

2024

STUDENT STATISTICS REPORT

English language students in the UK in 2023



BONARD

Executive summary

STUDENT STATISTICS REPORT 2024 – EXECUTIVE SUMMARY

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Prepared on behalf of:



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INTRODUCTION

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.

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.

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.

Jodie Gray, Chief Executive, English UK

METHODOLOGY

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

A descriptive note beneath each chart states the origin of the data.

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

- The number of state and private sector centres in the English UK membership fluctuates year-on-year. Where appropriate, we have therefore introduced historical comparisons based on the same research sample (only centres reporting in both 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.

ACCESS THE FULL REPORT

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

www.englishuk.com/resources-and-reports/uk-elt-data

For other stakeholders, media and interested parties, please contact Roz McGill, Market Development and Insights Manager, at Roz.McGill@englishuk.com.

KEY FINDINGS

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 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. Based on absolute figures, +52% and +19% increases on 2022, respectively. This overall growth was fuelled by the private sector.
- From data from the 307 member centres reporting in both 2022 and 2023, several source markets had fast paced growth: Peru (+188%), Taiwan (+124%), Colombia (+108%), and Italy (+57%).
- 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. Based on absolute figures, this was 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.
- 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.
- 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).
- 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 (based on absolute figures up 55% compared to 2022) and delivered 1,085,022 student weeks (+24%).
- 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).
- Junior students dominated the private sector in 2023, accounting for 61%, up from 51% 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.

OVERALL DATA

ENGLISH UK MEMBERSHIP OVERVIEW

MARKET SIZE



320

REPORTING CENTRES

-9

VS 2022



343,126

STUDENTS

+49%

VS 2022



1,153,868

STUDENT WEEKS

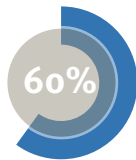
+17%

VS 2022

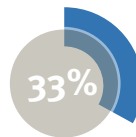
Source: English UK, 2023; year-on-year comparison is based on data from centres reporting in both 2022 and 2023 (n=307)

