

# Annual Report on English Language Training in Ireland 2025



English  
Education  
Ireland

**BONARD**  
EDUCATION

# Annual Report on English Language Training in Ireland • 2025



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## Prepared on behalf of:



### Address:

Unit 4, Manor Street Business Park, Dublin 7, Ireland  
+353-1-618-0910 /11  
[www.englisheducationireland.ie](http://www.englisheducationireland.ie)  
[info@englisheducationireland.ie](mailto:info@englisheducationireland.ie)

## Prepared by:



### Address:

Museumstraße 3b/16, 1070 Vienna, Austria  
+43-650-612-4527  
[www.bonardeducation.com](http://www.bonardeducation.com)  
[education@bonard.com](mailto:education@bonard.com)

## Sponsored by:



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### Address:

192 Sloane Street, London, SW1X 9QX, United Kingdom  
+44-20-3564-7044  
[www.languagecert.org](http://www.languagecert.org)  
[andy.harrison@peoplecert.org](mailto:andy.harrison@peoplecert.org) | [lucy.horsefield@peoplecert.org](mailto:lucy.horsefield@peoplecert.org)

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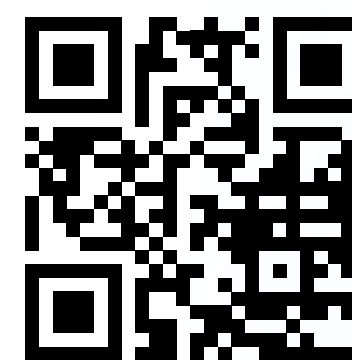
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**For more information contact: Andy Harrison and Lucy Horsefield**

Email: [andy.harrison@peoplecert.org](mailto:andy.harrison@peoplecert.org); [lucy.horsefield@peoplecert.org](mailto:lucy.horsefield@peoplecert.org)

[www.languagecert.org](http://www.languagecert.org)



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# Foreword

Dear Members and Readers,

It is my pleasure to present the 2025 Annual Report on English Language Training in Ireland, a year that tested the resilience of our sector and, in many ways, confirmed its underlying strength.

2025 was a year of genuine contrast. Ireland continued to attract strong international student interest, with overall student numbers growing by 2% year-on-year to reach 124,789. That is a meaningful achievement in a challenging environment, and a testament to Ireland's enduring reputation for quality, safety, and a genuinely welcoming student experience.

Yet the challenges we faced were real and consequential. Stricter visa and immigration policies, rising costs of living, and broader pressures on global student mobility combined to reduce average programme duration significantly, from 6.4 weeks in 2024 to 4.9 weeks in 2025. Total student weeks fell by 18%, and the financial impact was felt acutely by schools whose revenue is tied to length of stay. The sector's direct economic contribution rose to €817.6 million, but that figure masks the pressure many of our members experienced at the operational level.

One of the most significant structural shifts visible in this year's data is the continued movement away from adult learners toward younger students. In 2025, junior students accounted for 57% of all enrolments but only 20% of total student weeks. Adult students, while still generating 80% of student weeks, have been in gradual decline for several years, as rising English proficiency in key source markets, greater price sensitivity, and evolving immigration conditions have made longer adult stays more difficult to sustain. This is not a trend unique to Ireland, and our data places us alongside comparable European destinations such as the UK and Malta in navigating this shift. The junior segment, and Ministays in particular, continues to show strong momentum, and understanding how to build on that will be an important strategic question for the sector in the years ahead.

The adult segment told a more complex story this year. While enrolments grew modestly by 2%, average programme duration among adult students fell by 2.4 weeks, driven by policy changes affecting repeat courses and the financial requirements placed on prospective students from key source markets.

Brazil, which has been our largest source market by student weeks since 2014, saw a 20% reduction in student weeks. Across Latin America more broadly, several markets that have been central to Ireland's adult programme growth reported notable declines in student weeks, underscoring how sensitive this segment is to visa and immigration policy.

Alongside these pressures, the data points to areas of real strength and emerging opportunity. Italy consolidated its position as our largest source market, sending 47,693 students, a 5% increase. Japan delivered one of the standout performances of the year, with adult enrolments rising 47% and junior enrolments up 59%. Argentina, South Korea, Taiwan, Malaysia, and Hong Kong all improved their positions, pointing to a broadening of Ireland's international appeal and offering a clear direction for future market diversification.

Throughout 2025, our members were clear about what they needed from their association. Stronger government lobbying, practical visa guidance, market diversification support, and continued investment in quality accreditation frameworks were the recurring themes in every

survey wave. EEI heard those calls, and we will continue to act on them.

I want to thank the 56 member schools who contributed data and insights to this report. The depth and consistency of your engagement, across two survey waves and in a year of significant operational uncertainty, is what gives this research its authority and value. It is the foundation of every policy submission we make and every conversation we have on your behalf.

Ireland remains an exceptional destination for English language education. Our quality, our welcome, and our reputation endure. But sustaining that position requires coordinated action on visa policy, on market development, and on how we support our members through a period of structural change. That work continues.

Warm regards,  
**Lorcan O'Connor Lloyd**  
CEO, English Education Ireland

# Introduction

## 2025: Navigating Changes

In 2025, global student mobility is undergoing significant reorganisation due to policies tightening in major English-speaking destinations and ongoing geopolitical uncertainties. As a result, student demand is shifting toward alternative options in Europe and more regionally accessible study hubs.

In Ireland, the English Language Education (ELE) sector maintained strong student interest in 2025. However, accommodation pressures and changes in visa policies moderated demand, affecting enrolment patterns and progression pathways.

This edition builds on established reporting in Ireland's ELE sector and offers an overview of market performance, including year-on-year trends in student numbers and student weeks. The analysis is presented by programme type, student age segment, and nationality.

The report also features a provider profile, a summary of marketing and recruitment activity, and an assessment of the sector's direct economic impact.

## Acknowledgments

As always, we extend our sincere gratitude to all EEI member schools that contributed to this edition of the survey. Your support is invaluable to the advancement and representation of the sector.

