

2026 student statistics report

English language students in the UK in 2025



BONARD

Student Statistics Report 2026

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Prepared on behalf of:



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Foreword

The story in this year's statistics – a 4.8% fall in student numbers and 10.9% in student weeks – will surprise few in UK ELT. Yet in a challenging global environment, the UK continues to perform comparatively well. The strong foundations and adaptability sustaining us now will underpin our future.

We have been preparing for an uncertain world shaped by geopolitics, technological change and intensifying international competition. This week, we launch two documents setting out how we will act and advocate for the future of UK ELT.

Our updated position paper calls on government to move further and faster to create a more supportive operating environment. Initiatives including the Youth Experience Scheme, ID-card group travel, the return of Erasmus+, and our role in supporting delivery of the UK Government's International Education Strategy offer renewed opportunity.

Our Strategy to 2030 focuses on four priorities: leveraging growth opportunities, improving financial sustainability, broadening our membership base and strengthening UK ELT for all.

Capturing growth is essential as global demand evolves, markets mature and competition intensifies. Centres need clear intelligence, effective routes to market and practical support to convert opportunity into business. Key opportunities lie in Latin America and Asia: last year, Türkiye and Argentina were our fastest-growing markets, while Italy remained the largest by both student numbers and weeks.

We will support members to pursue growth in new and existing markets through stronger intelligence, targeted promotion, partnerships and collaborative approaches, helping to deliver sustainable growth across the sector.

As our industry evolves, English UK will evolve with it, reinforcing our role as the champion of UK ELT and ensuring our community is well placed for what comes next.

We will support you every step of the way.

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 2025. English UK is the national membership association of accredited English language teaching (ELT) centres in the UK. Its 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 reason:

- 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 used historical comparisons based on a consistent research sample (only centres reporting in both 2024 and 2025, or in 2023, 2024 and 2025)

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 defined as international English language students on courses offering fewer than 10 teacher-taught hours per week. Information on part-time students can be found on pages 40–43.

Executive summary 2025

General overview



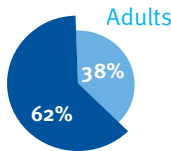
311,814
Full-time students
-4.8% vs 2024



998,044
Full-time student weeks
-10.9% vs 2024



3.2 weeks
Average length of stay



Juniors



Top 10 source markets

- Overall, English UK's 287 member centres taught 327,883 English language students in 2025. Of these, 313,954 students were on full-time courses (either face-to-face: 311,814 or online: 2,140), while 13,929 students studied part-time (either face-to-face: 11,120 or online: 2,129). These students studied for a total of 998,044 full-time student weeks and 41,576 part-time student weeks.
- 'South and South Eastern England' accounted for the largest number of student weeks (270,295 weeks), followed by London (261,551 weeks). The top three largest cities were: London (254,791 weeks), Brighton (98,149 weeks), and Bournemouth (73,962 weeks).
- The top growing markets were: Türkiye (+14,928 weeks) and Argentina (+3,734 weeks), based on like-for-like comparisons between 2024 and 2025.
- The top declining markets were: China (-23,362 weeks), Italy (-13,994 weeks), and Colombia (-13,596 weeks), based on like-for-like comparisons between 2024 and 2025.
- In the part-time sector, a total of 11,120 students were recorded, generating 41,576 student-weeks across 68 centres.
- In 2025, there were 2,140 full-time online students, accounting for 17,484 student weeks, while 2,129 part-time online students delivered 33,242 student weeks.



Source: English UK, 2025; n=287 member centres, y-o-y 2025 vs 2024, n=278

State sector



5,923

Students
-15% VS 2024



55,539

Student weeks
-22.3% VS 2024



9.0 weeks

Average
length of stay

Source: English UK, 2025; n=23 member centres, y-o-y 2025 vs 2024, n=22

- In 2025, 23 participating state sector centres delivered English language programmes (ELT) to 5,923 students, generating a combined total of 55,539 student weeks.
- Following the decline observed in 2024, when student numbers fell by 8.9% and student weeks decreased by 14.5%, the state sector experienced a continued contraction in overall activity, with student enrolments declining by 15% year-on-year.
- Adult learners continued to dominate, increasing from 91% to 93% of students in 2025. Juniors represented just 7% of the state sector's ELT students, their share of student weeks remained stable at 1%.
- China was again the leading source market, sending 2,197 students (37% of all students) who studied for 20,286 student weeks (27% of total student weeks). Japan retained second place with 796 students accounting for 4,857 student weeks.
- The largest state-sector declines were from China (-6,359 weeks), Other Asia / Far East (-2,114 weeks), and Italy (-2,080 weeks), based on like-for-like comparisons between 2024 and 2025.

Private sector



305,891

Students
-4.1% VS 2024



942,505

Student weeks
-10% VS 2024



3.1 weeks

Average
length of stay

Source: English UK, 2025; n=264 member centres, y-o-y 2025 vs 2024, n=256

- English UK's 264 private sector member centres delivered 942,505 weeks of face-to-face ELT courses to 305,891 full-time students in 2025.
- The overall average course duration was 3.1 weeks, representing a slight decrease from 3.3 weeks in 2024.
- Between 2024 and 2025, the private sector centres experienced a 4.1% decrease in student numbers to 305,891. Student weeks declined more significantly by 10%.
- Junior learners dominated, accounting for 63% of the overall student population. However, adult students represented 65% of total student weeks, reflecting their relatively longer-duration average stays.
- Italy remained the largest source market with 142,565 student weeks and 80,407 students reported in 2025. Despite declines Saudi Arabia retained second place, experiencing a relatively moderate reduction of 6% in student weeks and 3% in student numbers.
- The largest private-sector declines were from China (-16,750 weeks), Colombia (-13,545 weeks), and Italy (-11,676 weeks).

The UK at a glance

This section of the report examines data on full-time English language students in the UK in 2025. For figures relating to part-time students, please refer to pages 40–43, and for data on online students, see pages 44–45.

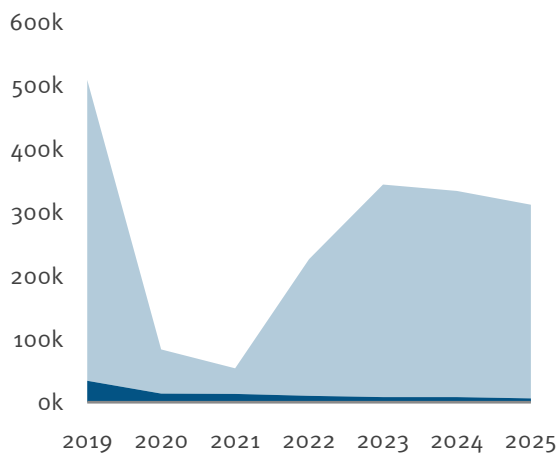
In 2025, English UK’s membership comprised 290 centres, of

which 287 submitted data for this edition of the report.

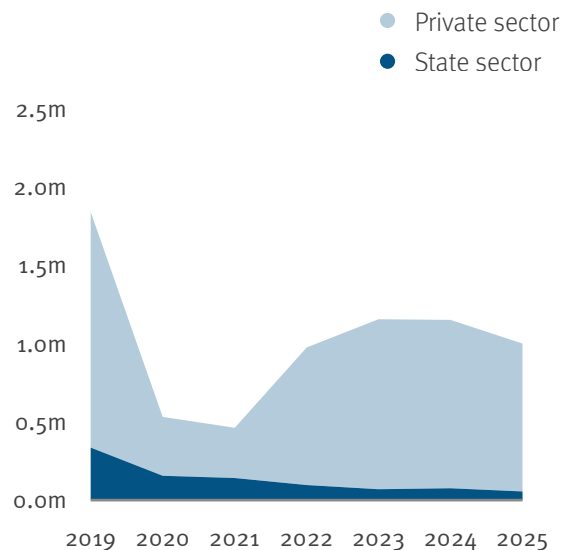
English UK member centres welcomed a total of 311,814 students. After two consecutive years exceeding one million student weeks, total volume fell just below this threshold in 2025, reaching 998,044 student weeks.

Chart 1: Overall number of students (2020-2025) and student weeks (2020-2025) taught by English UK member centres

Student numbers



Student weeks



Source: English UK, 2020–2025

Note: Based on absolute figures. The number of member centres fluctuated between 341 and 287 over the measured period. Please see Chart 3 for more details.

In 2025, the private sector continued to dominate the market, accounting for 98% of total student numbers and 94% of overall student weeks, broadly maintaining the distribution observed in 2024.

In comparison, the state sector represented a relatively small share of activity, accounting for 2% of students and 6% of total student weeks.

The overall average course duration declined modestly, from 3.4 weeks in 2024 to 3.2 weeks in 2025, continuing a gradual shift towards shorter stays.

This trend was primarily driven by developments in the private sector, where the average course length decreased from 3.3 weeks in 2024 to 3.1 weeks in 2025.

Table 1: Like-for-like comparison of 2024 vs 2025

	Student numbers	Student weeks
2024 (n=278)	322,282	1,108,453
2025 (n=278)	306,719	987,287
Change (%)	-4.8%	-10.9%

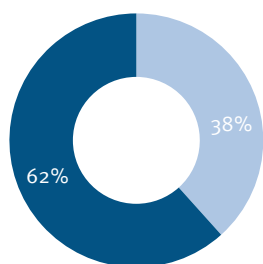
Source: English UK, 2024-2025; n=278

For a more accurate year-on-year (y-o-y), only data from centres that submitted figures for both 2024 and 2025 was included in the following analysis. Based on a like-for-like analysis, the ELT sector in the UK experienced a decline, with student numbers falling by 4.8% and student weeks decreasing by 10.9%.

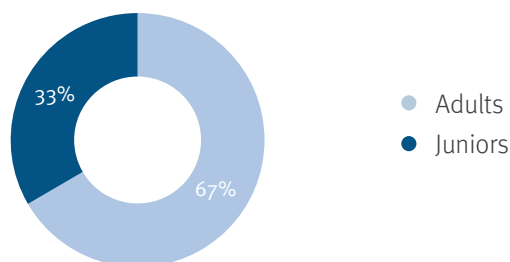
A closer examination of sector performance reveals a clear difference in trends. The private sector recorded a modest 4% decline in student numbers, while the state sector experienced a more significant drop of 15% compared to 2024. This gap widened further in terms of student weeks, which fell by 22% in the state sector, reflecting both lower enrolments and shorter stays, compared with a 10% decline in the private sector.

Chart 2: Share of adults and juniors out of the total number of students and student weeks taught by all English UK member centres

Student numbers



Student weeks



Source: English UK, 2025; n=287 member centres

Following the decline in student weeks observed in 2024, driven by the adult segment, the sector’s decline in 2025 was again primarily attributable to a decrease in the adult segment, which fell by 11% y-o-y. Centres that participated in both 2024 and 2025 reported a decline of 81,531 adult student weeks compared with 2024.

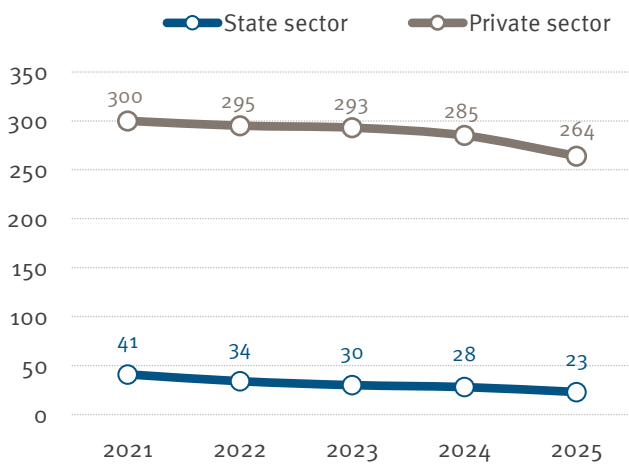
In contrast, the drop in overall student numbers was driven by the junior segment, with these centres welcoming 11,569 fewer students over the measured period.

The largest decrease in junior student numbers was recorded among members located in the South and South East of England (-12%).

In 2024, the overall average course duration increased for both age segments. However, in 2025, durations returned to 2023 levels, with adults averaging 5.6 weeks and the junior segment averaging 1.7 weeks.

Provider analysis

Chart 3: Number of English UK member centres by sector

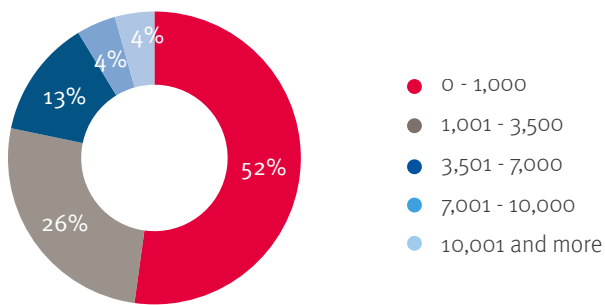


The English UK membership base comprised 290 centres in 2025, including 266 private sector centres and 24 state sector centres. Of these, 264 private sector centres and 23 state sector centres provided data for this report.

Forty-three of the private sector member centres were accredited as multi-centre providers, with 33% of these headquartered in London.

Source: English UK, 2021-2025

Chart 4: Percentage of member centres by reported volume of student weeks (state sector)



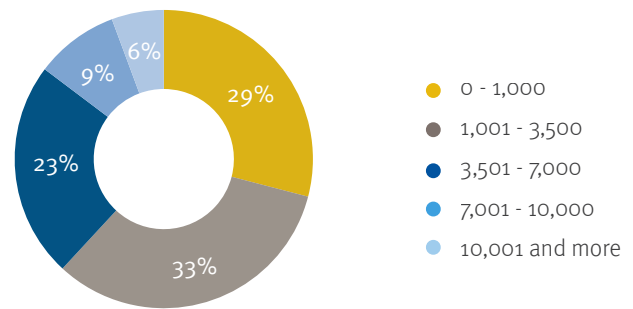
Source: English UK, 2025; n=23

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

In the state sector, the overall decline in student weeks led to a reduction in both the number and share of higher-volume centres. As a result, only 22% of centres recorded more than 3,500 student weeks in 2025 - a decrease of 7 percentage points compared with 2024.

At the same time, market concentration increased, with the five largest providers accounting for 74% of total student weeks in the state sector, up from 69% in 2024.

Chart 5: Percentage of member centres by reported volume of student weeks (private sector)

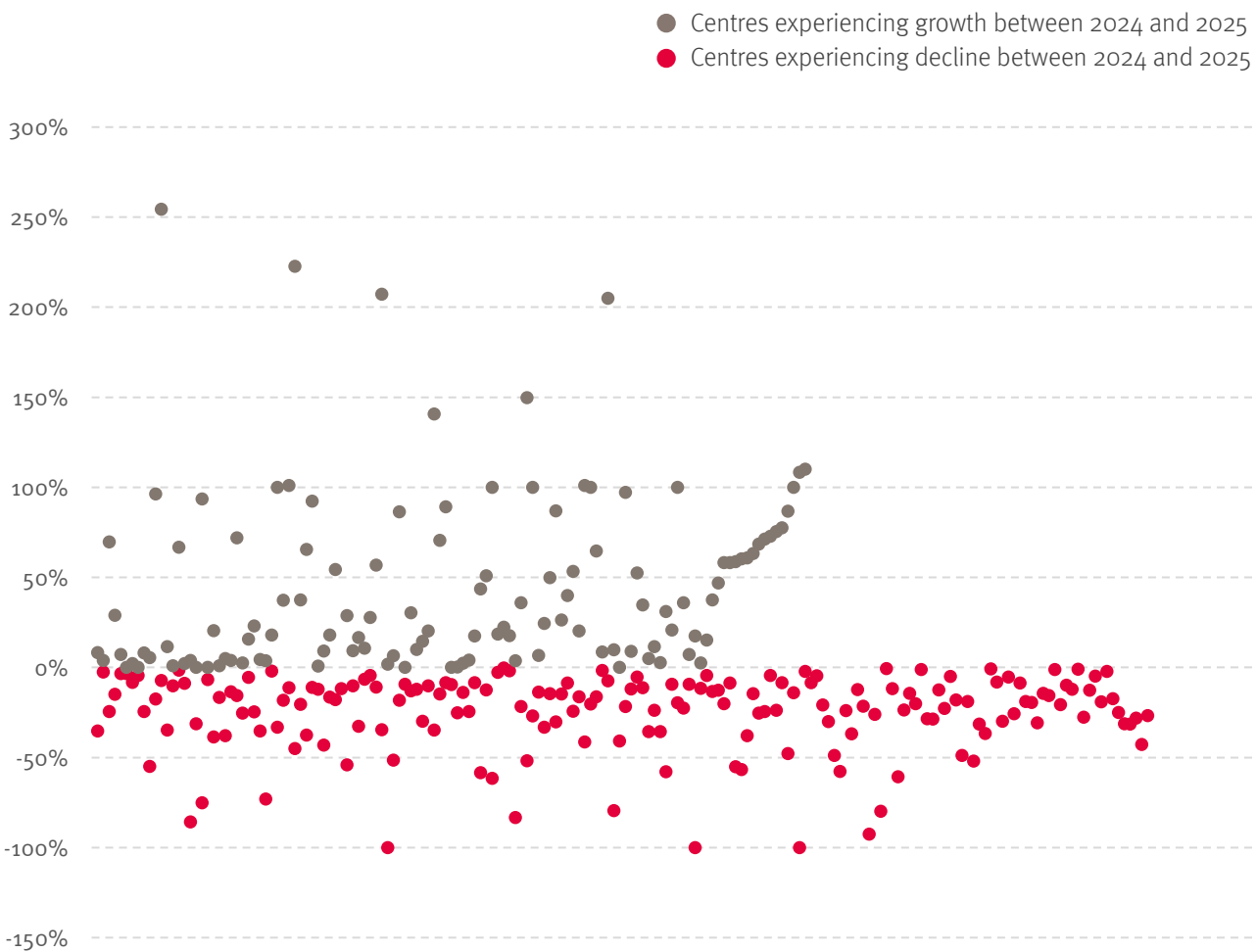


Source: English UK, 2025; n=264

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

The private sector saw a modest shift in its delivery profile in 2025, with the proportion of centres delivering between 1,001 and 3,500 student weeks increasing from 30% to 33%. At the same time, the number of larger providers delivering over 10,000 student weeks declined, while the 7,001–10,000 segment increased by 3 percentage points to 9%. Collectively, these patterns indicate a gradual rebalancing of activity towards mid-sized centres, consistent with the overall decline in total student weeks across the sector.

