

2023

STUDENT STATISTICS REPORT

ENGLISH LANGUAGE STUDENTS IN THE UK IN 2022



BONARD

STUDENT STATISTICS REPORT 2023

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Prepared on behalf of:



English UK
47 Brunswick Court, Tanner Street, London SE1 3LH, UK | +44 20 7608 7960
www.englishuk.com | info@englishuk.com

Prepared by:

BONARD

BONARD
Salztorgasse 2, 1010 Vienna, Austria | +43 650 612 4527
www.bonard.com | research@bonard.com

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FOREWORD

These are the figures the industry has been waiting for, answering the crucial question as to how UK English language teaching (ELT) is recovering from the pandemic at a time when student mobility into the UK has been made harder for our biggest markets.

The good news – as subscribers to our QUIC quarterly statistics already know – is that the story is positive overall and that members' hard work is paying off. It is a “slow but steady recovery”. But there are pockets of both excellent and concerning news, and it's too early to be sure whether what we're seeing is a return to normal or to a new normal.

The pleasing news is the doubling of student weeks from 2021, with an “impressive” 320% rise in numbers. We have recovered 60% of our 2019 student weeks, and 51% of student numbers. Juniors are returning, up from 9% of students in 2021 to 49% last year. London is once more the top study destination, with Brighton and Manchester as the next two biggest cities and the South West of England the region experiencing the biggest growth.

Overall, we had 239,576 full and part-time students, compared with 535,049 in 2019.

But the details can be disconcerting. The recovery is entirely in the private sector, which has returned to 52% student numbers and 66% of student weeks, and even that is patchy. Around a third of centres operated at under half of pre-pandemic volumes, but just under a sixth exceeded their 2019 student weeks. Half the private sector's students were juniors, but we believe most had booked pre-pandemic.

In the state sector, student numbers dropped by around a third, with under a quarter achieving over 50% of their 2019 student numbers.

The reliable performance of the Saudi Arabian market continued, with most top-20 markets showing impressive growth and on track to recover their pre-pandemic student weeks. However, the rate of recovery of the market in China remains a concern, and further EU bounce back remains to be seen with the loss of ID card travel.

I'm proud of what our industry has achieved in difficult circumstances: not only were we rebuilding, but unlike our competitors were doing so having made it harder for our biggest markets to come here. We are lobbying and will continue to lobby for tweaks to the UK immigration system to make it easier for junior groups and more attractive for other students.

Jodie Gray
Chief Executive
English UK

We are pleased to present this year's edition of the Student Statistics Report, which gives a detailed picture of how the UK's ELT sector moved towards recovery in 2022.

It provides an updated view of how the market is recovering in the UK and outlines implications for UK ELT providers over the coming season.

For a better understanding of where the UK ELT market is headed, we have introduced a new type of market recovery analysis that benchmarks 2022 student volume levels against those in 2019. The analysis describes the level of recovery achieved by individual providers as well as that of specific source markets.

We note that the overall pace of recovery in the UK appears to be slightly lagging behind that of key competitors, mostly because its traditional markets in Europe are not recovering strongly enough.

The uneven recovery and market developments in China and Russia have clear implications for student recruitment strategy-building. In this context, it is prudent for the sector to combine a focus on source markets that are experiencing a swift recovery and those which might not be rebounding as fast, but offer long-term potential for the UK ELT sector.

To be specific, markets in the former group include Latin American countries such as Argentina, Chile, and Mexico, which have almost fully recovered compared to 2019, but also Brazil and Colombia, which represent sizeable markets with a positive mid-to-long-term outlook. Hence, this region is one of the geographies where it is strategically important for the UK ELT sector to invest in recruitment activities. Those in the latter group are European countries where students have become more prone to choose competitors to the UK as their study destination.

To further enhance the range of learning outcomes available, we have also incorporated a new regional analysis which zooms in on top-performing cities within the UK ELT sector. This allows UK ELT providers to spotlight local trends and gives providers enhanced benchmarks.

The continued coordination of stakeholders, which include the government, and their targeted marketing efforts in prospective target markets will be crucial in the coming year, and if such coordination is achieved, we firmly believe that the ELT sector will be able to speed up its recovery.

Patrik Pavlacic
Chief Intelligence Officer
BONARD

METHODOLOGY

The core data in this report was collated from English UK annual student data submissions returned between 2012 and 2022. English UK is the national membership association of accredited English language teaching (ELT) centres in the UK. Its 300+ member centres are fully accredited by the British Council to teach English and they account for over 85% of the accredited ELT sector.

A descriptive note beneath each chart states the origin 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. Where appropriate, we have therefore introduced historical comparisons based on the same research sample (only centres reporting in both 2021 and 2022, or 2019 and 2022);
- Traditionally centres have been asked to report only courses that take place face-to-face. For the last three years, to understand the impact of the pandemic, centres have been asked to report 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 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 36 and 37.

EXECUTIVE SUMMARY

General Overview

- In 2022, English UK's 329 member centres taught 225,641 full-time English language students, for a combined total of 973,716 student weeks.
- Total student weeks were more than double the 2021 figures (+111%), while student numbers showed an impressive 320% increase. This growth was driven mainly by the private sector. These figures do not reflect fluctuation in English UK membership.
- The absolute overall year-on-year growth in student weeks was driven mainly by the fastest growing source markets: Argentina (+1,329%), Brazil (+567%), Italy (+502%) and Ukraine (+413%). China and Russia, traditionally key markets for UK ELT, sent fewer student weeks (-25% and -20%, respectively).
- From data from the 308 centres reporting in both 2019 and 2022, the sector has now recovered 60% of its 2019 student week volume and 51% of its student numbers. Across the membership the recovery rate was uneven, as 13% of providers exceeded their 2019 student weeks.
- Most students were taught face-to-face in 2022 (97%), exemplifying that, as pandemic-related travel restrictions reduced, the need for emergency remote modes of teaching delivery severely diminished.
- For the first time since the start of the pandemic, juniors returned in volume, making up 49% of all students, compared to only 9% in 2021.
- While in 2021 Northern England outperformed London as a top study destination, the capital was back as the top study destination in 2022, accounting for 29% of all student weeks.
- After London, the cities with the highest share of student weeks in 2022 were Brighton (9%), Manchester (9%), Bournemouth (8%) and Oxford (6%).
- In 2022, 93 English UK member centres taught part-time English language courses to an additional 11,913 students.

State Sector Member Centres

- The 34 state sector member centres taught 10,175 full-time English language students (a 22% decrease compared to 2021) and delivered a total of 95,077 student weeks (33% decrease fewer than in 2021). These percentage changes are absolute and do not reflect fluctuations in the size of the membership.
- From like-to-like data from the 32 state member centres reporting in both 2019 and 2022, on average student weeks have recovered to 35% and student numbers to 43% of pre-pandemic levels.
- Adults made up 97% of the state sector members' student weeks, a proportion similar to that observed in 2019 (98%).
- In contrast to the private sector, the state sector still had a sizeable proportion of students (32%) studying online.
- The average course of duration for adult students in 2022 was 9.6 weeks, dropping from a high in 2020 (11.6 weeks) to this lower than pre-pandemic average (of 10.9 weeks). In contrast, the average stay for junior students more than doubled (to 5.0 weeks).
- Despite a 36% drop in student weeks, China remained the top source market for the state sector (38%). China was followed by Saudi Arabia (9%), Romania (8%), Japan (5%) and Kuwait (4%).
- English UK's state sector members additionally taught 5,875 part-time English language students (+20% increase on 2021).

Private Sector Member Centres

- In 2022, the 295 private sector member centres collectively taught 215,466 full-time students (+430% increase compared to 2021) and delivered 878,639 student weeks (+174% increase on 2021). These percentage changes are absolute and do not reflect fluctuations in the size of the English UK membership base.
- From like-to-like data from the 274 private sector centres reporting in both 2019 and 2022, the average student week volume recovered to 66% of 2019 levels and their student numbers reached 52%.
- 41 private providers exceeded their 2019 student weeks (higher than 100% recovery), a further 24 experienced between 80% to 100% recovery but 99 providers saw recovery of less than 50% of their 2019 volumes.
- Juniors made a dramatic comeback in the private sector in 2022, making up 51% of all students (compared with 11% in 2021). 190 private sector centres ran ELT programmes for the junior segment, teaching a per member centre average of 581 students (50 centres in 2021).
- The average length of stay for adults and juniors combined was 4.1 weeks, another return to pre-pandemic norms from the longer durations encountered in recent years.
- For the second consecutive year, Saudi Arabia was the biggest source market for private sector members (15% of total student weeks). Traditionally strong Western European countries experienced a rebound: Italy (12%), Spain (6%), France (5%).

GENERAL OVERVIEW

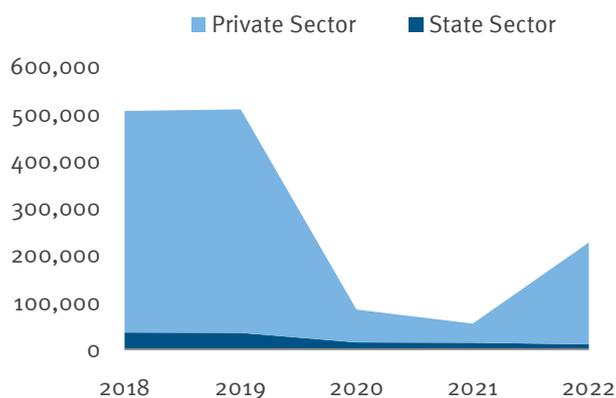
THE UK AT A GLANCE

This section refers to students studying English language full-time and is based on data provided by all 329 English UK member centres in 2022, a 100% reporting rate. In comparison, the 2021 membership comprised 341 centres, of which 339 provided data. Analysis of part-time students is available on pages 36 and 37.

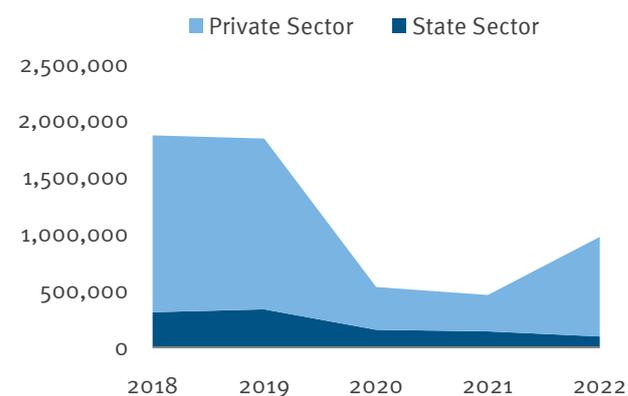
The 2022 report highlights a positive outlook for the UK English language teaching (ELT) sector, with a slow but steady recovery from the pandemic's impact over the past two years. English UK member centres taught a total of 225,641 international English language students, who spent a collective 973,716 student weeks studying in these centres in 2022.

Chart 1: Overall number of students (2018-2022) and student weeks (2018-2022) taught by English UK member centres

STUDENT NUMBERS



STUDENT WEEKS



Source: English UK, 2018–2022

Note: The number of member centres fluctuated over the measured period. Please see Chart 4 for more details.

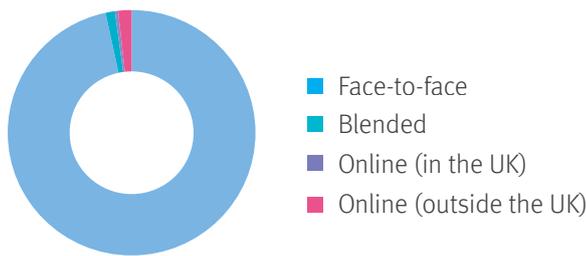
Overall, both student numbers and student weeks grew in 2022. Based on unadjusted figures, student weeks doubled in 2022 compared to 2021 (+111%), while student numbers showed an impressive 320% increase.

Despite the solid growth, volume has not yet reached pre-pandemic levels. By comparing the figures from only the 308 centres reporting in both years (2019 and 2022), the UK ELT sector has now recovered 60% of its 2019 student weeks and 51% of student numbers.

However, the growth has been driven mainly by the private sector which accounted for 95% of all student numbers in 2022 and 90% of all student weeks. This is in line with pre-pandemic levels (93% and 82% in 2019, respectively).

Student numbers and student weeks in the state sector dropped by 33% and 22%, respectively. Only 9 of the state sector members recovered more than 60% of their 2019 student week volume or 51% of student numbers.

