Annual Report on English Language Training in Ireland 2024

English Education Ireland

BONARD EDUCATION

Annual Report on English Language Training in Ireland • 2024

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Foreword

Dear Members and Readers,

It is a pleasure to present the 2024 Annual Report on English Language Training in Ireland, the most comprehensive overview of our sector to date. This edition comes at a time when the global landscape of English Language Education continues to shift, shaped by economic headwinds, evolving student expectations, and a more competitive international marketplace. Yet, amid these challenges, Ireland's English Language Education (ELE) sector has once again demonstrated its resilience, adaptability, and enduring appeal.

This year's data tells a story of cautious stability. While overall student numbers remained steady and above pre-pandemic levels, a decline in student weeks reflects a growing trend toward shorter stays. The increase in Mini-stays signals strong demand for group-based, immersive experiences, while adult learners continue to choose Ireland for longer-term study, driven by quality education, cultural appeal, and the warmth of our welcome.

The sector's direct contribution of nearly €800 million to the Irish economy in 2024 is a powerful reminder of the value of international education to Ireland. Beyond this, international students generate extensive indirect benefits: they spend across the wider economy, support the tourism and transport sectors, and contribute to the workforce in areas such as hospitality, homecare, and other essential services. Their presence strengthens local communities, sustains regional economies, and enriches Irish society as a whole.

We are especially grateful to the 60 member schools who participated in this survey, and to BONARD for their continued partnership in ensuring that this report meets the highest standards of analysis and international benchmarking. Your collaboration ensures that policy-makers, stakeholders, and partners have access to clear, credible, and actionable data.

As we look ahead, the need for coordinated advocacy, clear immigration pathways, and a supportive regulatory environment is more important than ever. English Education Ireland remains committed to representing our schools, promoting Ireland as a premier study destination, and ensuring that quality remains at the heart of everything we do.

Thank you for your continued engagement and support.

Warm regards,

Lorcan O'Connor Lloyd

CEO, English Education Ireland

Introduction

2024: A new narrative

English Education Ireland (EEI; formerly Marketing English in Ireland, MEI) is the largest and longest-standing association of quality-accredited English language schools in Ireland. Each year, the organisation provides a comprehensive analysis of the English language education (ELE) sector, focusing on data from international students studying English in the country and evaluating the sector's direct economic contribution.

To bring a global perspective and make an international comparison for providers in Ireland, EEI commissioned BONARD to conduct the sector survey for 2024. BONARD is a global market intelligence and strategic advisory firm with expertise in international education. It is an individual member of ESOMAR, the World Association for Market, Opinion and Social Research.

In addition to survey administration, BONARD contributes global data on the English language teaching (ELT) industry and benchmarks Ireland's performance across key indicators and source markets.

This edition builds on a foundation of reporting across the ELT sector in Ireland and introduces several unique features for EEI members, including:

- **Overall student numbers and weeks, and year-on-year comparison;**
- **Average course duration;**
- **Student numbers by programme type;**
- **Student numbers by age group;**
- **Student numbers by nationality and year-on-year comparison;**
- **Student numbers by visa requirements;**
- **Booking and recruitment channels;**
- **Provider profiles;**
- **Direct economic impact;**
- **Challenges and expectations.**

Acknowledgments

We extend our sincere gratitude to all EEI member schools that participated in this edition of the survey. Their support and cooperation were instrumental to the success of this project, and we are grateful for their valuable contributions.

EEI and BONARD Teams

Methodology

This report is based on data collected through a sample-based survey of EEI member schools.

As of January 2025, EEI had 63 member institutions, of which 60 participated in the survey, resulting in a strong response rate of 95%. The full population of schools under review for the 2024 reporting year is detailed in Appendix A. This high level of participation ensures strong market representation, allowing for meaningful insights to support strategic planning and sectoral decision-making.

Data collection was conducted online between January 29th and March 7th, 2025.

Participating schools submitted data on international students who commenced studies during the 2024 calendar year, along with performance indicators.

To ensure data accuracy, individual schools were contacted for verification as needed. All data has been anonymised and aggregated for reporting to preserve the confidentiality of individual responses.

Students are described in terms of their participation in the following broad programmes:

- **Ministays** (formerly Stage or Closed Programmes) (typically, a group aged 12–16 staying off season)
- **Junior Programmes** (typically, 12–17-year-olds staying one or two weeks)
- **High School Programmes** (typically, 12–18-year-olds staying during term time)
- **Adult Programmes** (at least 18 years old)

Key methodological updates

The 2024 survey introduced several changes from previous years:

- The "Stage / Closed Programme" category was renamed "Ministays";
- The report introduces a year-on-year comparison as like-for-like comparison;
- New questions were added to capture:
- Booking and recruitment channels;
- Expanded economic impact indicators, including:
- Average weekly student expenses by category;
- Availability of optional paid services;
- Challenges faced by schools in 2024.

Where year-on-year comparisons are presented, they are based on a consistent, like-for-like sample of 55 schools that participated in both the 2023 and 2024 surveys.

2024 Executive Summary

63
EEI members

2024

International student numbers:

128,761
students in 2024

+2%
Year-on-year change (%)

109%
Pre-pandemic recovery level

Total student weeks:

826,928
student weeks spent in 2024

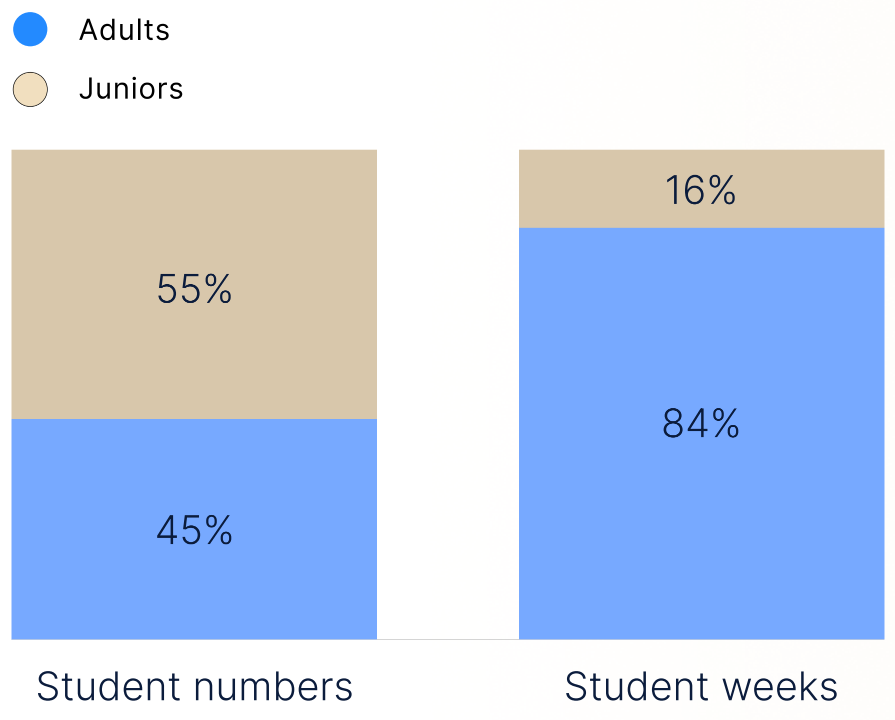
-8%
Year-on-year change (%)

107%
Pre-pandemic recovery level

ELE sector direct economic impact in 2024:

€792
million

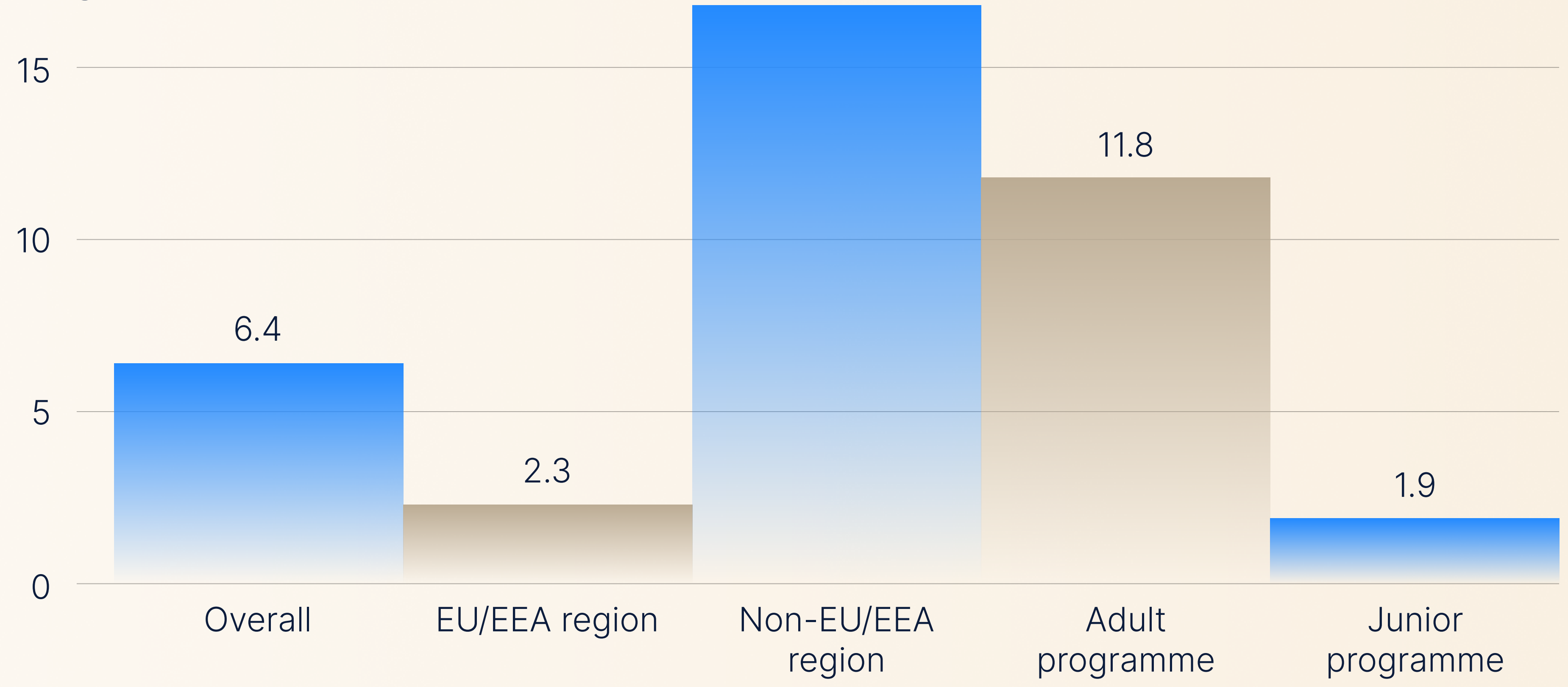
Adult-to-junior ratio:



Top source markets by student weeks

1. Brazil
2. Italy
3. Mexico
4. Spain
5. Chile
6. Mongolia
7. China
8. Panama
9. France
10. Türkiye

Average course duration (weeks)



Market Overview:
Ireland at a Glance

In 2024, member schools hosted a total of 128,761 international English language students from over 125 countries. These students spent a combined 826,928 weeks studying English in Ireland. Following a strong rebound in 2023, the sector did not see significant growth in 2024, but student volumes remained above pre-pandemic levels.

