

Q4 2025

Including Q1 - Q4 cumulative summary

English language students in the UK each quarter

[Executive summary](#)

Student statistics report Q4 2025

Prepared on behalf of:



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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 Q4 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

Q4 2025 at a glance

Table 1

QUIC region summary

Region	No. of returns	Proportion of returns	Total weeks	Market share
	📁	%	Σ	%
 London	27	25.5	29,634	33.4
 South and South Eastern England	26	24.5	17,729	20.0
 Northern England	22	20.8	20,196	22.7
 South West England and the Channel Islands	14	13.2	8,135	9.2
 Eastern England	9	8.5	7,572	8.5
 Central England and Wales	4	3.8	2,721	3.1
 Scotland and Northern Ireland	4	3.8	2,825	3.2
Total	106	100.0	88,812	100.0

Note: The number of participating teaching centre locations in Q4 2025 is 221. This number differs per quarter and depends on when seasonal teaching centre locations are operational.

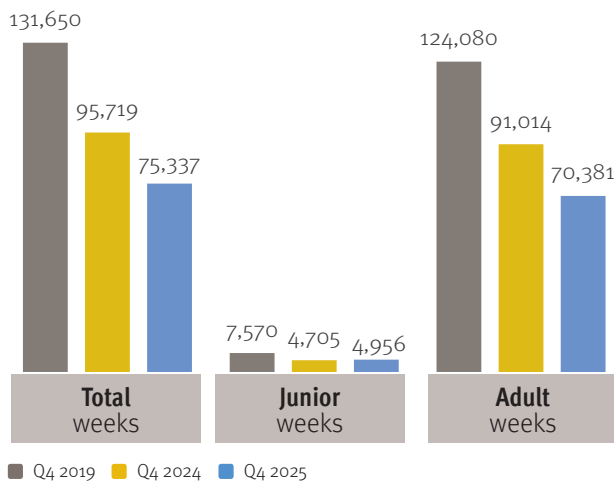
Note: Figures of student weeks per region were rounded and may not add up to the total sum of student weeks.

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

During Q4 2025, 119 UK member centres participated in QUIC, covering 221 teaching centre locations. 106 of these 221 teaching locations were operational, reflecting a like-for-like 2% decrease on Q4 2024. These centres collectively reported a total of 88,812 student weeks.

Chart 1

Like-to-like comparison of student weeks by quarter



A year-on-year comparison shows an overall decline of 21% in student weeks between Q4 2024 and Q4 2025. However, for the first time in 2025, junior student weeks increased, rising by 5%. This growth was mainly driven by higher student weeks from Spain and Chile. In contrast, adult student weeks declined by 23%.

Table 2

Year-on-year change in student weeks

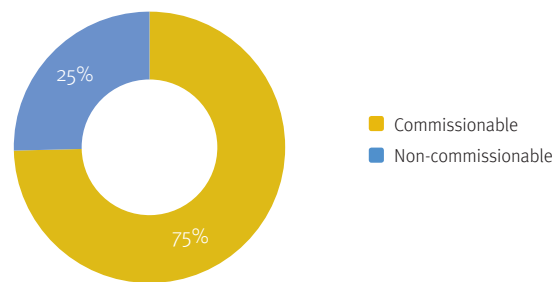
	Total weeks	Junior weeks	Adult weeks
Q4 2019 vs Q4 2025	-43%	-35%	-43%
Q4 2024 vs Q4 2025	-21%	5%	-23%

Note: The figures in Chart 1 and Table 2 are based on data from centres reporting in all respective quarters (n=97 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



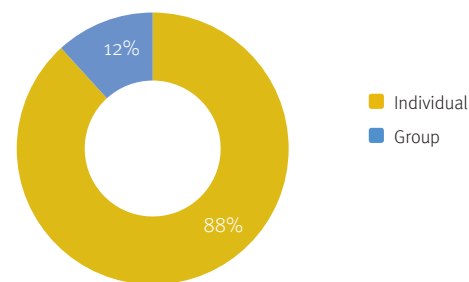
n=119 member centres participating in Q4 2025

In Q4 2025, commissionable student weeks accounted for 75%, while non-commissionable student weeks made up 25%.

A like-for-like comparison across the three comparable periods (Q4 2019, Q4 2024, and Q4 2025), shows a consistent dominance of commissionable weeks in Q4, with small fluctuations of 1–2%.

Chart 3

Student weeks by booking type



n=119 member centres participating in Q4 2025

In Q4 2025, individual bookings accounted for 88% of the total, while group bookings made up 12%.

A year-on-year comparison shows that the share of individual bookings fell by 2% between Q4 2024 and Q4 2025, approaching the level seen in Q4 2019.