AGE SEGMENTS

MARKET SHARES



OF ALL STUDENTS WERE JUNIORS



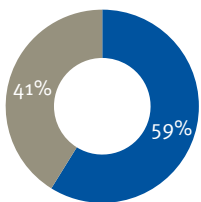
PROPORTION OF STUDENTS WEEKS SPENT BY JUNIORS

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

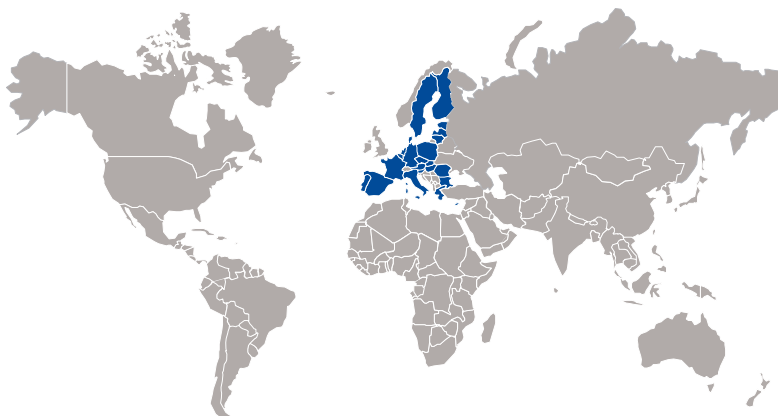
STUDENT ORIGIN

MARKET SHARES

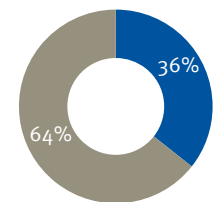
STUDENT NUMBERS



NON-EU EU



STUDENT WEEKS

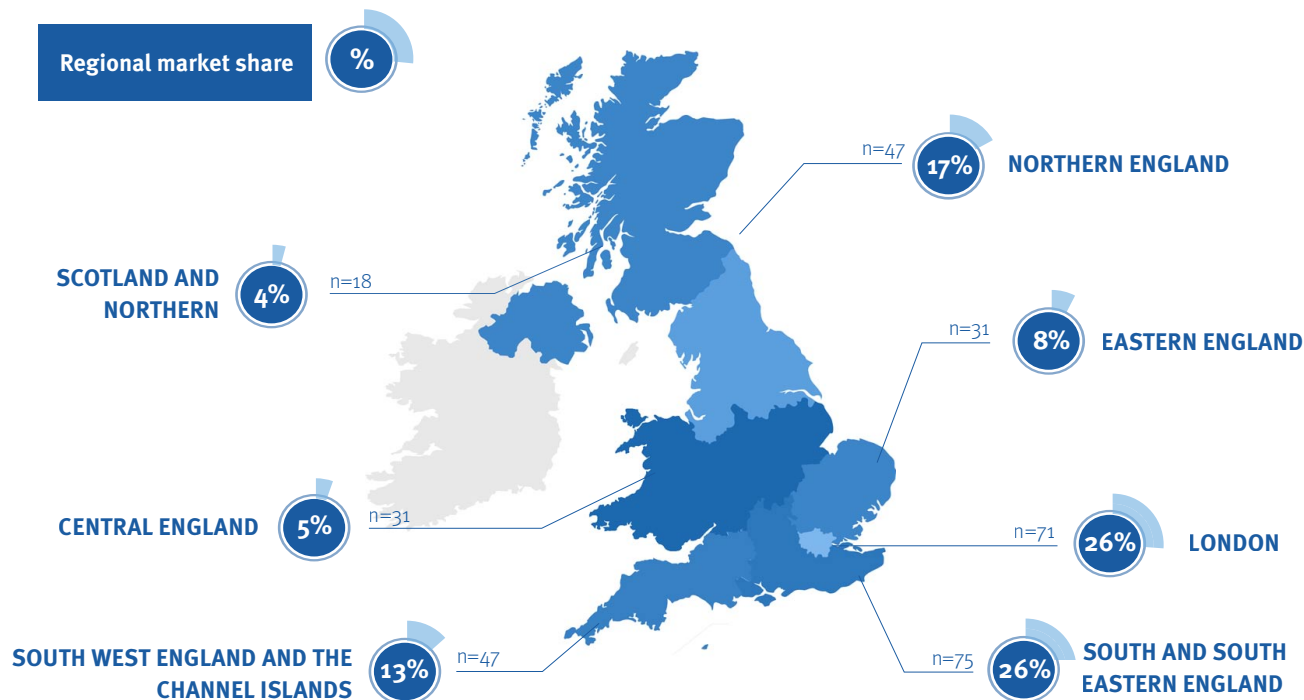


NON-EU EU

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

REGIONAL OVERVIEW

PERCENTAGE OF TOTAL STUDENT WEEKS

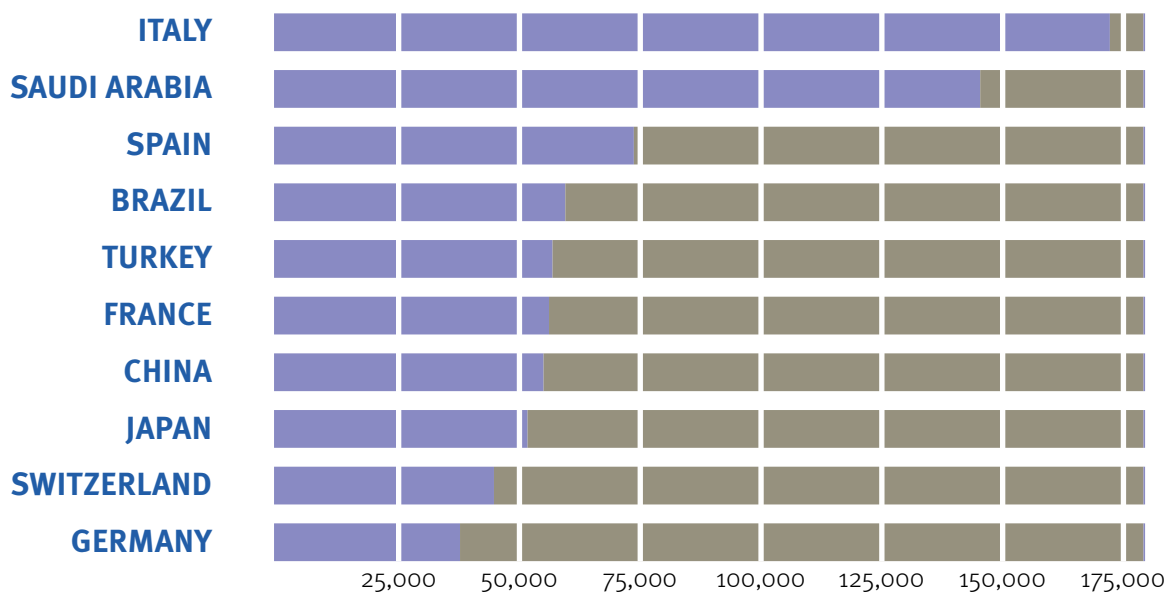


Source: English UK, 2023; n=320 member centres

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

TOP SOURCE MARKETS

