

2025

student
statistics
report

English language students in the UK in 2024



BONARD

Executive summary

Student statistics report 2025 – executive summary

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Prepared on behalf of:



English UK
47 Brunswick Court, Tanner Street, London SE1 3LH, UK
+44 20 7608 7960 | www.englishuk.com | info@englishuk.com

Prepared by:

BONARD

BONARD
Museumstraße 3b/16, 1070 Vienna, Austria
+43 650 612 4527 | www.bonard.com | research@bonard.com

Introduction

In the decade since English UK first published the student statistics with BONARD, we've identified many trends as the industry matured, juniors boomed and Covid and Brexit transformed trading.

The figures generally told a clear story. But things are different now due to the changed operating environment for global English language teaching (ELT). Geo-political factors are disrupting the market. Students are finding some traditional destinations less welcoming and either swapping allegiances or studying closer to home. Online options are more popular. Bookings are being made later. This leaves us with an uncertain outlook for UK ELT.

So, what are we doing about this? Our calls to action are clear. We will intensify our campaigning and lobbying efforts for our members and our industry, and we will further expand the scope of our market intelligence. Our industry may not be as untroubled as these statistics suggest, but with uncertainty comes opportunity. English UK is working to identify and maximise those opportunities, and to support our members in seizing them.

Jodie Gray, Chief Executive, English UK

Methodology

The core data in this report was collated from English UK annual student data submissions returned between 2014 and 2024. 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 and the sample size.

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 2023 and 2024, or 2019 and 2024).

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 309 member centres taught 349,679 English language students in 2024. Of these, 335,750 were on full-time courses (either face-to-face: 333,440 or online: 2,310) and 13,929 studied part-time (either face-to-face: 10,788 or online: 3,141).
- In 2024, the UK ELT sector recovered 72% of the student weeks and 76% of the student numbers recorded in 2019.
- 'South and South Eastern England' was the most popular region (with 312,112 student weeks), followed by London (289,152 weeks).
- The top three cities were: London (289,152 weeks), Brighton (105,314 weeks), and Bournemouth (90,217 weeks).
- The top growing source markets between 2023 and 2024 were: China (+20,129 weeks), Türkiye (+18,782 weeks), and Colombia (+6,309 weeks), based on like-for-like comparison.
- The biggest drops came from: Spain (-10,132 weeks), Italy (-9,620 weeks) and Thailand (-6,483 weeks), based on like-for-like comparison between 2023 and 2024.
- The 10,788 students studying on part-time ELT courses generated 45,619 student weeks across 84 member centres.
- The 2,310 full-time online students studied for a total of 16,966 weeks, while 3,141 part-time online students studied for 26,037 student weeks.

State sector

- Following the drop recorded in 2023, the state sector experienced a further decline between 2023 and 2024, with full-time ELT student numbers dropping by 8.9% and student weeks by 14.5%, based on like-for-like data.
- Adults continued to dominate the state sector, representing 91% of total student numbers and 99% of total student weeks.
- In 2024, students opted for longer stays, studying 9.1 weeks, on average, up from 8.4 weeks in 2023.
- China retained its position as the leading source market for the state sector (26,744 weeks), in 2024. It recorded a 6% growth in student weeks while students rose by 24%. Japan and Italy followed China (5,950 and 5,160 weeks, respectively).
- 13 of English UK's 27 state sector members also collectively taught 1,632 part-time students (+2% on 2023), who accounted for 17,987 part-time student weeks.
- The top growing markets for the state sector were Other Asia (+1,606 weeks), Pakistan (+925 weeks), and South Korea (+905 weeks).
- The biggest declines for the state sector were from Saudi Arabia (-2,901 weeks), Romania (-1,697 weeks), and Kuwait (-1,064 weeks).