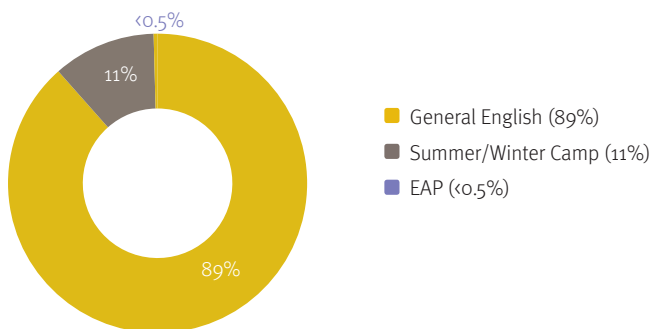
Note: 'Group' is defined as at least two students travelling and studying on the same itinerary.

General overview

Q4 2025 at a glance

Chart 4

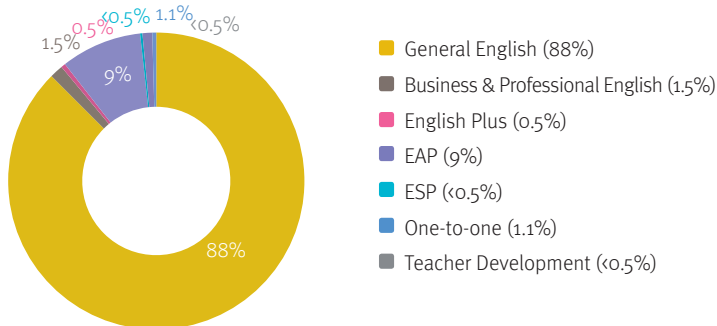
Student weeks by junior course types



n=119 member centres participating in Q4 2025

Chart 5

Student weeks by adult course types



n=119 member centres participating in Q4 2025

General English remained the most popular course type, accounting for 89% of junior enrolments and 88% of adult enrolments in Q4 2025.

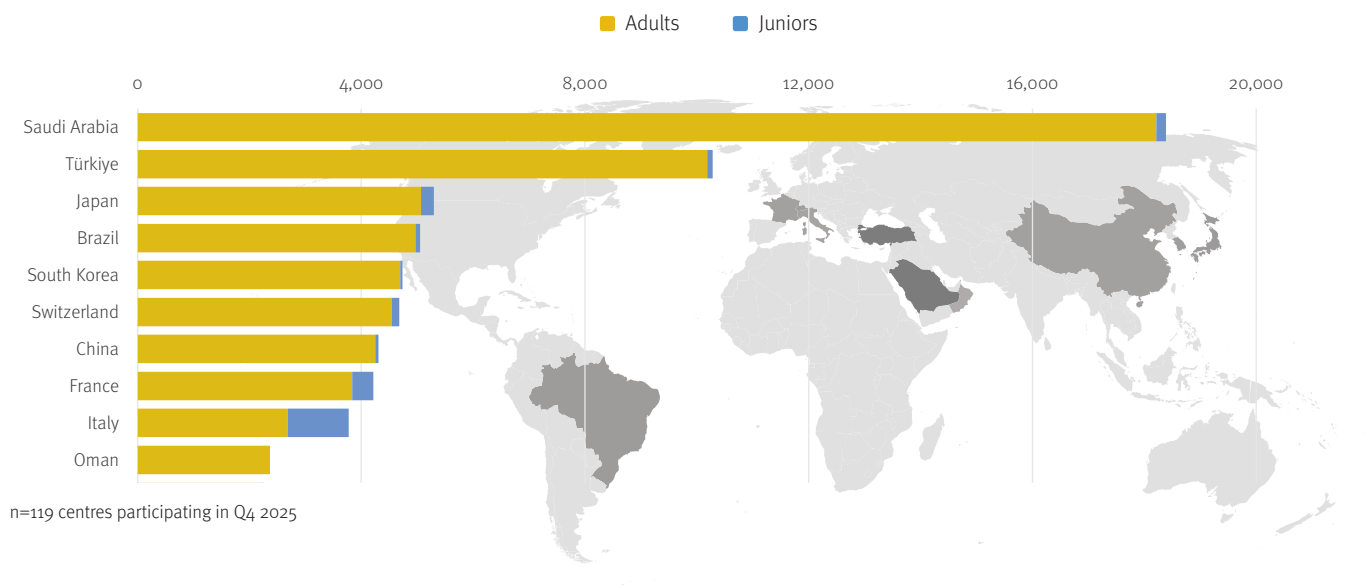
In Q4 2025, junior student weeks increased only in General English, rising 16% compared to Q4 2024. This growth was driven by juniors from Spain and Japan.

For adults, General English experienced a 25% decrease. This decline was mainly driven by Kuwait, followed by Colombia and Saudi Arabia.