STUDENT WEEKS



Source: English UK, 2023 n=320 member centres

STATE SECTOR

STATE SECTOR OVERVIEW

MARKET SIZE



29

REPORTING CENTRES

-5
VS 2022



8,195

STUDENTS

-11%
VS 2022



68,846

STUDENT WEEKS

-19%
VS 2022

Source: English UK, 2023; year-on-year comparison is based on data from centres reporting in both 2022 and 2023
n=29 state sector member centres

AGE SEGMENTS

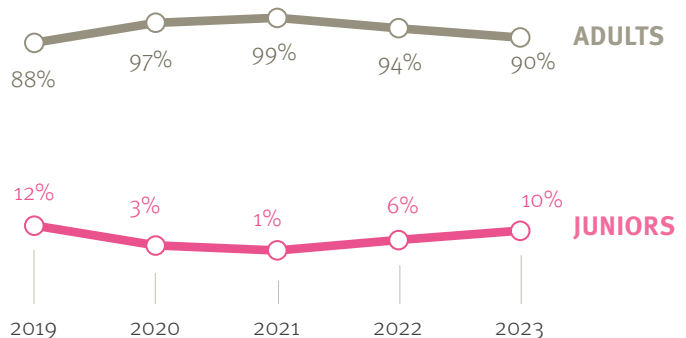
MARKET SHARES & HISTORIC TREND



OF ALL
STUDENTS
WERE JUNIORS
IN 2023



PROPORTION OF
STUDENTS WEEKS
SPENT BY JUNIORS
IN 2023



Source: English UK, 2023; the number of member centres fluctuated over the measured period, ranging between 29 and 54 state sector member centres

