2026 student statistics report

The global position of the UK ELT sector in 2025

ENGLISH UK

BONARD

Global context report

The global position of the UK ELT sector

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Purpose, scope and method

This 'The global position of the UK ELT sector in 2025' report complements English UK's 'Student statistics report 2026: English language students in the UK 2025' by placing the performance of English UK member centres within the wider international ELT market.

While the Student statistics report 2026 examines student volumes, source markets and study patterns at English UK member centres, this report takes a broader view. It compares the UK's performance with other major English language study destinations and explores how the UK's global position is changing as international ELT mobility evolves.

What this report covers

The analysis focuses on eight major ELT destinations:

Australia
Canada
Ireland
Malta
New Zealand
South Africa
the UK
the USA

It compares performance in student numbers and student weeks. It also considers differences in adult and junior mobility and examines the UK's position within key international source markets.

Why this report is published later

This report is published after the Student statistics report 2026 because comparable national data for major ELT destinations become available at different points during the year. Publishing later allows the UK's 2025 performance to be assessed against a more complete picture of global ELT activity.

How this report differs from the English UK's annual student statistics report

Figures in this report may differ from those in English UK's Student statistics report 2026.

The annual student statistics report is based on data submitted by English UK member centres. The international comparisons in this report use estimates of the wider UK ELT sector so that comparisons with other destination countries are as consistent as possible.

As a result, this report focuses on trends, relative performance and the UK's position within the global ELT market rather than direct comparisons with member-centre data.

Sources and approach

The report uses national ELT statistics published by sector associations and other recognised industry sources across the eight destinations. Where comparable data is not available, BONARD uses primary research and market intelligence to support international comparisons.

The analysis also takes account of differences in how destinations collect and report data. These methodological differences have been considered when interpreting the findings.

Global ELT Overview

The UK in the Global Context

The global English language teaching (ELT) market recorded a second consecutive year of decline in 2025. Across the eight major ELT destinations, 901,877 students studied English and generated 5,820,300 student weeks. The destinations were Australia, Canada, Ireland, Malta, New Zealand, South Africa, the UK and the USA.

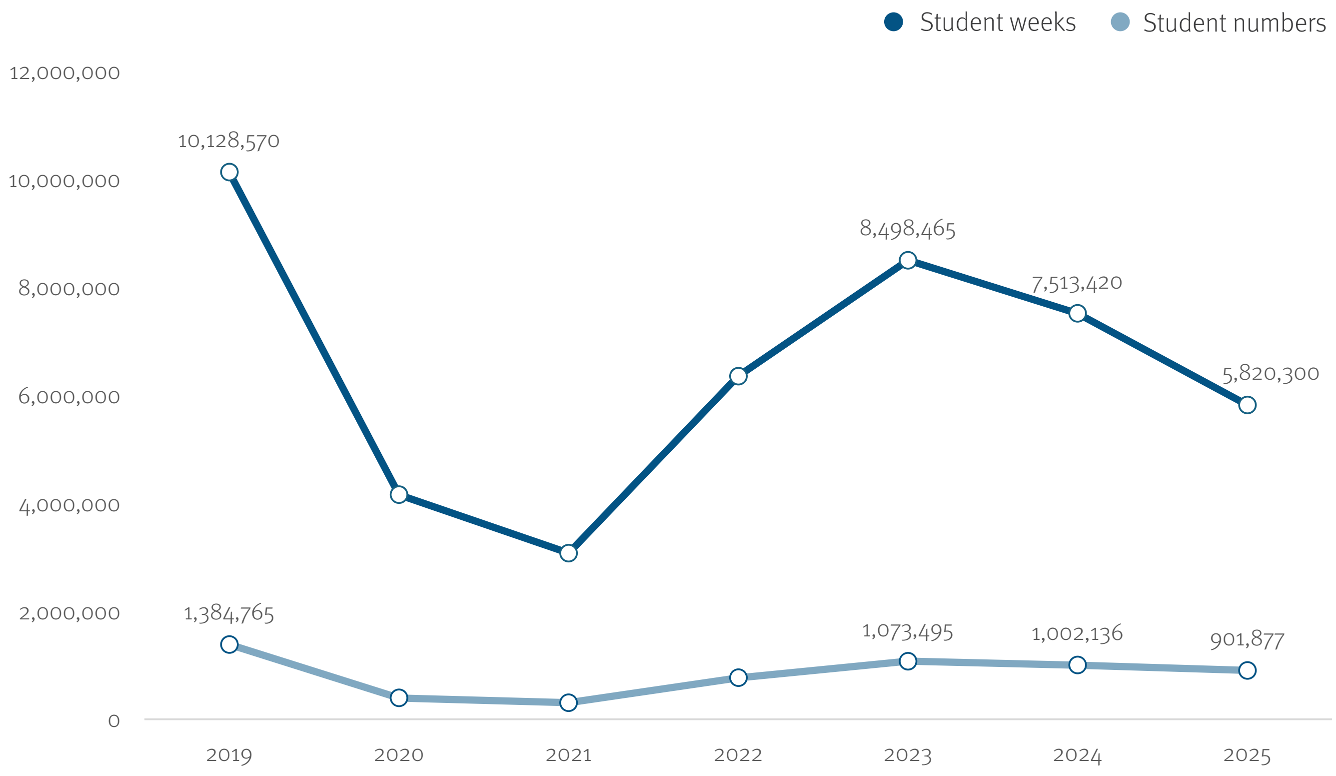
Compared with 2024, student numbers declined by 10%, while student weeks fell considerably faster, by 23%. This followed declines of 7% and 12% respectively in 2024, marking a clear change in direction from the strong growth recorded in 2023. The slowdown had already become visible in 2024 as tighter immigration policies and economic pressures affected several major destinations.

