QUARTERLY INTELLIGENCE COHORT

Q1 2025

English language students in the UK each quarter

Executive summary

ENGLISH UK

BONARD

QUIC QUARTERLY INTELLIGENCE COHORT

Student statistics report **Q1 2025**

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The quarterly intelligence cohort

Introduction

Market intelligence is a key driver of business success. At English UK, we support our members with comprehensive, high-value insights into the UK English language teaching (ELT) industry.

Our optional student statistics scheme, the Quarterly Intelligence Cohort (QUIC), offers unique insights beyond those provided in the annual student statistics reports. QUIC tracks seasonal trends, provides timely and in-depth analysis of evolving source markets, and helps members identify high-potential opportunities for growth.

Each quarter, we collect data from a diverse mix of year-round and seasonal English language centres across both the private and public sectors. In Q1 2025, 126 member centres participated, representing 41% of English UK's membership. This is one of the highest participation rates to date and underscores QUIC's growing value to the sector.

Our insight partner, BONARD, an independent, ESOMAR-accredited research firm, handles the data processing and analysis. Their two-tier validation system and adherence to international standards ensure consistently accurate and reliable results.

With complete datasets from 2019, 2024, and 2025, this year's reports include historical comparisons and detailed analysis of recovery levels. While executive summaries are publicly available, only QUIC participants receive the full reports.

Participants also have access to enhanced sectoral, regional, and provider-type breakdowns through interactive pivot tables. These user-friendly tools deliver targeted insights and benchmarks tailored to their specific organisation -providing a clear competitive edge.

Note: Data is provided in student weeks, defined as one student taking 10 or more teacher-taught hours in one week. Those studying fewer hours are excluded from the calculations.

In-depth insights into 100+ ELT source markets sending international students to English UK member centres.

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QUIC QUARTERLY INTELLIGENCE COHORT

General overview

Q1 2025 at a glance

Table 1
QUIC region summary

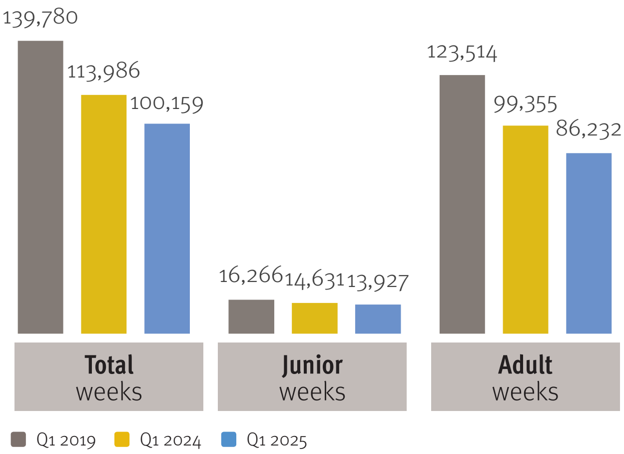
Region	**No.** of returns	**Proportion** of returns	**Total** weeks	**Market** share
		%	Σ	%
London	30	25.2	37,019	31.8
South and South Eastern England	29	24.4	21,658	18.6
Northern England	25	21.0	29,410	25.3
South West England and the Channel Islands	16	13.4	11,931	10.3
Eastern England	11	9.2	10,661	9.2
Central England and Wales	4	3.4	2,471	2.1
Scotland and Northern Ireland	4	3.4	3,247	2.8
Total	**119**	**100.0**	**116,397**	**100.0**

Note: 119 of 223 teaching centre locations reported student weeks in Q1 2025. This number differs per quarter and depends on when seasonal teaching centre locations are operational.
Note: Figures of student weeks per region were rounded and may not add up to the total sum of student weeks.
Note: In order to maintain the confidentiality of individual centre data, some of the regions were merged.

A total of 126 UK member centres subscribed to QUIC 2025, representing 223 teaching centre locations. Of these, 119 teaching premises were open in Q1 2025, reflecting a 5% increase compared to Q1 2024. Collectively, they recorded 116,397 student weeks.