Private sector

- Between 2023 and 2024, the UK private ELT sector remained stable with a slight decline of 0.7% in student numbers and 0.2% growth in student weeks, based on like-for-like comparison.
- In 2024, both adult student numbers and student weeks declined in the private sector, with numbers dropping by 8% and weeks by 2%. Adults made up 63% of all students and accounted for 36% of student weeks.
- The average length of stay in 2024 increased slightly compared to 2023. It rose by 0.1 week, to an average of 3.3 weeks.
- Despite its 5% decline in both student numbers and student weeks, Italy remained the leading source market, delivering 156,823 student weeks in 2024. Saudi Arabia ranked second (146,320 weeks), followed by Türkiye (75,761 weeks).
- A total of 9,156 part-time students were also taught by 71 of English UK's 282 private sector members, contributing 27,632 part-time student weeks.
- The top growing markets for the private sector were China (+19,381 weeks), Türkiye (+19,312 weeks), and Saudi Arabia (+6,608 weeks).
- The biggest declines for the private sector were from Spain (-10,104 weeks), Italy (-8,818 weeks), and Thailand (-6,062 weeks).

Overall data

English UK membership overview

Market size



298

Reporting centres
(2024 vs 2023)



309

Reporting centres
in 2024



333,440

Students

-0.5% vs 2023



1,150,255

Students weeks

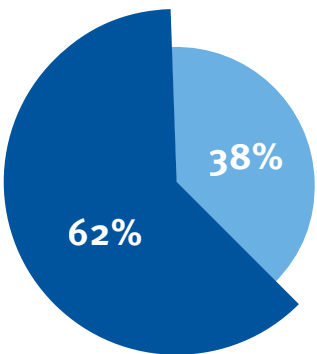
-0.9% vs 2023

Source: English UK, 2024, n=309 and English UK, 2023 and 2024, n=298; year-on-year comparisons are based on data from member centres reporting in both years

Age segments

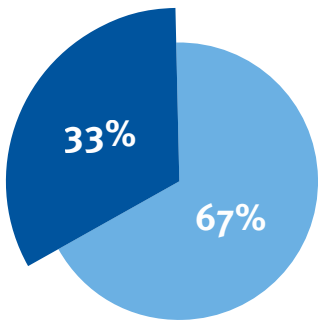
Market shares

Student numbers



Junior numbers stayed stable (0.3%), while adult numbers fell by 8%.