## The EEI and BONARD Teams

**English Education Ireland (EEI)** 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.

As part of an ongoing partnership, EEI commissioned **BONARD** to conduct the sector survey for the second 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

# Methodology

The 2025 annual report draws on data collected from a sample-based survey of EEI member schools conducted in two online waves:

- July 3<sup>rd</sup> and August 15<sup>th</sup>, 2025 (collecting performance results for H1 2025)
- January 12<sup>th</sup> and February 25<sup>th</sup>, 2026 (collecting performance results for H2 2025 and full 2025)

As of January 2026, EEI comprised 60 member institutions, of which 56 participated in the survey, resulting in a strong response rate of 93%. The full population of schools under review for the 2025 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.

Participating schools submitted data on international students who commenced studies during the 2025 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)

## Methodological updates

The 2025 report adopts a semi-annual data collection method to improve data granularity and timeliness.

The survey scope and set of indicators remain aligned with the 2024 reporting scheme to ensure consistency and enable dynamic analysis.

In 2025, new questions were included to capture the international student population among EEI members who do not offer ELP programmes.

Year-on-year comparisons use a consistent like-to-like sample of 52 schools that participated in both the 2024 and 2025 surveys.

# 2025 Executive Summary

Participants  
2025:

**56**  
EEI members

International  
student numbers:

**124,789**  
students in 2025

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

Total  
student weeks:

**609,374**  
student weeks spent in 2025

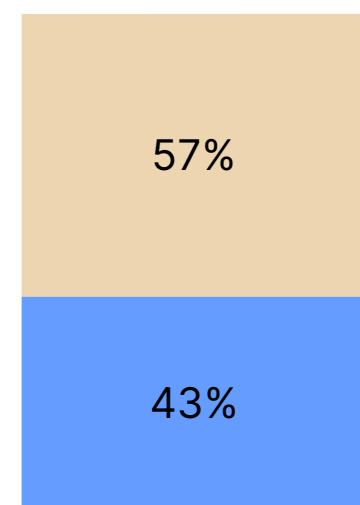
**-18%**  
Year-on-year change (%)

ELE sector direct  
economic impact  
in 2025:

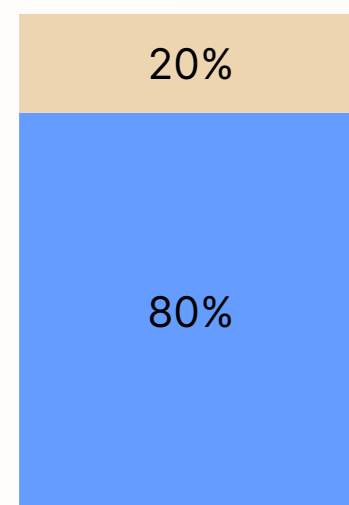
**€817.6**  
million

Adult-to-junior ratio:

● Adults  
● Juniors



Student numbers

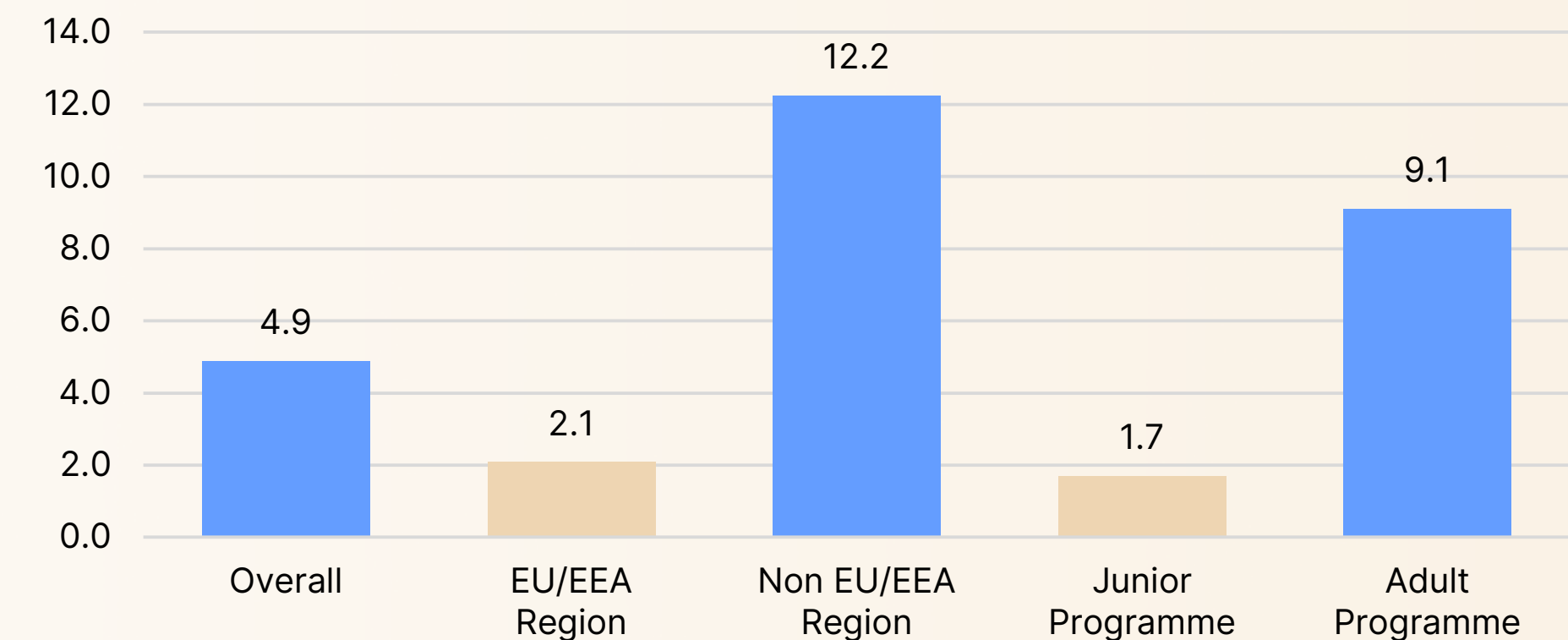


Student weeks

Top source markets  
by student weeks

- |           |              |
|-----------|--------------|
| 1. Brazil | 6. France    |
| 2. Italy  | 7. Mongolia  |
| 3. Mexico | 8. Japan     |
| 4. Spain  | 9. Argentina |
| 5. Chile  | 10. China    |

Average course duration (weeks)



# Market Overview: Global Context

In 2024, eight key destinations – Australia, Canada, Ireland, Malta, New Zealand, South Africa, the UK, and USA – hosted **1 million English language students, generating a total of 7.6 million student weeks.**

By 2024, the global English language teaching (ELT) sector recovered 73% of its 2019 student volume and 75% of student weeks, compared to pre-pandemic figures of 1.4 million students and 10 million student weeks.