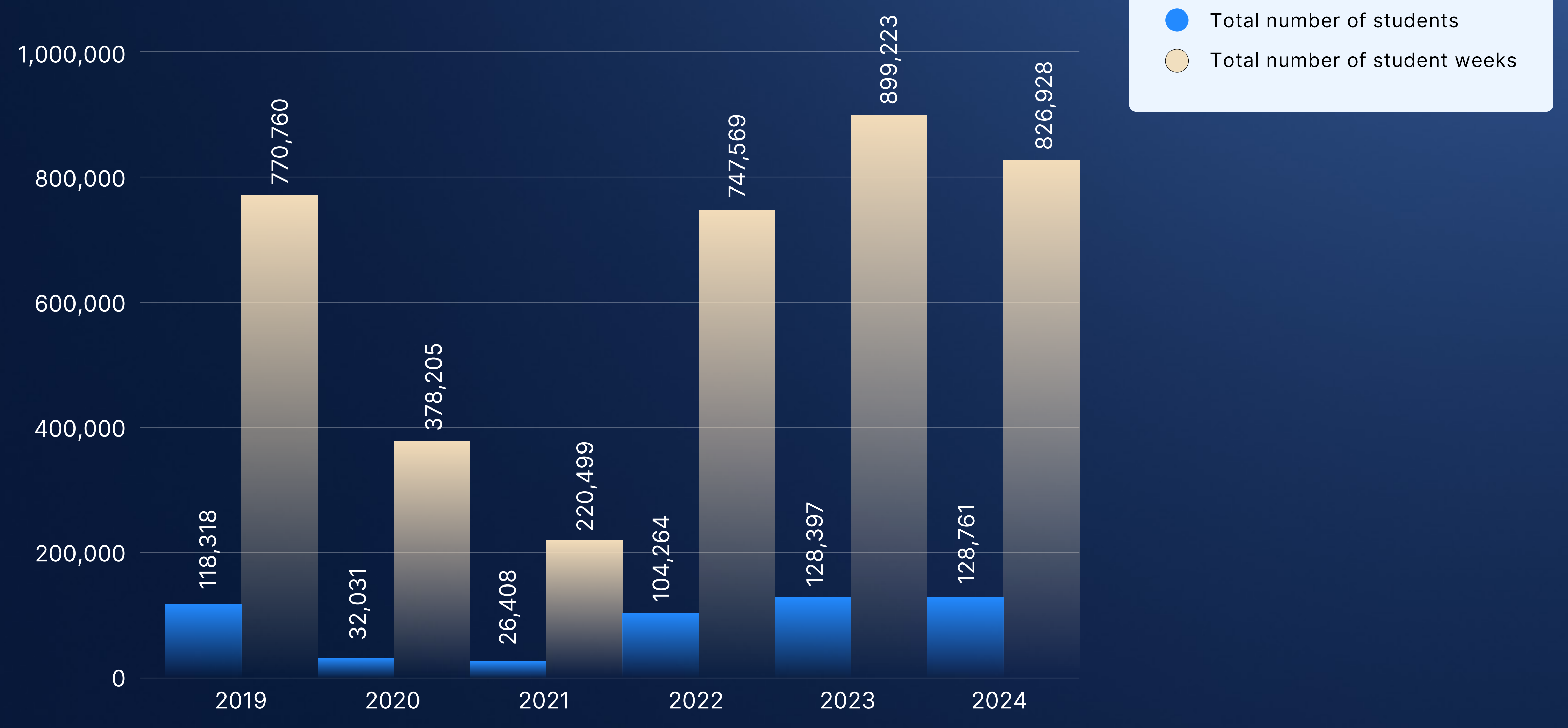
Overall, student numbers grew slightly—by 2%—year-on-year, based on a like-to-like sample of schools reporting in both 2023 and 2024.

This growth was primarily driven by the Ministays segment and increased enrolments from EU/EEA countries, especially Italy, Spain, Germany, and Poland.

Globally, in 2024, many traditional ELT destinations experienced government intervention and high visa refusal rates. As a result, student flows have shifted away from these countries, with learners increasingly opting for alternative destinations, such as the Philippines and Dubai. This trend highlights an untapped opportunity for Ireland to attract a greater number of English language students.

In 2024, the total volume of student weeks declined by 8%, with the average length of stay falling by 9%. This was primarily due to the growing popularity of Ministays—by nature, a shorter-term option—as well as a reduction in student weeks from key source markets: Türkiye (accounting for 39% of the overall decline), Spain (20%), and Bolivia (20%).

Overall number of English language students and student weeks taught by EEI member schools 2019–2024



NOTE: : 2019–2023 data is sample-weighted; 2024 reflects reported volumes.

Average course duration (weeks)

Market Overview:
Ireland at a Glance

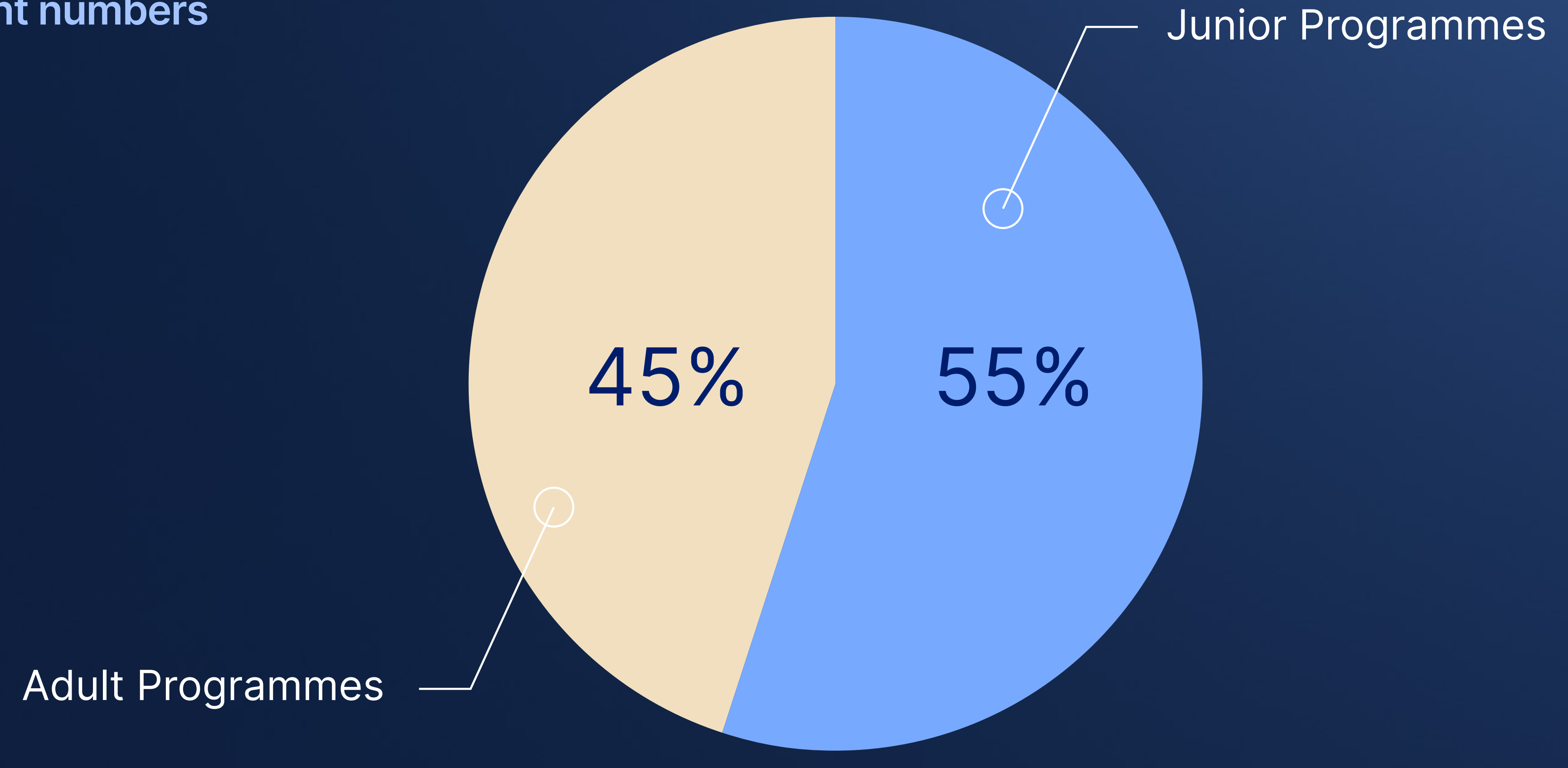
The ELT sector in Ireland is traditionally driven by junior students (under-18s). In 2024, the adult-to-junior ratio was 45% to 55%, as in 2019. As junior students tend to stay for shorter periods, this segment accounted for 16% of all student weeks spent in Ireland in 2024.