Chart 6: Year-on-year change of English UK membership (2024 vs 2025 levels)



Source: English UK, 2024 and 2025; n=278

The chart above presents the y-o-y performance of 278 centres that submitted comparable data for both 2024 and 2025. Performance at this individual centre level continued to show considerable variation, ranging from 254% y-o-y growth to 100% decline.

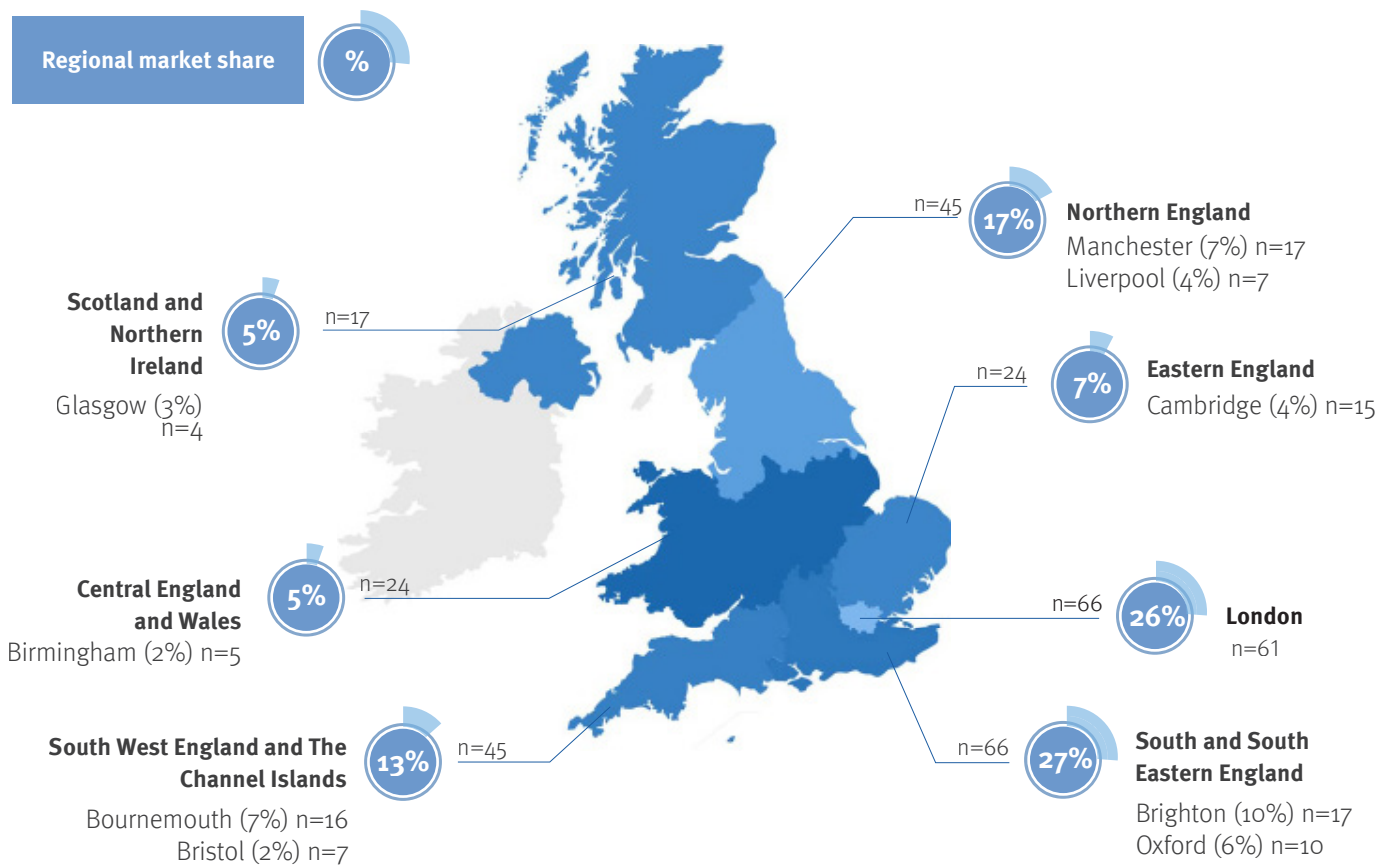
In 2024, 54% of centres recorded a decline. This proportion increased to 65% in 2025. Conversely, only 32% of centres experienced y-o-y growth between 2024 and 2025.

By sector, 65% of private sector centres recorded a decline, compared with 68% in the state sector.

The UK ELT sector remains highly volatile, with centres continuing to adjust to both external and internal pressures. External factors, including geopolitical developments, alongside internal challenges such as rising operating costs, have required providers to prioritise resilience and operational flexibility.

Regional overview

Chart 7: Regional market share (student weeks, 2025) and top ten cities with highest share of overall student weeks in 2025



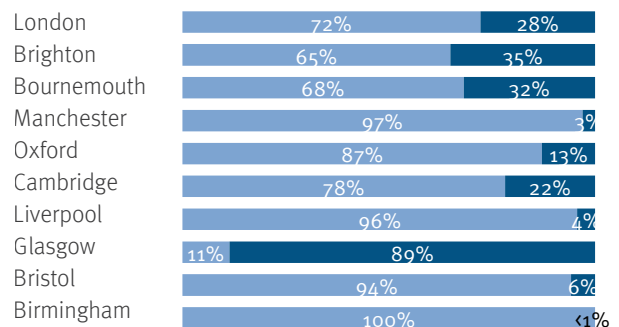
Source: English UK, 2025; n=287 member centres

Note: Data are collected at the member-organisation level and attributed to headquarters for multi-centre providers. As a result, regional figures may not fully reflect where teaching was delivered.

South and South East England continued to be the largest region, accounting for 27% of all student weeks delivered by English UK members. This is reinforced by the strong performance of established locations such as Brighton (10%) and Bournemouth (7%).

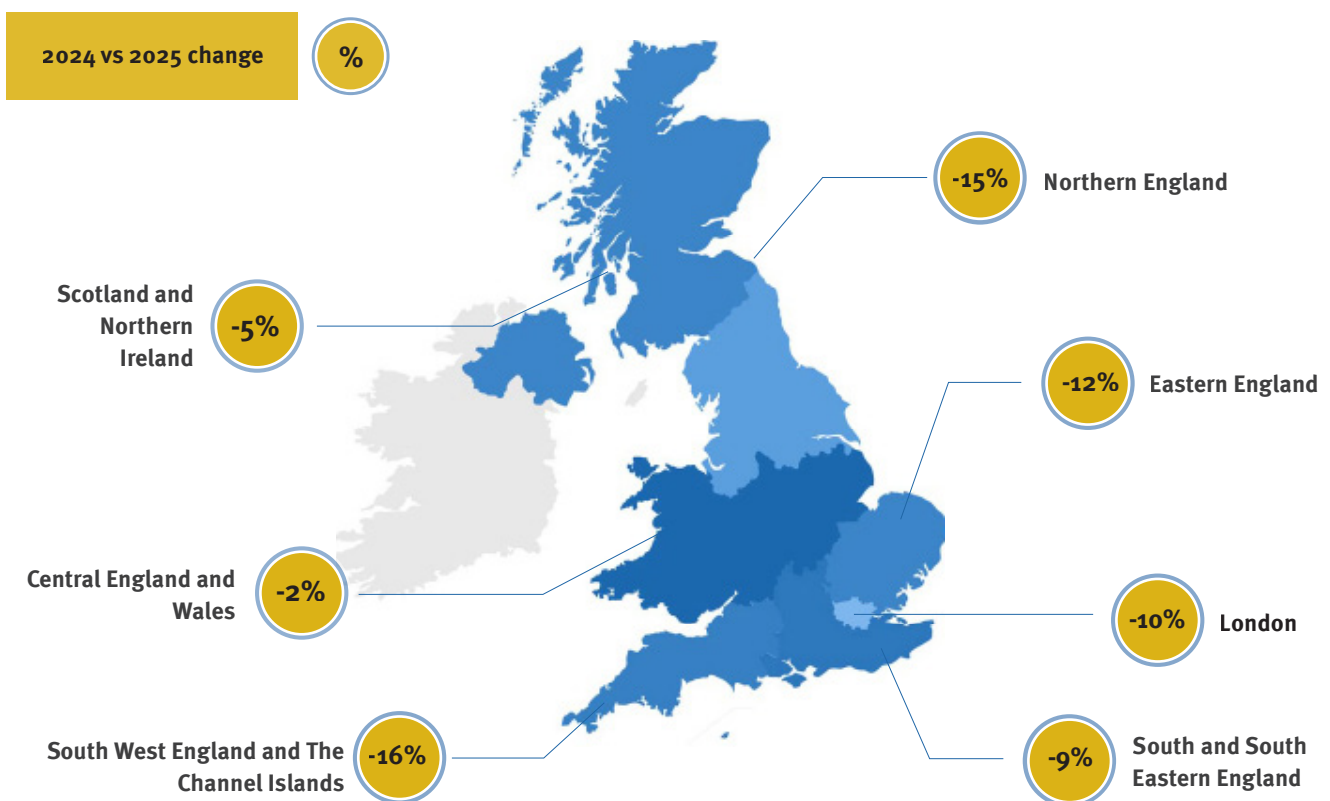
The distribution of student weeks across the top ten cities closely reflects regional demand patterns. London remained the dominant destination, accounting for 26% of all student weeks (254,791).

Chart 8: Top ten cities – age group distribution (ranked by overall student week volume)



Source: English UK, 2025; n=287 member centres

Chart 9: Regional 2024 vs 2025 change in overall student weeks



Source: English UK, 2024 and 2025; y-o-y 2025 vs 2024, n=278 centres reporting data in both years

Note: Data are collected at the member-organisation level and attributed to headquarters for multi-centre providers. As a result, regional figures may not fully reflect where teaching was delivered.

Manchester (7%), Liverpool (4%) and Birmingham (2%) also continued to attract significant volumes, highlighting the importance of Northern and Midlands cities despite wider regional declines.

Bristol and Birmingham entered the top ten cities by student weeks, replacing Canterbury and Eastbourne. Glasgow recorded the highest concentration of junior students, who accounted for 89% of all student weeks there.

London also saw a higher concentration of junior weeks, increasing from 25% to 28% of its total. However, this shift was

driven primarily by sharper declines in the adult segment rather than absolute growth in junior volumes.

All regions recorded year-on-year contraction, although the scale of decline varied considerably, ranging from 16% in the South West to 2% in the Central region and Wales. This marks a clear reversal from 2024, when several regions recorded growth, namely Scotland (+10%), the East (+6%), London (+2%) and the South West (+0.4%). This indicates a broader weakening in activity across the sector. In absolute terms, Northern England recorded the largest y-o-y fall in student weeks (-29,399), followed by London (-29,081).

Top source markets

Table 2: Overall student weeks, students and average length of stay (weeks) by source market (rank by student weeks)

Rank	Country	Student weeks			Student numbers			Av. stay (wks)
		2024 n=309	2025 n=282	Share %, 2025	2024 n=309	2025 n=282	Share %, 2025	2025
1	Italy	161,983	145,254	15%	81,847	80,675	26%	1.8
2	Saudi Arabia	150,702	133,025	13%	15,243	13,734	4%	9.7
3	Türkiye	76,807	89,013	9%	15,892	20,444	7%	4.4
4	Spain	63,438	57,959	6%	34,245	32,509	11%	1.8
5	China	81,367	54,232	6%	25,910	15,030	5%	3.6
6	France	53,085	46,389	5%	20,492	17,875	6%	2.6
7	Brazil	54,961	45,524	5%	13,594	11,673	4%	3.9
8	Japan	52,854	41,956	4%	10,756	9,660	3%	4.3
9	Switzerland	40,699	33,808	3%	9,821	8,892	3%	3.8
10	Germany	35,845	31,856	3%	18,629	17,129	6%	1.9
11	South Korea	36,063	31,423	3%	3,553	3,584	1%	8.8
12	Kuwait	34,712	23,678	2%	2,968	2,292	1%	10.3
13	Colombia	34,726	20,569	2%	4,021	2,273	1%	9.0
14	Argentina	16,975	19,691	2%	5,999	7,159	2%	2.8
15	Mexico	19,931	19,395	2%	4,693	4,225	1%	4.6
16	Taiwan	16,076	12,713	1%	3,933	3,135	1%	4.1
17	Chile	15,470	12,854	1%	2,659	2,384	1%	5.4
18	Oman	17,528	11,212	1%	2,006	1,497	<1%	7.5
19	Thailand	15,819	10,978	1%	3,356	2,308	1%	4.8
20	Russia	7,736	7,251	1%	2,611	2,958	1%	2.5

Source: English UK, 2025; Based on absolute figures. n= 282 for 2025, n= 309 for 2024

Note: These figures are based on data reported by member centres that provided a full nationality breakdown (n=282). Consequently, they may not be consistent with the data and sample presented on pages 8-13.

In 2025, Italy remained the largest source market in both student numbers and total student weeks. Italian students continued to opt for shorter stays, with an average duration of 1.8 weeks.

Similarly, students from Spain, alongside Italy, recorded among the shortest average durations at 1.7 weeks. While Spain ranked fourth in terms of student weeks, it sent the second-highest number of students, totaling 32,509 in 2025.

Türkiye overtook China to become the third-largest market for English UK members in terms of student weeks. Among the top 10 source markets, Argentina also recorded growth, increasing by 23% on a like-for-like basis.

Across Latin American markets, trends were mixed.

While Colombia experienced growth of 5% between 2023 and 2024, it saw a sharp decline of 40% between 2024 and 2025. This drop was largely driven by the reintroduction of visa requirements for Colombian nationals in late 2024, alongside currency volatility.

In contrast, the highest average course duration was recorded among students from Kuwait, who studied for an average of 10.3 weeks.

Overall, the top 10 source markets accounted for 86% of all student weeks among English UK members. Within this group, only Türkiye experienced notable growth, increasing by 20% y-o-y. China recorded the largest y-o-y decline, with 23,362 fewer student weeks between 2024 and 2025.

Table 3: Top 20 Source markets ranked by total student weeks (2025), with trend data from 2023–2025

Rank	Country	Student weeks			Year-on-year change (n=268)		
		2023 n=268	2024 n=268	2025 n=268	2023 vs 2024	2024 vs 2025	CAGR 2023 vs 2025
1	Italy	163,844	157,527	143,533	-6,317	-13,994	-6%
2	Saudi Arabia	134,481	137,971	129,060	3,490	-8,911	-2%
3	Türkiye	54,057	73,010	87,842	18,953	14,832	27%
4	Spain	70,881	59,813	57,141	-11,068	-2,672	-10%
5	China	51,294	76,622	53,260	25,328	-23,362	2%
6	France	54,068	51,145	46,110	-2,923	-5,035	-8%
7	Brazil	56,475	52,233	45,193	-4,242	-7,040	-11%
8	Japan	48,417	49,831	41,569	1,414	-8,262	-7%
9	Switzerland	44,090	39,528	33,467	-4,562	-6,061	-13%
10	Germany	37,309	35,091	31,779	-2,218	-3,312	-8%
11	South Korea	31,194	35,259	31,142	4,065	-4,117	0%
12	Kuwait	31,074	32,718	22,882	1,644	-9,836	-14%
13	Colombia	27,869	34,061	20,465	6,192	-13,596	-14%
14	Argentina	20,118	15,946	19,557	-4,172	3,611	-1%
15	Mexico	13,497	19,428	18,981	5,931	-447	19%
16	Taiwan	14,424	15,578	12,467	1,154	-3,111	-7%
17	Chile	13,701	14,526	12,252	825	-2,274	-5%
18	Oman	16,649	16,500	10,972	-149	-5,528	-19%
19	Thailand	20,026	13,982	10,880	-6,044	-3,102	-26%
20	Russia	6,869	6,829	7,090	-40	-261	2%

Source: English UK, 2025; Based on data reported by member centres that participated across all three years (2023, 2024, and 2025) to ensure a more accurate assessment.

While 2023 was largely characterised by post-pandemic recovery across most markets, 2024 recorded a drop, followed by a further declines across the majority of markets in 2025. In this context, the sector is increasingly shaped by emerging post-pandemic trends, with each source market following a distinct recovery trajectory and development path. These shifts reflect structural changes in demand, mobility patterns, and external factors influencing international student flows, indicating that the market has entered a new phase rather than returning to previous norms.

The following Compound Annual Growth Rate (CAGR) analysis measures the average annual rate of student week change across the 2023 - 2025 timeframe. It smooths out year-to-year fluctuations to provide a clearer view of the underlying trend. This analysis highlights a broader market contraction, with the

majority of key source markets experiencing declines.

