



# Student Statistics Report 2022

ENGLISH LANGUAGE STUDENTS IN THE UK IN 2021

05/2022

Executive summary

# STUDENT STATISTICS REPORT 2022 – EXECUTIVE SUMMARY

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**Prepared on behalf of:**



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# INTRODUCTION

The year began with a strict lockdown and - although QUIC data shows student numbers improving through 2021 - continuing restrictions prevented last summer's hoped-for bounce back.

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

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

# METHODOLOGY

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

Due care and attention were paid to align the annual data as much as possible. Notwithstanding, some of the figures in the report may not be directly comparable for the following reasons:

- The number of state and private sector centres in the English UK membership fluctuates year-on-year (y-o-y). Where appropriate, we have therefore introduced historical comparisons based on the same research sample (only centres reporting in both 2020 and 2021);  
Of the overall English UK membership of 341, two centres were not in a position to supply their annual data and were therefore excluded from the 2021 reporting;
- Not all English UK private and state sector members are able to report more detailed information about their student population, and the sample per student age and country of origin breakdown varies. The actual number of reporting providers is always noted below the respective chart or table;
- Traditionally centres have been asked to report only on courses that take place face-to-face. To understand the impact of the pandemic, exceptionally for 2021, centres were also asked to report on student weeks that had originally been booked as face-to-face courses but due to Covid-19 had to be switched to a different mode of teaching delivery, either during the course itself or prior to course commencement.

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

# ACCESS THE FULL REPORT

English UK members may access the full student statistics report here:

[www.englishuk.com/resources-and-reports/uk-elt-data](http://www.englishuk.com/resources-and-reports/uk-elt-data)

For other stakeholders, media and interested parties, please contact Jodie Gray, Chief Executive, at [Jodie.Gray@englishuk.com](mailto:Jodie.Gray@englishuk.com).

# KEY FINDINGS

## General Overview

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

## State Sector Member Centres

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

## Private Sector Member Centres

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

# OVERALL DATA

## ENGLISH UK MEMBERSHIP OVERVIEW

## MARKET SIZE



339

REPORTING CENTRES

+6

VS 2020



53,616

STUDENTS

-36.3%

VS 2020



462,046

STUDENT WEEKS

-15.0%

VS 2020

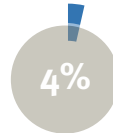
Source: English UK, 2021; year-on-year comparison is based on data from centres reporting in both 2020 and 2021 (n=319)

## AGE SEGMENTS

## MARKET SHARES



OF ALL STUDENTS WERE JUNIORS



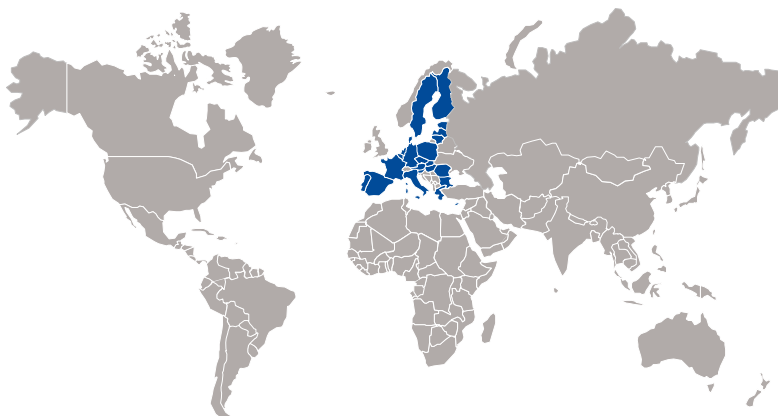
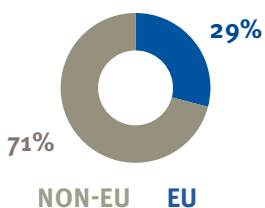
PROPORTION OF STUDENTS WEEKS SPENT BY JUNIORS

