

# 2024

## STUDENT STATISTICS REPORT

English language students in the UK in 2023



# STUDENT STATISTICS REPORT 2024

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## Prepared on behalf of:



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# FOREWORD

It's great to have better news in this year's student statistics. The story of 2023 is one of promising but steady recovery.

Maturing industries at a time of political changes are a challenging operating environment. These statistics not only help English UK members take individual marketing decisions, but demonstrate how and why targeted government support is needed.

There is plenty to celebrate. This is the first time we've topped a million student weeks since 2019, there's a 49% rise in student numbers on 2022, a more even distribution of recovery and the return of Italy as the top sending market for privately-owned centres. We've also reached 71% of pre-pandemic student weeks and a new high for young learners, who rose from 49% of all students in 2022 to 60% in 2023.

More concerning is the slow recovery rate of English UK's state sector members who reached 27% of pre-pandemic student weeks in 2023. This compares with 79% for our private sector member centres. Some of this is down to changes in the sector, but there is still potential which deserves support, and which we are working hard to address.

Global ELT is a maturing industry, with student numbers static or falling. It's a zero-sum game. Destinations compete for a stable or shrinking pool of students. One destination's gain is another's loss.

BONARD'S most recent global overview shows we are now the most popular destination for students but are less successful than competitors at translating numbers into student weeks. Our high percentage of young learners is a factor but there is work to be done.

The government can make a huge difference to our success, as recent clampdowns in competitor markets have demonstrated. Right now the UK's approach is more welcoming than that in some of our competitor destinations. Canada and Australia are currently grappling with high visa refusal rates and caps on international student numbers.

Think of the effect if our own government implemented our manifesto recommendations. International marketing, easier travelling with youth mobility and child group travel schemes, short-term work placements and increased rent a room relief for homestays would all help to give us a competitive edge.

Encouraging our students to stay for a few extra weeks would have no negative impact on immigration figures but a really positive one on local economies around the UK, our export potential and the relationships our sector forges across the globe. It may be too late for this government, but we will continue our campaign with the next.

Robust data is critical for our campaigning and lobbying activities. Thank you to all the members of English UK for contributing your statistics to this report for the benefit of our UK ELT community.

Jodie Gray  
Chief Executive  
English UK

# METHODOLOGY

The core data in this report was collated from English UK annual student data submissions returned between 2013 and 2023. 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 reason:

- 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 2022 and 2023, or 2019 and 2023).

**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 on courses offering fewer than 10 teacher-taught hours per week. Information on part-time students can be found on pages 40–43.

# EXECUTIVE SUMMARY

## GENERAL OVERVIEW

- Overall, English UK's 320 member centres taught 360,517 English language students in 2023. Of these, 343,324 were on full-time courses (either face-to-face or online) and 17,193 studied part-time.
- In 2023, 343,126 full-time English language students studied in-person for a total of 1,153,868 student weeks at these 320 member centres.
- Overall, both student numbers and student weeks showed stable growth in 2023, with +52% and +19% increases on 2022, respectively. This overall growth was fuelled by the private sector, while the state sector experienced declines in both student numbers and student weeks. Please note that these figures do not reflect fluctuations in the number of English UK member centres.
- Based on a like-for-like comparison (using data from 307 centres reporting in both 2022 and 2023), several source markets had fast paced growth: Peru (+188%), Taiwan (+124%), Colombia (+108%), and Italy (+57%).
- The UK ELT sector's recovery steadily increased year by year. According to data from 286 centres reporting in both 2019 and 2023, the sector recovered 71% of pre-pandemic student week volume (compared to 60% in 2022) and 76% of student numbers (compared to 51% in 2022). Twenty-six per cent of providers exceeded their 2019 student weeks, indicating recovery was more evenly distributed across the membership in 2023 (only 13% of providers exceeded their pre-pandemic volumes in 2022).
- In 2023, junior student numbers soared. Sixty per cent of all students were juniors, surpassing the previous year's 49% share and the 54% share recorded in 2019.
- 'South and South Eastern England' with 301,903 student weeks was the top region in 2023, surpassing London by 715 student weeks.
- After London (26%), the cities with the highest share of student weeks in 2023 were Brighton (10%), Manchester (7%), and Bournemouth (7%). Oxford and Cambridge shared the fifth position (5%).
- In 2023, 14,413 students studied part-time English language courses across 79 English UK member centres. Of these, 42% studied with state sector providers and 58% with private sector institutions. Adults accounted for 65% of these part-time students, and juniors 35%.
- In 2023, for the first time, English UK members reported their online English language course provision. There were 198 students on full-time online courses, contributing a total of 6,352 student weeks. Part-time online study was much more popular, attracting 2,780 students who studied 26,605 student weeks.

## STATE SECTOR MEMBER CENTRES

- In 2023, 29 state sector English UK member centres taught 8,195 full-time English language students, down 20% on 2022. Student weeks also declined by 28% compared to 2022, to 68,846. The state sector has seen a continuous decline in overall figures since 2019. Please note that these figures do not reflect fluctuations in the number of English UK member centres.

- Based on like-for-like data from the 27 state sector member centres reporting in both 2019 and 2023, student weeks recovered to 27%, and student numbers to 38%, of the pre-pandemic volume. This is a slight decrease from the 35% and 43% recovery rates seen in 2022, respectively.
- Adults were 90% of students at state sector centres, while juniors comprised 10%, the highest share to date.
- The average length of stay in 2023 was 8.4 weeks, the shortest since 2017 (9.3 weeks in 2022 and 9.8 weeks in 2019). Adults stayed 8.9 weeks on average (2 weeks fewer than in 2019) and juniors stayed 4.1 weeks (2 weeks fewer than in 2019).
- China continued to be the top source market for the state sector in 2023 (with a 29% share but a 40% decline in student weeks compared to 2022). China was followed by Saudi Arabia (11%), Japan (8%), Romania (7%), and Kuwait (4%).
- English UK's state sector members additionally taught 6,013 part-time students (+2% on 2022).
- In 2023, state sector member centres also delivered 5,144 full-time and 1,983 part-time online student weeks.

## PRIVATE SECTOR MEMBER CENTRES

- In 2023, the 291 private sector member centres collectively taught 334,931 full-time English language students (up 55% compared to 2022) and delivered 1,085,022 student weeks (+24%). Please note that these figures do not reflect fluctuations in the number of English UK member centres.
- According to comparable data from the 274 private sector centres reporting in both 2019 and 2023, the recovery level in the private sector reached 79% for student weeks and 78% for student numbers (compared to 66% and 52% recovery in 2022, respectively).
- Seventy-two private sector providers exceeded their 2019 student weeks (100% or higher recovery), while an additional 38 had a recovery rate of between 80% and 100%. Sixty providers saw a recovery of less than 50% of their 2019 volumes, marking a decrease from 99 in 2022.
- Junior students dominated the private sector in 2023, accounting for 61%, up from 51% in 2022. A total of 207 private sector centres taught junior students, compared to 190 centres in 2022.
- The average length of stay for private sector member centres in 2023 returned to pre-pandemic levels, matching the 3.2 weeks seen in 2019 (down from 7.9 weeks in 2021 and 4.1 weeks in 2022).
- In 2023, Italy outperformed Saudi Arabia as the leading source market for private sector members, delivering 16% of all student weeks and registering +58% rise in student weeks and +79% in student numbers. Saudi Arabia ranked second (+2%) followed by Spain (+27%).
- Private sector members centres taught 8,400 part-time students in 2023 (+39% over 2022). Additionally, they delivered 1,208 full-time and 24,622 part-time online student weeks.

## GENERAL OVERVIEW

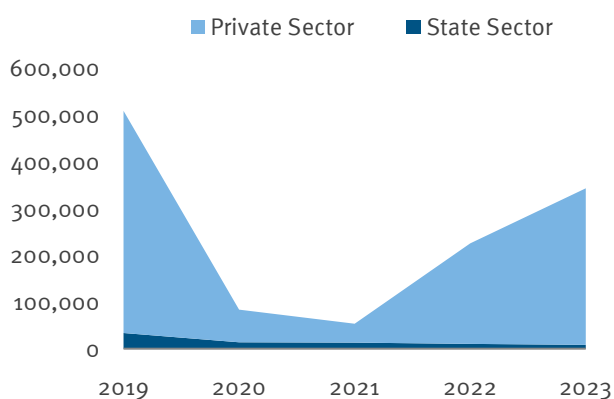
# THE UK AT A GLANCE

This section of the report analyses data on full-time English language students in the UK in 2023. Please see pages 40–43 for an analysis of part-time student figures and pages 44–45 for online figures. The English UK membership in 2023 comprised 323 centres, 320 provided data for this report.

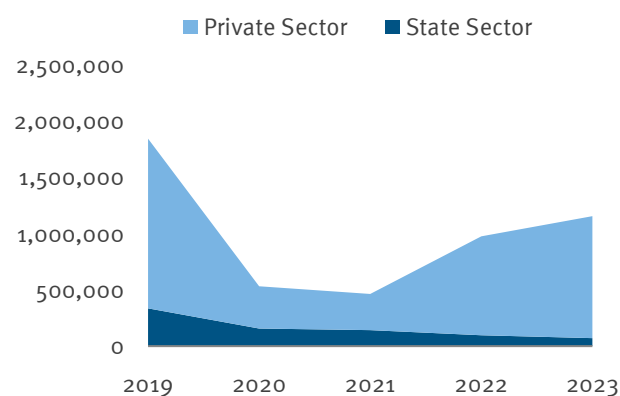
These 320 English UK member centres taught 343,126 English language students, who collectively spent 1,153,868 student weeks at these centres through 2023. The year witnessed steady growth, which indicates a promising outlook for the future.

**Chart 1:** Overall number of students (2019–2023) and student weeks (2019–2023) taught by English UK member centres

### STUDENT NUMBERS



### STUDENT WEEKS



**Source:** English UK, 2019–2023

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

Overall student numbers rose by 52%, fuelled by a significant influx of juniors, while adult student numbers remained relatively stable. As juniors tend to study abroad for shorter periods, overall student weeks rose only by 19%.

Despite the steady increase since 2020, student weeks and student numbers in 2023 did not reach pre-pandemic levels. According to a like-for-like comparison (based on 286 centres reporting in both 2019 and 2023), the UK ELT sector recovered 71% of its 2019 student weeks and 76% of student numbers.

As in the previous year, growth between 2022 and 2023 was predominantly driven by private sector centres. The private sector accounted for 98% of students and 94% of student weeks in 2023.

In the state sector, with the ongoing decline in the number of member centres (see Chart 3), we saw further decreases in student numbers and student weeks (-19% and -28%, respectively). Consequently, the state sector in 2023 accounted for only 6% of all student weeks, a drop from 22% in 2019.

**Table 1:** Like-for-like comparison of 2022 vs 2023

	Student numbers	Student weeks
2022 (n=307)	221,981	955,199
2023 (n=307)	329,775	1,120,721
Change (%)	+49%	+17%

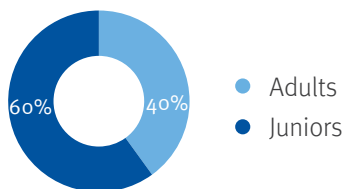
**Source:** English UK, 2022-2023, n=307

To ensure a more accurate understanding of year-on-year performance, data from centres reporting in both 2022 and 2023 was analysed. There were six fewer member centres in English UK in 2023 and this approach eliminates the effects of any membership fluctuations.

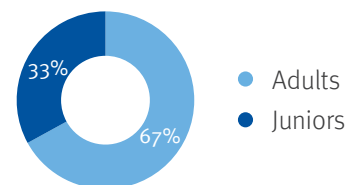
Based on the analysis of data from 307 English UK members reporting in both years, the sector experienced a 17% increase in student weeks. Student numbers registered a 49% increase compared to the volume recorded in 2022.

**Chart 2:** Share of adults and juniors out of the total number of students and student weeks taught by all English UK member centres

**STUDENT NUMBERS**



**STUDENT WEEKS**



**Source:** English UK, 2023; n=320 member centres

Continuing the positive trend in junior travel from the previous year, 2023 also saw a significant influx of junior students to the UK. Juniors made up 60% of the student population in 2023, a proportion that even surpassed their pre-pandemic share of 54% (as well as the 49% of 2022).

The annual growth between 2022 and 2023 in junior student numbers and student weeks was +85% and +70%, respectively.

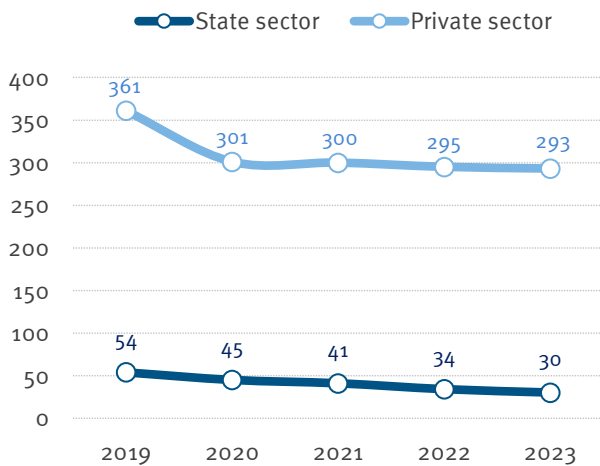
Juniors' average length of stay in 2023 dropped to 1.8 weeks, as in 2019. Consequently, adult students accounted for over two thirds of the overall student weeks volume in 2023, while juniors contributed 33%.

The average length of stay for adults also decreased, from 6.5 weeks in 2022 to 5.6 weeks in 2023. This is in line with pre-pandemic figures (5.7 weeks in 2019).

## GENERAL OVERVIEW

# PROVIDER ANALYSIS

**Chart 3:** Number of English UK member centres by sector



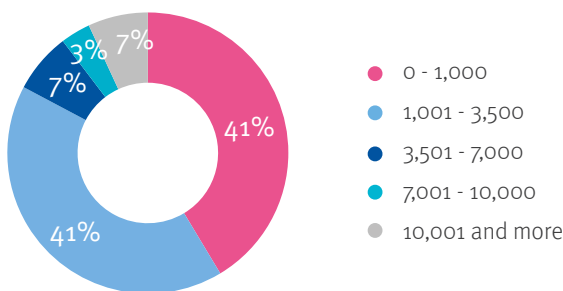
The English UK membership decreased slightly, from 329 in 2022 to 323 in 2023. Of these, 293 were private and 30 were state-run.

In 2023, 70% of providers saw an increase in student weeks (+240,717 in total), while 28% of providers saw a decline and the remaining 2% maintained the same level as in 2022.

For comparison, in 2022, 86% of centres saw an increase in student weeks (+559,926 in total). However, in 2022, there was more room for growth as the sector was still in early recovery.

**Source:** English UK, 2019-2023

**Chart 4:** Percentage of member centres by reported volume of student weeks (state sector)



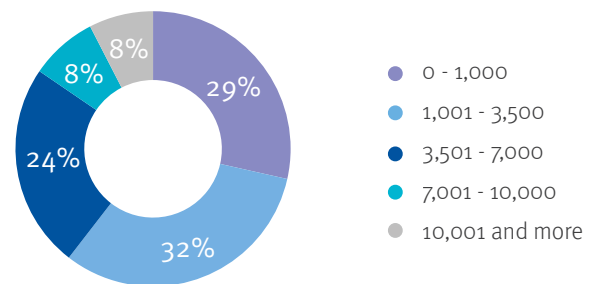
**Source:** English UK, 2023; n=29

**Note:** Percentages may not add up to 100% due to rounding.

The analysis revealed that 82% of English UK member centres in the state sector taught between 0 and 3,500 student weeks in 2023, as in 2022.

Among state sector providers, there was an uneven distribution of student weeks. The top 10 providers accounted for 79% of all state student weeks.