Student weeks

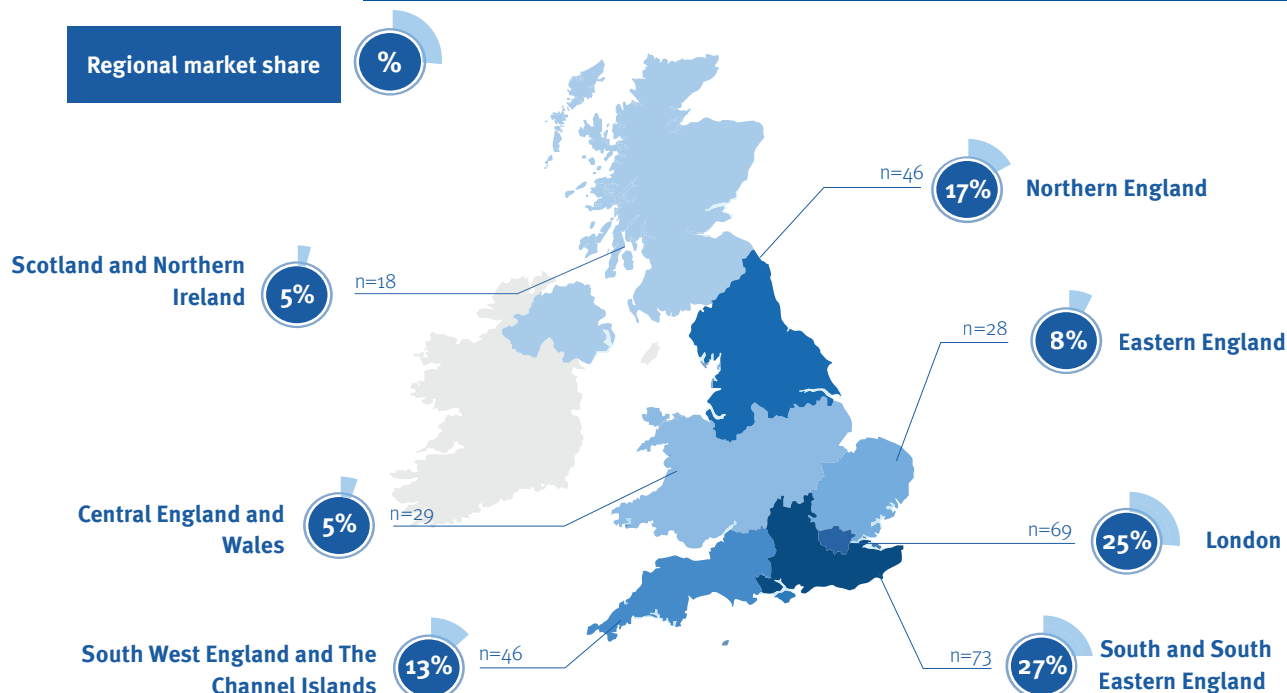


Junior weeks grew by 1%, while adult numbers dropped by 1%.

Source: English UK, 2024, n=309 and English UK, 2023 and 2024, n=298; year-on-year comparisons are based on data from member centres reporting in both years

Regional overview

Number of student weeks spent by region

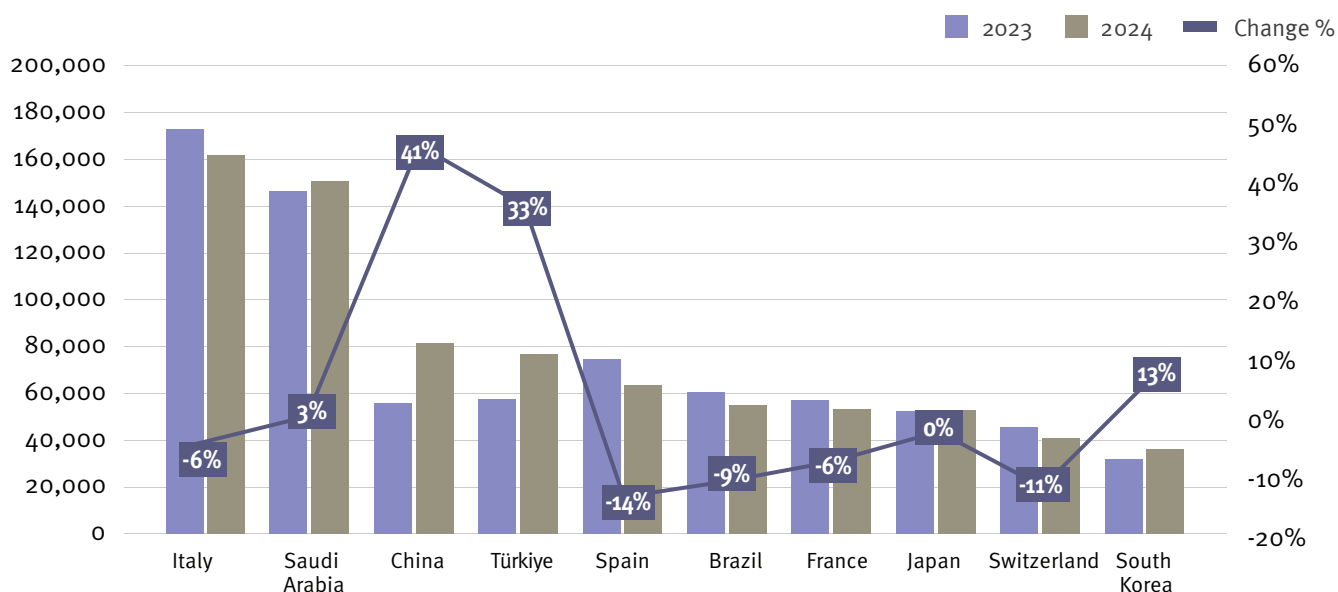


Source: English UK, 2024; n=309 member centres

Note: Percentages may not add up to 100% due to rounding. For practical reasons, English UK collects annual statistics from each member organisation rather than from individual teaching locations. Data from seasonal multi-centres is attributed to their main office (headquarters); as a result, regional figures may not fully represent where the teaching actually occurred.