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

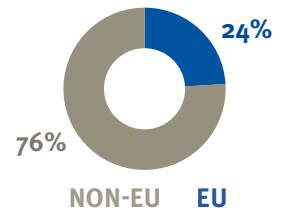
## STUDENT ORIGIN

## MARKET SHARES

STUDENT NUMBERS



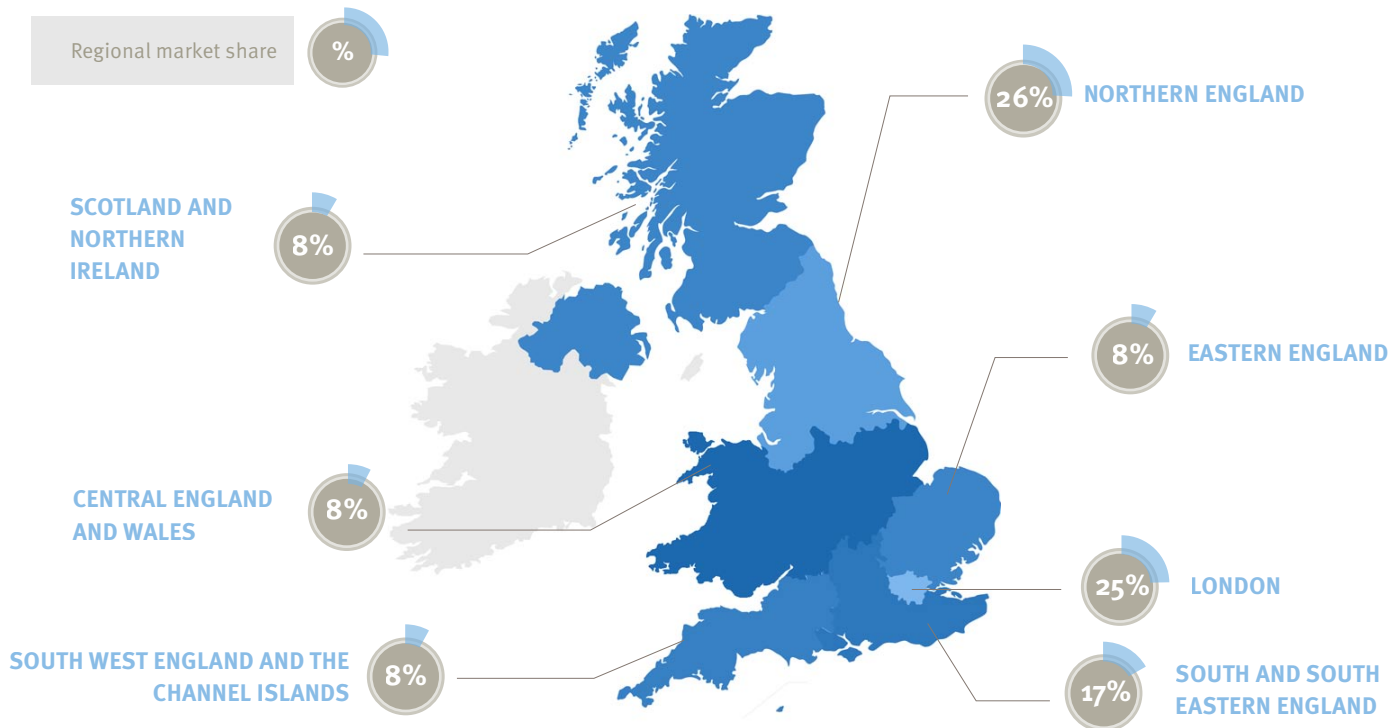
STUDENT WEEKS



Source: English UK, 2021; n=336 member centres

## REGIONAL OVERVIEW

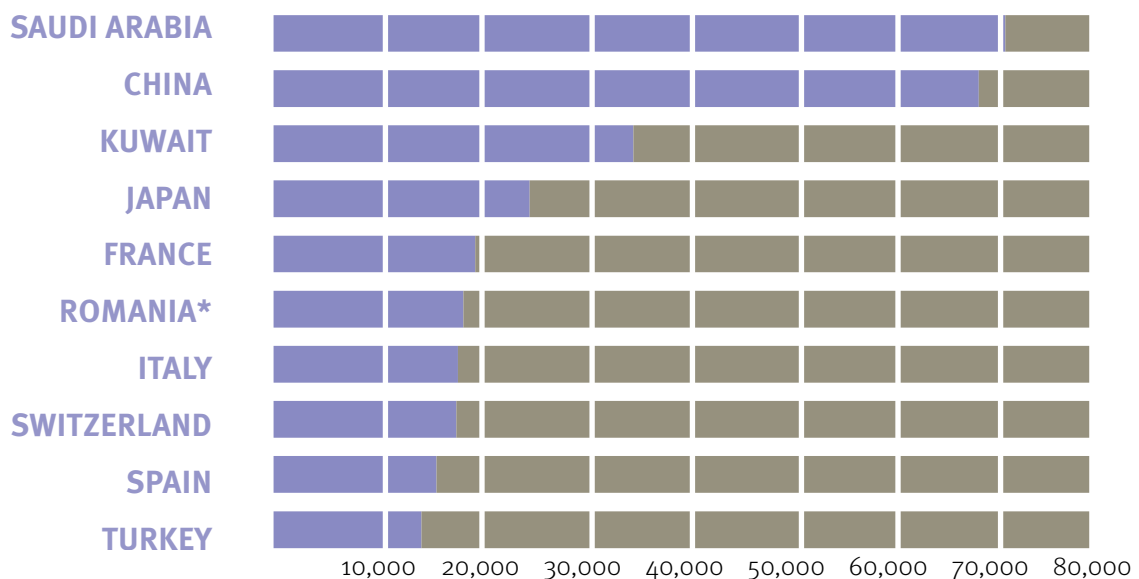
## PERCENTAGE OF TOTAL STUDENT WEEKS



Source: English UK, 2021 n=339 member centres

## TOP SOURCE MARKETS

## STUDENT WEEKS



Source: English UK, 2021 n=336 member centres

\*Note: Please note, that the majority of student weeks from Romania were sourced from a single member institution.

# STATE SECTOR

## STATE SECTOR OVERVIEW

## MARKET SIZE



41

REPORTING CENTRES

-4  
VS 2020



13,011

STUDENTS

-14.0%  
VS 2020



141,085

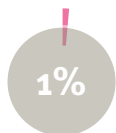
STUDENT WEEKS

-16.8%  
VS 2020

**Source:** English UK, 2021; year-on-year comparison is based on data from centres reporting in both 2020 and 2021 n=37 state sector member centres