The widening gap between student numbers and student weeks highlights an important shift in the market. Fewer students are travelling and study patterns are changing. Longer-duration adult programmes have come under greater pressure, while shorter programmes and junior students are becoming relatively more important. This shift was already visible in 2023 and 2024, when the junior share increased across several destinations.

Government policies and affordability pressures are the two most important factors in this decline. Changes to visa and immigration policy, particularly in Australia and Canada, have affected access to longer-term study programmes. Cost concerns have led to students choosing shorter courses, different study destinations or online programmes.

These factors increasingly influence whether students travel, where they choose to study and how long they stay.

Chart 1: Total number of students and student weeks spent in major English language destinations



Source: BONARD, 2026; EduSA, 2025; English Australia, 2025; English New Zealand, 2025; English UK, 2025; English USA, 2025; Institute of International Education, 2021; Languages Canada, 2025; English Education in Ireland, 2025; NSO Malta, 2025;

Chart 2: English language students by destination

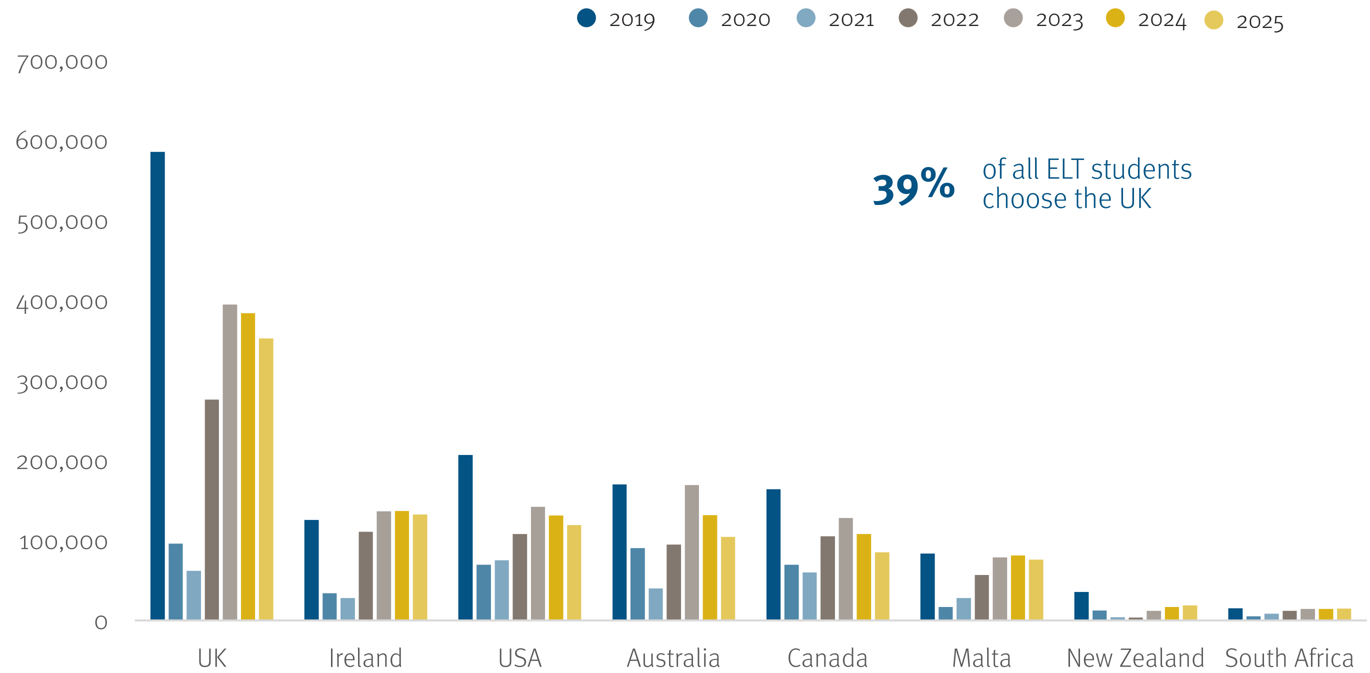
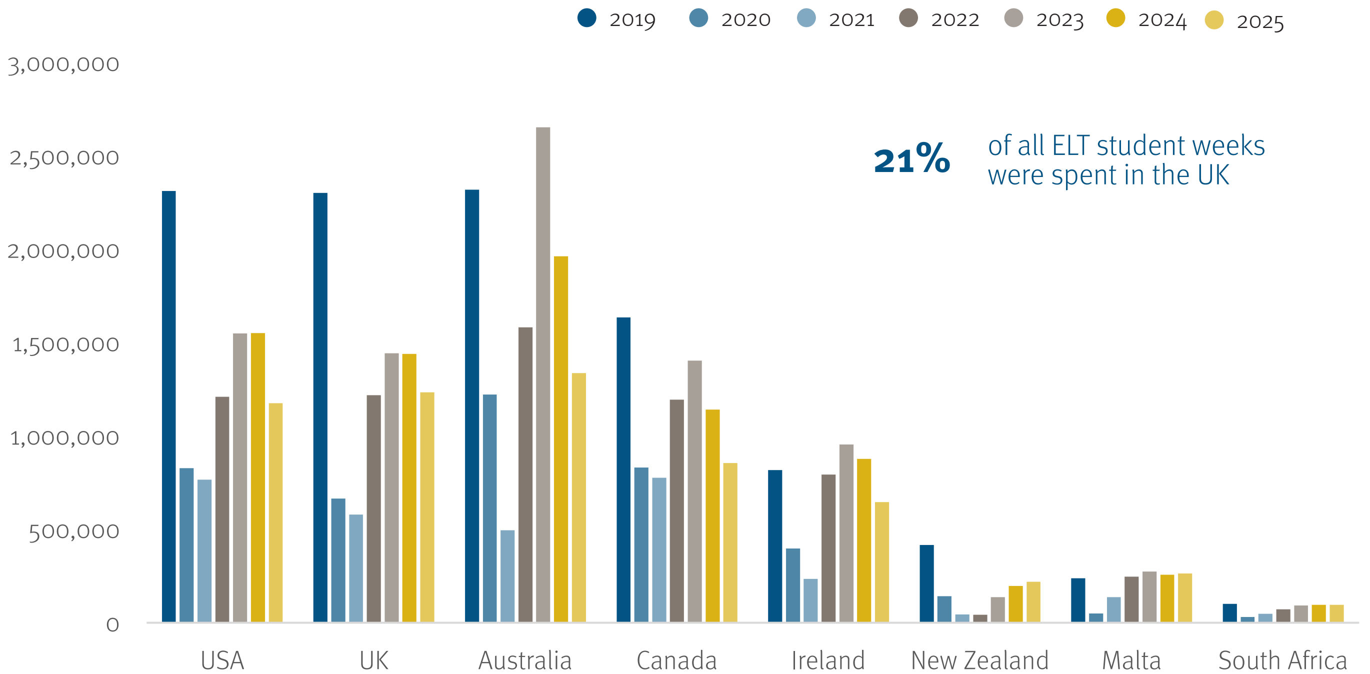