Top source markets

Student weeks



Source: English UK, 2024; performance based on statistics collected from the entire sample for 2024 n=309, for 2023 n=320; year-on-year comparison is based on data from centres reporting in both 2023 and 2024 (n=298)

State sector

State sector overview

Market size



8,164

Students

-8.9% vs 2023



74,539

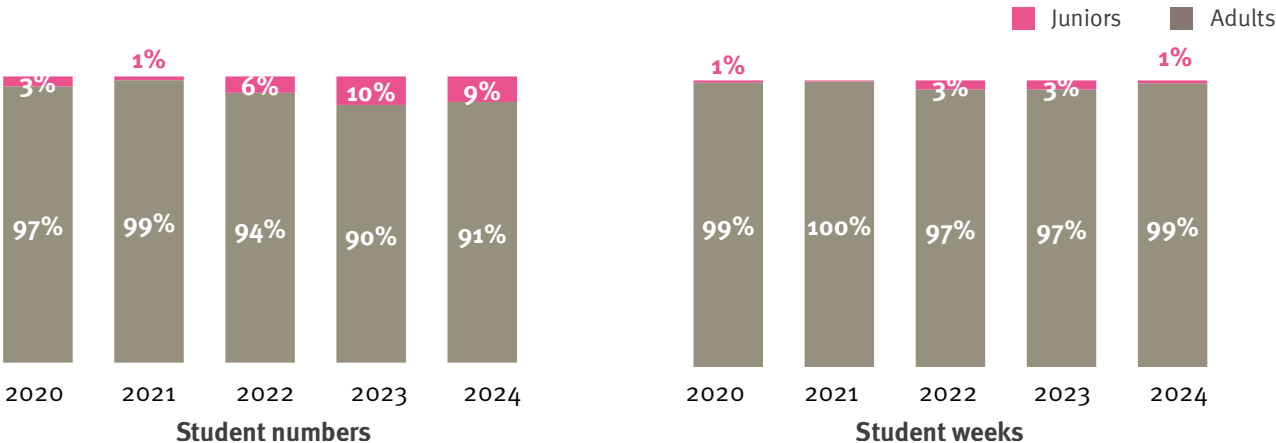
Students weeks

-14.5% vs 2023

Source: English UK, 2024, n=27 and English UK, 2023 and 2024, n=25; year-on-year comparisons are based on data from state sector member centres reporting in both years

Age segment

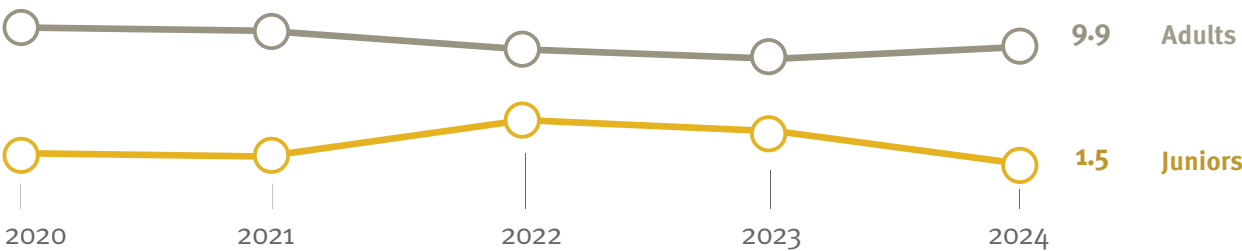
Market shares & historic trend



Source: English UK, 2020-2024; the number of state sector member centres fluctuated over the measured period, ranging between 41 and 27

