Student Statistics Report 2019

ENGLISH LANGUAGE STUDENTS IN THE UK IN 2018

05/2019

englishuk.com

STUDENT STATISTICS REPORT 2019

Prepared on behalf of:

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FOREWORD

Improving the intelligence we provide to members is at the heart of our mission, and so I am delighted to bring you the fifth student statistics report created with our insight partner BONARD.

We constantly make improvements to the scale, scope and detail of the information and analysis this report brings to you, and this year is no different.

After last year's innovation of providing detailed state sector analysis, we are now building on that to bring you trend data and historical analyses which will help member centres seeking to maximise business opportunities.

While the report contains broadly good news for UK ELT, with some building on last year's recovery, there is much for business analysts and members to pore over.

Our private sector members welcomed one per cent more students but saw a simultaneous decline in student weeks. And though overall the state sector saw an upturn in both, 40 per cent of universities and FE colleges experienced declining numbers.

These are issues all our members will want to address in the coming year, supported by not only the wealth of detail provided by this report but also with our quarterly statistics scheme, QUIC.

QUIC gives much more of a real-time snapshot of market shifts and trends and helps centres in membership to benchmark their performance to become the best they can be. We believe QUIC is at present the gold standard of ELT data – particularly used in conjunction with the student statistics report.

As always, it is our aim and aspiration to keep on improving in order to help our members improve. We will be looking at how to take forward our ambitious 2018 data pilot project to create even richer intelligence for the UK's ELT industry, supporting it to succeed against competitor nations in these challenging times.

Sarah Cooper
Chief Executive
English UK

We are pleased to continue our collaboration with English UK on UK's ELT market statistics. Now in our fifth year, we have again looked at ways to further optimise the annual reporting to better inform members' marketing and recruitment activities in the forthcoming period.

This year, we are introducing a number of improvements. Most notably, after years of preparation, we have started to align reporting for state and private sector members as the first trend data is also becoming available for the state sector. In order to offset year-on-year (y-o-y) fluctuations in the research sample, we opted for like-to-like historical comparisons, which provide more meaningful insight into source market performance.

Other enhancements include adjustments in the regional categorisation to mirror international standards and two-tiered data validation.

In terms of market development, 2018 saw a mixed performance from both state and private sector. The findings point to a rejuvenation in the state sector, which performed strongly in both student numbers and student weeks. Growth was uneven, though, with 60% of institutions reporting an increase in number of student weeks whilst the remaining providers saw a decrease over 2017. The private sector experienced a 1% increase in student numbers, thanks to an increase in the adult student population. However, decreasing average course duration brought about a decline in overall student weeks. The downward trend in length of stay seems to be a challenge globally: the UK is not alone in facing it. Tackling this issue might be essential for language schools worldwide going forward.

Additionally, of 114 markets measured, the positive development was driven by 39 source markets for the state sector and 42 for the private sector. This underlines the need for UK ELT centres to be (or become) strategic and highly effective in their international student recruitment activities.

Samuel Vetrak
Chief Executive Officer
BONARD (formerly StudentMarketing)

METHODOLOGY

The core data in this report was collated from English UK annual student data submissions returned between 2008 and 2018.

Each chart contains a descriptive note underneath to state the origin and provenance of its data.

Due care and attention were paid to align the annual data as much as possible. Notwithstanding, 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 y-o-y. Where appropriate, we have therefore introduced historical comparisons based on the same research sample (only centres reporting in both 2017 and 2018).
- Not all English UK 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 state sector providers is always noted below the respective chart or table.

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

EXECUTIVE SUMMARY

General overview

- In 2018, the English UK membership comprised 419 centres, which taught approximately 504,868 students and delivered a total of 1,866,835 student weeks.
- The number of English language learners at English UK member centres rose by 2% while the student week figure recorded a slight drop (0.9%) compared to 2017. This development was partially caused by English UK membership contracting by 15 members.
- While the UK attracted 5% more adult students, the number of students under the age of 18 declined by 1%. Nonetheless, they represent 51% of all enrolments at English UK member centres.
- The study revealed that the highest share of student weeks was spent in the London region despite a decline in its market share from 28% in 2017 to 26% in 2018. The strongest growth was recorded in Northern England (+23,075 weeks, or 9%).
- Markets outside the European Union (EU) generated 63% of all student weeks, and accounted for 43% of students.

State sector member centres

- The state sector welcomed 34,795 English language students who cumulatively spent 308,387 weeks. The figures translated into a considerable y-o-y increase of 10.5% and 11% respectively.
- The share of junior student population increased from 10% in 2017 to 13% in 2018 and represented 3% of the total student weeks at state sector providers.
- The course duration increased from 8.8 weeks to 9.2 weeks, with adult students staying for an average of 10.3 weeks and juniors for 2.1 weeks.
- In 2018, the top five sending markets for the state sector were China (42.8% of total student weeks), Poland (7.8%), Japan (6.9%), Saudi Arabia (6.8%) and Spain (4.1%).
- Based on the data from centres responding in both 2017 and 2018, the top growing markets for the state sector were China (+17,058 weeks), Romania (+2,929) and Poland (+1,528).
- The biggest declines were registered for Taiwan (-1,049 weeks), Panama (-427) and Kazakhstan (-412).

Private sector member centres

- The 360 private sector member centres welcomed 470,073 English language students, which represented a 1% y-o-y growth. At the same time, student weeks dropped by 3% to 1,558,448.
- The under-18 age group comprised 54% of the overall student population at private sector member centres despite facing a 2% dip.
- The average length of stay of an adult student decreased from 5.3 weeks to 5 weeks y-o-y. Juniors stayed for an average of 1.8 weeks (1.9 weeks in 2017).
- The top five source countries in 2018 were Italy (16.2% of total student weeks), Saudi Arabia (9.5%), Spain (7.2%), China (6.1%) and France (5.6%).
- Saudi Arabia (+15,154 weeks), Argentina (+4,776) and Chile (+4,095) represented the leading growth markets.
- The countries with the steepest declines were Italy (-13,355), Turkey (-11,949) and South Korea (-8,087).

GENERAL OVERVIEW

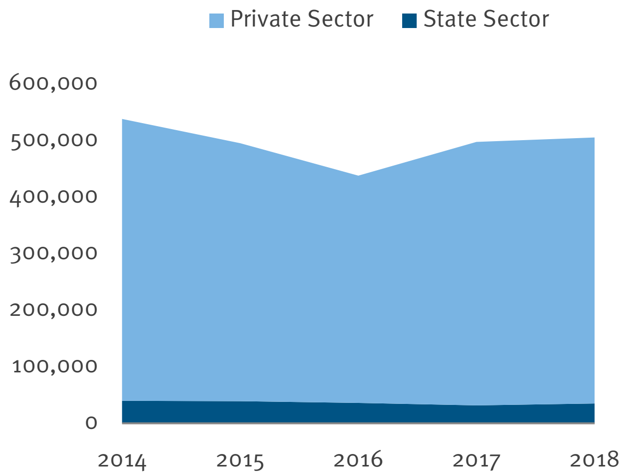
THE UK AT A GLANCE

The 2018 English UK membership was composed of 419 centres, all of which reported their annual student intake data. The overall number of English language students taught by English UK member centres increased by 2% to reach 504,868.

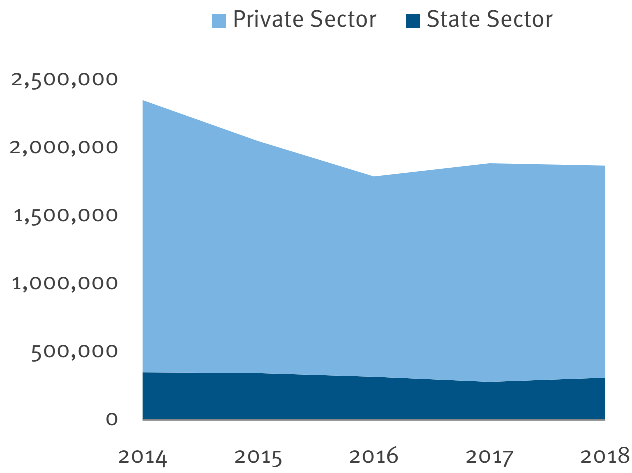
Meanwhile, student weeks dropped by 0.9% to a total of 1,866,835. This decrease can, however, be attributed to English UK membership shrinking by 15 centres between 2017 and 2018 (ten state, five private).

Chart 1: Overall number of students (2014-2018) and student weeks (2014-2018) taught by English UK member centres

STUDENT NUMBERS



STUDENT WEEKS

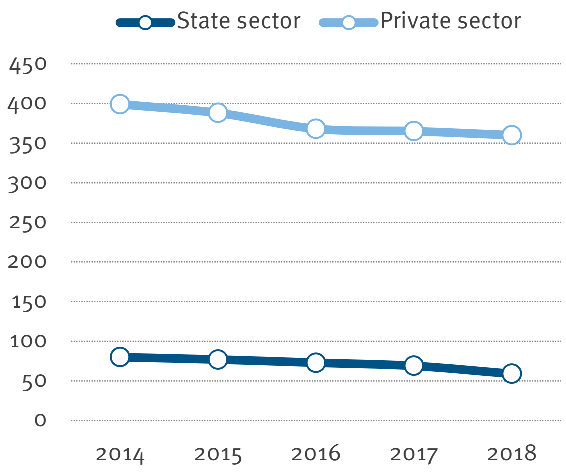


Source: English UK, 2014-2018

The private sector represented 86% of the association's membership and thus also covered predominant market shares: it accounted for 93% of all students and 83% of all student weeks spent at English UK member centres.

2018 brought mixed development to both sectors. While private sector members experienced a 1% increase in student numbers, student weeks dropped by 3%. On the other hand, the state sector expanded by 10.5% and 11% respectively (unadjusted data not taking into account membership fluctuations).

Chart 2: Number of English UK member centres by sector



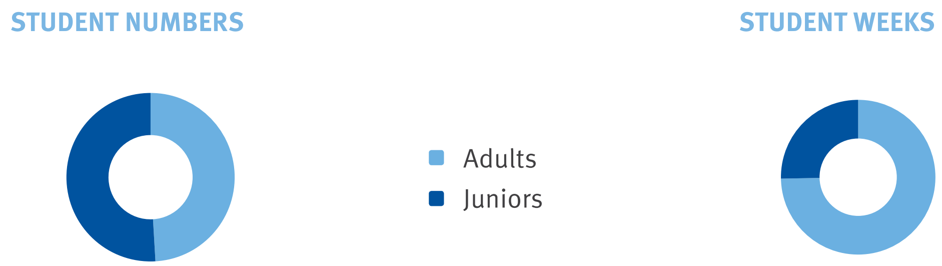
Source: English UK, 2014-2018

As a means to mitigate the impact of the fluctuations in English UK membership, the following historical comparison was based on 403 centres reporting in both 2017 and 2018.

