Semi-Annual Report on English Language Training in Ireland

H1 2025

English Education Ireland

BONARD EDUCATION

Semi-Annual Report on English Language Training in Ireland • H1 2025

Prepared on behalf of:

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Foreword

Dear Members and Stakeholders,

I am pleased to share English Education Ireland's first-ever Semi-Annual Report, offering a timely snapshot of the sector's performance in the first half of 2025. This new reporting schedule is part of our commitment to providing members and partners with more frequent, actionable insights to inform strategy, operations, and policy engagement in an increasingly dynamic global education market.

The data from January to June reflects a mixed but resilient picture. We welcomed over 60,000 students from 113 countries, generating more than 274,000 student weeks. Ministays and junior group programmes continued their strong momentum, while adult enrolments – though still representing the majority of student weeks – faced pressure from visa policy changes and increased administrative hurdles.

What remains clear is that Ireland's strengths endure: our reputation for quality, safety, and a welcoming student experience continues to drive demand across key markets. Yet, the sector is also navigating significant headwinds – from visa denials and processing delays to tighter competition, regulatory complexity, and the rising cost of living.

As we look ahead to the second half of the year, the sector's adaptability and collaboration will be vital. EEI will continue to work closely with members, government, and international partners to advocate for practical policy solutions, expand market opportunities, and strengthen Ireland's position as a trusted, high-quality destination for English language education.

I would like to thank the 51 member schools who contributed data and insights for this report. Your engagement ensures that this research remains the most reliable and representative view of our sector, and an invaluable resource for strategic planning and advocacy.

Warm regards,
Lorcan O'Connor Lloyd
Chief Executive Officer

Introduction

H1 2025: Half-year snapshot and insights

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. 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.

Given the rapid shifts in international student mobility, where 2024 already differs significantly from emerging trends in 2025, the updated semi-annual reporting schedule aligns with EEI's strategy to better support members in today's fast-changing international education landscape by delivering more frequent, timely, and actionable insights.

The report captures the current market landscape, focusing on overall performance during January-June 2025 and outlook for the full year 2025, as well as student age groups, course types, and source market dynamics.

As part of our ongoing partnership, EEI commissioned BONARD to conduct the sector survey for the first half of 2025. 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.

Acknowledgments

We extend our sincere gratitude to all EEI member schools that contributed to this edition of the survey, staying engaged with us, providing valuable input, sharing challenges, and anticipating trends. Their support forms an essential foundation for sector advancement.

EEI and BONARD Teams

Methodology

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

Data collection was conducted online between July 3rd and August 15th, 2025.

As of July 2025, EEI had 62 member institutions, of which 51 participated in the survey, resulting in a response rate of 82% and covering more than 90% of the market. The full population of schools under review for the 1H 2025 reporting period is detailed in Appendix A. This 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 July 3rd and August 15th, 2025.

Participating schools submitted data on international students who commenced their studies during the January-June 2025. 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 (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 H1 2025 survey introduced several changes from previous report:

- The report introduces a semi-annual scheme, with year-on-year comparison not being available in 2025;
- New questions were added to capture international students' population for EEI members who do not provide ELT programmes;
- Outlook and performance expectations by the end of 2025.

