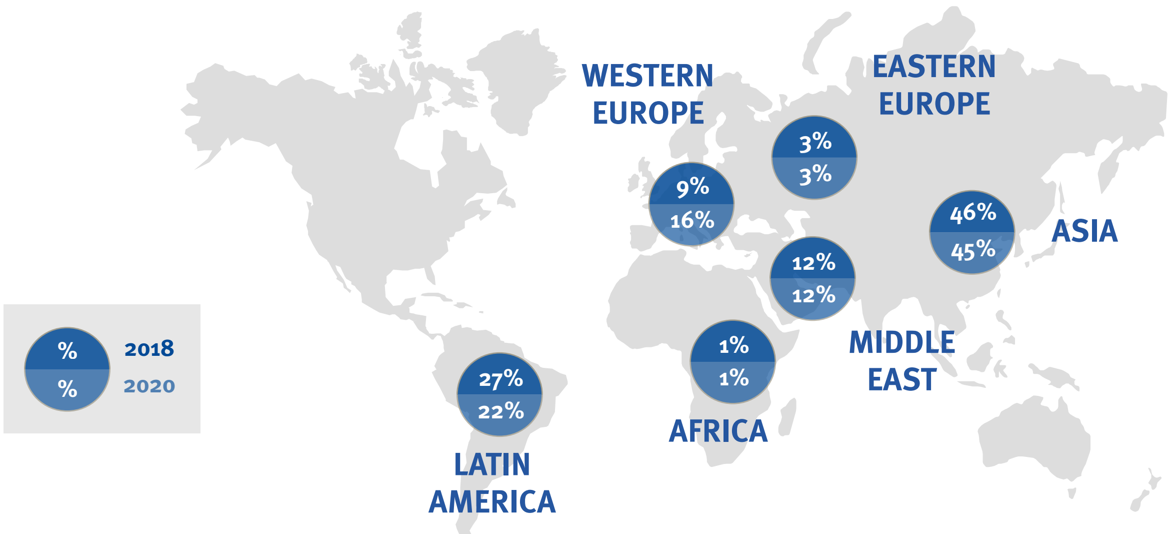
Note: The number of member centres fluctuated over the measured period. Please see Chart 3 for more details.
Source: English UK, 2017-2021

Chart 17: Source region market shares (UK ELT, student weeks at private sector centres, 2019 vs 2021)



Source: English UK, 2021
Note: A comparison of 2019 and 2021 figures does not reflect fluctuation in English UK membership. Please see Chart 3 for more details. Percentages do not add up to 100% due to rounding.

Chart 18: Source region market shares (global ELT, student weeks, 2018 vs 2020)



Source: BONARD, 2021
Note: Global data for 2021 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 64,112 weeks, Saudi Arabia remained the leading source market for private sector members. Kuwait followed, manifesting an extraordinary like-to-like growth of 207%, delivering 31,489 weeks and accounting for a 10% share at private member centres. After the sharp drop in student numbers between 2019 and 2020 from most source countries, the picture in 2021 shows more positive signs. Another notable increase was seen from Mexico, which delivered 8,032 student weeks in 2021. The number of students from Mexico studying at English UK private sector members almost doubled

Table 14: Student weeks, students and average length of stay (weeks) by source market (private sector, rank by student weeks)