The benchmark points to a minor decline in student weeks and an even steeper increase in student numbers:

	Student numbers	Student weeks
2017 (n=403)	485,310	1,823,232
2018 (n=403)	496,737	1,812,552
Change (%)	+2.4%	-0.6%

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



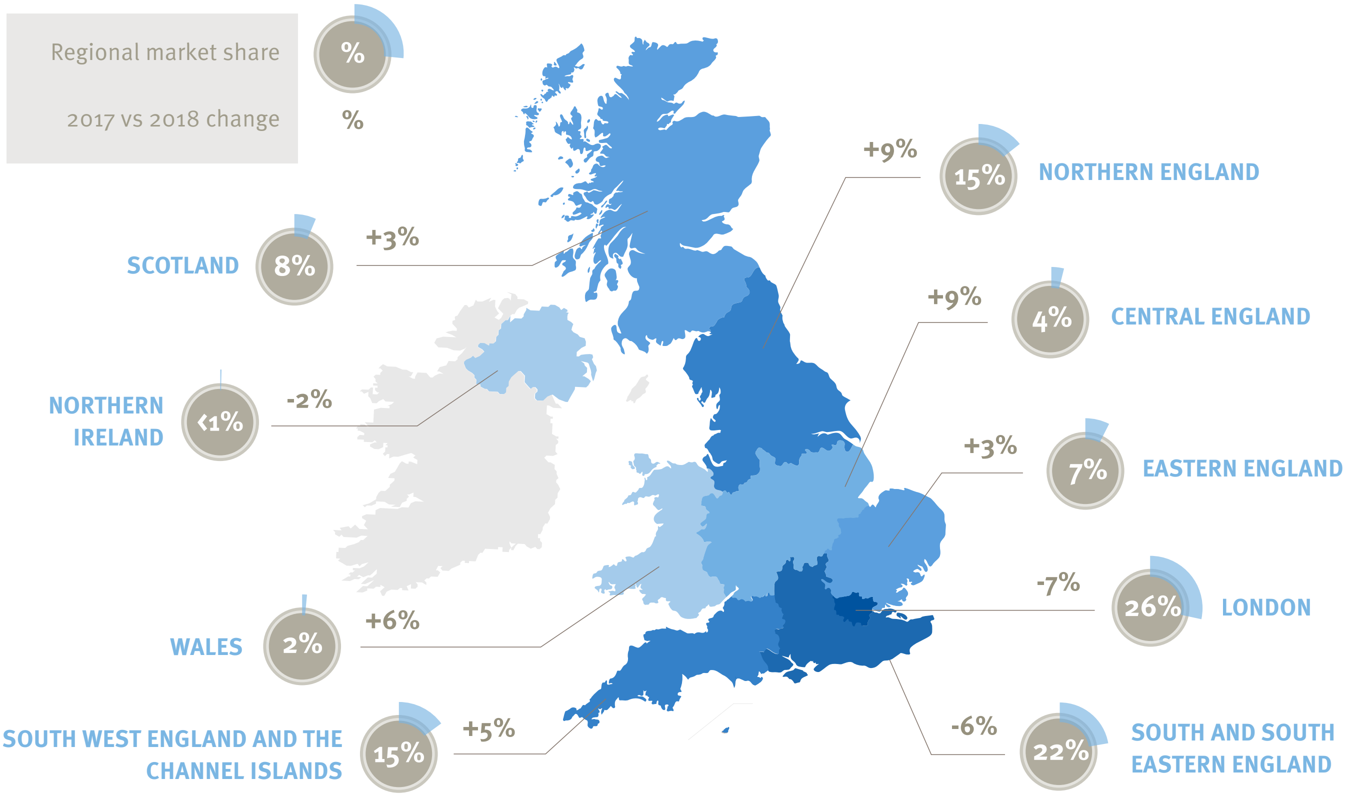
Source: English UK, 2018

Students under the age of 18 represented 51% of the whole student population in the English UK membership. At the same time, they accounted for one quarter of student weeks (25%).

The report later shows that junior students prevailed in the private sector membership (54%), whereas state sector centres were predominantly attended by adult learners (87%).

REGIONAL OVERVIEW

Chart 4: Regional market share (student weeks, 2018) and 2017 vs 2018 change in student weeks



Source: English UK, 2018
Note: Percentages do not add up to 100% due to rounding.

Compared to the previous year, the performance of individual regions varied notably. The two largest regions in terms of market share declined (London and South and South Eastern England). On the other hand, the biggest gainers in 2018 were Northern England and South West England and The Channel Islands (+23,075 and +12,121 weeks respectively). Central England also enjoyed solid growth percentage-wise. Multi-centres, specifically, noticed a 3% y-o-y decline.

Note: In the case of seasonal multi-centres or year-round providers with a separate seasonal provision, data was attributed according to the location of the headquarters. The results per region might, therefore, be distorted. The current methodology represents the most suitable option for multi-centre classification. However, it is planned to categorise each centre separately in future, which should contribute to a more accurate reporting across all data collection platforms.

TOP SOURCE MARKETS

Table 1: Student weeks, students and average length of stay (weeks) by source market (rank by student weeks)

Rank	Country	Student weeks (2017)	Student weeks (2018)	Share (%, 2018)	Student numbers (2017)	Student numbers (2018)	Share (%, 2018)	Average length of stay (2018)
1	Italy	270,131	258,064	14.2%	129,893	127,972	25.4%	2.0
2	China	185,135	204,225	11.3%	44,673	47,372	9.4%	4.3
3	Saudi Arabia	151,041	164,892	9.1%	16,410	18,974	3.8%	8.7
4	Spain	120,187	122,850	6.8%	44,362	46,750	9.3%	2.6
5	France	89,452	89,525	4.9%	35,201	35,812	7.1%	2.5
6	Turkey	100,050	87,072	4.8%	15,270	14,518	2.9%	6.0
7	Japan	79,262	78,568	4.3%	13,579	14,396	2.9%	5.5
8	South Korea	80,849	70,898	3.9%	7,037	7,700	1.5%	9.2
9	Switzerland	75,784	70,501	3.9%	18,148	17,006	3.4%	4.1
10	Brazil	63,320	63,837	3.5%	13,158	13,955	2.8%	4.6
11	Germany	60,789	60,301	3.3%	31,014	31,374	6.2%	1.9
12	Russia	40,400	46,357	2.6%	17,683	17,808	3.5%	2.6
13	Kuwait	36,560	33,234	1.8%	3,529	3,351	0.7%	9.9
14	Poland	25,349	32,489	1.8%	6,646	6,635	1.3%	4.9
15	Colombia	34,039	31,410	1.7%	3,252	3,145	0.6%	10.0
16	Thailand	28,846	30,768	1.7%	4,502	4,975	1.0%	6.2
17	Taiwan	32,655	27,256	1.5%	5,176	4,513	0.9%	6.0
18	Oman	23,629	25,880	1.4%	3,033	3,366	0.7%	7.7
19	Argentina	19,722	24,576	1.4%	5,947	7,883	1.6%	3.1
20	Chile	15,156	19,153	1.1%	2,375	2,940	0.6%	6.5

Source: English UK, 2018; n=412 member centres

Of all student weeks delivered within English UK membership, 85% were produced by the top 20 source countries displayed above. These accounted for 86% of English language students (no change compared to 2017). The list of countries remained largely unchanged when compared to 2017, with the only major change being Chile, which entered the list of top 20 markets at the expense of Mexico.

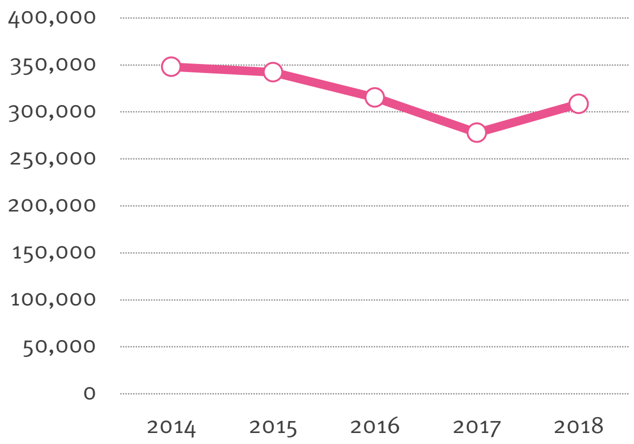
In terms of student numbers, students from EU countries accounted for the majority of English language learners (57%). Of this figure, Italy, Spain, France and Germany alone represented 48%.

At the same time, non-EU students produced 63% of all student weeks. Their average stay was therefore longer (5.3 weeks) than that of EU students (2.3 weeks).

STATE SECTOR MEMBER CENTRES

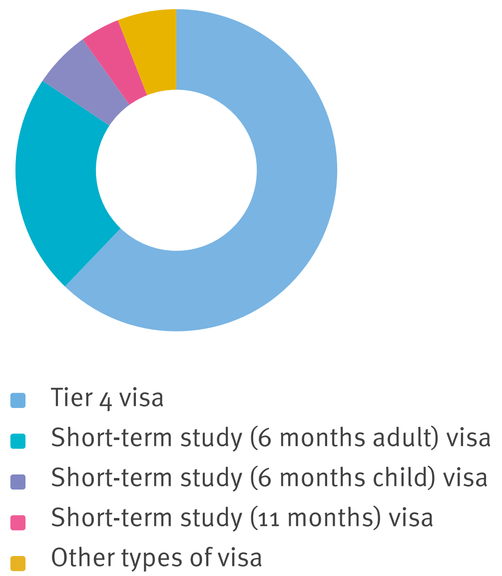
MARKET OVERVIEW

Chart 5: Student weeks taught by English UK state sector members



Source: English UK, 2014-2018

Chart 6: Student numbers by visa type (state sector)



Source: English UK, 2018

In 2018, 27 Higher Education (HE) and 32 Further Education (FE) centres enrolled 34,795 English language students. The state sector thus represented a 7% share in terms of the total number of students attending English language classes at English UK centres. This represented a 10.5% increase in student numbers.