Programmes offered to ELT students by EEI members in 2024

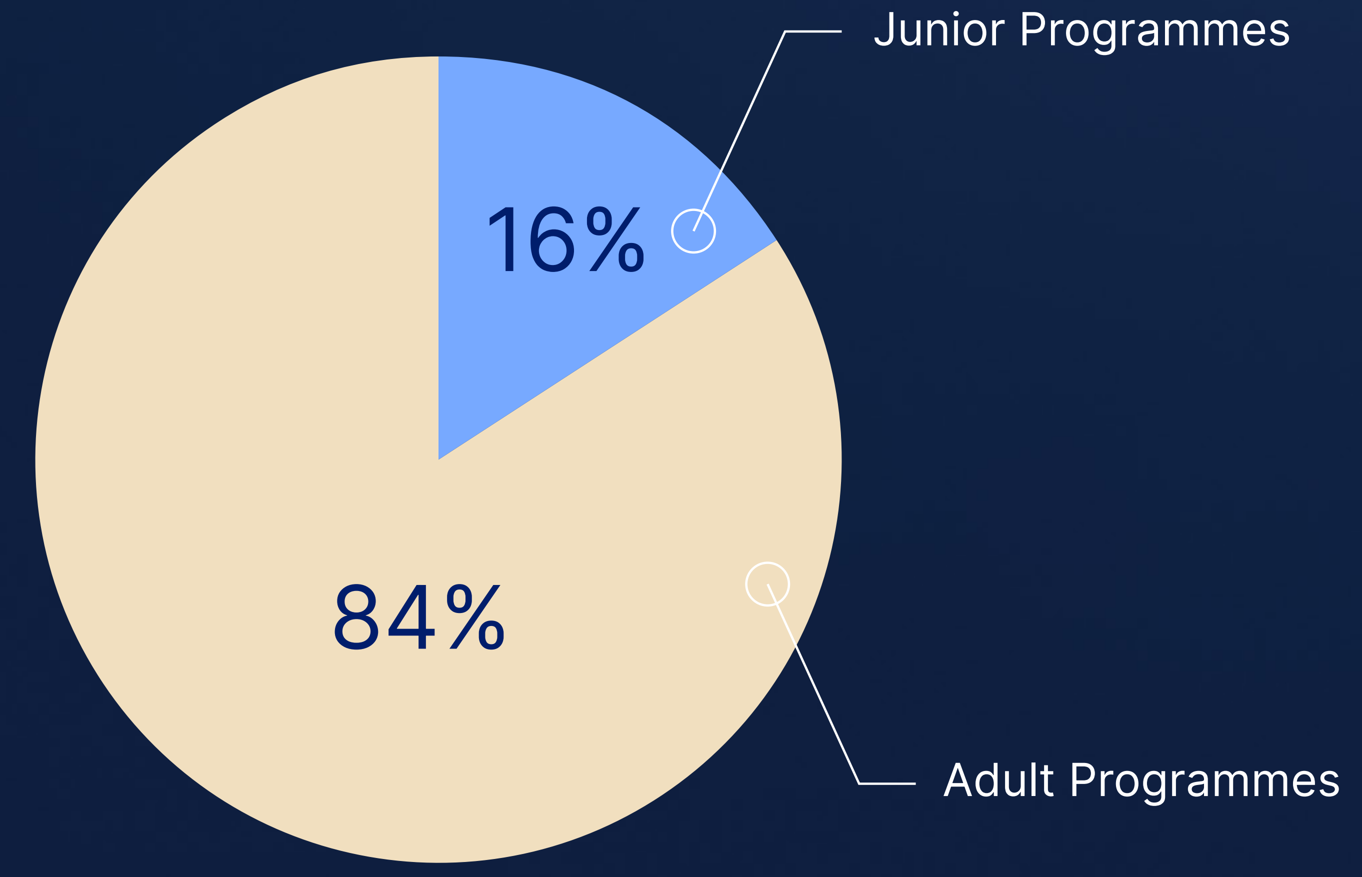
	Share of students (%)	Share of student weeks (%)
Junior Programmes	**55%**	**16%**
Ministays	35%	6%
Junior Programmes	18%	6%
High School Programmes	2%	4%
Adult Programmes	**45%**	**84%**

Programmes offered to ELT students by EEI members in 2024

Student numbers



Student weeks



NOTE: n=60 members

Market Overview: **Ireland at a Glance**

In terms of regional distribution, Western Europe remained the primary source region, accounting for 70% of total student numbers, with an average stay of 2.3 weeks per student. Latin America (LATAM) followed, contributing 19% of students, who tended to stay longer, for an average of 18.4 weeks.

Although students from Asia and the Middle East represented a smaller share of student numbers, their average length of stay was comparatively high, at 14.5 weeks.

In terms of school-level engagement, more than 70% of institutions enrolled students from Western Europe and LATAM, while Eastern Europe and Africa were active recruitment regions for 47% and 32% of schools, respectively.

Source regions of English language students in 2024

	Share student numbers (%)	Student numbers	Student weeks	Average course duration (weeks)	Share of schools' reported nationalities (%)
Western Europe	70%	89,655	203,672	2.3	72%
Eastern Europe	3%	3,763	14,156	3.8	47%
LATAM	19%	24,511	451,460	18.4	70%
Asia	6%	7,294	106,634	14.6	60%
The Middle East	2%	2,654	37,132	14.0	63%
Africa	<1%	565	9,595	17.0	32%
Other	<1%	319	4,280	13.4	13%

NOTE: n=60 members

Market Overview: **Adult vs Junior Segment**

Junior programmes accounted for 70,339 English language students in 2024, who stayed for an average of 1.9 weeks. Ministays were the most popular programme type, showing positive year-on-year growth in both student numbers (+12%, based on like-for-like comparison) and total student weeks (+10%).

Although smaller in volume, High School Programmes recorded the longest average stay, at 16.3 weeks per student. However, this represented a 26% decrease compared to 2023, when the average stay was 22.5 weeks.

The decline of student weeks in general can be attributed to economic sensitivity, as rising costs, inflation, and currency exchange rate fluctuations have reduced the number of weeks students can afford.

Adult programmes attracted 58,422 students, who collectively generated 691,571 student weeks. Adult students accounted for 84% of all reported weeks in 2024, largely because they tended to come for longer than juniors, with an average stay of 11.8 weeks.

ELT students and student weeks by programmes in EEI member schools (2024)

	Student numbers	Student weeks	Average course duration (weeks)	Change (%) student numbers	Change (%) student weeks
Junior Programmes	70,339	135,357	1.9	+7%	-8%
Ministays	45,022	52,240	1.2	+12%	+10%
Junior Programmes	23,108	47,064	2.0	-3%	-8%
High School Programmes	2,209	36,053	16.3	+3%	-26%
Adult Programmes	58,422	691,571	11.8	-4%	-8%
Total	**128,761**	**826,928**	**6.4**	**+2%**	**-8%**

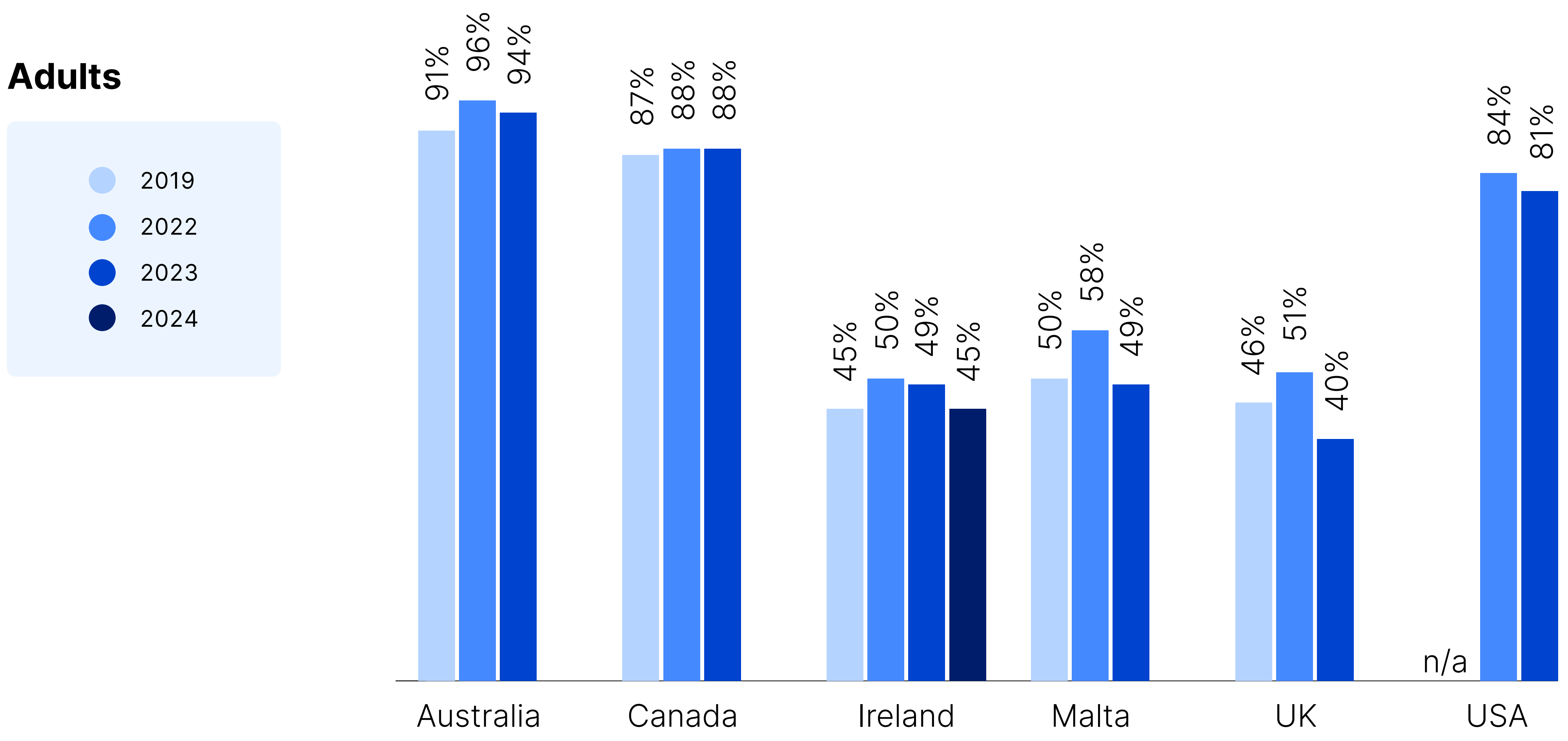
NOTE: n=60 members; Year on year change is based on data from schools reporting both 2023 and 2024, n=55 members