## AGE SEGMENTS

## MARKET SHARES



OF ALL  
STUDENTS  
WERE JUNIORS



PROPORTION OF  
STUDENTS WEEKS  
SPENT BY JUNIORS

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

## AVERAGE LENGTH OF STAY

## WEEKS

ADULTS



11.0

JUNIORS

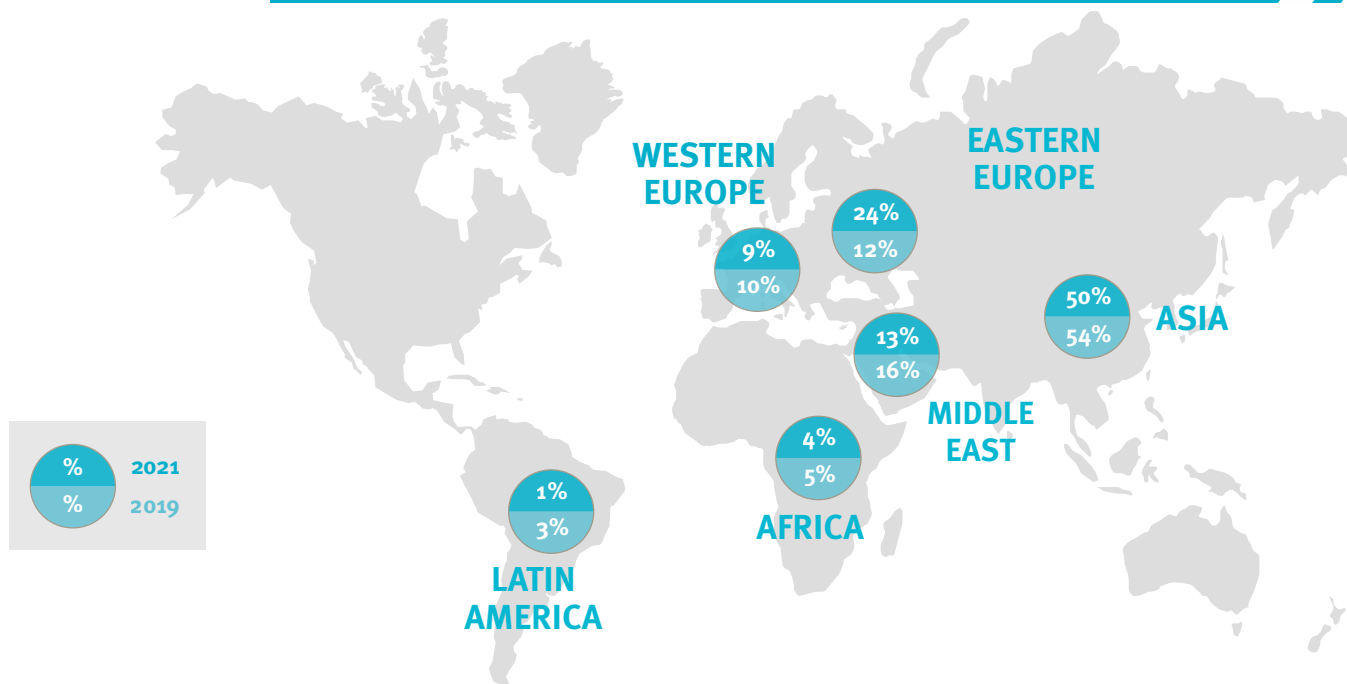


2.3

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

## SOURCE REGIONS

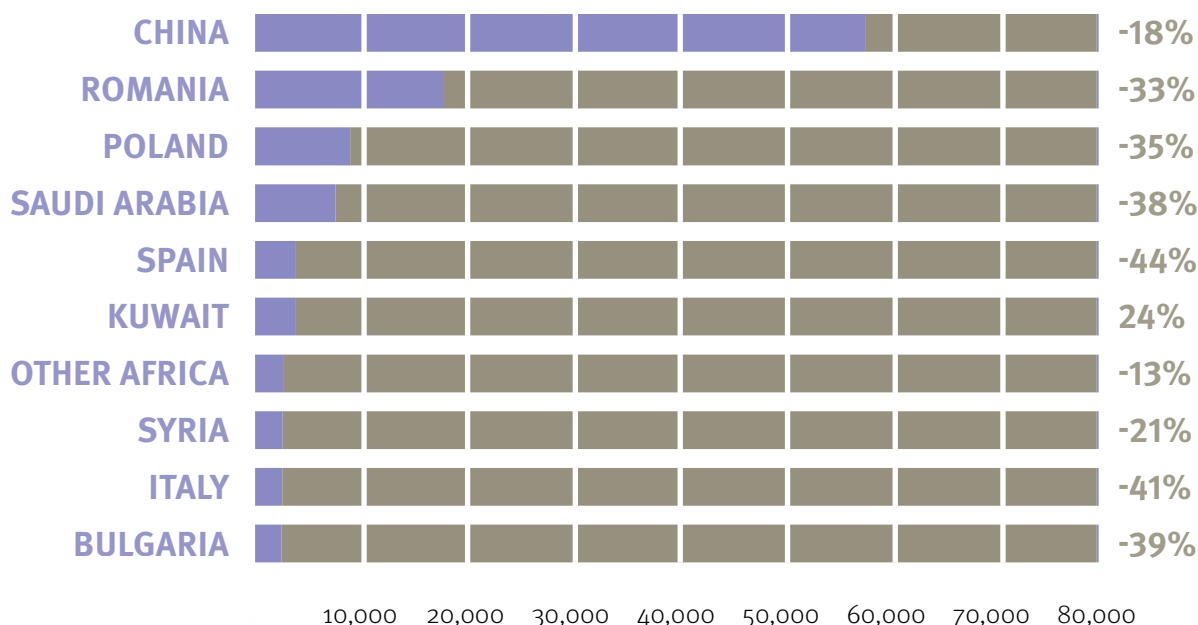
## PERCENTAGE OF TOTAL STUDENT WEEKS



**Source:** English UK, 2021; a comparison of 2019 and 2021 figures does not reflect fluctuation in English UK membership; 2019 n=50 and 2021 n=40 member centres. Percentages do not add up to 100% due to rounding.

## TOP SOURCE MARKETS

## STUDENT WEEKS & YEAR-ON-YEAR CHANGE



**Source:** English UK, 2021; n=40 state sector member centres (y-o-y changes are based on a sample of 34 providers reporting in both 2020 and 2021 to provide a like-for-like comparison).