Chart 2: Overall student numbers by mode of tuition



Source: English UK, 2022; n=329

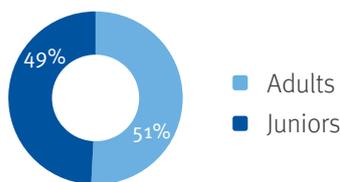
Note: The reporting on mode of tuition relates only to the accredited courses that were intended to be face-to-face but switched to alternative delivery modes due to Covid-19.

As pandemic related travel restrictions eased in most markets, the need for centres to implement ‘emergency remote teaching’ delivery methods reduced dramatically.

In 2022, face-to-face returned to being the predominant mode of delivery for accredited ELT courses (at 97% compared to 41% in 2021). Due to ongoing Covid-19 controls in some key source markets, however, the state sector segment was slower to revert, with 30% of their student volume being taught online.

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

STUDENT NUMBERS

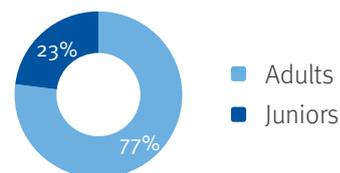


Source: English UK, 2022; n=329 member centres

For the first time since the start of the pandemic, juniors travelled in volume to study English, making up 49% of all students – a proportion close to that observed in 2019 (54%). In 2021, junior students only made up 9% of the total student numbers.

Junior student numbers soared by 2,285% and student weeks by 1,259% compared to 2021.

STUDENT WEEKS



The average length of stay of junior students has dropped, with the 2022 figure showing a decrease to 2 weeks from 3.5 weeks in 2021, returning to levels more reminiscent of pre-pandemic norms (1.8 weeks in 2019).

Similarly, adults’ length of stay also saw a decrease from 9.1 weeks in 2021 to 6.5 weeks in 2022, compared to 5.7 weeks in 2019.

Table 1: Like-to-like comparison of 2022 vs 2021

	Student numbers	Student weeks
2021 (n=316)	53,243	458,412
2022 (n=316)	222,108	954,129
Change (%)	+317.2%	+108.1%

Source: English UK, 2021-2022, n=316

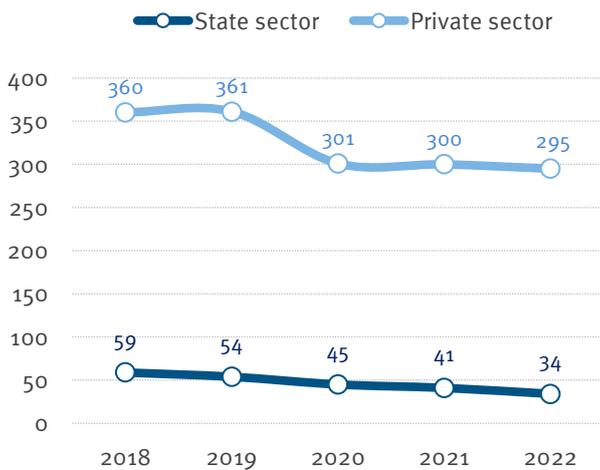
The year saw some attrition in the membership base declining by 12 (to 329 in 2022). An analysis of data from centres reporting in both 2021 and 2022 was conducted to offset the impact of any fluctuations in English UK membership and provide a more accurate insight into year-on-year performance.

Comparing figures from 316 English UK members reporting in both years, the sector saw student weeks grow by 108% and student weeks by 317%.

GENERAL OVERVIEW

PROVIDER ANALYSIS

Chart 4: Number of English UK member centres by sector

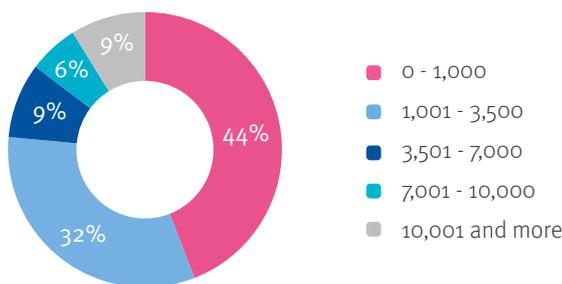


The English UK membership decreased by 12 between 2021 and 2022 and now consists of 329 member centres – 295 private and 34 state.

Compared to 2021, 86% of all providers experienced growth in student weeks, while 9% of providers delivered fewer student weeks and the remaining 5% of providers delivered the same number of student weeks as in 2021.

Source: English UK, 2018-2022

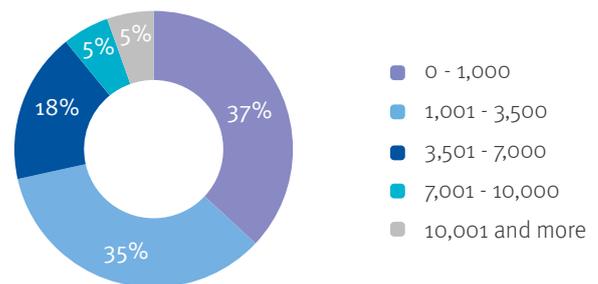
Chart 5: Percentage of member centres by reported volume of student weeks (state sector)



Source: English UK, 2022; n=34

The analysis reveals that the majority of English UK state member centres (77%) delivered between 0 and 3,500 student weeks in 2022. 80% of all their student weeks took place at the ten largest state providers.

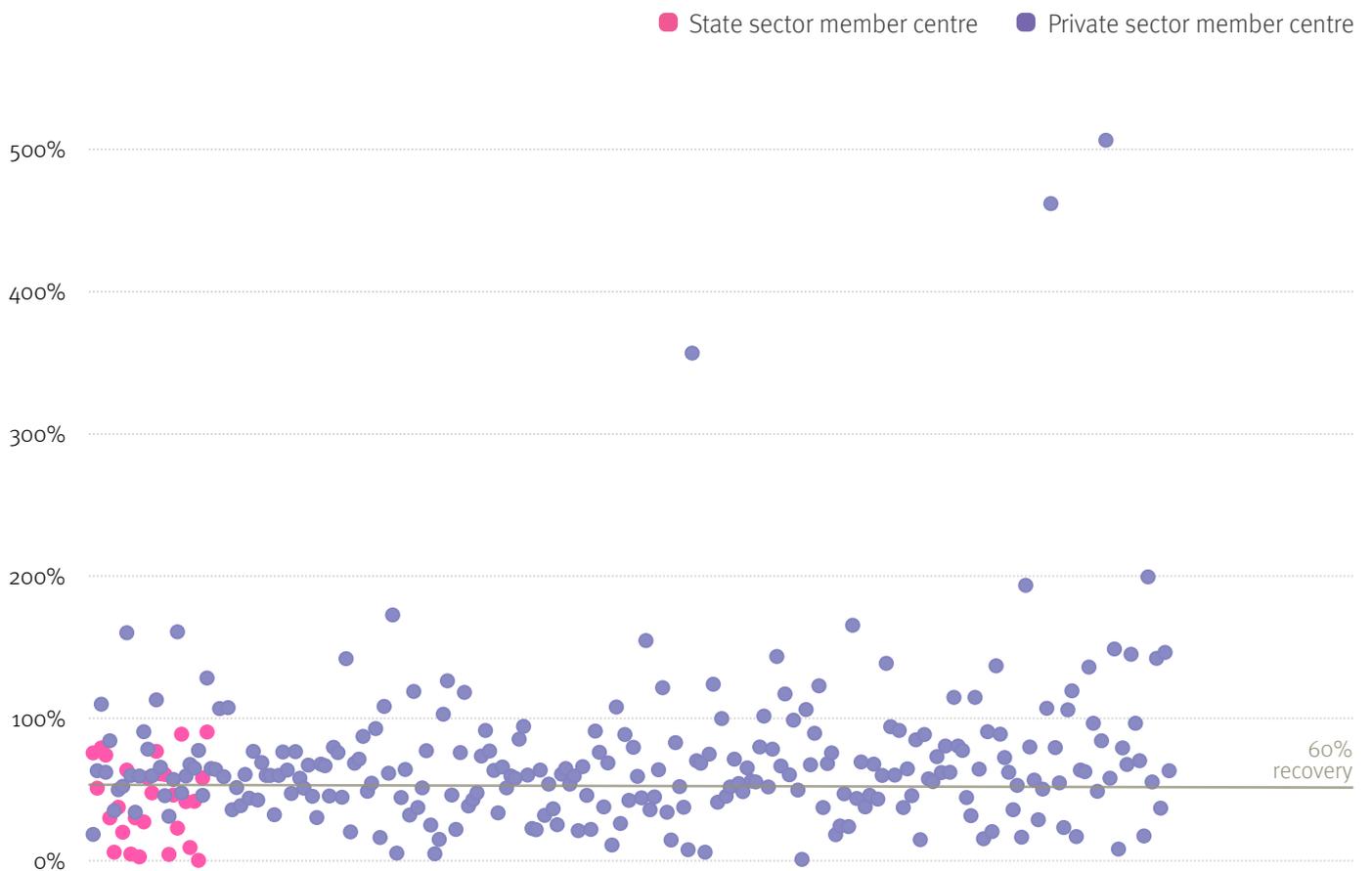
Chart 6: Percentage of member centres by reported volume of student weeks (private sector)



Source: English UK, 2022; n=295

A similar distribution can be seen at private sector centres, with 72% of them delivering fewer than 3,501 student weeks in 2022. In contrast to the state sector, the 10 largest private sector providers accounted for only 21% of this segment's total student weeks.

Chart 7: Recovery levels of English UK membership (2019 vs 2022 levels)



Source: English UK, 2019 and 2022, n=305

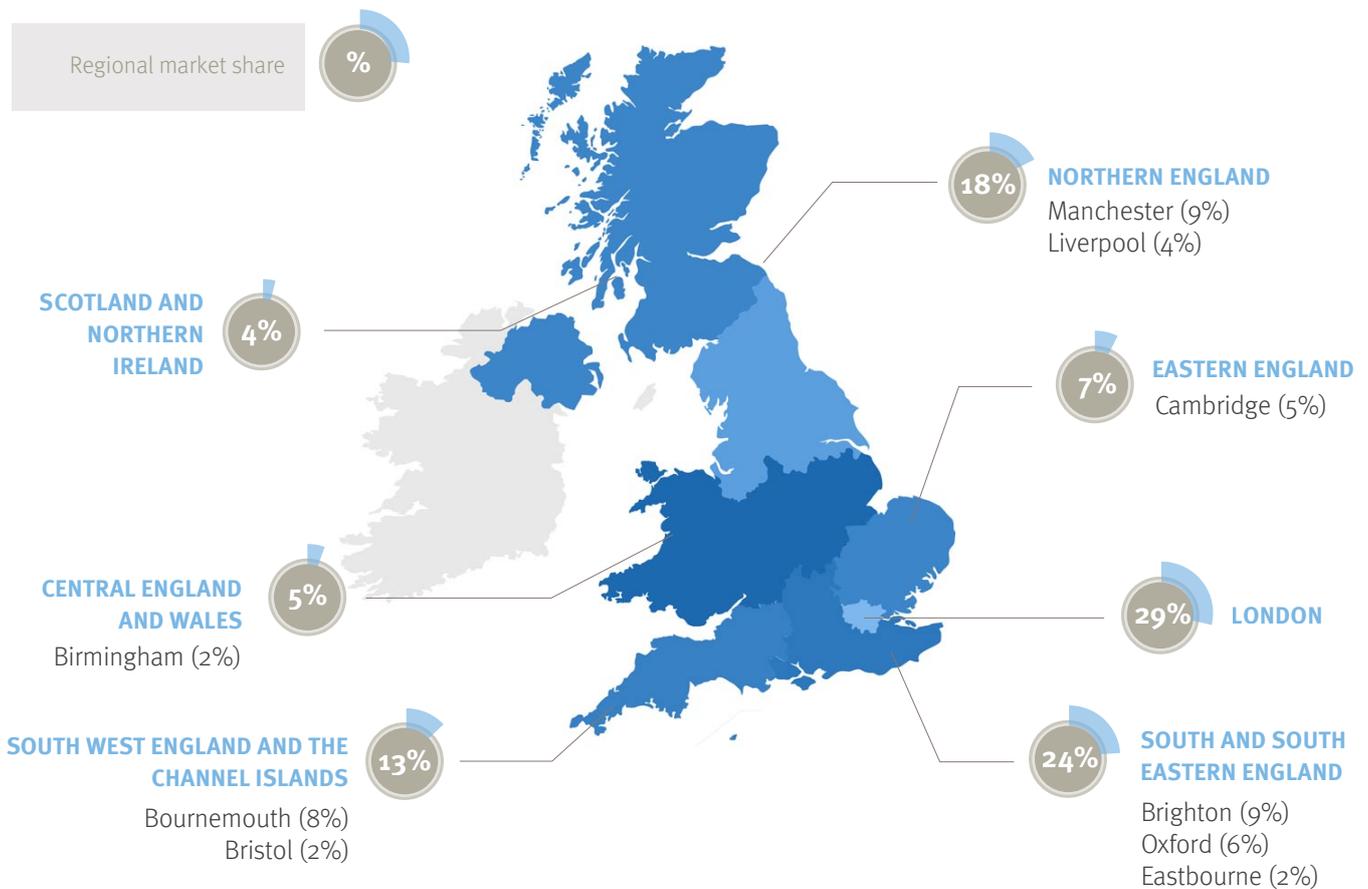
Across the English UK membership, the sector on average recovered 60% of its 2019 student week volume and 51% of student numbers. The recovery rate was uneven: 41 of all English UK member centres exceeded their 2019 student weeks (higher

than 100% recovery), a further 26 providers experienced between 80% to 100% recovery and 117 of providers had less than 50% of their 2019 student week volume.