The number of student weeks increased by 11% over 2017 – from 277,888 to 308,387 – which translated into a 17% share of all those spent at English UK centres. The growth was uneven, however; specifically, 60% of institutions delivered more student weeks, whilst the remaining providers saw a decrease over 2017.

A comparison of members reporting in both 2017 and 2018 resulted in the following benchmarks:

	Student numbers	Student weeks
2017 (n=56)	28,474	265,273
2018 (n=56)	32,799	280,222
Change (%)	+15.2%	+5.6%

Tier 4 visa students still account for the majority of student visa holders in the state sector, although their share dropped from 71% in 2017 to 62% in 2018. Adults on short-term study visas represented 22% of the market.

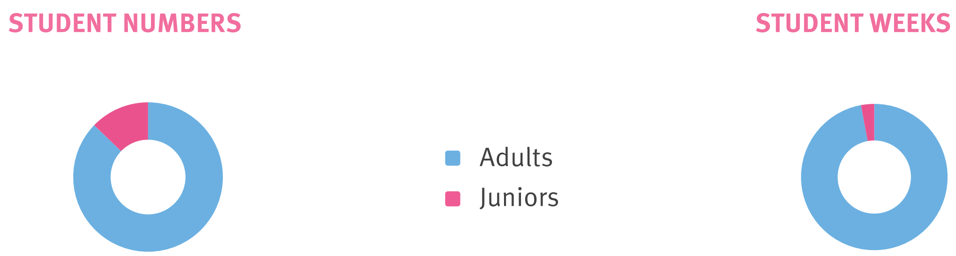
A slight increase in share was also noticed for short-term study visas (6 months child), which averaged out to 6%. Similarly, the proportion of students studying English on other types of visa represented 6%.

The average number of visa denials per state sector member stood at 8.

STATE SECTOR MEMBER CENTRES

ADULT VS JUNIOR SEGMENT

Chart 7: Share of adults and juniors out of the total number of students and student weeks in the UK (state sector)

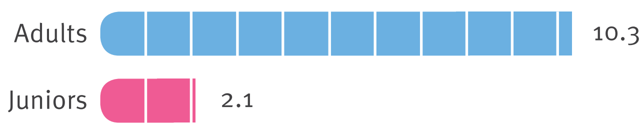


Source: English UK, 2018; n=59 state sector member centres

The state sector membership data analysis presented on the following pages is based on various samples of state sector member centres (depending on their ability to provide the breakdowns in question). The sample is always noted below the respective chart or table.

Due to the nature of the state sector membership, the centres were primarily attended by adult students. However, between 2017 and 2018, the proportion of junior English language learners grew from 10% to 13%. The under-18 age band accounted for 3% of all weeks.

Chart 8: Average length of stay (weeks, state sector)



Source: English UK, 2018; n=59 state sector member centres

Overall, course duration increased y-o-y and averaged out to 9.2 weeks (8.8 weeks in 2017), thanks to longer stays by adult students, who studied English for an average of 10.3 weeks, an increase from 9.5 weeks in 2017.

Conversely, the average length of stay for junior students dropped notably, from 3.1 weeks to 2.1 weeks.

STATE SECTOR MEMBER CENTRES

SOURCE REGIONS

Table 2: Student weeks, students and average length of stay (weeks) by source region (state sector, rank by student weeks)

Source region	Student weeks (2017)	Student weeks (2018)	Share (%, 2018)	Change in student weeks (%)	Student numbers (2017)	Student numbers (2018)	Share (%, 2018)	Change in student numbers (%)	Average length of stay (2018)
Asia	124,786	148,165	58.3%	12.3%	16,130	19,373	58.7%	12.3%	7.6
Eastern Europe	20,391	33,848	13.3%	18.9%	1,532	2,128	6.5%	-10.3%	15.9
Middle East	31,307	32,967	13.0%	1.8%	2,896	3,690	11.2%	-1.2%	8.9
Western Europe	21,346	27,076	10.6%	-2.0%	4,594	5,794	17.6%	7.9%	4.7
Latin America	4,859	7,088	2.8%	-7.8%	523	871	2.6%	37.0%	8.1
Africa	3,562	4,879	1.9%	-14.6%	412	1,093	3.3%	-38.8%	4.0
North America	279	258	0.1%	-7.5%	26	39	0.1%	50.0%	6.6
Australasia	48	24	< 0.1%	-50.0%	3	2	< 0.1%	-33.3%	12.0

Source: English UK, 2018; n=52 state sector member centres (y-o-y changes are based on a sample of 42 providers reporting in both 2017 and 2018 to provide a like-for-like comparison).
Note: Percentages do not add up to 100% due to rounding.

The growth in the state sector was also fairly uneven across source countries. Of 114 markets, only 39 posted a positive development, while the rest declined.

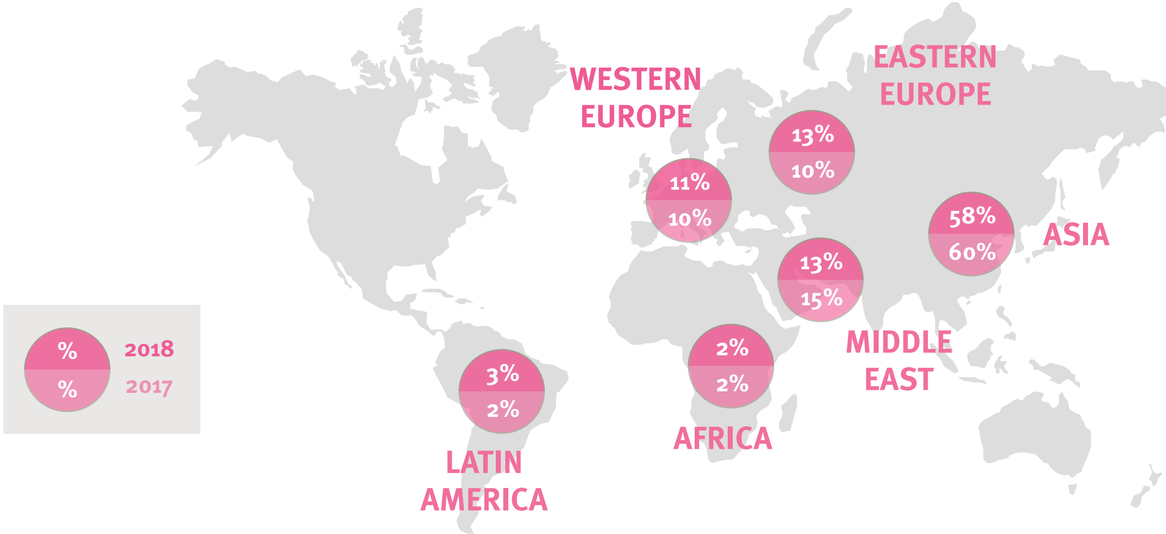
While the sum of student numbers and weeks per each region is based on the totals provided by member centres in the respective years (the sample varies), in order to provide more accurate insight into source market performance, historical comparisons based only on centres reporting in both 2017 and 2018 have been used (using overall data for 2017 and 2018 would lead to inflating the change for some nationalities/regions such as Africa).

The state sector membership is largely dependent on Asia, which produced 58% of all student weeks and 59% of all state sector students.

Eastern Europe exhibited the highest average length of stay and outperformed the Middle East in terms of student weeks in 2018. Its performance was fuelled by increases in student weeks from students from Romania, Poland and, partially, Bulgaria. This was, however, also due to changes in the research sample, given that new centres participating in 2018 attracted a considerable population from Eastern Europe.

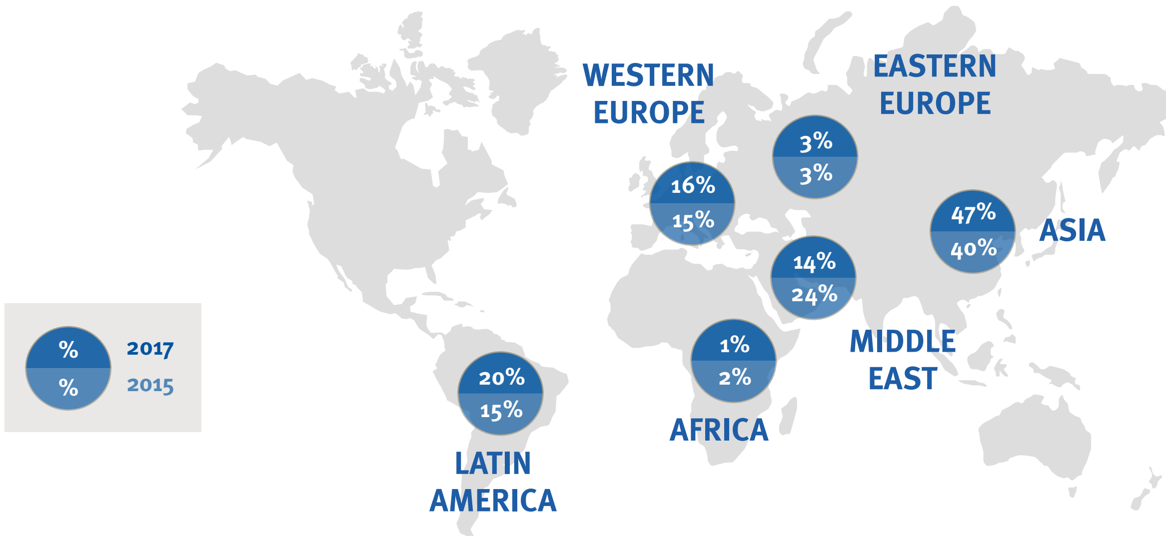
Latin America, as a region, shrank due to declines in Panama and Colombia, which outweighed the positive development posted by Brazil, Chile and Argentina.

Chart 9: Source region market shares (UK ELT, student weeks at state sector centres, 2017 vs 2018)



Source: English UK, 2018
Note: A comparison of 2016 and 2018 figures does not reflect fluctuation in English UK membership.

Chart 10: Source region market shares (global ELT, student weeks, 2015 vs 2017)



Source: BONARD, 2018
Note: Global data for 2018 was unavailable at the time of compilation of this report. Percentages do not add up to 100% due to rounding.

STATE SECTOR MEMBER CENTRES

SOURCE MARKETS

Not only is China the undisputed top market – the country generated 108,907 student weeks, just below 43% of all those in the sector – but it also drove further growth in the sector in 2018. Student weeks surged by almost 20%, with China generating 17,058 more than in 2017 (historical comparisons are based only on centres reporting in both 2017 and 2018).