**Ireland and Malta were the only destinations to exceed their 2019 student week levels.**

Ongoing geopolitical uncertainty, policy changes, and financial constraints are expected to influence student decision-making and destinations performance.

### Global Tension

- Key source markets are experiencing a global economic slowdown, with inflation and currency depreciation reducing outbound student mobility;
- The fuel crisis is expected to impact summer 2026 travel through higher airfares, reduced flight capacity, and weaker consumer demand.

### Shifting Landscape

- The UK, USA, Canada, and Australia are implementing stricter immigration policies and limits on international student numbers;
- Destinations beyond the traditional eight offering English-taught, as well as those providing courses in other languages, are gaining popularity due to greater affordability, more favourable visa conditions, and programmes tailored to varying levels of language proficiency.

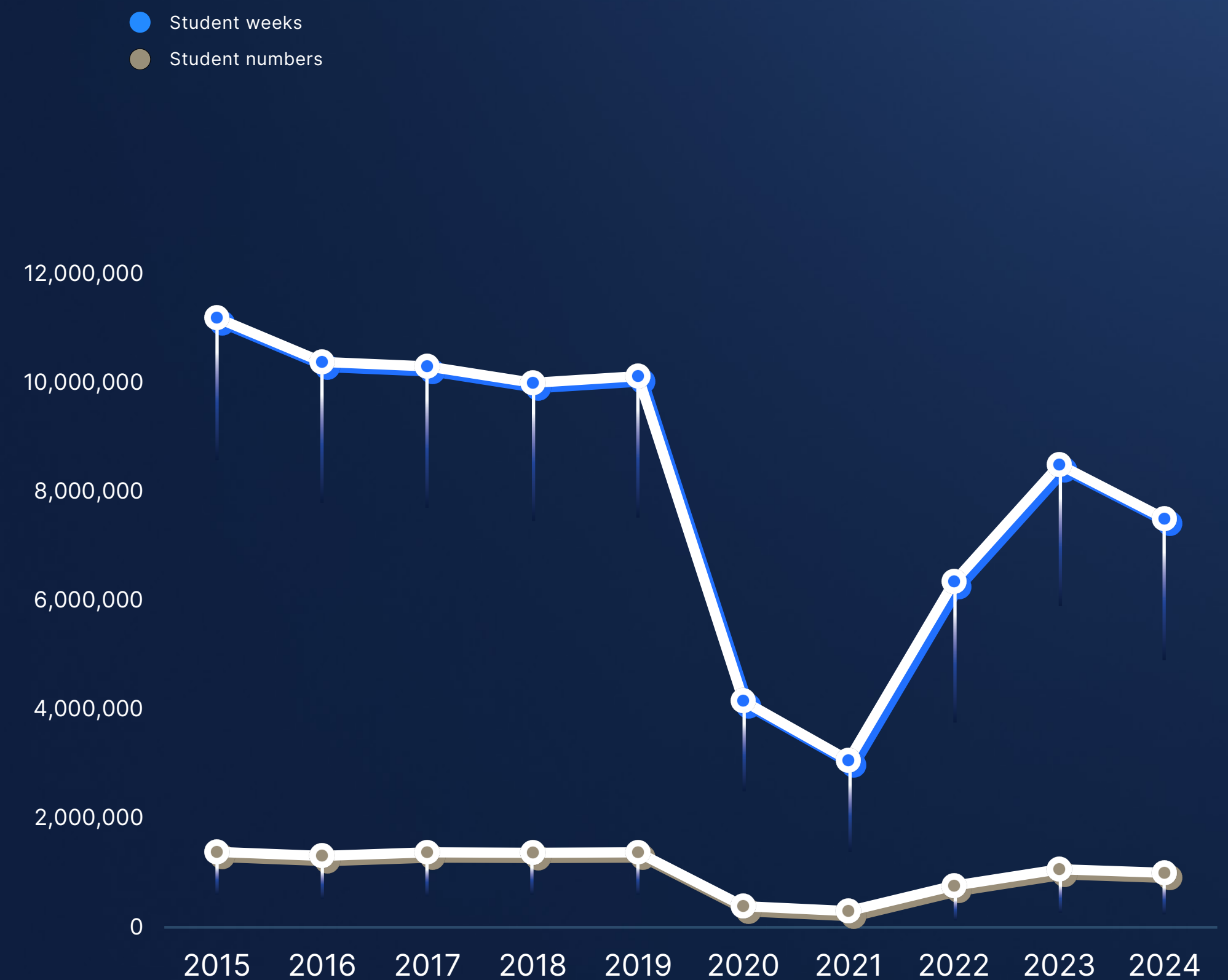
### Impact of technologies

- Online and AI tools will continue to disrupt the global ELT industry, as students in price-sensitive markets increasingly use independent English study options.

While demand for high-quality education and distinctive study experiences remains strong, **both students and sector stakeholders are adapting their behaviours:**

- A gradual shift towards younger cohorts, shorter programme durations, and increased intra-regional mobility is taking shape.
- Concurrently, the sector is undergoing greater consolidation, alongside programme adaptation to student expectations and increasing language proficiency.