Market Overview:
Adult vs Junior Segment

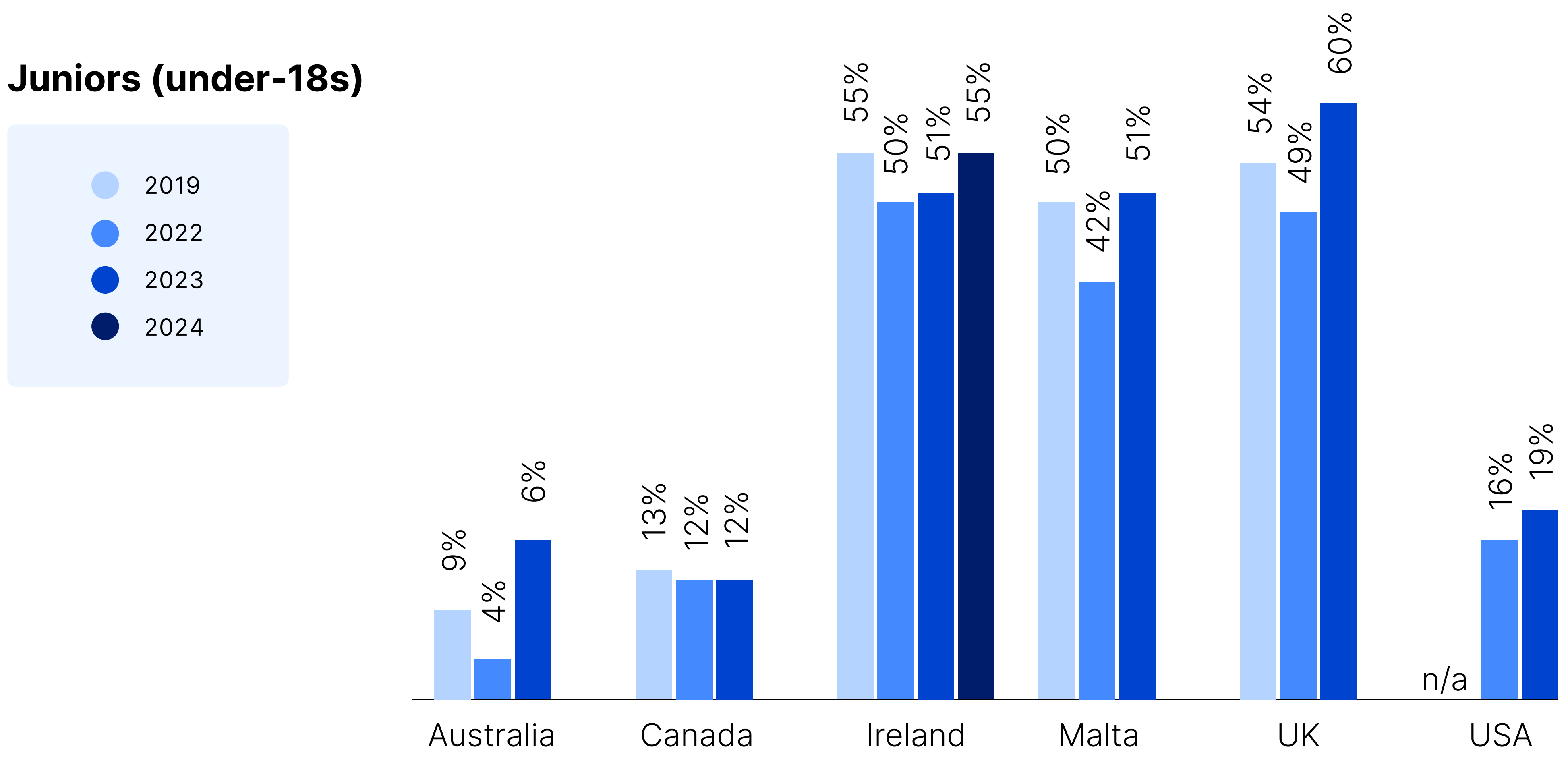
In a global context, Ireland presents a relatively balanced ELT market in terms of the share of adult and junior students, similar to other European destinations such as the UK and Malta. In contrast, ELT sectors in countries like Australia, the USA, and Canada have traditionally catered predominantly to adult learners.

Given that rising levels of English language proficiency have increased local provision and that price sensitivity is growing, the adult segment is expected to continue contracting. Future growth in the ELT sector is likely to be driven by the junior segment.

Adult-to-junior ratio evolution across different destinations



Adult-to-junior ratio evolution across different destinations



SOURCE: English Australia, Languages Canada, EEI, Malta National Statistical Office, English UK, EnglishUSA, 2024

Market Overview:
Adult vs Junior Segment

Italy and Spain were the top source markets for Junior programmes, followed by Germany and France. Students from these markets showed demand for all types of Junior programmes, while Austrian, Mexican, and Chinese junior students showed more interest Ministays, Junior programmes, and High School programmes, respectively.

Brazil and Mexico remained the top source countries for Adult Programmes, reporting the highest total volumes of student weeks, at 251,008 for Brazil and 78,838 for Mexico. While Italy and Spain reported strong student enrolment figures, the average length of stay per student was shorter (2.9 and 4.4 weeks, respectively), resulting in fewer student weeks in total than those from Latin American markets.

Top 10 source markets by ELT student weeks spent in 2024 for Junior programmes combined

	Student numbers (%)	Student weeks	Average course duration (weeks)
Italy	55%	63,839	1.6
Spain	25%	38,557	2.2
Germany	2%	8,607	6.2
France	3%	6,911	2.8
Austria	9%	6,651	1.1
China	0.4%	1,796	6.1
Japan	0.5%	1,430	3.9
Ukraine	0.5%	1,286	3.6
Mexico	0.4%	761	2.5
Argentina	0.5%	735	2.0

NOTE: n=43 members

Top 10 source markets by international student weeks spent in 2024 for Adult programmes

	Student numbers (%)	Student weeks	Average course duration (weeks)
Brazil	23%	251,008	18.9
Mexico	8%	78,838	17.6
Chile	3%	35,162	18.6
Mongolia	3%	34,080	22.0
China	3%	32,075	17.2
Panama	2%	30,486	21.9
Spain	10%	24,656	4.4
Türkiye	3%	23,212	15.2
Italy	12%	20,537	2.9
France	8%	18,620	4.0

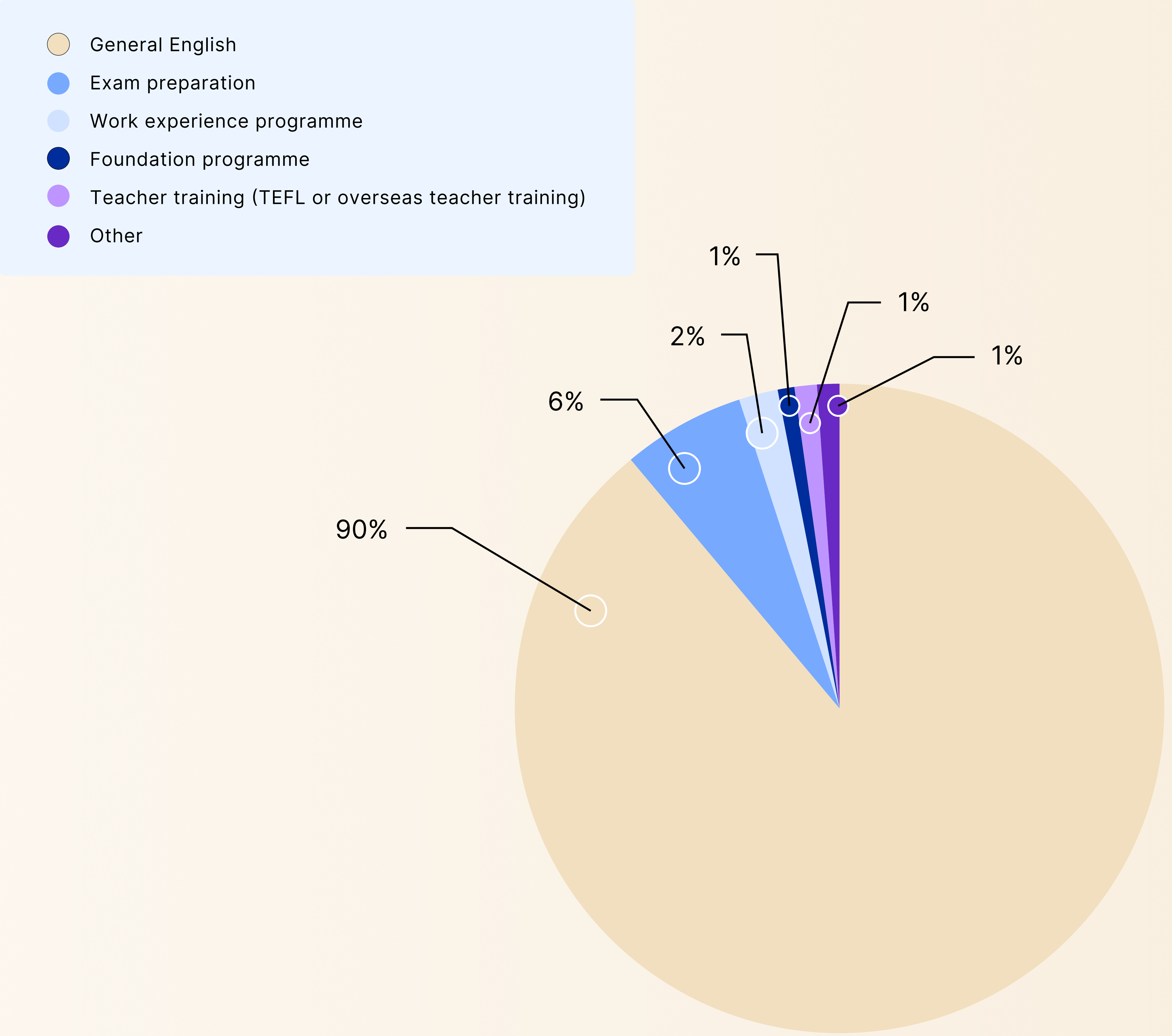
NOTE: n=51 members

Market Overview:
Adult vs Junior Segment

General English continues to be the most popular course type among adult international students, with 90% of reported students enrolling in this programme and an average duration of 12.7 weeks.

Although Exam preparation and Foundation programmes attracted fewer students in 2024, these students stayed for significantly longer periods, on average, at 13.4 and 19.2 weeks, respectively.

Adult programmes by share of student weeks



Adult programmes by share of student weeks and average course duration

	Student weeks share (%)	Average course duration (weeks)
General English	90%	12.7
Exam preparation	6%	13.4
Work experience programme	2%	6.2
Foundation programme	1%	19.2
Teacher training (TEFL or overseas teacher training)	1%	1.5
Other	1%	6.6

NOTE: n=51 members

Market Overview: **Source Markets**

In 2024, the top 10 source markets accounted for 80% of total student volumes and student weeks.

These markets include:

- LATAM countries with visa-free access: Brazil (with 251,201 student weeks in 2024), Mexico (79,598), Chile (35,350), and the fast-growing Panama (30,486)
- EU/EEA countries: Italy (84,376), Spain (63,213), and France (25,531)
- Visa-requiring countries: Mongolia (34,106), China (3,871), and Türkiye (23,375)

Brazil, a top source market for the ELT sector in Ireland since 2014, has yet to regain pre-pandemic levels and has shown a continued annual decline. In 2024, student numbers and student weeks dropped by 7% and 1%, respectively, primarily due to a decline in the junior segment. In contrast, other LATAM markets, such as Mexico, Panama, and El Salvador, recorded year-on-year growth in 2024.