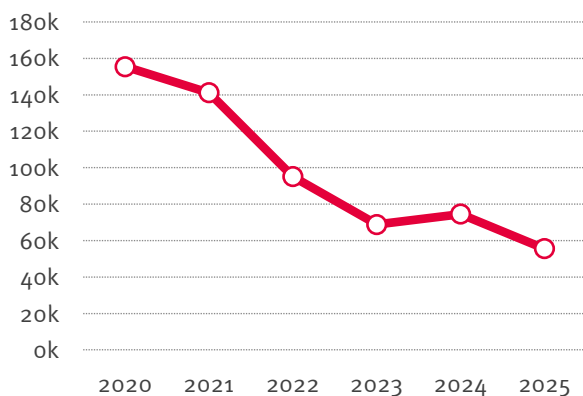
In 2024, 10 of the top 20 source markets recorded growth. However, by 2025, this momentum had significantly slowed, with only three markets: Türkiye (+27% CAGR), Mexico (+19% CAGR) and China (+2% CAGR), recording growth over the 2023–2025 period.

Notable decreases were observed in traditionally strong markets such as Spain (-10% CAGR), Italy (-6% CAGR), Germany (-8% CAGR), and South Korea (-8% CAGR), while sharper contractions were recorded in emerging and long-haul markets including Thailand (-26% CAGR), Oman (-19% CAGR), and Kuwait (-14% CAGR). Despite this, select markets such as Argentina (+1% CAGR) and Saudi Arabia (-2% CAGR) showed relative resilience compared to the wider downward trend.

State sector member centres

Market overview

Chart 10: Student weeks taught by English UK state sector member centres



Source: English UK, 2020-2025

Note: Based on absolute figures. The number of member centres fluctuated between 41 and 23 over the measured period. Please see Chart 3 for more details.

Table 4: Like-for-like comparison of 2024 vs 2025 (state sector)

	Student numbers	Student weeks
2024	6,970	71,514
2025	5,923	55,539
Change (%)	-15.0%	-22.3%

Source: English UK, 2024 and 2025; y-o-y 2025 vs 2024, n=22

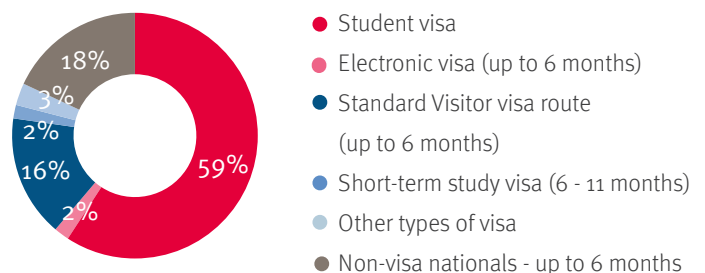
Following the decline observed in 2024 (-8.9% student numbers and -14.5% in student weeks), like-for-like analysis shows the sector experienced a continued drop, with student enrolments declining by 15% y-o-y. This reduction in volume translated into a 22.3% decrease in total student weeks.

In 2025, a total of 23 participating centres delivered English language programmes to 5,923 students, generating a combined total of 55,539 student weeks.

Of these providers, 10 operated within the further education sector, while 13 were classified as higher education institutions.

The average course duration decreased slightly, from 9.1 weeks in 2024 to 9.0 weeks in 2025.

Chart 11: Student numbers by visa type (state sector)



Source: English UK, 2025; n=23 state sector member centres
Note: Percentages may not add up to 100% due to rounding.

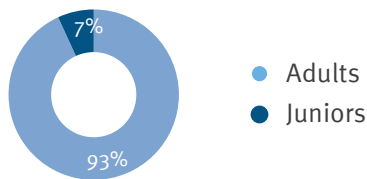
Student visas represented the largest cohort, increasing their share from 43% in 2024 to 59% in 2025. Standard visitor visas and non-visa nationals remained the second most common route, both accounting for 16% of students in the state sector. A small proportion of students (3%) entered the UK via alternative visa routes, primarily including dependant visas, refugee status, and parent-of-a-child visa arrangements.

State sector member centres

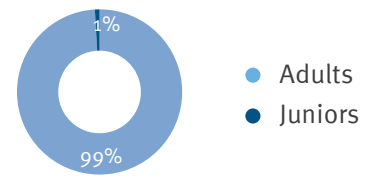
Adult vs junior segment

Chart 12: Share of adults and juniors out of the total number of students and student weeks in the UK (state sector)

Student numbers



Student weeks

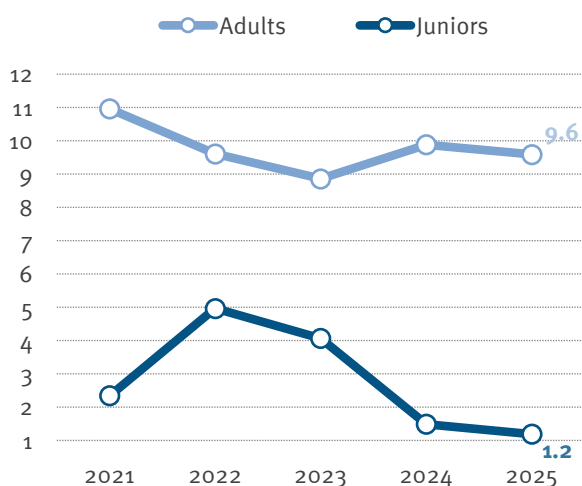


Source: English UK, 2025; n=23 state sector member centres

Overall, the data indicates a continued dominance of adult learners within state sector centres, with their share increasing from 91% to 93% in 2025.

Similarly, junior students constituted only a small proportion of student weeks spent, accounting for 1% of total weeks.

Chart 13: Average length of stay (weeks, state sector)



Source: English UK, 2021-2025

Note: The number of member centres fluctuated between 41 and 23 over the measured period. Please see Chart 3 for more details.

Course duration patterns varied significantly by source region. The longest average durations were observed among students from North America, followed by those from Africa.

At an individual market level, this variation is further pronounced. Average course lengths in 2025 were highest among students from Qatar, at 41.5 weeks (up from 26 weeks in 2024), followed by USA (33 weeks) and Other Central America (25.3 weeks).

In contrast, the shortest average durations were recorded for students from Spain (2 weeks), Uruguay (2.5 weeks), and Yemen (4 weeks).

State sector member centres

Source regions

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

Country/region	Student weeks		Student numbers		Av. stay (wks)	Change	
	2024 n=27	2025 n=23	2024 n=27	2025 n=23	2025	Student weeks n=22	Student numbers n=22
	Overall data					Like-for-like comparison	
Asia	44,743	34,157	4,683	3,966	8.6	-23%	-14%
Western Europe	11,531	7,135	1,911	860	8.3	-25%	-3%
Middle East	6,897	6,419	495	502	12.8	-3%	+8%
Eastern Europe	6,362	3,733	748	259	14.4	-40%	-62%
LATAM	3,425	2,212	234	219	10.1	-34%	+2%
Africa	1,439	1,831	82	115	15.9	+27%	+41%
North America	123	88	9	4	22.0	-28%	-56%
Australasia	19	0	2	0	n/a	-100%	-100%

Source: English UK, 2025; n=23 state sector member centres in 2025, n=27 state sector member centres in 2024; y-o-y 2025 vs 2024, n=22 centres reporting data in both years

While Asia was the only source region to record growth for state sector providers in 2024, this trend reversed in 2025. The region experienced the largest absolute decline in both student numbers and student weeks, with 667 fewer students and a reduction of 10,178 student weeks y-o-y.

Despite this decline, Asia remained the largest source region for the state sector, both in terms of student numbers and total student weeks, contributing 34,157 student weeks overall. Students from the region attended courses with an average duration of 8.6 weeks. Two largest source markets China and Japan accounted for 74% of all student weeks spent by students from the region.

The Middle East presented a mixed performance in 2025. While student weeks declined slightly by 3%, the UK ELT sector attracted a higher number of students from the region overall, indicating continued demand. This dynamic led to a reduction in average course duration, which fell from 13.9 weeks in 2024 to 12.8 weeks in 2025.

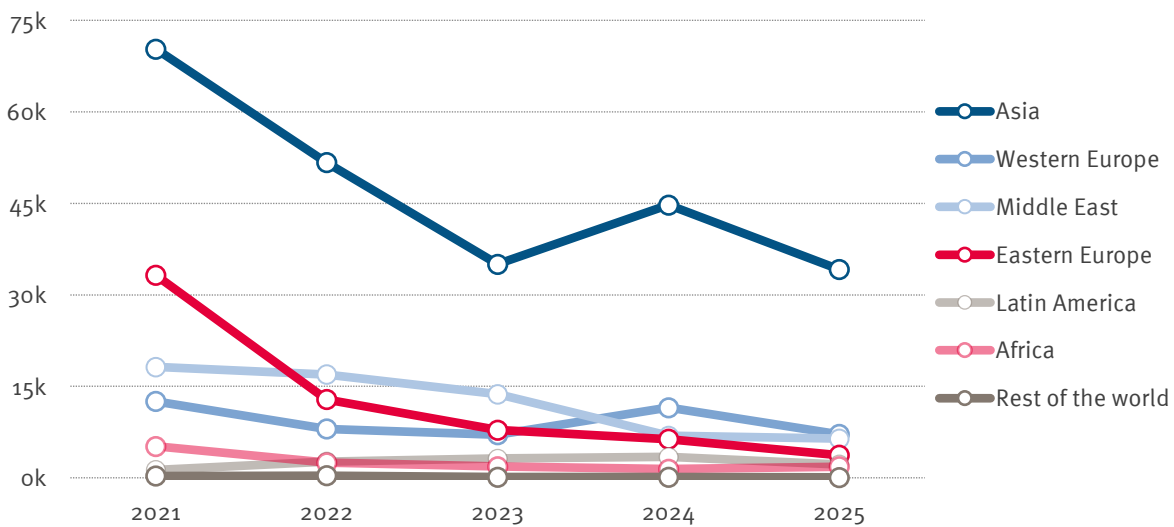
At a market level, most countries in the region experienced a drop between 2024 and 2025. However, a small number of markets, including Kuwait, Bahrain, and Iran recorded growth,

albeit on a more limited scale. A similar pattern was observed in Latin America, where student weeks declined despite an overall increase in student numbers. The decline in student weeks was driven primarily by key markets, particularly Panama and Brazil. Notably, while students from Panama contributed approximately 600 student weeks in 2024, no enrolments from this market were recorded among state sector providers in 2025.

Students from Western Europe accounted for 13% of total student weeks within the state sector, representing a decline of 25% compared to 2024. While student weeks fell by 25%, the reduction in student numbers was more moderate, decreasing by 3% y-o-y.

In contrast, Eastern Europe recorded the second largest decline in student weeks in absolute terms, with a y-o-y reduction of 2,518 weeks. This decrease was driven primarily by lower participation from key markets, notably Romania (-57.2%) and Slovakia (-50.6%).

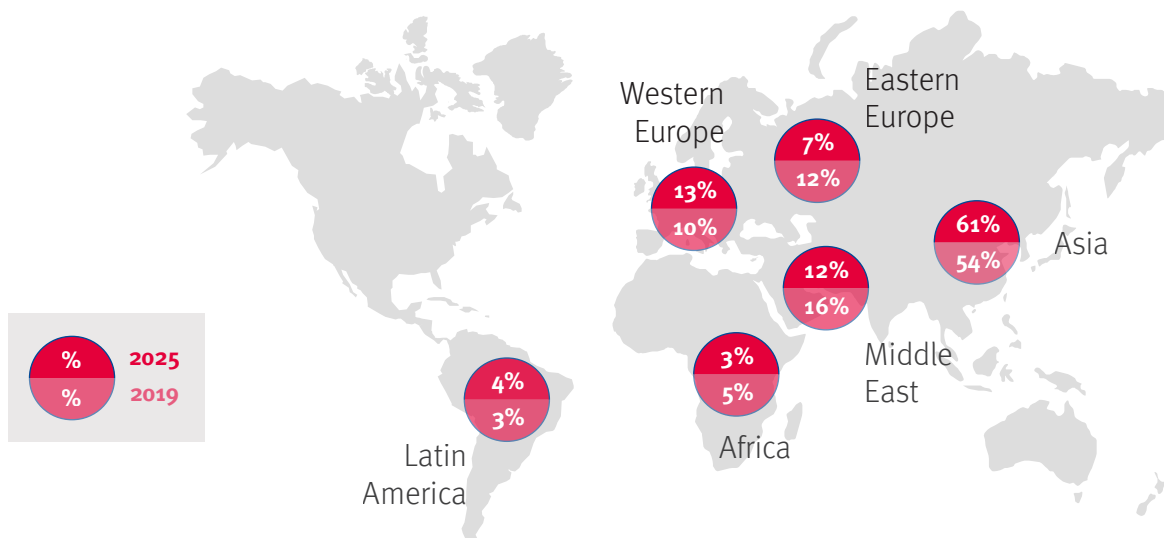
Chart 14: Student weeks by source region (2021-2025, state sector)



Source: English UK, 2021-2025

Note: Based on absolute figures. The number of state sector member centres fluctuated between 41 and 23 over the measured period. Please see Chart 3 for more details.

Chart 15: Source region market shares (UK ELT, student weeks at state sector centres, 2019 vs 2025)



Source: English UK, in 2025 n=23, in 2019 n=54

Note: Based on absolute figures. There was a fluctuation in English UK membership in these years.

State sector member centres

Source markets

Of the 114 source markets analysed, only 36 recorded growth in student weeks between 2024 and 2025, while 20 remained stable and 58 experienced a decline.

Within the state sector, the top 10 source markets accounted for 76% of total student weeks. Among these key markets, Kuwait was the only one to record y-o-y growth, contributing an

additional 1,138 student weeks compared to 2024.

China remained the largest source market by a considerable margin, accounting for 37% of all students and contributing 27% of total student weeks. Japan followed as a key market, delivering 4,857 student weeks. However, Japanese students typically undertook shorter programmes, with an average course duration

Table 6: Student weeks, students and average length of stay (weeks) by source market (rank by student weeks)

Rank	Country/region	Student weeks		Student numbers		Av. stay (wks) 2025	Change	
		2024 n=27	2025 n=23	2024 n=27	2025 n=23		Student weeks n=22	Student numbers n=22
Overall data							Like-for-like comparison	
1	China	26,744	20,286	2,854	2,197	9.2	-23.9%	-22.7%
2	Japan	5,950	4,857	791	796	6.1	-15.9%	3.0%
3	Saudi Arabia	4,382	3,350	307	227	14.8	-20.8%	-22.3%
4	Italy	5,160	2,689	465	268	10.0	-43.6%	7.6%
5	South Korea	3,426	2,447	470	407	6.0	-26.8%	-12.3%
6	Germany	3,376	2,076	499	102	20.4	-14.4%	-20.9%
7	Other Asia / Far East	3,901	1,781	180	154	11.6	-54.3%	-14.0%
8	Kuwait	715	1,762	56	161	10.9	182.4%	215.7%
9	Poland	1,501	1,296	106	95	13.6	-13.1%	-8.7%
10	Romania	3,001	1,284	195	90	14.3	-57.2%	-53.6%
11	Brazil	1,353	1,142	84	94	12.1	-15.3%	13.3%
12	Pakistan	1,576	1,036	81	66	15.7	-34.3%	-18.5%
13	Other Africa	554	867	29	47	18.4	56.5%	62.1%
14	Taiwan	989	823	103	96	8.6	-13.6%	-1.0%
15	Uzbekistan	130	803	10	58	13.8	517.7%	480.0%
16	United Kingdom	259	750	16	43	17.4	194.1%	186.7%
17	Spain	1,197	686	465	337	2.0	-28.9%	24.8%
18	Morocco	53	596	4	38	15.7	1024.5%	850.0%
19	Türkiye	1,046	543	77	50	10.9	-46.8%	-30.6%
20	Hong Kong	664	498	27	34	14.6	-24.3%	30.8%
21	Tajikistan	55	451	5	41	11.0	720.0%	720.0%
22	France	381	409	143	53	7.7	21.0%	-60.4%
23	Slovakia	748	369	25	22	16.8	-50.6%	-8.3%
24	Czechia	419	366	64	19	19.3	3.7%	18.8%
25	Thailand	475	322	69	42	7.7	-29.5%	-36.4%

- **Overall data** – performance of source markets based on statistics collected from the entire sample (27 in 2024 and 23 in 2025);
- **Like-for-like comparison** – y-o-y benchmark based on data from centres reporting in both 2024 and 2025 (22 centres) for a more accurate assessment of source market performance trends.

of 6.1 weeks in 2025. In contrast, the long average course duration of Saudi Arabian students (14.8 weeks) positioned Saudi Arabia as the third largest market by student weeks, surpassing Italy despite lower overall student numbers.

From a student numbers perspective, South Korea ranked as the third largest source market, but, similar to Japan, was

characterised by short average course durations of around six weeks.

Central Asia emerged as a growing source region, with increased contributions particularly from Uzbekistan, Tajikistan, and Kazakhstan, which delivered 673, 396, and 115 student weeks respectively.

Table 6: Student weeks, students and average length of stay (weeks) by source market (rank by student weeks) cont.