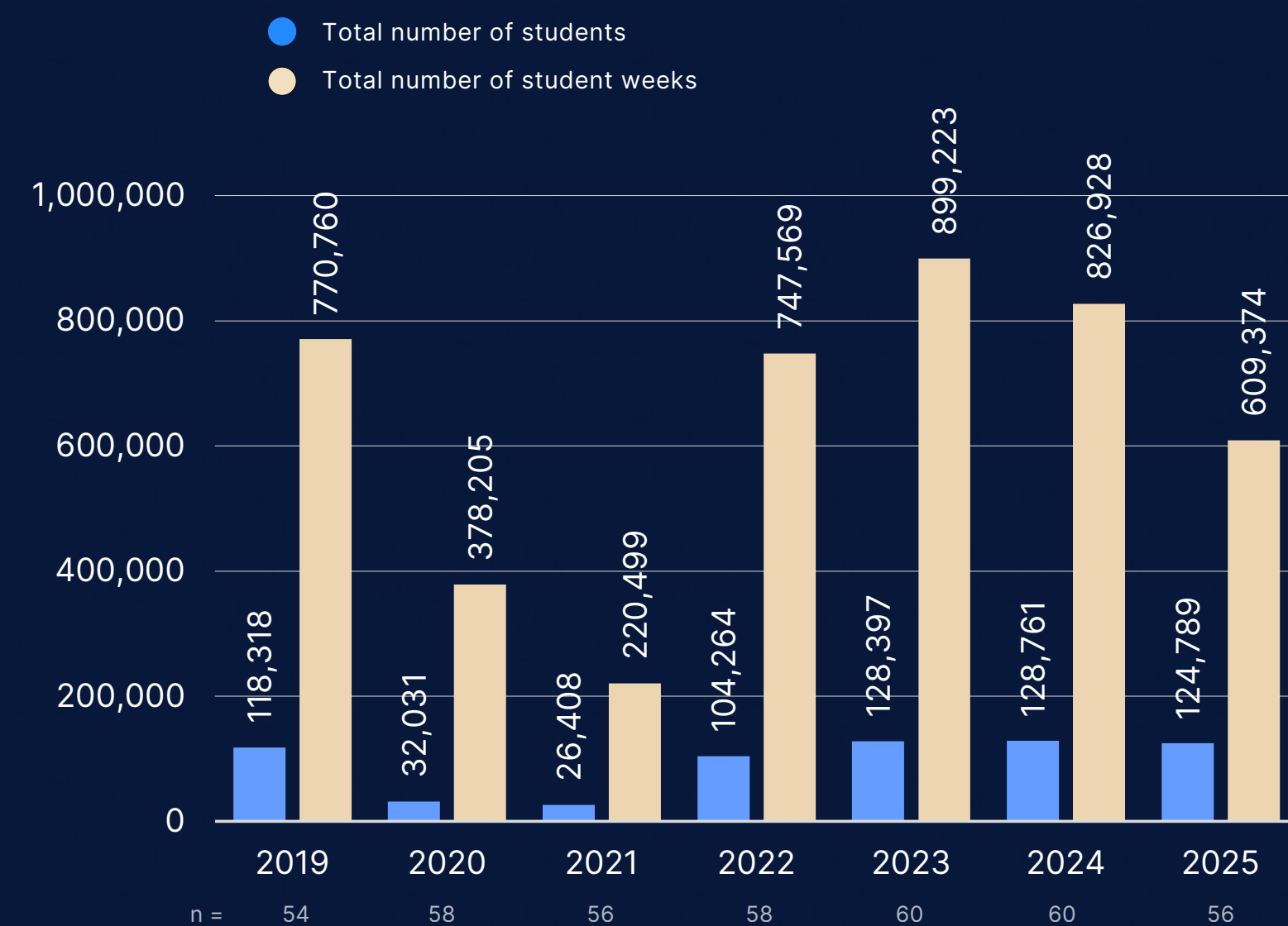
Total number of English language students and student weeks spent globally



**SOURCE:** English Australia, English New Zealand, English South Africa, English Education Ireland, Languages Canada, Malta National Statistical Office, English UK, EnglishUSA, 2025

# Market Overview: Ireland at a Glance

## Overall number of English language students and student weeks taught by EEI member schools 2019–2025



NOTE: 2019–2023 data is sample-weighted; 2024–2025 reflect reported volumes.

### Like-for-like comparison of 2024 vs 2025

	2025	2024	Change (%)
Student numbers	124,334	121,674	+2%
Student weeks	604,062	734,450	-18%
Average course duration (weeks)	4.9	6.0	-1.1

NOTE: Year on year change is based on data from schools reporting both 2024 and 2025, n=52 members

In 2025, the USA, UK, Australia, and Canada imposed stricter controls on student flows through higher visa requirements, tighter education sector regulations, increased costs, and related measures. Consequently, more English learners chose alternative destinations, including Ireland.

**Student demand for Irish English Language Programmes (ELP) remained strong** in 2025, reflecting the destination’s growing appeal and effective recruitment efforts. In 2025, 56 reporting member schools hosted **124,789 international English language students** from over 122 countries. On a like-for-like basis, this represents **a 2% increase** in student numbers compared to 2024. The moderate growth is observed in both Junior and Adult student segments.

Western European students remained the primary region for Irish English programmes, with 88,435 enrolments in 2025, accounting for 71% of the total student population. **Italy was the largest market**, with 47,693 students in 2025, reflecting a 5% year-on-year increase.

**Asian student numbers** reached 7,509 in 2025, accounting for 6% of the total and reflecting **a 12% increase** from 2024. The main markets driving this growth were Japan (2,565 students, +50% year-on-year), South Korea (1,085 students, +36%), Taiwan (735 students, +49%), and Hong Kong (375 students, +190%).

At the same time, a worsening accommodation shortage and new measures affecting both prospective and current students **significantly reduced the duration of ELP students’ stays in 2025, with an average of 4.9 weeks recorded, down by 1.2 weeks compared with 2024.**

A total of **609,374 weeks of English study were reported, an 18% decline** compared to 2024. Adult Programme students accounted for 90% of this decrease, with students from Brazil (35%), Panama (19%), China (11%), and Turkey (13%) contributing most to the reduction in Adult student weeks.