It was followed by Romania (+2,929 student weeks) and Poland (+1,528). 2018 marked relatively good performance of countries located in the Middle East, especially Turkey and Saudi Arabia. Another strong development was posted by Italy, which grew by 20% in terms of student weeks and 24% in terms of student numbers.

Table 3: Student weeks, students and average length of stay (weeks) by source market (state sector, rank by student weeks)

Rank	Country/region	Student weeks (2017)	Student weeks (2018)	Share (%, 2018)	Change in student weeks (%)	Student numbers (2017)	Student numbers (2018)	Share (%, 2018)	Change in student numbers (%)	Average length of stay (2018)
1	China	87,124	108,907	42.8%	19.8%	10,750	13,491	40.9%	17.1%	8.1
2	Poland	11,781	19,777	7.8%	13.2%	576	991	3.0%	-13.3%	20.0
3	Japan	15,532	17,537	6.9%	1.8%	2,554	2,915	8.8%	10.0%	6.0
4	Saudi Arabia	16,740	17,228	6.8%	2.8%	1,469	1,519	4.6%	4.4%	11.3
5	Spain	5,910	10,481	4.1%	-2.7%	1,151	1,513	4.6%	3.7%	6.9
6	South Korea	7,765	7,510	3.0%	-1.8%	1,073	1,185	3.6%	14.1%	6.3
7	Italy	4,769	6,334	2.5%	20.2%	1,536	2,132	6.5%	24.1%	3.0
8	Romania	1,317	4,530	1.8%	236.2%	155	332	1.0%	104.8%	13.6
9	Thailand	4,244	4,422	1.7%	-5.3%	522	465	1.4%	-15.9%	9.5
10	Kuwait	3,333	3,901	1.5%	5.1%	293	354	1.1%	-8.3%	11.0
11	Syria	2,463	3,617	1.4%	-0.2%	169	466	1.4%	13.9%	7.8
12	Bulgaria	1,803	3,462	1.4%	24.8%	112	169	0.5%	-15.0%	20.5
13	Turkey	2,787	3,435	1.4%	27.1%	366	412	1.2%	5.8%	8.3
14	Taiwan	4,121	2,967	1.2%	-26.2%	560	422	1.3%	-22.0%	7.0
15	Other Africa	1,603	2,964	1.2%	9.8%	202	832	2.5%	-34.7%	3.6
16	United Kingdom	2,160	2,730	1.1%	-8.9%	184	261	0.8%	27.9%	10.5
17	France	1,944	2,362	0.9%	-4.8%	407	481	1.5%	-31.0%	4.9
18	Panama	1,510	2,126	0.8%	-28.5%	108	165	0.5%	-28.0%	12.9
19	Brazil	1,122	1,643	0.6%	29.4%	175	315	1.0%	83.7%	5.2
20	Germany	1,291	1,478	0.6%	10.3%	417	473	1.4%	7.8%	3.1
21	Vietnam	588	1,348	0.5%	-4.0%	88	131	0.4%	-5.9%	10.3
22	Iran	757	1,333	0.5%	35.8%	71	406	1.2%	-1.7%	3.3
23	Russia	1,246	1,099	0.4%	-15.5%	214	253	0.8%	4.4%	4.3
24	Hong Kong	951	986	0.4%	-1.9%	110	127	0.4%	18.0%	7.8
25	Pakistan	911	939	0.4%	-14.6%	97	146	0.4%	-42.7%	6.4
26	Colombia	917	938	0.4%	-17.2%	94	136	0.4%	15.5%	6.9

The biggest declines were registered for Taiwan (-1,049 weeks), Panama (-427) and Kazakhstan (-412).

The most popular region for Chinese students enrolled in the state sector was Northern England (53%), followed by Central England (27%). Students from Poland chiefly chose Scotland as their English language study location. Japanese students, as the third largest cohort, were more dispersed across the UK and a considerable population was also found in South and South Eastern England.

Rank	Country/region	Student weeks (2017)	Student weeks (2018)	Share (%, 2018)	Change in student weeks (%)	Student numbers (2017)	Student numbers (2018)	Share (%, 2018)	Change in student numbers (%)	Average length of stay (2018)
27	Portugal	866	928	0.4%	-48.0%	110	118	0.4%	-59.8%	7.9
28	Hungary	673	920	0.4%	-41.8%	57	70	0.2%	-41.8%	13.1
29	Other Asia/Far East	838	899	0.4%	-22.6%	73	75	0.2%	-43.5%	12.0
30	Latvia	753	899	0.4%	-23.8%	46	46	0.1%	-30.5%	19.5
31	Czech Republic	658	854	0.3%	10.7%	116	77	0.2%	-44.3%	11.1
32	Libya	776	837	0.3%	-32.3%	50	88	0.3%	-23.9%	9.5
33	Kazakhstan	1,242	835	0.3%	-33.2%	129	116	0.4%	-10.9%	7.2
34	Lithuania	377	815	0.3%	4.7%	37	47	0.1%	-52.8%	17.3
35	Chile	386	653	0.3%	32.0%	44	93	0.3%	118.9%	7.0
36	Switzerland	788	630	0.2%	-26.9%	191	153	0.5%	-23.5%	4.1
37	Greece	529	616	0.2%	-13.0%	65	59	0.2%	-46.4%	10.4
38	Netherlands	396	557	0.2%	-2.4%	145	346	1.0%	109.1%	1.6
39	Oman	947	534	0.2%	-39.5%	107	62	0.2%	-38.6%	8.6
40	Mexico	276	519	0.2%	-28.3%	22	45	0.1%	66.7%	11.5
41	Jordan	675	516	0.2%	-24.3%	59	53	0.2%	-10.3%	9.7
42	Iraq	693	512	0.2%	-41.7%	50	208	0.6%	-34.0%	2.5
43	India	388	503	0.2%	-13.0%	46	77	0.2%	-34.1%	6.5
44	Indonesia	303	448	0.2%	47.7%	36	87	0.3%	145.7%	5.1
45	Slovakia	344	410	0.2%	-35.0%	41	29	0.1%	-55.0%	14.1
46	Cyprus	515	356	0.1%	-41.8%	53	27	0.1%	-55.8%	13.2
47	Qatar	982	348	0.1%	-17.9%	140	22	0.1%	-54.2%	15.8
48	Other Middle East	273	347	0.1%	44.7%	24	76	0.2%	-43.5%	4.6
49	Argentina	120	347	0.1%	127.4%	24	27	0.1%	75.0%	12.9
50	United Arab Emirates	896	346	0.1%	-54.3%	75	36	0.1%	-45.3%	9.6
51	Bahrain	460	318	0.1%	-23.4%	39	26	0.1%	-25.7%	12.2
52	Algeria	144	296	0.1%	5.6%	15	52	0.2%	26.7%	5.7

Rank	Country/region	Student weeks (2017)	Student weeks (2018)	Share (%, 2018)	Change in student weeks (%)	Student numbers (2017)	Student numbers (2018)	Share (%, 2018)	Change in student numbers (%)	Average length of stay (2018)
53	Ecuador	178	288	0.1%	4.8%	21	29	0.1%	20.0%	9.9
54	Nigeria	362	274	0.1%	-45.9%	36	31	0.1%	-58.3%	8.8
55	Belgium	144	266	0.1%	-10.0%	19	29	0.1%	-5.6%	9.2
56	Venezuela	123	240	0.1%	-56.1%	6	14	‹ 0.1%	0.0%	17.1
57	Sweden	239	234	0.1%	1.1%	20	23	0.1%	26.7%	10.2
58	Albania	225	224	0.1%	7.6%	29	35	0.1%	-50.0%	6.4
59	Egypt	237	222	0.1%	-12.5%	25	38	0.1%	-21.1%	5.8
60	Yemen	103	221	0.1%	156.9%	11	17	0.1%	57.1%	13.0
61	Other Western Europe	1,813	195	0.1%	467.9%	208	124	0.4%	266.7%	1.6
62	Ukraine	243	194	0.1%	-27.1%	31	25	0.1%	-30.8%	7.8
63	Morocco	164	187	0.1%	-14.3%	60	27	0.1%	-66.1%	6.9
64	Malaysia	140	185	0.1%	-1.4%	11	17	0.1%	18.2%	10.9
65	USA	170	177	0.1%	4.1%	15	32	0.1%	113.3%	5.5
66	Nepal	23	144	0.1%	56.5%	29	15	‹ 0.1%	-75.9%	9.6
67	Other Central America	24	142	0.1%	-16.7%	2	12	‹ 0.1%	150.0%	11.8
68	Lebanon	106	136	0.1%	-5.7%	10	17	0.1%	-20.0%	8.0
69	Azerbaijan	116	133	0.1%	-59.5%	9	49	0.1%	-33.3%	2.7
70	Austria	60	126	‹ 0.1%	66.7%	24	46	0.1%	75.0%	2.7
71	Palestine	71	98	‹ 0.1%	29.6%	10	10	‹ 0.1%	-10.0%	9.8
72	Moldova	18	96	‹ 0.1%	166.7%	3	4	‹ 0.1%	-50.0%	24.0
73	Georgia	16	92	‹ 0.1%	125.0%	3	10	‹ 0.1%	-33.3%	9.2
74	Angola	231	84	‹ 0.1%	-79.2%	20	18	0.1%	-85.0%	4.7
75	Israel	21	77	‹ 0.1%	272.7%	3	6	‹ 0.1%	100.0%	12.8
76	Estonia	188	73	‹ 0.1%	-80.2%	9	4	‹ 0.1%	-80.0%	18.3
77	Iceland	55	71	‹ 0.1%	29.1%	12	15	‹ 0.1%	25.0%	4.7
78	Canada	55	69	‹ 0.1%	25.5%	6	6	‹ 0.1%	0.0%	11.5
79	Macao	157	67	‹ 0.1%	-57.3%	11	6	‹ 0.1%	-45.5%	11.2
80	Peru	104	63	‹ 0.1%	-39.4%	11	20	0.1%	81.8%	3.2
81	Tajikistan	17	50	‹ 0.1%	-100.0%	2	1	‹ 0.1%	-100.0%	50.0
82	Philippines	65	49	‹ 0.1%	19.5%	6	3	‹ 0.1%	-40.0%	16.3
83	Macedonia	2	48	‹ 0.1%	2300.0%	1	3	‹ 0.1%	200.0%	16.0
84	Uzbekistan	34	47	‹ 0.1%	-38.2%	3	11	‹ 0.1%	-33.3%	4.3
85	Other South America	19	46	‹ 0.1%	0.0%	11	10	‹ 0.1%	200.0%	4.6