GENERAL OVERVIEW

REGIONAL OVERVIEW

Chart 8: Regional market share (student weeks, 2022) and top ten cities with highest share of overall student weeks in 2022

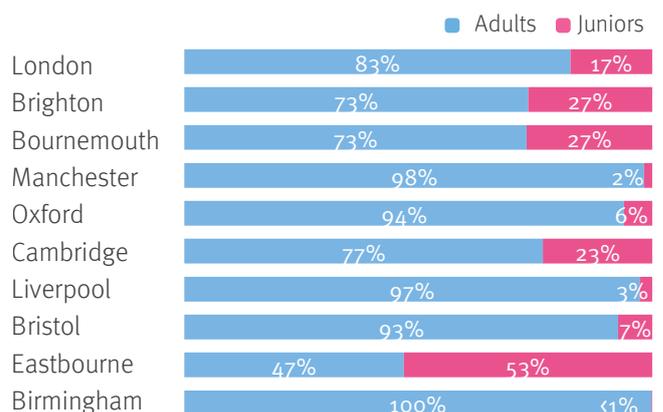


Source: English UK, 2022; n=329 member centres

London was back as the top study destination in 2022: it accounted for 29% of all student weeks (a 31% decrease from 2019), followed by South and South Eastern England with 24% and Northern England with 18%.

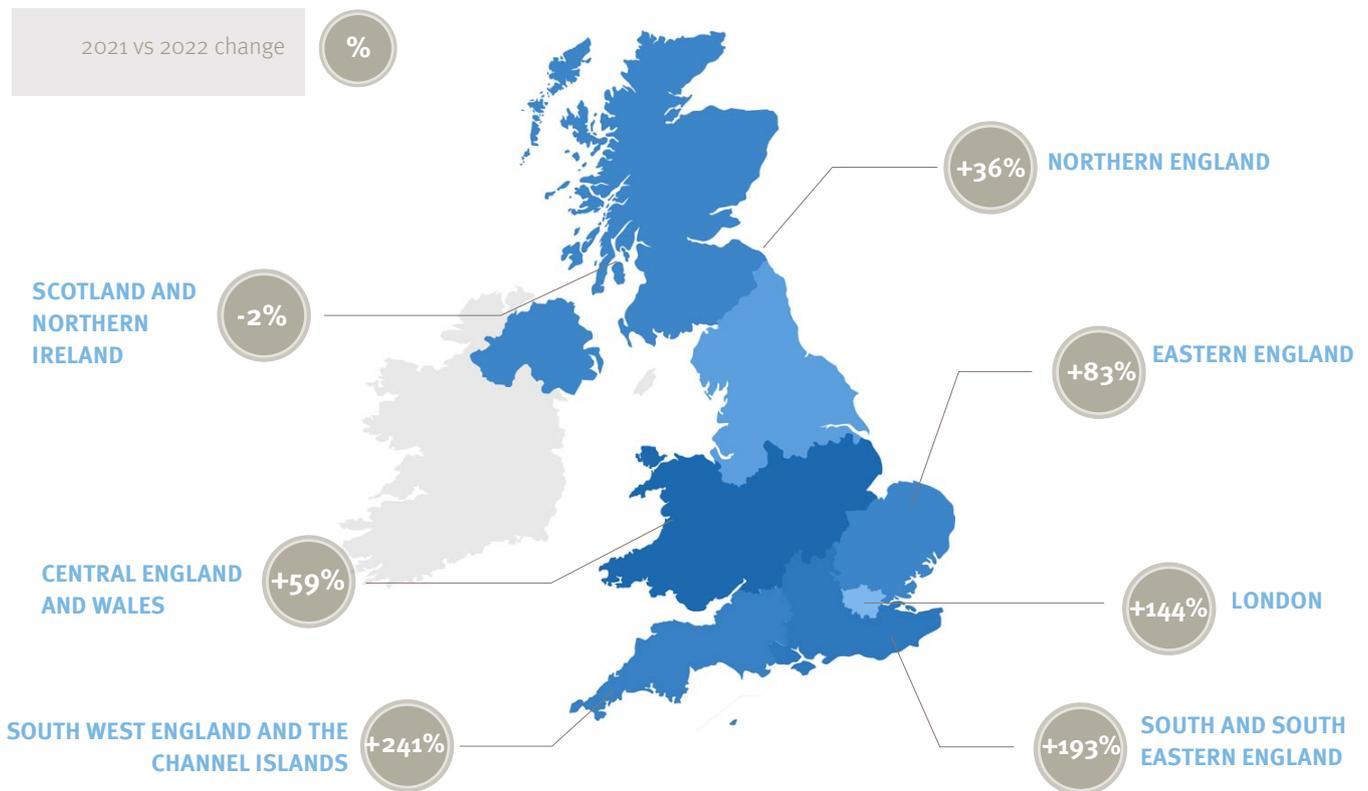
Charts 8 and 9 also provide an overview of the top ten cities for the UK ELT sector, their share of the market and age group distribution. Brighton and Manchester delivered 9% of all student weeks in 2022, ranking as the two biggest cities after London. The cities with the highest representation of junior students were located in the south of the UK.

Chart 9: Top ten cities – age group distribution (ranked by overall student week volume)



Source: English UK, 2022; n=329 member centres

Chart 10: Regional 2021 vs 2022 change in overall student weeks



Source: English UK, 2022; n=329 member centres; y-o-y comparison based on 316 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.

In 2022, almost all regions experienced an increase in student weeks from 2021. The only exceptions were Scotland and Northern Ireland, which registered a minor decrease (-2%).

In some regions, student weeks increased substantially in 2022. Percentage-wise, the largest increases were observed in the South West of England & Channel Islands (+241%), and in the South and South Eastern England region (+193%). London saw the largest increase in absolute numbers, adding 163,642 student weeks in 2022.

However, student weeks in all regions are still lower than in 2019. London recovered the largest share of its pre-pandemic student week volume (69%), followed by South West England & The Channel Islands (64%). South and South Eastern England, and Central England and Wales both recovered 63%. Northern England and Eastern England saw a 62% and 52% recovery, respectively. The lowest share of recovered 2019 student week volume was seen by Scotland and Northern Ireland (29%).

GENERAL OVERVIEW

TOP SOURCE MARKETS

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

Rank	Country	Student weeks (2021) n=336	Student weeks (2022) n=329	Share (% 2022)	Student numbers (2021) n=336	Student numbers (2022) n=329	Share (% 2022)	Average length of stay (2022)
1	Saudi Arabia	71,773	142,088	14.6%	5,931	13,360	5.9%	10.6
2	Italy	18,102	108,890	11.2%	3,381	48,986	21.7%	2.2
3	Spain	15,977	57,515	5.9%	2,207	21,165	9.4%	2.7
4	China	69,168	52,074	5.3%	8,506	5,999	2.7%	8.7
5	France	19,779	48,900	5.0%	3,316	17,060	7.6%	2.9
6	Japan	25,139	47,934	4.9%	2,505	5,796	2.6%	8.3
7	Brazil	6,839	45,643	4.7%	1,015	10,581	4.7%	4.3
8	Switzerland	17,945	45,178	4.6%	2,894	10,114	4.5%	4.5
9	Kuwait	35,299	39,948	4.1%	2,878	3,399	1.5%	11.8
10	Turkey	14,510	39,935	4.1%	1,490	6,096	2.7%	6.6
11	Germany	7,422	36,911	3.8%	1,944	18,363	8.1%	2.0
12	South Korea	8,096	24,525	2.5%	898	2,162	1.0%	11.3
13	Thailand	5,021	17,103	1.8%	475	1,906	0.8%	9.0
14	Oman	5,444	15,730	1.6%	321	1,865	0.8%	8.4
15	Chile	5,299	15,466	1.6%	544	2,301	1.0%	6.7
16	Argentina	1,082	15,461	1.6%	184	5,690	2.5%	2.7
17	Mexico	8,217	13,380	1.4%	998	2,726	1.2%	4.9
18	Colombia	3,456	13,364	1.4%	291	1,306	0.6%	10.2
19	Ukraine	2,206	11,309	1.2%	629	1,805	0.8%	6.3
20	Poland	10,325	9,916	1.0%	791	3,902	1.7%	2.5

Source: English UK, 2022; performance based on statistics collected from the entire sample for 2022 n=329, for 2021 n=336

For English UK member centres in 2022, the top-20 source markets accounted for 82% of both student weeks and student numbers. Eighteen out of these 20 markets showed solid growth compared to 2021. Saudi Arabia continued to represent the biggest market for UK ELT. Student weeks from Saudi Arabia have doubled since 2021 and, to date, this source market has recovered to 83% of its pre-pandemic student weeks.

The biggest year-on-year (y-o-y) increase was observed from Italy – student weeks grew by 502%, but they are still 53% lower than in 2019. Other traditionally strong markets in Europe such as Spain and France also grew significantly (+260% and +147% more student weeks, respectively).

Percentage-wise, the fastest-growing markets in 2022 were Argentina (+1,329% more student weeks y-o-y), and Brazil (+567%), pointing to a strong rebound in Latin American countries.

Greater recovery in 2022 was halted by China's performance, as in this source market student weeks dropped by a further 25% and student numbers by 24%. Pre-pandemic, China used to be the second-largest market for the UK ELT sector, representing 13% of student weeks. In 2022, China only accounted for 5% of the overall student week volume.

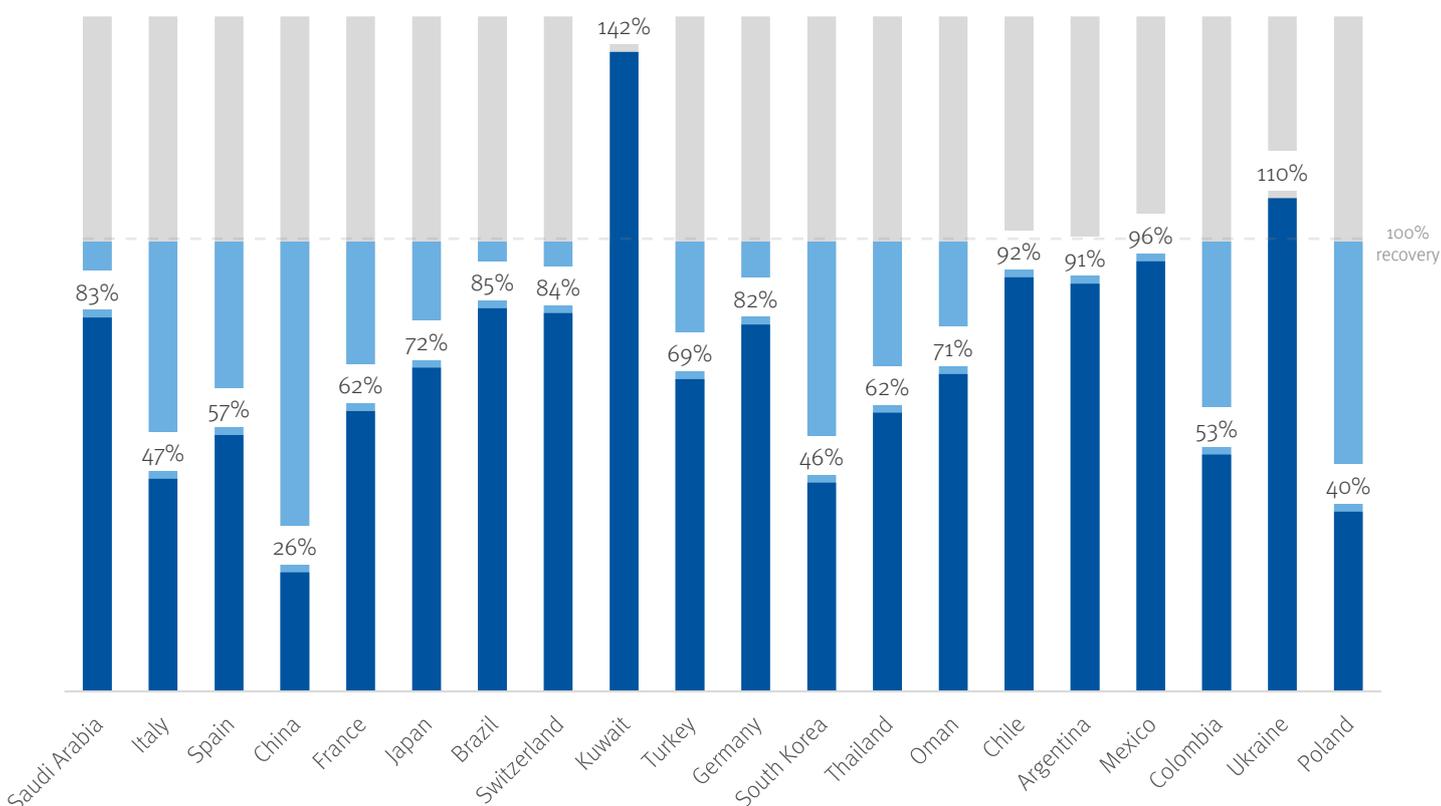
Strategic activities might be needed in order to better assess the mid-to-long-term potential in China for the UK ELT sector. Coupled with the fact that Russia is no longer a relevant source market globally, UK ELT providers should consider looking to other markets to counterbalance these losses.