Rank	Country/region	Student weeks (2020) n=291	Student weeks (2021) n=296	Student numbers (2020) n=291	Student numbers (2021) n=296	Average length of stay (2021)	Change in student weeks (%) n=276	Change in student numbers (%) n=276
		Overall data					Like-to-like comparison	
1	Saudi Arabia	70,558	64,112	5,846	5,158	12.4	-13.1%	-16.5%
2	Kuwait	10,286	31,489	1,023	2,664	11.8	207.0%	160.2%
3	Japan	19,944	24,040	2,469	2,341	10.3	17.5%	-11.0%
4	France	26,030	19,165	4,726	3,250	5.9	-26.3%	-31.1%
5	Switzerland	16,010	17,739	2,632	2,871	6.2	10.9%	8.3%
6	Italy	25,059	15,502	10,966	3,252	4.8	-37.2%	-69.6%
7	Turkey	14,377	13,074	1,826	1,388	9.4	-12.5%	-28.4%
8	Spain	15,038	12,157	5,815	2,022	6.0	-21.0%	-65.6%
9	China	20,716	11,106	2,846	1,275	8.7	-48.6%	-59.8%
10	Russia	8,569	9,217	2,269	2,051	4.5	5.9%	-11.5%
11	Mexico	4,298	8,032	509	980	8.2	86.4%	92.2%
12	South Korea	15,268	6,892	1,529	728	9.5	-57.4%	-59.3%
13	Brazil	16,692	6,507	3,686	992	6.6	-61.1%	-73.3%
14	Germany	8,825	6,219	3,158	1,639	3.8	-29.8%	-49.0%
15	Chile	6,990	5,195	1,190	532	9.8	-25.7%	-55.4%
16	Oman	5,242	4,972	428	289	17.2	-4.2%	-32.0%
17	Other Asia / Far East	1,099	4,892	123	284	17.2	370.8%	136.7%
18	Thailand	6,333	4,165	674	382	10.9	-36.4%	-46.3%
19	Colombia	7,400	3,435	696	289	11.9	-53.7%	-58.1%
20	Belgium	3,561	2,832	769	376	7.5	-20.2%	-50.8%
21	Sweden	2,153	2,516	200	241	10.4	15.7%	16.3%
22	Qatar	2,254	2,086	208	150	13.9	-12.7%	-35.3%
23	Ukraine	2,079	2,084	523	618	3.4	-4.0%	14.4%
24	United Kingdom	1,257	2,046	241	401	5.1	37.4%	16.1%
25	Netherlands	2,308	2,010	527	315	6.4	-13.6%	-41.3%

- **Overall data** – performance of source markets based on statistics collected from the entire sample (296 in 2021 and 291 in 2020);
- **Like-to-like comparison** – y-o-y benchmark based on data from centres reporting in both 2020 and 2021 (276 centres) for a more accurate assessment of source market performance trends.

in the course of a year (+92%). In terms of student weeks, Japan and Switzerland also grew: Japan delivered 17.5% more weeks than in 2020, reaching a total of 24,040 students weeks. Switzerland witnessed growth of 10.9% over 2020, reaching 17,739 weeks in 2021. On the other hand, European countries such as France and Spain showed a double-digit decline, at -26% and -21%, respectively. Overall, 43 markets grew between 2020 and 2021, while 71 experienced y-o-y decline. Additionally, the average course duration for 56 source markets was longer than the overall average of 7.9 student weeks.

Rank	Country/region	Student weeks (2020) n=291	Student weeks (2021) n=296	Student numbers (2020) n=291	Student numbers (2021) n=296	Average length of stay (2021)	Change in student weeks (%) n=276	Change in student numbers (%) n=276
		Overall data					Like-to-like comparison	
26	Israel	380	1,997	70	542	3.7	416.9%	665.2%
27	Taiwan	4,239	1,979	526	217	9.1	-59.2%	-67.7%
28	Portugal	1,445	1,974	277	390	5.1	37.2%	21.8%
29	Panama	3,336	1,776	271	180	9.9	-46.8%	-33.6%
30	Morocco	1,544	1,467	172	97	15.1	96.7%	28.8%
31	Algeria	1,558	1,394	160	139	10.0	-14.6%	-20.8%
32	Hong Kong	3,252	1,362	239	208	6.5	-60.2%	-16.6%
33	Other Africa	1,935	1,317	197	145	9.1	-30.6%	-27.1%
34	Iran	912	1,296	123	148	8.8	34.3%	3.3%
35	Poland	1,491	1,271	526	395	3.2	-15.8%	-29.2%
36	Libya	864	1,131	65	82	13.8	24.2%	15.6%
37	Albania	354	1,115	41	128	8.7	129.7%	131.7%
38	Kazakhstan	1,205	1,078	161	191	5.6	-11.1%	16.1%
39	Argentina	5,633	1,046	1,482	182	5.7	-81.4%	-88.5%
40	Czech Republic	845	1,017	238	272	3.7	16.4%	12.0%
41	Angola	1,552	944	88	106	8.9	-39.1%	21.8%
42	Other Central America	499	841	60	92	9.1	70.2%	55.9%
43	Syria	700	825	83	68	12.1	14.1%	-20.5%
44	India	655	770	65	81	9.5	15.6%	14.3%
45	Bulgaria	693	711	120	98	7.3	-0.6%	-21.0%
46	Iraq	403	666	54	71	9.4	68.1%	28.3%
47	Romania	524	648	143	127	5.1	24.0%	-14.8%
48	Peru	2,262	587	436	62	9.5	-74.2%	-86.2%
49	Yemen	485	582	32	58	10.0	21.0%	-13.4%
50	Ecuador	2,084	549	303	69	8.0	-73.7%	-78.1%