Chart 3: Student weeks by destination



Source: BONARD, 2026; Figures represent extrapolations based on multiple sources. They cover all centres in the destinations and represent the best possible calculation, rather than a headcount.

Global ELT Overview

Student mix: adults and juniors

Chart 4: Adult to junior ratio across destinations (student numbers)

Source: English Australia, 2025; English UK, 2025; English USA, 2025; Languages Canada, 2025; English Education in Ireland, 2025; NSO Malta, 2025

The balance between adult and junior students varies considerably across ELT destinations. Among the six destinations for which comparable adult/junior data are available, the UK has the highest share of juniors, accounting for 62% of students in 2025, followed by Ireland at 57%.

In contrast, adults continue to dominate in Australia, Canada and the USA, representing 89%, 87% and 80% of students respectively.

The UK's junior share has increased from 54% in 2022 to 62% in 2025. However, this increase reflects a decline in adult mobility as well as resilience in the junior market. Fewer adult students have accelerated the shift in the overall student mix.

This brings a different set of challenges, but also opportunities.

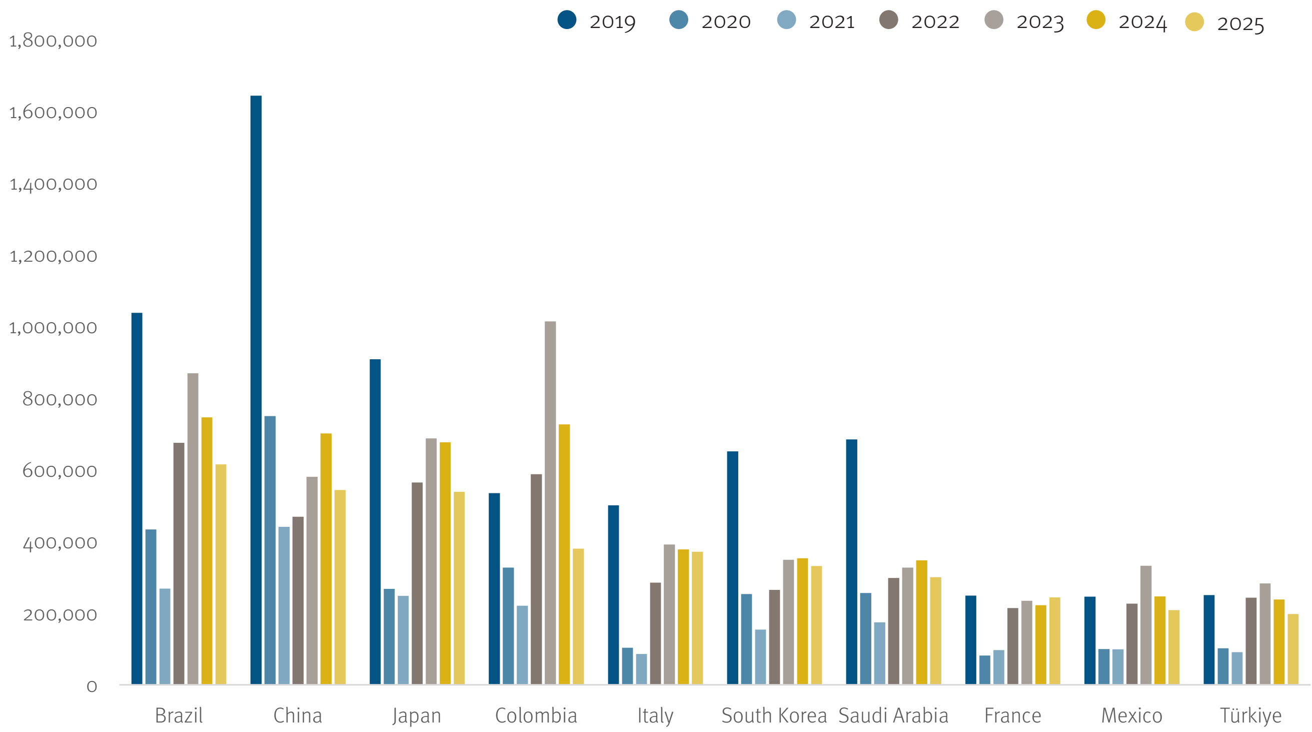
Junior programmes are typically much shorter, meaning that higher student numbers do not generate the same volume of student weeks as adult programmes. Providers may therefore be serving more students, with the additional operational demands this brings, while generating fewer weeks of study. However, junior programmes are typically offered as packages that include accommodation, activities, excursions and other services, creating greater opportunities to generate revenue per student per week.