Further recovery in European markets and increased recruitment activities in LATAM might be of strategic importance to the UK ELT sector given that recovery from these key markets is at stake.

GENERAL OVERVIEW

TOP SOURCE MARKETS

Chart 11: Top-20 source markets (rank by overall student weeks, 2022) and their recovery level (2019 vs 2022 volume)



Source: English UK, 2022; n=308

Note: The analysis of recovery levels is based on data from centres reporting in both 2019 and 2022 (308 centres) for a more accurate assessment.

The average recovery level of the top-20 source markets was 62%.

Two of the top-20 source markets managed to exceed their pre-pandemic student weeks – Kuwait and Ukraine (142% and 110%, respectively).

Chile, Argentina and Mexico also performed strongly in 2022 and were close to recovering all their 2019 student weeks (92%, 91% and 96%, respectively).

Despite being the fourth- biggest source market in 2022, China only recovered a fourth of its 2019 student weeks, the lowest percentage in the top-20.

When looking at each sector individually, in the state sector, Ukraine’s recovery level reached 723%. Kuwait, on the other hand, was the country with the highest recovery level in the private sector (151%).

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: State sector – top source countries by UK region (student weeks)

Rank	Central England and Wales n=7		London and Eastern England n=8		Northern England n=8	
1	China	17945	Romania	7,160	China	13,572
2	Saudi Arabia	3,513	China	4,678	Saudi Arabia	3,303
3	Hong Kong	803	Saudi Arabia	1,355	Kuwait	2,881
4	Kuwait	612	Other Asia/Far East	1,322	Japan	991
5	Taiwan	442	Poland	997	Turkey	764
6	Oman	340	India	585	Pakistan	670
7	Korea	315	Italy	489	Nigeria	542
8	Other Asia/Far East	288	South Korea	480	Korea	509
9	Nigeria	277	Turkey	477	Thailand	498
10	Thailand	254	Pakistan	454	Taiwan	412

Rank	Scotland and Northern Ireland n=5		South and South Eastern England n=6		South West England and The Channel Islands n=0	
1	Ukraine	833	Japan	2,676	n/a	n/a
2	Poland	735	Germany	1,587	n/a	n/a
3	Panama	600	Italy	1,175	n/a	n/a
4	Bulgaria	578	Brazil	623	n/a	n/a
5	Other Asia/Far East	393	Netherlands	492	n/a	n/a
6	Syria	255	Spain	443	n/a	n/a
7	Romania	187	France	434	n/a	n/a
8	Kuwait	161	Switzerland	403	n/a	n/a
9	Japan	155	Slovakia	214	n/a	n/a
10	Latvia	153	Saudi Arabia	202	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 2022.

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, 2022; n=34 member centres

GENERAL OVERVIEW

TOP SOURCE MARKETS

Table 4: Private sector – top source countries by UK region (student weeks)

Rank	Central England and Wales n=24		Eastern England n=26		London n=71		Northern England n=40	
1	Saudi Arabia	6,710	Italy	9,681	Italy	29,836	Saudi Arabia	46,091
2	Kuwait	3,116	Saudi Arabia	6,425	Brazil	24,416	Kuwait	19,538
3	Italy	2,194	France	5,021	Japan	21,001	Italy	12,585
4	Spain	1,649	Spain	3,999	Turkey	19,197	Spain	8,437
5	Japan	1,450	Switzerland	3,372	Saudi Arabia	17,243	Brazil	6,444
6	Oman	1,066	Turkey	3,273	France	12,793	Oman	5,781
7	France	868	Japan	2,474	South Korea	12,088	France	5,461
8	Qatar	764	Germany	2,359	Switzerland	11,025	Switzerland	4,482
9	Iran	593	Brazil	1,954	China	8,810	Turkey	3,733
10	Turkey	442	Argentina	1,902	Spain	8,375	Japan	2,709

Rank	Scotland and Northern Ireland n=13		South and South Eastern England n=71		South West England and The Channel Islands n=50	
1	Italy	12,742	Italy	27,169	Saudi Arabia	26,989
2	Saudi Arabia	3,865	Saudi Arabia	26,256	Italy	12,794
3	Spain	2,752	Spain	18,695	Spain	12,463
4	France	1,810	Switzerland	15,854	Germany	10,426
5	Switzerland	1,197	France	15,673	Switzerland	8,484
6	Oman	1,144	Germany	12,555	France	6,588
7	Brazil	937	Japan	11,787	Oman	4,548
8	Germany	889	Brazil	8,220	Kuwait	3,985
9	Kuwait	874	Turkey	8,178	Japan	3,849
10	Poland	491	South Korea	5,496	Turkey	3,277

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, 2022; n=295 member centres

STATE SECTOR MEMBER CENTRES

MARKET OVERVIEW

Chart 12: Student weeks taught by English UK state sector member centres



Note: The number of member centres fluctuated over the measured period. Please see Chart 4 for more details.

Source: English UK, 2018-2022

Table 6: Like-to-like comparison of 2022 vs 2021 (state sector)

	Student numbers	Student weeks
2021	12,772	138,542
2022	10,070	93,142
Change (%)	-21.2%	-32.8%

Source: English UK, 2022; n=33 state sector member centres

A total of 34 state sector member centres contributed to this report. Of these, 18 were operating in the higher education sector and 16 were further education providers.

The statistics point to a continuous decline in student numbers and student weeks in the state sector: compared to 2021, student numbers declined by 21% and student weeks by 33%. Noted decreases are likely to be the result of known structural changes, reduced funding or changing demand for product offers in state sector.

Just over half of state sector providers (56%) registered more than 1,000 students per centre.

Table 5: Student numbers by mode of tuition (state sector)

Mode of tuition	% of students
Face-to-face	64%
Blended	4%
Online (in the UK)	3%
Online (outside the UK)	29%

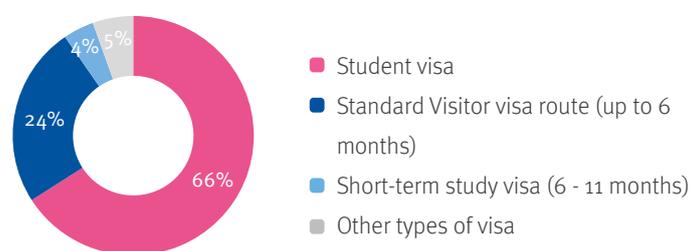
Source: English UK, 2022; n=34 state sector member centres

Note: The reporting on mode of tuition relates only to the accredited courses that were intended to be face-to-face but switched to alternative delivery modes due to Covid-19.

As generally observed in the whole ELT sector, 2022 saw a substantial decrease in the number of students needing to study online as emergency measures introduced to manage teaching during the Covid-19 pandemic were lifted. The state sector experienced a sharp increase in the number of students studying face-to-face. In 2022, 64% of students studied face-to-face, compared to 4% in 2021.

In contrast to the private sector, the state sector still had a sizeable proportion of students studying online. About 32% of students studied online, while in the private sector less than 1% did.

Chart 13: Student numbers by visa type (state sector)



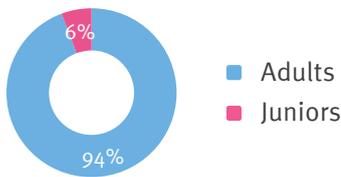
Source: English UK, 2022; n=34 state sector member centres

Most of the state sector's students were on a Student visa in 2022, replicating the trend observed in previous years. However, in 2022 the proportion of students on a Student visa (66%) was lower than in 2021 (81%), while the six-month Standard Visitor visa route grew in popularity, from 5.4% of students in 2021 to 24% in 2022. This decrease in Student visa route is in line with pre-pandemic levels (66% of students had a Student visa in 2019). A small proportion of students had a Short-term study visa (4%) or another type of visa (5%).

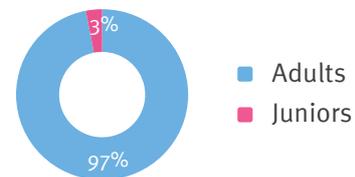
STATE SECTOR MEMBER CENTRES ADULT VS JUNIOR SEGMENT

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

STUDENT NUMBERS



STUDENT WEEKS



Source: English UK, 2022; n=34 state sector member centre

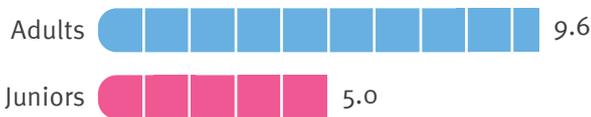
Although adult student weeks were 48,475 lower (-34%) than in 2021, adult learners remain at the heart of English UK’s state sector member centres’ offer, accounting for the majority of student weeks (97%) and student numbers (94%).

The ratio of adult versus junior student weeks resembled 2019 figures (98% to 2%) and the proportion of centres teaching

juniors also appears to be returning towards pre-pandemic levels (26% did in 2019).

At 21% in 2022, the proportion of further and higher education providers teaching juniors doubled compared to 2021 (10%).

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



Source: English UK, 2022; n=34 state sector member centres

The overall average length of stay in 2022 was 9.3 weeks: a drop from 10.8 weeks in 2021, and even shorter than the pre-pandemic average (9.8 weeks).

Adults chose longer stays: 9.6 weeks, compared to 5.0 weeks for juniors.

Whereas compared to 2019, the average length of stay decreased by 1.3 weeks for adults (from 10.9 weeks in 2019), it increased by 3.0 weeks for juniors (from 2.0 weeks).

STATE SECTOR MEMBER CENTRES

SOURCE REGIONS

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

Country/region	Student weeks (2021) n=40	Student weeks (2022) n=34	Student numbers (2021) n=40	Student numbers (2022) n=34	Average length of stay (2022)	Change in student weeks (%) n=33	Change in student numbers (%) n=33
Overall data					Like-to-like comparison		
Asia	70,295	51,688	8,447	5,882	8.8	-24.6%	-28.9%
Middle East	18,197	16,958	1,372	1,263	13.4	-5.7%	-7.1%
Eastern Europe	33,233	12,850	1,726	1,041	12.3	-62.0%	-40.3%
Western Europe	12,538	8,042	1,044	1,604	5.0	-43.2%	49.2%
LATAM	1,325	2,680	98	187	14.3	-46.2%	-33.3%
Africa	5,176	2,492	271	168	14.8	48.0%	49.0%
North America	286	338	22	27	12.5	18.2%	22.7%
Australasia	35	29	3	3	9.7	-17.1%	0.0%

Source: English UK, 2022; n=34 state sector member centres in 2022, n=40 state sector member centres in 2021 (y-o-y changes are based on a sample of 33 providers reporting in both 2021 and 2022 to provide a like-for-like comparison).

Looking at the source regions for the state sector, Asia continued to be the top region in 2022, accounting for over half of all students (58%) and student weeks (54%). In 2022, 5,882 students from Asia spent a total of 51,699 weeks studying English language with an English UK state sector member centres. However, student numbers declined by 29% and student weeks by 25% compared to 2021.

The Middle East snatched the second position from Eastern Europe, now third. While the Middle East shows a modest decrease in both student weeks (-6%) and student numbers (-7%), the number of students from Eastern Europe dropped by 62% and student weeks by 40%.

