QUIC
QUARTERLY
INTELLIGENCE
COHORT

Q3 2025

English language students in the UK each quarter

Executive summary

ENGLISH UK

BONARD

QUIC QUARTERLY INTELLIGENCE COHORT

Student statistics report Q3 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 Q3 2025, 125 member centres participated, representing 42% 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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General overview

Q3 2025 at a glance

Table 1
QUIC region summary

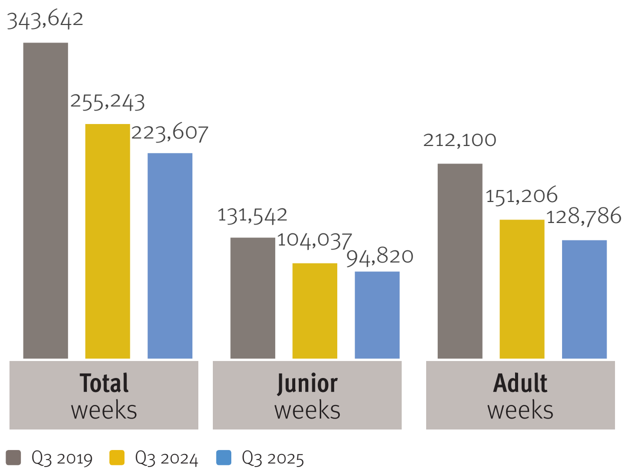
Region	**No.** of returns	**Proportion** of returns	**Total** weeks	**Market** share
		%	Σ	%
South and South Eastern England	64	28.7	71,394	27.2
London	58	26.0	80,077	30.6
Northern England	33	14.8	39,863	15.2
South West England and the Channel Islands	27	12.1	31,224	11.9
Eastern England	24	10.8	26,102	10.0
Central England and Wales	12	5.4	8,443	3.2
Scotland and Northern Ireland	5	2.2	4,977	1.9
Total	**223**	**100.0**	**262,079**	**100.0**

Note: 223 of 232 teaching centre locations reported student weeks in Q3 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 232 teaching premises. Of these, 223 were operational in Q3 2025 - the same number as in Q3 2024. Collectively, these centres delivered 262,079 student weeks in Q3 2025.

Chart 1

Like-to-like comparison of student weeks by quarter



Based on a like-for-like comparison, reporting centres saw an overall 12% decline in student weeks compared with Q3 2024. Junior weeks fell by 12,598 (-9%), while adult weeks dropped by 23,795 (-15%) between Q3 2024 and Q3 2025.

Table 2

Year-on-year change in student weeks

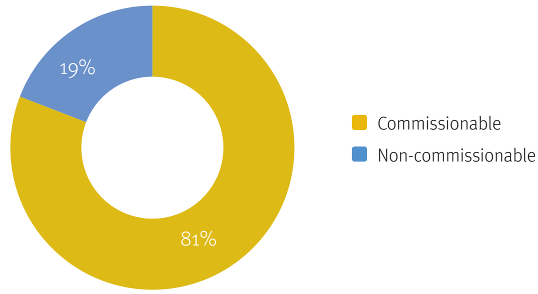
	Total weeks	**Junior** weeks	**Adult** weeks
Q3 2019 vs Q3 2025	-35%	-28%	-39%
Q3 2024 vs Q3 2025	-12%	-9%	-15%

Note: The figures in Chart 1 and Table 2 are based on data from centres reporting in all respective quarters (n=103 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).

When compared with Q3 2019, total student week volumes reached 65% of their 2019 level, with adult volumes recovering to 61% and junior volumes to 72% of their respective 2019 levels. Overall recovery was slower than in Q1 and Q2 2025, when it reached 71% and 68%, respectively.

Chart 2

Student weeks by booking source

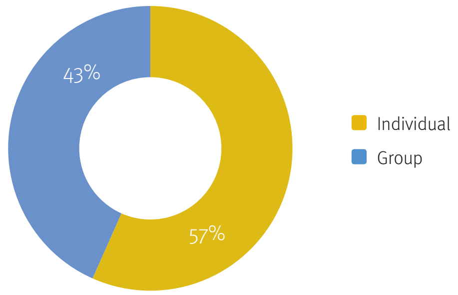


n=125 member centres participating in Q3 2025

In Q3 2025, commissionable bookings made up 81% of the total, with the remaining 19% classified as non-commissionable. Like-for-like comparisons reveal that the share of commissionable weeks was slightly higher than in previous years, rising from 80% in both Q3 2024 and Q3 2019 to 81% in Q3 2025.

Chart 3

Student weeks by booking type



n=125 member centres participating in Q3 2025

Group weeks traditionally dominate in the summer. In Q3 2025 they accounted for 43% of the total, with individual weeks making up 57%. Compared with Q3 2024, Türkiye recorded the largest increase in both individual and group bookings, a pattern that remained consistent with Q2 2025.