H1 2025 Executive Summary

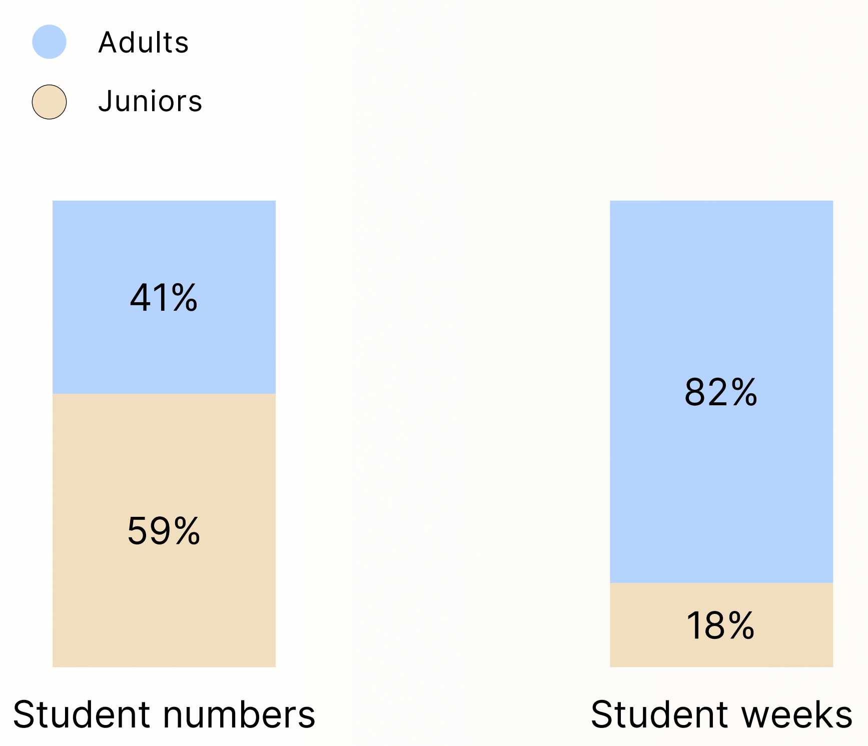
Participants H1 2025:
51
EEI members

International student numbers:
60,402
students in H1 2025

Total student weeks:
274,338
student weeks spent in H1 2025

Leading booking source:
Education agencies
74%

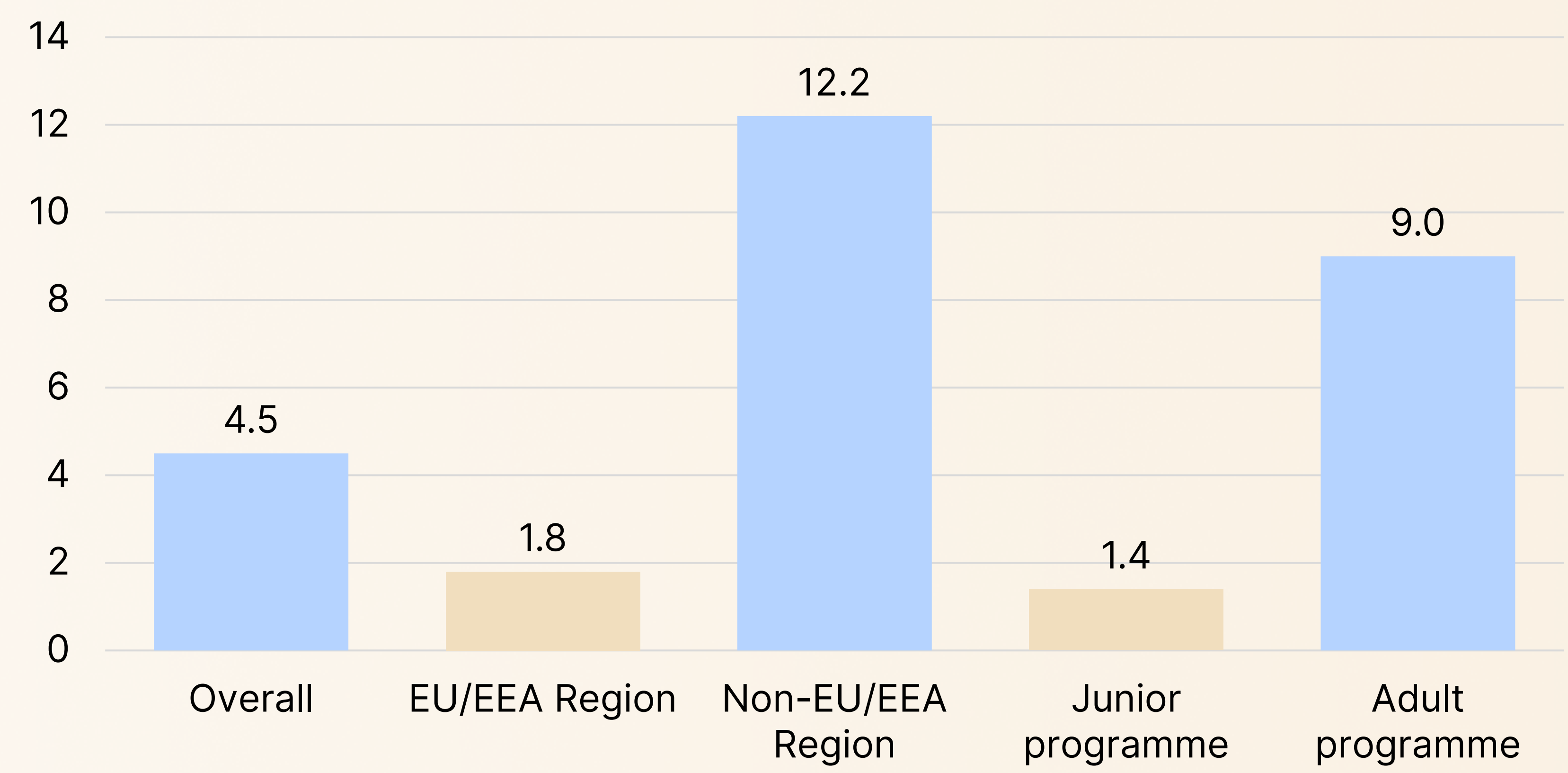
Adult-to-junior ratio:



Top source markets by student numbers

1. Italy
2. Spain
3. Brazil
4. Austria
5. France
6. Mexico
7. Germany
8. Chile
9. Japan
10. Switzerland

Average course duration (weeks)



Market Overview: **Ireland at a Glance**

In the first half of 2025, 51 participating member schools welcomed 60,402 international English language students from more than 113 countries. Together, these students spent a total of 274,338 weeks studying English in Ireland.

On average, students studied for 4.5 weeks. Non-EU/EEA students tended to stay significantly longer, averaging 12.2 weeks, while High School and Adult programme students studied for even longer periods, averaging 17.6 and 9.0 weeks respectively.

Compared with the same period in 2024, schools reported stronger performance in the Junior segment, primarily driven by Ministays overtaking enrollments from Junior programmes. In contrast, Adult programmes experienced a moderate decline, mainly due to stricter visa requirements and the introduction of new visa policies.

Among the markets contributing to growth were Italy, China, and Japan, while Brazil, Spain, and Turkey reported notable declines.

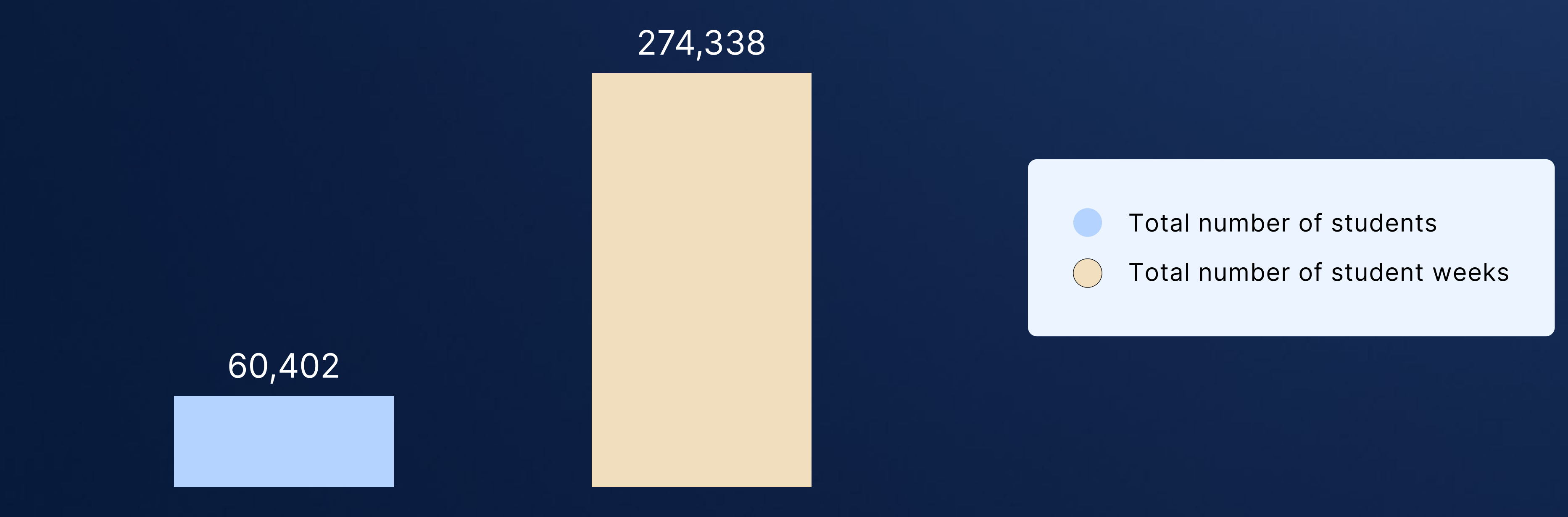
Looking ahead to the full year, participating schools anticipate overall stability compared to 2024. Specifically, 38% of schools (representing 42% of student enrollments) expect stable performance, 35% (27% of enrollments) anticipate a moderate decline, while 16% (24% of enrollments) foresee moderate growth.