In contrast, Business English increased compare to Q4 2024, mainly driven by Japan. After declining throughout 2025, EAP student weeks remained stable in Q4.

Chart 6

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



In Q4 2025, the top 10 source countries continued to account for 72% of total student weeks, which is 1% higher than in Q4 2024.

With 18,388 student weeks, Saudi Arabia was the leading source country, maintaining its position from Q4 2024 despite a year-on-year decline in volume. Türkiye retained second place.

Kuwait and Colombia recorded the steepest declines and consequently exited the top ten.

China saw the largest increase, rising from 11th to 7th place, while Oman also entered the top ten.

The top five source markets for junior student weeks were Italy, Spain, Germany, France, and Chile, which together accounted for 56% of all junior student weeks.

The Middle East remained the overall dominant source region, contributing 38% of total student weeks. Europe was the second-largest, with a 24% share, led by Switzerland, France, and Italy, which together accounted for over half of Europe's total.

2025 summary

Overview

This section presents cumulative data for the full 2025 year. Unless otherwise indicated, the figures relate to data from 119 English UK member centres in QUIC that participated in all four quarters of 2025.

Table 22
QUIC 2025 region summary

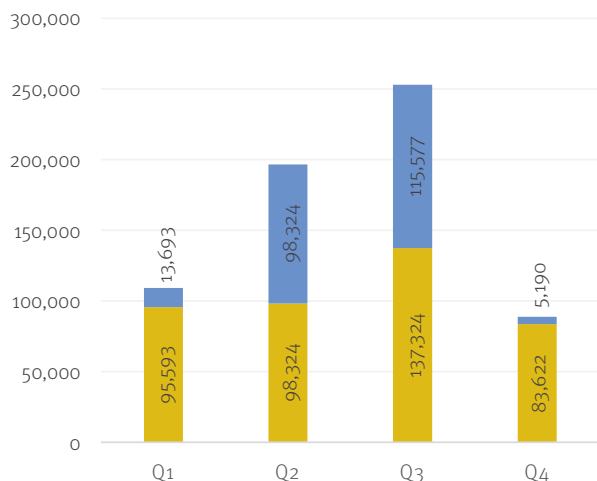
Region	Q1		Q2		Q3		Q4		2024	
	No. of returns	Proportion of returns	No. of returns	Proportion of returns	No. of returns	Proportion of returns	No. of returns	Proportion of returns	No. of returns	Proportion of returns
	📁	%	📁	%	📁	%	📁	%	📁	%
London	30	25.2	38	26.6	58	26.0	27	25.5	153	25.9
South and South Eastern England	29	24.4	40	28.0	64	28.7	26	24.5	159	26.9
Northern England	25	21.0	23	16.1	33	14.8	22	20.8	103	17.4
South West England and the Channel Islands	16	13.4	18	12.6	27	12.1	14	13.2	75	12.7
Eastern England	11	9.2	13	9.1	24	10.8	9	8.5	57	9.6
Central England and Wales	4	3.4	6	4.2	12	5.4	4	3.8	26	4.4
Scotland and Northern Ireland	4	3.4	5	3.5	5	2.2	4	3.8	18	3.0
Total	119	100.0	143	100.0	223	100.0	106	100.0	591	100.0

Note: The number of participating member centres varied by quarter, overall number of centers participating in 2025 was 126.

Note: The number of returns differs per quarter as this is submitted on a 'per teaching premise location' basis and so depends on when teaching centre locations are operational.

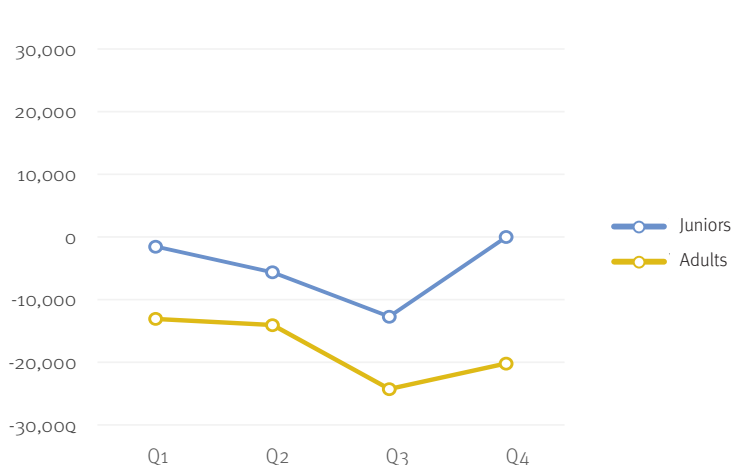
Note: Percentages may not add up to 100% due to rounding.