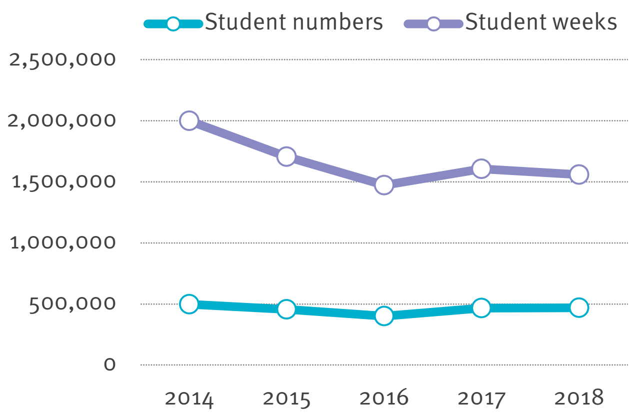
Rank	Country/region	Student weeks (2017)	Student weeks (2018)	Share (%, 2018)	Change in student weeks (%)	Student numbers (2017)	Student numbers (2018)	Share (%, 2018)	Change in student numbers (%)	Average length of stay (2018)
86	Uruguay	34	41	‹ 0.1%	20.6%	2	2	‹ 0.1%	0.0%	20.5
87	Other Eastern Europe	79	36	‹ 0.1%	-100.0%	23	3	‹ 0.1%	-100.0%	12.0
88	Turkmenistan	36	36	‹ 0.1%	0.0%	3	3	‹ 0.1%	0.0%	12.0
89	Paraguay	0	36	‹ 0.1%	0.0%	0	2	‹ 0.1%	0.0%	18.0
90	Norway	161	30	‹ 0.1%	-79.2%	18	10	‹ 0.1%	-28.6%	3.0
91	Denmark	149	28	‹ 0.1%	-77.4%	76	8	‹ 0.1%	-88.9%	3.5
92	Slovenia	14	28	‹ 0.1%	-28.6%	7	4	‹ 0.1%	-57.1%	7.0
93	Singapore	70	24	‹ 0.1%	-50.0%	6	2	‹ 0.1%	-33.3%	12.0
94	Australia	48	24	‹ 0.1%	-65.7%	3	2	‹ 0.1%	-66.7%	12.0
95	Armenia	12	16	‹ 0.1%	-100.0%	2	16	‹ 0.1%	-100.0%	1.0
96	Tunisia	45	15	‹ 0.1%	20.0%	4	7	‹ 0.1%	0.0%	2.1
97	Cambodia	23	15	‹ 0.1%	-66.7%	2	2	‹ 0.1%	75.0%	7.5
98	Croatia	46	14	‹ 0.1%	-82.6%	8	5	‹ 0.1%	-75.0%	2.8
99	Belarus	56	12	‹ 0.1%	-83.9%	6	3	‹ 0.1%	-66.7%	4.0
100	Other North America	54	12	‹ 0.1%	-77.8%	5	1	‹ 0.1%	-80.0%	12.0
101	Mongolia	70	6	‹ 0.1%	-50.0%	5	1	‹ 0.1%	0.0%	6.0
102	Bolivia	12	6	‹ 0.1%	-14.3%	1	1	‹ 0.1%	0.0%	6.0
103	Luxembourg	7	6	‹ 0.1%	-89.5%	2	2	‹ 0.1%	-75.0%	3.0
104	Ireland	0	4	‹ 0.1%	N/A	0	1	‹ 0.1%	N/A	4.0
105	Bosnia and Herzegovina	14	1	‹ 0.1%	-92.9%	4	1	‹ 0.1%	-75.0%	1.0
106	Finland	65	0	0%	-100.0%	9	0	0%	-100.0%	N/A
107	Serbia	39	0	0%	-100.0%	4	0	0%	-100.0%	N/A
108	Costa Rica	34	0	0%	-100.0%	2	0	0%	-100.0%	N/A
109	Kyrgyzstan	0	0	0%	N/A	0	0	0%	N/A	N/A
110	Liechtenstein	0	0	0%	N/A	0	0	0%	N/A	N/A
111	Monaco	0	0	0%	N/A	0	0	0%	N/A	N/A
112	Montenegro	0	0	0%	N/A	0	0	0%	N/A	N/A
113	New Zealand	0	0	0%	N/A	0	0	0%	N/A	N/A
114	Other Australasia	0	0	0%	N/A	0	0	0%	N/A	N/A

Source: English UK, 2018; n=52 state sector member centres (y-o-y changes are based on a sample of 42 providers reporting in both 2017 and 2018 to provide a like-for-like comparison).

PRIVATE SECTOR MEMBER CENTRES

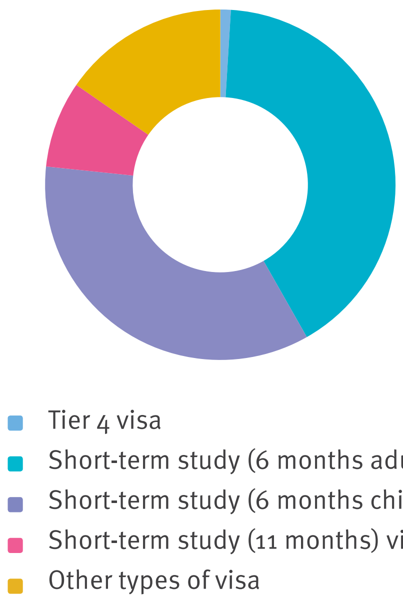
MARKET OVERVIEW

Chart 11: Student numbers and student weeks taught by English UK private sector members



Source: English UK, 2014-2018

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



Source: English UK, 2018

English UK private sector members encompassed 360 language schools in 2018. Overall, they welcomed 470,073 English language students, a 1% growth over 2017. At the same time, student weeks dropped by 3%, to 1,558,448.

Data from centres that reported in both 2017 and 2018 yields the comparison below:

	Student numbers	Student weeks
2017 (n=347)	456,836	1,557,959
2018 (n=347)	463,938	1,532,330
Change (%)	+1.6%	-1.6%

On average, an English UK private centre taught 768 adults and delivered 3,859 weeks, representing y-o-y changes of 5% and -1% respectively over 2017.

The average junior student population per centre grew by 1% to 936 students; however, the number of weeks per centre declined by 2% to 1,733 (from 1,773 in 2017).

Most students in private centres (41%) applied under the short-term study visa (6 months adult). This was followed by those under the short-term study visa (6 months child), who accounted for 35% of students. As many as 15% of students studied under other types of visa, which indicates a greater diversity than in the state sector.

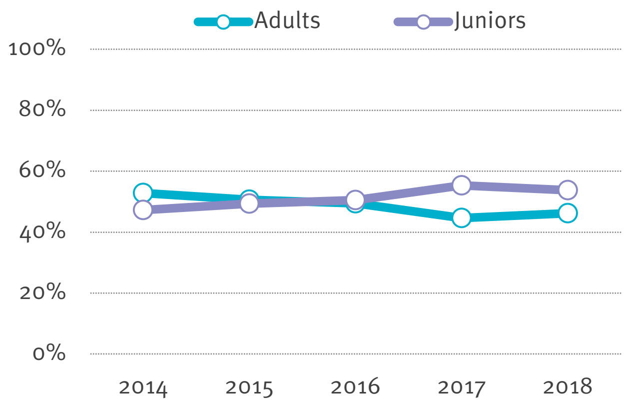
Similarly to the state sector, the average number of visa denials per private sector member stood at 8 in 2018.

PRIVATE SECTOR MEMBER CENTRES

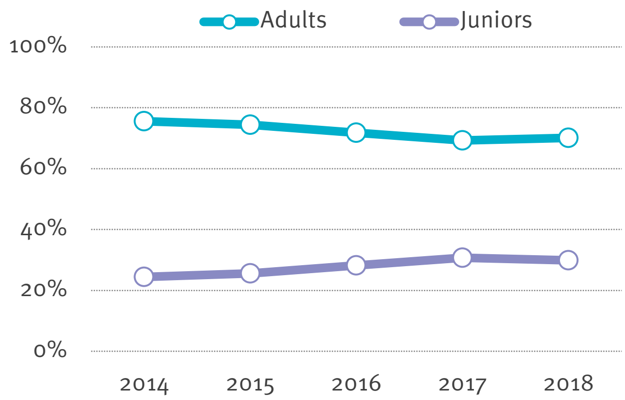
ADULT VS JUNIOR SEGMENT

Chart 13: Share of adults and juniors out of the total number of students and student weeks in the UK (private sector)

STUDENT NUMBERS



STUDENT WEEKS

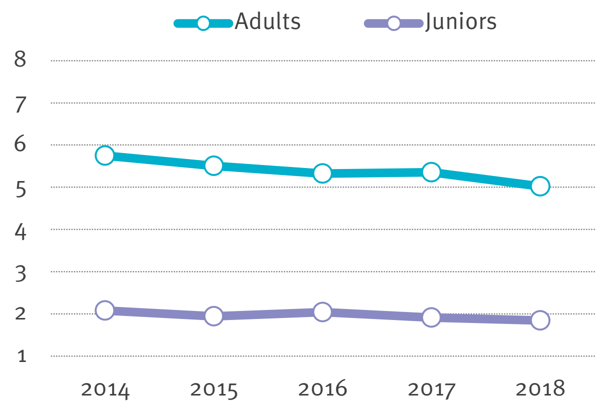


Source: English UK, 2014-2018

After a steady uptake over the last eight years, 2018 marked the first, albeit minor, decrease in the share of junior students in the UK. The under-18 segment accounted for 252,654 students (54% of all students in private sector members).

The adult student population recorded a 5% y-o-y growth, which brought the total to 217,419 students (+9,448). Nonetheless, both age bands posted considerable declines in overall student weeks (-21,222 for adults and -26,610 for juniors).

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



Source: English UK, 2014-2018

The respective decreases in student weeks were the result of shorter stays displayed by both age groups in 2018.

The deepening of this trend was more notable in the case of adults, for whom the average course duration dropped from 5.3 weeks to 5 weeks. The average length of stay for junior students decreased from 1.9 to 1.8 weeks.