Total international student enrollment expectations by the end of 2025 compared to 2024

	% of schools	% share of reported students in H1 2025
Significant growth (more than +20%)	0%	0%
Moderate growth (+6% to +20%)	16%	24%
Rather stable (-5% to +5%)	38%	42%
Moderate decline (-6% to -20%)	35%	27%
Significant decline (more than -20%)	9%	6%
Not sure at this moment	2%	1%

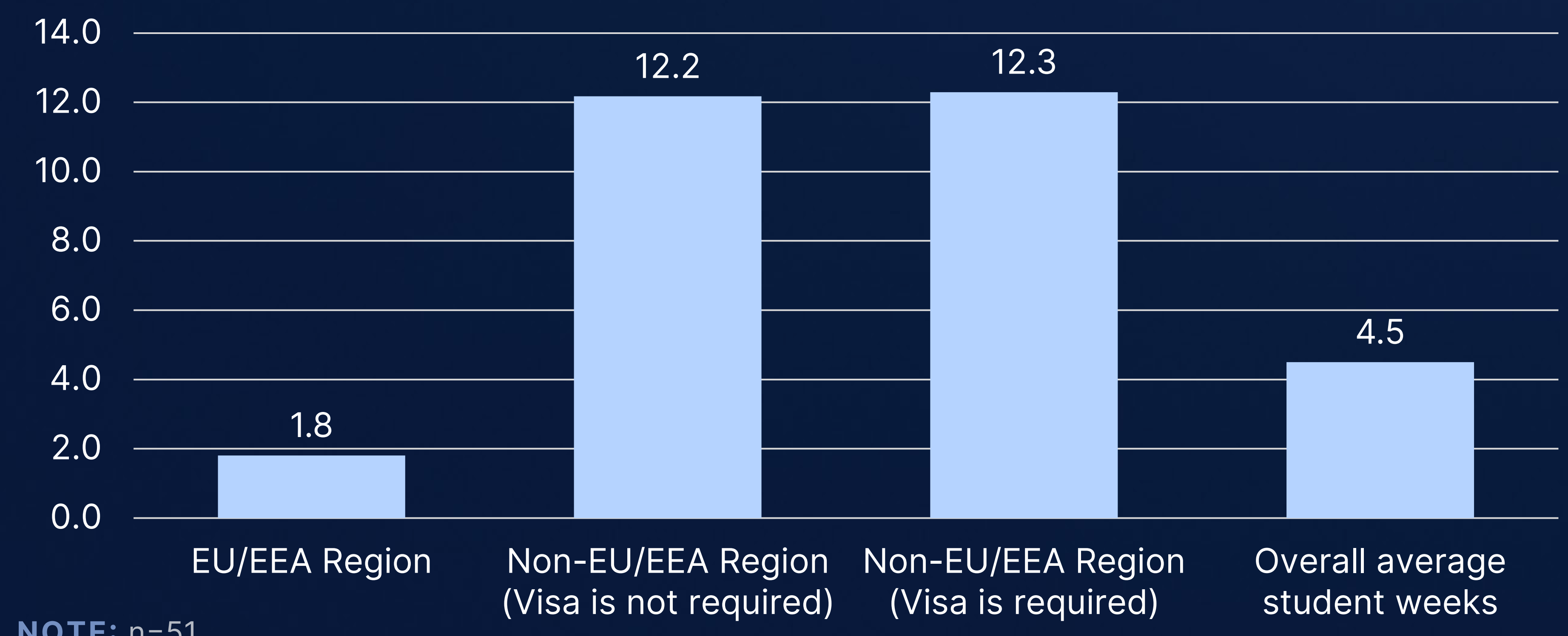
NOTE: n=43

Overall number of English language students and student weeks taught by EEI member schools H1 2025



NOTE: n=51

Average course duration (weeks)



NOTE: n=51

Market Overview: **Ireland at a Glance**

The ELT sector in Ireland is traditionally driven by junior students (under-18s), who accounted for 59% of all student enrollments reported in the first half of 2025. Ministays remain the most popular junior programme, representing nearly half of junior enrollments. However, juniors contributed only 18% of total student weeks during the period.

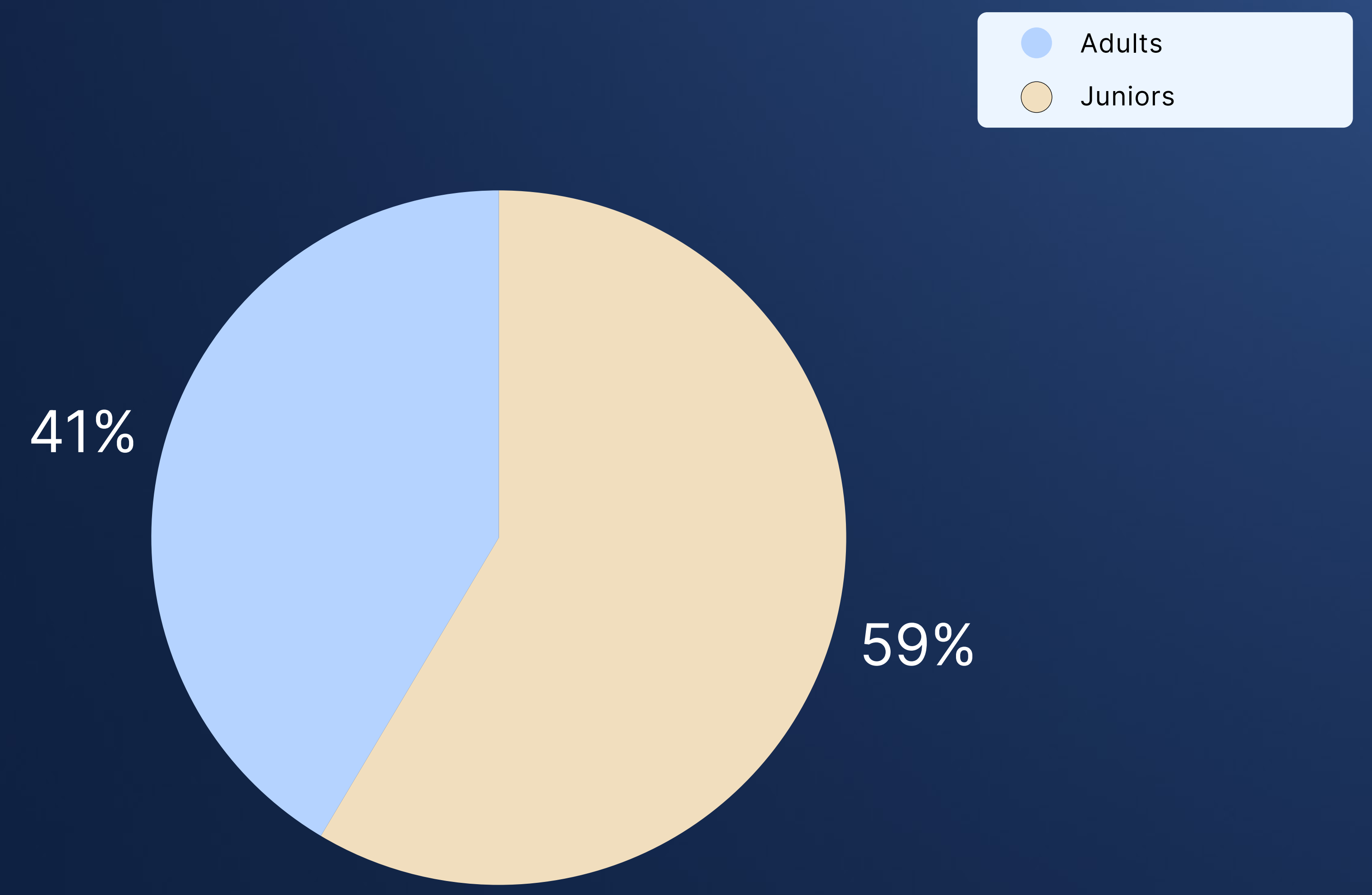
Adult programmes represented 41% of enrollments, but given their longer duration of study, they accounted for 82% of all student weeks in Ireland in H1 2025.