# PRIVATE SECTOR

## PRIVATE SECTOR OVERVIEW

## MARKET SIZE



298

REPORTING CENTRES

-3

VS 2020



40,605

STUDENTS

-40.8%

VS 2020



320,961

STUDENT WEEKS

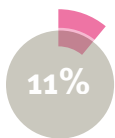
-14.2%

VS 2020

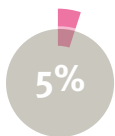
**Source:** English UK, 2021; year-on-year comparison is based on data from centres reporting in both 2020 and 2021 n=282 private sector members

## AGE SEGMENTS

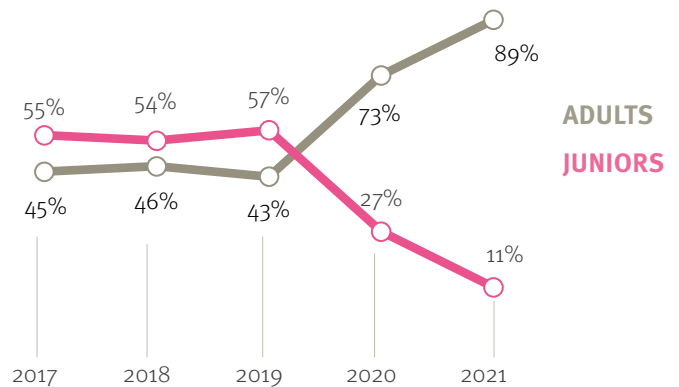
## MARKET SHARES & HISTORIC TREND



OF ALL STUDENTS WERE JUNIORS IN 2021



PROPORTION OF STUDENTS WEEKS SPENT BY JUNIORS IN 2021



**Source:** English UK, 2021; the number of member centres fluctuated over the measured period, ranging between 365 and 298 member centres.