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

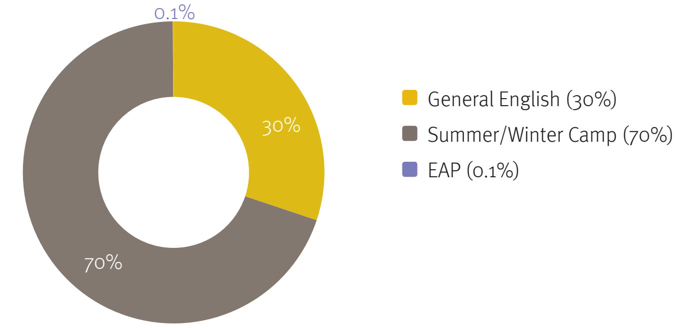
![QUIC Quarterly Intelligence Cohort]

General overview

Q3 2025 at a glance

Chart 4

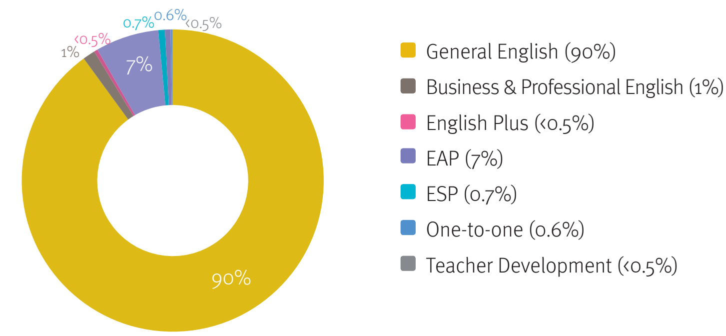
Student weeks by junior course types



n=125 member centres participating in Q3 2025

Chart 5

Student weeks by adult course types



n=125 member centres participating in Q3 2025

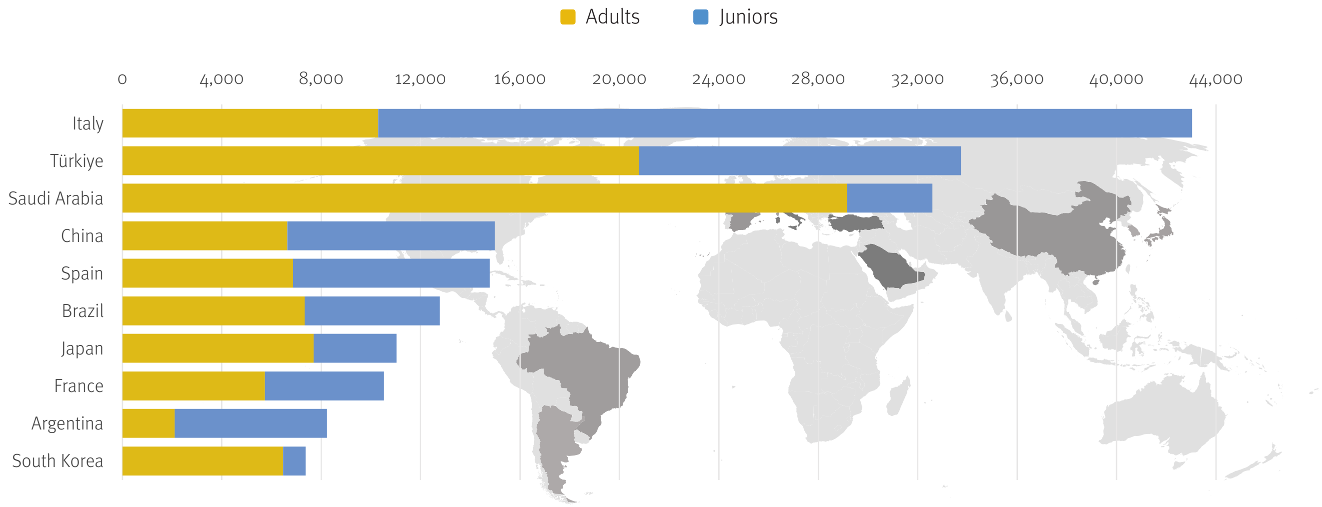
As traditionally observed in Q3, Summer/Winter Camp was the most popular course type for juniors, accounting for 70% of the total juniors weeks.

Based on like-for-like comparison, all junior course types declined compared to Q3 2024. The largest drop in Summer/Winter Camps (-12%) came from China.

For adults, General English remained the most popular course type in Q3 2025, accounting for 90% of total adult weeks. This course type saw a 13% decline, mainly driven by Saudi Arabia, Colombia, and Italy.

Chart 6

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



n=125 centres participating in Q3 2025

In Q3 2025, the top 10 source markets accounted for 72% of all student weeks, the same level as in Q3 2024.

Italy, traditionally the strongest source market in third quarter, retained its leading position with 43,033 student weeks in Q3 2025. This was despite a decline of 7,645 weeks among centres reporting in both Q3 2024 and Q3 2025.

Türkiye, meanwhile, recorded the largest increase among all source markets, adding 5,650 weeks and moving up from 4th to 2nd position.

Italy, Türkiye, China, Spain and Argentina were the top five junior source markets, together representing 57% of all junior student weeks spent in Q3 2025.

As in Q3 2024, Europe led in student weeks in Q3 2025, accounting for 38% of the total, despite declines in key markets. The Middle East recorded the strongest growth, adding 2,975 student weeks compared with Q3 2024.

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