Programmes offered to ELT students by EEI members in H1 2025

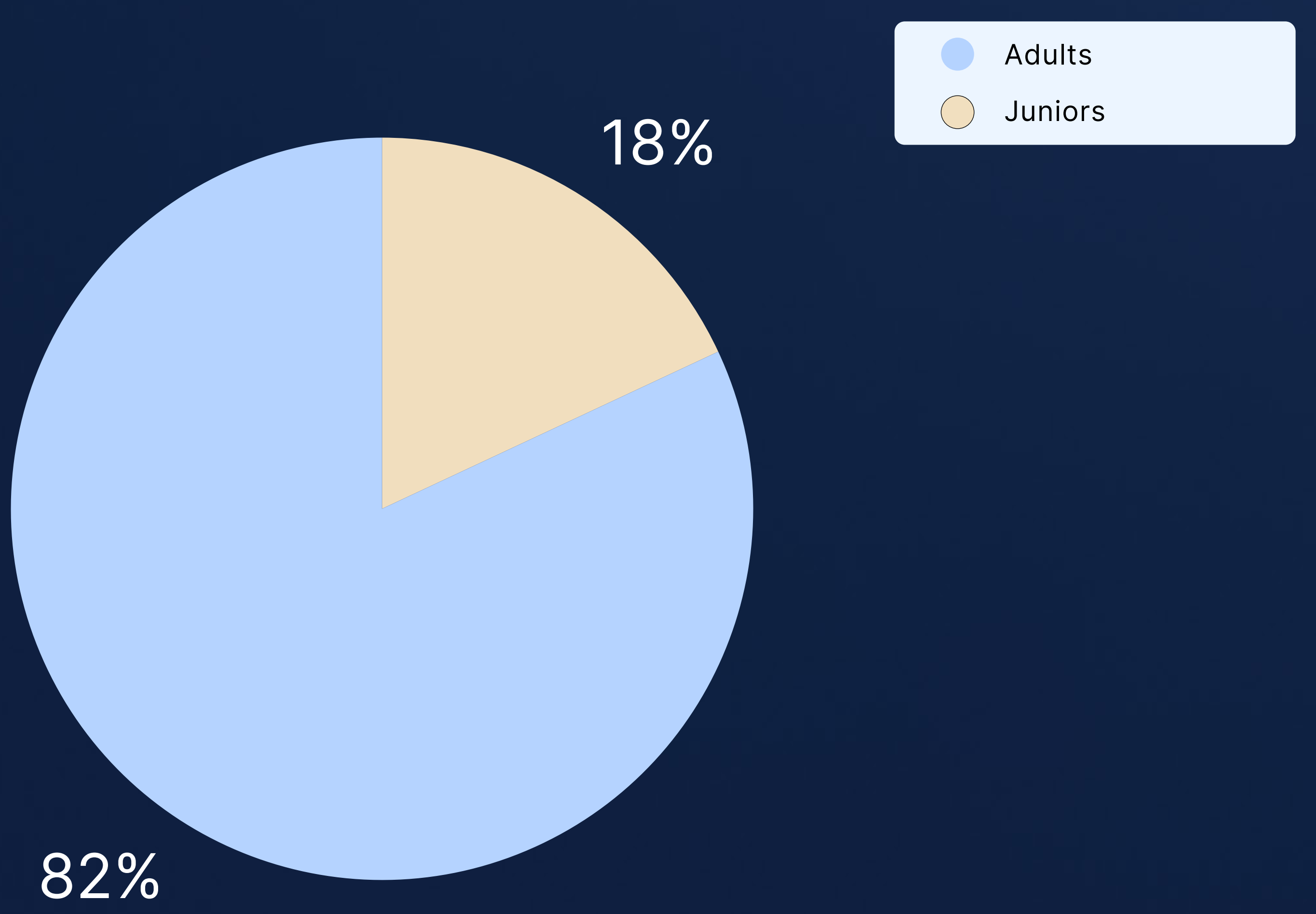
	Share of students (%)	Share of student weeks (%)
Junior Programmes	**59%**	**18%**
Ministays	49%	13%
Junior Programmes	9%	3%
High School Programmes	1%	2%
Adult Programmes	**41%**	**82%**

Programmes offered to ELT students by EEI members in H1 2025

Student numbers



Student weeks



n=51 members

Market Overview:
Ireland at a Glance

Western Europe remained the largest source region, accounting for 72% of all students studying with EEI members in the first half of 2025, with an average stay of 1.8 weeks.

Latin America (LATAM) followed, contributing 18% of students, who tended to stay longer, for an average of 13.2 weeks, making the region the largest contributor in terms of total student weeks. Within LATAM the highest course duration was recorded among students from Chine (15.8 weeks), followed by Mexico (13.9) and Brazil (12.2).

Although students from Asia, the Middle East and Africa represented a smaller share of student numbers, their average length of stay was comparatively high, at 10.8, 9.8 and 13.3 weeks respectively.

In terms of school-level engagement, over 75% of institutions enrolled students from Western Europe, Asia and LATAM.

Source regions of English language students in H1 2025

	Share student numbers (%)	Student numbers	Student weeks	Average course duration (weeks)	Share of schools' reported nationalities (%)
Western Europe	72%	43,641	78,526	1.8	82%
Eastern Europe	2%	1,256	3,715	3.0	67%
LATAM	18%	10,857	143,137	13.2	73%
Asia	6%	3,458	37,232	10.8	76%
The Middle East	1%	823	8,073	9.8	59%
Africa	<1%	226	3,012	13.3	45%
Other	<1%	141	642	4.5	12%

n=51 members

Market Overview: **Adult vs Junior Segment**

Across Junior Programmes, 35,370 students enrolled in the first half of 2025, spent a total of 49,499 student weeks. These students studied on average of 1.4 weeks. While Junior Programmes attract the highest volume of students (59%), they account for a relatively modest share of total student weeks (18%).