Rank	Country/region	Student weeks		Student numbers		Av. stay (wks)	Change	
		2024 n=27	2025 n=23	2024 n=27	2025 n=23	2025	Student weeks n=22	Student numbers n=22
						Overall data		
						Like-for-like comparison		
26	Chile	402	296	21	20	14.8	-25.3%	0.0%
27	Argentina	422	293	47	55	5.3	-23.3%	61.8%
28	India	207	237	22	22	10.8	20.9%	22.2%
29	Vietnam	287	227	18	21	10.8	-20.9%	16.7%
30	Iraq	173	222	13	19	11.7	28.3%	46.2%
31	Oman	148	170	15	17	10.0	14.9%	13.3%
32	Kazakhstan	50	165	5	14	11.8	230.0%	180.0%
33	Ecuador	237	160	11	9	17.8	-31.9%	-10.0%
34	Belgium	219	142	20	10	14.2	-33.3%	-44.4%
35	Switzerland	378	124	108	27	4.6	-2.4%	42.1%
36	Algeria	31	120	3	10	12.0	287.1%	233.3%
37	Egypt	132	110	10	10	11.0	-16.7%	0.0%
38	Netherlands	334	89	126	9	9.9	-60.6%	-52.6%
39	Qatar	131	83	5	2	41.5	-36.6%	-60.0%
40	Portugal	13	82	1	5	16.4	530.8%	400.0%
41	Peru	6	77	2	10	7.7	1825.0%	900.0%
42	Other Central America	11	76	3	3	25.3	590.9%	0.0%
	Russia	36	76	5	7	10.9	117.1%	75.0%
44	Iran	71	75	5	8	9.4	23.0%	100.0%
45	Jordan	44	71	5	5	14.2	153.6%	66.7%
46	Mexico	224	70	14	10	7.0	-68.8%	-28.6%
47	Cyprus	8	68	1	3	22.7	750.0%	200.0%
48	Azerbaijan	12	66	2	6	11.0	450.0%	200.0%
	USA	90	66	6	2	33.0	-26.7%	-66.7%
50	Libya	57	52	3	5	10.4	-8.8%	33.3%

- **Overall data** – performance of source markets based on statistics collected from the entire sample (27 in 2024 and 23 in 2025);
- **Like-for-like comparison** – y-o-y benchmark based on data from centres reporting in both 2024 and 2025 (22 centres) for a more accurate assessment of source market performance trends.

State sector member centres

Source markets

Table 6: Student weeks, students and average length of stay (weeks) by source market (rank by student weeks)

Rank	Country/region	Student weeks		Student numbers		Av. stay (wks)	Change		
		2024 n=27	2025 n=23	2024 n=27	2025 n=23	2025	Student weeks n=22	Student numbers n=22	
		Overall data				Like-for-like comparison			
	Bulgaria	66	52	5	6	8.7	-20.0%	50.0%	
52	Ukraine	217	52	305	3	17.3	-76.0%	-99.0%	
53	Georgia	0	47	0	2	23.5	100.0%	100.0%	
	Paraguay	47	47	15	10	4.7	0.0%	-33.3%	
	Singapore	0	44	0	3	14.7	100.0%	100.0%	
	Mongolia	15	44	2	4	11.0	193.3%	100.0%	
57	Angola	6	42	1	2	21.0	600.0%	100.0%	
58	Greece	16	41	3	3	13.7	156.3%	0.0%	
59	Moldova	26	36	2	2	18.0	38.5%	0.0%	
	United Arab Emirates	73	36	5	3	12.0	-42.9%	-25.0%	
61	Nigeria	585	33	29	2	16.5	-94.4%	-93.1%	
62	Bahrain	24	32	1	3	10.7	33.3%	200.0%	
63	Hungary	73	29	12	4	7.3	-58.6%	-60.0%	
64	Estonia	34	24	1	1	24.0	-29.4%	0.0%	
	Denmark	37	24	1	1	24.0	-35.1%	0.0%	
	Lithuania	53	24	4	2	12.0	-53.8%	-33.3%	
	Latvia	67	24	6	2	12.0	-64.2%	-66.7%	
68	Palestine	14	23	1	1	23.0	64.3%	0.0%	
	Colombia	110	23	11	2	11.5	-65.7%	-75.0%	
70	Belarus	0	22	0	2	11.0	100.0%	100.0%	
71	Syria	42	21	3	2	10.5	-50.0%	-33.3%	
72	Venezuela	13	18	1	2	9.0	38.5%	100.0%	
73	Other Middle East	0	12	0	1	12.0	100.0%	100.0%	
	Sweden	30	12	2	1	12.0	-60.0%	-50.0%	
75	Canada	0	11	0	1	11.0	100.0%	100.0%	
	Finland	0	11	0	1	11.0	100.0%	100.0%	
	Lebanon	0	11	0	1	11.0	100.0%	100.0%	
	Tunisia	21	11	3	1	11.0	-47.6%	-66.7%	
	Albania	26	11	1	1	11.0	-57.7%	0.0%	
	Malaysia	27	11	2	1	11.0	-59.3%	-50.0%	
	Other North America	33	11	3	1	11.0	-66.7%	-66.7%	
82	Uruguay	0	10	0	4	2.5	100.0%	100.0%	

- i** • **Overall data** – performance of source markets based on statistics collected from the entire sample (27 in 2024 and 23 in 2025);
- **Like-for-like comparison** – y-o-y benchmark based on data from centres reporting in both 2024 and 2025 (22 centres) for a more accurate assessment of source market performance trends.

Table 6: Student weeks, students and average length of stay (weeks) by source market (rank by student weeks) cont.

Rank	Country/region	Student weeks		Student numbers		Av. stay (wks) 2025	Change	
		2024 n=27	2025 n=23	2024 n=27	2025 n=23		Student weeks n=22	Student numbers n=22
Overall data							Like-for-like comparison	
83	Yemen	34	8	2	2	4.0	-76.5%	0.0%
84	Macao	21	6	2	1	6.0	-71.4%	-50.0%
	Indonesia	157	6	34	1	6.0	-96.2%	-97.1%
86	Iceland	79	0	33	0	n/a	-100.0%	n/a
	Armenia	0	0	0	0	n/a	n/a	n/a
	Kyrgyzstan	0	0	0	0	n/a	n/a	n/a
	Bolivia	0	0	0	0	n/a	n/a	n/a
	Costa Rica	0	0	0	0	n/a	n/a	n/a
	Slovenia	27	0	14	0	n/a	n/a	n/a
	Bosnia and Herzegovina	0	0	0	0	n/a	n/a	n/a
	Macedonia	0	0	0	0	n/a	n/a	n/a
	Montenegro	0	0	0	0	n/a	n/a	n/a
	Other South America	0	0	0	0	n/a	n/a	n/a
	Other Eastern Europe	0	0	0	0	n/a	n/a	n/a
	Serbia	0	0	0	0	n/a	n/a	n/a
	Ireland	0	0	0	0	n/a	n/a	n/a
	Israel	0	0	0	0	n/a	n/a	n/a
	Liechtenstein	0	0	0	0	n/a	n/a	n/a
	Luxembourg	0	0	0	0	n/a	n/a	n/a
	Monaco	0	0	0	0	n/a	n/a	n/a
	Norway	0	0	0	0	n/a	n/a	n/a
	Other Australasia	0	0	0	0	n/a	n/a	n/a
	Other Western Europe	0	0	0	0	n/a	n/a	n/a
	Turkmenistan	2	0	1	0	n/a	-100.0%	-100.0%
	Cambodia	14	0	2	0	n/a	-100.0%	-100.0%
	Nepal	4	0	1	0	n/a	-100.0%	-100.0%
	Australia	8	0	1	0	n/a	-100.0%	-100.0%
	New Zealand	11	0	1	0	n/a	-100.0%	-100.0%
	Philippines	37	0	2	0	n/a	-100.0%	-100.0%
	Austria	52	0	29	0	n/a	-100.0%	-100.0%
	Croatia	60	0	2	0	n/a	-100.0%	-100.0%
	Panama	600	0	25	0	n/a	-100.0%	-100.0%

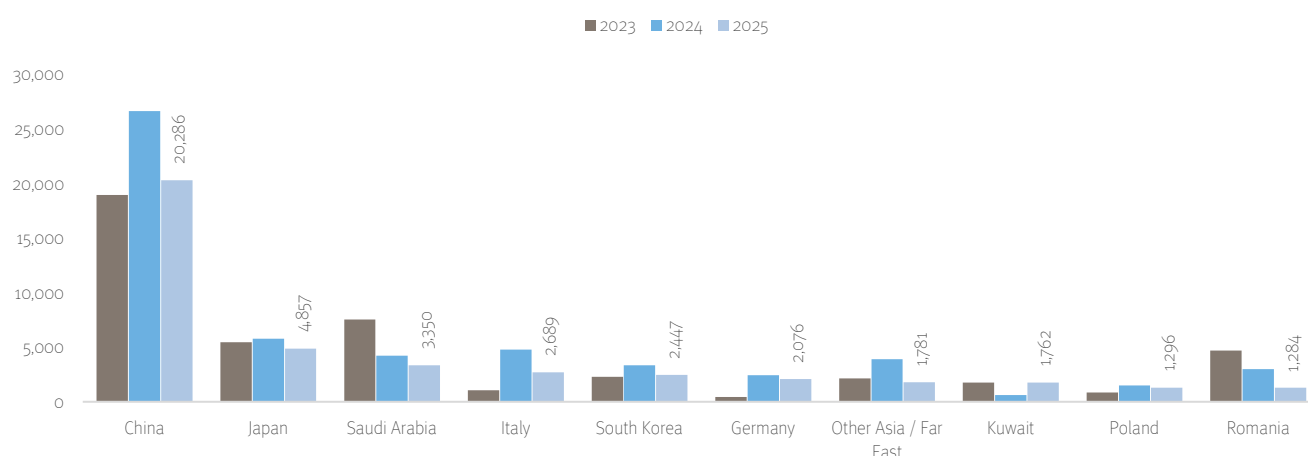
- Overall data** – performance of source markets based on statistics collected from the entire sample (27 in 2024 and 23 in 2025);
- Like-for-like comparison** – y-o-y benchmark based on data from centres reporting in both 2024 and 2025 (22 centres) for a more accurate assessment of source market performance trends.

Source: English UK, 2025

State sector member centres

Source markets

Chart 16: Top 10 Source markets ranked by student weeks (like-for-like, 2025), with trend data from 2023–2025



Source: English UK, 2023-2025; n=22 member centres

Note: Based on data reported by member centres that participated across all three years (2023, 2024, and 2025) to ensure a more accurate assessment. Consequently, these figures may not be consistent with the data presented on pages 20–23.

Table 7: Source markets trend data from 2023–2025 and like-to-like change

Rank	Country	Student weeks			Year-on-year change (n=22)		
		2023 n=22	2024 n=22	2025 n=22	2023 vs 2024	2024 vs 2025	CAGR 2023 vs 2025
1	China	18,936	26,645	20,286	41%	-24%	4%
2	Japan	5,461	5,776	4,857	6%	-16%	-6%
3	Saudi Arabia	7,522	4,231	3,350	-44%	-21%	-33%
4	Italy	1,042	4,769	2,689	358%	-44%	61%
5	South Korea	2,288	3,342	2,447	46%	-27%	3%
6	Germany	437	2,424	2,076	455%	-14%	118%
7	Other Asia / Far East	2,128	3,895	1,781	83%	-54%	-9%
8	Kuwait	1,752	624	1,762	-64%	182%	0%
9	Poland	834	1,492	1,296	79%	-13%	25%
10	Romania	4,697	2,999	1,284	-36%	-57%	-48%

Source: English UK, 2023-2025; n=22 member centres

Note: Based on data reported by member centres that participated across all three years (2023, 2024, and 2025) to ensure a more accurate assessment. Consequently, these figures may not be consistent with the data presented on pages 20–23.

China remained the largest source market by a considerable margin. However, after strong growth in 2024 (+41%), student weeks declined by 24% in 2025. Similar patterns were observed across several key markets, including Japan, South Korea and Other Asia/Far East, where gains in 2024 were followed by contractions in 2025. Italy and Germany showed particularly sharp volatility, with substantial increases between 2023 and 2024

(+358% and +455%, respectively) before declining in 2025 (-44% and -14%), suggesting a rebound from a low base rather than sustained growth.

Saudi Arabia, by contrast, followed a consistent downward trajectory. Kuwait stood out as an exception, recording strong growth in 2025 (+182%) after a decline in 2024.

Table 8: Top 10 state sector source markets by UK region (student weeks)

Rank	Central England and Wales (n=6)		Northern England (n=5)	
1	China	10,788	China	6,502
2	Saudi Arabia	1,831	Japan	1,610
3	Kuwait	1,672	Saudi Arabia	1,043
4	Uzbekistan	803	South Korea	869
5	Tajikistan	451	Pakistan	505
6	Türkiye	396	Taiwan	464
7	Nigeria	363	Other Asia / Far East	365
8	Taiwan	311	Nigeria	221
9	Other Africa	235	United Kingdom	216
10	South Korea	179	Thailand	172

Rank	South and South Eastern England (n=4)		Rest of UK (n=8)	
1	Japan	3,003	South Korea	972
2	China	2,557	Brazil	425
3	Italy	2,490	Saudi Arabia	407
4	Germany	2,050	China	403
5	Brazil	665	Spain	308
6	Pakistan	440	Italy	161
7	South Korea	427	Japan	141
8	France	358	Other Asia / Far East	50
9	Slovakia	356	Other Central America	48
10	Czech Republic	340	Türkiye	45

Source: English UK, 2025; n=23 member centres

Note: To maintain the confidentiality of individual centre data, some of the regions were merged. The “Rest of the UK” category includes centres located in London, Scotland, and Northern Ireland. There were no state sector member centres in South West England or the Channel Islands.

The regional distribution of source markets shows clear variation across the UK. China is the leading market in both Central England & Wales and Northern England, and ranks second in South and South Eastern England, highlighting its strong nationwide presence.

In Central England & Wales, China leads by a wide margin,

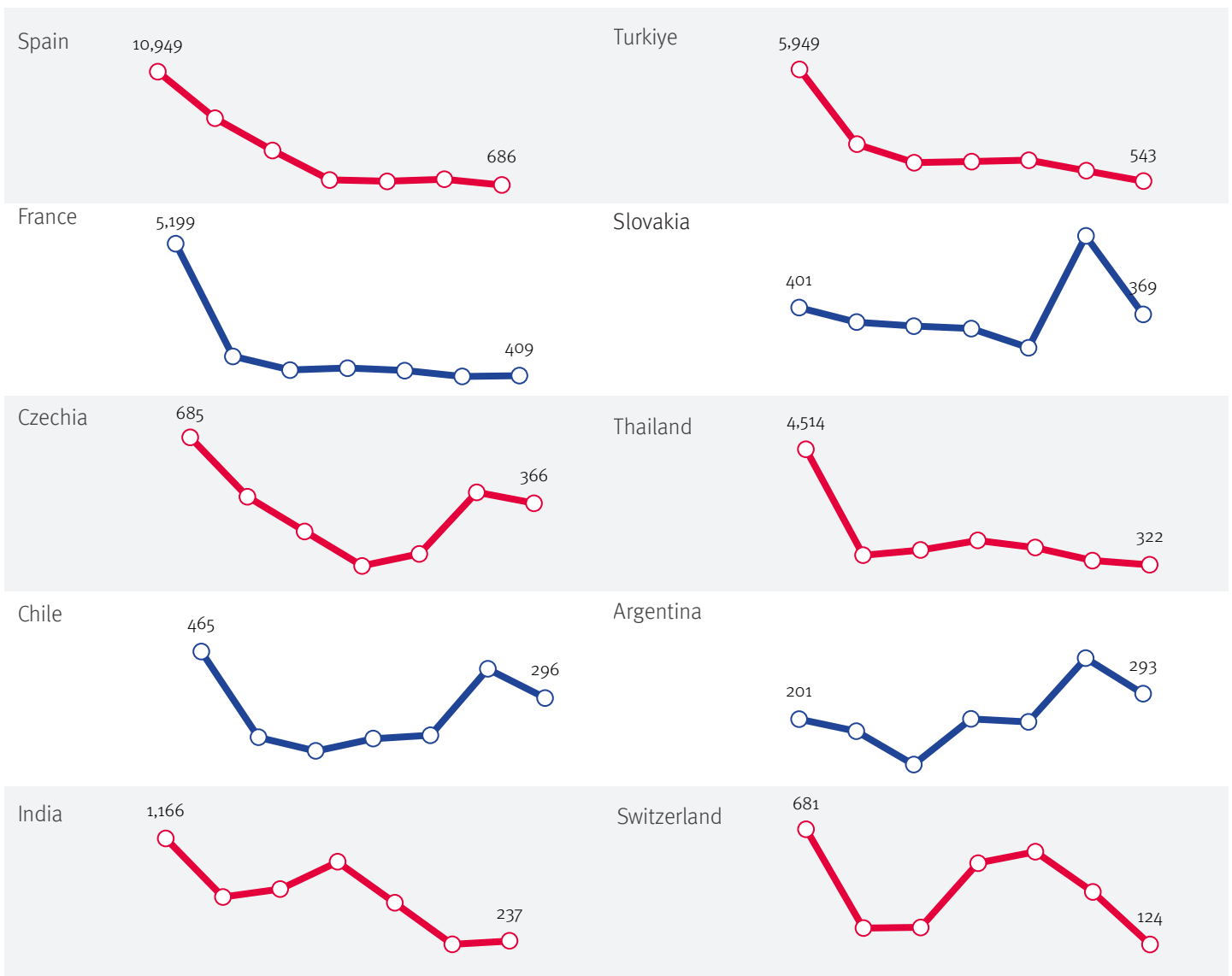
followed by Saudi Arabia and Kuwait. Northern England presents a more diversified profile, with China, Japan, and Saudi Arabia as the top markets.

By contrast, South and South Eastern England is led by Japan, alongside China and key European markets such as Italy and Germany, indicating a more balanced and diverse intake.