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

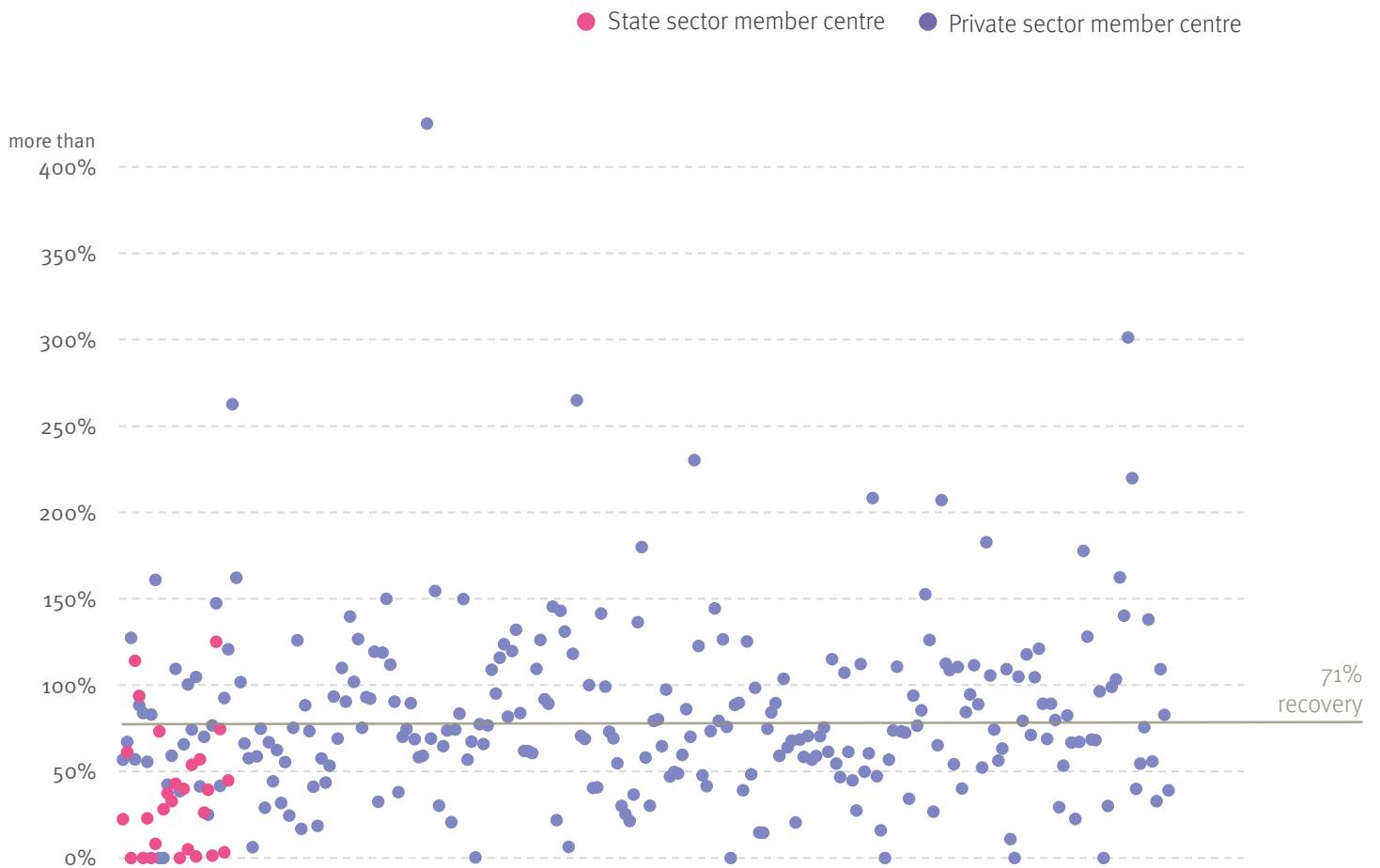


**Source:** English UK, 2023; n=291

**Note:** Percentages may not add up to 100% due to rounding.

In contrast, student weeks in the private sector were much more evenly distributed. Thirty-two per cent of the private member centres delivered between 1,001 and 3,500 student weeks, closely followed by 29% teaching 0 to 1,000 weeks, while 24% of private sector members taught 3,501 to 7,000 student weeks. The top 10 private providers delivered 19% of all private student weeks.

**Chart 6:** Recovery levels of English UK membership (2019 vs 2023 levels)



**Source:** English UK, 2019 and 2023, n=286

On average, the English UK membership saw a recovery of 71% in student week volume and 76% in student numbers compared to 2019. This recovery rate was higher than in 2022 (60% of student weeks and 51% of student numbers), indicating that the UK ELT sector is on a steady growth trajectory.

The recovery rate varied among members: 74 English UK

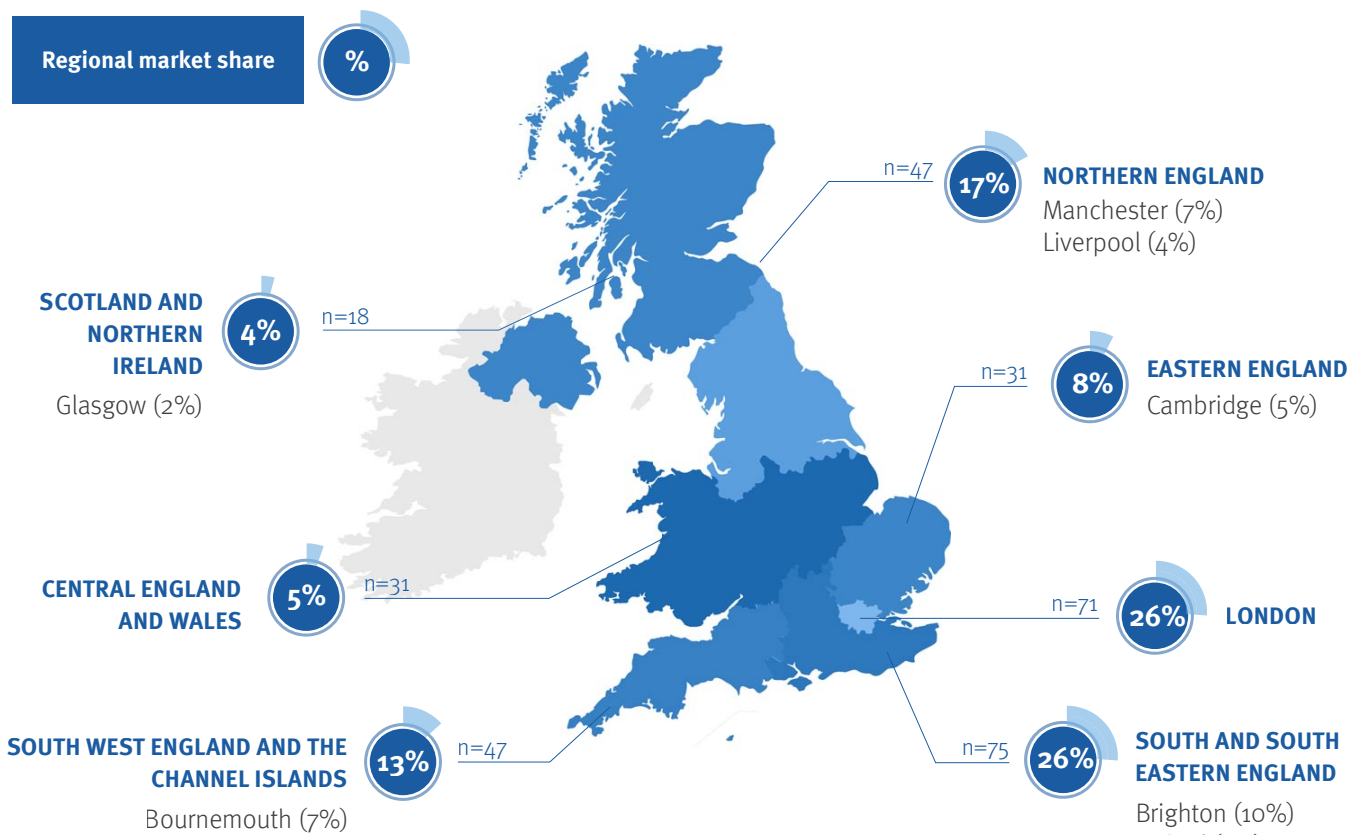
member centres exceeded their 2019 student weeks (vs. 41 in 2022), while a further 38 providers saw a recovery rate of between 80% and 100% (vs. 26 providers in 2022).

In 2023, only 78 providers delivered less than 50% of their 2019 student week volume, a decrease from 117 in 2022. This confirms a positive trend towards faster recovery across the sector.

GENERAL OVERVIEW

# REGIONAL OVERVIEW

**Chart 7:** Regional market share (student weeks, 2023) and top ten cities with highest share of overall student weeks in 2023



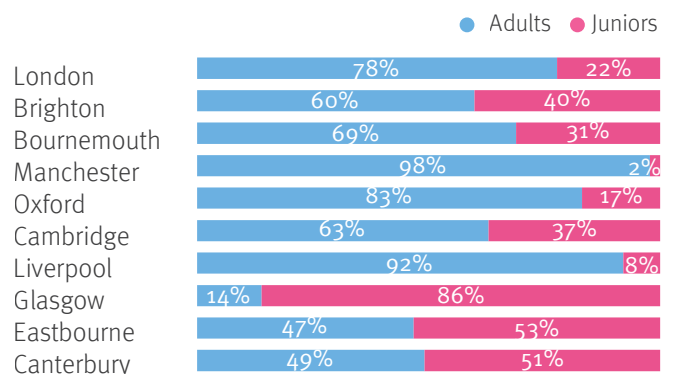
**Source:** English UK, 2023; n=320 member centres  
**Note:** Percentages may not add up to 100% due to rounding

In absolute numbers, ‘South and South Eastern England’ emerged as the top region in 2023, surpassing London by 715 student weeks.

The region was home to four of the 10 largest cities for the UK ELT sector in 2023, and it benefitted from the strong influx of junior students. Brighton, Eastbourne, and Canterbury all registered a 40% or higher proportion of junior students.

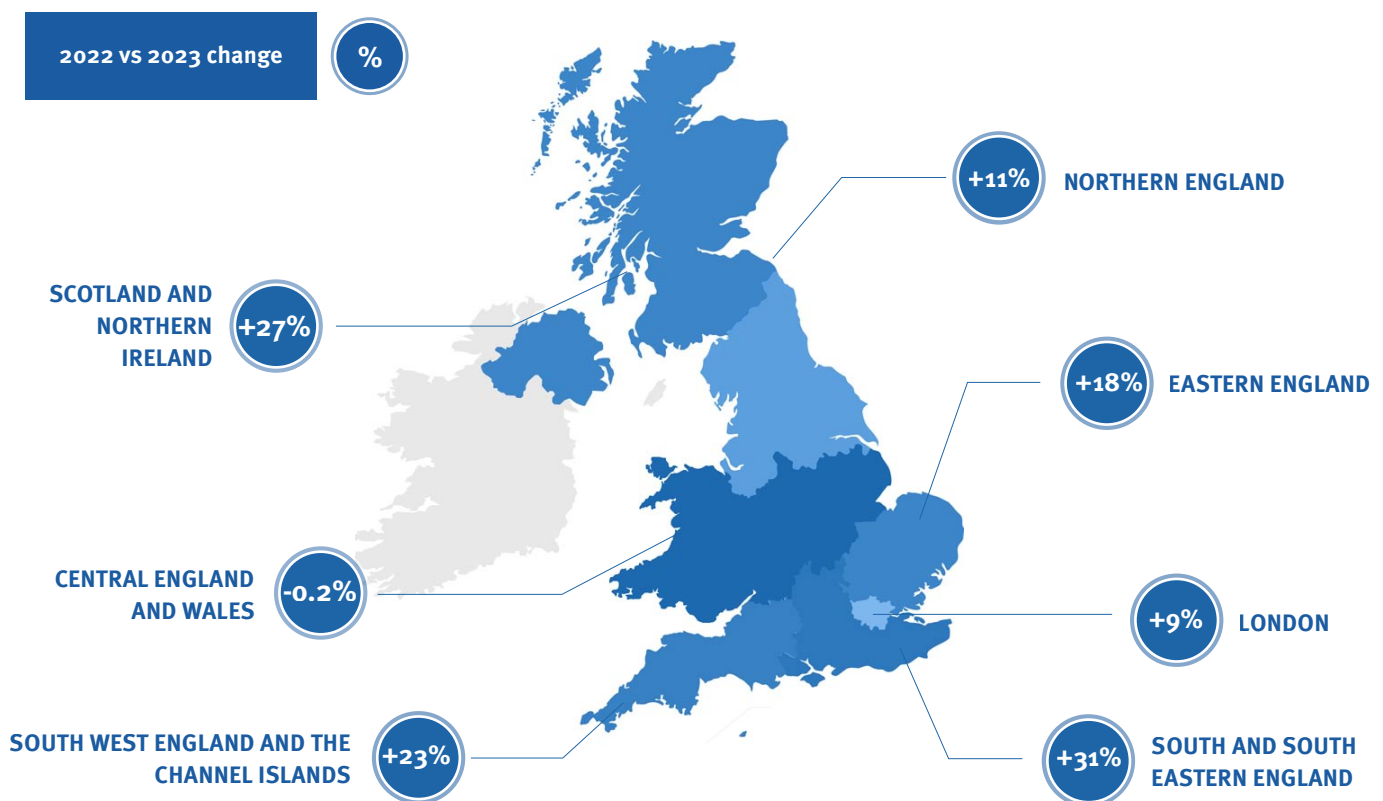
Percentage-wise, ‘South and South Eastern England’ and London attracted the largest shares of student weeks, with 26% each.

**Chart 8:** Top ten cities – age group distribution (ranked by overall student week volume)



**Source:** English UK, 2023; n=320 member centres

**Chart 9:** Regional 2022 vs 2023 change in overall student weeks



**Source:** English UK, 2022 and 2023, n=307. The analysis of changes is based on data from centres reporting in both 2022 and 2023 (307 centres) for a more accurate assessment.

**Note:** 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 2023, nearly every region saw a like-for-like increase in student weeks compared to 2022. The sole exception was ‘Central England and Wales’, which recorded a marginal decrease of less than 1%.

The largest increase was seen in ‘South and South Eastern England’, with a +31% increase compared to 2022. This translates to by far the highest increase in absolute numbers as well, at +70,875 student weeks. The next highest increases were seen in ‘South West England & The Channel Islands’ (+27,976 student weeks) and London (+24,503 student weeks).

However, none of the regions reached its pre-pandemic volume. The highest recovery level (81%) was achieved in two regions: ‘South and South Eastern England’ and ‘South West England & The Channel Islands’.

London experienced a solid 76% recovery, followed by Northern England (67%), Eastern England (63%), and ‘Central England and Wales’ (60%). As in 2022, ‘Scotland and Northern Ireland’ had the lowest recovery levels (35%, up from 29% in 2022).

## 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 (2022) n=329	Student weeks (2023) n=320	Share (% 2023)	Student numbers (2022) n=329	Student numbers (2023) n=320	Share (% 2023)	Average length of stay (2023)
1	Italy	108,890	173,078	15.0%	48,986	89,344	26.0%	1.9
2	Saudi Arabia	142,088	146,189	12.7%	13,360	14,262	4.2%	10.3
3	Spain	57,515	74,501	6.5%	21,165	39,707	11.6%	1.9
4	Brazil	45,643	60,303	5.2%	10,581	15,257	4.4%	4.0
5	Turkey	39,935	57,639	5.0%	6,096	12,413	3.6%	4.6
6	France	48,900	56,923	4.9%	17,060	22,639	6.6%	2.5
7	China	52,074	55,823	4.8%	5,999	16,365	4.8%	3.4
8	Japan	47,934	52,491	4.5%	5,796	10,063	2.9%	5.2
9	Switzerland	45,178	45,511	3.9%	10,114	10,483	3.1%	4.3
10	Germany	36,911	38,527	3.3%	18,363	20,382	5.9%	1.9
11	Kuwait	39,948	34,541	3.0%	3,399	3,053	0.9%	11.3
12	South Korea	24,525	31,880	2.8%	2,162	3,164	0.9%	10.1
13	Colombia	13,364	28,559	2.5%	1,306	3,636	1.1%	7.9
14	Thailand	17,103	22,443	1.9%	1,906	4,746	1.4%	4.7
15	Argentina	15,461	22,061	1.9%	5,690	8,151	2.4%	2.7
16	Oman	15,730	17,549	1.5%	1,865	2,048	0.6%	8.6
17	Chile	15,466	15,369	1.3%	2,301	2,577	0.8%	6.0
18	Taiwan	7,096	15,130	1.3%	861	3,516	1.0%	4.3
19	Mexico	13,380	14,992	1.3%	2,726	3,804	1.1%	3.9
20	Ukraine	11,309	10,449	0.9%	1,805	2,125	0.6%	4.9

**Source:** English UK, 2023; performance based on statistics collected from the entire sample for 2023 n=320, for 2022 n=329

The top 20 source markets accounted for 84% of student numbers and 84% of student weeks in 2023. Seventeen of these markets experienced growth compared to the previous year.

Student weeks from Saudi Arabia registered a small (2%) increase. This is a sign that the market is stabilising. After growth in 2022, this source country has now almost reached its pre-pandemic student week volume (85%). While absolute numbers are expected to remain high, percentage growth is anticipated to slow down from this point forward. Future growth will likely depend on the mobility of self-funded students or the emergence of new scholarship schemes.

On the other hand, Italy picked up the pace after a slow 2021 and 2022 and surpassed Saudi Arabia as the top source market for the UK ELT sector in 2023. Italy's student weeks grew by 57%, the third highest year-on-year growth in 2023. The country reached 73% of its

pre-pandemic volume (47% in 2022).

Italy's performance may have been influenced specifically by the launch of the Estate INPSieme Estero scholarship scheme at the beginning of 2023. This scheme funded short (low cost) study abroad holidays for Italian secondary school students and led to heightened competition and price fluctuations. While Italy will continue to be a leading source market for the UK, diversifying the student population by incorporating higher-margin source markets will be essential.

Spain showed steady growth in the UK market (+26% compared to 2022) as well as in other global ELT destinations, particularly in the junior segment. France is another interesting junior market: since the end of 2023, many French student groups have been able to travel to the UK without passports, possibly boosting mobility for the UK ELT sector.

GENERAL OVERVIEW

# TOP SOURCE MARKETS

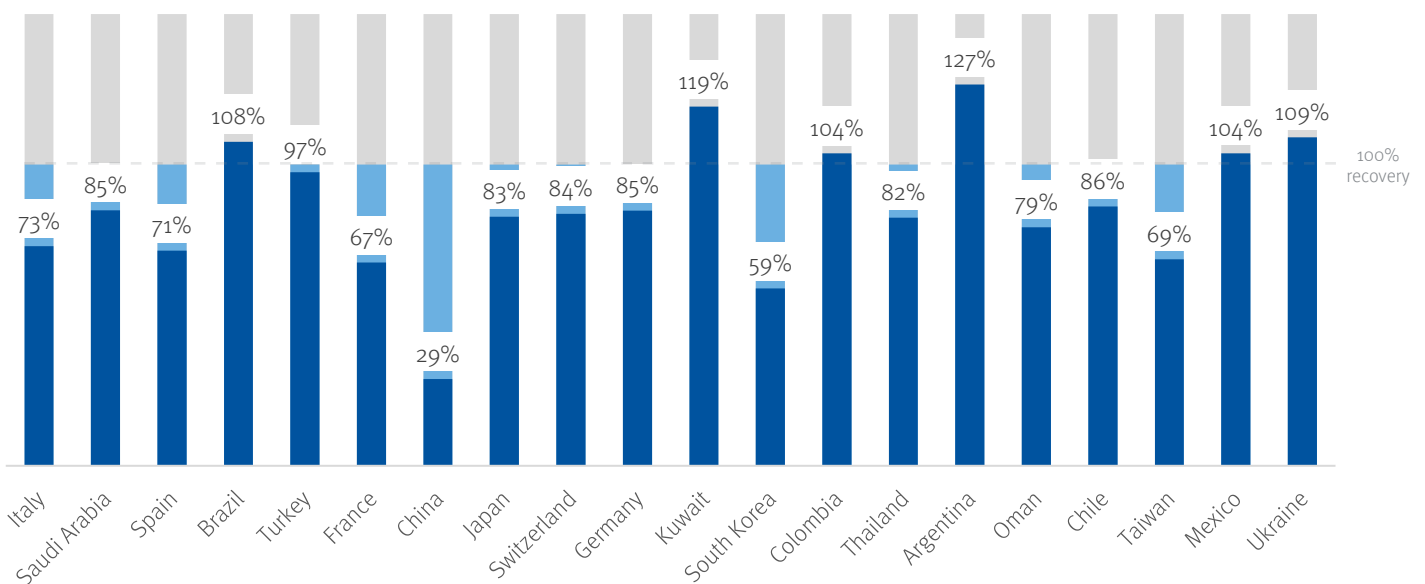
Looking at other top source markets, Turkey rose from 10<sup>th</sup> place to become the fifth source market in 2023. This shift was driven by students seeking alternatives to Canada and the US due to visa restrictions. Active lobbying efforts by English UK also helped. This signals the country’s potential as a key market going forward.