- **Overall data** – performance of source markets based on statistics collected from the entire sample (296 in 2021 and 291 in 2020);
- **Like-to-like comparison** – y-o-y benchmark based on data from centres reporting in both 2020 and 2021 (276 centres) for a more accurate assessment of source market performance trends.

PRIVATE SECTOR MEMBER CENTRES

SOURCE MARKETS

Rank	Country/region	Student weeks (2020) n=291	Student weeks (2021) n=296	Student numbers (2020) n=291	Student numbers (2021) n=296	Average length of stay (2021)	Change in student weeks (%) n=276	Change in student numbers (%) n=276
		Overall data					Like-to-like comparison	
51	Pakistan	326	538	40	53	10.2	64.4%	27.5%
52	Uzbekistan	718	520	78	100	5.2	-28.1%	26.9%
53	Venezuela	1,353	515	120	47	11.0	-64.0%	-63.4%
54	Denmark	277	499	43	141	3.5	80.1%	227.9%
55	United Arab Emirates	814	486	85	59	8.2	-38.2%	-32.2%
56	Vietnam	727	414	71	34	12.2	-43.1%	-52.1%
57	Jordan	412	393	58	53	7.4	-2.0%	-7.0%
58	Egypt	226	391	29	41	9.5	72.0%	39.3%
59	Nigeria	736	384	73	41	9.4	-74.9%	-75.9%
60	Other Middle East	560	378	58	62	6.1	-32.3%	8.8%
61	Austria	966	366	491	85	4.3	-62.0%	-82.7%
62	Nepal	150	353	22	27	13.1	154.0%	28.6%
63	Indonesia	564	340	70	35	9.7	-39.7%	-52.7%
64	Bolivia	59	318	14	13	24.5	439.0%	-23.5%
65	Greece	310	288	60	35	8.2	-3.1%	-43.1%
66	Belarus	313	279	57	49	5.7	-11.3%	-17.9%
67	Slovakia	183	274	64	75	3.7	49.7%	17.2%
68	Kyrgyzstan	100	238	12	19	12.5	138.0%	58.3%
69	Hungary	376	232	92	56	4.1	-40.3%	-43.3%
70	Cyprus	353	221	33	20	11.1	-37.4%	-45.9%
71	Ireland	273	197	69	51	3.9	-22.9%	-58.8%
72	Other Western Europe	224	185	80	101	1.8	-17.4%	26.3%
73	Lebanon	55	179	7	18	9.9	218.2%	142.9%
74	Turkmenistan	294	177	17	9	19.7	-39.8%	-47.1%
75	Palestine	267	174	24	17	10.2	-38.3%	-34.8%
76	Bahrain	185	172	22	18	9.6	10.2%	0.0%
77	Azerbaijan	110	149	16	31	4.8	35.5%	93.8%
78	Norway	189	139	32	20	7.0	-28.6%	-43.8%
79	Malaysia	208	131	27	39	3.4	-37.0%	44.4%
80	Tunisia	291	128	63	16	8.0	-56.0%	-74.6%
81	Paraguay	369	122	54	13	9.4	-65.3%	-75.0%
82	USA	151	117	23	24	4.9	-22.5%	4.3%