### Average course duration (weeks)



# Market Overview: Ireland at a Glance

The ELE sector in Ireland has traditionally been driven by junior students (under 18). In 2025, the adult-to-junior ratio remained stable at 43% to 57%.

Junior students made up 57% of total enrolments among EEI members and accounted for 20% of total student weeks in 2025, due to shorter average course durations of 1.7 weeks.

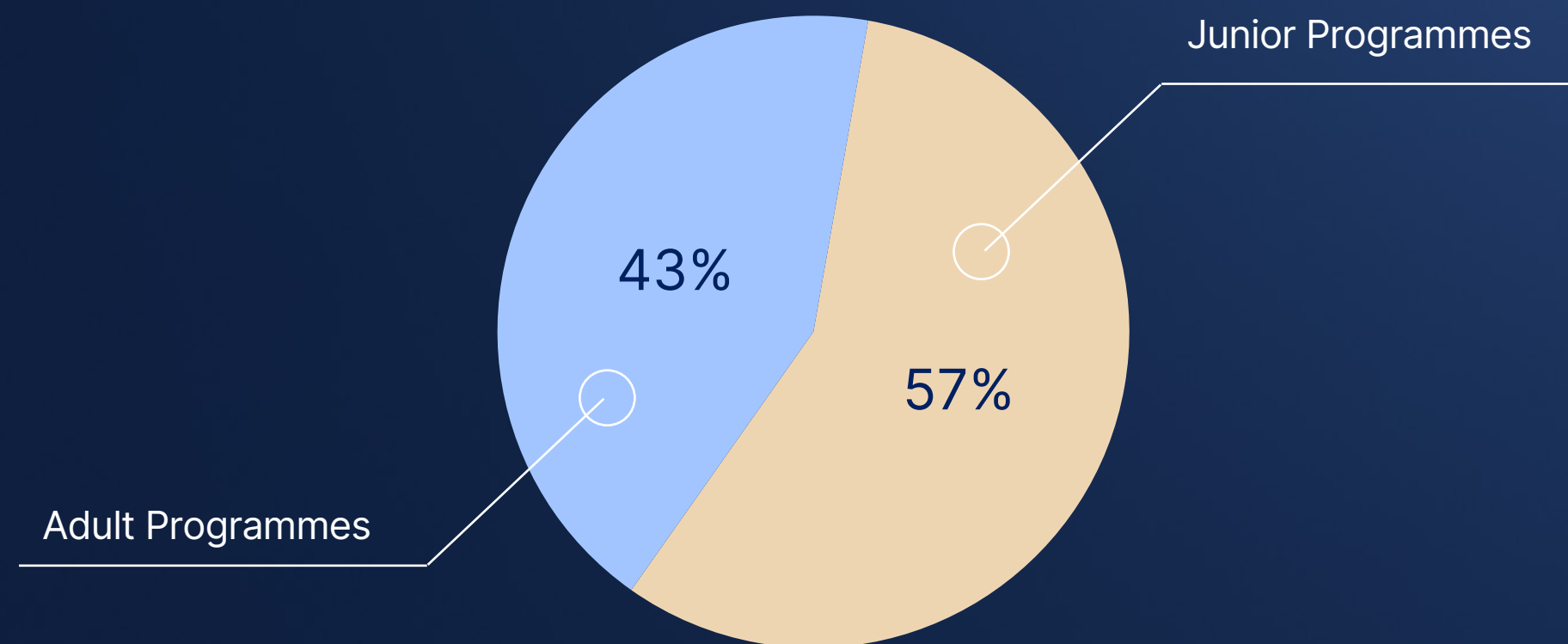
Compared to 2024, the share of student weeks generated by junior students increased by +2 percentage points, rising from 18% to 20% on a like-for-like basis. This shift was primarily driven by a reduction in the average length of stay among adult students.

## Programmes offered to ELP students by EEI members in 2025

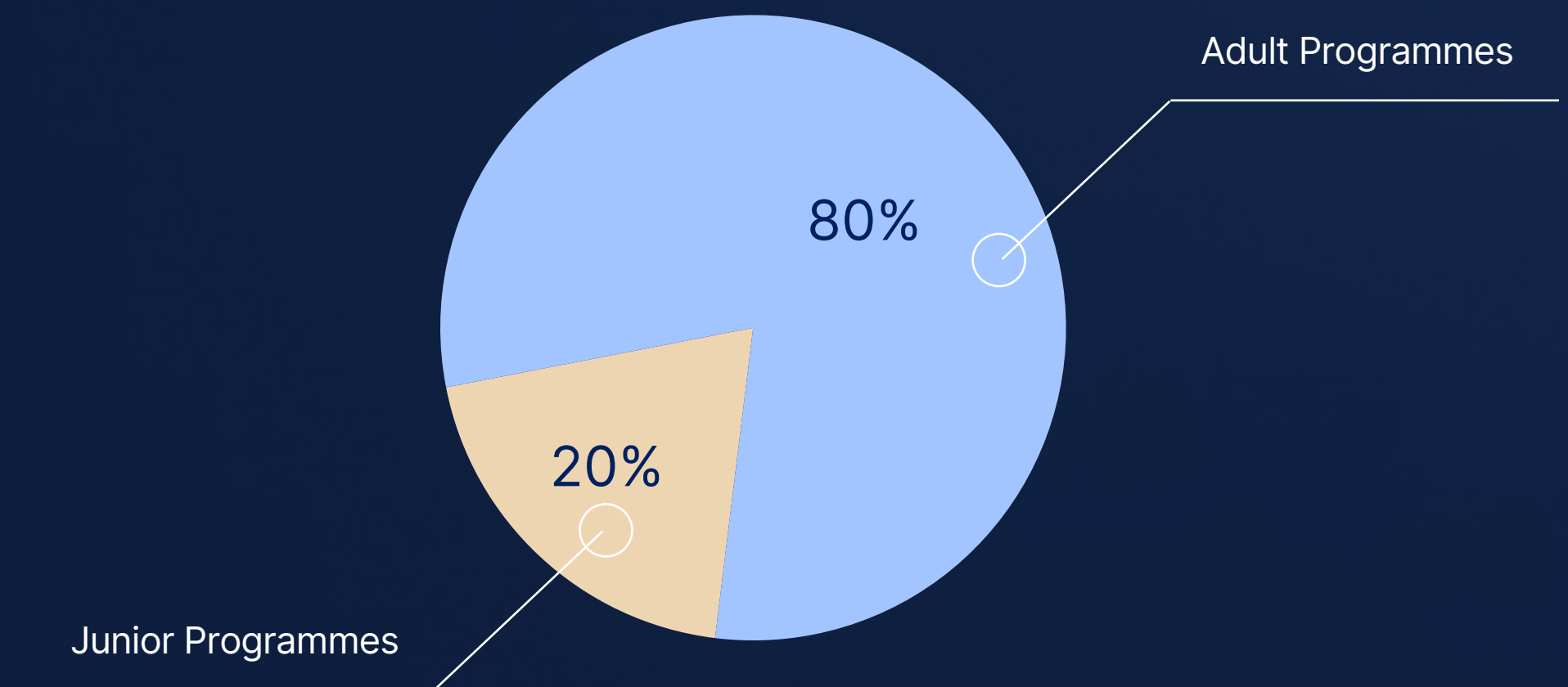
	Share of students (%)	Share of student weeks (%)
<b>Junior Programmes</b>	<b>57%</b>	<b>20%</b>
Ministays	38%	9%
Junior Programmes	18%	7%
High School Programmes	1%	4%
<b>Adult Programmes</b>	<b>43%</b>	<b>80%</b>