Average length of stay

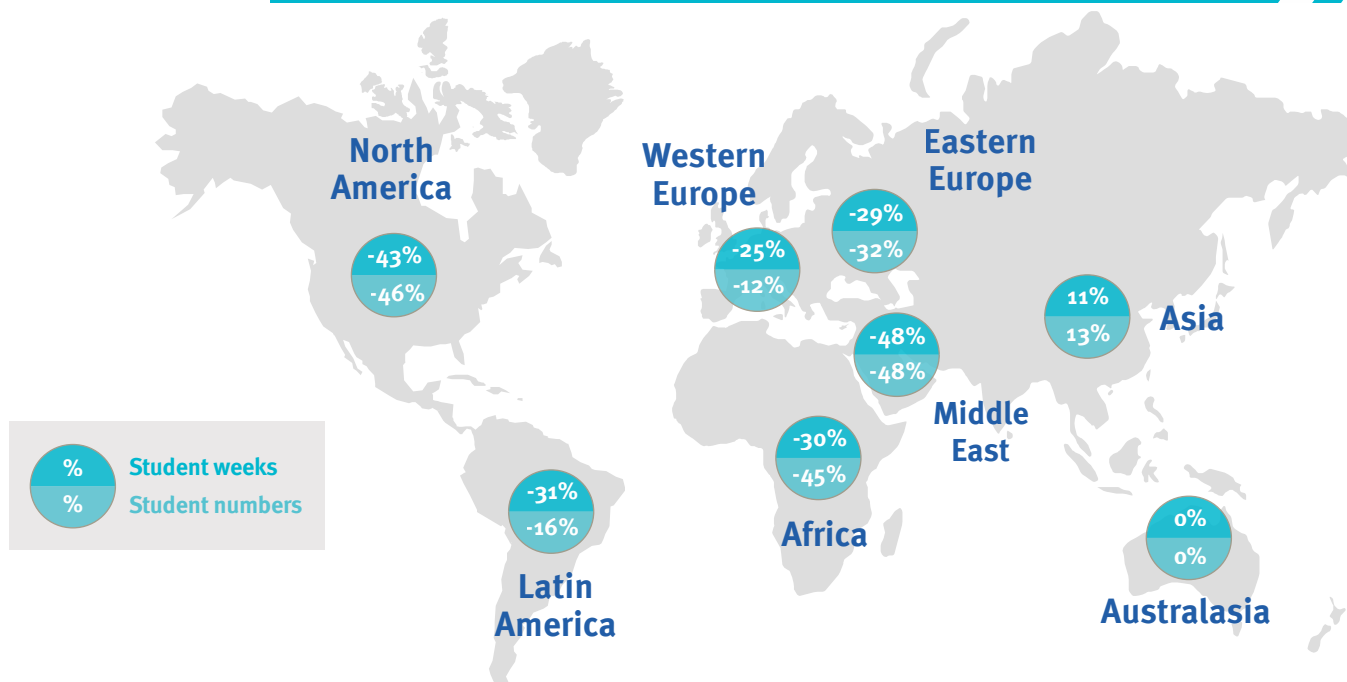
Weeks



Source: English UK, 2020-2024; the number of state sector member centres fluctuated over the measured period, ranging between 41 and 27

Source regions

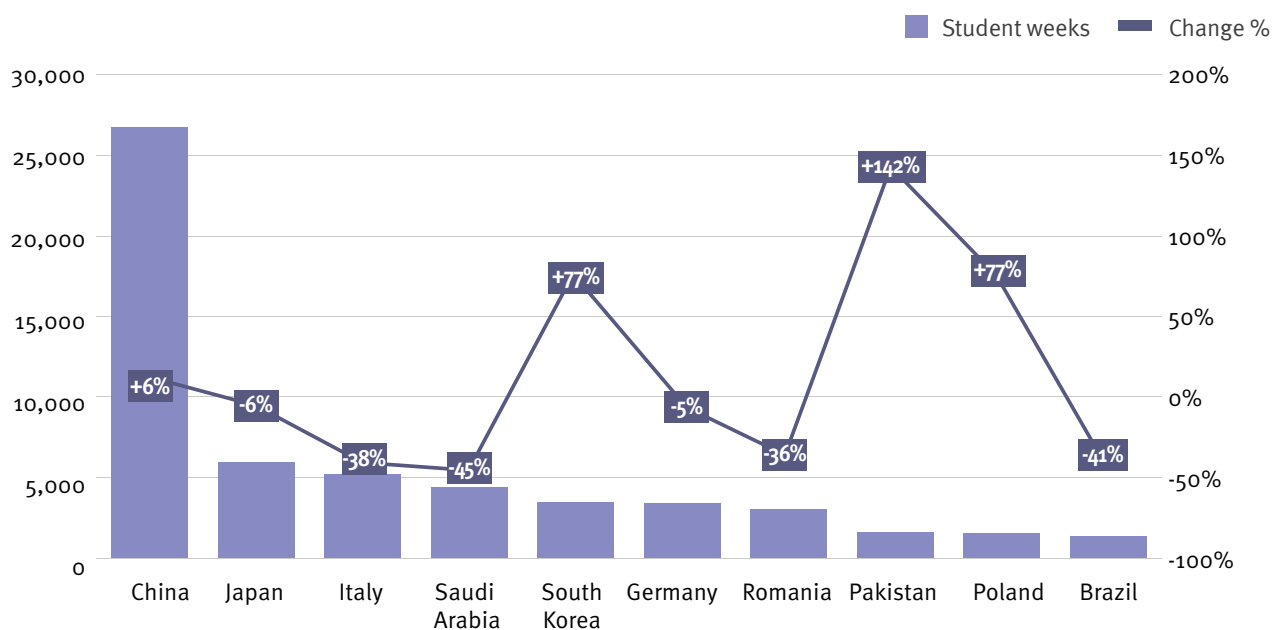
Year-on-year change (2023 vs 2024)