- **Overall data** – performance of source markets based on statistics collected from the entire sample (296 in 2021 and 291 in 2020);
- **Like-to-like comparison** – y-o-y benchmark based on data from centres reporting in both 2020 and 2021 (276 centres) for a more accurate assessment of source market performance trends.

Rank	Country/region	Student weeks (2020) n=291	Student weeks (2021) n=296	Student numbers (2020) n=291	Student numbers (2021) n=296	Average length of stay (2021)	Change in student weeks (%) n=276	Change in student numbers (%) n=276
		Overall data					Like-to-like comparison	
83	Mongolia	71	113	10	10	11.3	12.7%	-59.1%
84	Other North America	136	107	20	17	6.3	-21.3%	-15.0%
85	Luxembourg	98	103	13	18	5.7	-17.3%	-7.7%
86	Georgia	103	98	25	29	3.4	-4.9%	16.0%
87	Canada	76	95	11	18	5.3	25.0%	63.6%
	Finland	117	95	37	32	3.0	-37.6%	-45.9%
89	Cambodia	24	82	5	12	6.8	241.7%	33.3%
90	Serbia	84	81	21	6	13.5	-9.5%	-76.2%
91	Estonia	54	74	30	46	1.6	48.0%	70.4%
92	Uruguay	1,344	72	309	8	9.0	-94.5%	-97.3%
93	Liechtenstein	19	67	5	7	9.6	252.6%	40.0%
94	Croatia	114	54	50	25	2.2	-52.6%	-50.0%
95	Other Australasia	10	51	2	7	7.3	410.0%	250.0%
	Other South America	152	51	27	2	25.5	-66.4%	-92.6%
97	Lithuania	129	50	28	10	5.0	-63.4%	-66.7%
98	Macedonia	7	49	1	9	5.4	600.0%	800.0%
99	Tajikistan	53	48	5	4	12.0	-9.4%	-20.0%
100	Latvia	63	47	26	15	3.1	-21.1%	-45.8%
101	Philippines	135	44	19	16	2.8	-67.4%	-15.8%
102	Moldova	82	43	13	8	5.4	-47.6%	-38.5%
103	Slovenia	24	42	9	9	4.7	75.0%	0.0%
104	Australia	4	40	1	2	20.0	900.0%	100.0%
105	Costa Rica	168	36	39	3	12.0	-78.6%	-92.3%
	Other Eastern Europe	363	36	56	7	5.1	-89.9%	-87.0%
107	Iceland	5	25	2	7	3.6	400.0%	250.0%
108	Armenia	7	21	5	8	2.6	114.3%	0.0%
109	Bosnia and Herzegovina	8	6	3	3	2.0	-75.0%	-33.3%
110	Macao	68	4	6	1	4.0	-100.0%	-100.0%
111	Singapore	2	3	1	1	3.0	50.0%	0.0%
112	Monaco	4	0	1	0	n/a	-100.0%	-100.0%
	Montenegro	29	0	19	0	n/a	-100.0%	-100.0%
	New Zealand	20	0	4	0	n/a	-100.0%	-100.0%

