QUARTERLY INTELLIGENCE COHORT

Q2 2025

English language students in the UK each quarter

Executive summary

ENGLISH UK

BONARD

QUIC QUARTERLY INTELLIGENCE COHORT

Student statistics report Q2 2025

Prepared on behalf of:

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

Prepared by:

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

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 Q2 2025, 125 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.

www.englishuk.com/quic
statistics@englishuk.com

General overview

Q2 2025 at a glance

Table 1
QUIC region summary

Region	**No.** of returns	**Proportion** of returns	**Total** weeks	**Market** share
		%	Σ	%
South and South Eastern England	40	28.0	26,550	22.2
London	38	26.6	38,019	31.8
Northern England	23	16.1	22,436	18.7
South West England and the Channel Islands	18	12.6	14,636	12.2
Eastern England	13	9.1	12,333	10.3
Scotland and Northern Ireland	6	4.2	2,828	2.4
Central England and Wales	5	3.5	2,920	2.4
Total	**143**	**100.0**	**119,721**	**100.0**

Note: 143 of 234 teaching centre locations reported student weeks in Q2 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 125 UK member centres subscribed to QUIC 2025, representing 234 premises. Of these, 143 were operational in Q2 2025, marking a 2% increase compared to Q2 2024. Together, they registered a total of 119,721 student weeks.

In both Q2 2023 and Q2 2024, the sector achieved a recovery rate of 81% compared to 2019. However, due to declines in both adult and junior segments, the overall recovery in Q2 2025 dropped to 68% of the 2019 volume.

Chart 1

Like-to-like comparison of student weeks by quarter

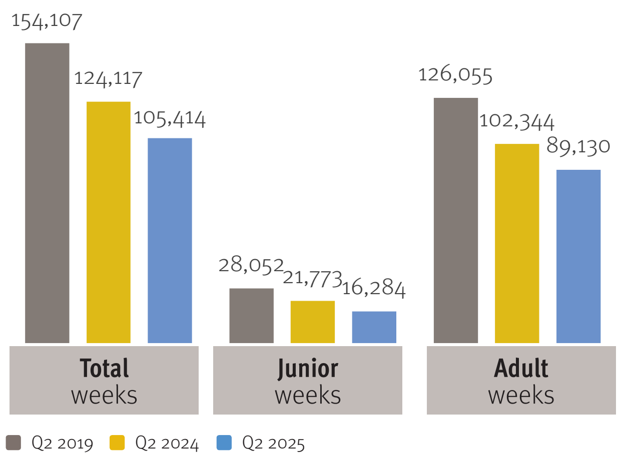
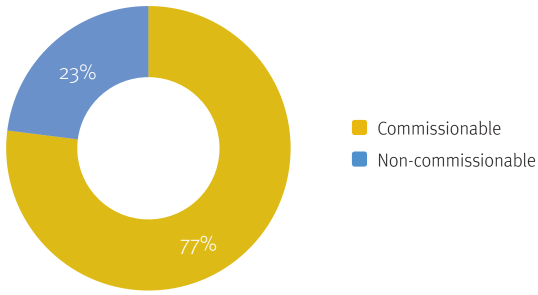


Chart 2

Student weeks by booking source



n=125 member centres participating in Q2 2025

Commissionable bookings accounted for 77% of all bookings, with the remaining 23% being non-commissionable. A like-for-like comparison across three comparable periods—Q2 2019, Q2 2024, and Q2 2025—shows that the share of commissionable bookings has remained stable at 79%.

Student weeks only slightly surpassed Q1 2025 levels (+3%), indicating a slower seasonal build-up than usual. In a like-for-like comparison, reporting centres recorded a 15% decrease in total student weeks between Q2 2024 and Q2 2025. Junior student weeks dropped by 5,489 (-25%), while adult student weeks declined by 13,214 (-13%).

Table 2

Year-on-year change in student weeks

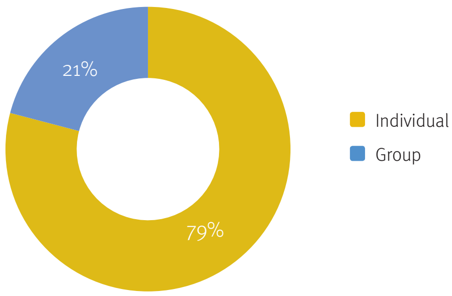
	Total weeks	**Junior** weeks	**Adult** weeks
Q2 2019 vs Q2 2025	-32%	-42%	-29%
Q2 2024 vs Q2 2025	-15%	-25%	-13%

Note: The figures in Chart 1 and Table 2 are based on data from centres reporting in all respective quarters (n=104 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 3

Student weeks by booking type



n=125 member centres participating in Q2 2025

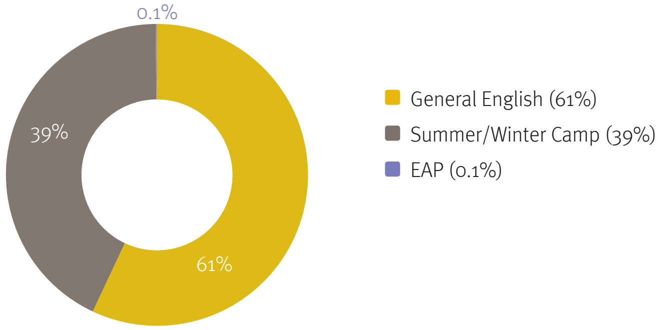
In Q2 2025, individual student bookings comprised the majority, representing 79% of the total, whereas group bookings accounted for the remaining 21%. Compared to Q2 2024, Türkiye recorded the largest increase in both individual and group bookings (+1,672 weeks and +300 weeks, respectively).