Ministays remained the most popular Junior Programme, welcoming 29,451 students over the reported period. With courses averaging just over 1.2 weeks, Ministays attract large numbers of participants but for the shortest duration. Notably, 33% of participating schools reported growth in Ministay intake between January–June 2025 compared to the same period of 2024, while recruitment for Junior and High School Programmes was considered somewhat more challenging by around one-third of schools offering these options.

In contrast, the adult market enrolled 25,032 students but contributed by far the largest share of study weeks (82%). Adults generated 224,839 student weeks in H1 2025. These students studied on average of 9 weeks. However, 40% of schools reported a decline in adult student intake compared to the first half of 2024, mainly due to stricter visa regulations.

ELT students and student weeks by programmes in EEI member schools (H1 2025)

	Student numbers	Student weeks	Average course duration (weeks)
Junior Programmes	35,370	49,499	1.4
Ministays	29,451	34,385	1.2
Junior Programmes	5,513	7,971	1.4
High School Programmes	406	7,142	17.6
Adult Programmes	25,032	224,839	9.0
Total	**60,402**	**274,338**	**4.5**

n=51 members

Market Overview:
Adult vs Junior Segment

European markets continue to be the primary source of Junior students, with the top five markets all from the region, together accounting for 94% of total enrollments:

- Italy and Spain confirmed their positions as the top source markets for Junior Prgrammes enrolling 19,093 and 9,246 students respectively.
- In the first half of 2025, Austria placed third with 3,568 students, followed by France with 991 students and Germany with 518 students.

Brazil remained the leading source market for Adult Programmes in H1 2025, accounting for both the highest number of students and student weeks. Italy, France, and Spain followed sending 2,679, 2,453, and 2,317 students, respectively.

Although reporting fewer student enrollments between January and June 2025, Mexico, Chile, and China stood out with the longest average stay durations among Adult students.

Top 10 source markets by ELT student numbers in H1 2025 for Junior programmes combined

	Student numbers	Student weeks	Average course duration (weeks)
Italy	19,093	24,992	1.3
Spain	9,246	12,043	1.3
Austria	3,468	3,740	1.1
France	991	1,678	1.7
Germany	518	1,503	2.9
Mexico	365	1,122	3.1
Switzerland	215	274	1.3
The Netherlands	175	183	1.0
Poland	157	214	1.4
Japan	155	424	2.7

n=34 members

Top 10 source markets by ELT student numbers in H1 2025 for Adult programmes

	Student numbers	Student weeks	Average course duration (weeks)
Brazil	5,654	69,843	12.4
Italy	2,679	9,248	3.5
France	2,453	8,741	3.6
Spain	2,317	9,239	4.0
Mexico	1,907	30,539	16.0
Germany	1,118	2,694	2.4
Chile	1,033	16,523	16.0
Japan	866	6,814	7.9
Switzerland	623	2,418	3.9
China	554	6,762	12.2

n=44 members

Market Overview:
Adult vs Junior Segment

General English represented the most popular course among adult learners attracting 88% of all students over the measured period. Adult spent on average 9.4 weeks enrolled in a General English programme.

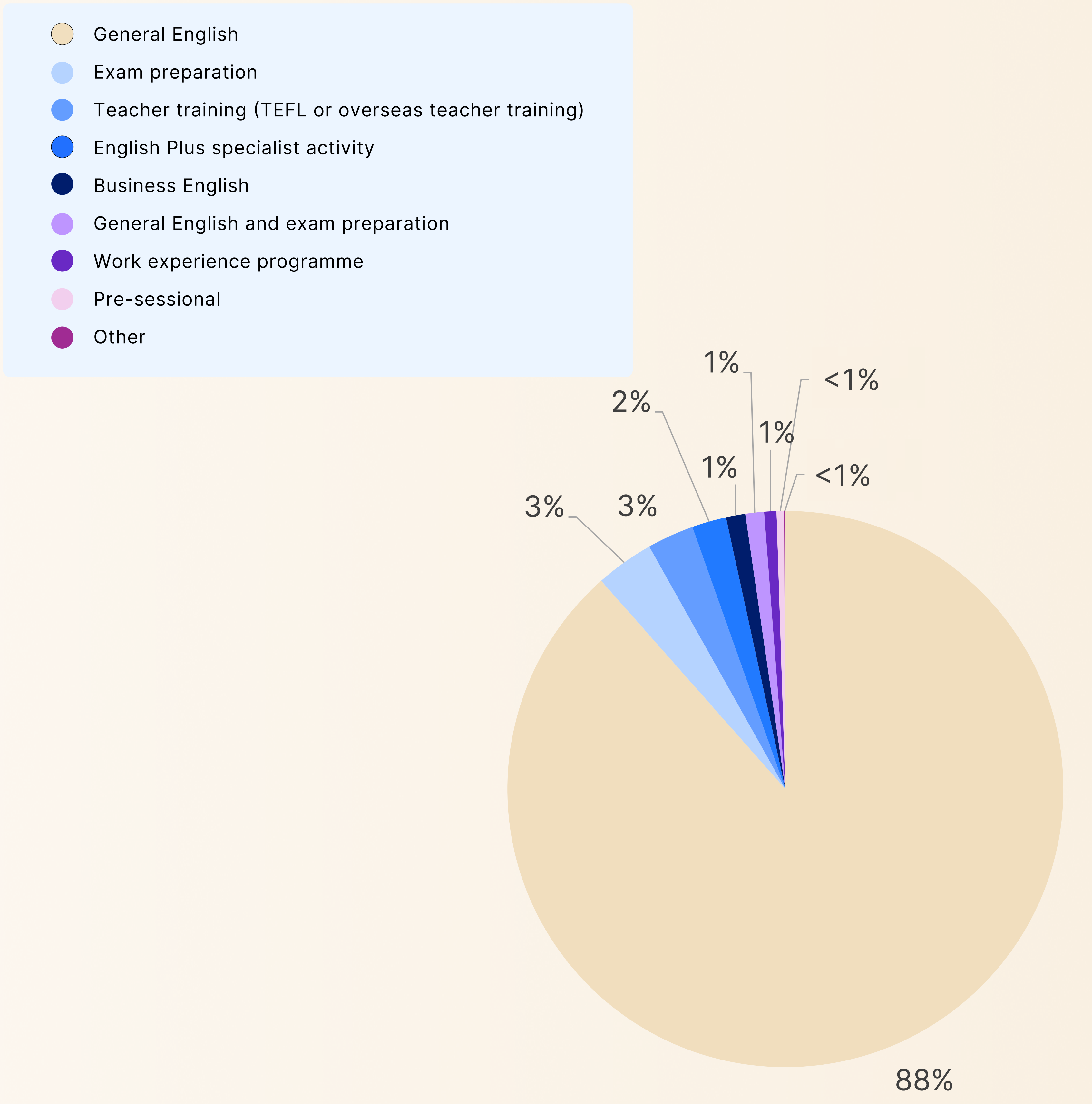
Exam Preparation and Teacher Training were the second most popular programmes, each accounting for a 3% of student enrollments, followed by English plus specialist activity and Business English.