China saw a 13% increase compared to 2022, although it dropped to 7<sup>th</sup> place. The lifting of travel restrictions in 2023 still

affected outbound Chinese student numbers because they normally plan trips abroad well in advance (booking 10–12 months prior to travelling). China’s performance in 2024 will be indicative of its recovery.

Ongoing shifts are expected in international student mobility in the coming years. It is essential to closely monitor the performance of each destination and consider the impact of new visa policies and refusal rates on students’ study choices.

**Chart 10: Top 20 source markets (rank by overall student weeks, 2023) and their recovery level (2019 vs 2023 volume)**



**Source:** English UK, 2023; n=286

**Note:** The analysis of recovery levels is based on data from centres reporting in both 2019 and 2023 (286 centres) for a more accurate assessment.

The average recovery rate among the top 20 source markets was 86%, surpassing the 2023 overall recovery rate of 71%.

Among the top 20 source markets, six exceeded their 2019 volumes. Four of these were in Latin America: Brazil, Colombia, Argentina, and Mexico. This trend highlights the promising potential of these markets and the Latin American region overall. Kuwait and Ukraine also exceeded their pre-pandemic levels.

China showed the slowest recovery among the top 20 source markets, although there was a slight improvement from 26% in 2022 to 29% in 2023. With China lifting its travel restrictions fully in 2023, further recovery is anticipated in 2024.

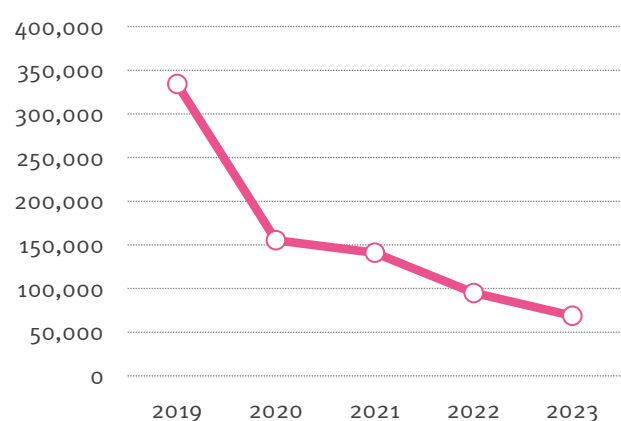
Additionally, Japan has large potential for further recovery in the coming years. The Japanese government aims to boost the number of Japanese students by five times by 2032, reaching around half a million students. Also, starting January 2024, there has been an expansion of the UK-Japan Youth Mobility Scheme, which is expected to bring more Japanese students to the UK to study English.

Overall, the UK saw a slow but steady recovery, which is promising. The UK’s approach is also currently perceived as more welcoming than some competitor destinations. For instance, Australia and the USA are grappling with high visa refusal rates, while Canada has caps on the number of international students.

# STATE SECTOR MEMBER CENTRES

## MARKET OVERVIEW

**Chart 11:** Student weeks taught by English UK state sector member centres



**Source:** English UK, 2019-2023

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

**Table 3:** Like-for-like comparison of 2022 vs 2023 (state sector)

	Student numbers	Student weeks
2022	9,196	84,801
2023	8,195	68,846
Change (%)	-11%	-19%

**Source:** English UK, 2023; n=29 state sector member centres

Compared to 2022, overall there was an 11% drop in student numbers in the UK state sector, along with a 19% decrease in student weeks. Globally, the state sector is encountering challenges; in particular, it is recovering at a slower pace than the private sector.

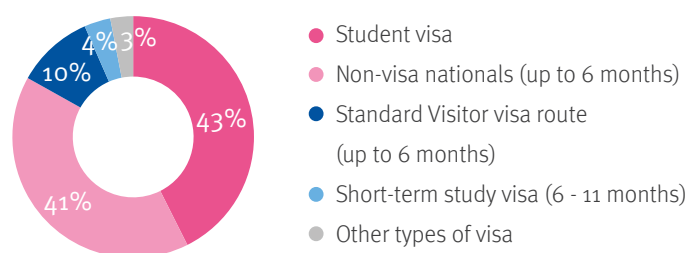
This discrepancy has sparked discussions across ELT associations and providers about the future prospects of the state sector, especially in terms of exploring new markets and offering new products.

Of the 30 state sector English UK member centres, 29 provided data for this report. Among these, 15 operated within the higher education sector, while 14 were further education providers.

Collectively, they taught 8,195 English language students in 2023 and delivered 68,846 student weeks. The total numbers in the state sector have been decreasing since 2019. This decline has also been affected by a continuous drop in the number of member centres.

As in the previous year, slightly more than half of state sector providers (56%) taught over 1,000 students per centre.

**Chart 12:** Student numbers by visa type (state sector)



**Source:** English UK, 2023; n=29 state sector member centres

**Note:** Percentages may not add up to 100% due to rounding.

**Note:** For 2023, a separate category for 'non-visa nationals studying under 6 months' was introduced.

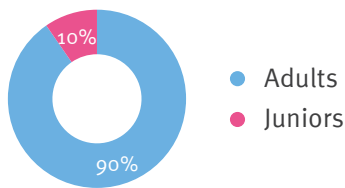
In 2023, there were differences in the visa entry routes popular among English language students at state sector member centers compared to those studying at private sector centers.

Forty-three per cent of students at state sector member centers enrolled with Student visas. Fifty-one per cent came through visa routes allowing study for a maximum of 6 months. In contrast, 92% of private sector member centers' students used the 'up to 6 months' routes.

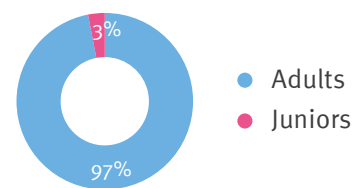
# STATE SECTOR MEMBER CENTRES ADULT VS JUNIOR SEGMENT

**Chart 13:** 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, 2023; n=29 state sector member centres

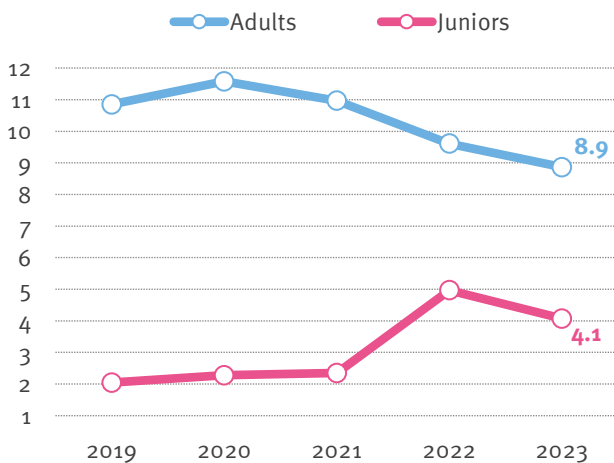
Adult student numbers and student weeks declined in 2023 (-23% and -29%, respectively). This trend has remained consistent since 2020.

In contrast, there has been a consistent increase in juniors studying with state sector providers over the years, although the figures were much smaller. The state sector’s ability to attract more junior students suggests that proficiency levels

are rising among younger learners. The percentage of further and higher education providers teaching juniors in 2023 remained stable at 21%. This share is slightly lower than pre-pandemic (26%).

Overall, adults continued to dominate the state sector, representing 90% of all student numbers and accounting for 97% of total student weeks.

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



**Source:** English UK, 2023; n=29 state sector member centres

The overall average length of stay in 2023 was 8.4 weeks, the shortest since 2017. For comparison, it was 9.3 weeks in 2022 and 9.8 weeks in 2019.

Adults stayed for an average of 8.9 weeks, two weeks shorter than in 2019. Juniors stayed for an average of 4.1 weeks; an increase of two weeks compared to 2019.

Students from Romania and Saudi Arabia had the longest average stay, at 15.3 and 14.4 weeks, respectively. On the other hand, students from Italy, Germany, and Spain opted for shorter stays, at 4.0, 3.5, and 2.2 weeks, respectively.

## STATE SECTOR MEMBER CENTRES

# SOURCE REGIONS

**Table 4:** Student weeks, students and average length of stay (weeks) by source region (state sector, rank by student weeks)

Country/region	Student weeks (2022) n=34	Student weeks (2023) n=29	Student numbers (2022) n=34	Student numbers (2023) n=29	Average length of stay (2023)	Change in student weeks (%) n=29	Change in student numbers (%) n=29
<b>Overall data</b>					<b>Like-for-like comparison</b>		
Asia	51,688	35,045	5,882	4,019	8.7	-23.1%	-24.0%
Middle East	16,958	13,715	1,263	1,049	13.1	-8.4%	-4.6%
Eastern Europe	12,850	7,845	1,041	673	11.7	-37.1%	-33.4%
Western Europe	8,042	7,080	1,604	1,996	3.5	0.1%	34.0%
Latin America	2,680	3,173	187	298	10.6	34.6%	93.5%
Africa	2,492	1,856	168	149	12.5	-14.4%	6.4%
North America	338	132	27	11	12.0	-26.7%	-21.4%
Australasia	29	0	3	0	n/a	-100.0%	-100.0%

**Source:** English UK, 2023; n=29 state sector member centres in 2023, n=34 state sector member centres in 2022 (y-o-y changes are based on a sample of 29 providers reporting in both 2022 and 2023 to provide a like-for-like comparison).

Asia remained the primary region for the state sector in 2023, contributing 51% of all student weeks and 49% of all student numbers. In 2023, the state sector taught 4,019 students from Asia, recording 35,045 student weeks.

The Middle East maintained its position as the second-largest region for the state sector in 2023, accounting for 20% of student weeks and 13% of student numbers. This region saw declines in both student numbers and student weeks. However, these decreases were relatively small, at -8% and -5%, respectively. Students from the Middle East had the longest average stay in 2023, at 13.1 weeks.

In terms of prospects for future growth, Latin America emerged as a promising region, recording a 94% increase in student numbers and a 35% increase in student weeks. Its

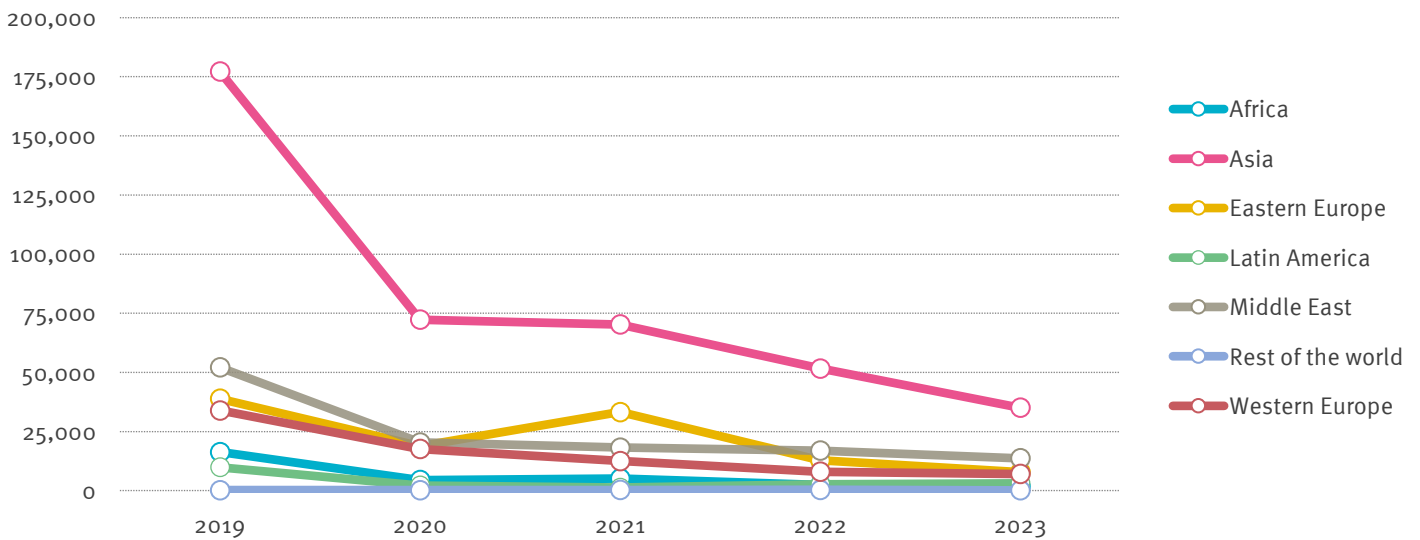
overall share in the state sector also grew from 3% in 2019 to 5% in 2023.

Based on like-for-like data, Western Europe showed a stable performance, similar to 2022, with a slight increase in student weeks (+0.1%). Student numbers increased by 34%, leading to the region having the shortest average length of stay in the state sector (3.5 weeks).

Meanwhile, Eastern Europe, ranking third in 2023, experienced ongoing rapid declines (-37% in student weeks and -33% in student numbers), continuing the trend seen in 2022.

Student weeks from Africa saw a slight decline from 2022 (-14%), while African student numbers grew slightly (+6%).

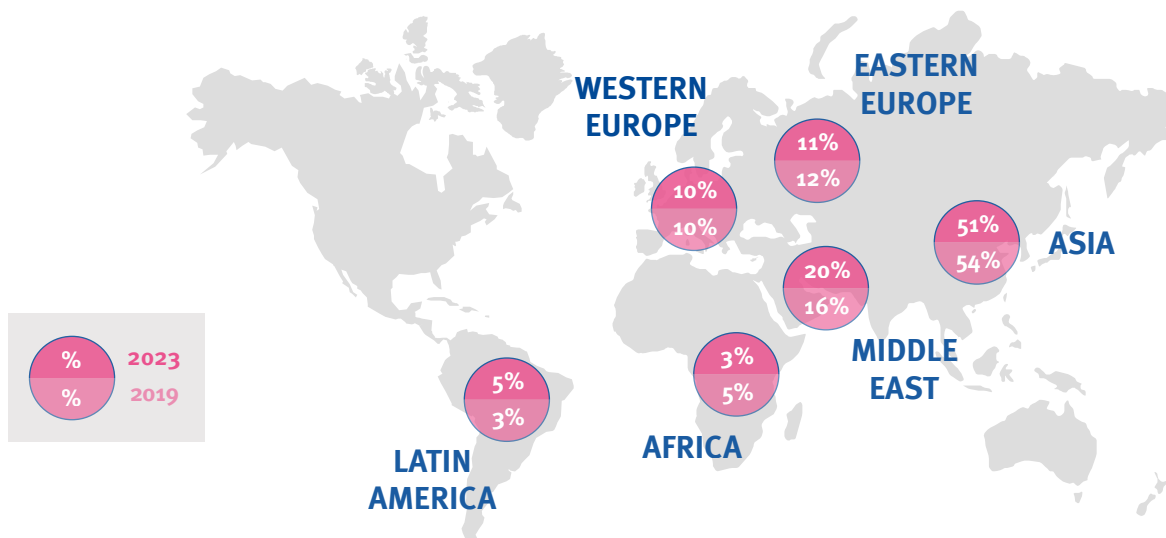
**Chart 15:** Student weeks by source region (2019-2023, state sector)



**Source:** English UK, 2019-2023

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

**Chart 16:** Source region market shares (UK ELT, student weeks at state sector centres, 2019 vs 2023)



**Source:** English UK, in 2023 n=30, in 2019 n=54

**Note:** Based on absolute figures, there was a fluctuation in English UK membership in these years.

## STATE SECTOR MEMBER CENTRES

# SOURCE MARKETS

In 2023, China remained the leading source market for the state sector despite a 40% decrease in student weeks and 44% drop in student numbers compared to 2022. Despite this decline, China still recorded double the student weeks and four times the student numbers generated by the second-ranked Saudi Arabia. Chinese student numbers, however, have not yet returned to their pre-

pandemic levels, with only a 20% recovery for the state sector. These figures raise questions about the market's potential for full recovery.

This is an important consideration as the market offering Intensive English and Pathway programmes has been developing in China and the Asian region, becoming direct competition for UK providers.