China showed positive momentum across both junior and adult segments in 2024, with a +74% increase in student numbers and +64% growth in student weeks. Key performance indicators for EEI member schools surpassed pre-pandemic levels, marking a strong recovery.

Some emerging growth markets for English language programmes (ELP), particularly outside the EU/EEA, show promising potential for Ireland:

- **Mongolia:** A strong source for the adult segment, with growing junior demand.
- **Japan:** Like Mongolia, Japan continues to generate high volumes of adult students, with junior enrolments and student weeks doubling in 2024 to reach 364 students and 1,432 weeks.
- **Saudi Arabia:** Although it has not yet returned to pre-pandemic levels, this market showed annual growth of +16% in students and +7% in student weeks in 2024.

Top source markets year-on-year change

Source market	Student numbers change (%)	Student weeks change (%)
11. Japan	-6%	-18%
12. Argentina	-2%	-20%
13. Germany	+18%	-12%
14. Saudi Arabia	+16%	+7%
15. El Salvador	+52%	+54%
16. South Korea	-10%	-22%
17. Bolivia	-65%	-67%
18. Taiwan	-10%	+13%
19. Austria	-11%	-19%
20. Colombia	-3%	-2%

NOTE: Year on year change is based on data from schools reporting both 2023 and 2024, n=55 members. The analysis excludes source markets with fewer than 10 schools reporting students in 2024..

Market Overview: **Source Markets**

Top 50 source markets in 2024 by student weeks

Source country	Group	Student numbers	Student weeks	Average course duration (weeks)
1. Brazil	Non-EU/EEA Region (Visa is not required)	13,343	251,201	18.8
2. Italy	EU/EEA Region	45,759	84,376	1.8
3. Mexico	Non-EU/EEA Region (Visa is not required)	4,790	79,598	16.6
4. Spain	EU/EEA Region	23,043	63,213	2.7
5. Chile	Non-EU/EEA Region (Visa is not required)	1,961	35,350	18
6. Mongolia	Non-EU/EEA Region (Visa is required)	1,560	34,106	21.9
7. China	Non-EU/EEA Region (Visa is required)	2,154	33,871	15.7
8. Panama	Non-EU/EEA Region (Visa is not required)	1,391	30,486	21.9
9. France	EU/EEA Region	7,135	25,531	3.6
10. Türkiye	Non-EU/EEA Region (Visa is required)	1,587	23,375	14.7
11. Japan	Non-EU/EEA Region (Visa is not required)	1,811	15,348	8.5
12. Argentina	Non-EU/EEA Region (Visa is not required)	1,242	15,195	12.2
13. Germany	EU/EEA Region	3,932	14,729	3.7
14. Saudi Arabia	Non-EU/EEA Region (Visa is required)	848	11,043	13
15. El Salvador	Non-EU/EEA Region (Visa is not required)	402	8,785	21.9
16. South Korea	Non-EU/EEA Region (Visa is not required)	807	7,997	9.9
17. Bolivia	Non-EU/EEA Region (Visa is required)	374	7,564	20.2
18. Taiwan	Non-EU/EEA Region (Visa is not required)	503	7,244	14.4
19. Austria	EU/EEA Region	6,591	7,185	1.1
20. Colombia	Non-EU/EEA Region (Visa is required)	435	7,109	16.3
21. Morocco	Non-EU/EEA Region (Visa is required)	251	5,499	21.9
22. Switzerland	EU/EEA Region	1,163	4,594	4
23. Costa Rica	Non-EU/EEA Region (Visa is not required)	215	4,331	20.1
24. Czechia	EU/EEA Region	753	4,026	5.3
25. Russia	Non-EU/EEA Region (Visa is required)	552	2,946	5.3
26. Malaysia	Non-EU/EEA Region (Visa is not required)	160	2,908	18.2
27. Ukraine	Non-EU/EEA Region (Visa is not required)	550	2,688	4.9
28. Paraguay	Non-EU/EEA Region (Visa is not required)	133	2,598	19.5
29. Uruguay	Non-EU/EEA Region (Visa is not required)	263	2,515	9.6
30. Honduras	Non-EU/EEA Region (Visa is required)	107	2,256	21.1
31. Portugal	EU/EEA Region	373	1,966	5.3
32. Thailand	Non-EU/EEA Region (Visa is required)	85	1,742	20.5
33. Poland	EU/EEA Region	1,029	1,727	1.7
34. Belgium	EU/EEA Region	361	1,423	3.9
35. Botswana	Non-EU/EEA Region (Visa is required)	52	1,177	22.6
36. Kuwait	Non-EU/EEA Region (Visa is required)	79	1,144	14.5
37. Guatemala	Non-EU/EEA Region (Visa is not required)	75	1,130	15.1
38.Kazakhstan	Non-EU/EEA Region (Visa is required)	47	993	21.1
39. Peru	Non-EU/EEA Region (Visa is required)	67	984	14.7
40. Algeria	Non-EU/EEA Region (Visa is required)	60	937	15.6
41. Bulgaria	EU/EEA Region	80	798	10
42. Ecuador	Non-EU/EEA Region (Visa is required)	49	656	13.4
43. Venezuela	Non-EU/EEA Region (Visa is required)	46	562	12.2
44. Denmark	EU/EEA Region	337	523	1.6
45. UAE	Non-EU/EEA Region (Visa is not required)	91	488	5.4
46. Hungary	EU/EEA Region	311	482	1.5
47. Oman	Non-EU/EEA Region (Visa is required)	36	428	11.9
48. Somalia	Non-EU/EEA Region (Visa is required)	25	393	15.7
49. Hong Kong	Non-EU/EEA Region (Visa is not required)	130	387	3
50. Afghanistan	Non-EU/EEA Region (Visa is not required)	23	349	15.2

NOTE: n=60 members

Market Overview: **Booking and Recruitment Channels**

Overall, group bookings were slightly more common than individual ones, with the difference largely driven by student age.

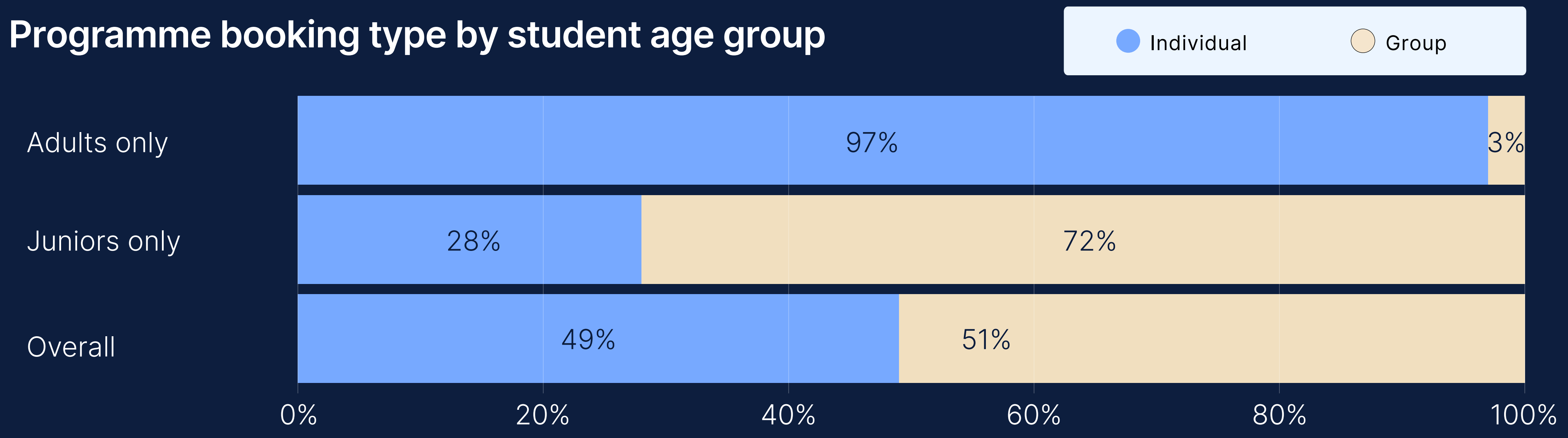
As junior students traditionally travel in groups, 72% of Junior programmes were booked as groups, while adult students predominantly book individually, and this mode accounted for 97% of their programme enrolments.

The primary source of programme bookings in 2024 was educational agents, who accounted for 69% of student enrolments.

This was followed by direct enrolments, which represent the second most common booking channel.

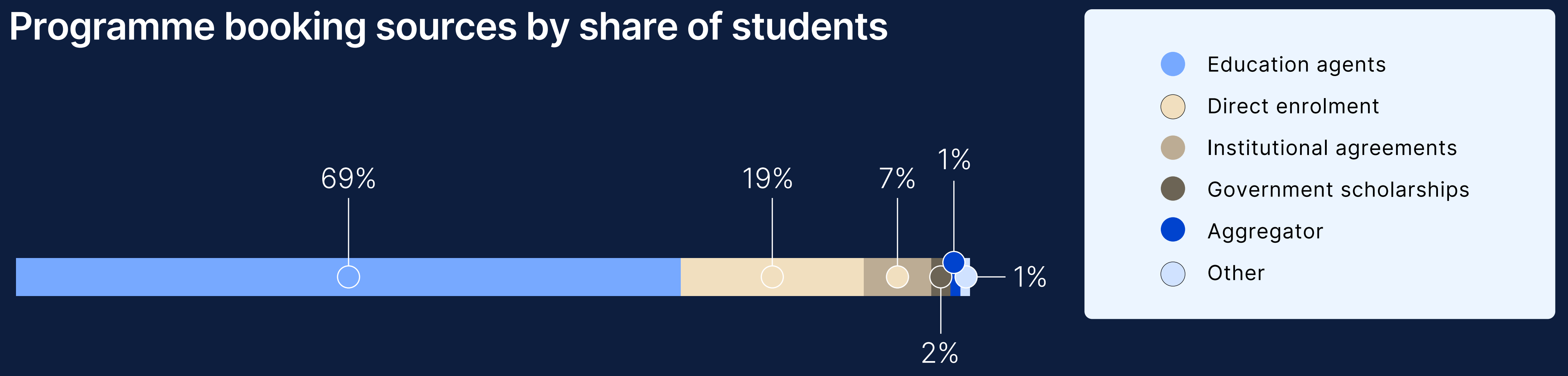
The main sources of programme information in 2024 were recommendations from educational agents and peers, followed by social media and educational events.