Source markets

Chart 17: Performance of selected source markets (student weeks, state sector, 2019-2025)



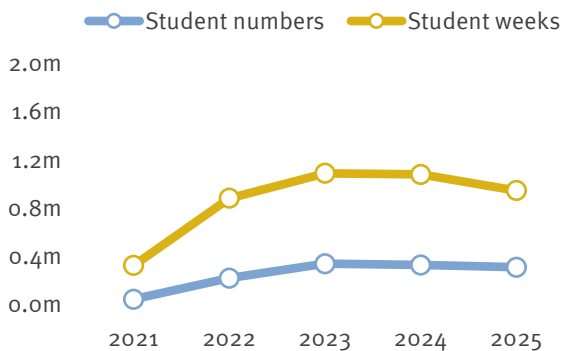


Source: English UK, 2019-2025

Note: Based on absolute figures. The number of member centres fluctuated between 54 and 23 over the measured period. Please see Chart 3 for more details.

Market overview

Chart 18: Student numbers and student weeks taught by English UK private sector member centres



Source: English UK, 2021-2025

Note: Based on absolute figures. The number of member centres fluctuated between 300 and 264 over the measured period. Please see Chart 3 for more details.

Table 9: Like-for-like comparison of 2024 vs 2025 (private sector)

	Student numbers	Student weeks
2024	315,312	1,036,939
2025	300,796	931,748
Change (%)	-4.6%	-10.1%

Source: English UK, 2024 and 2025; y-o-y 2025 vs 2024, n=256 private sector member centres reporting in both years

The decline in student numbers was largely driven by centres located in the South, South East, and South West of England, where 11,143 fewer students were recorded compared to 2024.

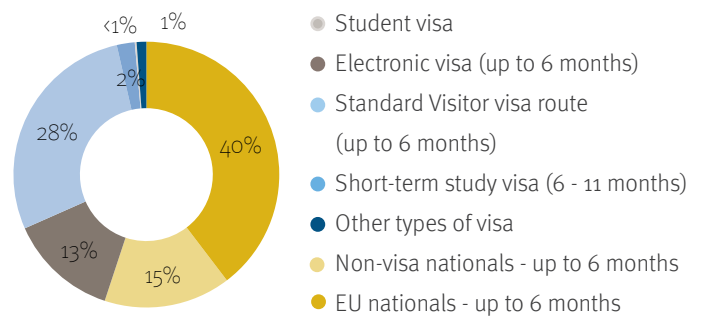
In contrast, the North of England was the only region to experience growth, attracting an additional 2,056 students year-on-year.

In 2025, English UK had 264 private sector member centres. Collectively, they welcomed 305,891 students, who studied 942,505 weeks.

The overall average course duration was 3.1 weeks, representing a slight decrease from 3.3 weeks in 2024. However, this remains broadly consistent with course durations recorded prior to the pandemic.

A like-for-like analysis, based on data from 256 centres, provides a more accurate view of underlying performance. On this basis, the private sector recorded a 4.6% decline in student numbers, while student weeks fell more sharply by 10.1%, indicating a reduction in average course duration.

Chart 19: Student numbers by visa type (private sector)

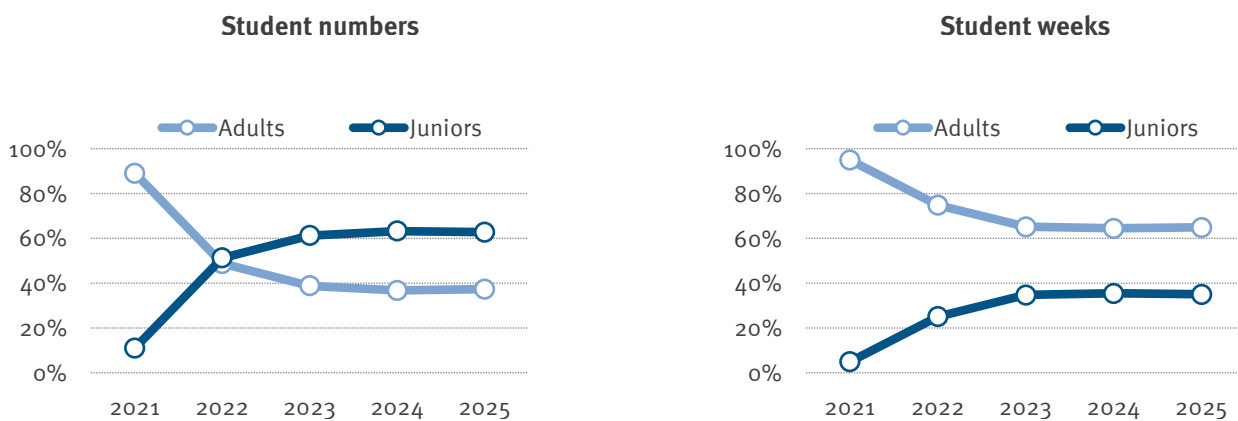


Source: English UK, 2025; n=264 private sector member centres

In 2025, the short-term study visa remained the main entry route into the UK. EU nationals accounted for 40% of students, with a further 15% requiring no visa for similar stays. Including those using Electronic Visa and non-visa entry, these groups represented 68% of all students. In contrast, fewer than 1% entered on long-term student visas, while 28% used standard visitor visas.

Private sector member centres Adult vs junior segment

Chart 20: Share of adults and juniors out of the total number of students and student weeks in the UK (private sector)



Source: English UK, 2021-2025

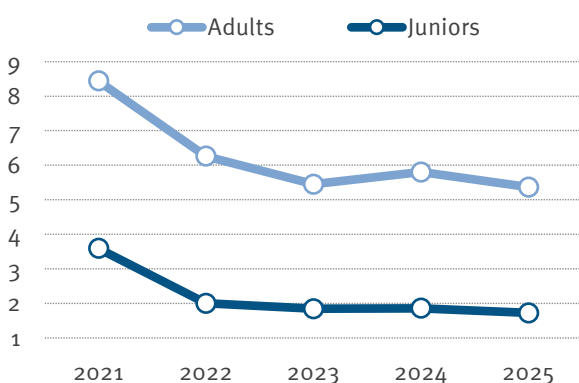
Note: The number of private sector member centres fluctuated between 300 and 264 over the measured period. Please see Chart 3 for more details.

In 2025, the private sector welcomed a total of 191,832 junior students, representing 63% of the overall student population.

Junior student numbers decreased by 7% y-o-y, while the adult segment recorded a more moderate decline of 5%.

In terms of student weeks, juniors accounted for 35% of total volume, compared with 65% for adults. Given that the majority of volume, particularly in student weeks, is concentrated among adult learners, declines in this segment exert a greater impact on provider revenues than those observed in the junior segment.

Chart 21: Average length of stay (weeks, private sector)



Source: English UK, 2021-2025

Note: The number of private sector member centres fluctuated between 300 and 264 over the measured period. Please see Chart 3 for more details.

Average course durations declined slightly across both age segments. Adult students studied for an average of 5.4 weeks in 2025, down from 5.8 weeks in 2024. Similarly, the average length of stay for junior students decreased from 1.9 weeks to 1.7 weeks.

Building on trends observed in 2024, these patterns suggest that ongoing economic pressures, including rising costs and reduced disposable income, continue to influence student behaviour, driving a shift towards shorter course durations as learners seek to manage expenditure.

Private sector member centres

Source regions

Table 10: Student weeks, students and average length of stay (weeks) by source region (private sector, rank by student weeks)

Country/region	Student weeks		Student numbers		Av. stay (wks) 2025	Change	
	2024 n=282	2025 n=259	2024 n=282	2025 n=259		Student weeks n=252	Student numbers n=252
	Overall data					Like-for-like comparison	
Western Europe	377,664	342,954	178,003	171,977	2.0	-7.4%	-1.5%
Middle East	290,592	264,738	39,045	40,641	6.5	-4.3%	8.9%
Asia	185,985	137,730	50,193	35,715	3.9	-21.8%	-26.2%
LATAM	159,207	132,960	34,724	30,994	4.3	-13.4%	-6.6%
Eastern Europe	45,272	36,484	19,522	16,573	2.2	-15.2%	-12.8%
Africa	15,062	12,506	3,126	3,384	3.7	-11.7%	9.3%
North America	1,761	2,379	614	803	3.0	41.5%	39.0%
Australasia	173	180	49	67	2.7	6.5%	42.6%

Source: English UK, 2025; n=259 private sector member centres in 2025, n=282 private sector member centres in 2024; y-o-y 2025 vs 2024, n=252 centres reporting data in both years.

Note: The 2025 figures are based on data reported by member centres that provided a full nationality breakdown (n=259). Consequently, they may not be fully consistent with the data and sample presented on page 28.

Western Europe remained the largest source region for the private sector centres in 2025, accounting for 37% of total student weeks. The region also contributed the highest number (171,977), although this represented a modest decline of 2% compared to 2024.

Students from Western Europe continued to opt for shorter lengths of stay, reflecting the strong presence of junior cohorts and sustained demand for summer programmes. The overall reduction in student weeks from the region was driven primarily by Italy which, based on like-for-like analysis, recorded a y-o-y decrease of 11,676 weeks.

In absolute terms, Asia experienced the most significant decline, both in percentage and volume. The region delivered 38,027 fewer student weeks compared to 2024 alongside a decline of 12,410 students y-o-y. This downturn in student week volume was largely driven by continued weakness in key markets, notably China (-33%), Japan (-16%), and South Korea (-10%).

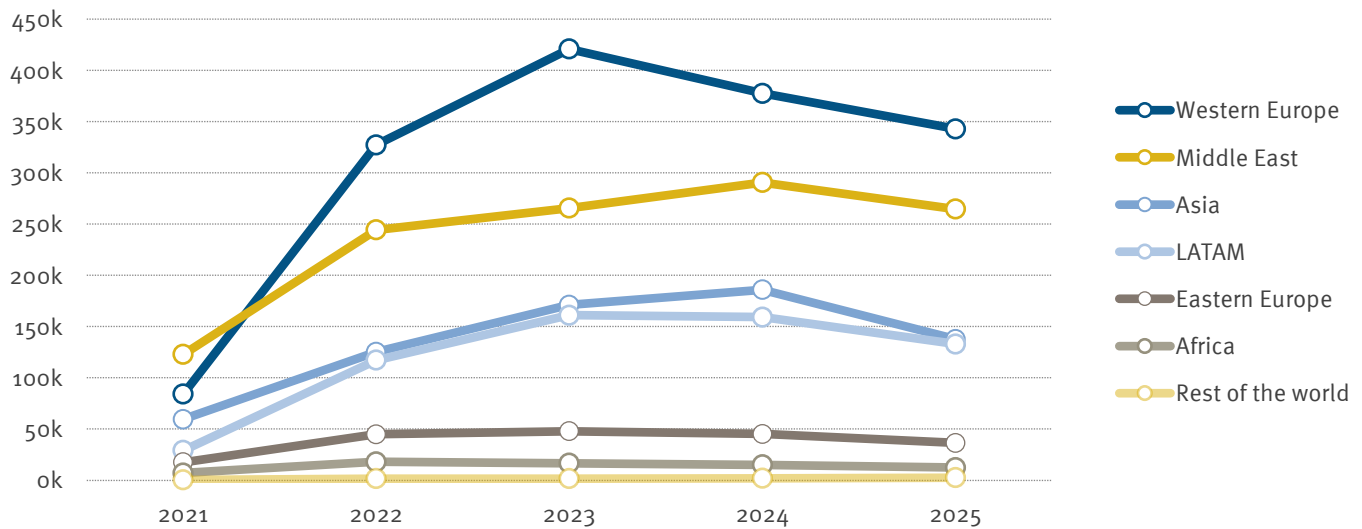
The Middle East ranked as the second largest source region. While student weeks declined by 4%, student numbers increased, driven primarily by strong growth from Türkiye, which expanded by 33% between 2024 and 2025.

Students from Türkiye, however, tended to enrol on shorter courses, with an average duration of 4.3 weeks, compared to the regional average of 6.5 weeks.

Latin America recorded the second largest absolute decline in student weeks on a like-for-like basis, with a reduction of 20,533 student weeks. This contraction was driven mainly by significant falls in Colombia (-40%) and Brazil (-14%).

In contrast, Argentina emerged as a growth market, recording a 25% increase in student weeks between 2024 and 2025.

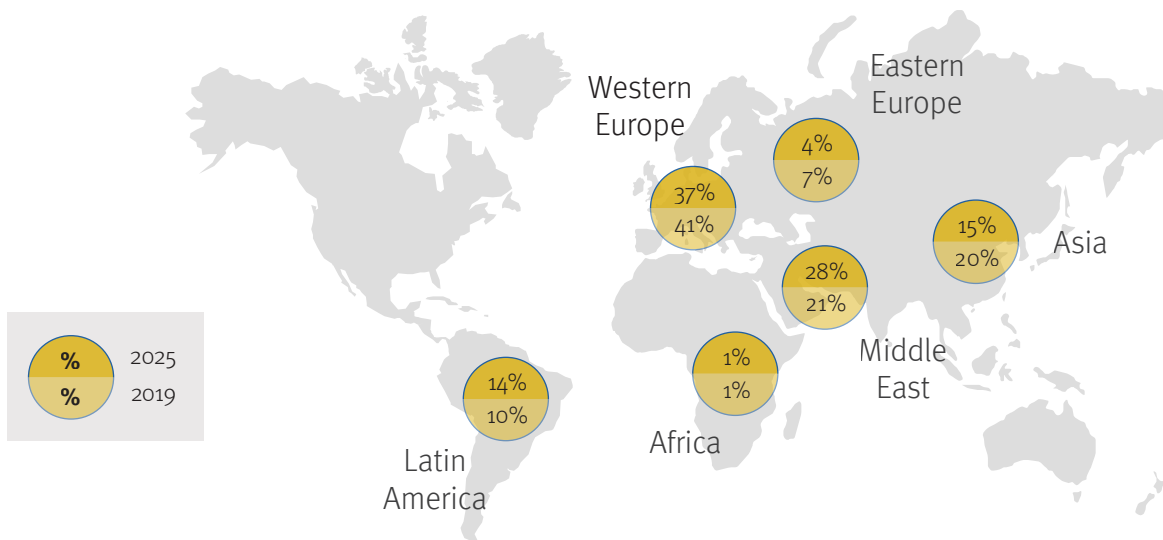
Chart 22: Student weeks by source region (2021-2025 private sector)



Source: English UK, 2021-2025

Note: Based on absolute figures. The number of member centres fluctuated between 300 and 259 over the measured period. The 2025 figures are based on data reported by member centres that provided a full nationality breakdown (n=259). Consequently, they may not be fully consistent with the data and sample presented on page 28.

Chart 23: Source region market shares (UK ELT, student weeks at private sector centres, 2019 vs 2025)



Source: English UK, in 2025 n=259, in 2019 n=359

Note: Based on absolute figures, there was a fluctuation in English UK membership in these years.

Private sector member centres

Source markets

Of the 114 source markets analysed, 36 recorded growth between 2024 and 2025, indicating that expansion was limited to a minority of markets. Performance among the top 10 source markets was more constrained, with Türkiye the only market to achieve y-o-y growth in both student numbers and student weeks.

Collectively, these top 10 markets accounted for 69% of total student weeks in the private sector. Within this group, average course duration declined across seven markets, reinforcing the broader trend towards shorter study periods. Spain and France remained broadly stable, while China recorded a minor increase in average duration, rising from 2.4 weeks in 2024 to 2.6 weeks in 2025.

Table 11: Student weeks, students and average length of stay (weeks) by source market (rank by student weeks)

Rank	Country/region	Student weeks		Student numbers		Av. stay (wks)	Change	
		2024 n=282	2025 n=259	2024 n=282	2025 n=259	2025	Student weeks n=252	Student numbers n=252
Overall data								
Like-for-like comparison								
1	Italy	156,823	142,565	81,382	80,407	1.8	-7.6%	0.0%
2	Saudi Arabia	146,320	129,675	14,936	13,507	9.6	-6.4%	-2.7%
3	Türkiye	75,761	88,470	15,815	20,394	4.3	21.2%	33.0%
4	Spain	62,241	57,273	33,780	32,172	1.8	-4.0%	-0.5%
5	France	52,704	45,980	20,349	17,822	2.6	-10.2%	-8.8%
6	Brazil	53,608	44,382	13,510	11,579	3.8	-13.6%	-10.8%
7	Japan	46,904	37,099	9,965	8,864	4.2	-16.4%	-5.5%
8	China	54,623	33,946	23,056	12,833	2.6	-33.4%	-43.0%
9	Switzerland	40,321	33,684	9,713	8,865	3.8	-15.6%	-7.7%
10	Germany	32,469	29,780	18,130	17,027	1.7	-9.2%	-6.4%
11	South Korea	32,637	28,976	3,083	3,177	9.1	-10.2%	3.9%
12	Kuwait	33,997	21,916	2,912	2,131	10.3	-34.2%	-27.8%
13	Colombia	34,616	20,546	4,010	2,271	9.0	-39.7%	-42.6%
14	Argentina	16,553	19,398	5,952	7,104	2.7	24.5%	28.9%
15	Mexico	19,707	19,325	4,679	4,215	4.6	-1.7%	-10.4%
16	Chile	15,068	12,558	2,638	2,364	5.3	-11.5%	-0.8%
17	Taiwan	15,087	11,890	3,830	3,039	3.9	-19.9%	-20.1%
18	Oman	17,380	11,042	1,991	1,480	7.5	-33.2%	-20.9%
19	Thailand	15,344	10,656	3,287	2,266	4.7	-22.1%	-24.6%
20	Russia	7,700	7,175	2,606	2,951	2.4	3.0%	19.6%
21	United Kingdom	2,891	6,958	1,149	3,110	2.2	159.1%	174.9%
22	Ukraine	8,111	6,142	2,447	2,189	2.8	-15.4%	-3.1%
23	Poland	7,848	5,853	3,959	2,814	2.1	-22.9%	-25.3%
24	Austria	6,096	5,825	4,928	4,578	1.3	-6.7%	-7.8%
25	Peru	6,218	4,920	1,084	853	5.8	-9.6%	0.2%

- **Overall data** – performance of source markets based on statistics collected from the entire sample (282 in 2024 and 259 in 2025); The 2025 figures are based on data reported by member centres that provided a full nationality breakdown (n=259).
- **Like-for-like comparison** – y-o-y benchmark based on data from centres reporting in both 2024 and 2025 (252 centres) for a more accurate assessment of source market performance trends.