**Table 5: Student weeks, students and average length of stay (weeks) by source market (state sector, rank by student weeks)**

Rank	Country/region	Student weeks (2022) n=34	Student weeks (2023) n=29	Student numbers (2022) n=34	Student numbers (2023) n=29	Average length of stay (2023)	Change in student weeks (%) n=29	Change in student numbers (%) n=29
<b>Overall data</b>						<b>Like-for-like comparison</b>		
1	China	36,304	19,623	4,262	2,172	9.0	-39.8%	-44.2%
2	Saudi Arabia	8,509	7,866	606	545	14.4	0.5%	-0.7%
3	Japan	4,259	5,537	499	811	6.8	36.7%	70.4%
4	Romania	7,401	4,698	609	308	15.3	-36.2%	-49.2%
5	Kuwait	3,935	2,694	219	207	13.0	-22.9%	14.4%
6	South Korea	1,367	2,406	119	275	8.7	100.3%	161.9%
7	Other Asia/Far East	2,295	2,249	234	249	9.0	6.7%	12.2%
8	Italy	1,889	2,104	266	526	4.0	20.0%	108.7%
9	Turkey	1,494	1,557	213	167	9.3	31.8%	-10.2%
10	Germany	1,760	1,553	384	439	3.5	-7.9%	16.1%
11	Brazil	971	1,324	62	133	10.0	52.7%	155.8%
12	Spain	1,145	1,017	263	453	2.2	5.2%	108.8%
13	Ukraine	1,446	992	108	108	9.2	-21.1%	16.1%
14	Taiwan	1,211	967	134	108	9.0	10.4%	8.0%
15	Pakistan	1,433	946	103	59	16.0	-13.9%	-29.8%
	Thailand	1,205	946	127	136	7.0	-1.7%	38.8%
17	Poland	1,738	872	143	80	10.9	-49.8%	-44.1%
18	Panama	618	850	27	34	25.0	41.7%	36.0%
19	Nigeria	899	836	51	58	14.4	-3.1%	20.8%
20	Hong Kong	988	699	93	57	12.3	-24.9%	-34.5%
21	France	686	595	125	107	5.6	-5.6%	-10.1%
22	India	954	582	112	52	11.2	-1.5%	-39.5%
23	Switzerland	517	572	76	109	5.2	18.2%	51.4%
24	Netherlands	492	555	295	269	2.1	12.8%	-8.8%
25	Other Africa	855	488	61	46	10.6	-31.6%	-4.2%

- **Overall data** – performance of source markets based on statistics collected from the entire sample (29 in 2023 and 34 in 2022);
- **Like-for-like comparison** – y-o-y benchmark based on data from centres reporting in both 2022 and 2023 (29 centres) for a more accurate assessment of source market performance trends.

Among the 114 source markets, 40 experienced growth compared to 2022, while 14 remained stable and 60 saw a decrease. Romania saw a further decline in student weeks (-36%) and fell from 3<sup>rd</sup> to 4<sup>th</sup> place in 2023. It was surpassed by Japan, which saw a 37% increase in student weeks. Japan’s international growth is also notable, with students increasingly

opting for foundation and pathway programmes abroad. Additionally, the UK-Japan Youth Mobility Scheme is set to further boost Japanese student numbers in the coming years.

South Korea registered the second-largest year-on-year increase in absolute figures for the state sector (+1,205 student weeks).

Rank	Country/region	Student weeks (2022) n=34	Student weeks (2023) n=29	Student numbers (2022) n=34	Student numbers (2023) n=29	Average length of stay (2023)	Change in student weeks (%) n=29	Change in student numbers (%) n=29
<b>Overall data</b>						<b>Like-for-like comparison</b>		
26	Iran	535	291	38	31	9.4	-16.4%	24.0%
27	Iraq	618	287	45	21	13.7	-49.7%	-48.8%
28	Oman	402	285	33	22	13.0	-22.1%	-29.0%
29	United Kingdom	643	264	51	23	11.5	-20.2%	-14.8%
30	Syria	388	253	26	15	16.9	-32.7%	-40.0%
31	Indonesia	372	242	47	25	9.7	-18.5%	-39.0%
32	Vietnam	436	232	51	25	9.3	-34.1%	-45.7%
33	Other East./Centr. Europe	0	208	0	13	16.0	n/a	n/a
34	Slovakia	300	207	15	15	13.8	-31.0%	0.0%
35	Argentina	202	191	18	41	4.7	-1.5%	141.2%
36	Hungary	185	174	22	20	8.7	-5.9%	-9.1%
37	Egypt	239	171	17	15	11.4	10.3%	25.0%
38	Chile	149	161	11	15	10.7	46.4%	114.3%
39	Other Central America	71	159	6	13	12.2	123.9%	116.7%
40	Mexico	263	157	17	18	8.7	-15.6%	80.0%
41	Uzbekistan	56	147	4	12	12.3	162.5%	200.0%
42	Belgium	47	144	6	13	11.1	311.4%	160.0%
43	Tajikistan	4	143	1	9	15.9	3475.0%	800.0%
44	Ecuador	170	142	8	8	17.8	-16.5%	0.0%
45	Libya	207	131	15	8	16.4	-36.7%	-46.7%
	Russia	294	131	31	14	9.4	-29.6%	-39.1%
47	Bulgaria	864	130	54	9	14.4	-84.7%	-83.0%
48	Jordan	160	129	18	11	11.7	35.8%	-8.3%
49	Czech Republic	63	121	9	58	2.1	92.1%	544.4%
50	Kazakhstan	226	110	38	9	12.2	-8.3%	-18.2%

- Overall data** – performance of source markets based on statistics collected from the entire sample (29 in 2023 and 34 in 2022);
- Like-for-like comparison** – y-o-y benchmark based on data from centres reporting in both 2022 and 2023 (29 centres) for a more accurate assessment of source market performance trends.

## STATE SECTOR MEMBER CENTRES

# SOURCE MARKETS

Rank	Country/region	Student weeks (2022) n=34	Student weeks (2023) n=29	Student numbers (2022) n=34	Student numbers (2023) n=29	Average length of stay (2023)	Change in student weeks (%) n=29	Change in student numbers (%) n=29
<b>Overall data</b>						<b>Like-for-like comparison</b>		
51	Morocco	117	108	7	10	10.8	10.2%	100.0%
52	United Arab Emirates	362	104	26	9	11.6	-61.5%	-57.1%
53	Latvia	252	100	17	9	11.1	-59.7%	-43.8%
54	Algeria	150	98	14	9	10.9	-19.0%	-18.2%
55	USA	276	92	21	7	13.1	-25.2%	-22.2%
56	Colombia	64	73	6	8	9.1	247.6%	300.0%
57	Iceland	162	71	67	35	2.0	-56.2%	-47.8%
	Portugal	189	71	11	9	7.9	-59.9%	-10.0%
59	Peru	87	58	10	5	11.6	0.0%	-16.7%
60	Azerbaijan	45	57	4	6	9.5	72.7%	100.0%
61	Slovenia	35	55	14	24	2.3	57.1%	71.4%
62	Bahrain	179	52	12	6	8.7	-68.5%	-40.0%
	Other Middle East	10	52	1	3	17.3	420.0%	200.0%
64	Malaysia	179	49	13	4	12.3	-62.6%	-55.6%
	Nepal	19	49	7	4	12.3	880.0%	-20.0%
66	Albania	76	43	5	3	14.3	-32.8%	-25.0%
67	Lebanon	113	41	9	2	20.5	0.0%	-33.3%
68	Other North America	35	40	3	4	10.0	14.3%	33.3%
69	Moldova	44	38	3	3	12.7	-13.6%	0.0%
70	Finland	34	37	23	1	37.0	68.2%	-95.5%
71	Qatar	113	33	8	3	11.0	-70.8%	-62.5%
72	Israel	15	30	2	3	10.0	400.0%	200.0%
73	Greece	177	28	15	2	14.0	-78.8%	-81.8%
	Lithuania	75	28	5	2	14.0	-62.7%	-60.0%
75	Austria	56	24	4	4	6.0	-45.5%	33.3%
	Tunisia	11	24	1	3	8.0	118.2%	200.0%
	Venezuela	26	24	2	1	24.0	-7.7%	-50.0%
78	Denmark	11	23	1	2	11.5	109.1%	100.0%
	Yemen	64	23	2	2	11.5	-64.1%	0.0%
80	Belarus	22	22	2	2	11.0	0.0%	0.0%
81	Cyprus	24	18	2	2	9.0	n/a	n/a
	Palestine	61	18	5	2	9.0	-63.3%	-50.0%

- i** • **Overall data** – performance of source markets based on statistics collected from the entire sample (29 in 2023 and 34 in 2022);
- **Like-for-like comparison** – y-o-y benchmark based on data from centres reporting in both 2022 and 2023 (29 centres) for a more accurate assessment of source market performance trends.

Rank	Country/region	Student weeks (2022) n=34	Student weeks (2023) n=29	Student numbers (2022) n=34	Student numbers (2023) n=29	Average length of stay (2023)	Change in student weeks (%) n=29	Change in student numbers (%) n=29
Overall data						Like-for-like comparison		
83	Other Western Europe	32	17	4	2	8.5	-5.6%	0.0%
84	Costa Rica	0	14	0	1	14.0	n/a	n/a
85	Paraguay	0	12	0	19	0.6	n/a	n/a
86	Kyrgyzstan	36	11	4	1	11.0	-69.4%	-75.0%
	Macao	6	11	1	1	11.0	83.3%	0.0%
	Mongolia	45	11	4	1	11.0	n/a	n/a
	Singapore	47	11	3	1	11.0	0.0%	0.0%
	Turkmenistan	29	11	3	1	11.0	-35.3%	-50.0%
91	Uruguay	6	8	15	2	4.0	33.3%	-86.7%
92	Cambodia	90	6	6	1	6.0	-85.7%	-66.7%
	Estonia	31	6	2	1	6.0	-80.6%	-50.0%
94	Sweden	49	3	4	1	3.0	-93.9%	-75.0%
95	Luxembourg	2	2	1	1	2.0	0.0%	0.0%
96	Macedonia	0	1	0	1	1.0	n/a	n/a
	Serbia	0	1	0	1	1.0	n/a	n/a
98	Angola	14	0	2	0	n/a	n/a	n/a
	Armenia	12	0	1	0	n/a	n/a	n/a
	Australia	23	0	2	0	n/a	-100.0%	-100.0%
	Bolivia	11	0	2	0	n/a	-100.0%	-100.0%
	Bosnia and Herzegovina	0	0	0	0	n/a	n/a	n/a
	Canada	27	0	3	0	n/a	-100.0%	-100.0%
	Croatia	0	0	0	0	n/a	n/a	n/a
	Georgia	0	0	0	0	n/a	n/a	n/a
	Ireland	70	0	5	0	n/a	-100.0%	-100.0%
	Liechtenstein	0	0	0	0	n/a	n/a	n/a
	Monaco	0	0	0	0	n/a	n/a	n/a
	Montenegro	0	0	0	0	n/a	n/a	n/a
	New Zealand	6	0	1	0	n/a	-100.0%	-100.0%
	Norway	81	0	3	0	n/a	-100.0%	-100.0%
	Other Australasia	0	0	0	0	n/a	n/a	n/a
	Other South America	42	0	3	0	n/a	-100.0%	-100.0%
	Philippines	70	0	12	0	n/a	-100.0%	-100.0%

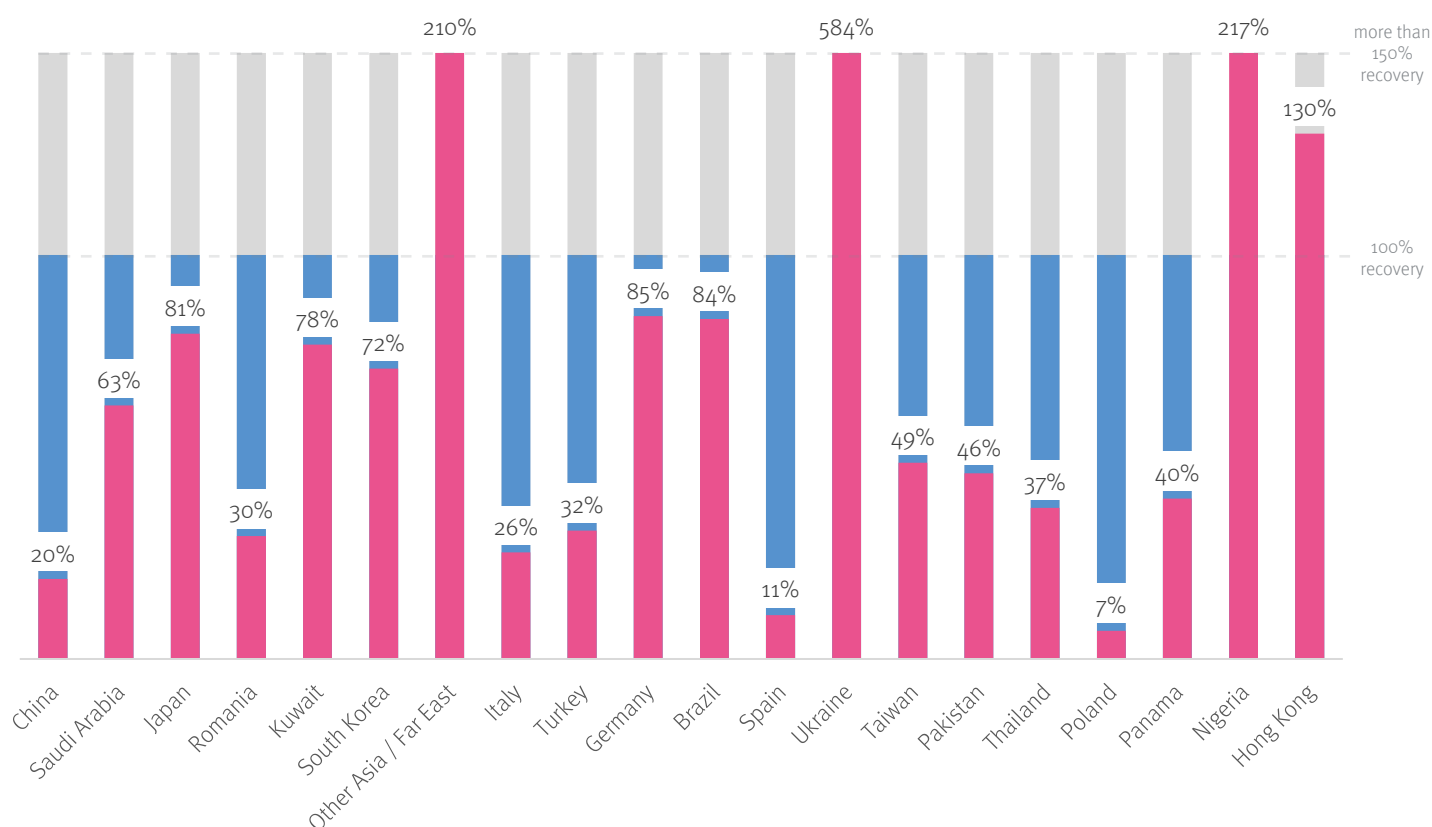
- **Overall data** – performance of source markets based on statistics collected from the entire sample (29 in 2023 and 34 in 2022);
- **Like-for-like comparison** – y-o-y benchmark based on data from centres reporting in both 2022 and 2023 (29 centres) for a more accurate assessment of source market performance trends.

Source: English UK, 2023

## STATE SECTOR MEMBER CENTRES

# SOURCE MARKETS

**Chart 17:** Top 20 state sector source markets (rank by state sector student weeks, 2023) and their recovery level (2019 vs 2023 volume)



**Source:** English UK, 2023; n=27

**Note:** The analysis of recovery levels is based on data from state sector centres reporting in both 2019 and 2023 (27 centres) for a more accurate assessment.

### Recovery levels

The recovery rates among source markets in the state sector were uneven. The average recovery rate for the top 20 state sector source markets was 95%, far surpassing its overall recovery rate of 27%. This was largely due to strong recoveries in Other Asia/Far East source markets, Ukraine, Nigeria, and Hong Kong.

On the contrary, half of the state sector's top 20 source markets registered recovery rates lower than 50%. Notably, China, as the top source market for state sector, only reached 20% of its pre-pandemic student week volume. Spain and Poland reached even lower recoveries, with 11% and 7%, respectively.

### UK regions

The top source markets across UK regions varied. China was the leading source market in 'Central England and Wales' and Northern England, with 9,447 and 9,657 student weeks, respectively.

In 'London and Eastern England', Romania contributed the highest number of student weeks, while in 'South and South Eastern England', Japan emerged as the most popular source market in 2023.