Chart 11
Student weeks by quarter and age group



Note: The figures in Chart 10 relate to data from centres reporting in four quarters of 2025 (n=119 centres).

Chart 12
Absolute year-on-year change in student weeks (2024 vs 2025)



Note: The figures in Chart 11 relate to a like-to-like comparison, which is based on data from centres participating in both 2024 and 2025 (n=114 centres).

Chart 13

Student weeks by quarter and booking source

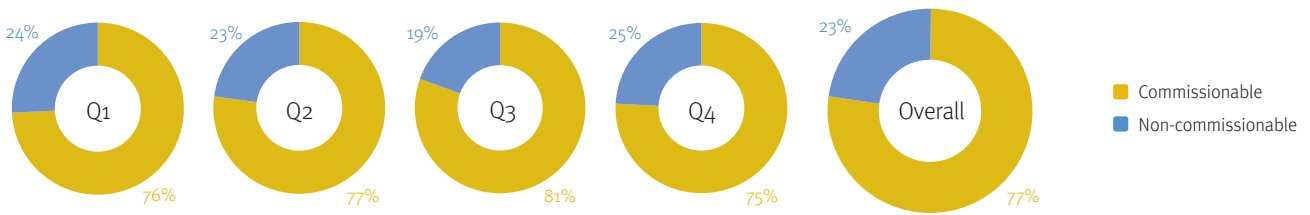


Chart 14

Student weeks by quarter and booking type

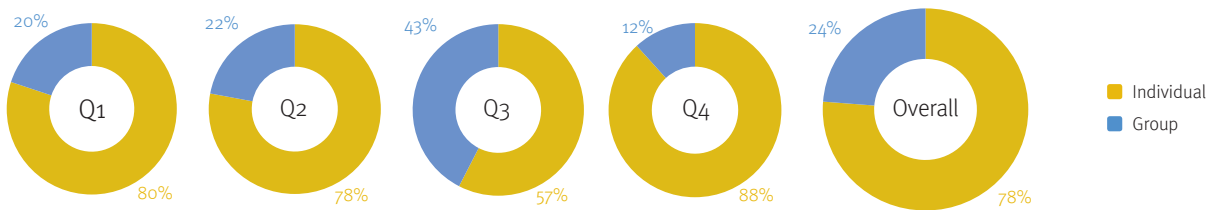


Chart 15

Junior student weeks by quarter and course types

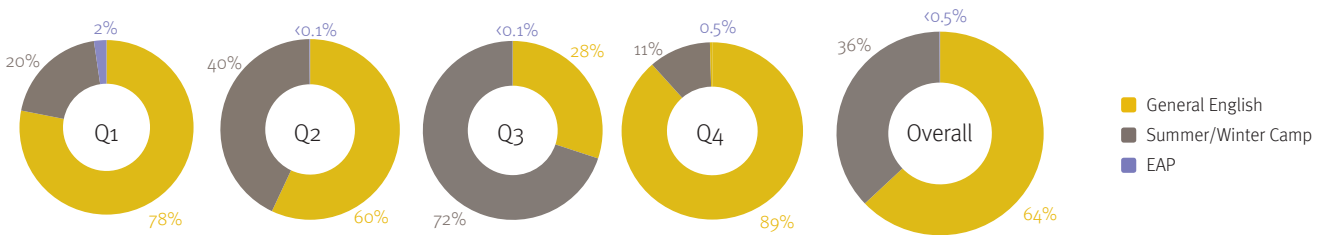
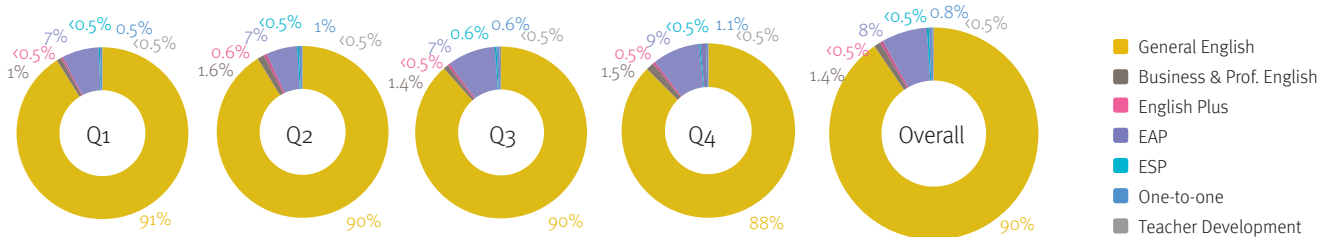


Chart 16

Adult student weeks by quarter and course types



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

Note: The figures in Charts 12, 13, 14 and 15 relate to data from centres reporting in four quarters of 2025 (n=119 centres).



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