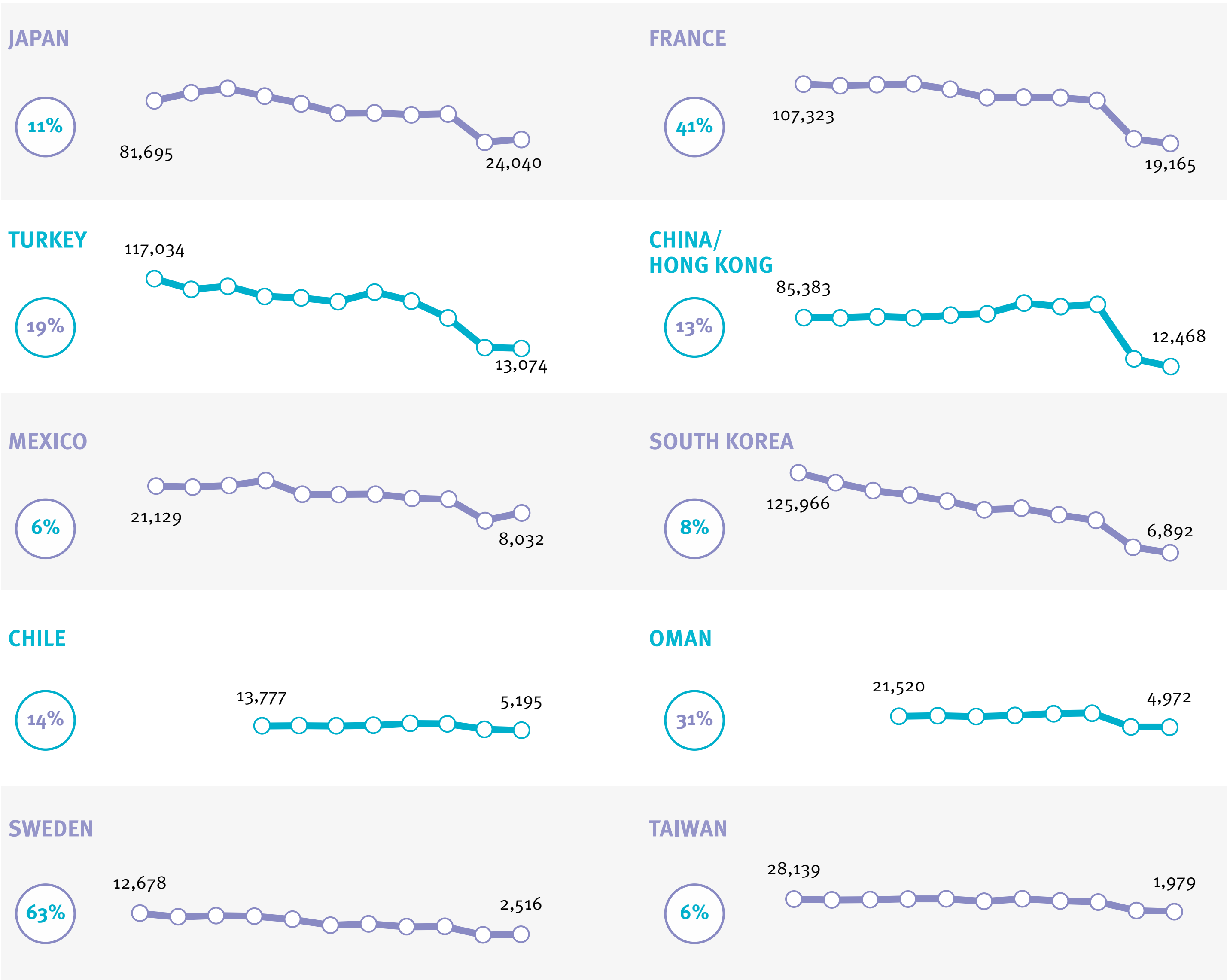
- **Overall data** – performance of source markets based on statistics collected from the entire sample (296 in 2021 and 291 in 2020);
- **Like-to-like comparison** – y-o-y benchmark based on data from centres reporting in both 2020 and 2021 (276 centres) for a more accurate assessment of source market performance trends.

Source: English UK, 2021

PRIVATE SECTOR MEMBER CENTRES

SOURCE MARKETS

Chart 19: Performance of selected source markets (student weeks, private sector, 2011-2021) and the UK's estimated market share (2020)



Note: Data for 2011-2013 for Kuwait, Chile and Oman are not available.
Figures do not reflect the fluctuation in the English UK membership over the measured period. Please see Chart 3 for more details.
Note: Global data for 2021 was unavailable at the time of compilation of this report.