## AVERAGE LENGTH OF STAY

## WEEKS

ADULTS



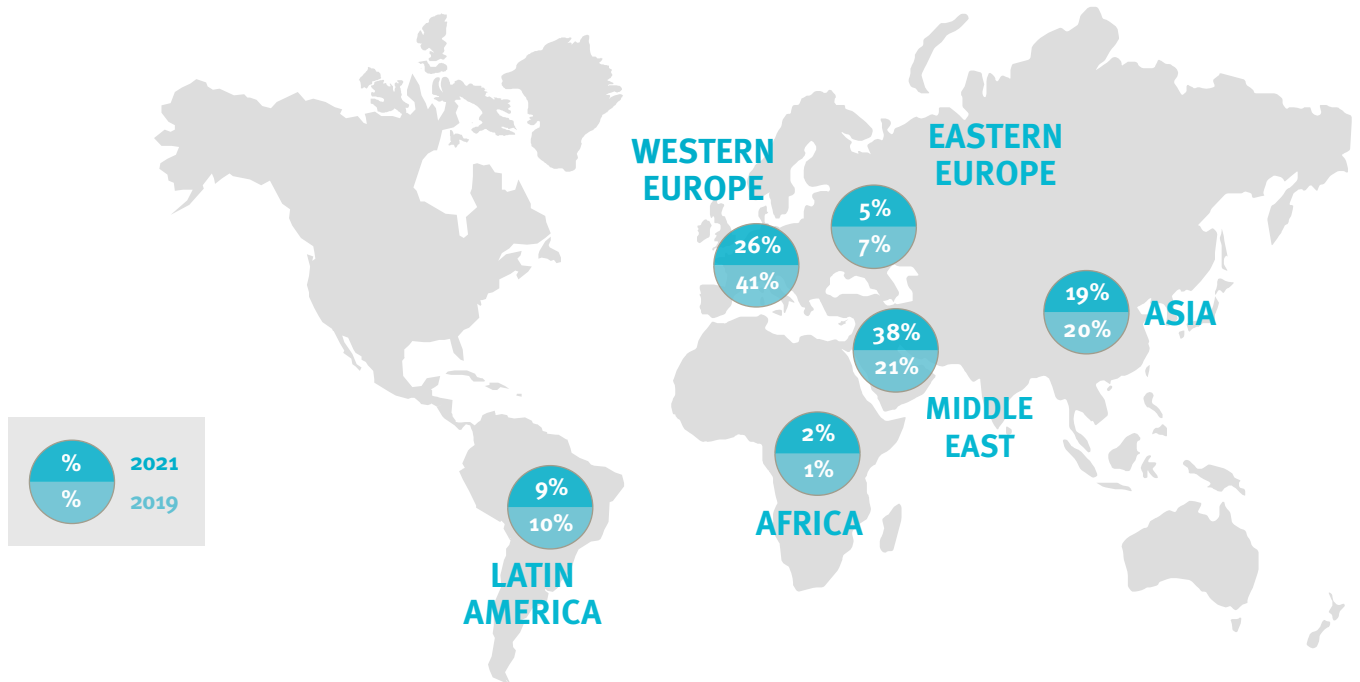
JUNIORS



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

## SOURCE REGIONS

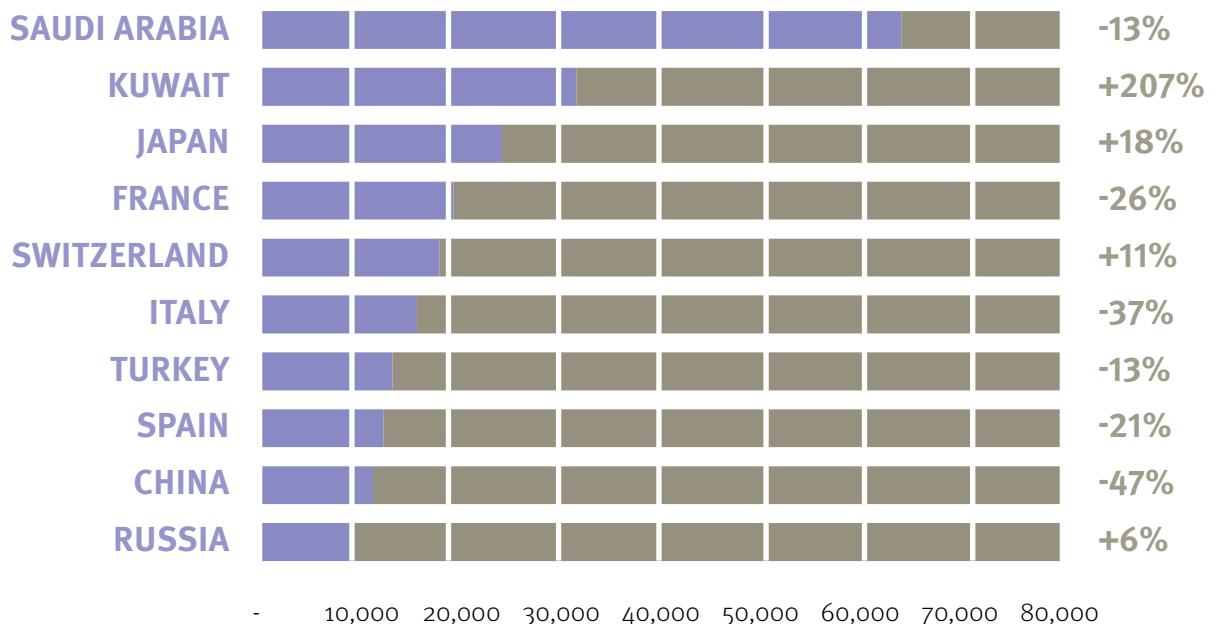
## PERCENTAGE OF TOTAL STUDENT WEEKS



**Source:** English UK, 2021; a comparison of 2019 and 2021 figures does not reflect fluctuation in English UK private sector membership, 2019 n=358 and 2021 n=296 member centres

## TOP SOURCE MARKETS

## STUDENT WEEKS & YEAR-ON-YEAR CHANGE



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

# PART-TIME STUDENTS

In line with English UK's categorisation, part-time students are understood to be international English language students enrolled on courses offering fewer than 10 teacher-taught hours per week.

## PART-TIME OVERVIEW

## MARKET SIZE



339

REPORTING CENTRES



11,206

STUDENTS



89,057

STUDENT WEEKS

## PART-TIME STUDENT NUMBERS



4,881

STATE SECTOR

6,325

PRIVATE SECTOR

## PART-TIME STUDENT WEEKS



46,859

STATE SECTOR

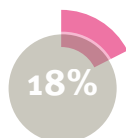
42,198

PRIVATE SECTOR

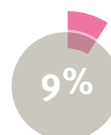
Source: English UK, 2021; n=339 member centres (n=298 private sector members and n=41 state sector members)

## AGE SEGMENTS

## MARKET SHARES



OF ALL PART-TIME STUDENTS WERE JUNIORS



PROPORTION OF PART-TIME STUDENTS WEEKS SPENT BY JUNIORS

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



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