Compared to Q1 2019, total student weeks in Q1 2025 reached 71% of pre-pandemic levels.

Chart 1
Like-to-like comparison of student weeks by quarter



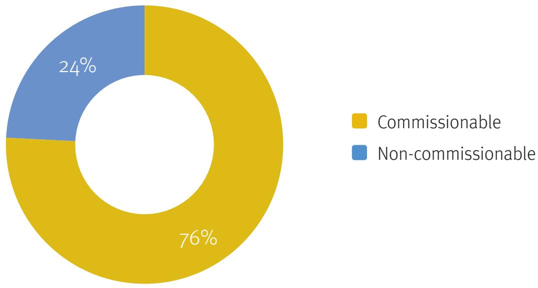
In a like-for-like comparison, reporting centres experienced an overall decline of 12% in student weeks from Q1 2024 to Q1 2025. Junior student weeks declined by 1,070 (-5%), while adult student weeks saw a sharper drop of 14,150 (-13%).

Table 2
Year-on-year change in student weeks

	Total weeks	Junior weeks	Adult weeks
Q1 2019 vs Q1 2025	-28%	-14%	-30%
Q1 2024 vs Q1 2025	-12%	-5%	-13%

Note: The figures in Chart 1 and Table 2 are based on data from centres reporting in all respective quarters (n=105 member centres).
Note: Any students under the age of 18 who are studying on courses for adults are recorded as 'adult' (the course type overrides the date of birth of the student).

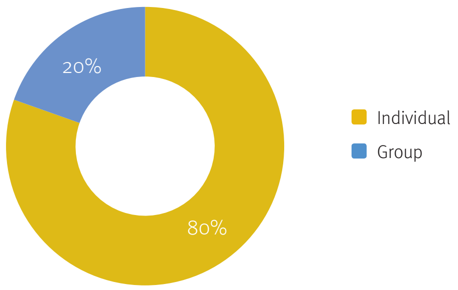
Chart 2
Student weeks by booking source



n=126 member centres participating in Q1 2025

In the first quarter of 2025, commissionable bookings remained the most common source, accounting for 76% of total student weeks. Compared to Q1 2024, the biggest growth in commissionable weeks came from Türkiye (+3,373 weeks).

Chart 3
Student weeks by booking type



n=126 member centres participating in Q1 2025

In Q1 2025, most bookings were made by individual students. They were 80% of all bookings, and group bookings were 20%.

Based on a like-for-like comparison, in Q1 2019, individual bookings made up 81% of the total, decreasing to 79% in Q1 2024 and further to 78% in Q1 2025.

Note: 'Group' is defined as at least two students travelling and studying on the same itinerary.

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General overview

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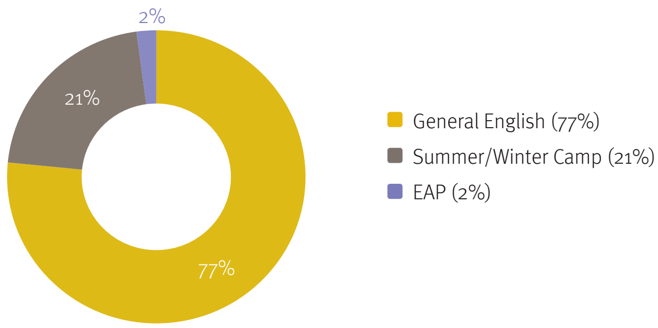
Chart 4