Source: English UK, 2011-2021, BONARD, 2021

PART-TIME STUDENTS AT ENGLISH UK MEMBER CENTRES

MARKET OVERVIEW

While the previous chapters measured full-time students enrolled at English UK member centres, this section elaborates on the part-time student population. In the context of this report, part-time students are international English language students enrolled on courses offering fewer than 10 teacher taught hours per week.

In 2021, 11,206 students studied part-time at the 339 English UK member centres reporting data.

Part-time students were split 56% vs 44% between private and state sector member centres. However, based on unadjusted figures, both sectors experienced a similar y-o-y decrease in the number of enrolled part-time students compared to 2020: -26% in the state sector and -27% in the private sector.

Overall, in 2021, these part-time students accounted for 89,057 part-time student weeks. While the state sector accounted for 71% of these student weeks in 2020, its share dropped to 53% in 2021.

Chart 20: Part-time student numbers and part-time student weeks taught by English UK members

PART-TIME STUDENT NUMBERS

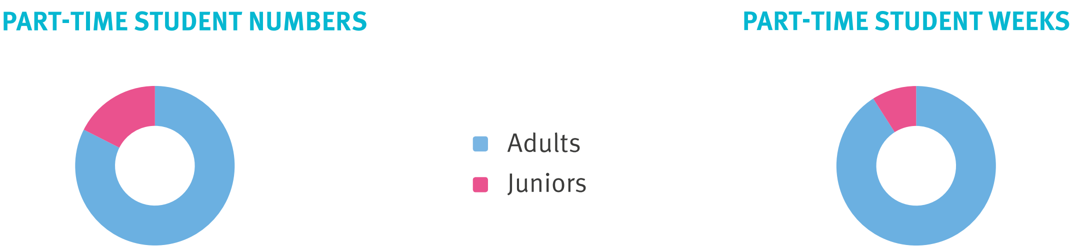
	STATE SECTOR	PRIVATE SECTOR
Number	4,881	6,325
Change	-26% over 2020	-27% over 2020

PART-TIME STUDENT WEEKS

	STATE SECTOR	PRIVATE SECTOR
Number	46,859	42,198
Change	-51% over 2020	+6% over 2020

Source: English UK, 2021; performance based on statistics collected from the entire sample, n=333 in 2020, n=339 in 2021.

Chart 21: Share of adults and juniors within the total number of part-time students and student weeks in the UK



More than four in five part-time English language students were adults in 2021. The proportion of adults was even higher at sector centres, where 99% were adults and there were only 32 juniors. At private sector members, 69% of part-time students enrolled in 2021 were adults, and 31% were juniors.

The private sector experienced an increase in part-time student weeks driven by adult students (up 38% compared to 2020), whereas student weeks for juniors decreased by 48%. In the state sector, student weeks for both groups declined sharply in 2021: by -51% for adults and -71% for juniors.

In the private sector, 83 of 298 centres hosted part-time students, whereas 18 of 41 state sector centres reported doing so. This compares with 77 of 294 and 22 of 39, respectively, in 2020.