Eastern Europe experienced the highest percentage drop in student weeks, as well as the biggest year-on-year decrease in absolute numbers (-20,604 weeks). All source markets in

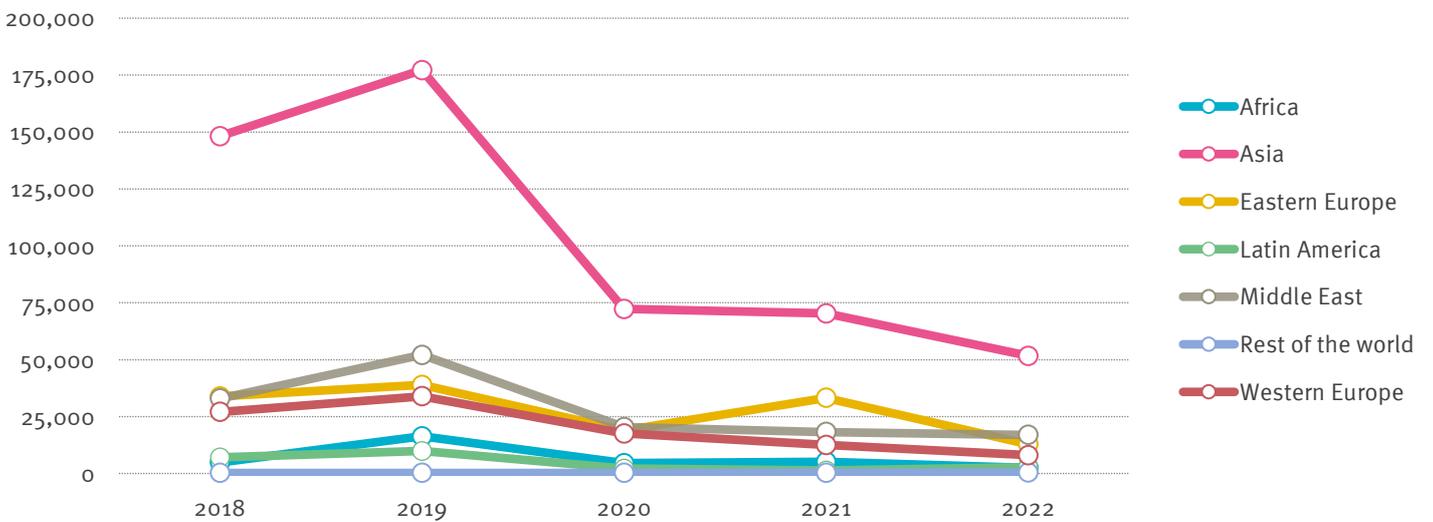
the region experienced a drop, except Ukraine, which saw a 1,085% increase in student weeks.

Western Europe also registered sizeable losses in student weeks (-43%) but also saw a strong increase in student numbers (+49%). The average length of stay in Western Europe dropped from 12.0 weeks in 2021 to 5.0 weeks in 2022.

The only two source regions showing growth across student weeks and student numbers were Africa and North America. Student weeks increased by 48% from Africa and 18% from North America, while student numbers rose by 49% and 22%, respectively.

Africa also registered the longest average length of stay – 14.8 weeks – which dropped from 19.1 weeks in 2021.

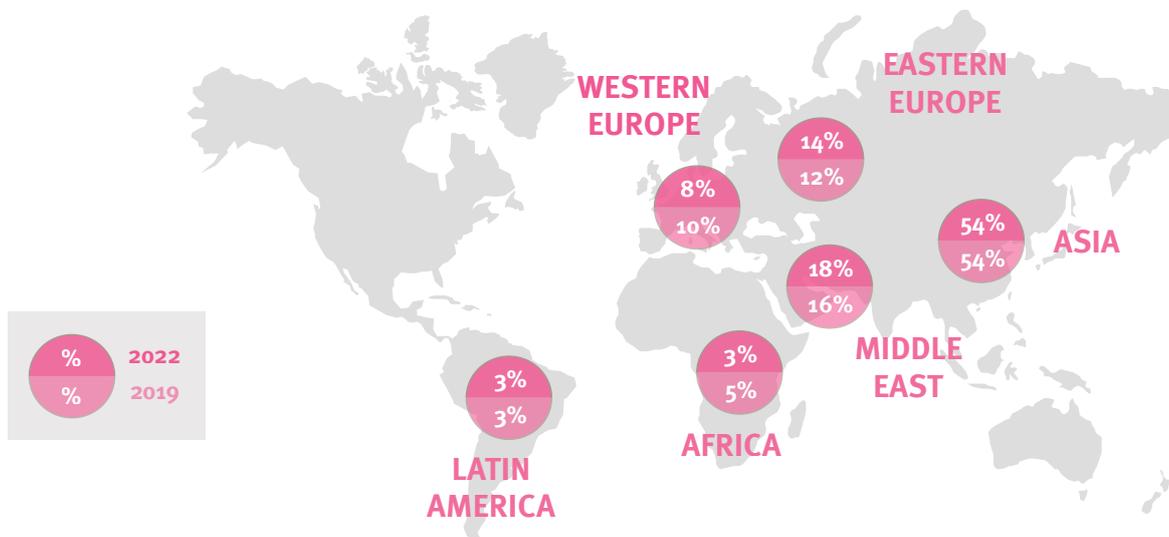
Chart 16: Student weeks by source region (2018-2022, state sector)



Source: English UK, 2018-2022

Note: The number of member centres fluctuated over the measured period. Please see Chart 4 for more details.

Chart 17: Source region market shares (UK ELT, student weeks at state sector centres, 2019 vs 2022)



Source: English UK, 2022

Note: A comparison of 2019 and 2022 figures does not reflect fluctuation in English UK membership. Please see Chart 4 for more details.

STATE SECTOR MEMBER CENTRES

SOURCE MARKETS

China was the top source country for state sector English UK member centres, despite experiencing a sharp drop in student weeks (-36%) and student numbers (-40%) compared to 2021. China sent 4,262 students to state sector member centres and accounted for 36,304 student weeks in 2022. Japan, in fourth

position, showed impressive year-on-year growth in student weeks (+302%). Of all 114 source markets, 47 grew compared to 2021, while 10 were stable and 57 decreased. Romania dropped to third place, with -58% fewer student weeks. Italy lost 45% of student weeks but saw a strong increase in student numbers (+85%).

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

Rank	Country/region	Student weeks (2021) n=40	Student weeks (2022) n=34	Student numbers (2021) n=40	Student numbers (2022) n=34	Average length of stay (2022)	Change in student weeks (%) n=33	Change in student numbers (%) n=33
Overall data						Like-to-like comparison		
1	China	58,062	36,304	7,231	4,262	8.5	-36.4%	-40.4%
2	Saudi Arabia	7,661	8,509	773	606	14.0	13.0%	-20.7%
3	Romania	17,962	7,401	953	609	12.2	-58.8%	-36.1%
4	Japan	1,099	4,259	164	499	8.5	302.9%	208.0%
5	Kuwait	3,810	3,935	214	219	18.0	3.3%	2.3%
6	Other Asia/Far East	2,434	2,295	205	234	9.8	-2.8%	15.8%
7	Italy	2,600	1,889	129	266	7.1	-45.4%	85.3%
8	Germany	1,203	1,760	305	384	4.6	26.0%	21.6%
9	Poland	9,054	1,738	396	143	12.2	-80.8%	-63.9%
10	Turkey	1,436	1,494	102	213	7.0	6.3%	110.9%
11	Ukraine	122	1,446	11	108	13.4	1,085.2%	881.8%
12	Pakistan	1,062	1,433	92	103	13.9	34.9%	12.0%
13	South Korea	1,204	1,367	170	119	11.5	128.6%	43.4%
14	Taiwan	1,179	1,211	144	134	9.0	2.7%	-6.9%
15	Thailand	856	1,205	93	127	9.5	36.4%	35.5%
16	Spain	3,820	1,145	185	263	4.4	-70.0%	42.2%
17	Hong Kong	896	988	78	93	10.6	7.9%	17.9%
18	Brazil	332	971	23	62	15.7	26.8%	26.1%
19	India	708	954	79	112	8.5	43.7%	47.4%
20	Nigeria	1,282	899	65	51	17.6	316.2%	264.3%
21	Bulgaria	2,530	864	105	54	16.0	-65.8%	-48.6%
22	Other Africa	2,736	855	137	61	14.0	-68.4%	-55.1%
23	France	614	686	66	125	5.5	11.7%	89.4%
24	United Kingdom	1,799	643	96	51	12.6	-64.3%	-46.9%
25	Panama	25	618	2	27	22.9	2,372.0%	1,250.0%

- Overall data** – performance of source markets based on statistics collected from the entire sample (34 in 2022 and 40 in 2021);
- Like-to-like comparison** – y-o-y benchmark based on data from centres reporting in both 2021 and 2022 (33 centres) for a more accurate assessment of source market performance trends.

Other countries showing sharp year-on-year decreases in student weeks were Syria, Poland, Spain, and Bulgaria. The average length of stay for the top-20 source countries was 10.8 weeks, unchanged from 2021. Most source countries in the top-20 are on track to recover their pre-pandemic student weeks, while some have already greatly exceeded them.

Ukraine, Nigeria and Hong Kong reached 723%, 213% and 193%, respectively of their 2019 student weeks, while India achieved 106%, Kuwait 97% and Germany 89%. Nine out of the top-20 source countries are, however, still below 50% of their 2019 market volume: Romania, Thailand, South Korea, China, Brazil, Turkey, Italy, Poland, and Spain (with the lowest recovery level, 11%).

Rank	Country/region	Student weeks (2021) n=40	Student weeks (2022) n=34	Student numbers (2021) n=40	Student numbers (2022) n=34	Average length of stay (2022)	Change in student weeks (%) n=33	Change in student numbers (%) n=33
Overall data						Like-to-like comparison		
	Iraq	763	618	46	45	13.7	-19.0%	-2.2%
27	Iran	530	535	31	38	14.1	2.5%	26.7%
28	Switzerland	206	517	23	76	6.8	90.8%	208.7%
29	Netherlands	697	492	131	295	1.7	-31.4%	124.4%
30	Vietnam	1,757	436	83	51	8.5	-74.8%	-37.8%
31	Oman	472	402	32	33	12.2	-14.8%	3.1%
32	Syria	2,619	388	107	26	14.9	-85.2%	-75.7%
33	Indonesia	163	372	33	47	7.9	128.2%	42.4%
34	United Arab Emirates	241	362	19	26	13.9	50.2%	36.8%
35	Slovakia	312	300	13	15	20.0	-67.9%	-61.5%
36	Russia	597	294	96	31	9.5	-50.8%	-67.7%
37	USA	182	276	17	21	13.1	51.6%	23.5%
38	Mexico	185	263	18	17	15.5	42.2%	-5.6%
39	Latvia	530	252	21	17	14.8	-56.4%	-23.8%
40	Egypt	320	239	23	17	14.1	-25.3%	-26.1%
41	Kazakhstan	548	226	45	38	5.9	-58.8%	-15.6%
42	Libya	423	207	17	15	13.8	-51.1%	-11.8%
43	Argentina	36	202	2	18	11.2	91.7%	400.0%
44	Portugal	609	189	29	11	17.2	-69.0%	-62.1%
45	Hungary	961	185	45	22	8.4	-80.7%	-51.1%
46	Malaysia	70	179	6	13	13.8	155.7%	116.7%
	Bahrain	90	179	5	12	14.9	98.9%	140.0%
48	Greece	406	177	28	15	11.8	-56.4%	-46.4%
49	Ecuador	44	170	4	8	21.3	286.4%	100.0%
50	Iceland	15	162	2	67	2.4	980.0%	3,250.0%

- i Overall data** – performance of source markets based on statistics collected from the entire sample (34 in 2022 and 40 in 2021);
- Like-to-like comparison** – y-o-y benchmark based on data from centres reporting in both 2021 and 2022 (33 centres) for a more accurate assessment of source market performance trends.