**Table 6:** Top 10 state sector source markets by UK region (student weeks)

Rank	Central England and Wales n=7		London and Eastern England n=5		Northern England n=6	
1	China	9,447	Romania	4,675	China	9,657
2	Saudi Arabia	4,350	Other Asia/Far East	1,397	Saudi Arabia	2,497
3	Kuwait	614	Poland	827	Kuwait	2,021
4	Hong Kong	514	Saudi Arabia	800	Japan	1,384
5	Brazil	476	South Korea	443	South Korea	1,230
6	Taiwan	396	Italy	438	Turkey	1,001
7	Nigeria	309	China	325	Nigeria	485
8	Oman	240	Turkey	284	Taiwan	478
9	Thailand	235	India	229	Pakistan	435
10	Other Asia/Far East	212	Thailand	207	Thailand	353

Rank	Scotland and Northern Ireland n=5		South and South Eastern England n=6		South West England and The Channel Islands n=0	
1	Panama	850	Japan	3,685	n/a	n/a
2	Japan	143	Italy	1,547	n/a	n/a
3	Spain	64	Germany	1,434	n/a	n/a
4	Italy	57	Spain	702	n/a	n/a
5	Pakistan	44	Brazil	681	n/a	n/a
6	Germany	39	Netherlands	531	n/a	n/a
7	France	38	South Korea	515	n/a	n/a
8	Saudi Arabia	37	Switzerland	510	n/a	n/a
9	Brazil	36	Ukraine	364	n/a	n/a
10	South Korea	35	Other Asia/Far East	364	n/a	n/a

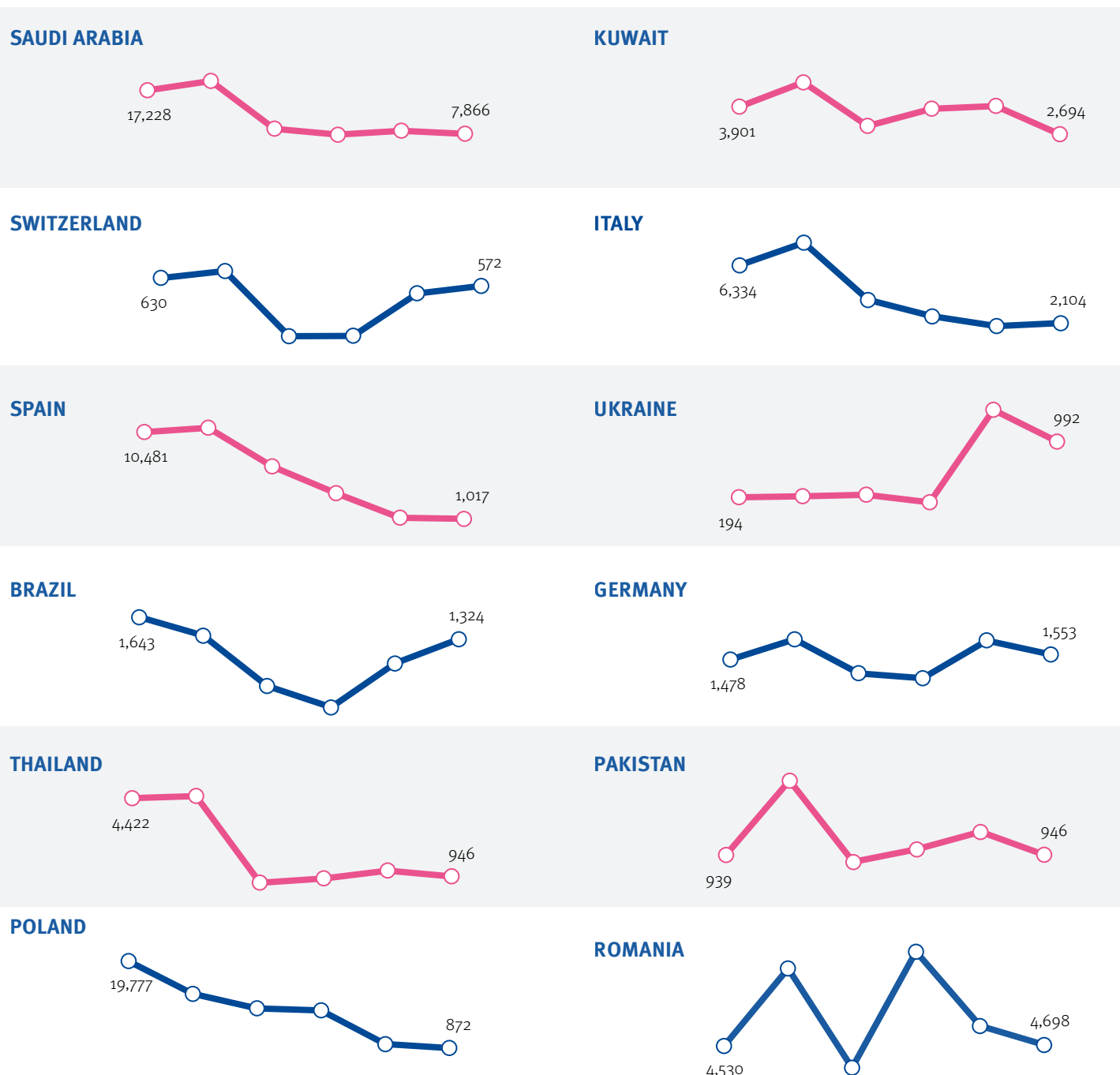
**Source:** English UK, 2023; n=29 member centres

**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 2023.

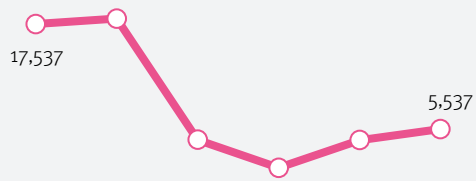
# STATE SECTOR MEMBER CENTRES

## SOURCE MARKETS

Chart 18: Performance of selected source markets (student weeks, state sector, 2018-2023)



**JAPAN**



**FRANCE**



**TURKEY**



**CHINA/HONG KONG**



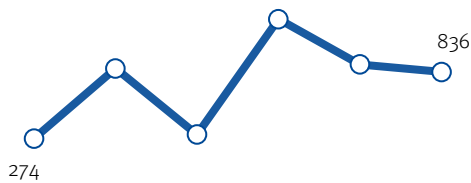
**PANAMA**



**SOUTH KOREA**



**NIGERIA**



**INDIA**



**NETHERLANDS**



**TAIWAN**

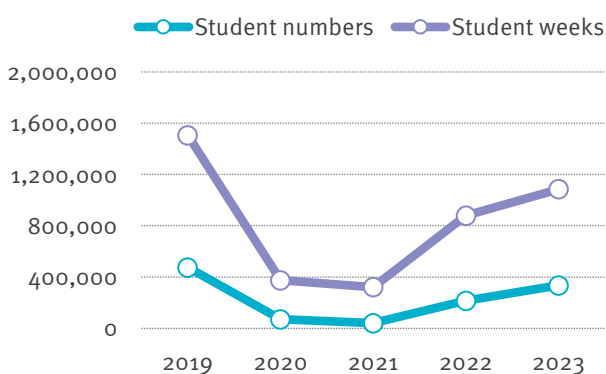


**Source:** English UK, 2018-2023

**Note:** Figures do not reflect the fluctuation in the English UK membership over the measured period. Please see Chart 3 for more details.

# PRIVATE SECTOR MEMBER CENTRES MARKET OVERVIEW

**Chart 19:** Student numbers and student weeks taught by English UK private sector member centres



**Source:** English UK, 2019-2023

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

**Table 7:** Like-for-like comparison of 2022 vs 2023 (private sector)

	Student numbers	Student weeks
2022	212,785	870,398
2023	321,580	1,051,875
Change (%)	+51%	+21%

**Source:** English UK, 2023; n=278 private sector member centres

Student numbers in the private sector surged by 51%, while student weeks increased by 21%, according to a like-for-like comparison with 2022 figures.

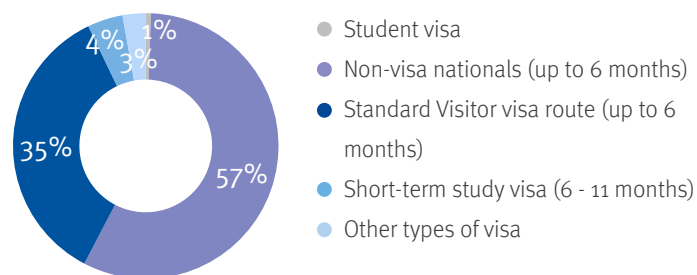
Private sector members recovered 78% of their 2019 student numbers and 79% of student weeks. The recovery rate in both indicators is higher than in 2022 (52% for student numbers and 66% for student weeks).

As in previous years, the private sector demonstrated a robust performance and fuelled growth in the sector. In 2023, 291 of the 293 private sector English UK members contributed data for the report.

These centres taught 334,931 students and reported 1,085,022 student weeks. This is the first time since 2019 that the sector reached the milestone of over one million student weeks.

The ten largest private sector providers represented 19% of all student weeks.

**Chart 20:** Student numbers by visa type (private sector)



**Source:** English UK, 2023; n=291 private sector member centres

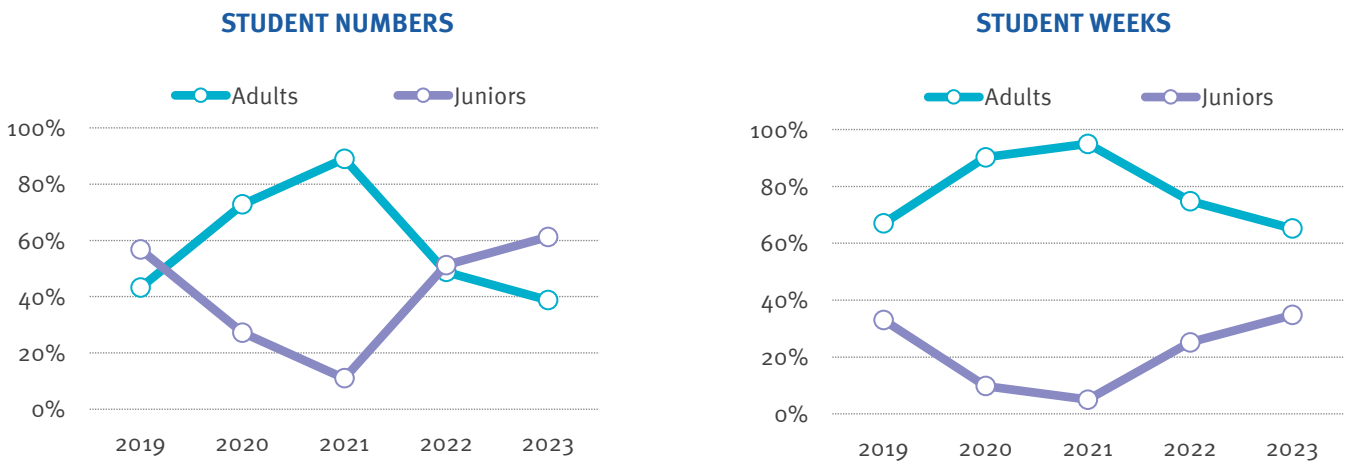
**Note:** For 2023, a separate category for 'non-visa nationals studying under 6 months' was introduced.

In 2023, 57% students studying on English language courses with private sector member centres used the non-visa national route (valid for EU nationals and ETA/EVW holders). The second highest proportion (35%) entered on the Standard Visitor visa route.

In contrast to those studying with state sector members (where it was 47%) only 5% of students were on visa routes that allowed study for longer than 6-months.

# PRIVATE SECTOR MEMBER CENTRES ADULT VS JUNIOR SEGMENT

**Chart 21:** Share of adults and juniors out of the total number of students and student weeks in the UK (private sector)



**Source:** English UK, 2019-2023

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

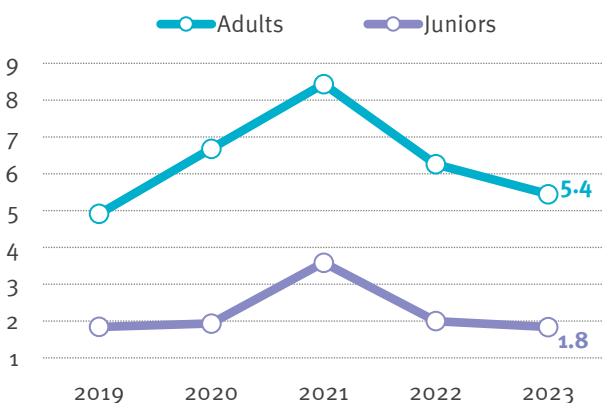
Both adult and junior student numbers and student weeks grew in 2023. However, juniors experienced faster growth, with increases of 86% in student numbers and 71% in student weeks (compared to +24% and +8% for adults, respectively).

Junior student numbers reached a milestone of over 200,000

students, a figure that was standard pre-pandemic (being true for every year from 2013 to 2019).

Juniors made up 61% of all student numbers and 35% of all student weeks in the private sector. This marked their historically highest shares for each category since 2010.

**Chart 22:** Average length of stay (weeks, private sector)



**Source:** English UK, 2019-2023

The average length of stay returned to pre-pandemic levels, matching the 3.2 weeks seen in 2019. For comparison, it was 7.9 weeks in 2021 and 4.1 weeks in 2022.

As usual, adults pursued longer studies, averaging 5.4 weeks, while juniors favoured shorter stays, at 1.8 weeks (as in 2019).

Most students from European countries opted for shorter stays, while those from the Middle East, Asia, and Latin America preferred longer stays.

## PRIVATE SECTOR MEMBER CENTRES

# SOURCE REGIONS

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

Country/region	Student weeks (2022) n=295	Student weeks (2023) n=291	Student numbers (2022) n=295	Student numbers (2023) n=291	Average length of stay (2023)	Change in student weeks (%) n=278	Change in student numbers (%) n=278
	<b>Overall data</b>					<b>Like-for-like comparison</b>	
Western Europe	327,261	420,950	128,606	198,935	2.1	25.5%	49.2%
Middle East	244,362	265,694	28,145	36,112	7.4	6.5%	27.1%
Asia	125,131	171,104	15,732	40,742	4.2	34.7%	152.1%
Latin America	117,279	161,167	24,777	37,454	4.3	33.7%	46.9%
Eastern Europe	44,863	47,850	14,791	17,842	2.7	5.4%	21.0%
Africa	18,072	16,641	2,988	3,180	5.2	-8.4%	7.0%
North America	1,404	1,449	382	624	2.3	-0.4%	59.6%
Australasia	267	167	45	42	4.0	-37.5%	-6.7%

**Source:** English UK, 2023; n=291 private sector member centres in 2023, n=295 private sector member centres in 2022 (y-o-y changes are based on a sample of 278 providers reporting in both 2022 and 2023 to provide a like-for-like comparison).

All top five regions, accounting for 98% of all student weeks in the private sector, experienced growth compared to 2022.

In 2023, Western Europe proved its position as the leading source region for the private sector. It comprised 39% (compared to 41% in 2019) of all private sector student weeks and 59% of student numbers. This region saw the third-fastest year-on-year growth, with a 26% increase in student weeks and a 49% increase in student numbers. Italy and Spain were pivotal to this growth, contributing significantly (+75,860) to the overall increase of +82,382 student weeks on 2022. Western Europe had the shortest average length of stay in 2023, at 2.1 weeks.

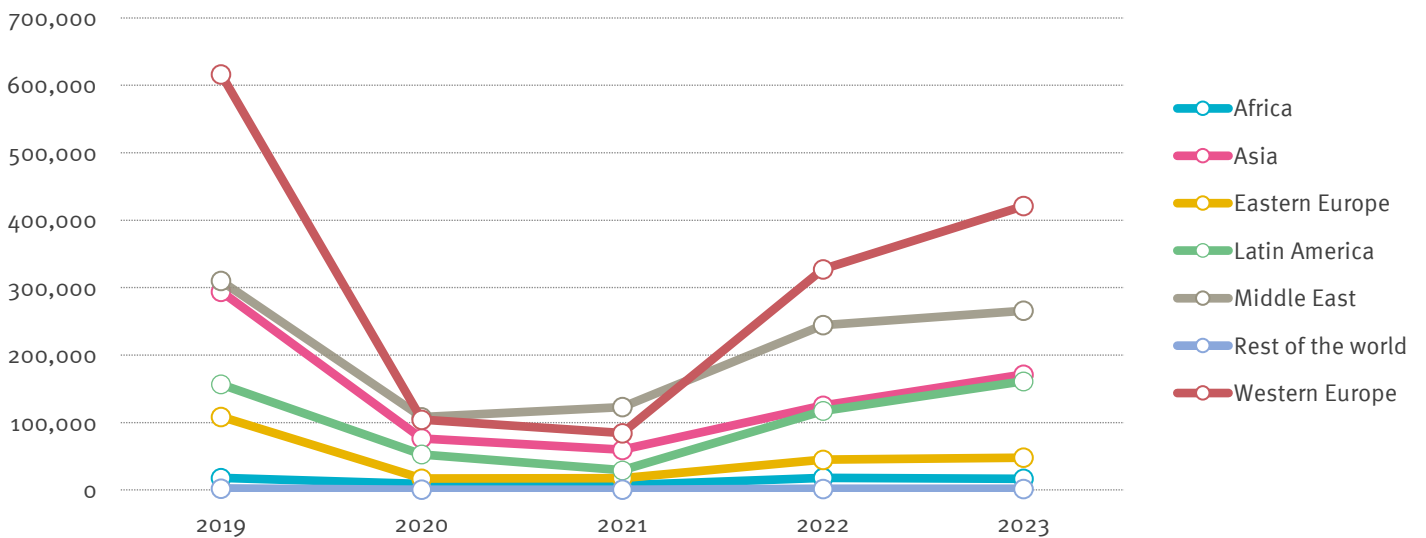
Asia and Latin America exhibited the strongest increases in student weeks compared to 2022, at +35% and +34%, respectively. In the Asian region, China and Taiwan had remarkable growth rates of +121% and +141%, respectively. Together they contributed 63% of the overall increase of +43,262 student weeks from Asia.

Latin America fell just (-9,937 student weeks) behind Asia to rank fourth. In absolute figures, Colombia, Brazil, Argentina, and Peru were the driving forces behind Latin America's growth in 2023, collectively contributing +37,140 student weeks. Stable growth in Latin America resulted in an overall 15% share in 2023 (compared to 10% in 2019).

The Middle East, the second-largest source region in 2023, demonstrated a stable performance and moderate growth, with a 6.5% increase in student weeks. Although its overall share of private sector student weeks declined from 28% in 2022 to 24% in 2023, it remained higher than the pre-pandemic level of 21% in 2019. Students from the Middle East region also recorded the longest length of stay, at 7.4 weeks.

Despite growth in student numbers, both Africa and North America experienced declines in student weeks compared to 2022.