Adult programmes by share of student weeks and average course duration

	Student weeks share (%)	Average course duration (weeks)
General English	93%	9.4
Exam preparation	3%	9.2
General English and Exam Preparation	2%	14.4
Teacher training	<1%	1.5
Business English	<1%	3.2
English plus specialist activity	<1%	1.7
Work experience programme	<1%	3.1
Pre-sessional	<1%	0.1
Other	<1%	1.1

n=44 members

Adult programmes by share of student numbers



Market Overview: **Source Markets**

In the first half of 2025, the top ten source markets accounted for 88% of all students and 74% of all student weeks reported by participating schools. Italy emerged as the top source market sending 21,772 students who cummulatevily spent 34,240 student weeks.

Spain ranked second with 11,562 students studying for a total of 21,282 weeks.

While the Brazil ranked third in terms of student numbers, these student were studying on average of 12.2 weeks, which make Brazil the largest source market in terms of student weeks spent - 70,014 weeks in total.

Between January and June 2025, Japan was the only Asian market to appear in the top 10, ranking 9th with 1,021 students.

Of the top ten source markets, Austria recorded the shortest course duration of 1.1 student weeks. On the other hand, students from Chile experienced the largest course duration of 15.8 weeks.

Top source markets by student numbers in H1 2025

Market Overview:
Source Markets

Top 50 source markets in H1 2025 by student numbers

Source country	Group	Student numbers	Student weeks	Average course duration (weeks)
1 Italy	EU/EEA Region	21,772	34,240	1.6
2 Spain	EU/EEA Region	11,562	21,282	1.8
3 Brazil	Non-EU/EEA Region (Visa is not required)	5,728	70,014	12.2
4 Austria	EU/EEA Region	3,635	3,936	1.1
5 France	EU/EEA Region	3,444	10,419	3.0
6 Mexico	Non-EU/EEA Region (Visa is not required)	2,272	31,661	13.9
7 Germany	EU/EEA Region	1,636	4,198	2.6
8 Chile	Non-EU/EEA Region (Visa is not required)	1,050	16,556	15.8
9 Japan	Non-EU/EEA Region (Visa is not required)	1,021	7,238	7.1
10 Switzerland	EU/EEA Region	838	2,691	3.2
11 Argentina	Non-EU/EEA Region (Visa is not required)	605	6,753	11.2
12 China	Non-EU/EEA Region (Visa is required)	592	7,516	12.7
13 Mongolia	Non-EU/EEA Region (Visa is required)	587	10,697	18.2
14 South Korea	Non-EU/EEA Region (Visa is not required)	443	3,234	7.3
15 Turkiye	Non-EU/EEA Region (Visa is required)	375	3,522	9.4
16 Taiwan	Non-EU/EEA Region (Visa is not required)	316	3,443	10.9
17 Poland	EU/EEA Region	309	536	1.7
18 Panama	Non-EU/EEA Region (Visa is not required)	253	3,746	14.8
19 The Netherlands	Non-EU/EEA Region (Visa is not required)	250	357	1.4
20 Czechia	EU/EEA Region	227	417	1.8
21 Malaysia	Non-EU/EEA Region (Visa is not required)	226	2,919	12.9
22 Belgium	EU/EEA Region	195	553	2.8
23 El Salvador	Non-EU/EEA Region (Visa is not required)	192	4,229	22.0
24 Uruguay	Non-EU/EEA Region (Visa is not required)	186	1,407	7.6
25 Saudi Arabia	Non-EU/EEA Region (Visa is required)	174	1,047	6.0
26 Ukraine	Non-EU/EEA Region (Visa is not required)	155	989	6.4
27 Other	Other	137	628	4.6
28 Costa Rica	Non-EU/EEA Region (Visa is not required)	136	2,504	18.4
29 Russia	Non-EU/EEA Region (Visa is required)	134	652	4.9
30 Hungary	EU/EEA Region	133	199	1.5
31 Lebanon	Other	120	2,730	22.7
32 Colombia	Non-EU/EEA Region (Visa is required)	105	1,269	12.1
33 Guatemala	Non-EU/EEA Region (Visa is not required)	96	1,756	18.2
34 Thailand	Non-EU/EEA Region (Visa is required)	77	1,101	14.3
35 Paraguay	Non-EU/EEA Region (Visa is not required)	74	1,346	18.2
36 Estonia	EU/EEA Region	70	75	1.1
37 Hong Kong	Non-EU/EEA Region (Visa is not required)	70	344	4.9
38 Portugal	EU/EEA Region	66	330	5.0
39 Kuwait	Non-EU/EEA Region (Visa is required)	65	270	4.1
40 Slovakia	EU/EEA Region	65	91	1.4
41 Sweden	EU/EEA Region	60	210	3.5
42 Morocco	Non-EU/EEA Region (Visa is required)	59	1,242	21.1
43 Syria	Non-EU/EEA Region (Visa is required)	56	160	2.8
44 Finland	EU/EEA Region	55	70	1.3
45 Senegal	Non-EU/EEA Region (Visa is required)	54	435	8.0
46 Denmark	EU/EEA Region	52	91	1.7
47 Venezuela	Non-EU/EEA Region (Visa is required)	40	174	4.4
48 Bolivia	Non-EU/EEA Region (Visa is required)	38	596	15.9
49 Romania	EU/EEA Region	34	135	4.0
50 San Marino	Non-EU/EEA Region (Visa is not required)	32	18	0.6