PRIVATE SECTOR MEMBER CENTRES

SOURCE REGIONS

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

Source region	Student weeks (2017)	Student weeks (2018)	Share (%, 2018)	Change in student weeks (%)	Student numbers (2017)	Student numbers (2018)	Share (%, 2018)	Change in student numbers (%)	Average length of stay (2018)
Western Europe	667,833	647,865	41.6%	-2.8%	281,665	281,217	59.8%	0.1%	2.3
Middle East	321,326	319,052	20.5%	1.1%	41,779	43,618	9.3%	5.4%	7.3
Asia	322,165	300,349	19.3%	-4.2%	67,265	67,694	14.4%	1.0%	4.4
Latin America	170,107	171,717	11.0%	3.3%	31,986	34,057	7.2%	8.5%	5.0
Eastern Europe	103,549	99,762	6.4%	-1.6%	38,921	39,583	8.4%	3.3%	2.5
Africa	19,332	17,766	1.1%	-6.9%	3,441	3,400	0.7%	-0.8%	5.2
North America	1,697	1,747	0.1%	9.9%	444	455	0.1%	4.1%	3.8
Australasia	271	190	< 0.1%	-28.8%	41	49	< 0.1%	22.5%	3.9

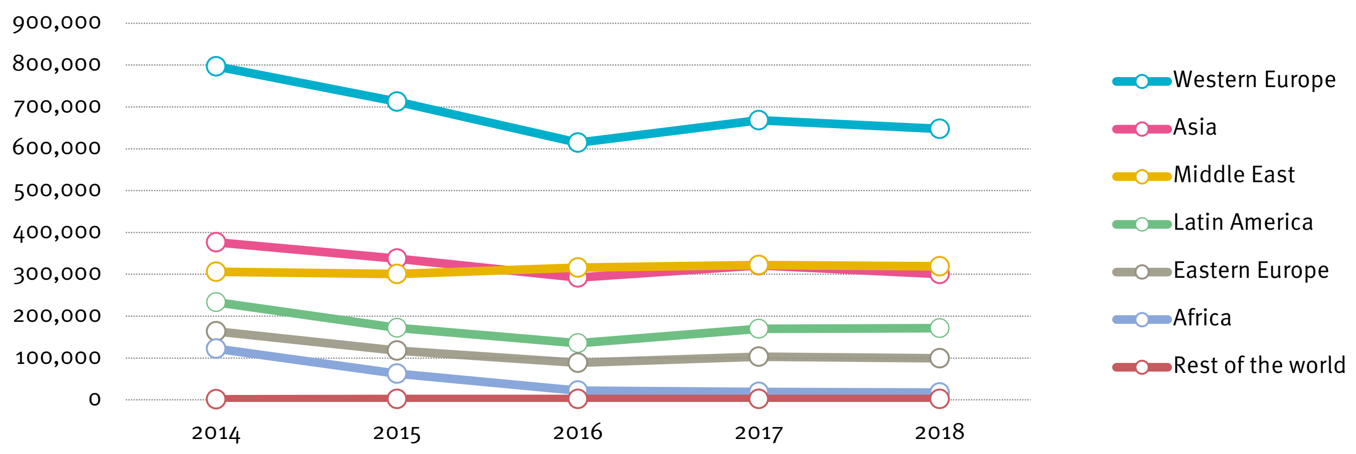
Source: English UK, 2018; (y-o-y changes are based on a sample of 347 providers reporting in both 2017 and 2018 to provide a like-for-like comparison)

Despite a decline in the number of student weeks, Western Europe remains the leading source region for private sector member centres, accounting for 42% of those delivered. Growth in student weeks, if any, came predominantly from Latin America, which was in fact the only region that reported an increase in both student numbers and weeks.

Percentage-wise, the largest downturn in student weeks (-8.1%) was recorded in Africa.

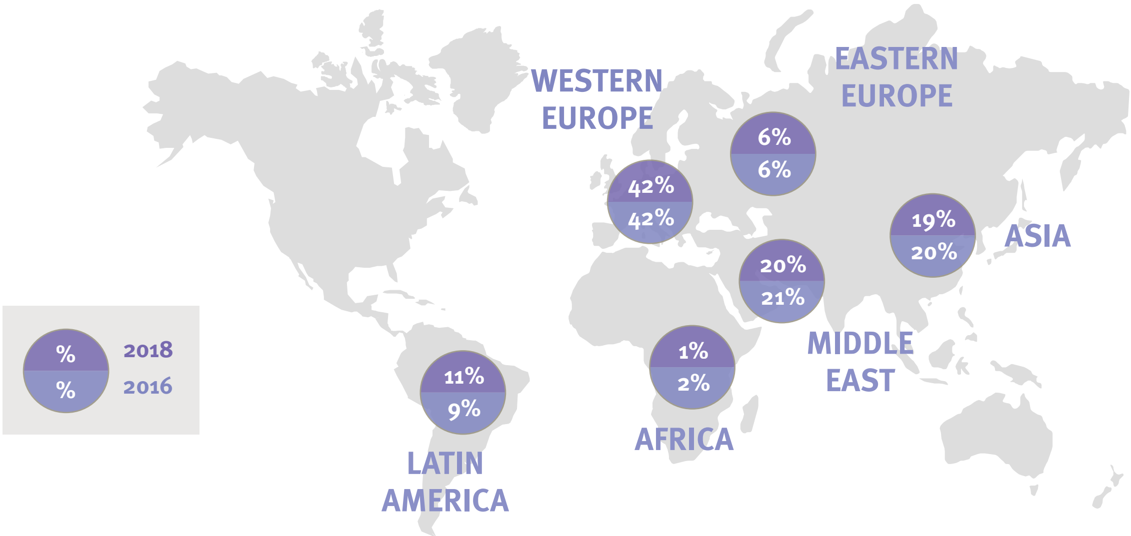
Note: Compared to the previous editions of this report, the regional categorisation has been adjusted to mirror international standards.

Chart 15: Student weeks by source region (2014-2018, private sector)



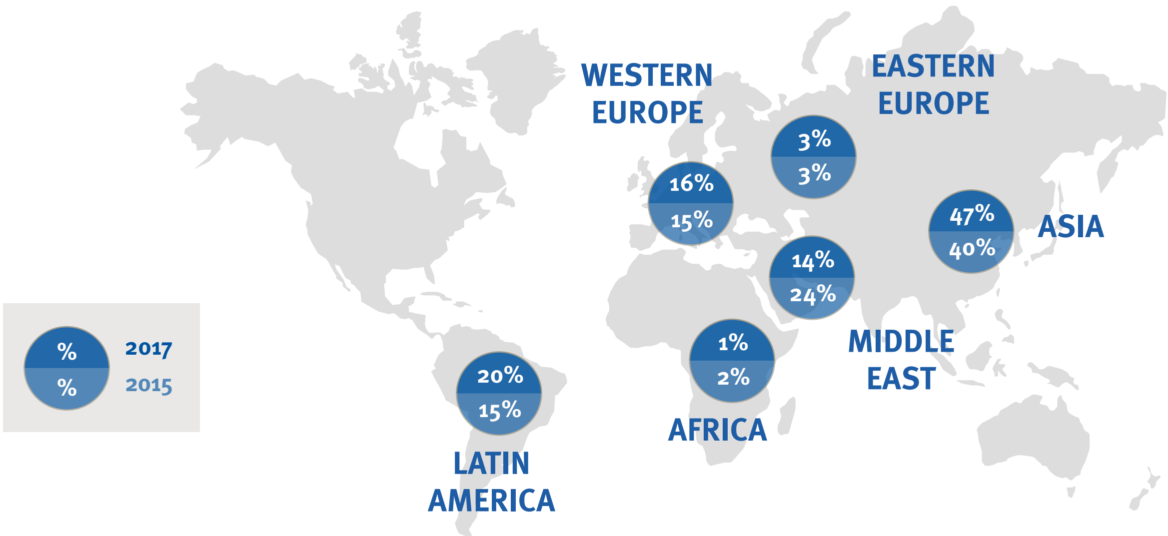
Source: English UK, 2014-2018

Chart 16: Source region market shares (UK ELT, student weeks at private sector centres, 2016 vs 2018)



Source: English UK, 2018
Note: A comparison of 2016 and 2018 figures does not reflect fluctuation in English UK membership.

Chart 17: Source region market shares (global ELT, student weeks, 2015 vs 2017)



Source: BONARD, 2018
Note: Global data for 2018 was unavailable at the time of compilation of this report. Percentages do not add up to 100% due to rounding.

PRIVATE SECTOR MEMBER CENTRES

SOURCE MARKETS

The top 20 countries represented an 86% share of total number of student weeks in 2018 (85% in 2017). The largest source markets in 2018 were Italy (16.2% of all student weeks), Saudi Arabia (9.5%), Spain (7.2%), China (6.1%) and France (5.6%). However, with the exception of Saudi Arabia, all faced a decline in student weeks. Saudi Arabia showed the highest growth (+15,154 weeks or +11.7%), followed by Argentina (+4,776 or 24.8%) and Chile (+4,095 or 28.8%). A promising performance was also recorded by Oman, Qatar, Israel and Ecuador.

After posting a 12.8% downturn in student weeks, Turkey dropped to sixth position, being overtaken by France (despite the latter experiencing a decline of 0.2%).

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

Rank	Country/region	Student weeks (2017)	Student weeks (2018)	Share (%, 2018)	Change in student weeks (%)	Student numbers (2017)	Student numbers (2018)	Share (%, 2018)	Change in student numbers (%)	Average length of stay (2018)
1	Italy	265,362	251,730	16.2%	-5.1%	128,357	125,840	26.8%	-1.4%	2.0
2	Saudi Arabia	134,301	147,664	9.5%	11.7%	14,941	17,455	3.7%	17.3%	8.5
3	Spain	114,277	112,369	7.2%	-1.8%	43,211	45,237	9.6%	4.4%	2.5
4	China	98,011	95,318	6.1%	-0.6%	33,923	33,881	7.2%	-0.4%	2.8
5	France	87,508	87,163	5.6%	-0.2%	34,794	35,331	7.5%	1.7%	2.5
6	Turkey	97,263	83,637	5.4%	-12.8%	14,904	14,106	3.0%	-4.4%	5.9
7	Switzerland	74,996	69,871	4.5%	-6.1%	17,957	16,853	3.6%	-5.1%	4.1
8	South Korea	73,084	63,388	4.1%	-11.7%	5,964	6,515	1.4%	9.1%	9.7
9	Brazil	62,198	62,194	4.0%	0.5%	12,983	13,640	2.9%	5.7%	4.6
10	Japan	63,730	61,031	3.9%	-3.2%	11,025	11,481	2.4%	4.3%	5.3
11	Germany	59,498	58,823	3.8%	-0.5%	30,597	30,901	6.6%	1.1%	1.9
12	Russia	47,154	45,258	2.9%	-1.7%	17,469	17,555	3.7%	1.7%	2.6
13	Colombia	33,122	30,472	2.0%	-2.9%	3,158	3,009	0.6%	0.8%	10.1
14	Kuwait	33,227	29,333	1.9%	-7.7%	3,236	2,997	0.6%	-5.4%	9.8
15	Thailand	24,602	26,346	1.7%	17.2%	3,980	4,510	1.0%	21.6%	5.8
16	Oman	22,682	25,346	1.6%	19.2%	2,926	3,304	0.7%	18.3%	7.7
17	Taiwan	28,534	24,289	1.6%	-14.0%	4,616	4,091	0.9%	-11.2%	5.9
18	Argentina	19,602	24,229	1.6%	24.8%	5,923	7,856	1.7%	34.0%	3.1
19	Chile	14,770	18,500	1.2%	28.8%	2,331	2,847	0.6%	28.7%	6.5
20	Mexico	17,173	15,115	1.0%	-12.2%	4,056	3,447	0.7%	-15.5%	4.4
21	Poland	13,568	12,712	0.8%	-5.2%	6,070	5,644	1.2%	-5.9%	2.3
22	United Kingdom	5,541	12,505	0.8%	128.9%	1,427	2,496	0.5%	75.6%	5.0
23	Austria	12,144	11,484	0.7%	-5.3%	8,601	8,130	1.7%	-5.5%	1.4
24	Qatar	8,805	11,207	0.7%	28.5%	766	975	0.2%	27.6%	11.5
25	Belgium	10,841	10,050	0.6%	-7.5%	3,678	3,757	0.8%	2.2%	2.7
26	Czech Republic	9,229	9,874	0.6%	12.4%	4,351	4,800	1.0%	15.8%	2.1