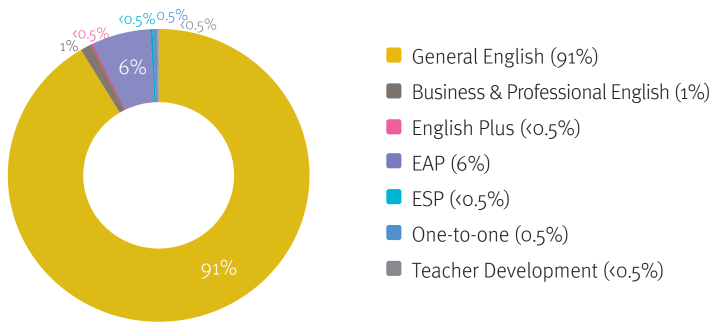
Student weeks by junior course types



n=126 member centres participating in Q1 2025

Chart 5

Student weeks by adult course types



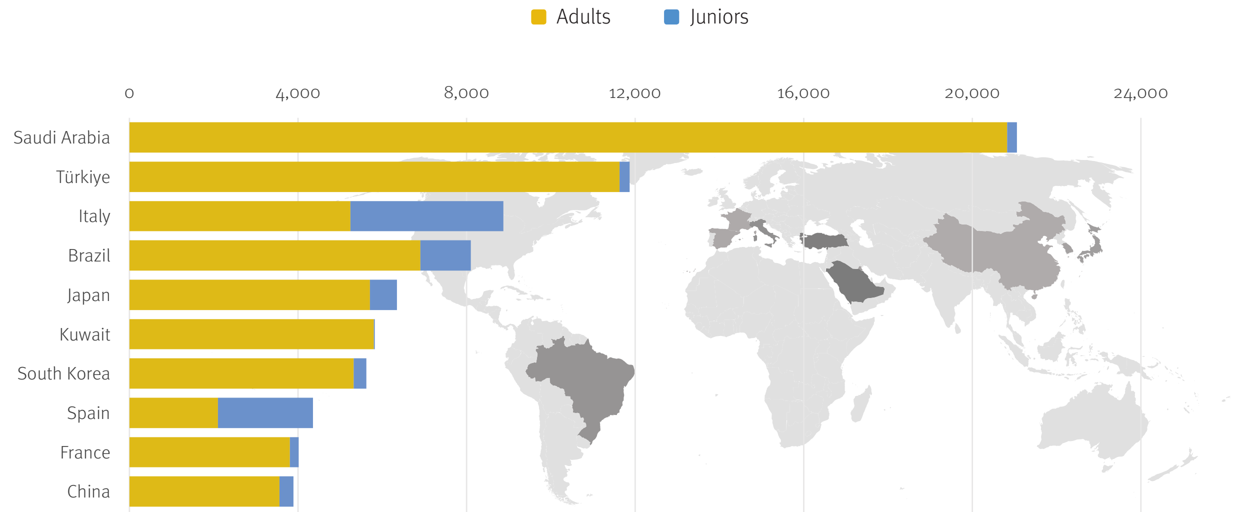
n=126 member centres participating in Q1 2025

General English courses remained the most popular course type, accounting for 77% of junior student weeks and 91% of all adult student weeks in Q1 2025.

General English was the only junior course type registering year-on-year decline compared to Q1 2024. Most of this drop came from Colombia and Chile. With a 13% drop, General English for adults saw a similar year-on-year decline. Saudi Arabia, Brazil and Kuwait were the source markets driving this drop.

Chart 6

Student weeks by age group and source country (top 10 markets)



n=126 centres participating in Q1 2025

In Q1 2025, the top 10 source countries generated 69% of all student weeks.

Saudi Arabia remained the leading source market in Q1 2025, with 21,055 student weeks. However, despite its top position, Saudi Arabia saw a drop of 3,792 student weeks compared to Q1 2024, based on like-for-like data.

Brazil recorded the second largest drop among the top 10 markets, and as a result, it fell from 2nd to 4th position compared to Q1 2024.

Just two of the top 10 markets registered year-on-year growth. Türkiye showed the most significant increase, adding 2,578 student weeks, and rising from 3rd to 2nd place.

As in previous quarters, the Middle East remained the top source region with 43,200 student weeks, holding a 37% share.

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