Italy remained the largest source market for private sector centres. On a like-for-like basis, student weeks declined by 8%, while student numbers remained stable.

Despite declines in both student numbers and student weeks, Saudi Arabia remained the second largest source market, experiencing relatively moderate reductions of 6% in student weeks and 3% in student numbers. This suggests a greater

resilience compared to other top 10 markets, where declines were more pronounced. China, which ranked as the fifth largest source market in 2024, declined to eighth position in 2025, and delivered 33,946 student weeks.

Colombia recorded the second largest y-o-y decline in student weeks, (-13,545), further contributing to the downward trend.

Table 11: Student weeks, students and average length of stay (weeks) by source market (rank by student weeks) cont.

Rank	Country/region	Student weeks		Student numbers		Av. stay (wks) 2025	Change	
		2024 n=282	2025 n=259	2024 n=282	2025 n=259		Student weeks n=252	Student numbers n=252
Overall data								
Like-for-like comparison								
26	Belgium	5,689	4,698	1,694	1,602	2.9	-9.0%	1.7%
27	Czech Republic	6,197	4,648	3,450	2,507	1.9	-24.7%	-27.1%
28	Israel	4,456	4,297	1,652	1,786	2.4	-6.0%	5.5%
29	Portugal	4,549	4,244	1,697	1,576	2.7	-4.1%	-4.4%
30	Sweden	4,458	3,958	821	735	5.4	-10.5%	-9.1%
31	Ecuador	3,655	3,549	765	745	4.8	1.1%	3.0%
32	Libya	3,425	2,923	311	229	12.8	-9.3%	-20.8%
33	Netherlands	3,257	2,888	1,023	1,195	2.4	-12.4%	6.4%
34	Other Africa	3,050	2,865	557	518	5.5	-6.5%	-8.8%
35	Kazakhstan	4,074	2,762	1,429	982	2.8	-28.9%	-29.2%
36	Hong Kong	4,524	2,688	1,763	1,240	2.2	-34.6%	-26.5%
37	Algeria	2,798	2,453	397	550	4.5	-9.7%	40.3%
38	Romania	3,229	2,263	1,737	1,708	1.3	-31.7%	-5.5%
39	Uruguay	2,280	2,217	743	849	2.6	-1.5%	16.0%
40	Venezuela	2,050	2,158	232	268	8.1	1.8%	5.7%
41	Greece	2,794	2,145	1,863	1,658	1.3	-21.1%	-10.3%
42	Iran	3,653	1,821	297	238	7.7	-18.7%	-0.4%
43	United Arab Emirates	1,768	1,814	422	238	7.6	10.6%	-41.8%
44	Morocco	1,713	1,649	815	1,216	1.4	-90.5%	-93.6%
45	Albania	1,307	1,591	79	135	11.8	35.8%	82.4%
46	Uzbekistan	1,247	1,546	436	647	2.4	38.2%	54.6%
47	Hungary	1,790	1,404	916	716	2.0	-20.5%	-21.3%
48	Slovakia	1,814	1,403	918	775	1.8	-22.1%	-14.7%
49	Qatar	1,543	1,387	184	156	8.9	-3.9%	-7.3%
50	Serbia	1,409	1,193	745	597	2.0	-13.9%	-21.8%

- Overall data** – performance of source markets based on statistics collected from the entire sample (282 in 2024 and 259 in 2025); The 2025 figures are based on data reported by member centres that provided a full nationality breakdown (n=259).
- Like-for-like comparison** – y-o-y benchmark based on data from centres reporting in both 2024 and 2025 (252 centres) for a more accurate assessment of source market performance trends.

Private sector member centres

Source markets

Table 11: Student weeks, students and average length of stay (weeks) by source market (rank by student weeks) cont.

Rank	Country/region	Student weeks		Student numbers		Av. stay (wks)	Change	
		2024 n=282	2025 n=259	2024 n=282	2025 n=259	2025	Student weeks n=252	Student numbers n=252
Overall data						Like-for-like comparison		
51	Angola	1,873	1,191	140	122	9.8	-30.9%	-3.9%
52	Other Central America	1,701	1,177	447	267	4.4	-29.3%	-39.4%
53	Bulgaria	1,415	1,167	534	416	2.8	-12.4%	-23.8%
54	Vietnam	1,195	1,147	422	358	3.2	7.6%	-13.5%
55	Panama	2,246	1,119	236	133	8.4	-49.5%	-41.9%
56	Other Asia / Far East	2,515	997	392	304	3.3	-60.5%	-22.4%
57	USA	945	984	384	399	2.5	12.6%	12.1%
58	Georgia	1,266	923	559	499	1.8	-20.8%	-6.0%
	Iraq	895	916	132	206	4.4	-2.0%	15.2%
60	Mongolia	843	858	107	144	6.0	15.5%	41.2%
61	Syria	778	846	113	92	9.2	13.2%	-1.1%
62	Canada	454	836	174	335	2.5	87.4%	97.6%
63	Pakistan	791	833	89	69	12.1	16.5%	-17.9%
64	Denmark	1,103	828	440	331	2.5	-24.0%	-23.0%
65	Croatia	1,179	817	573	410	2.0	-29.6%	-27.6%
66	Tunisia	1,195	784	657	570	1.4	-34.5%	-14.8%
67	Azerbaijan	1,025	750	431	375	2.0	-11.2%	-4.6%
68	Yemen	949	691	85	59	11.7	-22.6%	-26.3%
69	Finland	708	633	244	238	2.7	-9.8%	-1.7%
70	Bahrain	620	598	116	79	7.6	-13.9%	-44.8%
71	Jordan	1,648	564	229	95	5.9	-64.5%	-57.8%
72	India	765	559	215	138	8.1	-26.4%	-36.4%
	Other North America	362	559	56	69	4.1	54.8%	32.7%
74	Egypt	617	515	161	124	4.2	-10.4%	-3.2%
75	Slovenia	603	513	291	236	2.2	-13.6%	-17.8%
76	Estonia	529	477	453	394	1.2	-6.5%	-9.8%
77	Costa Rica	205	469	45	110	4.3	136.9%	150.0%
78	Armenia	574	465	350	291	1.6	-30.1%	-29.7%
79	Cyprus	590	461	185	165	2.8	-23.1%	-19.1%
80	Paraguay	671	451	160	103	4.4	-32.4%	-34.8%
81	Other South America	377	441	196	107	4.1	19.5%	-45.6%
82	Indonesia	1,041	405	291	97	4.2	-61.0%	-66.3%

- Overall data** – performance of source markets based on statistics collected from the entire sample (282 in 2024 and 259 in 2025); The 2025 figures are based on data reported by member centres that provided a full nationality breakdown (n=259).
- Like-for-like comparison** – y-o-y benchmark based on data from centres reporting in both 2024 and 2025 (252 centres) for a more accurate assessment of source market performance trends.

Table 11: Student weeks, students and average length of stay (weeks) by source market (rank by student weeks) cont.

Rank	Country/region	Student weeks		Student numbers		Av. stay (wks) 2025	Change	
		2024 n=282	2025 n=259	2024 n=282	2025 n=259		Student weeks n=22	Student numbers n=22
Overall data							Like-for-like comparison	
83	Norway	380	402	155	138	2.9	7.2%	-10.5%
84	Latvia	477	322	189	143	2.3	-19.7%	-10.6%
85	Macao	324	295	173	110	2.7	-6.6%	-35.7%
86	Other Western Europe	401	285	248	183	1.6	-33.1%	-31.3%
87	Other Middle East	542	274	64	50	5.5	-43.9%	-15.5%
88	Palestine	187	252	74	90	2.8	34.8%	21.6%
89	Bolivia	252	250	27	26	9.6	12.1%	18.2%
90	Lithuania	274	235	143	100	2.4	-8.2%	-26.5%
91	Belarus	308	234	111	105	2.2	-13.0%	8.2%
92	Liechtenstein	176	229	74	91	2.5	51.7%	44.4%
93	Cambodia	397	212	81	41	5.2	-46.6%	-49.4%
94	Montenegro	202	211	76	103	2.0	11.1%	47.1%
95	Ireland	352	201	200	92	2.2	-40.9%	-53.8%
96	Luxembourg	172	183	78	81	2.3	10.9%	8.0%
97	Lebanon	95	175	23	40	3.8	81.7%	85.7%
98	Turkmenistan	201	175	74	46	4.4	-8.9%	-36.1%
99	Iceland	40	168	14	62	2.7	41.2%	31.9%
100	Other Eastern	70	167	22	38	4.4	138.6%	72.7%
101	Kyrgyzstan	76	153	25	45	3.4	240.0%	104.5%
102	Malaysia	150	130	44	88	1.5	6.6%	114.6%
103	Nigeria	391	126	88	55	2.3	-81.8%	-89.7%
104	Macedonia	97	116	21	26	2.2	19.6%	23.8%
	Australia	60	116	30	53	4.5	107.1%	89.3%
106	Philippines	190	107	48	34	3.1	-35.5%	-27.7%
107	Tajikistan	124	87	19	12	7.3	-29.8%	-36.8%
108	Nepal	28	54	10	8	6.8	92.9%	-20.0%
109	Other Australasia	95	49	10	6	8.2	-48.4%	-40.0%
110	Moldova	34	48	17	32	1.5	41.2%	88.2%
111	Bosnia and Herzegovina	89	44	50	13	3.4	-50.6%	-74.0%
112	Monaco	40	27	21	14	1.9	-15.6%	-17.6%
113	Singapore	40	17	14	8	2.1	-50.0%	-33.3%
114	New Zealand	18	15	9	8	1.9	-16.7%	-11.1%

- **Overall data** – performance of source markets based on statistics collected from the entire sample (282 in 2024 and 259 in 2025); The 2025 figures are based on data reported by member centres that provided a full nationality breakdown (n=259).
- **Like-for-like comparison** – y-o-y benchmark based on data from centres reporting in both 2024 and 2025 (252 centres) for a more accurate assessment of source market performance trends.

Source: English UK, 2025

Source markets

Chart 24: Top 10 Source markets ranked by total student weeks (like-for-like, 2025), with trend data from 2023–2025

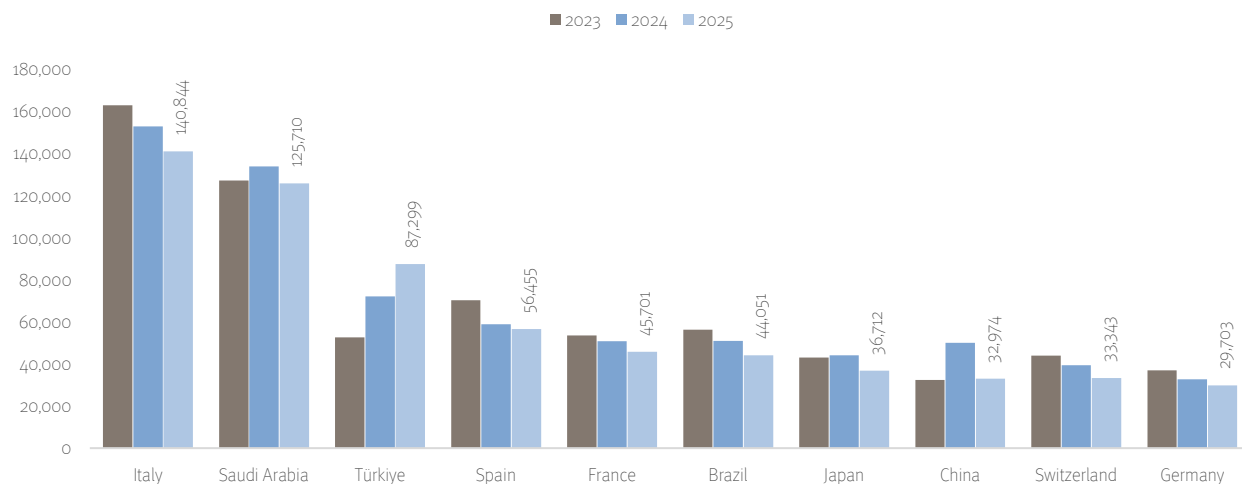


Table 12: Source markets trend data from 2023–2025 and like-to-like change

Rank	Country	Student weeks			Year-on-year change (n=246)		
		2023 n=246	2024 n=246	2025 n=246	2023 vs 2024	2024 vs 2025	CAGR 2023 vs 2025
1	Italy	162,802	152,758	140,844	-6%	-8%	-7%
2	Saudi Arabia	126,959	133,740	125,710	5%	-6%	0%
3	Türkiye	52,557	71,989	87,299	37%	21%	29%
4	Spain	70,181	58,848	56,455	-16%	-4%	-10%
5	France	53,502	50,807	45,701	-5%	-10%	-8%
6	Brazil	56,260	50,884	44,051	-10%	-13%	-12%
7	Japan	42,956	44,055	36,712	3%	-17%	-8%
8	China	32,358	49,977	32,974	54%	-34%	1%
9	Switzerland	43,975	39,401	33,343	-10%	-15%	-13%
10	Germany	36,872	32,667	29,703	-11%	-9%	-10%

Source: English UK, 2023-2025; n=246 member centres

Note: Based on data reported by member centres that participated across all three years (2023, 2024, and 2025) to ensure a more accurate assessment. Consequently, these figures may not be consistent with the data presented on pages 32–35.

This section provides a three-year comparative analysis of the top 10 source markets from 2023 to 2025. The data indicates a period of volatility followed by uneven adjustment.

In 2024, performance was mixed: four out of the ten markets showed strong growth, particularly China (+54%), Türkiye (+37%), and Saudi Arabia (+5%), while others, including Spain (-16%), Germany (-11%), and Switzerland (-10%), declined.

This momentum was not sustained in 2025, with most markets

recording declines. Among these, China recorded the largest decline delivering 17,003 fewer student weeks, followed by Italy - with a drop of 11,914 weeks.

Using CAGR analysis to calculate the average annual rate of change over the 2023–2025 period, trends varied across markets. Türkiye recorded growth (+29% CAGR). By contrast, several established European markets, including Spain, Switzerland and Germany, recorded sustained declines of -10%, -13% and -10% CAGR, respectively.

Table 13: Private sector – top source countries by UK region (student weeks)

Rank	Central England and Wales (n=19)		Eastern England (n=21)		London (n=63)		Northern England (n=40)	
1	Saudi Arabia	8,314	Italy	14,103	Türkiye	35,764	Saudi Arabia	47,280
2	Italy	4,969	Türkiye	5,209	Italy	31,487	Kuwait	15,390
3	France	3,528	Spain	4,741	Brazil	21,197	Italy	15,360
4	Spain	3,071	Saudi Arabia	4,705	Japan	16,038	Türkiye	10,642
5	Kuwait	1,792	China Rep	3,554	France	13,715	Brazil	7,868
6	Japan	1,622	France	2,966	Saudi Arabia	13,436	Spain	6,612
7	Türkiye	1,532	Argentina	1,787	China	13,188	Colombia	5,119
8	China	1,230	Japan	1,727	South Korea	12,644	Oman	5,085
9	Brazil	843	Switzerland	1,724	Argentina	8,040	France	4,648
10	Colombia	428	Brazil	1,587	Switzerland	7,694	China	4,510

Rank	Scotland and Northern Ireland (n=12)		South and South Eastern England (n=60)		South West England and The Channel Islands (n=44)	
1	Italy	24,214	Italy	31,989	Saudi Arabia	25,210
2	Saudi Arabia	4,909	Türkiye	26,922	Italy	20,443
3	Spain	3,233	Saudi Arabia	25,821	Spain	10,711
4	Brazil	1,418	Spain	21,461	Switzerland	7,840
5	China	1,215	Germany	13,234	France	7,330
6	France	1,121	France	12,672	Türkiye	7,249
7	Switzerland	991	Switzerland	12,060	Germany	6,579
8	Oman	857	Japan	11,285	Colombia	4,697
9	Germany	749	Brazil	9,196	Japan	3,604
10	Portugal	647	China	7,931	South Korea	3,531

Source: English UK, 2025; n=259 member centres

Note: In order to maintain the confidentiality of individual centre data, some of the regions were merged.

Note: Data is collected at member-organisational level and attributed to headquarters for multi-centre providers. Regional figures, therefore, may not fully reflect where teaching took place.

Italy continues to be the largest source market for centres located in the South and South East of England, as well as in Scotland and Northern Ireland.