## Programmes offered to ELE students by EEI members in 2025

### Student numbers



### Student weeks



NOTE: n=56 members

# Market Overview: Ireland at a Glance

Western Europe remained the largest source region of students in 2025, with 88,435 enrolments, an 3% increase from 2024. Italy contributed the most students (47,693, up 5%), followed by Spain (20,982, down 5%), Austria (6,583, up 2%), and France (6,442, down 3%). Western European students chose the shortest course durations, averaging 2.1 weeks, which indicated a clear preference for shorter programmes.

Latin American (LATAM) students accounted for the largest share of total student weeks, overall spending 317,013 weeks studying in 2025. The average course duration stood at 14.0 weeks. Brazil, Mexico, and Chile delivered the highest number of student weeks from the region - 171,389, 65,485, and 29,911 weeks, respectively.

Asian student enrolments increased to 7,509 in 2025, by 12% year-on-year. The largest nationalities from the region were Japan (2,565, up 50%), South Korea (1,085, up 36%), China (1,078, down 43%), and Mongolia (985, down 22%).

The Middle East and Africa accounted for a smaller share of total enrolments; however, this was partially offset by longer average lengths of stay, at 8.3 and 15.5 weeks respectively.

## Source regions of English language students

	Student numbers 2025	Share (%) student numbers 2025	Change (%) in student numbers (Like-to-like)	Student weeks 2025	Change (%) in student weeks (Like-to-like)	Average course duration (weeks)
Western Europe	88,435	71%	+3%	183,786	-7%	2.1
Eastern Europe	3,813	3%	+12%	10,430	-20%	2.7
LATAM	22,712	18%	0%	317,013	-20%	14.0
Asia	7,509	6%	+12%	76,568	-15%	10.2
The Middle East	1,718	1%	-35%	14,323	-59%	8.3
Africa	289	<1%	-45%	4,472	-46%	15.5
Other	312	<1%	+52%	2,782	+116%	8.9

NOTE: n=56 members; year on year change is based on data from schools reporting both 2024 and 2025, n=52 members

# Market Overview: Adult vs Junior Segment

In 2025, participating members welcomed 71,008 junior students, representing a 2% increase from 2024. These students accounted for 120,541 student weeks, a 10% decrease compared to 2024.

There is a shift in junior offerings, contributing to an overall decline in student weeks. Shorter Ministays are gaining popularity year-on-year, with 46,791 enrolments (a 6% increase) and an average duration of 1.1 weeks. Junior programmes maintained stable enrolment levels at 22,829 students in 2025; however, the average course duration decreased slightly to 1.9 weeks, down by 0.1 weeks compared to 2024. High School Programmes, offered by 25% of schools and averaging 16.5 weeks in average course duration, contributed 22,836 student weeks in 2025, a 37% decrease.

The adult segment exhibited a similar trend, with enrolments increasing moderately to 53,781 students in 2025. However, this growth was accompanied by a decline in total student weeks to 488,833, representing a 20% decrease compared to 2024. This reflects a notable reduction in average programme duration, which fell to 9.1 weeks—2.4 weeks shorter than the previous year.

## ELE students and student weeks by programmes in EEI member schools

	Student numbers 2025	Student weeks 2025	Average course duration (weeks)	Change (%) student numbers (Like-to-like)	Change (%) student weeks (Like-to-like)
Junior Programmes	71,008	120,541	1.7	+3%	-10%
Ministays	46,791	53,552	1.1	+6%	+5%
Junior Programmes	22,829	44,153	1.9	0%	-5%
High School Programmes	1,388	22,836	16.5	-37%	-37%
Adult Programmes	53,781	488,833	9.1	+2%	-20%
<b>Total</b>	<b>124,789</b>	<b>609,374</b>	<b>4.9</b>	<b>+2%</b>	<b>-18%</b>

**NOTE:** n=56 members; year on year change is based on data from schools reporting both 2024 and 2025, n=52 members

# Market Overview: Adult vs Junior Segment

In a global context, junior students make up the majority of enrolments in traditional destinations, including Ireland (57%), Malta (50%), and the UK (62%).

In contrast, English language teaching (ELT) sectors in countries such as Australia, the United States and Canada have traditionally catered predominantly to adult learners.