At the same time, juniors are likely to play an increasingly important role in the future of UK ELT. The UK's established position in this segment is a clear strength, but the changing student mix means that student numbers alone will become a less useful measure of success. Programme duration, capacity and value generated per student will become increasingly important.

Global ELT Overview

UK's market share in top markets

Chart 5: Top 10 source markets for the ELT sector globally (student weeks)



Source: BONARD, 2026; EduSA, 2025; English Australia, 2025; English New Zealand, 2025; English UK, 2025; English USA, 2025; Institute of International Education, 2021; Languages Canada, 2025; English Education in Ireland, 2025; NSO Malta, 2025;

Weakness in 2025 was widespread across the largest global ELT source markets. Nine of the ten largest markets by student weeks recorded a decline, with France the only market to grow, increasing by 10% to 243,889 weeks.

The largest decline was recorded in Colombia, where student weeks fell by 48%, following particularly strong growth in 2022 and 2023. Between 2024 and 2025, China declined by 22% and Japan by 20%. Brazil became the world's largest ELT source market, despite an 18% decline to 614,982 student weeks. Türkiye, Mexico and Saudi Arabia also recorded substantial falls of 17%, 16% and 14% respectively.

There were important differences in resilience. Italy declined by 2% and South Korea by 6%, while France moved against the wider trend with growth of 10%. The decline was widespread across the sector's largest source markets rather than being driven by one or two countries.

This global picture provides an important benchmark for assessing the UK's performance. A decline in UK volumes from an individual source market does not necessarily represent a loss of competitive position if that market is also declining globally. Comparing the UK's performance against broader market trends of each source market therefore provides a clearer view of where the UK is gaining or losing share.

Global ELT Overview

UK's market share in top markets

Table 1: UK's market share in Asia in 2023 and 2025 (ranked by volume in student weeks)