Source: English UK, 2020-2024; the number of state sector member centres fluctuated over the measured period, ranging between 41 and 27

Top source markets

Student weeks & year-on-year change



Source: English UK, 2024, n=27 and English UK, 2023 and 2024, n=25; year-on-year comparisons are based on data from state sector member centres reporting in both years

Private sector

Private sector overview

Market size



325,276

Students

-0.7% vs 2023



1,075,716

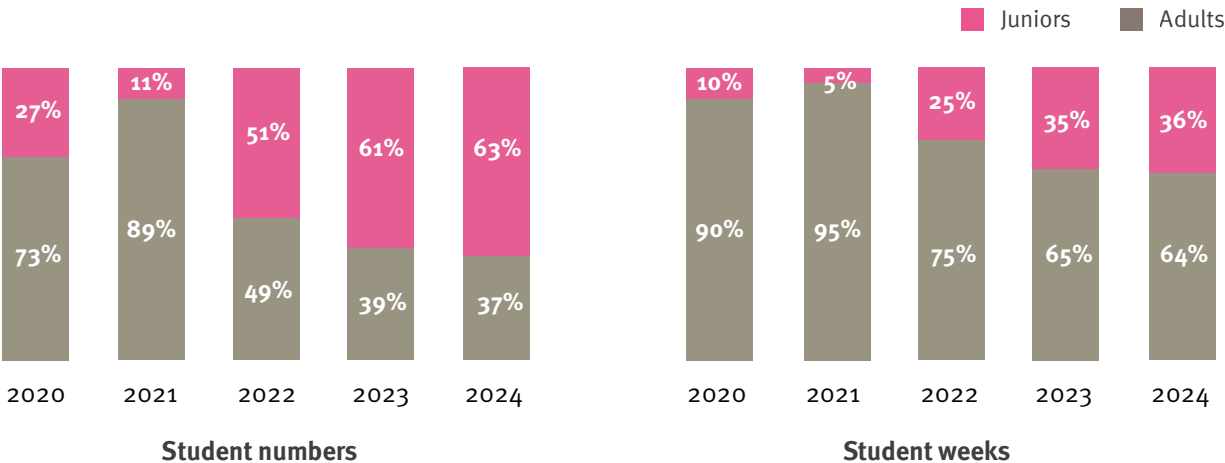
Students weeks

+0.2% vs 2023

Source: English UK, 2024, n= 282 and English UK, 2023 and 2024: year-on-year comparisons are based on data from private sector member centres reporting in both years n=273

Age segment

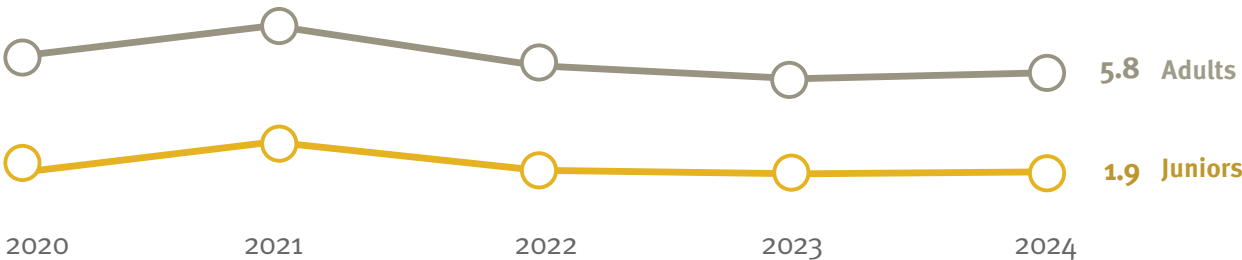
Market share & historic trend



Source: English UK, 2020 -2024; the number of private sector member centres fluctuated over the measured period, ranging between 301 and 282