STATE SECTOR MEMBER CENTRES

SOURCE MARKETS

Rank	Country/region	Student weeks (2021) n=40	Student weeks (2022) n=34	Student numbers (2021) n=40	Student numbers (2022) n=34	Average length of stay (2022)	Change in student weeks (%) n=33	Change in student numbers (%) n=33
Overall data						Like-to-like comparison		
51	Jordan	184	160	16	18	8.9	-13.0%	12.5%
52	Algeria	84	150	7	14	10.7	78.6%	100.0%
53	Chile	104	149	12	11	13.5	16.3%	-25.0%
54	Morocco	252	117	16	7	16.7	-85.4%	-85.7%
55	Qatar	30	113	3	8	14.1	276.7%	166.7%
	Lebanon	133	113	9	9	12.6	-15.0%	0.0%
57	Cambodia	15	90	1	6	15.0	500.0%	500.0%
58	Peru	216	87	16	10	8.7	-58.2%	-28.6%
59	Norway	30	81	2	3	27.0	46.7%	0.0%
60	Albania	179	76	12	5	15.2	-57.5%	-58.3%
61	Lithuania	381	75	25	5	15.0	-80.3%	-80.0%
62	Other Central America	132	71	8	6	11.8	-46.2%	-25.0%
63	Philippines	23	70	2	12	5.8	204.3%	500.0%
	Ireland	42	70	3	5	14.0	66.7%	66.7%
65	Colombia	21	64	2	6	10.7	204.8%	200.0%
	Yemen	42	64	2	2	32.0	52.4%	0.0%
67	Czech Republic	230	63	27	9	7.0	-72.6%	-66.7%
68	Palestine	54	61	3	5	12.2	238.9%	400.0%
69	Uzbekistan	0	56	0	4	14.0	n/a	n/a
	Austria	32	56	2	4	14.0	-40.6%	50.0%
71	Sweden	110	49	7	4	12.3	-52.0%	-33.3%
72	Singapore	0	47	0	3	15.7	n/a	n/a
	Belgium	154	47	11	6	7.8	-69.5%	-45.5%
74	Azerbaijan	0	45	0	4	11.3	n/a	n/a
	Mongolia	12	45	1	4	11.3	275.0%	300.0%
76	Moldova	51	44	3	3	14.7	-13.7%	0.0%
77	Other South America	32	42	2	3	14.0	31.3%	50.0%
78	Kyrgyzstan	0	36	0	4	9.0	n/a	n/a
79	Slovenia	0	35	0	14	2.5	n/a	n/a
	Other North America	70	35	2	3	11.7	-50.0%	50.0%
81	Finland	42	34	3	23	1.5	-19.0%	666.7%
82	Other Western Europe	12	32	1	4	8.0	166.7%	300.0%

- i Overall data** – performance of source markets based on statistics collected from the entire sample (34 in 2022 and 40 in 2021);
- Like-to-like comparison** – y-o-y benchmark based on data from centres reporting in both 2021 and 2022 (33 centres) for a more accurate assessment of source market performance trends.

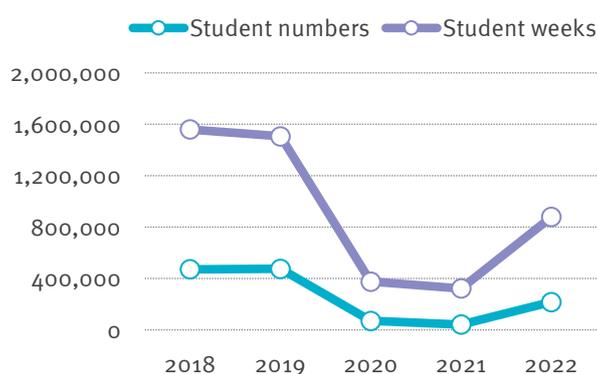
Rank	Country/region	Student weeks (2021) n=40	Student weeks (2022) n=34	Student numbers (2021) n=40	Student numbers (2022) n=34	Average length of stay (2022)	Change in student weeks (%) n=33	Change in student numbers (%) n=33
Overall data						Like-to-like comparison		
83	Estonia	82	31	3	2	15.5	-62.2%	-33.3%
84	Turkmenistan	12	29	1	3	9.7	141.7%	200.0%
85	Canada	34	27	3	3	9.0	-20.6%	0.0%
86	Venezuela	126	26	6	2	13.0	-95.2%	-83.3%
87	Cyprus	128	24	11	2	12.0	-81.3%	-81.8%
88	Australia	35	23	3	2	11.5	-34.3%	-33.3%
89	Belarus	54	22	2	2	11.0	-59.3%	0.0%
90	Nepal	140	19	13	7	2.7	-86.4%	-46.2%
91	Israel	22	15	3	2	7.5	-31.8%	-33.3%
92	Angola	61	14	5	2	7.0	-77.0%	-60.0%
93	Armenia	12	12	1	1	12.0	0.0%	0.0%
94	Tunisia	18	11	1	1	11.0	-38.9%	0.0%
	Bolivia	54	11	2	2	5.5	-79.6%	0.0%
	Denmark	115	11	19	1	11.0	-90.4%	-94.7%
97	Other Middle East	110	10	7	1	10.0	-90.9%	-85.7%
98	New Zealand	0	6	0	1	6.0	n/a	n/a
	Macao	12	6	2	1	6.0	-50.0%	-50.0%
	Uruguay	18	6	1	15	0.4	-66.7%	1,400.0%
101	Tajikistan	14	4	1	1	4.0	-71.4%	0.0%
102	Luxembourg	20	2	1	1	2.0	-90.0%	0.0%
103	Liechtenstein	0	0	0	0	n/a	n/a	n/a
	Bosnia and Herzegovina	0	0	0	0	n/a	n/a	n/a
	Croatia	0	0	0	0	n/a	n/a	n/a
	Montenegro	0	0	0	0	n/a	n/a	n/a
	Serbia	0	0	0	0	n/a	n/a	n/a
	Other Eastern Europe	0	0	0	0	n/a	n/a	n/a
	Costa Rica	0	0	0	0	n/a	n/a	n/a
	Paraguay	0	0	0	0	n/a	n/a	n/a
	Other Australasia	0	0	0	0	n/a	n/a	n/a
	Monaco	12	0	1	0	n/a	-100.0%	-100.0%
	Georgia	17	0	2	0	n/a	-100.0%	-100.0%
	Macedonia	60	0	3	0	n/a	-100.0%	-100.0%

- **Overall data** – performance of source markets based on statistics collected from the entire sample (34 in 2022 and 40 in 2021);
- **Like-to-like comparison** – y-o-y benchmark based on data from centres reporting in both 2021 and 2022 (33 centres) for a more accurate assessment of source market performance trends.

Source: English UK, 2022

PRIVATE SECTOR MEMBER CENTRES MARKET OVERVIEW

Chart 18: Student numbers and student weeks taught by English UK private sector member centres



Note: The number of member centres fluctuated over the measured period. Please see Chart 4 for more details.

Source: English UK, 2018-2022

Table 10: Like-to-like comparison of 2021 vs 2022 (private sector)

	Student numbers	Student weeks
2021	40,471	319,870
2022	212,038	860,987
Change (%)	+423.9%	+169.2%

Source: English UK, 2022; n=283 private sector member centres

The private sector registered a very strong performance in 2022, with student numbers jumping by 430% and student weeks by 174% compared to 2021. A total of 215,466 students studied with private sector member centres, spending 878,639 student weeks.

In 2022, the private sector recovered 52% of its 2019 student numbers and 66% of its 2019 student weeks.

The ten largest private sector providers accounted for a fifth of all student weeks.

Table 9: Student numbers by mode of tuition (private sector)

Mode of tuition	% of students
Face-to-face	98%
Blended	1%
Online (in the UK)	<1%
Online (outside the UK)	<1%

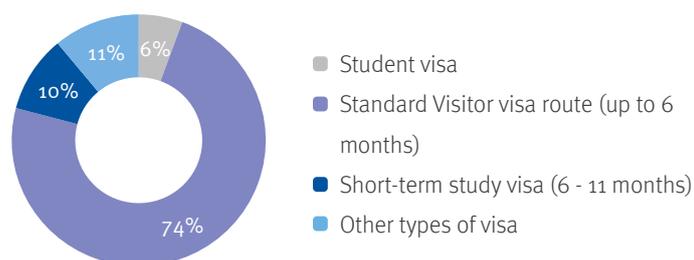
Source: English UK, 2022; n=295 private sector member centres

Note: The reporting on mode of tuition relates only to the accredited courses that were intended to be face-to-face but switched to alternative delivery modes due to Covid-19.

For reasons elaborated under tables 1 and 5, as with the state sector, the vast majority of students (98%) at private sector members reverted to the pre-pandemic norm and studied face-to-face in 2022, a 47% increase on 2021.

About 1% of students were enrolled in blended courses and less than 1% studied online in or outside of the UK.

Chart 19: Student numbers by visa type (private sector)



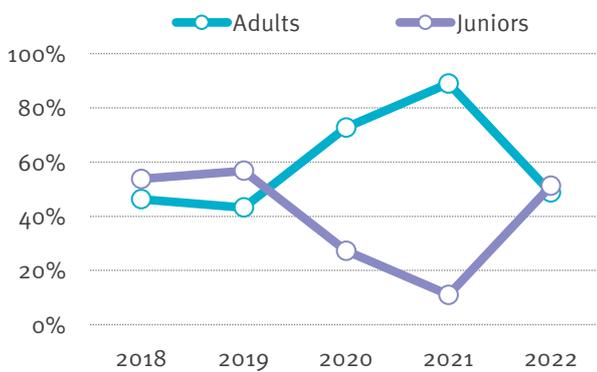
Source: English UK, 2022; n=295 private sector member centres

The majority of students studying with private sector member centres in 2022 were in the UK on the six-month Standard Visitor visa route. Due to the implementation of new simplified Student immigration routes in Autumn 2020, as is to be expected, the proportion using this route keeps rising: it was 42% in 2019, 54% in 2020, 60% in 2021 and it reached 74% in 2022. Of the remaining students, 10% had a Short-term study visa, 6% had a Student visa and 11% had other types of visas.

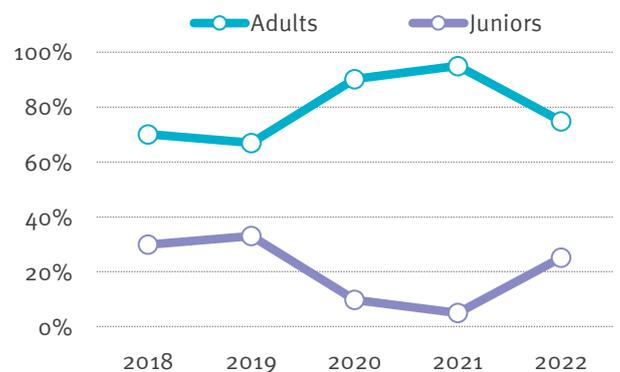
PRIVATE SECTOR MEMBER CENTRES ADULT VS JUNIOR SEGMENT

Chart 20: 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 4 for more details.

Source: English UK, 2018-2022

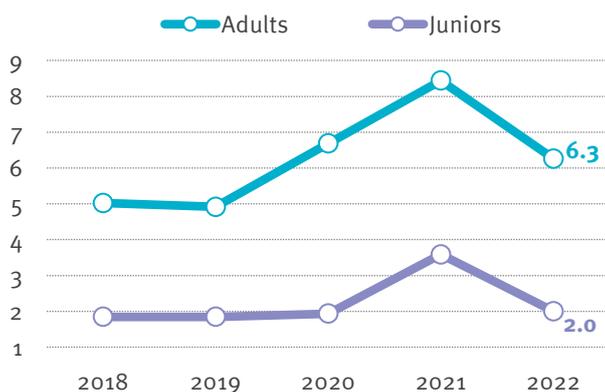
While all student weeks and numbers grew sharply in 2022, junior student numbers showed four-digit percentage growth. This means that junior students took up a much larger proportion of the student body in 2022 than they did during the pandemic.

In 2022, juniors made up 51% of student numbers and 25% of student weeks, a considerable increase compared to 2021, when they represented only 11% of student numbers and 5% of student weeks.

The number of centres enrolling junior students doubled in 2022, reaching 190 (up from 89 in 2021). Junior student numbers grew by an impressive 2,370% and student weeks by 1,277%.

Adult student numbers on the other hand grew by 191% and student weeks by 116%. The adult-to-juniors ratio in 2022 in both student numbers (43% of adults to 57% of juniors) and student weeks (67% of adult student weeks and 33%.

Chart 21: Average length of stay (weeks, private sector)



Source: English UK, 2018-2022

Students enrolled with private sector member centres opted for shorter stays in 2022, another return towards pre-pandemic norms. The overall average stay in 2022 was 4.1 weeks – compared to 7.9 in 2021 and 3.2 in 2019.

Adults on average studied for 6.3 weeks compared to 2 weeks for juniors.

For comparison, in 2019, adult students in the private sector stayed for 4.9 weeks and juniors for 1.8 weeks.