AVERAGE LENGTH OF STAY

WEEKS

ADULTS



8.9

JUNIORS

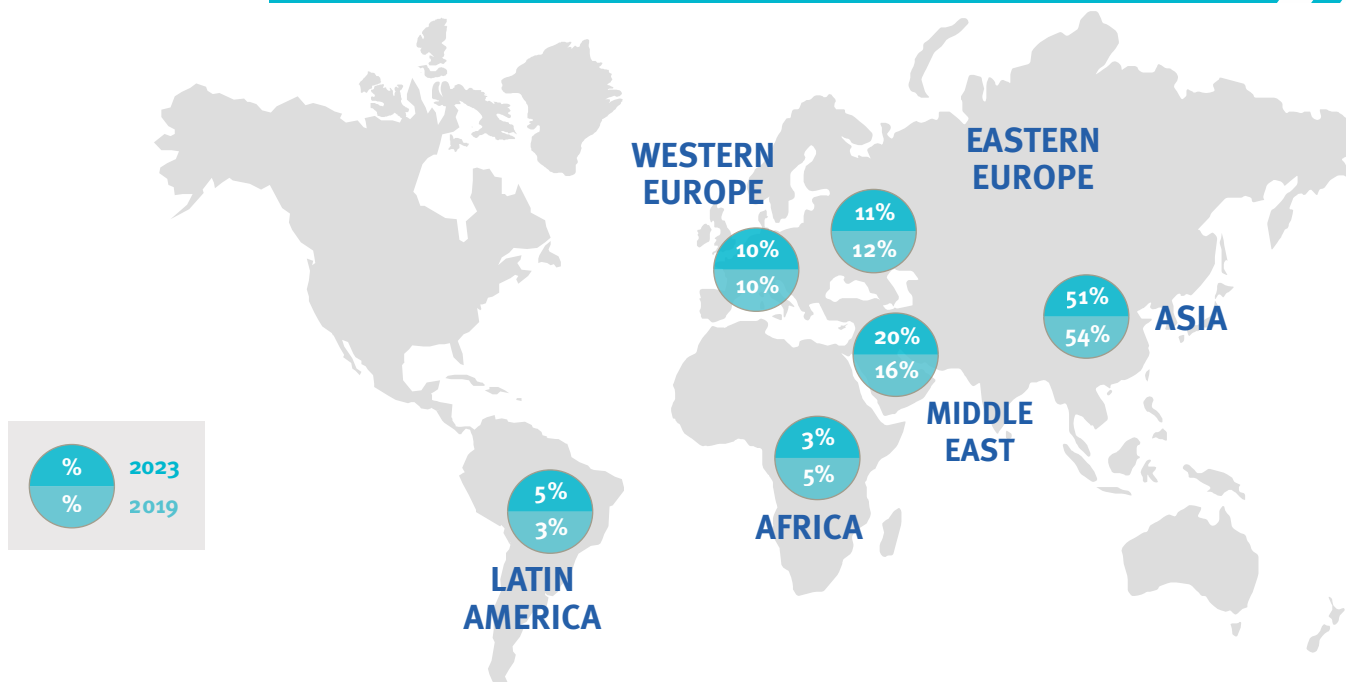


4.1

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

SOURCE REGIONS

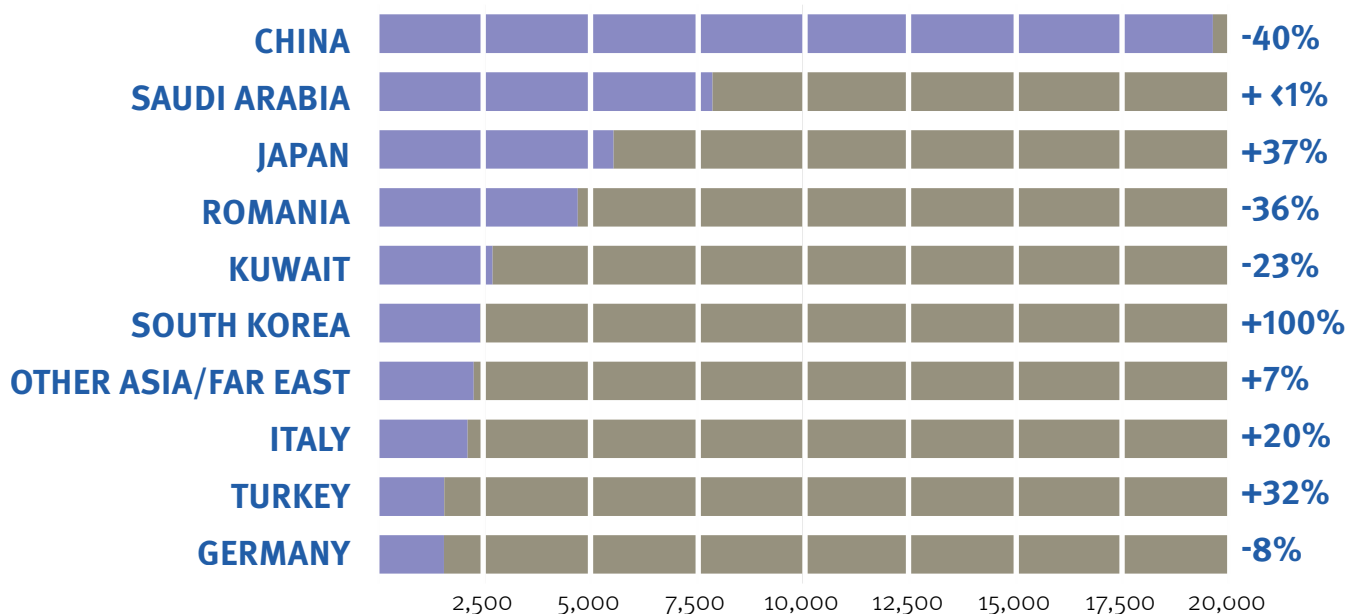
PERCENTAGE OF TOTAL STUDENT WEEKS



Source: English UK, 2023; a comparison of 2019 and 2023 figures does not reflect fluctuation in English UK membership; 2019 n=50 and 2023 n=29 state sector member centres

TOP SOURCE MARKETS

STUDENT WEEKS & YEAR-ON-YEAR CHANGE



Source: English UK, 2023; n=29 state sector member centres (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).