Programme booking type by student age group



NOTE: n=58 members

Programme booking sources by share of students



NOTE: n=58 members

The most common channels through which students find programme information

	Overall rank	Score
Education agency recommendation	1	425
Word of mouth	2	374
Social media	3	286
Education events	4	216
Printed and/or online advertising	5	179
Student fairs	6	167
Email campaigns	7	163
Adwords	8	118
Other	9	68

NOTE: n=58 members

Market Overview: **Provider Analysis**

In 2024, 60 EEI members participated in the annual reporting and provided data on their English language students. Of these, 47 were independently owned private schools, nine were chain or group-affiliated private schools, and four were state institutions.

The majority of schools operate year-round, with 88% of all respondents indicating continuous operations. Sixty-two percent of schools offer programmes for students of all age groups.

Fifty-three percent of schools reported welcoming students from non-EU/EEA countries that do not require a visa. In 2025, these institutions could be impacted by a change in the required financial proof for this category of students, which will be doubled to €6,665 in available funds. The change will affect students from key source LATAM markets (especially Brazil, Mexico, and Chile). Some Asian markets still recovering to pre-pandemic levels may also be impacted (e.g. Japan, South Korea, and Taiwan).

Sixty EEI members reported operating a total of 101 premises across various regions of Ireland. On average, private schools operate 1.7 premises each, with the largest reporting up to nine locations. Dublin has the highest concentration of EEI member schools, with over 60% of premises based in the capital.

EEI members by location in 2024

	Share of members (%)	Share of premise locations (%)
Dublin	65%	60%
Mid-East	12%	7%
South-East	10%	7%
Cork (South-West)	8%	5%
Galway	8%	5%
Limerick	7%	4%
Other South-West	7%	5%
Other regions	10%	7%
Sample size:	60	101

EEI member profile in 2024

	Share of members (%)
By ownership	
Private sector: Chain or group	15%
Private sector: Independently owned	78%
State	7%
By student age	
Juniors and adults	62%
Adults only	23%
Juniors only	15%
By operations	
Year-round	88%
Seasonal	12%
By number of ELE international students	
Large (1,500+ students)	45%
Medium (500 to 1,499 students)	32%
Small (fewer than 500 students)	20%
No ELE international students in 2024	3%
By international student visa group	
EU/EEA Region	92%
Non-EU/EEA Region (Visa not required)	53%
Non-EU/EEA Region (Visa required)	75%

NOTE: n=60 members

Economic Impact:
Tuition and Accommodation Fees

In 2024, EEI member schools reported approximately €159.8 million in revenue from direct educational activities, with around €61.35 million paid in salaries to teaching, administrative, and temporary staff.

On average, each English language student spent at least €5,576.3 per stay, including:

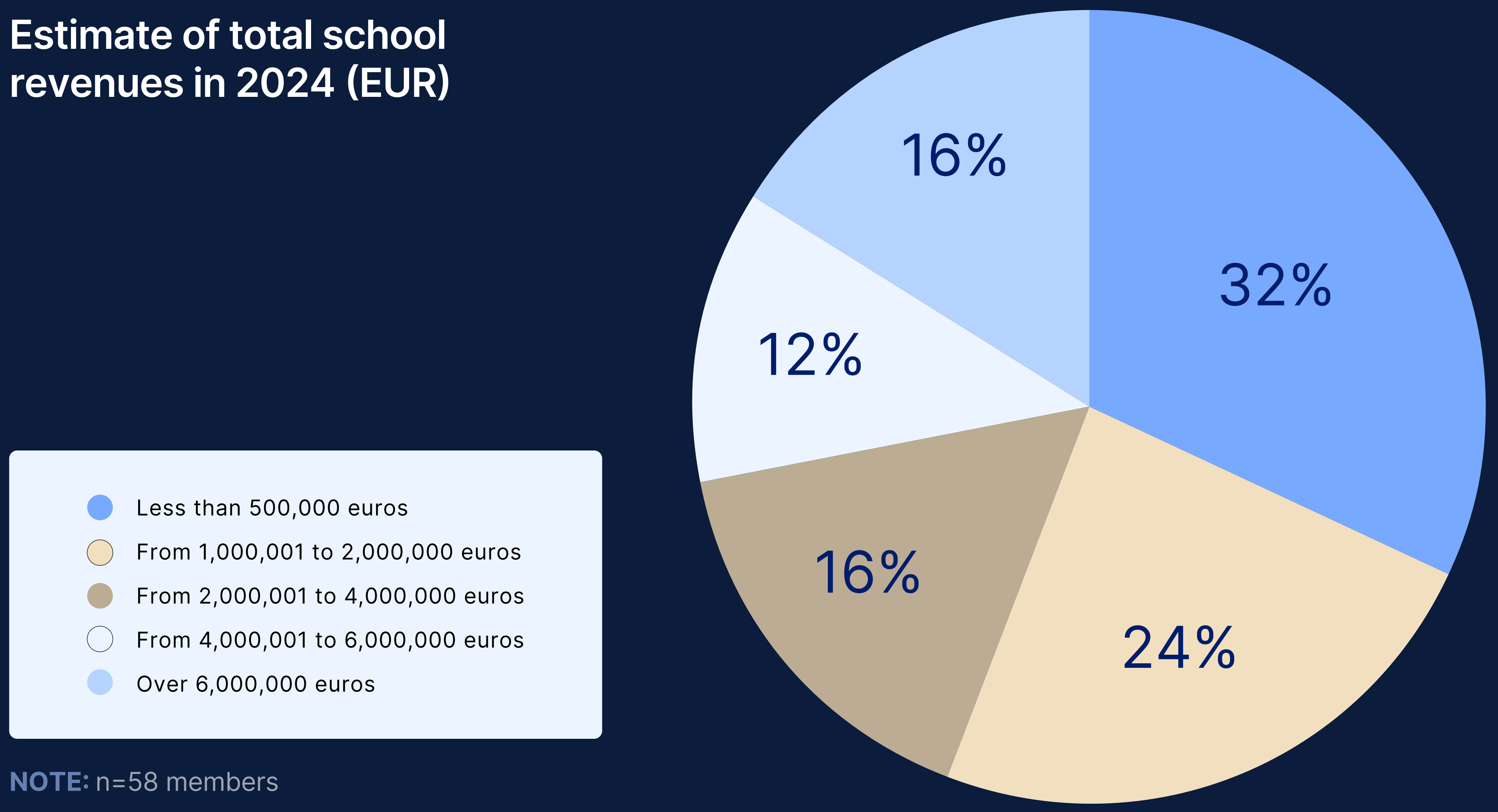
- Tuition fees – 22% of total expenses
- Accommodation – 39%
- Other direct expenses – 39%, covering transportation within Ireland, course materials, food, entertainment, health plans, gym access, and more.

These figures exclude additional costs, such as visa fees, international travel, car rental, and spending by accompanying travellers.

In total, the ELE sector contributed nearly €792 million directly to the Irish economy in 2024.

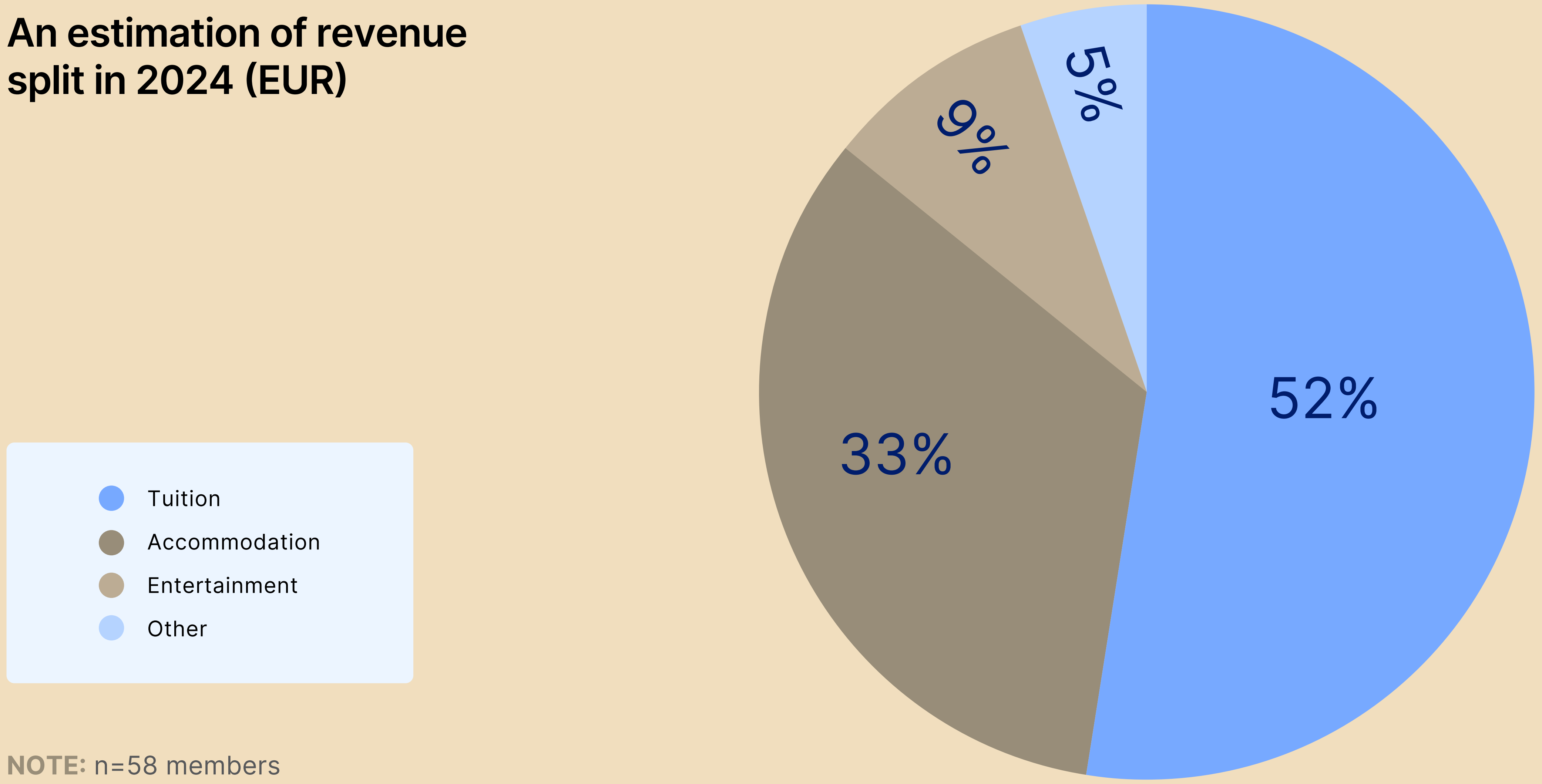
Tuition remains the primary revenue stream for schools, contributing 52% of total annual income, followed by accommodation, which accounts for 33%.