The private sector had slightly more growth markets than the state sector (42 vs 39); however, it struggled to recruit more students from countries such as China and Japan, which exhibit further growth potential for the UK. While China was the undisputed source of growth for the state sector, it declined in the private sector for the first time since it was measured as a stand-alone market.

Countries with the steepest declines were Italy (-13,355), Turkey (-11,949) and South Korea (-8,087).

EU students spent, on average, 2.2 weeks, whilst non-EU students stayed, on average, 5 weeks at private sector providers.

Rank	Country/region	Student weeks (2017)	Student weeks (2018)	Share (%, 2018)	Change in student weeks (%)	Student numbers (2017)	Student numbers (2018)	Share (%, 2018)	Change in student numbers (%)	Average length of stay (2018)
27	Ukraine	8,517	8,628	0.6%	3.1%	2,939	3,250	0.7%	12.3%	2.7
28	Kazakhstan	8,210	8,608	0.6%	5.7%	2,111	2,105	0.4%	0.1%	4.1
29	Portugal	9,136	8,517	0.5%	-7.9%	2,857	2,885	0.6%	-0.4%	3.0
30	Netherlands	9,396	7,773	0.5%	-16.9%	3,805	3,231	0.7%	-15.1%	2.4
31	Hong Kong	9,113	6,799	0.4%	-24.2%	2,041	1,515	0.3%	-25.5%	4.5
32	Sweden	7,517	6,146	0.4%	-18.5%	1,967	1,545	0.3%	-21.3%	4.0
33	Israel	4,658	5,498	0.4%	17.7%	2,187	2,302	0.5%	4.7%	2.4
34	Venezuela	5,009	4,903	0.3%	-1.7%	640	533	0.1%	-16.9%	9.2
35	United Arab Emirates	6,841	4,738	0.3%	-26.2%	978	829	0.2%	-13.0%	5.7
36	Peru	4,171	4,317	0.3%	9.9%	654	741	0.2%	22.1%	5.8
37	Ecuador	3,635	4,177	0.3%	20.4%	421	630	0.1%	56.4%	6.6
38	Other Africa	4,148	4,106	0.3%	-1.8%	659	620	0.1%	-7.2%	6.6
39	Algeria	4,997	3,961	0.3%	-18.0%	741	719	0.2%	-2.1%	5.5
40	Hungary	3,442	3,714	0.2%	10.2%	1,221	1,333	0.3%	10.3%	2.8
41	Morocco	3,785	3,583	0.2%	-4.9%	803	823	0.2%	3.7%	4.4
42	Bulgaria	3,871	3,263	0.2%	-14.8%	976	918	0.2%	-5.8%	3.6
43	Romania	3,630	3,146	0.2%	-14.4%	1,190	1,296	0.3%	7.7%	2.4
44	Iran	3,246	2,947	0.2%	-10.4%	392	397	0.1%	-2.3%	7.4
45	Denmark	3,466	2,879	0.2%	-16.1%	1,305	1,291	0.3%	0.2%	2.2
46	Greece	2,914	2,719	0.2%	-7.9%	1,043	1,170	0.2%	11.4%	2.3
47	Panama	4,049	2,475	0.2%	-29.8%	343	212	< 0.1%	-32.7%	11.7
48	Jordan	2,780	2,288	0.1%	-19.3%	379	327	0.1%	-14.3%	7.0
49	Slovakia	2,794	2,283	0.1%	-18.0%	991	865	0.2%	-12.2%	2.6
50	Vietnam	2,333	1,845	0.1%	-19.6%	589	519	0.1%	-11.4%	3.6
51	Angola	2,440	1,756	0.1%	-27.6%	240	234	< 0.1%	-2.1%	7.5
52	Uruguay	1,820	1,747	0.1%	4.6%	495	474	0.1%	4.0%	3.7

PRIVATE SECTOR MEMBER CENTRES

SOURCE MARKETS

Rank	Country/region	Student weeks (2017)	Student weeks (2018)	Share (%, 2018)	Change in student weeks (%)	Student numbers (2017)	Student numbers (2018)	Share (%, 2018)	Change in student numbers (%)	Average length of stay (2018)
53	Libya	1,413	1,660	0.1%	18.5%	167	206	‹ 0.1%	22.4%	8.1
54	Norway	1,485	1,639	0.1%	10.3%	627	706	0.2%	12.8%	2.3
55	Tunisia	1,456	1,632	0.1%	12.1%	571	483	0.1%	-15.4%	3.4
56	Indonesia	1,782	1,613	0.1%	-9.9%	425	283	0.1%	-33.8%	5.7
57	Syria	1,524	1,571	0.1%	-1.5%	177	178	‹ 0.1%	-5.7%	8.8
58	Belarus	1,362	1,489	0.1%	7.2%	460	543	0.1%	17.3%	2.7
59	Bahrain	2,017	1,488	0.1%	-30.9%	304	191	‹ 0.1%	-41.4%	7.8
60	Other Asia/Far East	1,367	1,396	0.1%	18.5%	223	229	‹ 0.1%	7.8%	6.1
61	Uzbekistan	874	1,389	0.1%	79.4%	264	458	0.1%	81.0%	3.0
62	Serbia	1,387	1,373	0.1%	-0.1%	552	581	0.1%	3.6%	2.4
63	Cyprus	1,318	1,317	0.1%	0.4%	194	255	0.1%	31.8%	5.2
64	Croatia	1,165	1,316	0.1%	10.0%	485	588	0.1%	17.0%	2.2
65	Finland	1,228	1,248	0.1%	2.0%	560	538	0.1%	-3.8%	2.3
66	Other Central America	1,233	1,247	0.1%	3.7%	326	281	0.1%	-10.8%	4.4
67	Yemen	738	1,093	0.1%	52.2%	78	130	‹ 0.1%	69.7%	8.4
68	Azerbaijan	1,414	1,073	0.1%	-19.2%	401	388	0.1%	-1.0%	2.8
69	Other Western Europe	1,094	1,071	0.1%	-1.0%	345	648	0.1%	88.4%	1.7
70	Iraq	2,551	1,044	0.1%	-61.4%	193	175	‹ 0.1%	-13.0%	6.0
71	Latvia	1,031	1,034	0.1%	5.1%	331	365	0.1%	12.8%	2.8
72	Albania	1,321	974	0.1%	-26.9%	215	130	‹ 0.1%	-41.5%	7.5
73	India	1,061	969	0.1%	-5.5%	375	289	0.1%	-23.7%	3.4
74	Georgia	954	934	0.1%	-3.8%	332	333	0.1%	-1.2%	2.8
75	Mongolia	1,444	890	0.1%	-38.4%	109	58	‹ 0.1%	-41.9%	15.3
76	Macao	1,012	874	0.1%	-12.6%	130	152	‹ 0.1%	20.2%	5.8
77	Ireland	65	845	0.1%	1200.0%	12	203	‹ 0.1%	1591.7%	4.2
78	Canada	814	841	0.1%	1.7%	214	241	0.1%	12.3%	3.5
79	Slovenia	712	779	‹ 0.1%	28.8%	336	422	0.1%	49.3%	1.8
80	Other Eastern Europe	573	765	‹ 0.1%	31.6%	170	214	‹ 0.1%	26.8%	3.6
81	Egypt	867	755	‹ 0.1%	-9.5%	212	220	‹ 0.1%	5.3%	3.4
82	Lithuania	1,037	716	‹ 0.1%	-30.5%	367	276	0.1%	-22.7%	2.6
83	Costa Rica	946	651	‹ 0.1%	-29.8%	235	126	‹ 0.1%	-43.7%	5.2
84	Bolivia	493	635	‹ 0.1%	21.3%	73	88	‹ 0.1%	16.7%	7.2
85	Kyrgyzstan	496	631	‹ 0.1%	28.3%	93	92	‹ 0.1%	0.0%	6.9