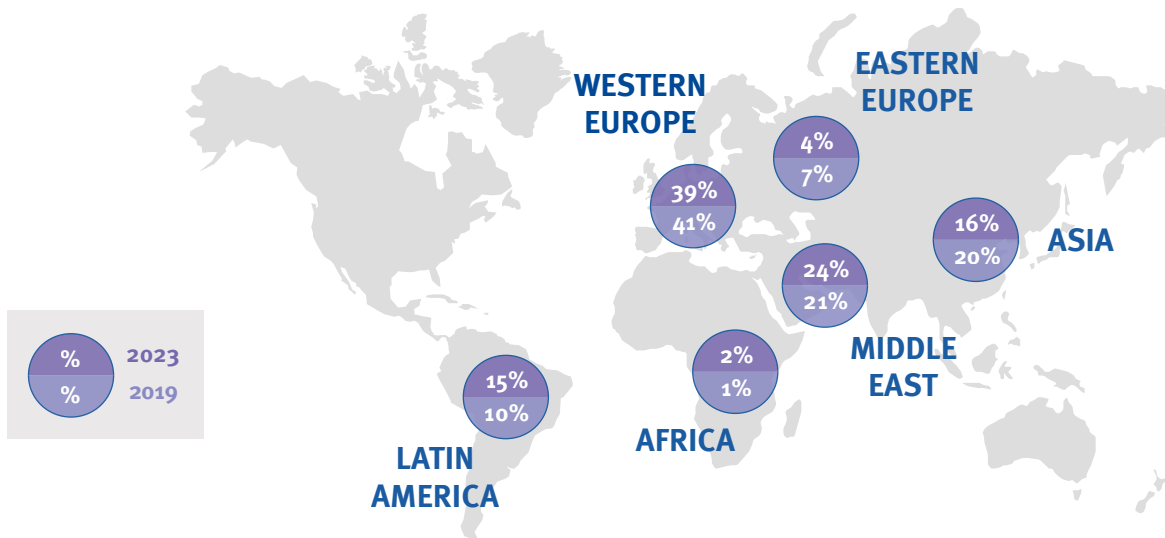
**Chart 23:** Student weeks by source region (2019-2023 private sector)



**Source:** English UK, 2019-2023

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

**Chart 24:** Source region market shares (UK ELT, student weeks at private sector centres, 2019 vs 2023)



**Source:** English UK, in 2023 n=291, in 2019 n=359

**Note:** Based on absolute figures, there was a fluctuation in English UK membership in these years.

## PRIVATE SECTOR MEMBER CENTRES

# SOURCE MARKETS

Seventeen of the top 20 source markets for the private sector registered growth. Italy surpassed Saudi Arabia to become the leading source market, with student weeks (+58%) and student numbers (+79%) rising. In 2023, Italy delivered a total of 170,974 student weeks and sent 88,818 students. Saudi Arabia maintained a similar performance to 2022, achieving

a 2% increase in student weeks. Spain ranked third, with a 27% increase.

Brazil recorded a 29% increase, surpassing France to become a top-four source market for the private sector in 2023. Colombia, Peru, and Uruguay each doubled their student

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

Rank	Country/region	Student weeks (2022) n=295	Student weeks (2023) n=291	Student numbers (2022) n=295	Student numbers (2023) n=291	Average length of stay (2023)	Change in student weeks (%) n=278	Change in student numbers (%) n=278
Overall data						Like-for-like comparison		
1	Italy	107,001	170,974	48,720	88,818	1.9	58.1%	79.0%
2	Saudi Arabia	133,579	138,323	12,754	13,717	10.1	2.0%	7.1%
3	Spain	56,370	73,484	20,902	39,254	1.9	26.5%	82.4%
4	Brazil	44,672	58,979	10,519	15,124	3.9	29.1%	40.7%
5	France	48,214	56,328	16,935	22,532	2.5	7.2%	15.6%
6	Turkey	38,441	56,082	5,883	12,246	4.6	43.5%	104.9%
7	Japan	43,675	46,954	5,297	9,252	5.1	6.5%	72.3%
8	Switzerland	44,661	44,939	10,038	10,374	4.3	0.1%	2.4%
9	Germany	35,151	36,974	17,979	19,943	1.9	4.1%	9.1%
10	China	15,770	36,200	1,737	14,193	2.6	121.3%	670.2%
11	Kuwait	36,013	31,847	3,180	2,846	11.2	-19.1%	-14.6%
12	South Korea	23,158	29,474	2,043	2,889	10.2	26.4%	41.0%
13	Colombia	13,300	28,486	1,300	3,628	7.9	108.0%	170.8%
14	Argentina	15,259	21,870	5,672	8,110	2.7	39.1%	39.3%
15	Thailand	15,898	21,497	1,779	4,610	4.7	32.8%	157.1%
16	Oman	15,328	17,264	1,832	2,026	8.5	14.3%	12.7%
17	Chile	15,317	15,208	2,290	2,562	5.9	-6.1%	1.9%
18	Mexico	13,117	14,835	2,709	3,786	3.9	11.4%	38.1%
19	Taiwan	5,885	14,163	727	3,408	4.2	141.2%	366.4%
20	Ukraine	9,863	9,457	1,697	2,017	4.7	-10.4%	15.1%
21	Poland	8,178	9,117	3,759	4,201	2.2	10.8%	11.2%
22	Austria	5,405	8,202	3,620	6,799	1.2	40.8%	71.6%
23	Israel	6,766	7,636	2,684	3,435	2.2	12.0%	26.7%
24	Russia	7,580	7,613	1,452	1,952	3.9	-0.2%	33.2%
25	Czech Republic	6,548	6,613	3,001	3,284	2.0	5.6%	18.7%

- Overall data** – performance of source markets based on statistics collected from the entire sample (291 in 2023 and 295 in 2022);
- Like-for-like comparison** – y-o-y benchmark based on data from centres reporting in both 2022 and 2023 (278 centres) for a more accurate assessment of source market performance trends.

weeks in 2023, with impressive increases of 108%, 194%, and 118%, respectively. Additionally, Brazil and Argentina showed remarkable growth in absolute figures in 2023. All of these markets surpassed their 2019 performance (over 100% recovery). These developments indicate that Latin America is a promising region for the private sector.

Turkey emerged as the third-largest source market in terms of growth in absolute figures (+16,669 student weeks). It also stands out as a market worthy of attention for the reasons illustrated in the analysis provided under Table 2. The average length of stay for the top 20 source markets in 2023 was 5.1 weeks.

Rank	Country/region	Student weeks (2022) n=295	Student weeks (2023) n=291	Student numbers (2022) n=295	Student numbers (2023) n=291	Average length of stay (2023)	Change in student weeks (%) n=278	Change in student numbers (%) n=278
Overall data						Like-for-like comparison		
26	Peru	2,053	6,411	239	1,192	5.4	193.7%	356.7%
27	Belgium	6,463	6,099	1,591	1,822	3.3	-6.1%	12.8%
28	Portugal	5,281	5,742	2,015	2,414	2.4	7.5%	18.0%
29	Kazakhstan	3,789	4,486	1,213	1,451	3.1	17.5%	19.2%
30	Sweden	4,548	4,361	1,019	888	4.9	-3.7%	-12.5%
31	Libya	2,646	4,189	199	351	11.9	56.3%	74.6%
32	Netherlands	5,145	4,033	1,710	1,390	2.9	-21.7%	-19.0%
33	Ecuador	3,040	3,814	438	739	5.2	23.3%	66.2%
34	Qatar	2,389	3,423	233	239	14.3	42.5%	1.7%
35	Panama	3,678	3,047	220	224	13.6	-17.4%	1.4%
36	Iran	2,712	2,971	267	313	9.5	8.1%	13.6%
37	Greece	1,978	2,953	1,221	1,765	1.7	46.7%	40.5%
38	United Kingdom	2,751	2,917	1,012	1,092	2.7	5.4%	7.2%
39	Other Africa	2,830	2,909	439	429	6.8	-0.1%	-8.7%
40	Hong Kong	2,986	2,880	258	891	3.2	-4.0%	244.3%
41	Romania	2,069	2,842	1,039	1,545	1.8	36.3%	46.6%
42	Uruguay	1,274	2,797	426	955	2.9	118.4%	123.2%
43	Angola	2,788	2,564	205	190	13.5	-4.7%	-2.6%
44	Algeria	4,916	2,488	738	509	4.9	-49.3%	-30.8%
45	United Arab Emirates	2,211	2,362	283	414	5.7	9.7%	54.2%
46	Other Central America	2,133	2,281	287	461	4.9	6.9%	60.1%
47	Vietnam	1,280	2,082	205	549	3.8	56.9%	152.9%
48	Other Asia/Far East	2,310	2,068	302	382	5.4	-10.5%	26.5%
49	Morocco	2,595	2,011	563	790	2.5	-21.2%	53.5%
50	India	1,032	1,962	141	241	8.1	89.2%	68.1%

- Overall data** – performance of source markets based on statistics collected from the entire sample (291 in 2023 and 295 in 2022);
- Like-for-like comparison** – y-o-y benchmark based on data from centres reporting in both 2022 and 2023 (278 centres) for a more accurate assessment of source market performance trends.

## PRIVATE SECTOR MEMBER CENTRES

# SOURCE MARKETS

Rank	Country/region	Student weeks (2022) n=295	Student weeks (2023) n=291	Student numbers (2022) n=295	Student numbers (2023) n=291	Average length of stay (2023)	Change in student weeks (%) n=278	Change in student numbers (%) n=278
				<b>Overall data</b>		<b>Like-for-like comparison</b>		
51	Slovakia	1,481	1,923	580	975	2.0	25.7%	59.3%
52	Pakistan	2,852	1,898	169	163	11.6	-33.5%	-3.6%
53	Venezuela	1,504	1,842	160	255	7.2	21.5%	59.7%
54	Hungary	1,652	1,839	670	795	2.3	9.4%	16.9%
55	Bulgaria	1,507	1,615	419	511	3.2	9.7%	25.8%
56	Albania	1,555	1,549	296	175	8.9	-1.5%	-41.2%
57	Georgia	868	1,532	359	779	2.0	76.1%	119.0%
58	Jordan	1,361	1,385	186	235	5.9	0.7%	24.7%
59	Azerbaijan	930	1,284	438	610	2.1	28.3%	28.8%
60	Yemen	1,079	1,144	81	122	9.4	-4.4%	38.3%
61	Denmark	2,106	1,121	932	521	2.2	-46.7%	-44.1%
62	Tunisia	958	1,098	666	644	1.7	14.0%	-3.8%
63	Serbia	607	954	255	429	2.2	60.6%	68.9%
64	Egypt	702	927	89	134	6.9	25.3%	48.9%
65	Indonesia	866	926	225	260	3.6	6.9%	15.6%
66	Syria	1,302	900	109	109	8.3	-29.7%	3.8%
67	Croatia	639	893	297	449	2.0	45.9%	58.4%
68	Mongolia	413	872	42	110	7.9	111.1%	161.9%
69	Other Western Europe	374	859	194	470	1.8	145.7%	157.1%
70	Paraguay	614	800	121	171	4.7	27.4%	34.7%
71	Uzbekistan	1,388	748	418	289	2.6	-48.7%	-35.3%
72	Bahrain	1,138	734	129	111	6.6	-38.4%	-16.5%
73	Finland	580	699	211	292	2.4	20.5%	38.4%
74	USA	729	687	254	370	1.9	-9.2%	42.5%
75	Iraq	966	658	381	76	8.7	-30.6%	-80.2%
76	Norway	657	649	311	268	2.4	-1.7%	-14.5%
77	Slovenia	650	613	322	311	2.0	-5.8%	-3.7%
78	Cyprus	451	579	52	238	2.4	17.1%	245.1%
79	Armenia	345	570	169	297	1.9	62.9%	75.1%
80	Latvia	398	544	165	204	2.7	38.1%	25.2%
81	Canada	406	489	102	193	2.5	19.8%	89.1%
82	Nigeria	637	455	89	133	3.4	-30.1%	38.2%

- i** • **Overall data** – performance of source markets based on statistics collected from the entire sample (291 in 2023 and 295 in 2022);
- **Like-for-like comparison** – y-o-y benchmark based on data from centres reporting in both 2022 and 2023 (278 centres) for a more accurate assessment of source market performance trends.

Rank	Country/region	Student weeks (2022) n=295	Student weeks (2023) n=291	Student numbers (2022) n=295	Student numbers (2023) n=291	Average length of stay (2023)	Change in student weeks (%) n=278	Change in student numbers (%) n=278
<b>Overall data</b>				<b>Like-for-like comparison</b>				
83	Estonia	539	448	379	391	1.1	-16.9%	3.2%
84	Palestine	246	430	32	149	2.9	91.5%	377.4%
85	Other Middle East	654	353	77	35	10.1	-46.0%	-54.5%
86	Other South America	395	307	82	32	9.6	-23.3%	-62.2%
87	Bolivia	547	300	180	114	2.6	-45.2%	-36.7%
88	Lithuania	276	289	113	107	2.7	4.7%	-5.3%
89	Belarus	202	282	34	82	3.4	33.7%	126.5%
90	Other North America	269	273	26	61	4.5	-6.7%	111.5%
91	Macao	4	263	1	92	2.9	6475.0%	9100.0%
92	Nepal	134	248	14	29	8.6	85.1%	107.1%
93	Moldova	269	205	90	30	6.8	-30.5%	-68.9%
	Tajikistan	534	205	52	15	13.7	-61.6%	-71.2%
95	Costa Rica	376	190	134	101	1.9	-49.5%	-24.6%
96	Turkmenistan	114	189	15	42	4.5	65.8%	180.0%
97	Lebanon	177	182	34	39	4.7	2.8%	14.7%
98	Liechtenstein	108	181	31	153	1.2	63.9%	390.3%
99	Malaysia	190	179	26	31	5.8	-5.8%	19.2%
100	Other East./Centr. Europe	242	177	110	45	3.9	-30.6%	-61.8%
101	Kyrgyzstan	426	163	71	49	3.3	-61.7%	-31.0%
102	Luxembourg	241	162	91	55	2.9	-33.2%	-40.7%
103	Ireland	95	157	24	37	4.2	58.9%	45.8%
104	Cambodia	164	132	11	74	1.8	-19.5%	572.7%
105	Macedonia	37	114	11	25	4.6	208.1%	127.3%
106	Montenegro	45	102	14	40	2.6	126.7%	185.7%
107	Bosnia and Herzegovina	75	82	36	36	2.3	8.0%	-2.8%
108	Australia	70	76	30	31	2.5	8.6%	3.3%
109	Other Australasia	184	75	13	6	12.5	-59.2%	-53.8%
110	Singapore	22	67	6	13	5.2	204.5%	116.7%
111	Philippines	98	62	14	23	2.7	-36.7%	64.3%
112	Iceland	92	61	32	20	3.1	-33.7%	-37.5%
113	Monaco	40	55	18	28	2.0	35.0%	50.0%
114	New Zealand	13	16	2	5	3.2	23.1%	150.0%

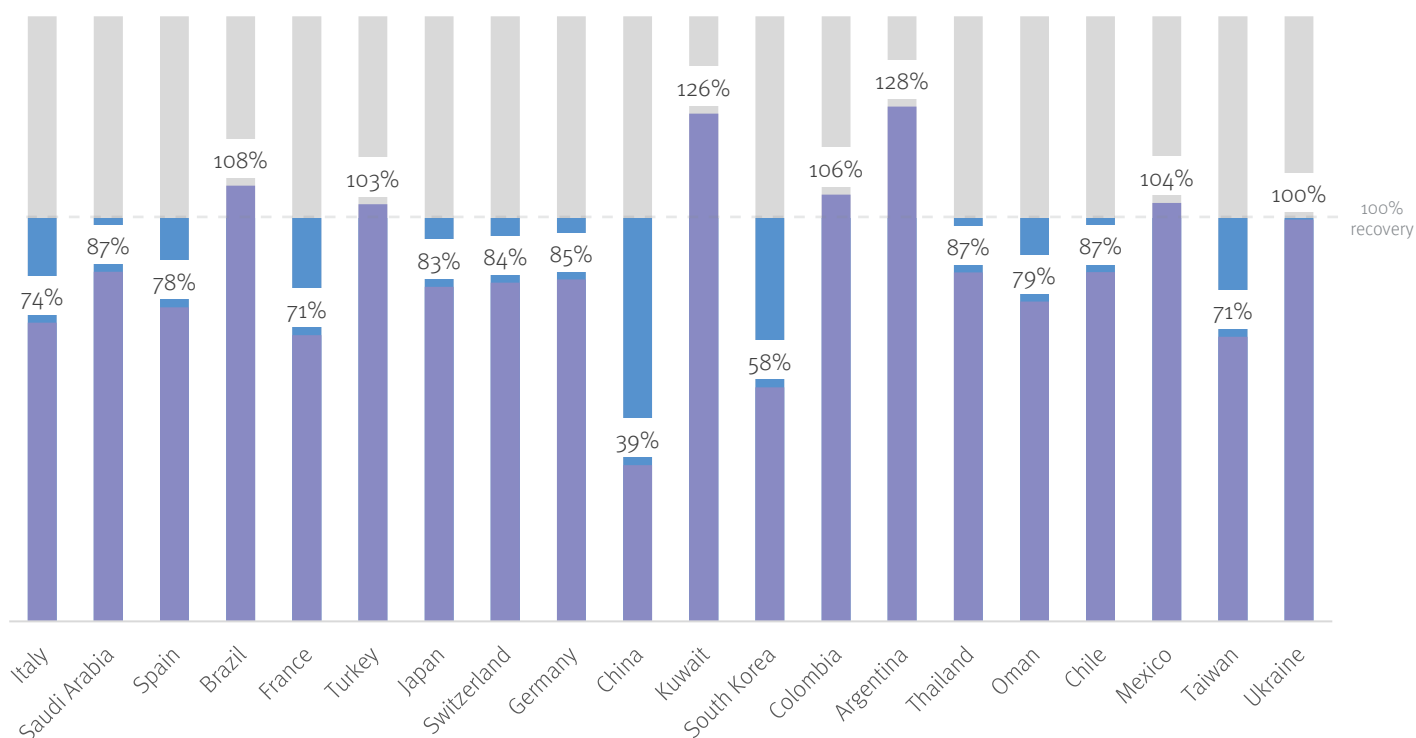
- Overall data** – performance of source markets based on statistics collected from the entire sample (291 in 2023 and 295 in 2022);
- Like-for-like comparison** – y-o-y benchmark based on data from centres reporting in both 2022 and 2023 (278 centres) for a more accurate assessment of source market performance trends.