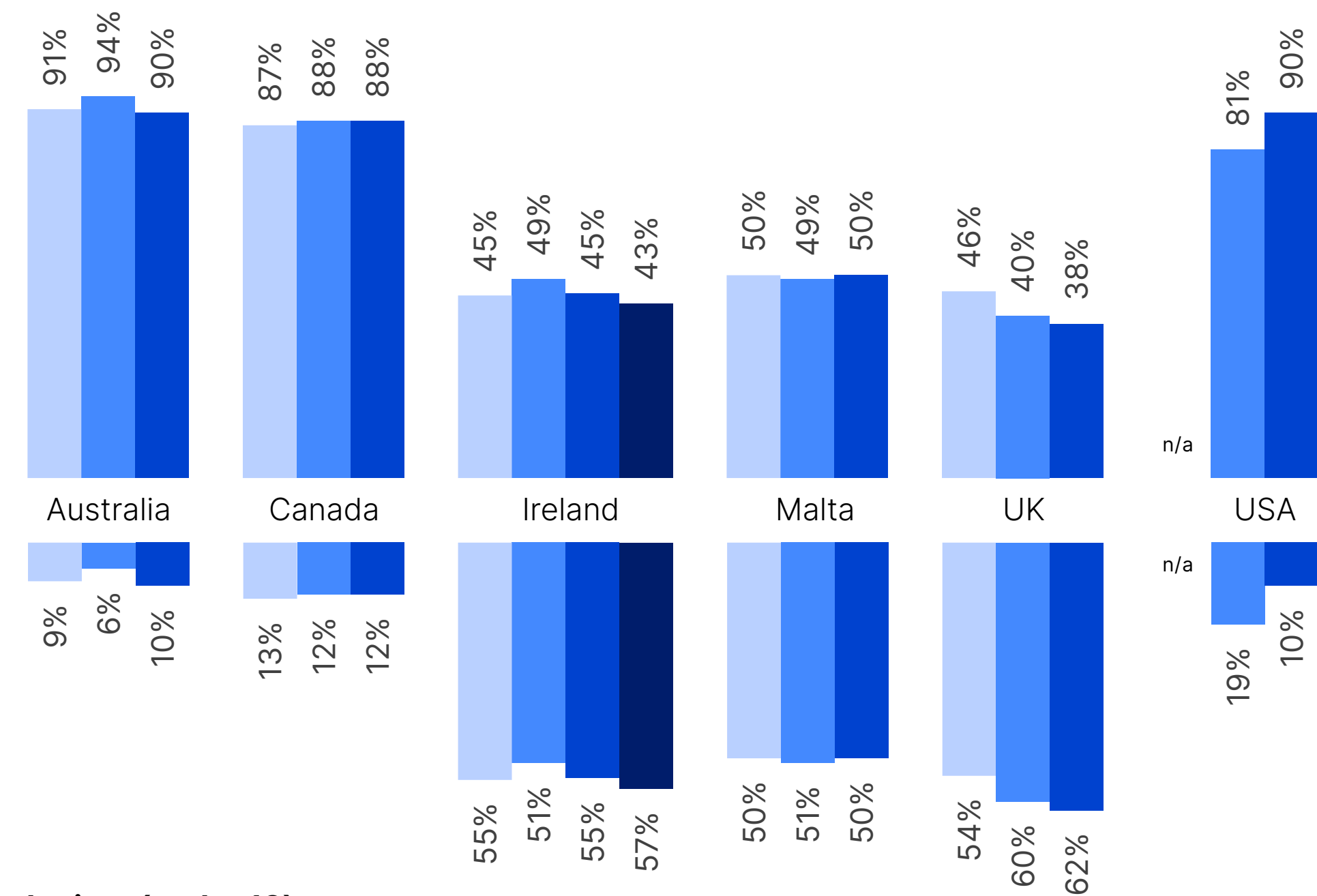
In Ireland, juniors accounted for 57% of enrolments in 2025 but contributed only 20% of total student weeks. This disparity reflects the growing popularity of shorter programmes, such as Ministays, a trend evident since 2023.

As English proficiency rises and local provision expands, combined with greater price sensitivity, the adult segment is expected to keep contracting. Consequently, future growth in the ELT sector will likely come from the junior segment.

In Ireland, adult segment demand strong in 2025, but the average duration of stay declined significantly due to policy changes and ongoing accommodation shortages.

Adult-to-junior student numbers ratio across different destinations

## Adults



## Juniors (under 18)

SOURCE: English Australia, Languages Canada, EEI, Malta National Statistical Office, English UK, EnglishUSA, 2025

# Market Overview: Adult vs Junior Segment

Italy (60,083 student weeks spent in 2025) and Spain (31,073) were the leading source markets for Junior programmes, with students from these countries showing interest across all programme types.

Austrian students preferred Ministays, French students favored Junior programmes, and German, Chinese, and Ukrainian students showed greater interest in High School programmes.

Brazil and Mexico continued to be the top source countries for Adult Programmes, with the highest total student weeks spent - 170,931 and 64,124 respectively. Austrian students predominantly opted for Ministays

programmes, while French students showed a preference for traditional Junior Programmes. In contrast, German, Chinese, and Ukrainian students demonstrated greater interest in High School Programmes.

## Top 10 source markets by ELP student weeks spent in Junior programmes combined

	Student numbers 2025	Student weeks 2025	Average course duration (weeks)	Change (%) student numbers (Like-to-like)	Change (%) Student weeks (Like-to-like)
Italy	39,580	60,083	1.5	+3%	-6%
Spain	16,159	31,073	1.9	-3%	-17%
Austria	6,203	6,445	1.0	0%	0%
Germany	1,125	4,774	4.2	-10%	-42%
France	1,998	3,573	1.8	-17%	-48%
China	205	1,609	7.8	-30%	-10%
Ukraine	305	1,591	5.2	-16%	+24%
Japan	580	1,468	2.5	+59%	+3%
Mexico	458	1,362	3.0	+57%	+84%
Argentina	599	1,325	2.2	+69%	+84%