PRIVATE SECTOR

PRIVATE SECTOR OVERVIEW

MARKET SIZE



291

REPORTING CENTRES

-4

VS 2022



334,931

STUDENTS

+51%

VS 2022



1,085,022

STUDENT WEEKS

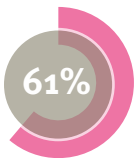
+21%

VS 2022

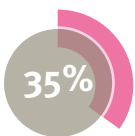
Source: English UK, 2023; year-on-year comparison is based on data from centres reporting in both 2022 and 2023 n=278 private sector member centres

AGE SEGMENTS

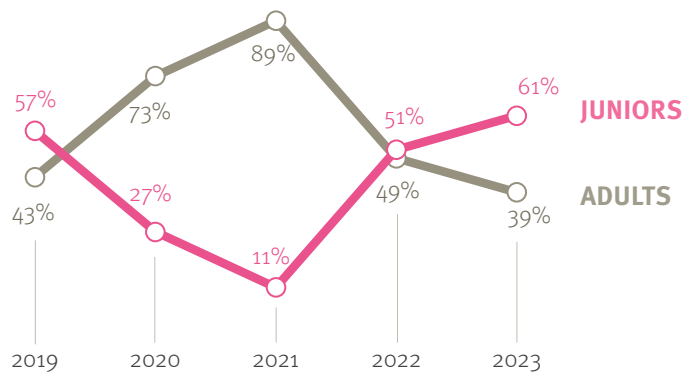
MARKET SHARES & HISTORIC TREND



OF ALL STUDENTS WERE JUNIORS IN 2023



PROPORTION OF STUDENTS WEEKS SPENT BY JUNIORS IN 2023



Source: English UK, 2023; the number of member centres fluctuated over the measured period, ranging between 294 and 359 private sector member centres

