THE UK IN THE GLOBAL CONTEXT

The global ELT market is fast maturing. Increasing levels of proficiency (through in-source country provision, the emergence of non-traditional destinations such as the Philippines and Malaysia and the rise of online learning) as well as shifts in demand are among the key factors contributing to change in the sector.

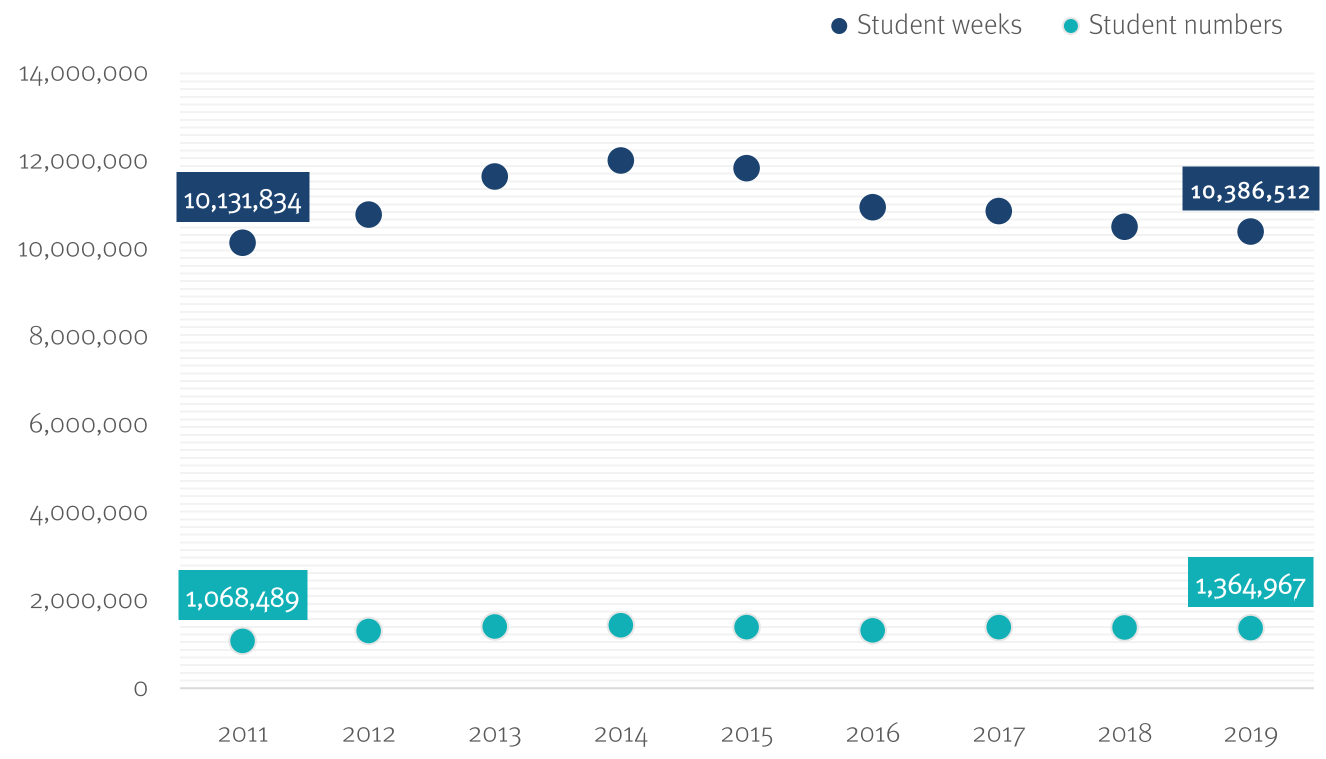
In 2019, approximately 1.36 million students travelled abroad to learn English in one of the eight major destinations (Australia, Canada, Ireland, Malta, New Zealand, South Africa, the UK and the USA). Cumulatively, these students generated 10.39 million student weeks. Due to shorter stays by adult students as well as the growing proportion of under-18s, student week volume has gradually decreased since 2014.

As demand for studying English abroad levels off, the competition between destinations intensifies. Consequently, developments in the global market resemble a zero-sum game, where destinations grow at one another's expense, usually based on the value proposition they can offer international students (e.g., course quality, work rights, etc.).

In terms of destination performance by student numbers, the UK remained the top destination for students, with an increase of 1% in 2019. Despite this development, the country saw shorter stays, with a decrease of 1.5% in student weeks and average length of stay dropping to 3.6 weeks from 3.7 weeks in 2018.