Source: English UK, 2023

## PRIVATE SECTOR MEMBER CENTRES

# SOURCE MARKETS

**Chart 25:** Top 20 private sector source markets (rank by private student weeks, 2023) and their recovery level (2019 vs 2023 volume)



**Source:** English UK, 2023; n=259

**Note:** The analysis of recovery levels is based on data from state sector centres reporting in both 2019 and 2023 (259 centres) for a more accurate assessment.

### Recovery levels

Across all private sector source markets, the recovery level reached 79% of 2019 student week volume. The average recovery rate for the top 20 source markets was higher (at 88%), with all countries registering a solid performance.

In 2023, Brazil, Turkey, Kuwait, Colombia, Argentina and Mexico all outperformed their pre-pandemic student week volume in the private sector. Outside of these top 20 source markets, Peru (ranked 26<sup>th</sup>) showed particularly impressive growth, achieving a 160% recovery rate, and becoming a promising source of adult students.

On the other hand, China (39%) and South Korea (58%) were the only two source countries with lower-than-average recovery rates.

### UK regions

Saudia Arabia was the top source market for regions 'Central England and Wales', Northern England and 'South West England and The Channel Islands'.

In all the other regions – Eastern England, London, 'Scotland and Northern Ireland' and 'South and South Eastern England' – Italy emerged as the leading source market. Notably, Saudi Arabia ranked second across these regions, except for London, where Brazil claimed the second place, and Saudi Arabia ranked sixth.

**Table 10:** Private sector – top source countries by UK region (student weeks)

Rank	Central England and Wales n=24		Eastern England n=29		London n=68		Northern England n=41	
1	Saudi Arabia	9,830	Italy	14,835	Italy	36,569	Saudi Arabia	48,764
2	Italy	5,031	Saudi Arabia	6,686	Brazil	31,236	Italy	21,736
3	France	4,977	Spain	5,450	Turkey	24,899	Kuwait	19,882
4	Kuwait	3,844	France	4,852	Japan	20,283	Brazil	10,017
5	Spain	2,625	Turkey	4,427	France	15,029	Spain	9,784
6	Japan	2,015	China	3,757	Saudi Arabia	14,913	Colombia	6,235
7	China	1,498	Japan	3,423	South Korea	13,625	Oman	6,126
8	Oman	1,371	Argentina	3,356	China	11,789	France	4,966
9	Qatar	974	Switzerland	3,169	Switzerland	11,523	Turkey	4,675
10	Turkey	856	Brazil	2,890	Colombia	9,897	Switzerland	4,244

Rank	Scotland and Northern Ireland n=13		South and South Eastern England n=69		South West England and The Channel Islands n=47	
1	Italy	26,596	Italy	42,593	Saudi Arabia	25,836
2	Saudi Arabia	3,597	Saudi Arabia	28,697	Italy	23,614
3	Spain	2,692	Spain	27,526	Spain	16,319
4	France	1,596	France	16,705	Switzerland	8,648
5	Switzerland	1,196	Turkey	15,867	Germany	8,639
6	Germany	1,005	Switzerland	15,602	France	8,203
7	Oman	988	Germany	14,988	Oman	5,272
8	Brazil	874	Japan	13,287	Turkey	4,894
9	China	831	China	10,936	Colombia	4,721
10	Kuwait	652	Brazil	10,565	Japan	4,528

**Source:** English UK, 2023; n=291 member centres

**Note:** In order to maintain the confidentiality of individual centre data, some of the regions were merged.

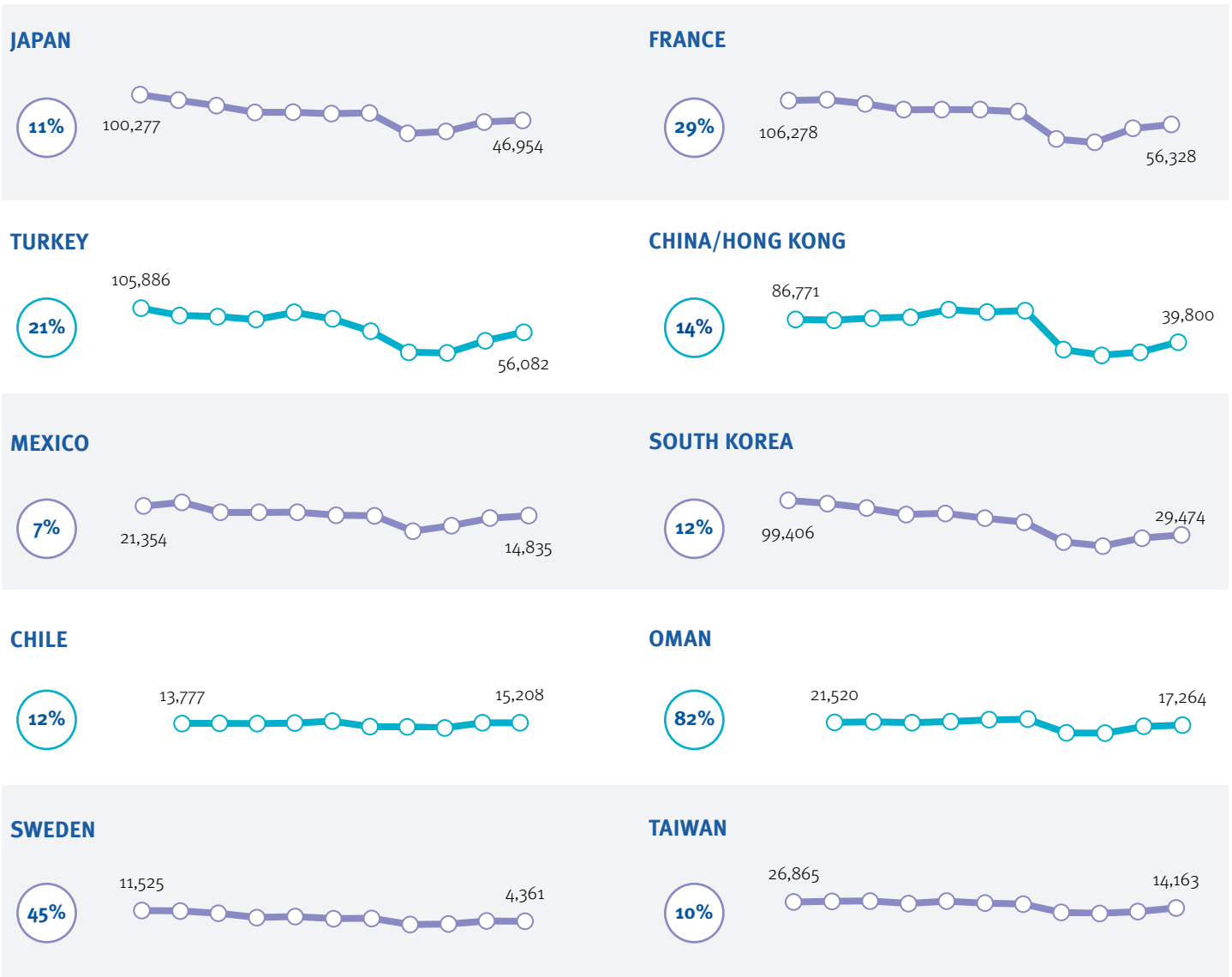
**Note:** For seasonal multi-centres or year-round providers with separate seasonal provision, as annual statistical declarations are made on a membership basis (rather than for each individual teaching premise location) data was attributed according to the location of the headquarters. The results per region might, therefore, be distorted.

# PRIVATE SECTOR MEMBER CENTRES

## SOURCE MARKETS

**Chart 26:** Performance of selected source markets (student weeks, private sector, 2013-2023) and the UK's estimated market share (2022)





**Source:** English UK, 2013-2023, BONARD, 2023

**Note:** Data for 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 3 for more details.

**Note:** Global data for 2023 was unavailable at the time of compilation of this report.

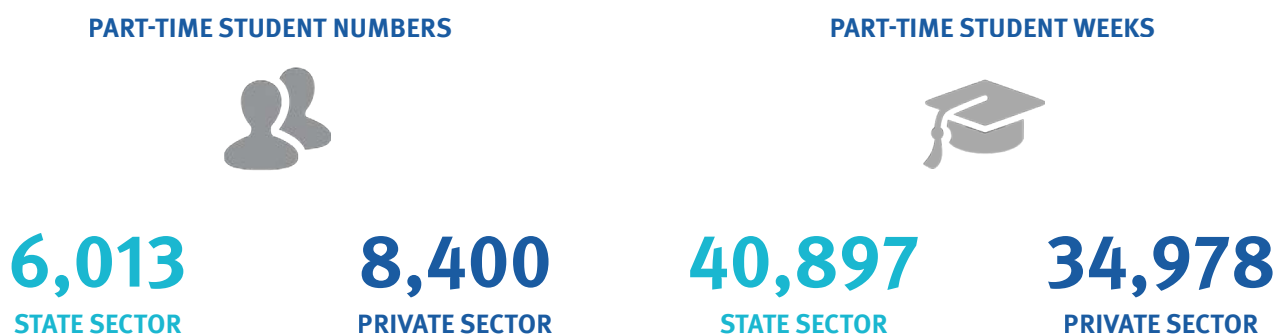
## PART-TIME STUDENTS AT ENGLISH UK MEMBER CENTRES

# MARKET OVERVIEW

This section of the report delves into the statistics concerning part-time students. In the context of this report, the term 'part-time students' refers to international English language students on courses with fewer than 10 taught hours per week.

In 2023, there was a slight increase in the proportion of state sector centres with part-time students (41%, up from 35% in 2022). In the private sector, 67 of 291 member centres (23%, down from 27% in 2022) catered to part-time learners.

**Chart 27:** Part-time student numbers and part-time student weeks taught by English UK member centres

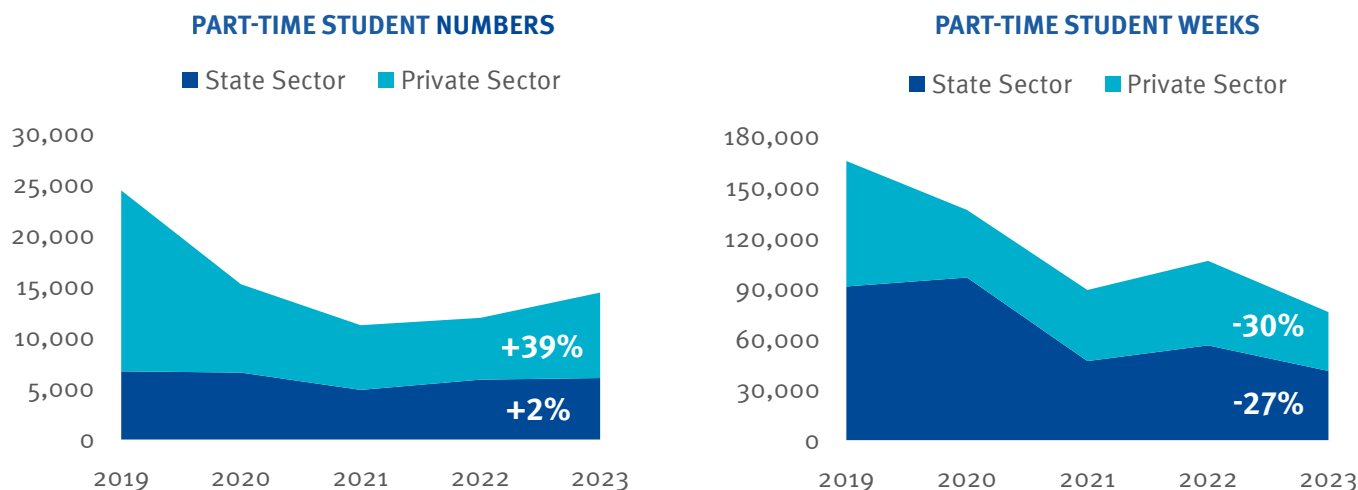


**Source:** English UK, 2023; n=320

Part-time student numbers in the private sector rose by 39%, and a small increase was also seen in the state sector (+2%). Overall, part-time student numbers have been rising for the

past two years. However, part-time student weeks registered a decrease between 2022 and 2023: -30% in the private sector and -27% for state sector providers.

**Chart 28:** Overall number of part-time students (2019-2023) and part-time student weeks (2019-2023) taught by English UK member centres



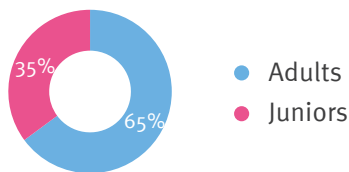
**Source:** English UK, 2019-2023. In 2020, n=99; in 2021, n=101; in 2022, n= 100; in 2023, n= 79.

**Note:** Based on absolute figures, there was a fluctuation in English UK membership in these years.

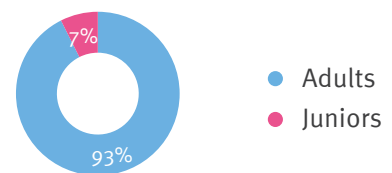
# PART-TIME STUDENTS AT ENGLISH UK MEMBER CENTRES ADULT VS JUNIOR SEGMENT

**Chart 29:** Share of adults and juniors within the total number of part-time students and student weeks in the UK (private and state sector combined)

### PART-TIME STUDENT NUMBERS



### PART-TIME STUDENT WEEKS



**Source:** English UK, 2023; n=79

Sixty-five per cent of the 14,413 total part-time students were adults and 35% juniors. Additionally, adults preferred state sector member centres, while juniors private ones. Across the whole membership, the number of adults studying English language part-time declined by 10%, while junior student numbers saw a significant 231% increase, compared to 2022.

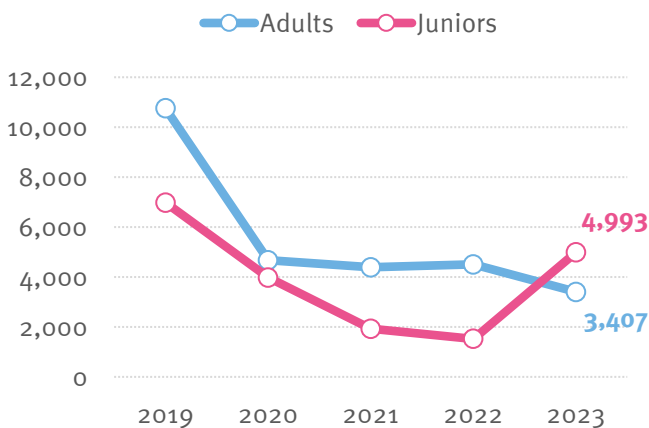
Junior student numbers in the private sector rose by +226%, and this growth was primarily driven by juniors from Western

Europe. On the other hand, adult student numbers declined by 24%. Student weeks decreased for both juniors and adults in the private sector (-32% and -30%, respectively).

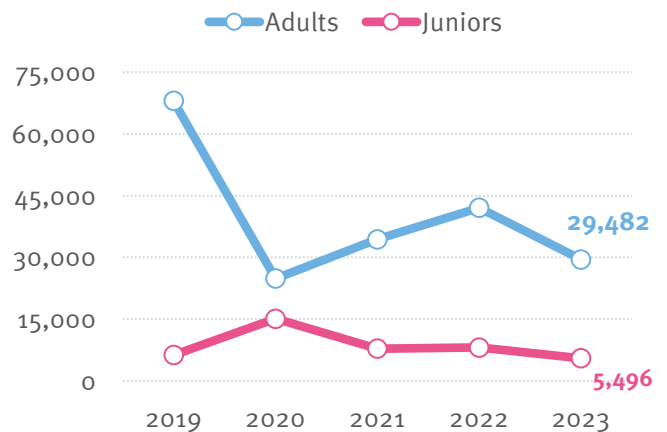
As a result, the average course length for both adult and junior part-time students decreased substantially, to its shortest to date. Compared to 2022, this represented a decrease of 2.0 weeks for adults to 7.5 weeks in 2023, and a steep decline of 4.2 weeks for juniors to 1.1 weeks in 2023.

**Chart 30:** Overall number of part-time adults and juniors (2019-2023) and part-time junior and adult student weeks (2019-2023) taught by English UK member centres (private and state sector combined)

### PART-TIME STUDENT NUMBERS



### PART-TIME STUDENT WEEKS



**Source:** English UK, 2019-2023. In 2020, n=99; in 2021, n=101; in 2022, n= 100; in 2023, n= 79.

**Note:** Based on absolute figures, there was a fluctuation in English UK membership in these years.

## PART-TIME STUDENTS AT ENGLISH UK MEMBER CENTRES

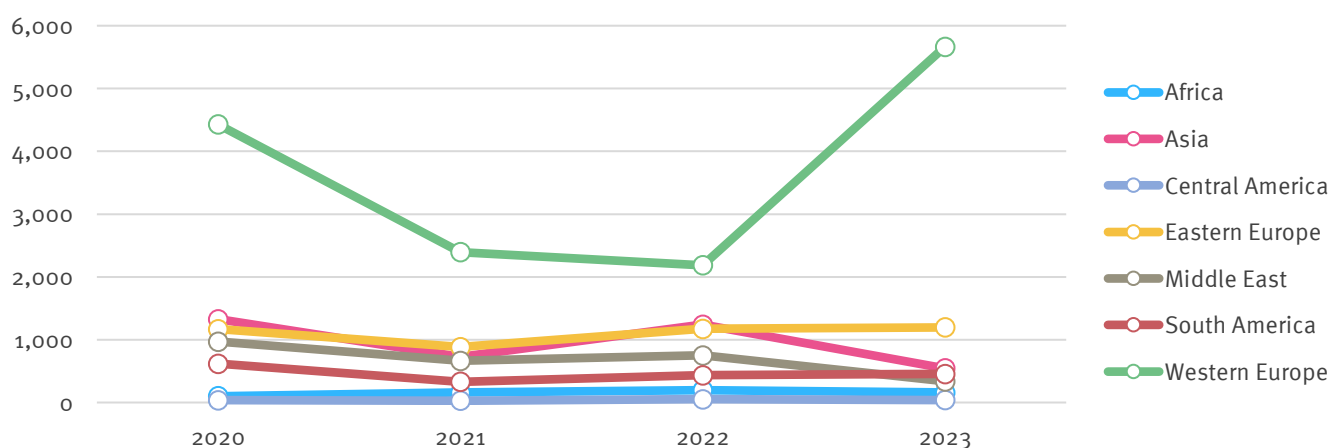
# SOURCE REGIONS

For the private sector, Western Europe retained its position as the top source region (5,665 students), followed by Eastern Europe and Asia. Part-time student numbers from Western Europe saw a significant increase. Eastern Europe and Latin America also saw a small amount of growth, while other

regions declined compared to 2022.