PRIVATE SECTOR MEMBER CENTRES

SOURCE REGIONS

Table 11: Student weeks, students and average length of stay (weeks) by source region (private sector, rank by student weeks)

Country/region	Student weeks (2021) n=296	Student weeks (2022) n=295	Student numbers (2021) n=296	Student numbers (2022) n=295	Average length of stay (2022)	Change in student weeks (%) n=281	Change in student numbers (%) n=281
Overall data					Like-to-like comparison		
Western Europe	84,124	327,261	15,254	128,606	2.5	285.1%	730.3%
Middle East	122,881	244,362	10,763	28,145	8.7	93.7%	155.6%
Asia	59,557	125,131	6,135	15,732	8.0	107.3%	150.3%
LATAM	29,082	117,279	3,464	24,777	4.7	289.1%	586.8%
Eastern Europe	17,551	44,863	4,027	14,791	3.0	151.1%	262.8%
Africa	7,156	18,072	667	2,988	6.0	144.4%	330.3%
North America	319	1,404	59	382	3.7	340.1%	547.5%
Australasia	91	267	9	45	5.9	193.4%	400.0%

Source: English UK, 2022; n=295 private sector member centres in 2022, n=296 private sector member centres in 2021 (y-o-y changes are based on a sample of 281 providers reporting in both 2021 and 2022 to provide a like-for-like comparison).

Student numbers and weeks from all source regions grew in 2022, with all eight regions experiencing triple-digit percentage growth in student numbers.

With the Covid-19 pandemic no longer heavily directly influencing the market and junior students travelling again, Western Europe is back as the top source region for the private sector, outperforming the Middle East.

Western Europe made up 37% of all student weeks and 60% of student numbers in 2022, with an impressive year-on-year growth fuelled by traditionally strong markets, such as Italy, Spain, France, and Germany, which cumulatively delivered 189,725 more weeks than in 2021.

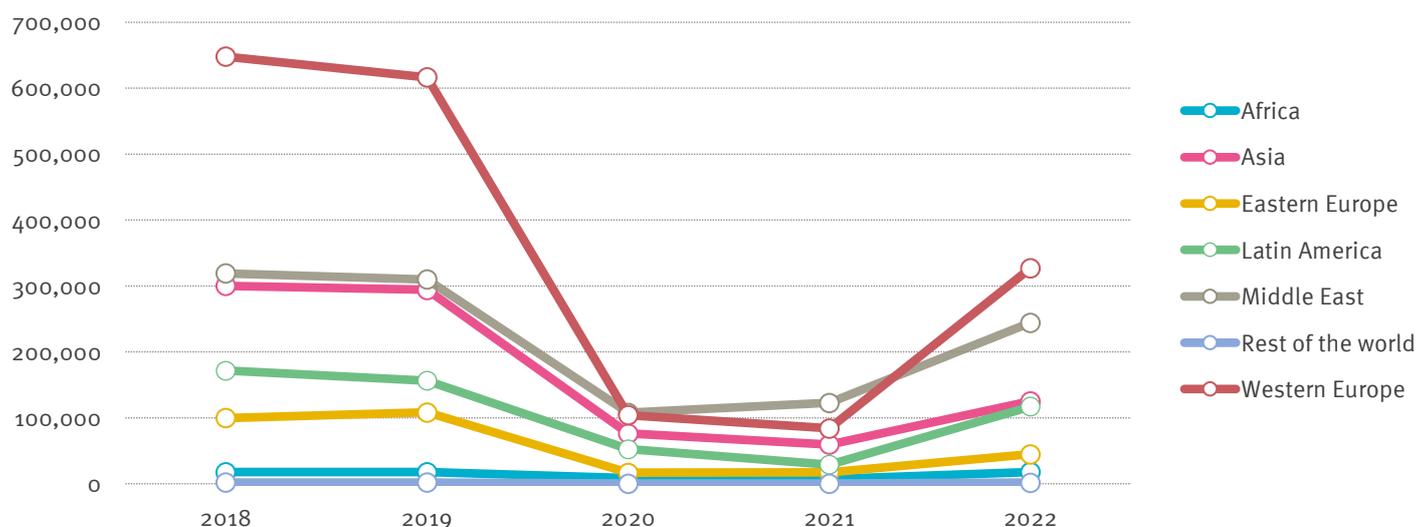
Western Europe also had the largest percentage-wise year-on-year growth in student numbers (+730%), while

the second largest came from Latin America (+587%). The growth in Latin America was mostly driven by students from Argentina, Brazil, and Colombia (showing a +3,010%, +909% and +342% year-on-year growth in student numbers, respectively).

The Middle East was the second-largest region in 2022, supplying 28% of student weeks and 13% of student numbers. Students from the Middle East spent the longest studying English language with private sector providers: 8.7 weeks on average.

At 8 weeks on average, students from Asia studied for the second longest duration. Students from Europe, on the other hand, had the shortest length of stay, at 3 weeks for Eastern Europe and 2.5 weeks for Western Europe.

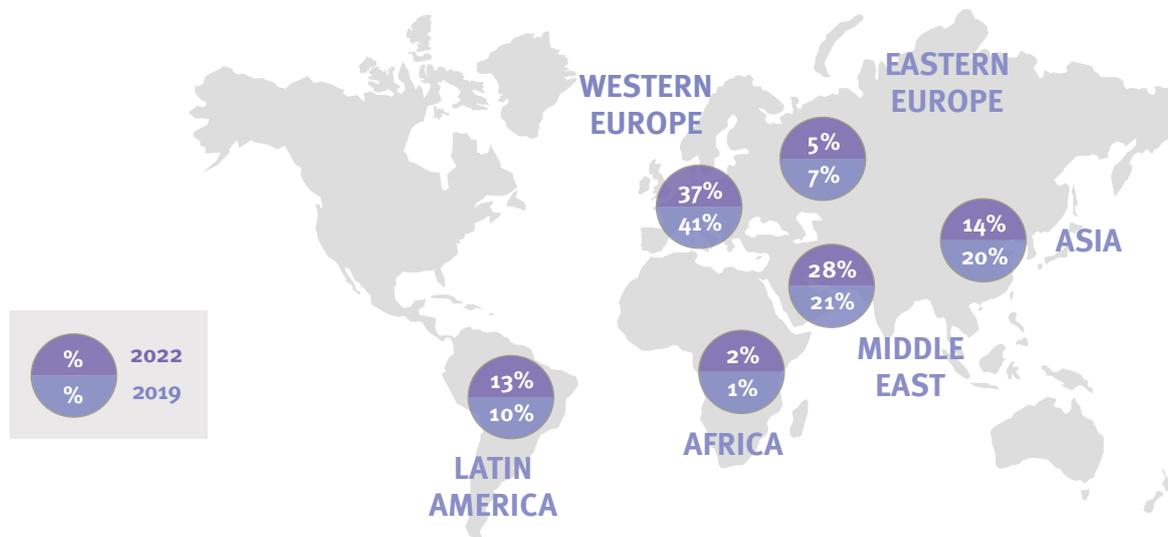
Chart 22: Student weeks by source region (2018-2022 private sector)



Source: English UK, 2018-2022

Note: The number of member centres fluctuated over the measured period. Please see Chart 4 for more details.

Chart 23: Source region market shares (UK ELT, student weeks at private sector centres, 2019 vs 2022)



Source: English UK, 2022

Note: A comparison of 2019 and 2022 figures does not reflect fluctuation in English UK membership. Please see Chart 4 for more details. Percentages do not add up to 100% due to rounding.

PRIVATE SECTOR MEMBER CENTRES

SOURCE MARKETS

The majority of the top-20 source countries showed impressive growth in 2022 compared to 2021. Saudi Arabia remained the top market for the private sector in terms of student weeks, reaching 133,579 weeks in 2022, 102% growth on 2021. Italy was the highest-ranked source country for student numbers, sending

48,720 students in 2022 – a significant increase on the previous year (+1,338%). Student numbers from Spain and France, in third and fourth position, soared by 880% and 408% respectively. Another country showing strong percentage-wise growth in student weeks was Argentina (+1,352%). Germany, ranked tenth with 35,151

Table 12: Student weeks, students and average length of stay (weeks) by source market (private sector, rank by student weeks)

Rank	Country/region	Student weeks (2021) n=296	Student weeks (2022) n=295	Student numbers (2021) n=296	Student numbers (2022) n=295	Average length of stay (2022)	Change in student weeks (%) n=281	Change in student numbers (%) n=281
				Overall data		Like-to-like comparison		
1	Saudi Arabia	64,112	133,579	5,158	12,754	10.5	102.0%	139.6%
2	Italy	15,502	107,001	3,252	48,720	2.2	587.8%	1,388.8%
3	Spain	12,157	56,370	2,022	20,902	2.7	347.7%	880.6%
4	France	19,165	48,214	3,250	16,935	2.8	148.4%	408.3%
5	Brazil	6,507	44,672	992	10,519	4.2	547.7%	908.8%
6	Switzerland	17,739	44,661	2,871	10,038	4.4	152.7%	249.5%
7	Japan	24,040	43,675	2,341	5,297	8.2	77.1%	117.1%
8	Turkey	13,074	38,441	1,388	5,883	6.5	189.0%	319.1%
9	Kuwait	31,489	36,013	2,664	3,180	11.3	11.4%	15.7%
10	Germany	6,219	35,151	1,639	17,979	2.0	464.0%	997.6%
11	South Korea	6,892	23,158	728	2,043	11.3	235.9%	180.8%
12	Thailand	4,165	15,898	382	1,779	8.9	284.2%	367.4%
13	China	11,106	15,770	1,275	1,737	9.1	41.4%	35.4%
14	Oman	4,972	15,328	289	1,832	8.4	205.2%	525.3%
15	Chile	5,195	15,317	532	2,290	6.7	187.2%	259.1%
16	Argentina	1,046	15,259	182	5,672	2.7	1,351.6%	3,009.9%
17	Colombia	3,435	13,300	289	1,300	10.2	277.8%	341.5%
18	Mexico	8,032	13,117	980	2,709	4.8	62.3%	174.0%
19	Ukraine	2,084	9,863	618	1,697	5.8	362.5%	168.4%
20	Poland	1,271	8,178	395	3,759	2.2	561.2%	841.5%
21	Russia	9,217	7,580	2,051	1,452	5.2	-19.2%	-30.0%
22	Israel	1,997	6,766	542	2,684	2.5	239.8%	397.2%
23	Czech Republic	1,017	6,548	272	3,001	2.2	551.2%	1,010.4%
24	Belgium	2,832	6,463	376	1,591	4.1	127.1%	320.5%
25	Taiwan	1,979	5,885	217	727	8.1	191.2%	230.0%

- i Overall data** – performance of source markets based on statistics collected from the entire sample (295 in 2022 and 296 in 2021);
- Like-to-like comparison** – y-o-y benchmark based on data from centres reporting in both 2021 and 2022 (281 centres) for a more accurate assessment of source market performance trends.

student weeks, sent the third-largest number of students (17,979). Overall, only nine out of the 114 source countries experienced a decline in student weeks in 2022. Most countries in the top-20 are well on track to recover their pre-pandemic student weeks: Kuwait has already exceeded its 2019 volume (151%), while Ukraine, Mexico, Chile and Argentina have reached

over 90% of their pre-pandemic levels. Seven out of the top-20 source countries achieved a recovery level of between 70% and 90%, and only three have not yet reached 50%: Italy (48%), South Korea (47%), and China (at 17%). The exceptionally low recovery rate of China may well have been influenced by its outlying travel restrictions which remained in force until early 2023.