AVERAGE LENGTH OF STAY

WEEKS

ADULTS



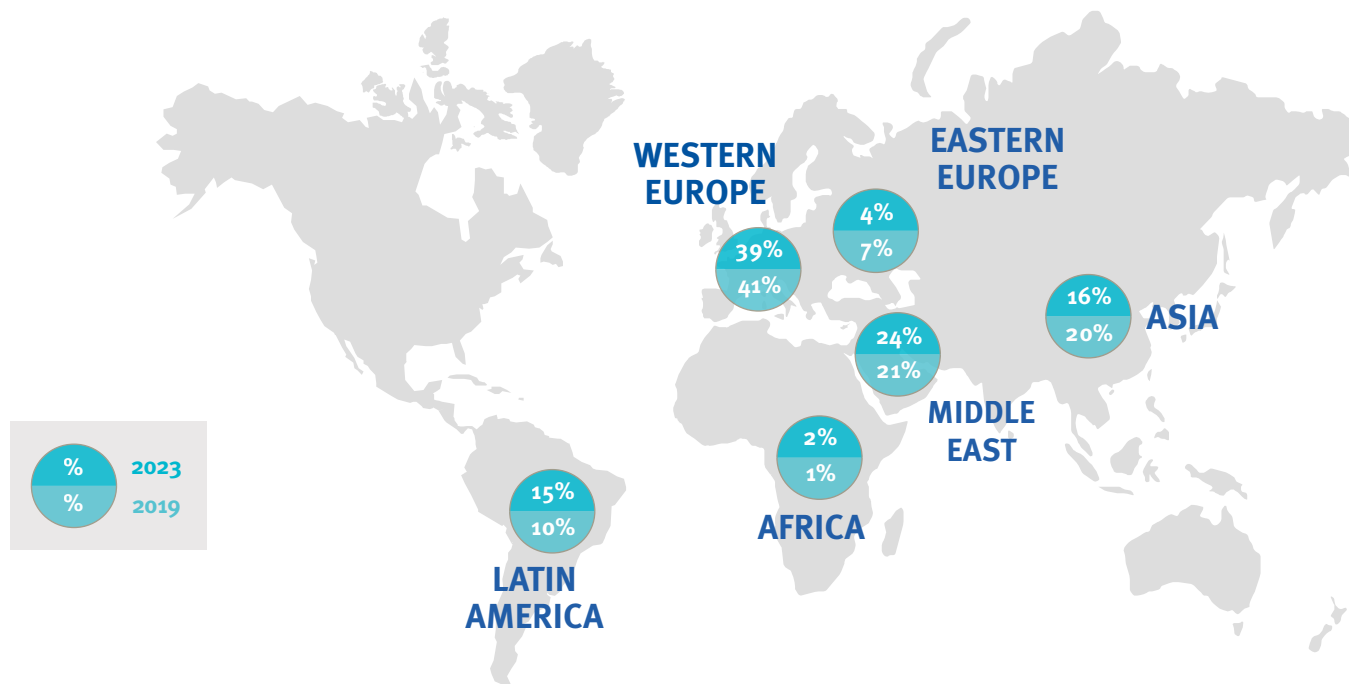
JUNIORS



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

SOURCE REGIONS

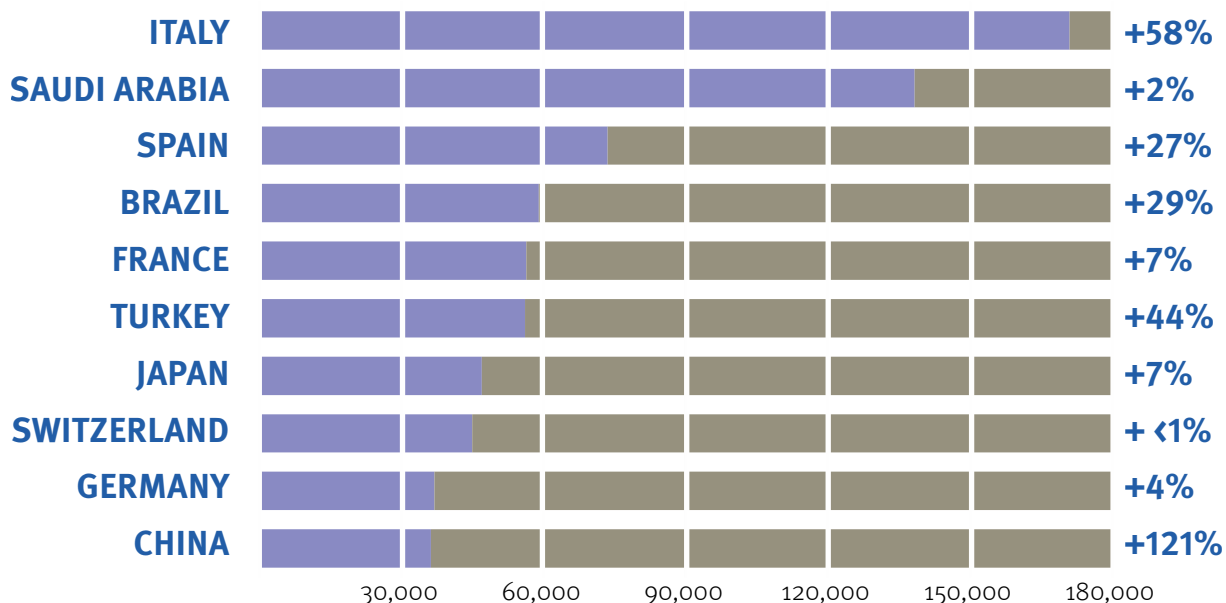
PERCENTAGE OF TOTAL STUDENT WEEKS



Source: English UK, 2023; a comparison of 2019 and 2023 figures does not reflect fluctuation in English UK membership, 2019 n=358 and 2023 n=291 private sector member centres

TOP SOURCE MARKETS

STUDENT WEEKS & YEAR-ON-YEAR CHANGE



Source: English UK, 2023 n=291 private sector member centres (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)

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



320

REPORTING CENTRES



14,413

STUDENTS



75,875

STUDENT WEEKS

PART-TIME STUDENT NUMBERS



6,013

STATE SECTOR

8,400

PRIVATE SECTOR

PART-TIME STUDENT WEEKS



40,897

STATE SECTOR

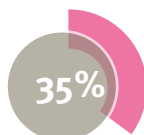
34,978

PRIVATE SECTOR

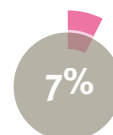
Source: English UK, 2023; n=320 member centres (n=291 private sector members and n=29 state sector members)

AGE SEGMENTS

MARKET SHARES



OF ALL PART-TIME STUDENTS WERE JUNIORS IN 2023



PROPORTION OF PART-TIME STUDENTS WEEKS SPENT BY JUNIORS IN 2023

Source: English UK, 2023; n=79