In the state sector, Asia remained the top source region, with 4,432 students, followed by Africa and Eastern Europe. All regions, except the Middle East and Western Europe, grew their student numbers.

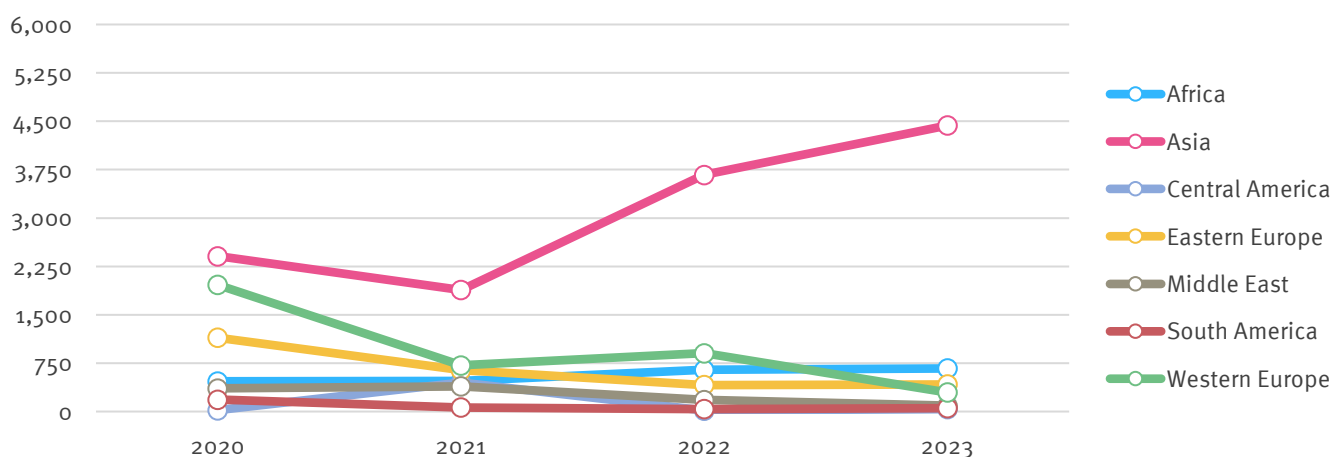
**Chart 31:** Part-time student numbers by source region (2020-2023, private sector centres)



**Source:** English UK, 2020-2023. In 2020, n=77; in 2021, n=83; in 2022, n= 88; in 2023, n=67.

**Note:** Based on absolute figures, there was a fluctuation in English UK membership in these years.

**Chart 32:** Part-time student numbers by source region (2020-2023, state sector centres)



**Source:** English UK, 2020-2023. In 2020, n=22; in 2021, n=18; in 2022, n=12; in 2023, n=12.

**Note:** Based on absolute figures, there was a fluctuation in English UK membership in these years.

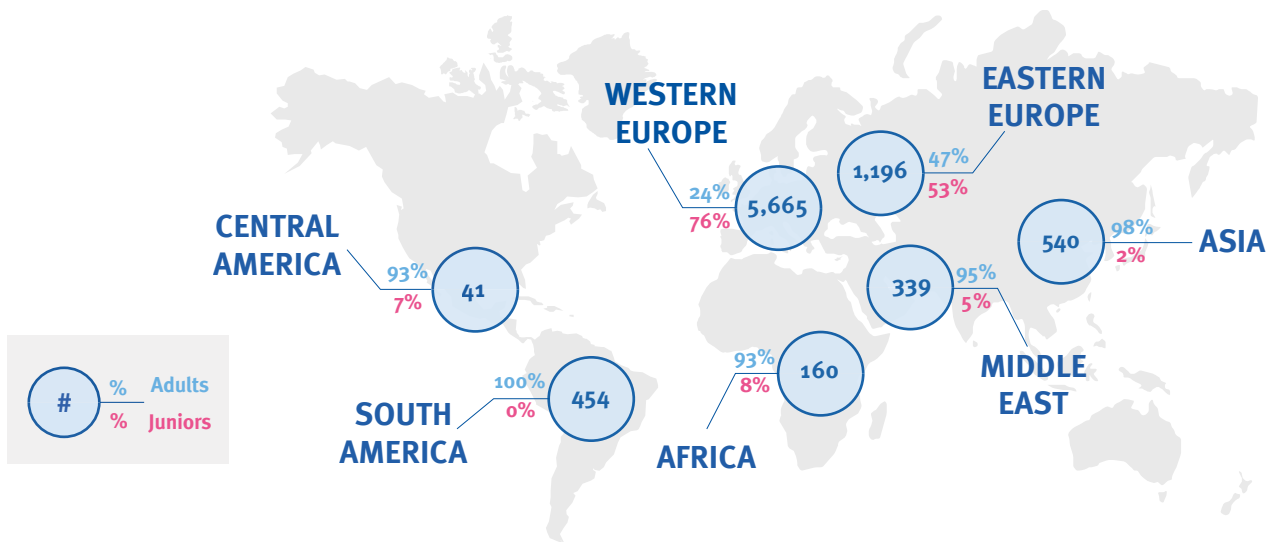
## PART-TIME STUDENTS AT ENGLISH UK MEMBER CENTRES

# SOURCE REGIONS

The majority of part-time learners from Western and Eastern Europe in the private sector were juniors (76% and 53%, respectively). Other regions predominantly comprised adult learners, with all part-timers from Latin America being adult students.

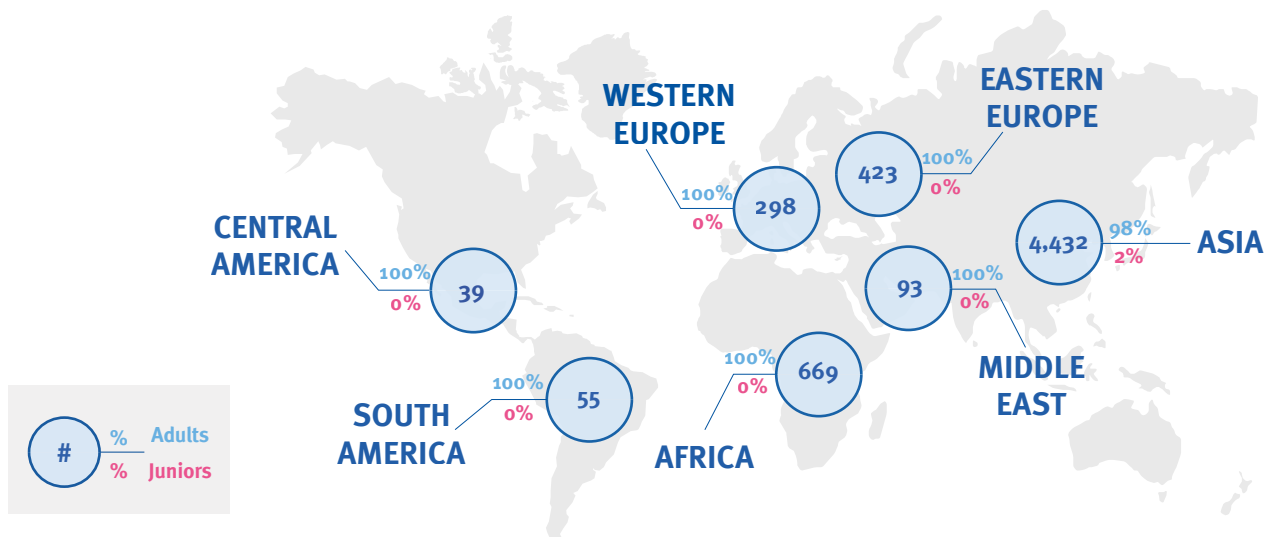
In the state sector, part-time students were predominantly adult. Only a small number of junior students from Asia (2%) studied part-time in the state sector. Notably, the state sector attracted more part-time students from Asia and Africa than the private sector did.

**Chart 33:** Adult to junior ratio (part-time student numbers, private sector centres)



Source: English UK, 2023; n=67

**Chart 34:** Number of part-time students by source region (state sector centres)



Source: English UK, 2023; n=12

## ONLINE STUDENTS AT ENGLISH UK MEMBER CENTRES

# MARKET OVERVIEW

**Chart 35:** Source region overview (online student weeks)

This section of the report presents a new analysis focusing solely on online students. In the context of this report, the term ‘online students’ refers to international English language students studying remotely via online platforms with English UK member centres.

In 2023, 198 full-time online students contributed a total of 6,352 student weeks – 19% in the private sector and 81% in the state sector. Adults constituted 99.9% of all full-time online students.

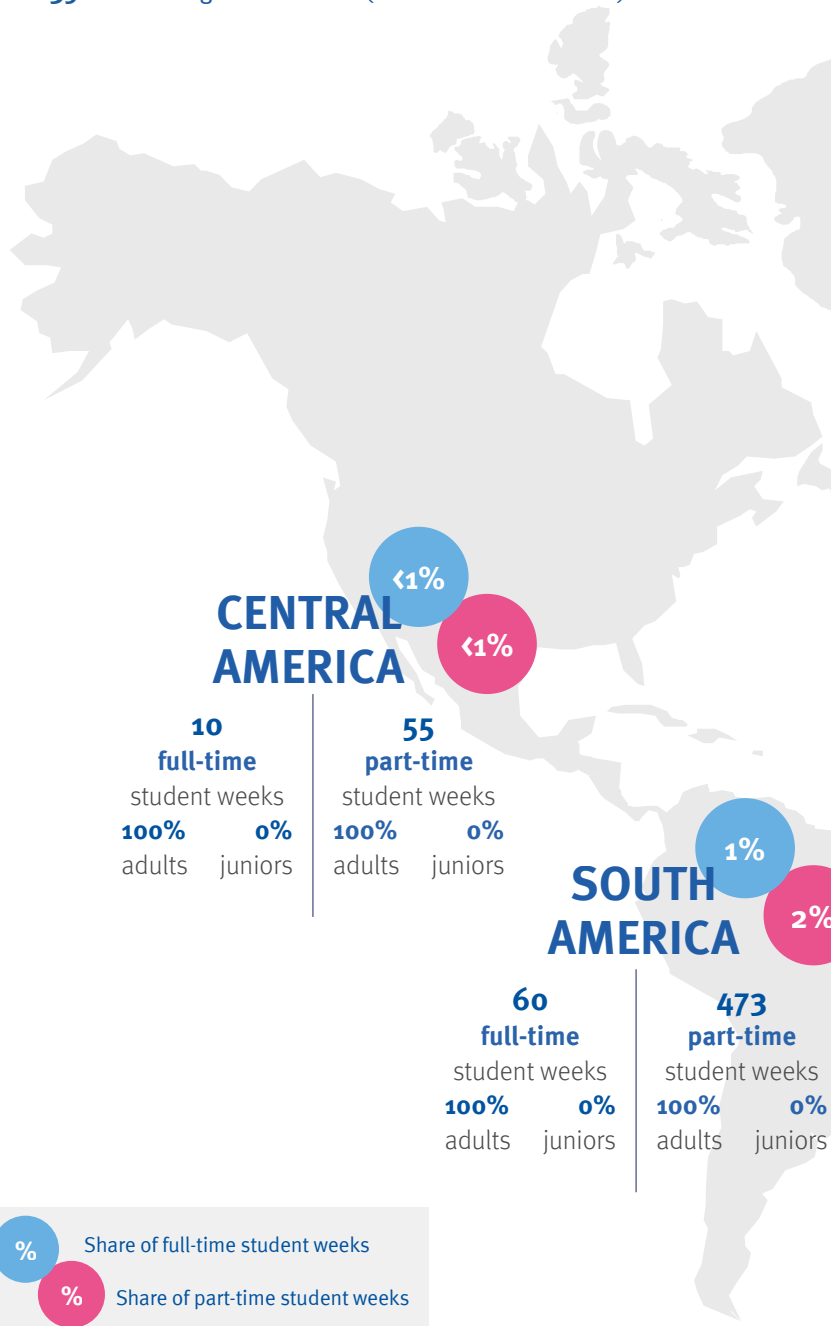
Asia was the leading source region for full-time online students (with 5,161 students). It also accounted for 81% of all full-time online student weeks, followed by the Middle East (10%).

In terms of the UK regional breakdown, institutions in ‘Central England and Wales’ accounted for 72% of the student weeks, followed by London’s 10% share.

Figures show that part-time online study was much more popular than full-time. In 2023, a total of 2,780 part-time students studied for 26,605 student weeks. The adult-to-junior ratio was evenly split at 52% to 48%. The private sector attracted 93% of these student weeks.

The distribution of online student weeks by source region was more evenly spread for part-time students. Asia and Western Europe emerged as the leading source regions, accounting for 37% and 36% of the student weeks, respectively. Eastern Europe followed with a 16% share.

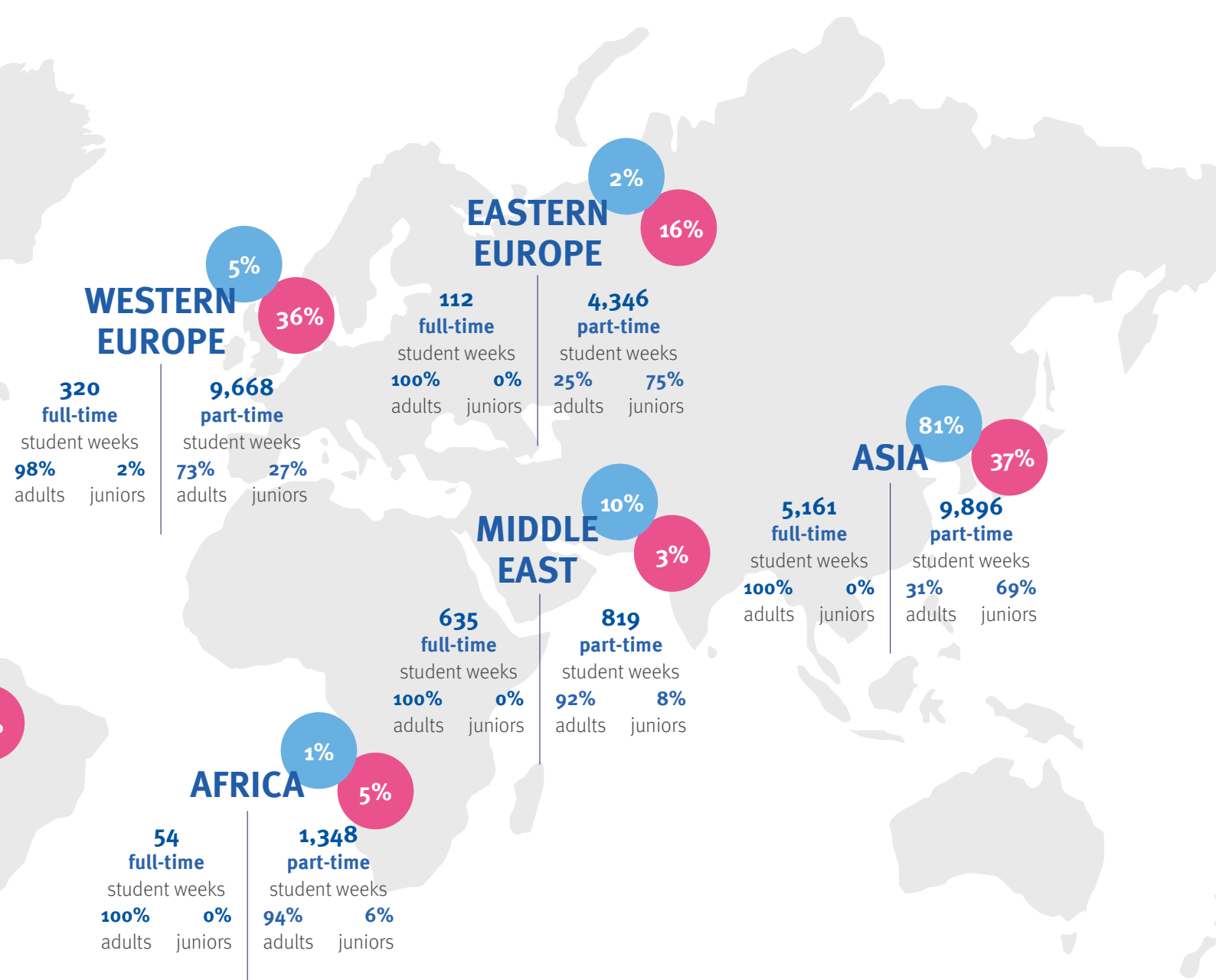
The ‘South West England & Channel Islands’ region taught 46% of all part-time online student weeks. Eastern England followed with a 23% share, and London ranked third with 12%.



**Source:** English UK, 2023; n=47

**Note:** This analysis is based solely on data from member centres that were able to provide the breakdown of their online classes. While some member centres conducted online classes, they were unable to provide the breakdowns, and thus, were not included in the analysis.

**Note:** Percentages may not add up to 100% due to rounding.



# NOTES





Prepared by

**BONARD**