Average length of stay

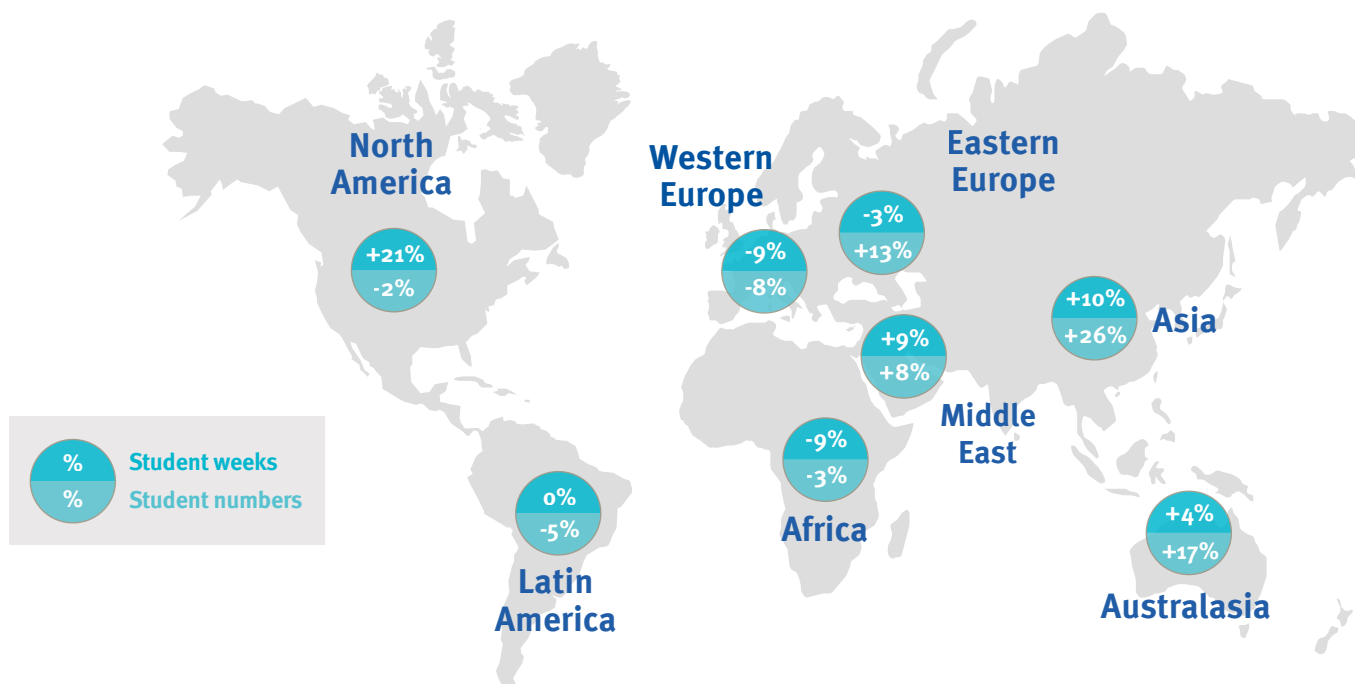
Weeks



Source: English UK, 2020 -2024; the number of private sector member centres fluctuated over the measured period, ranging between 301 and 282