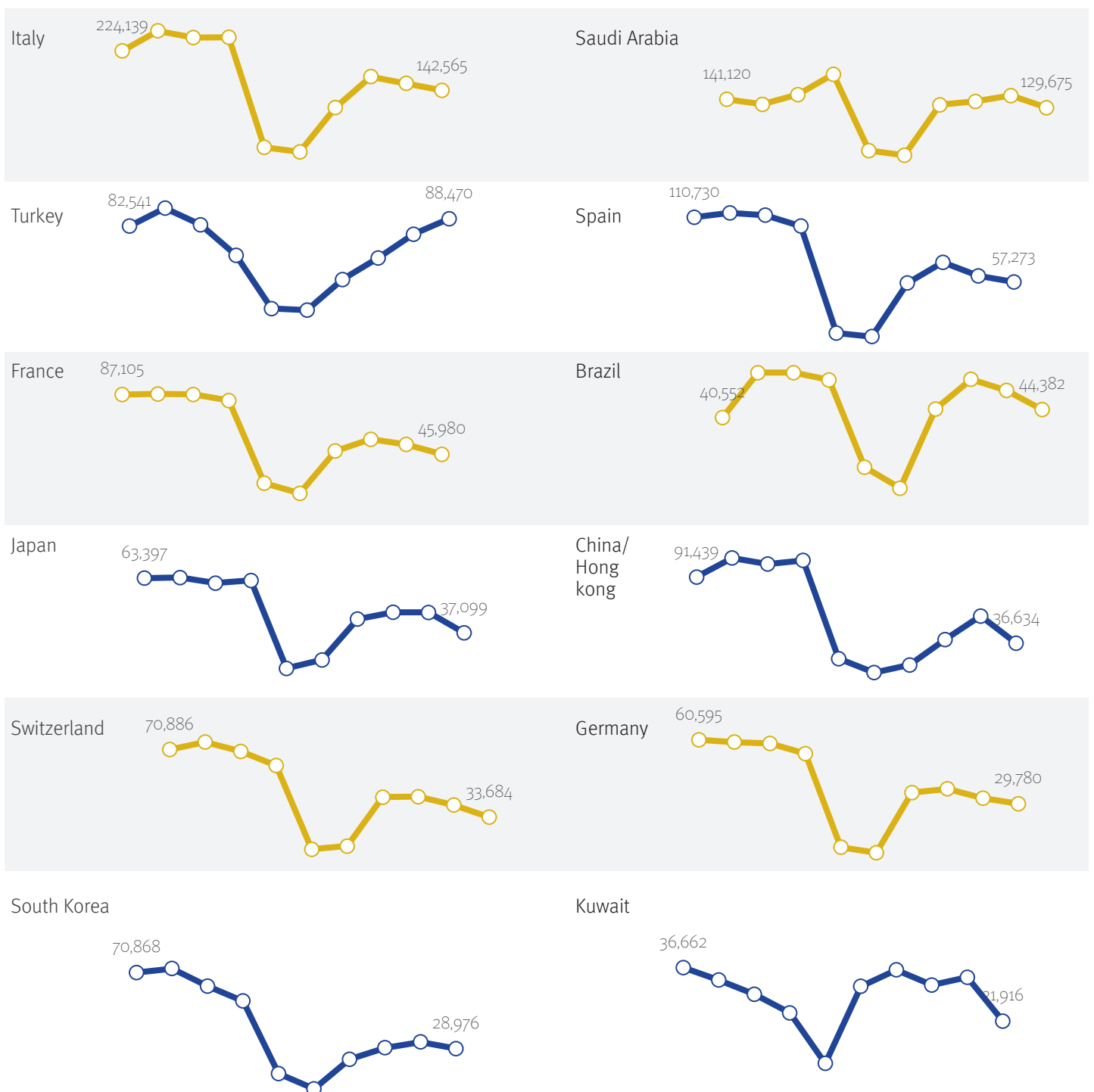
Building on trends observed in 2024, Türkiye remained the leading source market for centres in London, delivering a total of 35,764 student weeks, an increase of 978 compared to the

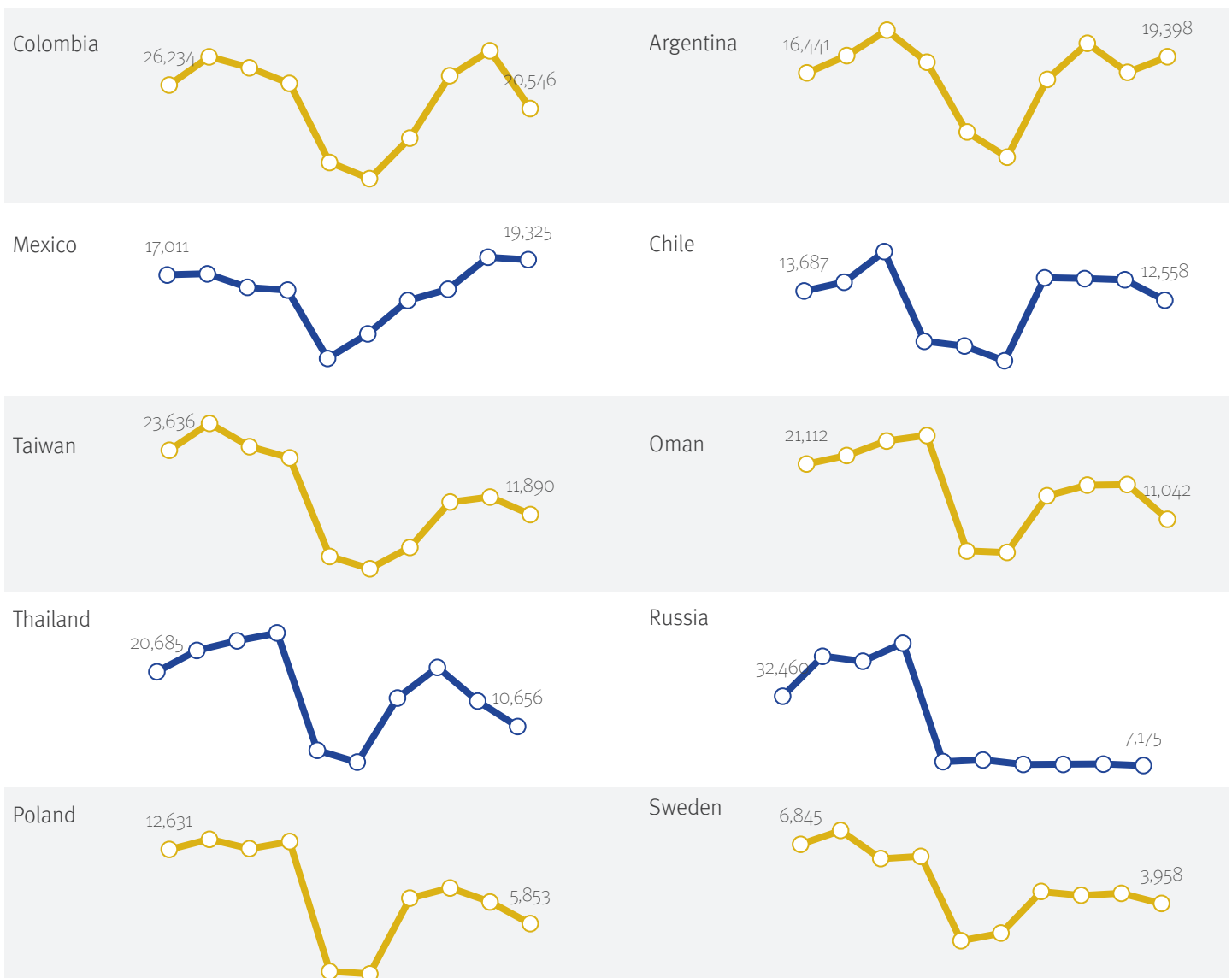
previous year (based on overall figures).

Saudi Arabia remained the dominant source market for Northern England, accounting for 30% of total student weeks in the region. Similarly it retained its leading position for Central England & Wales, and South West England and The Channel Islands.

Source markets

Chart 25: Performance of selected source markets (student weeks, private sector, 2016-2025)





Source: English UK, 2016-2025

Note: Based on absolute figures. The number of private sector member centres between 300 and 264 over the measured period. Please see Chart 3 for more details.

Part-time students at English UK member centres

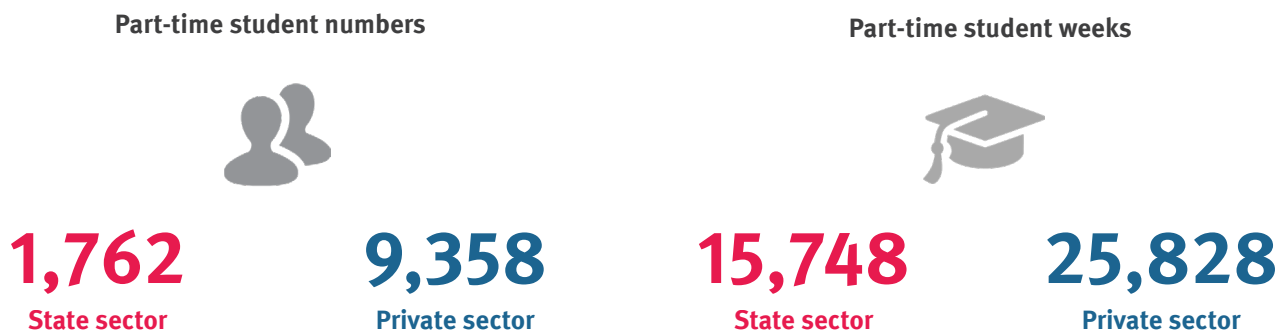
Market overview

This section examines trends relating to part-time students defined, for the purposes of this analysis, as international English language learners enrolled on courses with fewer than 10 taught hours per week.

The number of centres running face-to-face part-time courses fluctuates over time. 5 more providers ran these in 2025 than in 2024.

In 2025, 11,120 students studied part-time courses at 76 English UK member centres, generating 41,576 student weeks. While student numbers increased slightly, rising by 332 compared to 2024, total student weeks declined for the third consecutive year, falling by 9% y-o-y. This reduction was driven primarily by the state sector, which recorded a 12% decline in part-time student weeks.

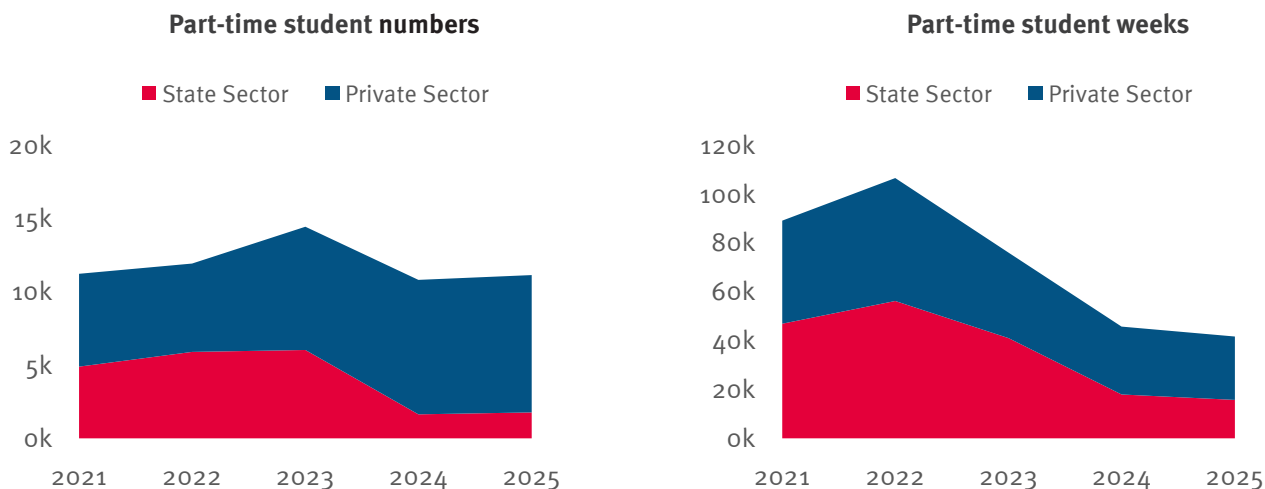
Chart 26: Part-time student numbers and part-time student weeks taught by English UK member centres



Source: English UK, 2025;

Note: Data were provided by 287 English (UK) members. Of these, 76 ran part-time face-to-face courses

Chart 27: Overall number of part-time students (2021-2025) and part-time student weeks (2021-2025) taught by English UK member centres



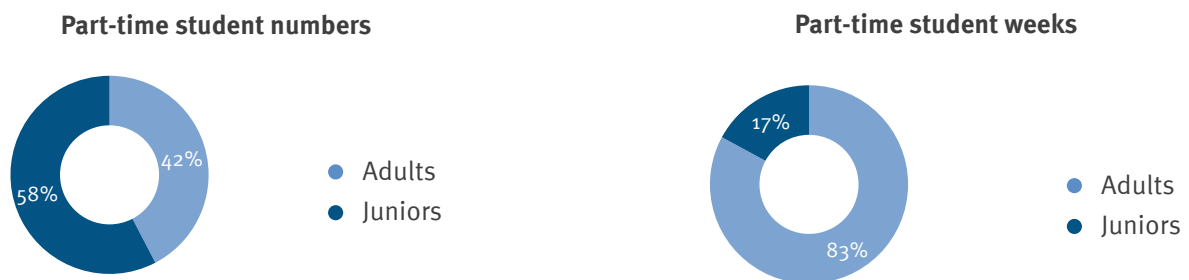
Source: English UK, 2021-2025

Note: The analysis is based on absolute figures. The number of member centres offering part-time courses fluctuated over the measured period: in 2021, n=83; in 2022, n=80; in 2023, n=67; in 2024, n=71 and n=76 in 2025

Part-time students at English UK member centres

Adult vs junior segment

Chart 28: Proportion of adults and juniors in part-time provision



Source: English UK, 2025; n=76

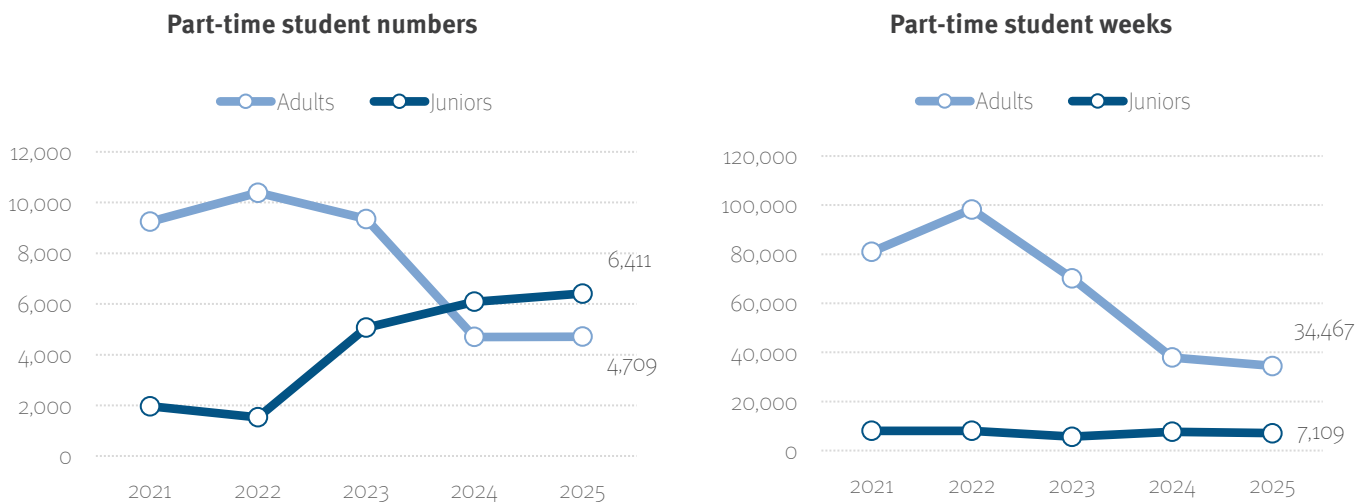
Adults accounted for 42% of the total part-time student population, but represented a significantly higher share of activity, contributing 83% of total part-time student weeks.

In contrast, the number of junior students enrolled in part-time provision increased by 5% y-o-y. However, consistent with trends observed across the wider sector, this growth in enrolments did not translate into increased activity, as junior student weeks declined by 8%, reflecting shorter average course durations.

The overall average length of stay in the part-time segment decreased from 4.2 weeks in 2024 to 3.7 weeks in 2025.

A sector-level breakdown highlights contrasting patterns. The decline in junior student weeks was driven primarily by the state sector, where no part-time junior enrolments were recorded in 2025, compared to 1,395 student weeks in 2024. In contrast, the private sector recorded an increase in junior part-time activity, with student weeks rising from 6,296 in 2024 to 7,109 in 2025.