Estimate of total school revenues in 2024 (EUR)



NOTE: n=58 members

An estimation of revenue split in 2024 (EUR)



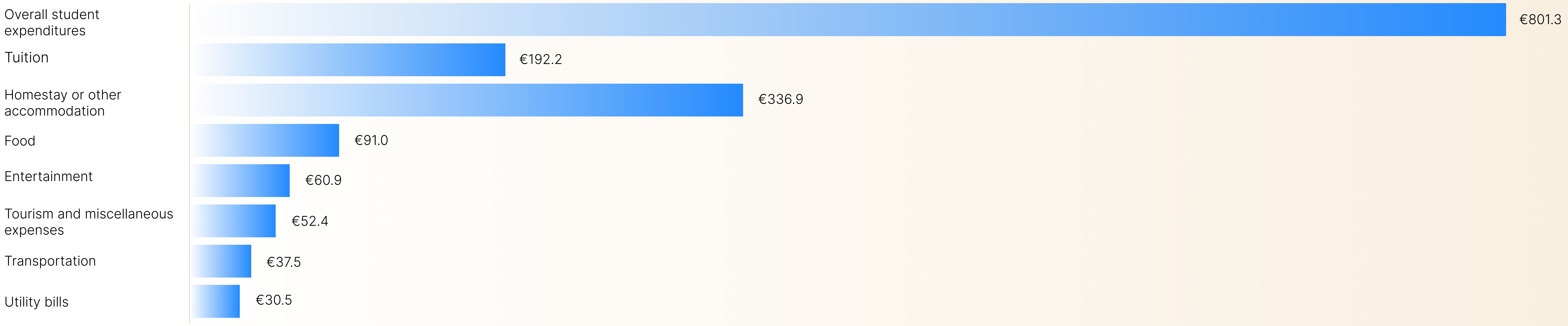
NOTE: n=58 members

Economic Impact:
Tuition and Accommodation Fees

In 2024, the average tuition fee for junior students was approximately €216 per week, while adult students paid around €154 per week. Accommodation costs averaged nearly €259.3 per week for homestay options and around €375.3 for alternative types of accommodation.

Additional student weekly expenses, including transportation, meals, course materials, entertainment, and other essentials, averaged €272.3.

Average weekly expenditures per English language student in 2024 (EUR)



NOTE: n=49 members

Human Resources

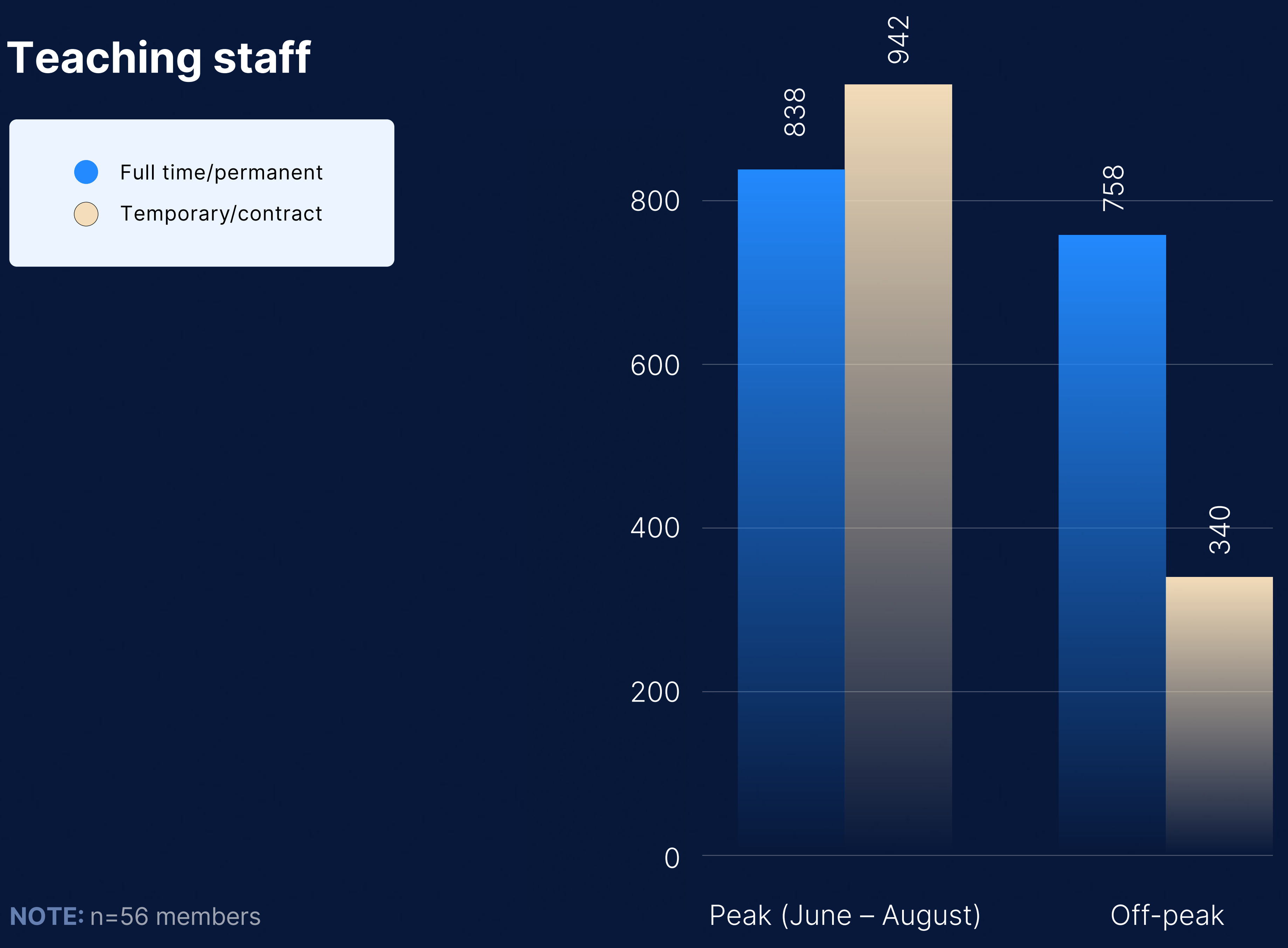
In 2024, EEI member schools reported employing 2,955 staff during the peak season (June–August) and 1,781 staff during the off-peak period.

Of the total workforce:

- 60% were teaching staff
- 56% were employed on a full-time basis

Average teaching staff employed in 2024

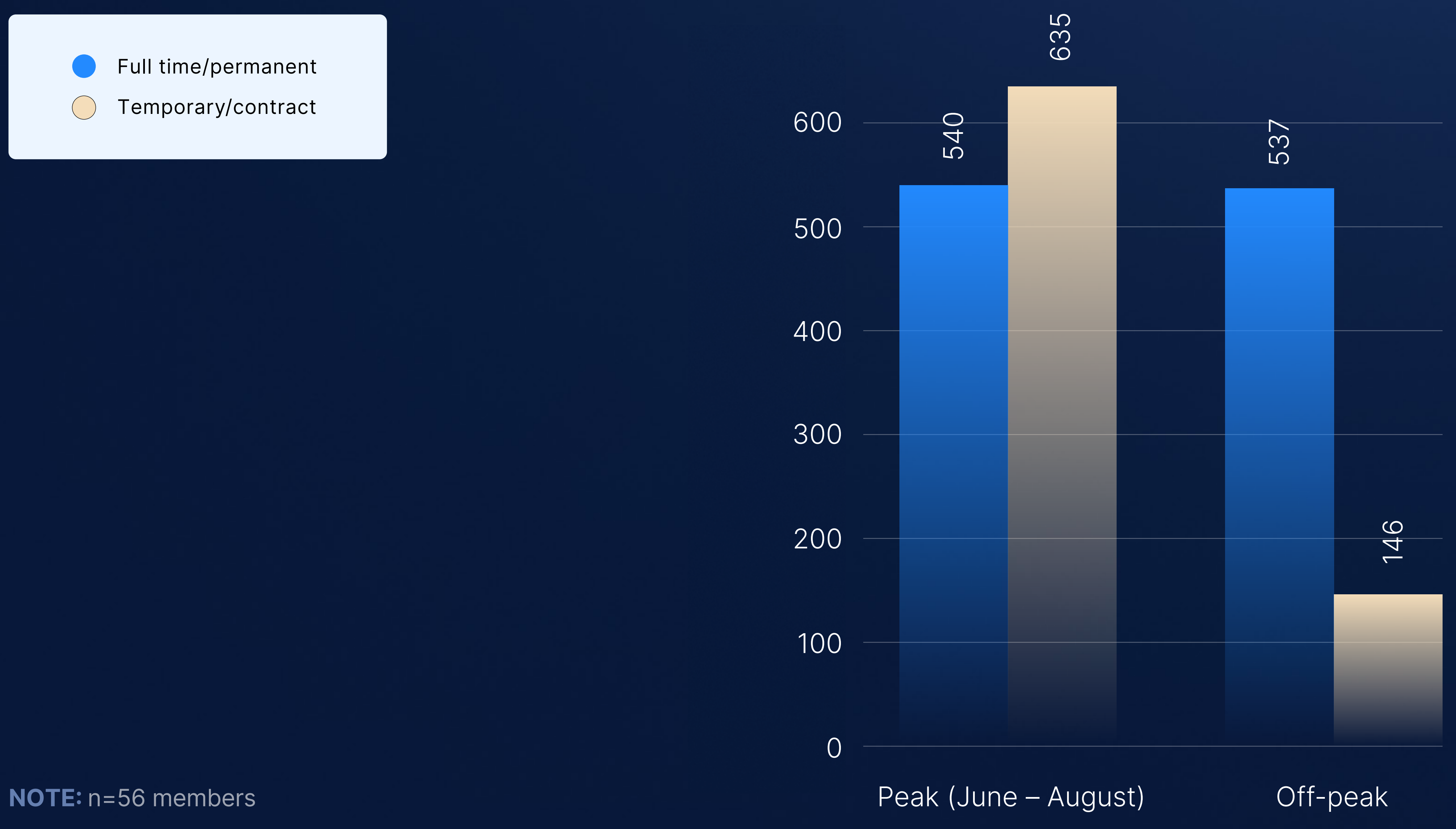
Teaching staff



NOTE: n=56 members

Average administrative staff employed in 2024

Administrative/support staff



NOTE: n=56 members

Accommodation

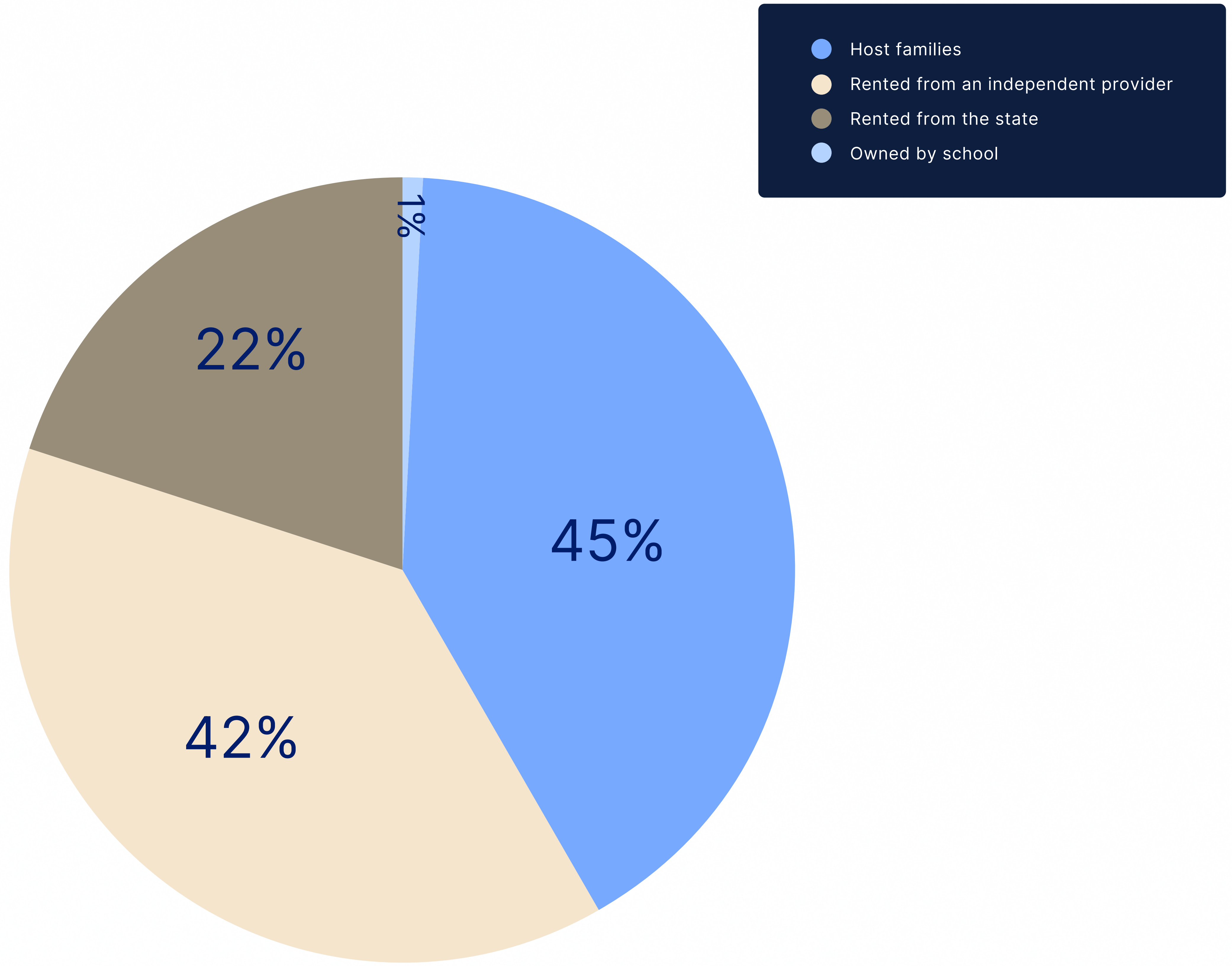
In 2024, schools reported offering 28,544 beds for English language students, with 45% provided through host families and 42% sourced from independent accommodation providers.

The total number of beds provided by schools for English language students in 2024

	Number of beds
Overall	**28,544**
Host family	12,922
Residences / dormitories	12,059
House share	1,541
University residences	1,500
Hostels	300
Apartment blocks	222
Host family	
Peak (June–August)	7,611
Off-peak	5,311

NOTE: Overall figures based on 49 reporting centres, host family breakdown n=51 members

Share of beds of the total number of beds provided by schools for English language students in 2024 by ownership type



NOTE: n=49 members

Challenges Faced **by Programmes**

In 2024, English language schools operated in an increasingly competitive and complex global environment.

Locally, the market has become saturated, with growing competition among providers offering similar programmes, making differentiation and value-for-money propositions more critical than ever.

Internationally, competition from emerging ELT destinations, such as the Philippines and Dubai, has intensified, especially as these locations offer more flexible visa regimes, lower costs, and shorter travel times for key source markets. Traditional destinations, including Ireland, now face greater pressure to remain attractive and accessible.

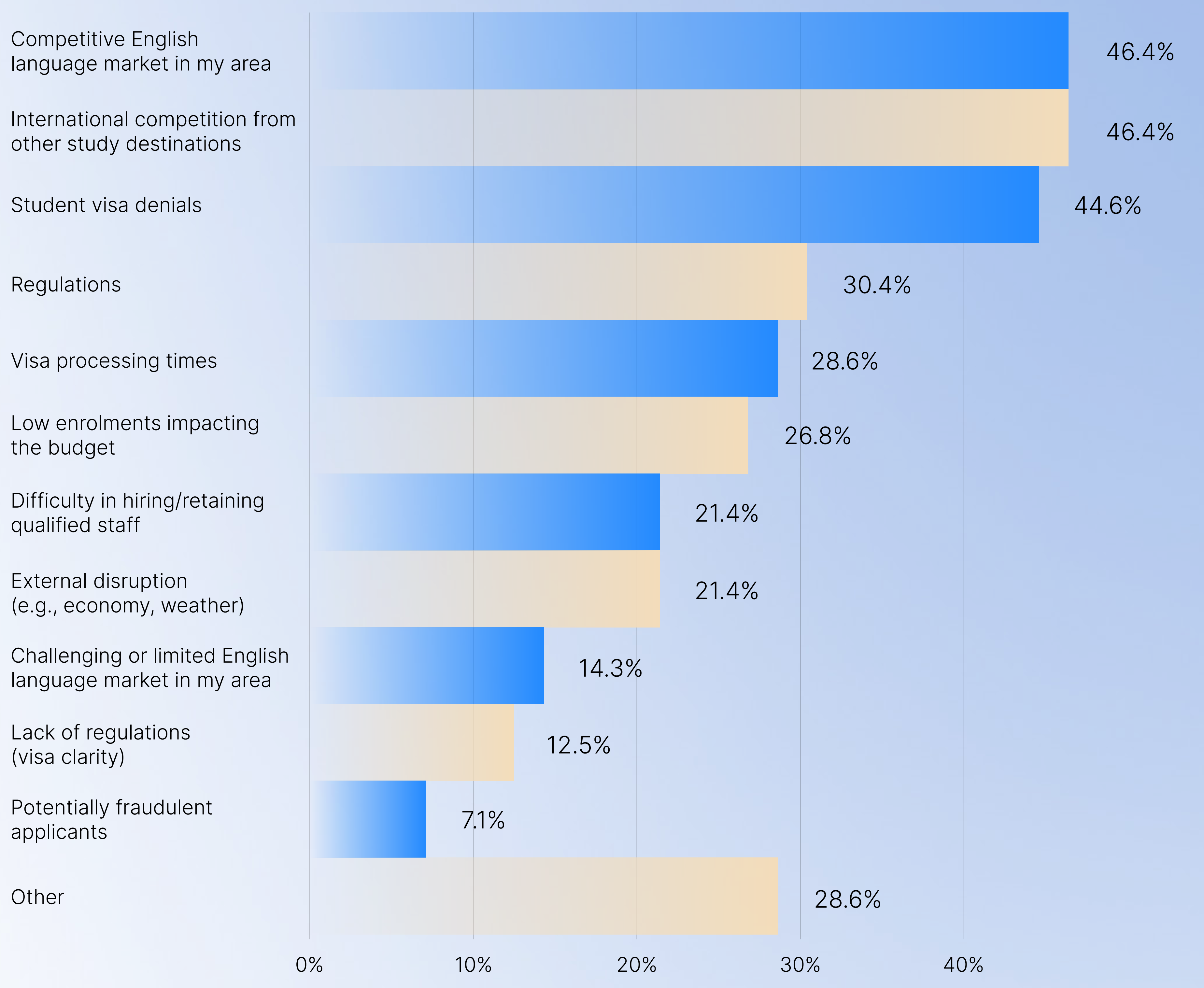
Student visa denials and lengthy processing times have further complicated recruitment efforts, particularly from key non-EU markets. These issues not only deter prospective students but also create uncertainty for schools planning their intakes and staffing.

Tightening government regulations and shifting immigration policies have added to operational burdens.

In terms of support needs, schools highlighted the importance of EEI's lobbying and marketing efforts, along with assistance in implementing the International Education Mark (IEM) framework, such as providing application templates.

Several schools also voiced concerns about the potential negative impact of Protection of Enrolled Learners (PEL) costs and evolving visa regulations in the coming year.

Top challenges schools faced in 2024



NOTE: n=56 members, multiple options possible

Appendix. 2024 Survey Participants

Apollo Language Centre
Asana School of English
ATC Language School
Atlantic Language Galway
Atlantic School of English and Active Leisure *
Atlas Language Schools
Avanti Language Institute
Babel Academy
Berlitz Language School
Bridge Mills Galway Language Centre
Castleforbes
Celtic school of English
Centre of English Studies
Citas
City Language School
Cork English Academy
Cork English College
DCU Language Services
Delfin English School
Donegal English Language School
Dublin Cultural Institute
Dublin International Foundation College
EC Dublin
EF International Language Centres
Einstein
ELCI
ELI
ELTA
Emerald Cultural Institute
Englishour
Equinox
Erin College
Everest Language School
Future Learning
High Schools International
Horner School of English
IBAT College *
International House Dublin
Irish College of English
ISI Dublin
Kaplan International Languages
Killarney School of English
Limerick Language Centre
Linguaviva Centre (The)
Mackdonald Language Academy
MLC
MLI International Schools
Moyle Park *
OHC Dublin
Pace Language Institute
Shandon Language Solutions
Slaney Language Centre (The)
Swan Training Institute *
The English Path
Travelling Languages
Twin English Dublin
UCC Language Centre
Ulearn
University of Galway Language Centre *
University of Limerick Language Centre

Non-respondents:
Central School of English
Rightword
UCD English Language Academy

* schools excluded from 2023 vs 2024 like-to-like annual comparison