Source regions

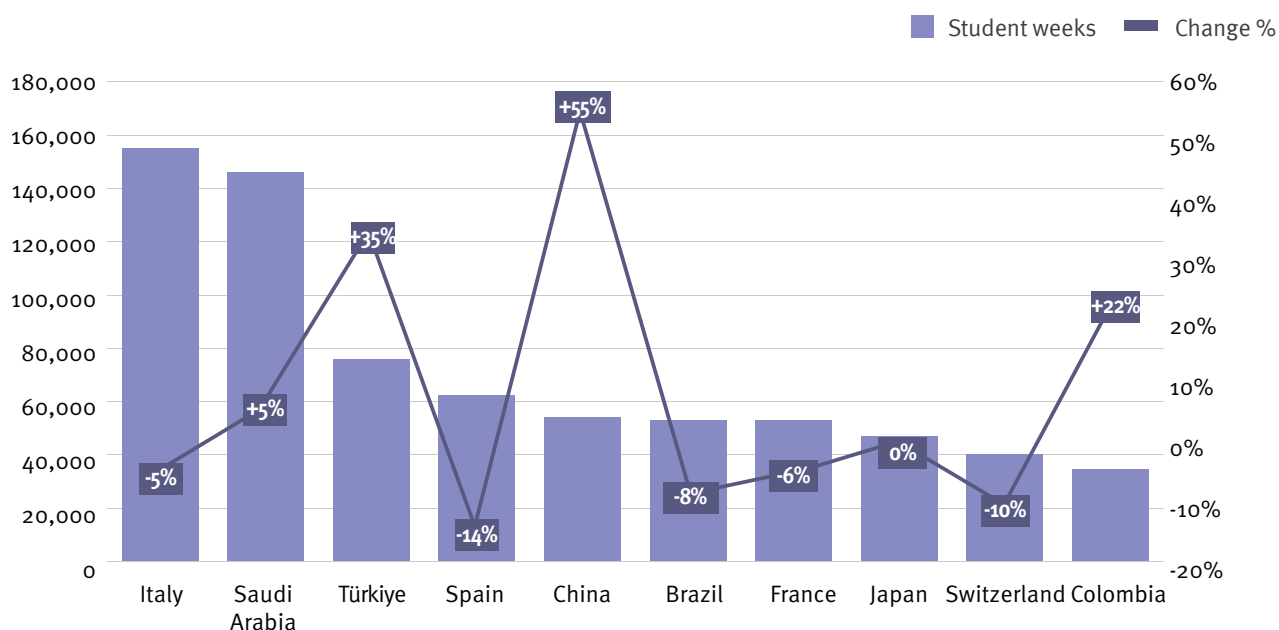
Year-on-year change (2023 vs 2024)



Source: English UK, 2023 and 2024, n=273; year-on-year comparisons are based on data from private sector member centres reporting in both years

Top source markets

Student weeks & year-on-year change



Source: English UK, 2024, n=282 and English UK, 2023 and 2024, n=273; year-on-year comparisons are based on data from private sector member centres reporting in both years

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



10,788
Students



45,619
Students weeks

9,156
Students
Private sector

27,630
Students weeks
Private sector

1,632
Students
State sector

17,989
Students weeks
State sector

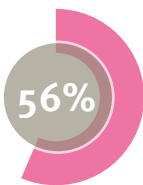
Source: English UK, 2024, n=84; based on data from only member centres with part-time students

Age segment

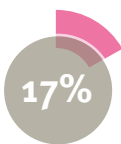
Market share

Source regions

Market share

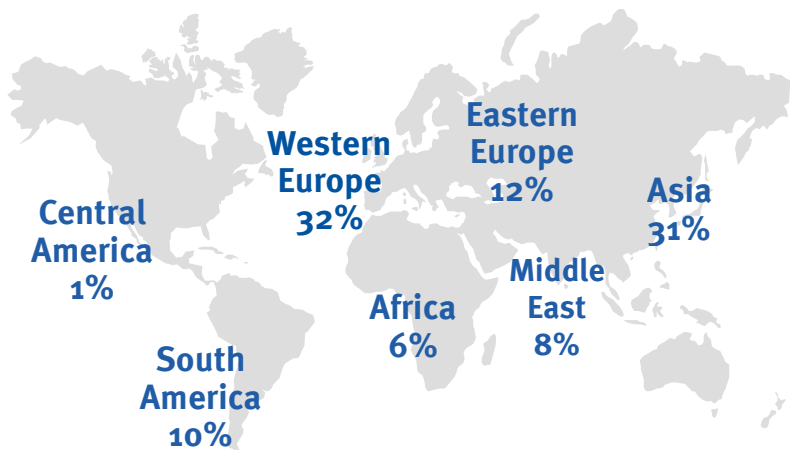


56% of all students were juniors.



17% of student weeks were spent by juniors.

Students weeks



Source: English UK, 2024, n=84; based on data from only member centres with part-time students