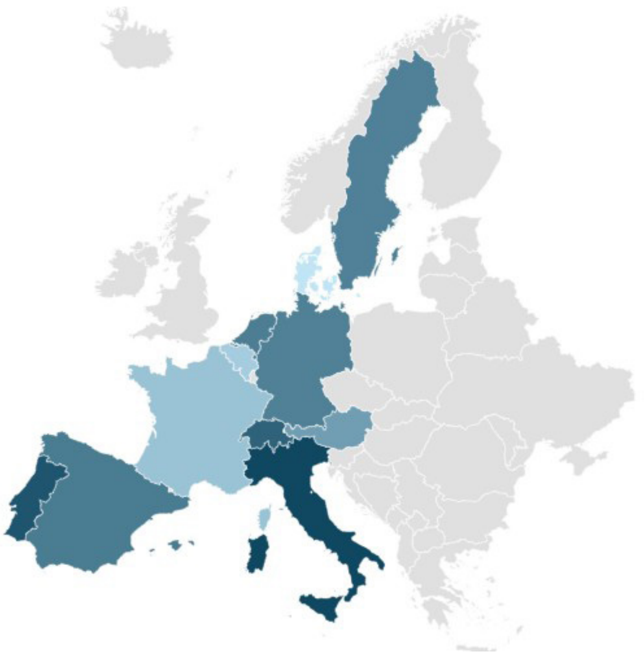
Country	UK's market share 2023	UK's market share 2025
China	12%	12%
Japan	10%	10%
South Korea	11%	12%
Taiwan	12%	11%
Thailand	9%	12%
Hong Kong	14%	26%
Kazakhstan	38%	32%
Uzbekistan	26%	46%
Vietnam	1%	2%
Georgia	60%	52%
Mongolia	1%	2%
Azerbaijan	33%	41%

Table 2: UK's market share in LATAM in 2023 and 2025 (ranked by volume in student weeks)

Country	UK's market share 2023	UK's market share 2025
Brazil	9%	9%
Colombia	4%	7%
Argentina	26%	34%
Mexico	6%	12%
Chile	10%	13%
Peru	8%	12%
Ecuador	4%	5%
Uruguay	24%	34%
Venezuela	4%	11%

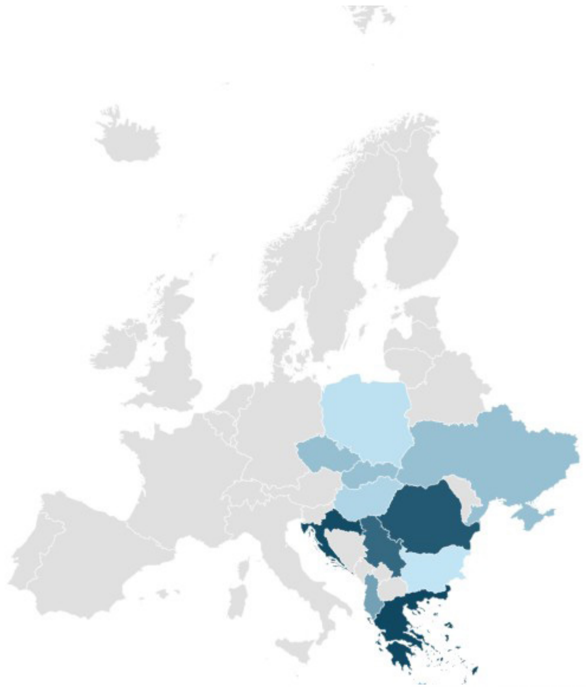
Source: BONARD, 2026

Table 3: UK's market share in Western Europe in 2023 and 2025 (ranked by volume in student weeks)



Country	UK's market share	
	2023	2025
Italy	55%	49%
Spain	34%	38%
France	30%	24%
Switzerland	49%	43%
Germany	42%	37%
Austria	37%	31%
Belgium	28%	22%
Portugal	52%	46%
Sweden	36%	37%
Netherlands	33%	38%
Denmark	33%	17%

Table 4: UK's market share in Eastern Europe in 2023 and 2025 (ranked by volume in student weeks)