Rank	Country/region	Student weeks (2021) n=296	Student weeks (2022) n=295	Student numbers (2021) n=296	Student numbers (2022) n=295	Average length of stay (2022)	Change in student weeks (%) n=281	Change in student numbers (%) n=281
				Overall data		Like-to-like comparison		
26	Austria	366	5,405	85	3,620	1.5	1,342.9%	4,042.4%
27	Portugal	1,974	5,281	390	2,015	2.6	164.4%	412.9%
28	Netherlands	2,010	5,145	315	1,710	3.0	156.9%	446.3%
29	Algeria	1,394	4,916	139	738	6.7	250.8%	428.8%
30	Sweden	2,516	4,548	241	1,019	4.5	78.9%	302.9%
31	Kazakhstan	1,078	3,789	191	1,213	3.1	246.8%	531.4%
32	Panama	1,776	3,678	180	220	16.7	77.7%	15.6%
33	Ecuador	549	3,040	69	438	6.9	464.4%	539.7%
34	Hong Kong	1,362	2,986	208	258	11.6	119.5%	22.8%
35	Pakistan	538	2,852	53	169	16.9	419.7%	215.1%
36	Other Africa	1,317	2,830	145	439	6.4	102.9%	179.9%
37	Angola	944	2,788	106	205	13.6	190.4%	91.5%
38	United Kingdom	2,046	2,751	401	1,012	2.7	33.0%	152.9%
39	Iran	1,296	2,712	148	267	10.2	97.6%	70.3%
40	Libya	1,131	2,646	82	199	13.3	112.4%	120.3%
41	Morocco	1,467	2,595	97	563	4.6	567.8%	1,202.5%
42	Qatar	2,086	2,389	150	233	10.3	14.3%	54.7%
43	Other Asia/Far East	4,892	2,310	284	302	7.6	-52.9%	6.0%
44	United Arab Emirates	486	2,211	59	283	7.8	353.6%	377.6%
45	Other Central America	841	2,133	92	287	7.4	152.6%	209.8%
46	Denmark	499	2,106	141	932	2.3	321.6%	560.3%
47	Romania	648	2,069	127	1,039	2.0	193.8%	668.5%
48	Peru	587	2,053	62	239	8.6	241.1%	283.6%
49	Greece	288	1,978	35	1,221	1.6	586.8%	3,388.6%
50	Hungary	232	1,652	56	670	2.5	610.3%	1092.9%

- **Overall data** – performance of source markets based on statistics collected from the entire sample (295 in 2022 and 296 in 2021);
- **Like-to-like comparison** – y-o-y benchmark based on data from centres reporting in both 2021 and 2022 (281 centres) for a more accurate assessment of source market performance trends.

PRIVATE SECTOR MEMBER CENTRES

SOURCE MARKETS

Rank	Country/region	Student weeks (2021) n=296	Student weeks (2022) n=295	Student numbers (2021) n=296	Student numbers (2022) n=295	Average length of stay (2022)	Change in student weeks (%) n=281	Change in student numbers (%) n=281
				Overall data		Like-to-like comparison		
51	Albania	1,115	1,555	128	296	5.3	33.5%	128.1%
52	Bulgaria	711	1,507	98	419	3.6	99.0%	302.0%
53	Venezuela	515	1,504	47	160	9.4	186.6%	236.2%
54	Slovakia	274	1,481	75	580	2.6	436.1%	666.7%
55	Uzbekistan	520	1,388	100	418	3.3	150.8%	246.0%
56	Jordan	393	1,361	53	186	7.3	249.9%	257.7%
57	Syria	825	1,302	68	109	11.9	51.7%	57.6%
58	Vietnam	414	1,280	34	205	6.2	209.2%	502.9%
59	Uruguay	72	1,274	8	426	3.0	1,663.9%	5,212.5%
60	Bahrain	172	1,138	18	129	8.8	515.7%	561.1%
61	Yemen	582	1,079	58	81	13.3	85.2%	37.9%
62	India	770	1,032	81	141	7.3	30.9%	71.6%
63	Iraq	666	966	71	381	2.5	29.9%	404.2%
64	Tunisia	128	958	16	666	1.4	633.6%	3,931.3%
65	Azerbaijan	149	930	31	438	2.1	491.9%	1,309.7%
66	Georgia	98	868	29	359	2.4	785.7%	1,137.9%
67	Indonesia	340	866	35	225	3.8	131.8%	431.4%
68	USA	117	729	24	254	2.9	523.1%	958.3%
69	Egypt	391	702	41	89	7.9	69.8%	107.3%
70	Norway	139	657	20	311	2.1	372.7%	1,455.0%
71	Other Middle East	378	654	62	77	8.5	54.0%	14.5%
72	Slovenia	42	650	9	322	2.0	1,447.6%	3,477.8%
73	Croatia	54	639	25	297	2.2	1,072.2%	1,080.0%
74	Nigeria	384	637	41	89	7.2	-58.4%	-18.8%
75	Paraguay	122	614	13	121	5.1	403.3%	830.8%
76	Serbia	81	607	6	255	2.4	633.3%	4,133.3%
77	Finland	95	580	32	211	2.7	510.5%	559.4%
78	Bolivia	318	547	13	180	3.0	72.0%	1,284.6%
79	Estonia	74	539	46	379	1.4	628.4%	723.9%
80	Tajikistan	48	534	4	52	10.3	1,012.5%	1,200.0%
81	Cyprus	221	451	20	52	8.7	98.6%	155.0%
82	Kyrgyzstan	238	426	19	71	6.0	73.9%	268.4%

- i** • **Overall data** – performance of source markets based on statistics collected from the entire sample (295 in 2022 and 296 in 2021);
- **Like-to-like comparison** – y-o-y benchmark based on data from centres reporting in both 2021 and 2022 (281 centres) for a more accurate assessment of source market performance trends.

Rank	Country/region	Student weeks (2021) n=296	Student weeks (2022) n=295	Student numbers (2021) n=296	Student numbers (2022) n=295	Average length of stay (2022)	Change in student weeks (%) n=281	Change in student numbers (%) n=281	
		Overall data				Like-to-like comparison			
83	Mongolia	113	413	10	42	9.8	260.2%	310.0%	
84	Canada	95	406	18	102	4.0	327.4%	466.7%	
85	Latvia	47	398	15	165	2.4	729.8%	993.3%	
86	Other South America	51	395	2	82	4.8	674.5%	4,000.0%	
87	Costa Rica	36	376	3	134	2.8	900.0%	4,333.3%	
88	Other Western Europe	185	374	101	194	1.9	102.2%	92.1%	
89	Armenia	21	345	8	169	2.0	1,419.0%	1,850.0%	
90	Lithuania	50	276	10	113	2.4	418.0%	1,000.0%	
91	Moldova	43	269	8	90	3.0	441.9%	1,012.5%	
	Other North America	107	269	17	26	10.3	151.4%	52.9%	
93	Palestine	174	246	17	32	7.7	41.4%	88.2%	
94	Other Eastern Europe	36	242	7	110	2.2	427.8%	1,457.1%	
95	Luxembourg	103	241	18	91	2.6	130.1%	400.0%	
96	Belarus	279	202	49	34	5.9	-27.6%	-30.6%	
97	Malaysia	131	190	39	26	7.3	35.9%	-35.9%	
98	Other Australasia	51	184	7	13	14.2	260.8%	85.7%	
99	Lebanon	179	177	18	34	5.2	-1.1%	88.9%	
100	Cambodia	82	164	12	11	14.9	100.0%	-8.3%	
101	Nepal	353	134	27	14	9.6	-62.0%	-48.1%	
102	Turkmenistan	177	114	9	15	7.6	-35.6%	66.7%	
103	Liechtenstein	67	108	7	31	3.5	61.2%	342.9%	
104	Philippines	44	98	16	14	7.0	118.2%	-18.8%	
105	Ireland	197	95	51	24	4.0	-51.8%	-52.9%	
106	Iceland	25	92	7	32	2.9	268.0%	357.1%	
107	Bosnia and Herzegovina	6	75	3	36	2.1	1,150.0%	1,100.0%	
108	Australia	40	70	2	30	2.3	75.0%	1,400.0%	
109	Montenegro	0	45	0	14	3.2	n/a	n/a	
110	Monaco	0	40	0	18	2.2	n/a	n/a	
111	Macedonia	49	37	9	11	3.4	-24.5%	22.2%	
112	Singapore	3	22	1	6	3.7	633.3%	500.0%	
113	New Zealand	0	13	0	2	6.5	n/a	n/a	
114	Macao	4	4	1	1	4.0	0.0%	0.0%	

- **Overall data** – performance of source markets based on statistics collected from the entire sample (295 in 2022 and 296 in 2021);
- **Like-to-like comparison** – y-o-y benchmark based on data from centres reporting in both 2021 and 2022 (281 centres) for a more accurate assessment of source market performance trends.

Source: English UK, 2022

PRIVATE SECTOR MEMBER CENTRES

SOURCE MARKETS

Chart 24: Performance of selected source markets (student weeks, private sector, 2012-2022) and the UK's estimated market share (2021)





Source: English UK, 2012-2022, BONARD, 2022

Note: Data for 2012 and 2013 for Kuwait, Chile and Oman are not available.

Note: Figures do not reflect the fluctuation in the English UK membership over the measured period. Please see Chart 4 for more details.

Note: Global data for 2022 was unavailable at the time of compilation of this report.

PART-TIME STUDENTS AT ENGLISH UK MEMBER CENTRES

MARKET OVERVIEW

This section of the report concentrates on part-time student statistics. In the context of this report, part-time students are international English language students who were enrolled in a course offering fewer than 10 taught hours per week.

Overall, 12 out of 34 state sector centres (35%) and 81 out of

295 private sector centres (27%) enrolled part-time students.

The majority of the 11,913 part-time students were adults (82%) and they were evenly split between the state sector, which attracted 51%, and the private sector, which attracted the other half (49%).

Chart 25: Part-time student numbers and part-time student weeks taught by English UK member centres



Source: English UK, 2022; performance based on statistics collected from the entire sample, n=339 in 2021, n=329 in 2022.

Chart 26: Share of adults and juniors within the total number of part-time students and student weeks in the UK (private and state sector combined)



Source: English UK, 2022; n=92

Across the whole sector, the number of adults studying English language part-time grew by 12%, while junior student numbers decreased by 22%.

The state sector saw both student numbers and student weeks rise by 20%. As there were no juniors studying on relevant courses at state sector members in 2022, this growth was driven by the adult segment.

In the private sector, although overall part-time student numbers declined by 5%, student weeks rose by 19%.

Looking more closely at the private sector adult and junior segments, the decline was driven by a large drop in junior student numbers (at -21%). Adult student numbers increased by 3% and student weeks by 22%. Junior student weeks also registered a 3% increase.

Therefore, the average length of study for both adult and junior part-time students increased substantially on the previous years' figures.

PART-TIME STUDENTS AT ENGLISH UK MEMBER CENTRES

SOURCE REGIONS

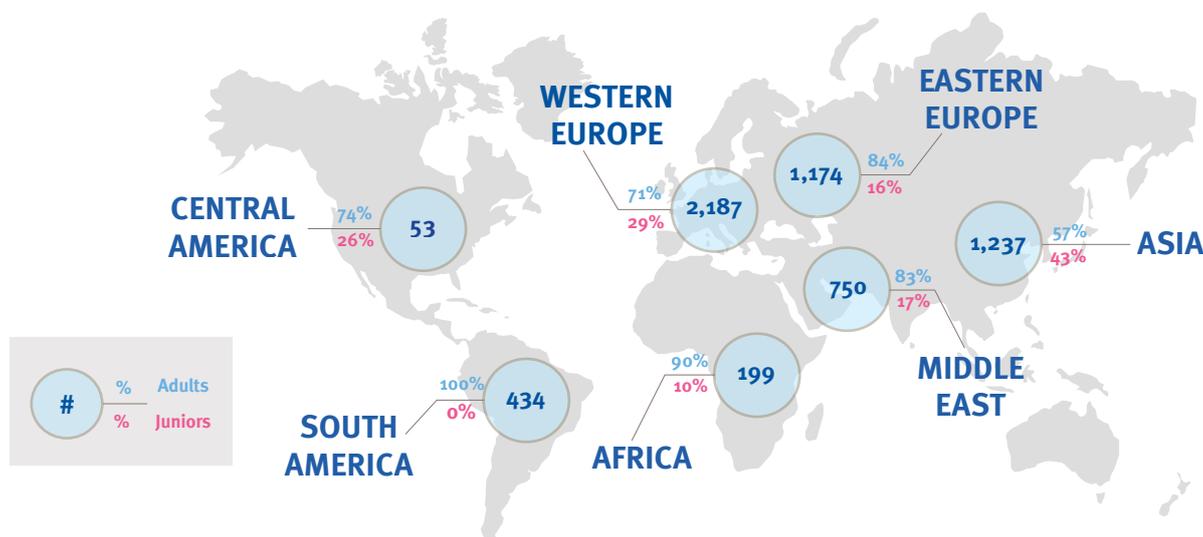
Western Europe was the top source region for the private sector, followed by Eastern Europe and Asia/Far Asia.

the part-time students from this region were juniors.

The vast majority of students from most source regions were adults. Only Asia/Far Asia showed a more even split: 43% of

in the state sector, all regions only sent adult students. The top source region was Asia/Far Asia with 3,668 students, followed by Western Europe and Africa.

Chart 27: Adult to junior ratio (part-time student numbers, private sector centres)



Source: English UK, 2022; n=80

Chart 28: Number of part-time students by source region (state sector centres)



Source: English UK, 2022; n=12

Note: As there are no part-time junior students in the state sector, this refers to adult students only.

NOTES



Prepared by

BONARD