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

General overview

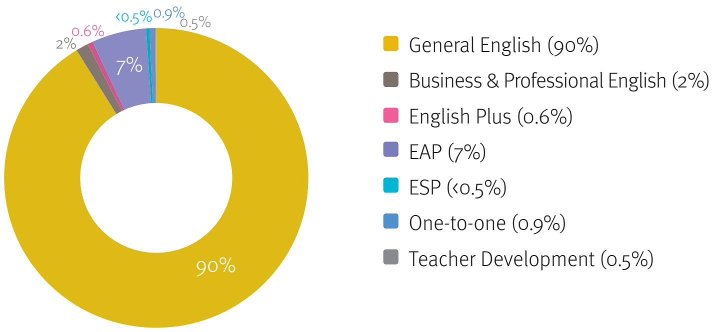
Q2 2025 at a glance

Chart 4
Student weeks by junior course types



n=125 member centres participating in Q2 2025

Chart 5
Student weeks by adult course types



n=125 member centres participating in Q2 2025

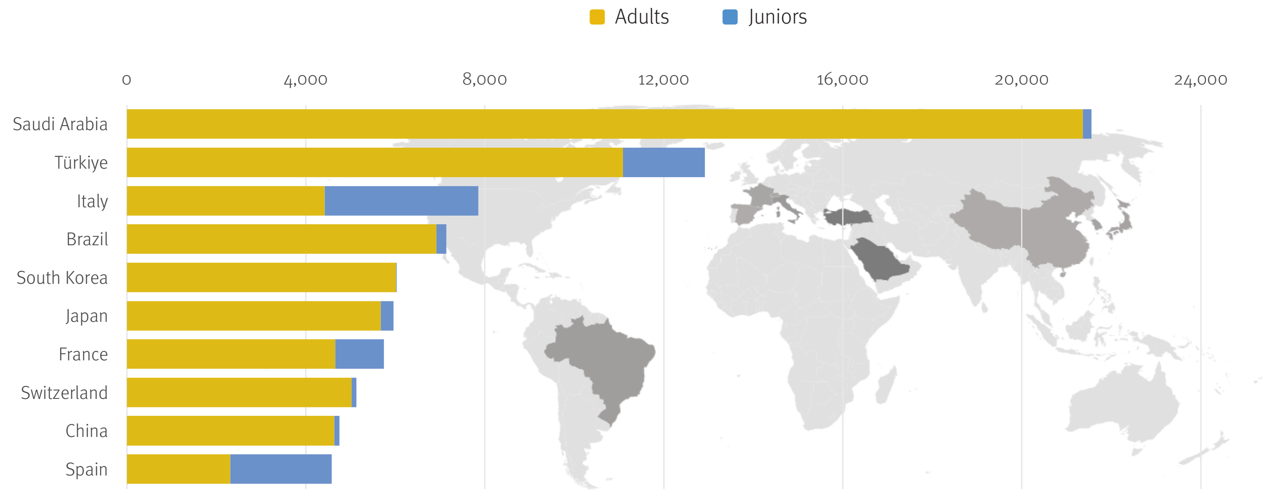
In Q2 2025, General English remained the most popular course type, accounting for 61% of junior and 90% of adult enrolments.

All junior course types recorded a decline between Q2 2024 and Q2 2025, based on like-for-like comparison.

The largest drop in junior weeks spent in General English course came from Spain, followed by Austria and Colombia.

Among adult courses, five out of seven categories saw a decline in Q2 2025 compared to Q2 2024.

Chart 6
Student weeks by age group and source country (top 10 markets)



n=125 centres participating in Q2 2025

In Q2 2025, the top 20 source countries generated 89% of all student weeks, a slight increase from 88% in Q2 2024.

Saudi Arabia continued to rank as the top source market in Q2 2025, accounting for 21,555 student weeks. Despite its leading position, the market maintained the downward trend seen in Q1 2025, with a like-for-like decrease of 2,647 student weeks compared to Q2 2024.

Türkiye maintained its position as the second-ranked source country and showed the strongest year-on-year growth (+1,971 weeks).

Overall, the top five source countries — Saudi Arabia, Türkiye, Italy, Brazil, and South Korea — retained their positions from Q2 2024.

As in previous quarters, the Middle East remained the leading source region in Q2 2025, generating 40,422 student weeks and accounting for 34% of the total.

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