n=51 members

Market Overview: **Booking and Recruitment Channels**

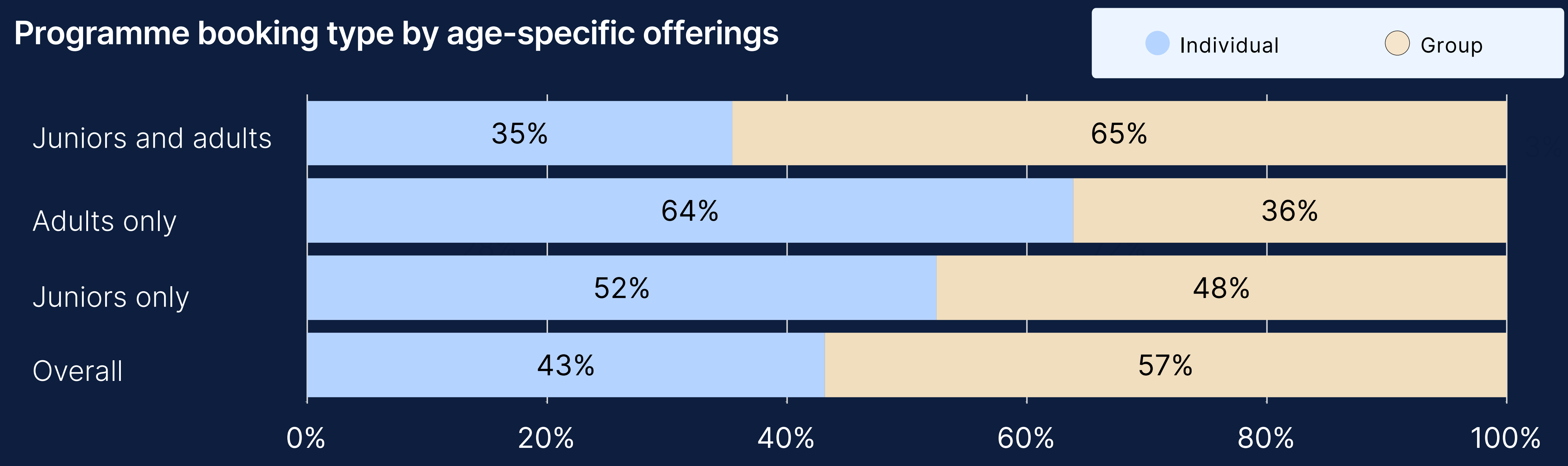
Group bookings were more popular than individual bookings in the first half of 2025, accounting for 57% and 43% respectively.

Adults continued booking individually in H1 2025 with 64% choosing this option, while 36% of adults studied English in Ireland as part of the group. In contrast, the Junior segment showed a more balanced preference during the same period.

Education agents were the most used booking channel in H1 2025 with 74% of students were enrolled through education agencies. While 19% of students booked directly, only 3% enrolled through institutional agreements.

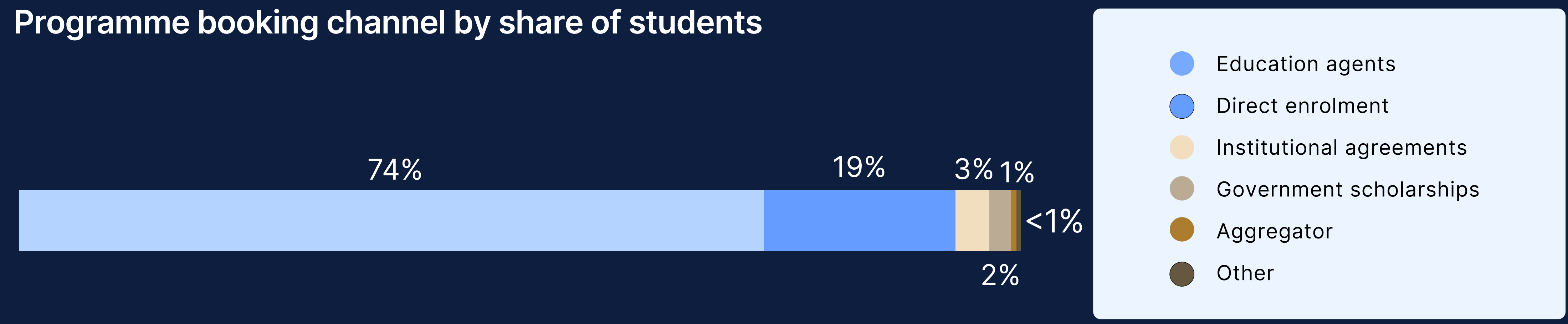
Education agency recommendation was the most used channel, though which students find programme information. Word-of-mouth remained still dominant which social media folled closely in third spot.

Programme booking type by age-specific offerings



n=50 members

Programme booking channel by share of students



n=50 members

The most common channels through which students find programme information

	Overall rank	Score
Education agency recommendation	1	333
Word-of-mouth	2	283
Social media	3	242
Education events	4	175
Student fairs	5	138
Printed and/or online advertising	6	118
Email campaigns	7	102
Adwords	8	86
Other	9	55

n=44 members

Market Overview: **Provider Analysis**

In H1 2025, 51 EEI members participated in semi-annual reporting scheme and provided data on their English language students. Of these, 80% were independently owned private schools, 12% were chain or group-affiliated private schools and 8% were state institutions.

Majority of schools operate year-round (94%) while 6% run seasonally. Fifty-five percent of schools enroll both juniors and adults.

Eighty-two percent of schools enroll students from the EU/EEA region, while a slightly lower share of schools enroll non-EU/EEA students who do not require a visa (78%) and non-EU/EEA students who do require a visa (75%).

Fifty-one EEI schools operate 85 premises in Ireland. On average, schools operate 1.7 premises with the largest reporting up to 5 premises. Dublin continues to hold the highest concentration of EEI member schools, with 62% of premises based in the capital.

EEI members by location in H1 2025

	Share of members (%)	Share of premise locations (%)
Dublin	61%	62%
Cork (South-West)	14%	8%
Mid-East	10%	6%
Galway	8%	5%
Limerick	8%	5%
South-East	6%	4%
Other South-West	6%	5%
Other regions	10%	6%
Sample size:	51	85

EEI member profile in H1 2025

	Share of members (%)
By ownership	
Private sector: Chain or group	12%
Private sector: Independently owned	80%
State	8%
By student age	
Juniors and adults	55%
Adults only	31%
Juniors only	14%
By operations	
Year-round	94%
Seasonal	6%
By number of ELP international students	
Large (1,500+ students)	22%
Medium (500 to 1,499 students)	33%
Small (fewer than 500 students)	39%
No ELP international students in 2024	6%
By international student visa group	
EU/EEA Region	82%
Non-EU/EEA Region (Visa not required)	78%
Non-EU/EEA Region (Visa required)	75%

n=51 members

Market Overview: **Provider Analysis**

A small proportion of EEI members who took part in the H1 2025 survey do not enroll students in ELP, but instead offer other types of programmes for international students, thereby contributing to the sector overall.

In H1 2025, these schools reported hosting 488 students across various programmes, with Juniors accounting for 95% of total enrollments. They anticipate a stable student intake by the end of 2025 compared to the previous year.

Overall, students came from around 20 different countries, with Brazil, Spain, and Italy being the most represented nationalities.