Chart 29: Overall number of part-time adults and juniors (2021 -2025) and part-time junior and adult student weeks (2021-2025) taught by English UK member centres (private and state sector combined)



Source: English UK, 2021-2025

Note: The analysis is based on absolute figures. The number of member centres offering part-time courses fluctuated over the measured period: in 2021, n=83; in 2022, n=80; in 2023, n=67; in 2024, n=71 and n=76 in 2025

Part-time students at English UK member centres

Source regions

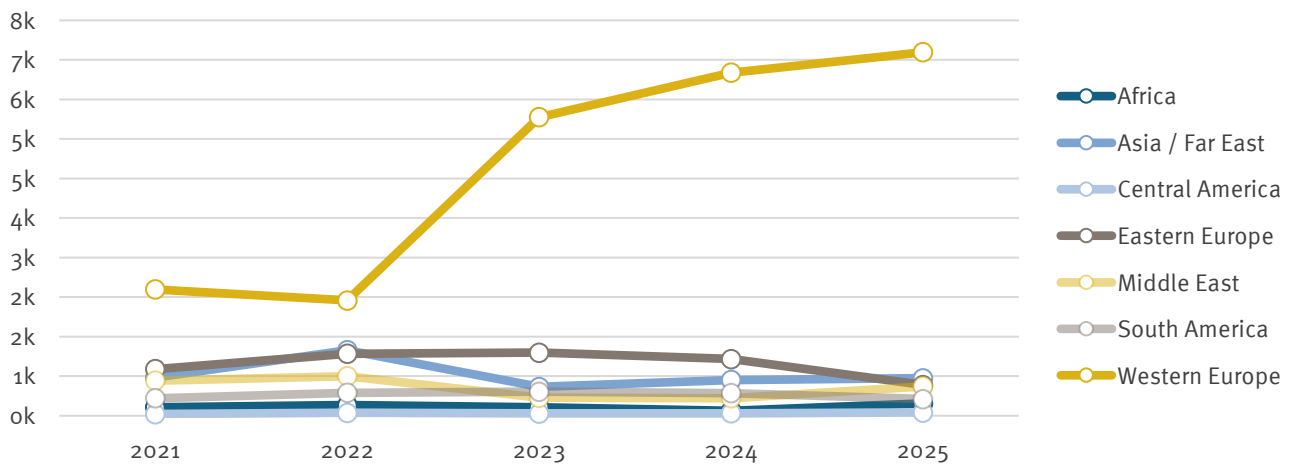
Part-time student numbers showed mixed regional trends in 2025. Western Europe remained the dominant source of part-time student enrollments, and recorded a modest y-o-y increase of 6%, reaching 6,897 students. Asia/Far East also recorded steady increases (up 5%).

source region and sector. In the private sector, Western Europe, Australasia and Africa were largely junior-led, with juniors accounting for 83%, 63% and 52% of total student numbers respectively.

The age profile of part-time students varied significantly by

In contrast, part-time provision from Asia/Far East, Central America and South America was predominantly adult-focused,

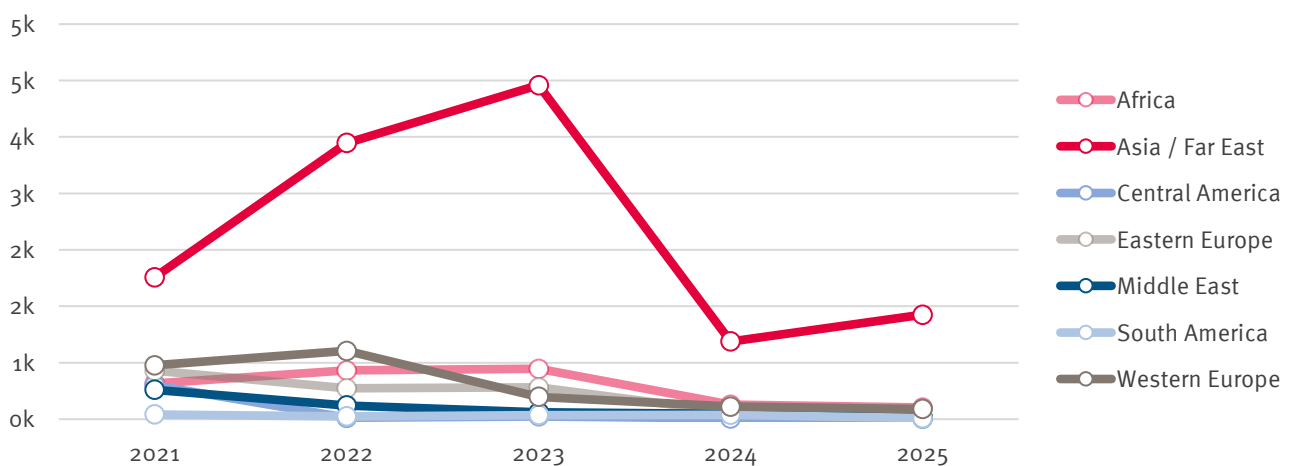
Chart 30: Part-time student numbers by source region (2021-2025, private sector centres)



Source: English UK, 2021-2025

Note: The number of member centres offering part-time courses fluctuated over the measured period: in 2021, n=83; in 2022, n=80; in 2023, n=67; in 2024, n=71 and n=76 in 2025

Chart 31: Part-time student numbers by source region (2021-2025, state sector centres)



Source: English UK, 2021-2025

Note: The number of member centres offering part-time courses fluctuated over the measured period: in 2021, n=83; in 2022, n=80; in 2023, n=67; in 2024, n=71 and n=76 in 2025

Part-time students at English UK member centres

Source regions

with adults accounting for 80%, 85%, and 96% respectively.

Eastern Europe and the Middle East also showed a majority adult profile, though with a more balanced distribution between age groups. From a student weeks perspective, adults contributed a disproportionately higher share across most regions, reflecting longer average durations compared to junior cohorts.

In the state sector, part-time provision was entirely adult-based, with no junior enrolments recorded across any region in 2025.

Asia/Far East remained the dominant source region, accounting for the vast majority of both part-time student numbers and student weeks, followed by smaller contributions from Africa and Western Europe.

Chart 32: Adult to junior ratio (part-time student numbers, private sector centres)

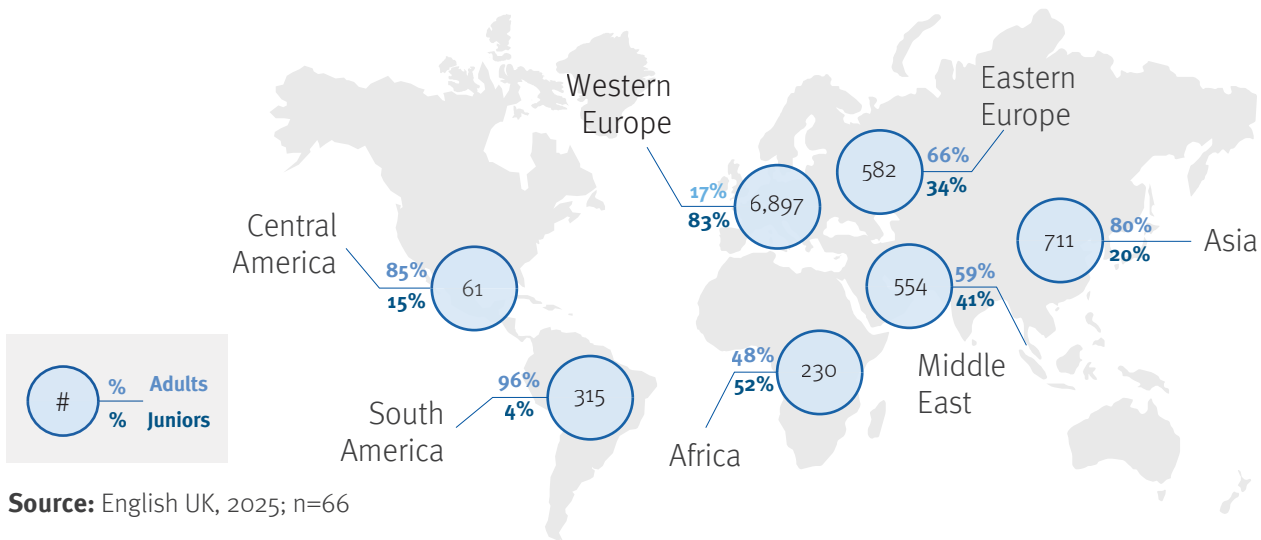
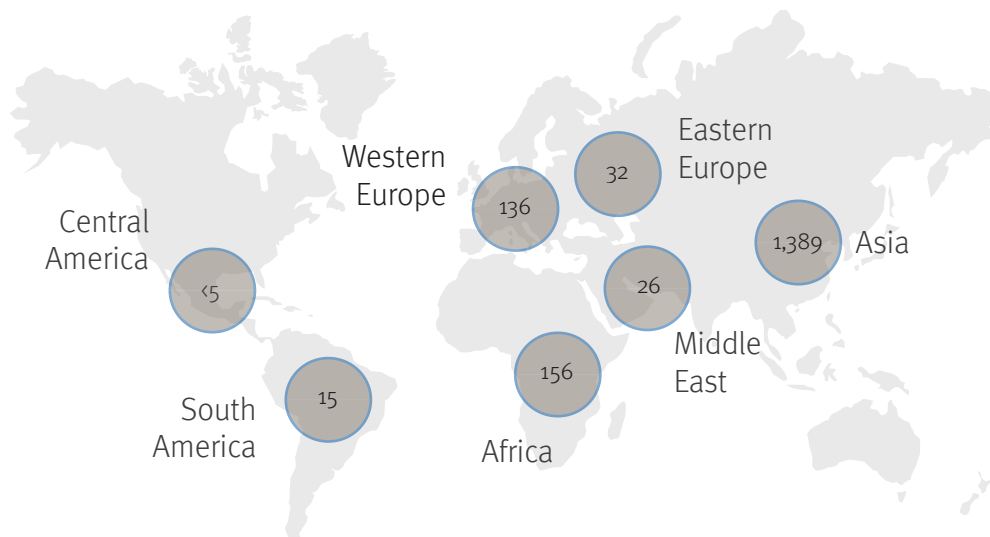


Chart 33: Number of part-time students by source region (state sector centres)



Online students at English UK member centres

Market overview

This section presents an analysis of online students. For the purposes of this report, 'online students' are defined as international English language learners studying remotely via online platforms with English UK member centres.

In 2025, the number of students enrolled in online English language programmes declined from 5,451 in 2024 to 4,269. Despite this fall in enrollments, overall study volume increased, with student weeks rising by 28% in the part-time segment and by 3% in the full-time segment.

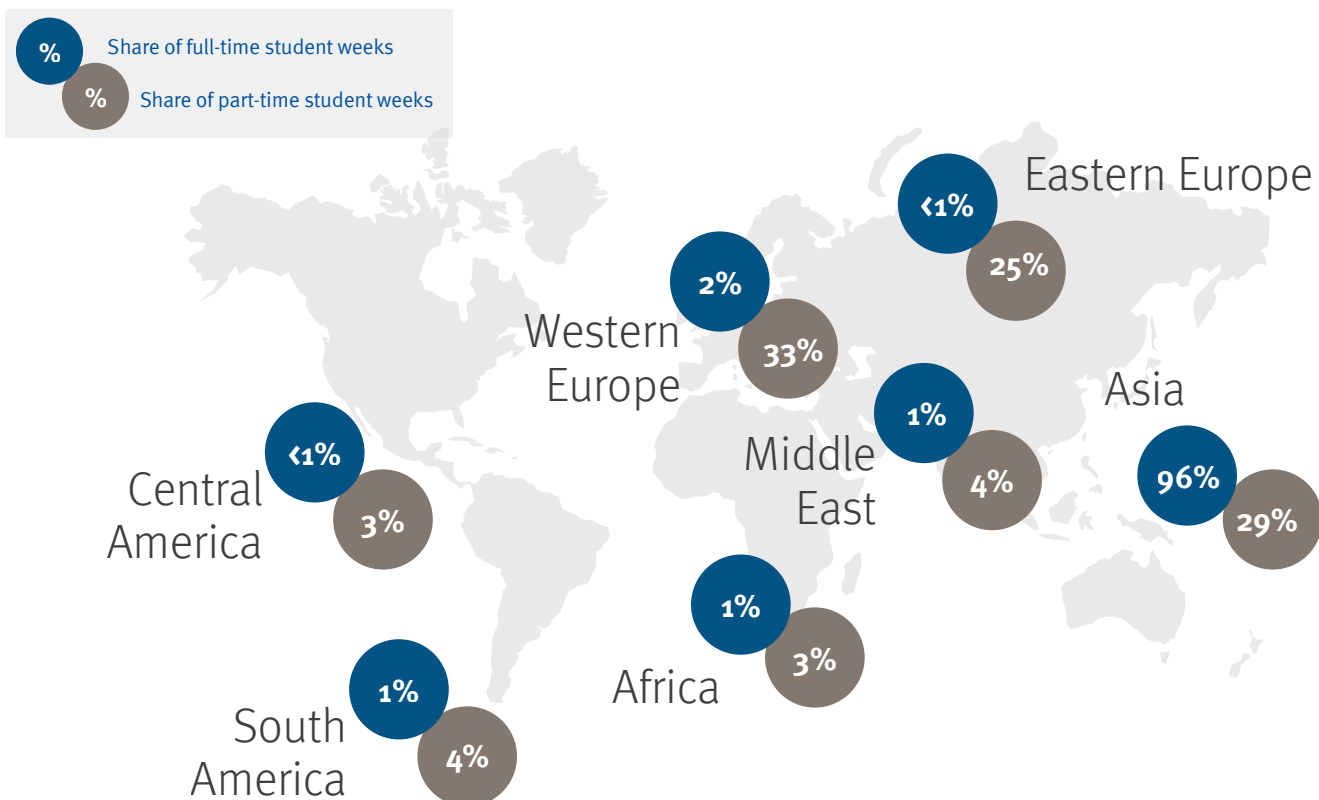
Online provision was more evenly distributed between part-time and full-time study in 2025. While part-time students accounted for 58% of online enrolments in 2024, this shifted to an even 50:50 split between part-time and full-time study in 2025.

Full-time online provision remained highly concentrated, with 96% of student weeks delivered to adult learners from Asia and the Far East.

In contrast, part-time online provision was more regionally diverse. Western Europe represented the largest cohort, accounting for 31% of total part-time student weeks. Adults dominated, contributing 87% of the total weeks. 100% of online students from Central or South America were adults and most of these (94%) studied on a part-time rather than a full-time course.

The highest share of part-time activity among junior students was observed in Asia and the Far East, where 67% of student weeks from the region were delivered to 327 junior learners.

Chart 34: Market share by source region of full-time and part-time online student weeks

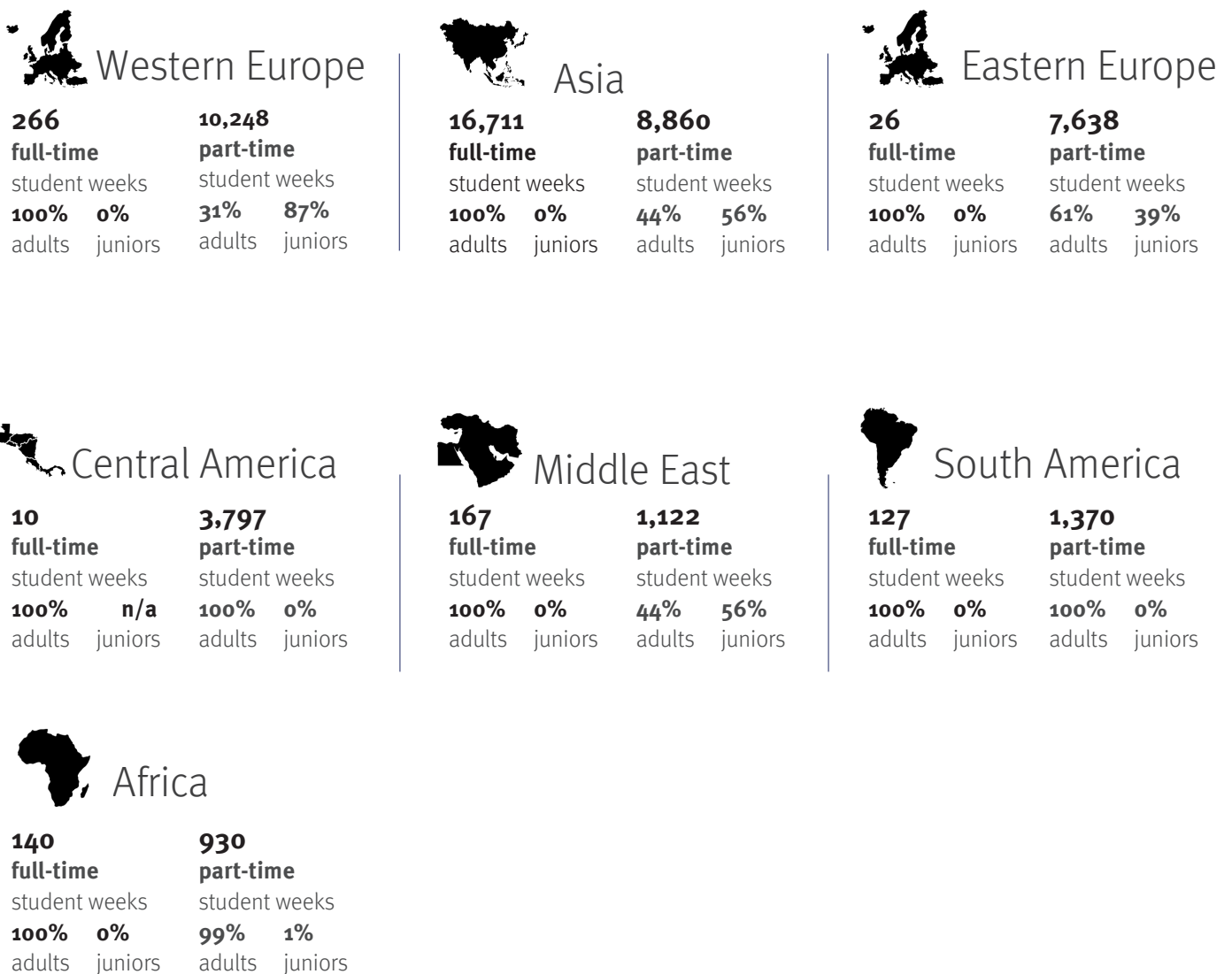


Source: English UK, 2025; n=44

Note: This analysis is based solely on data from member centres that were able to provide the breakdown of their online classes. While some member centres conducted online classes, they were unable to provide the breakdowns, and thus, were not included in the analysis.

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

Chart 35: Distribution of full-time and part-time online student weeks by source region and age segment



Source: English UK, 2025; n=44

Note: This analysis is based solely on data from member centres that were able to provide the breakdown of their online classes. While some member centres conducted online classes, they were unable to provide the breakdowns, and thus, were not included in the analysis.

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



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