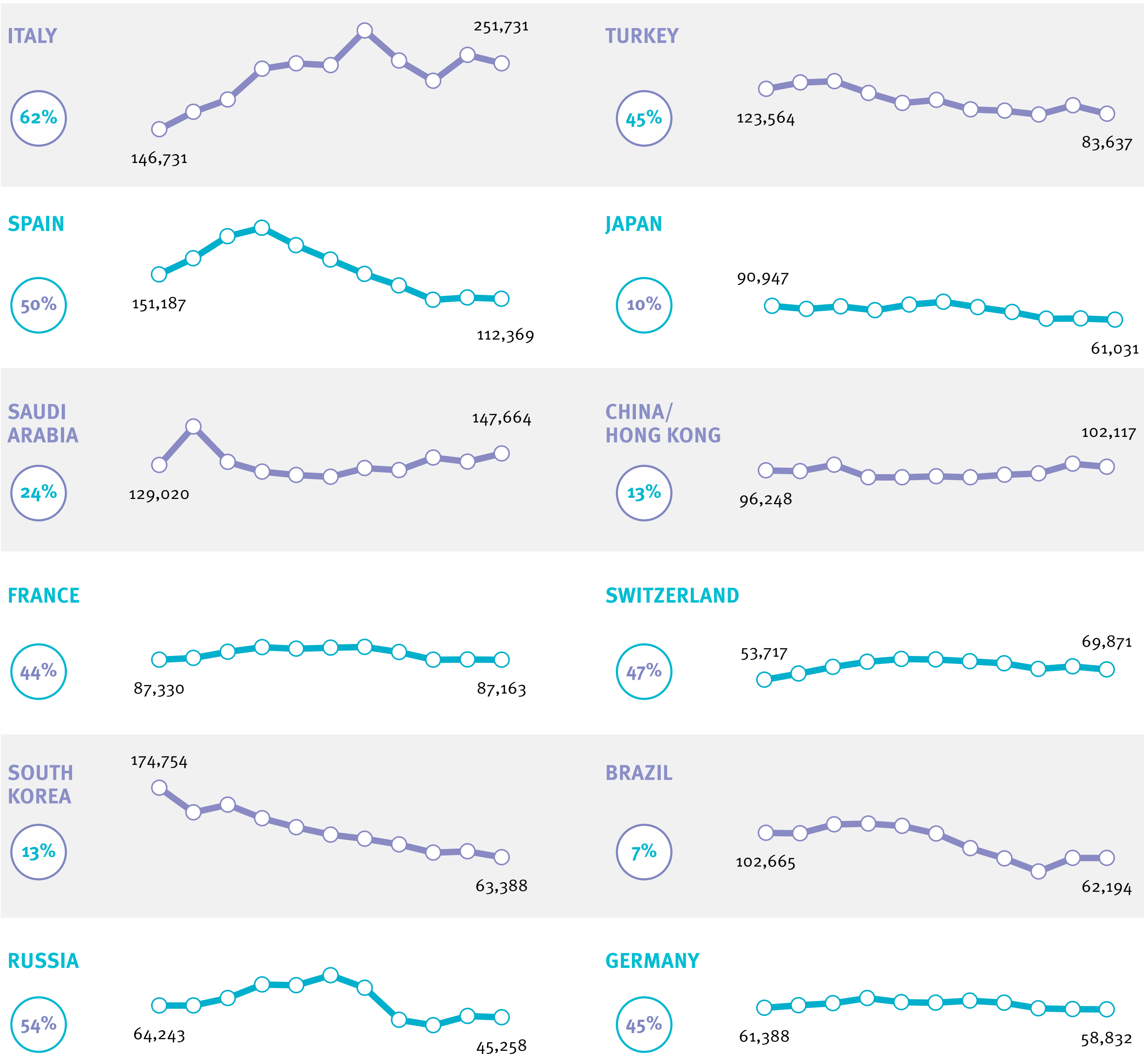
Rank	Country/region	Student weeks (2017)	Student weeks (2018)	Share (%, 2018)	Change in student weeks (%)	Student numbers (2017)	Student numbers (2018)	Share (%, 2018)	Change in student numbers (%)	Average length of stay (2018)
86	USA	745	619	< 0.1%	-5.8%	199	169	< 0.1%	-12.0%	3.7
87	Pakistan	535	611	< 0.1%	28.0%	112	224	< 0.1%	108.4%	2.7
88	Other South America	1,030	571	< 0.1%	-41.1%	226	99	< 0.1%	-54.8%	5.8
89	Turkmenistan	589	562	< 0.1%	-4.6%	74	84	< 0.1%	13.5%	6.7
90	Other Middle East	649	552	< 0.1%	-14.9%	155	73	< 0.1%	-52.9%	7.6
91	Estonia	593	498	< 0.1%	-12.0%	329	338	0.1%	5.3%	1.5
92	Paraguay	856	484	< 0.1%	-43.5%	122	74	< 0.1%	-39.3%	6.5
93	Malaysia	700	443	< 0.1%	-38.2%	117	100	< 0.1%	-14.7%	4.4
94	Palestine	534	406	< 0.1%	-25.5%	63	87	< 0.1%	37.1%	4.7
95	Armenia	437	404	< 0.1%	-7.6%	155	160	< 0.1%	3.2%	2.5
96	Tajikistan	406	391	< 0.1%	54.5%	36	57	< 0.1%	83.9%	6.9
97	Luxembourg	536	379	< 0.1%	-23.7%	198	181	< 0.1%	-6.2%	2.1
98	Nigeria	226	313	< 0.1%	61.3%	48	95	< 0.1%	111.1%	3.3
99	Iceland	421	296	< 0.1%	-29.9%	172	126	< 0.1%	-27.3%	2.3
100	Other North America	138	287	< 0.1%	168.2%	31	45	< 0.1%	50.0%	6.4
101	Liechtenstein	207	269	< 0.1%	36.5%	93	110	< 0.1%	23.6%	2.4
102	Philippines	261	245	< 0.1%	-5.4%	76	61	< 0.1%	-18.7%	4.0
103	Lebanon	349	240	< 0.1%	-31.2%	100	92	< 0.1%	-8.0%	2.6
104	Moldova	220	211	< 0.1%	-4.7%	69	69	< 0.1%	-2.9%	3.1
105	Montenegro	273	172	< 0.1%	-35.1%	93	58	< 0.1%	-36.3%	3.0
106	Cambodia	237	161	< 0.1%	-32.1%	53	64	< 0.1%	20.8%	2.5
107	Macedonia	129	151	< 0.1%	17.1%	30	43	< 0.1%	43.3%	3.5
108	Nepal	63	113	< 0.1%	162.8%	22	31	< 0.1%	55.0%	3.6
109	Australia	191	99	< 0.1%	-47.1%	24	31	< 0.1%	34.8%	3.2
110	Bosnia and Herzegovina	223	89	< 0.1%	-56.2%	83	40	< 0.1%	-48.0%	2.2
111	Monaco	201	89	< 0.1%	-56.7%	59	38	< 0.1%	-39.0%	2.3
112	Other Australasia	45	61	< 0.1%	35.6%	9	8	< 0.1%	-11.1%	7.6
113	New Zealand	35	30	< 0.1%	-14.3%	8	10	< 0.1%	25.0%	3.0
114	Singapore	77	26	< 0.1%	-63.4%	19	14	< 0.1%	-17.6%	1.9

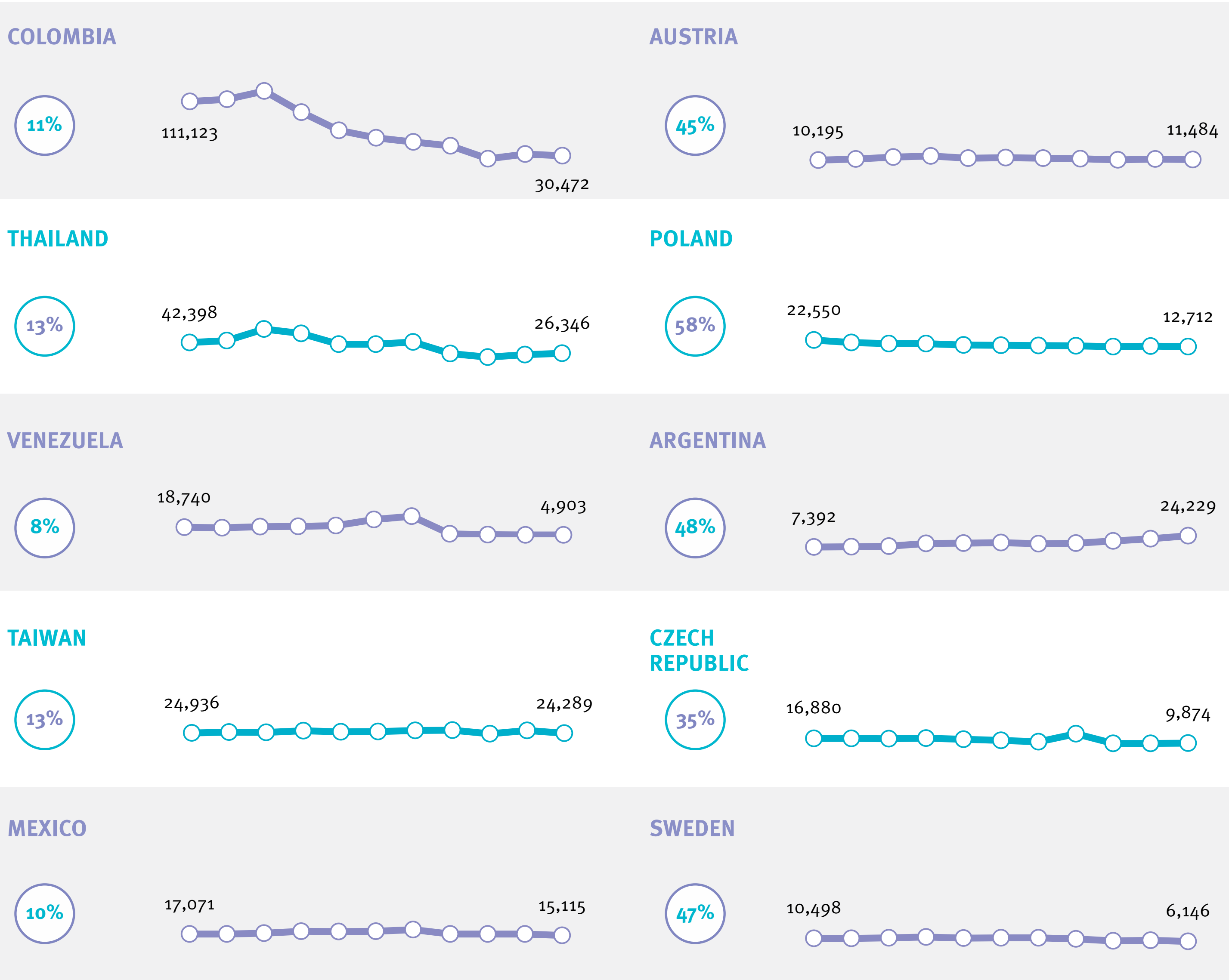
Source: English UK, 2018; (y-o-y changes are based on a sample of 347 providers reporting in both 2017 and 2018 to provide a like-for-like comparison)

PRIVATE SECTOR MEMBER CENTRES

SOURCE MARKETS

Chart 18: Performance of selected source markets (student weeks, private sector, 2008-2018) and the UK's estimated market share (2017)





Source: English UK, 2008-2018, BONARD, 2018

NOTES

ENGLISH UK

Prepared by

BONARD