Programmes	% share of students in H1 2025
High School Full-Year(s) Programmes (typically, 12-18 year olds)	40%
High School Term(s) Programmes (typically, 12-18 year olds)	24%
Short-Stays Programmes (typically, 12-18 year olds staying during term time)	19%
Exchange Programmes (typically, 12-18 year olds staying during term time)	7%
Summer Programmes (typically, 12-18 year olds staying during term time)	5%
Adult Programmes (typically, at least 18 years old on a range of programmes throughout the year, e.g. Work Experience)	5%

Top 5 markets by student enrollments in H1 2025

Source market	Share of students
Brazil	31%
Spain	27%
Italy	16%
France	9%
Germany	7%

n= less than 5

Challenges Faced
by Programmes

The report highlighted several key challenges English language schools faced in H1 2025. The most frequently reported challenge was student visa denials, cited by 51% of members. This highlights the ongoing administrative and policy hurdles that continue to have a direct impact on enrolments.

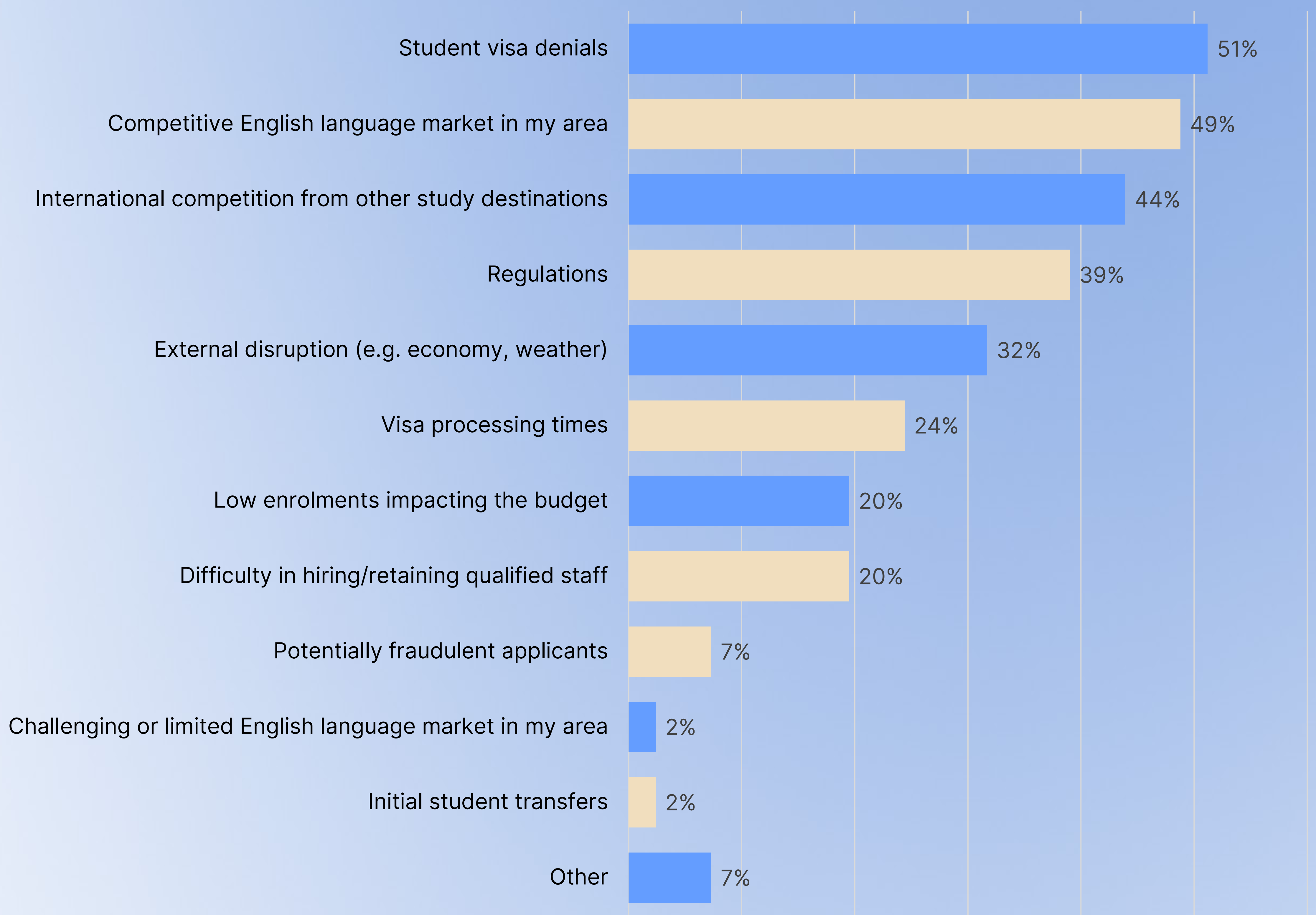
Close behind, 49% of EEI members cited local market competition as a significant challenge.

International competition from other study destinations was noted by 44% of members, showing that schools must continually differentiate their programmes to attract students globally.

Regulatory requirements were also a challenge for 39% of members. Additionally, every third school pointed to external disruptions, such as economic fluctuations or adverse weather, as factors that can unpredictably affect student demand and operations.

When it comes to support the members would welcomed the most from the EEI, schools primarily highlighted the need for visa and immigration assistance. This includes help with visa applications, guidance in local languages for source markets, and greater transparency around visa denials. Secondly, schools value continued efforts in lobbying and policy advocacy. Additionally, schools expressed a desire for more opportunities to network with other schools and education agencies through events, fam trips, and training workshops.

Top challenges schools faced in H1 2025



n=41 members, multiple options possible

Appendix
H1 2025 Survey Participants

Apollo Language Centre
Asana International School
ATC Language Schools
Atlantic Centre of Education
Atlantic School of English and Active Leisure LTD
Atlas Language School
Avanti Language Institute
Babel Academy of English
Bridge Mills Galway Language Centre
Castleforbes College
Celtic School of English
Centre of English Language Studies
Citas College Dublin
City Language School
Cork English Academy
Cork English College
DCU International Academy
Delfin English School
DIFC
Donegal English Language School
Dublin College of Advanced Studies
EC Dublin
Education First Dublin
Einstein 2 English
ELI Schools
Emerald Cultural Institute
English Language Centre, University of Galway
Equinox Education Services
Erin College
Everest Language School
Future Learning
Horner School of English
HSI
IBAT College
International House Dublin
Irish College of English
ISI Dublin
Kaplan International Languages
Killarney School of English
Limerick Language Centre
MLC Ireland
MLI
OHC Dublin
Shandon Language Solutions
Swan Training Institute
The Linguaviva Centre
The Slaney Language Centre
Travelling Languages
Twin English Centre
UCC Language Centre
University of Limerick Language Centre

Non-respondents:

Berlitz Language School
Dublin Cultural Institute
ELCI
English Language & Training for Adults T/A ELTA
Englishour
Mackdonald Language Academy
Moyle Park
Pace Language Institute
Rightword
The English Path
Ulearn