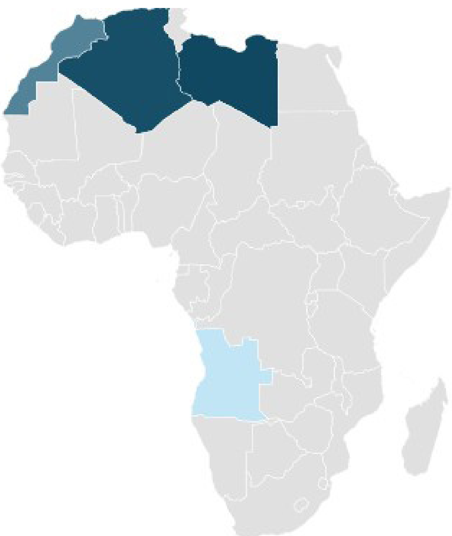
Country	UK's market share	
	2023	2025
Russia	14%	28%
Poland	35%	23%
Ukraine	25%	35%
Czechia	37%	35%
Romania	75%	72%
Greece	56%	78%
Slovakia	37%	34%
Albania	37%	46%
Hungary	35%	27%
Bulgaria	62%	22%
Serbia	64%	66%
Croatia	69%	77%

Source: BONARD, 2026

Table 5: UK's market share in the Middle East in 2023 and 2025 (ranked by volume in student weeks)

Country	UK's market share 2023	UK's market share 2025
Saudi Arabia	56%	55%
Türkiye	25%	56%
Kuwait	50%	73%
Oman	89%	82%
Israel	84%	71%
Iran	9%	19%
UAE	27%	14%
Qatar	81%	63%
Iraq	18%	63%
Syria	60%	60%

Table 6: UK's market share in Africa in 2023 and 2025 (ranked by volume in student weeks)



Country	UK's market share 2023	UK's market share 2025
Libya	38%	44%
Algeria	53%	43%
Morocco	24%	32%
Angola	17%	13%

Source: BONARD, 2026

Global ELT Overview

Outlook for the UK

The UK enters 2026 in a relatively strong global position. Although the sector declined in 2025, it performed better than several other major ELT destinations and remained the largest market by student numbers. Among the mature ELT destinations, the UK's competitive position has stayed comparatively stable despite the wider decline in international mobility.

The source-market analysis also shows that the UK increased its share in a number of markets between 2023 and 2025, particularly across Latin America and parts of the Middle East and Eastern Europe. However, these gains need to be interpreted carefully, as a larger market share does not always mean higher student volumes. In many cases the overall source market has become smaller. The UK is capturing a larger proportion of demand in some markets while competing within a reduced overall pool of internationally mobile ELT students.

With many established source markets under pressure, competition is likely to focus more on protecting and growing market share than on overall market growth. The UK's ability to defend its position in large established markets, while taking advantage of opportunities where destination preferences are changing, will therefore be central to its performance.

The UK's strong position in the junior segment provides an important advantage. Juniors already account for 62% of UK students and have proved relatively resilient as adult mobility has weakened. However, this changing student mix brings its own challenges. Shorter stays mean that strong junior headcounts do not generate the same volume of student weeks, while larger numbers of short-stay students create different pressures around accommodation, staffing, capacity and programme delivery.

Adult demand therefore remains important to the overall volume and value of the sector. English UK's 2025 member data similarly show adults accounting for 67% of student weeks despite juniors representing 62% of students.

2026 is likely to remain challenging for the UK ELT sector. Affordability pressures continue as the cost of travel, accommodation and studying abroad rises, while geopolitical instability, particularly in the Middle East, creates further uncertainty around an important source region for the UK. Early 2026 data from English UK's quarterly intelligence scheme (QUIC) also indicate that UK ELT volumes remain under pressure.

At the same time, students have more choice, including lower-cost regional destinations and English language provision closer to home. The UK remains well positioned compared with many of its competitors. However, that does not necessarily mean a return to volume growth. Maintaining that position will increasingly depend on protecting and growing share within contracting or changing source markets, retaining adult demand where possible, and adapting to a market increasingly shaped by shorter stays and junior mobility.

In this changing market, the focus will increasingly need to shift from pursuing higher student volumes towards maximising the value of existing demand, with profitability and long-term sustainability becoming more important measures of success.

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The national association for accredited English language teaching centres.
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