Total number of students and student weeks

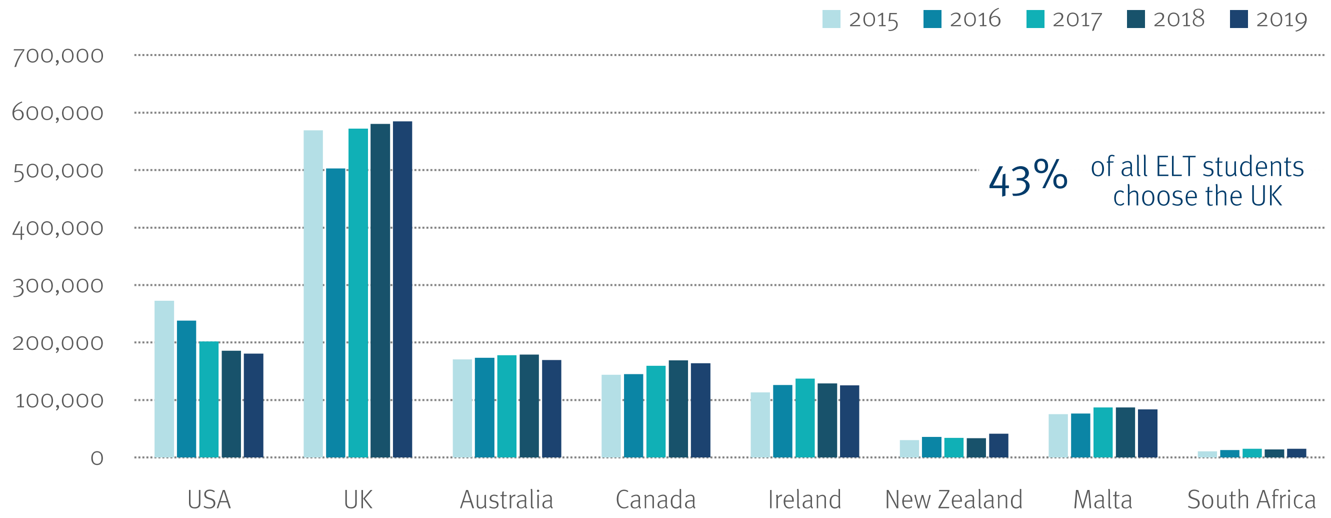
spent in major English language destinations



Source: BONARD, 2020; EduSA, 2020; English Australia, 2020; English New Zealand, 2020; English UK, 2020; Institute of International Education, 2020; Languages Canada, 2020; Marketing English in Ireland, 2020; NSO Malta, 2020; SEVIS, 2020

English language students

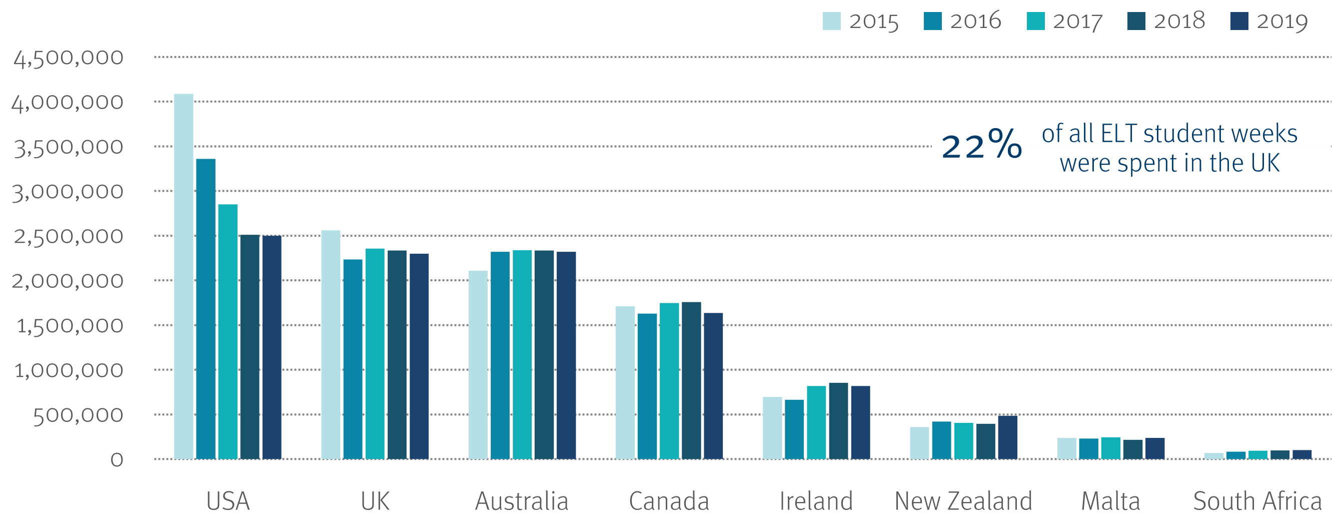
by destination



Source: BONARD, 2020; Figures represent extrapolations based on multiple sources. They cover all centres in the destinations and represent the best possible calculation, rather than a headcount. Moreover, it should be noted that as of 2019, the statistics on New Zealand include continuing students as well as group students, who were not previously included. Therefore, direct comparisons with previous years might not be possible.

Student weeks

by destination



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