Source: English UK, 2021; n=98

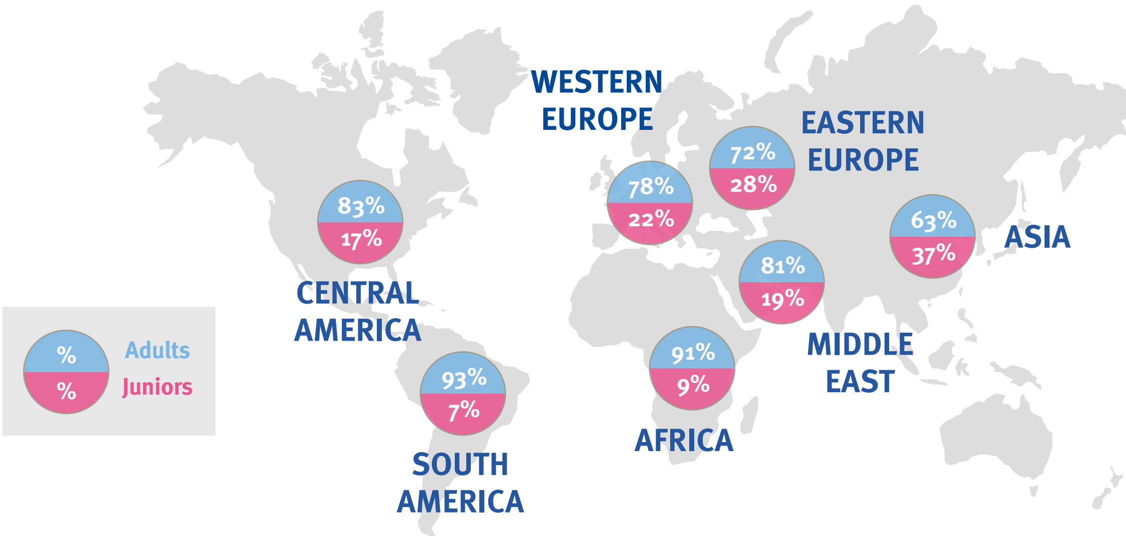
PART-TIME STUDENTS AT ENGLISH UK MEMBER CENTRES

SOURCE REGIONS

Western Europe remained the leading source region for the private sector, sending 2,396 part-time students in 2021. However, the number of part-time junior students from Western Europe dropped by 52% between 2020 and 2021. The second largest source region for the private sector was Eastern Europe, which sent 884 part-time students in 2021.

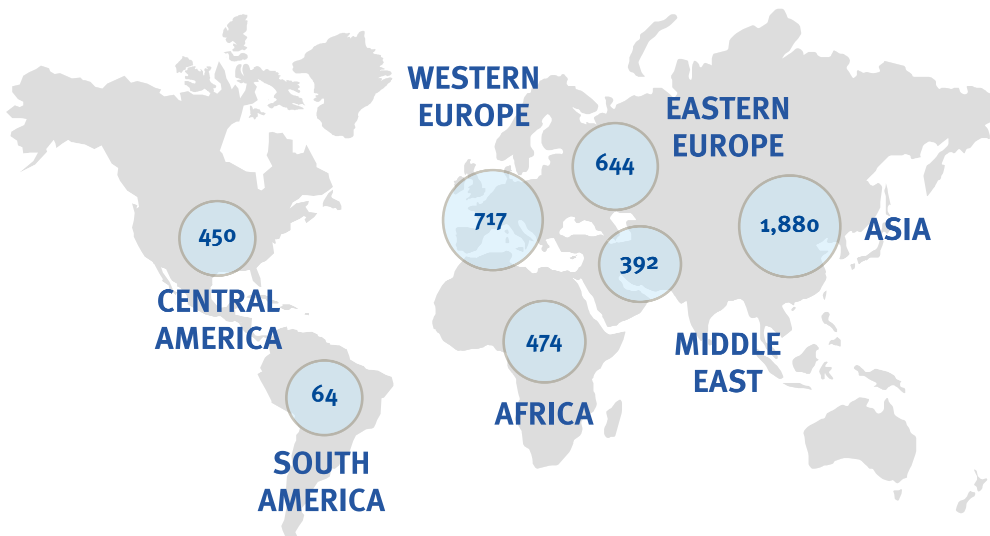
For the state sector, the leading source region was Asia, which sent 1,880 part-time students in 2021, followed by Western Europe, which accounted for 717 students.

Chart 22: Adult to junior ratio (part-time student numbers, private sector centres)



Source: English UK, 2021; n=83

Chart 23: Number of part-time students by source region (state sector centres)



Source: English UK, 2021; n=18
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

Prepared by

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