**NOTE:** n=39 members; year on year change is based on data from schools reporting both 2024 and 2025, n=34 members

## Top 10 source markets by ELP student weeks spent in Adult programmes

	Student numbers 2025	Student weeks 2025	Average course duration (weeks)	Change (%) student numbers (Like-to-like)	Change (%) Student weeks (Like-to-like)
Brazil	12,213	170,931	14.0	+4%	-20%
Mexico	4,178	64,124	15.3	-2%	-12%
Chile	1,883	29,725	15.8	+9%	-4%
Italy	8,113	23,021	2.8	+21%	+19%
Spain	4,823	20,726	4.3	-9%	-12%
Mongolia	937	19,545	20.9	-26%	-27%
Japan	1,986	17,364	8.7	+47%	+37%
France	4,445	16,972	3.8	+5%	-4%
Argentina	922	13,620	14.8	+18%	+13%
China	873	12,236	14.0	-46%	-52%

**NOTE:** n=43 members; year on year change is based on data from schools reporting both 2024 and 2025, n=38 members

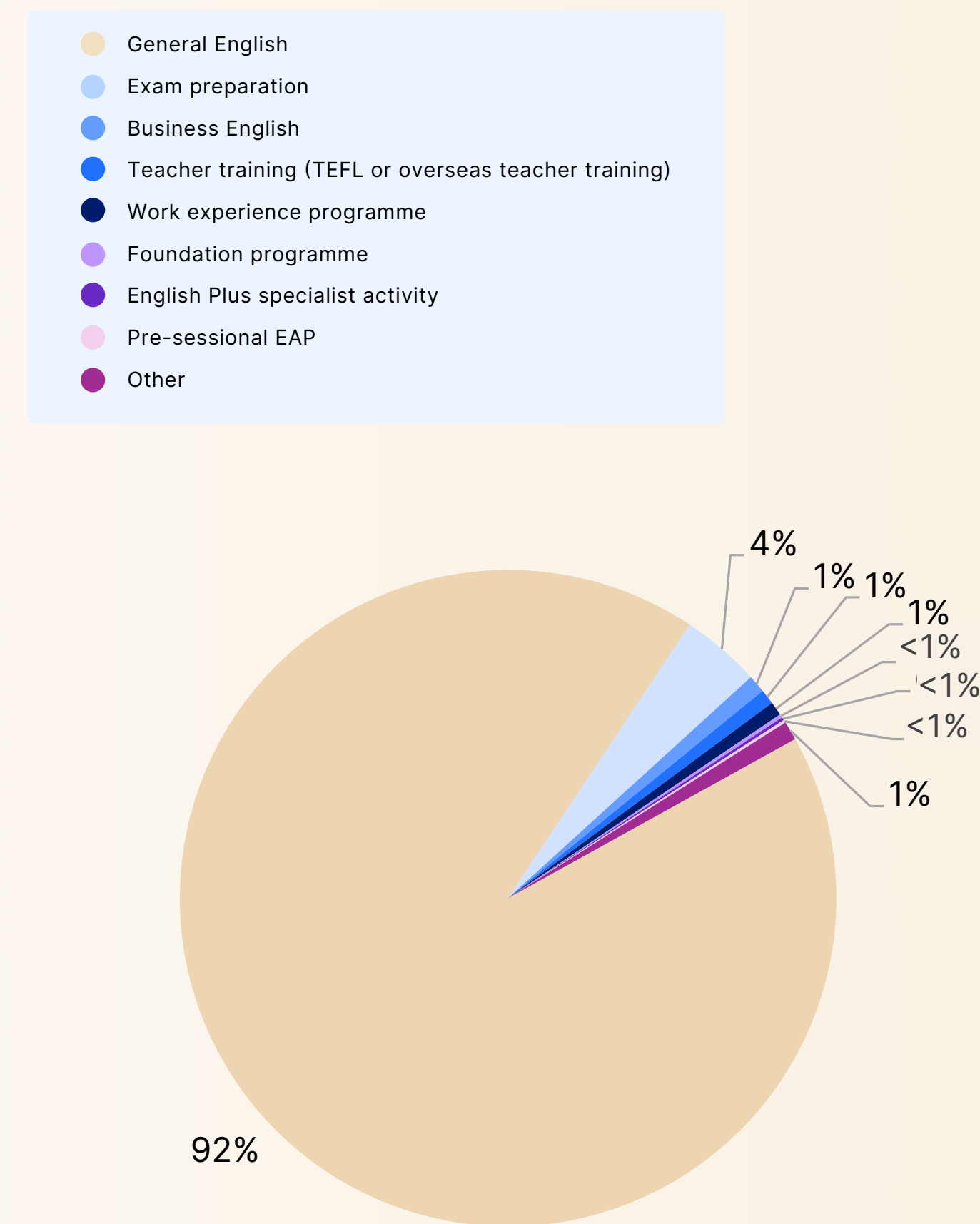
# Market Overview: Adult vs Junior Segment

General English remains the most popular course among adult students, with 87% enrolled and accounting for 92% of total weeks spent by adults in 2025.

Exam preparation and Teacher training programmes each accounted for 4% of adult student enrolments in 2025.

Following the overall trend in the adult segment, average course duration declined across most programme types. Exam preparation courses saw the largest decrease, dropping by 6.4 weeks on average between 2025 and 2024. Teacher Training and Work experience programmes experienced smaller declines of 0.3 and 2.8 weeks, respectively.

Adult programmes by share of student weeks in 2025



Adult programmes by share of students and average course duration in 2025

Programme	Share (%) student numbers	Average course duration (weeks)	Change (weeks) in course duration
General English	87%	9.1	-4.7
Exam preparation	4%	9.4	-6.4
Teacher training (TEFL or overseas teacher training)	4%	1.6	-0.3
Business English	2%	3.8	-3.2
Work experience programme	1%	4.2	-2.8
Other	2%	7.6	-4.2

NOTE: n=41 members; year on year change is based on data from schools reporting both 2024 and 2025, n=40 members

# Market Overview: Source Markets

The top 10 source markets represented 80% of total student volumes and student weeks in 2025. The composition of these nationalities slightly changed compared to 2024.

The top five markets remained consistent:

- LATAM countries with visa-free access included: **#1 Brazil** (171,389 student weeks in 2025, a 20% decrease from 2024 was driven by Adult Programmes), **#3 Mexico** (65,485, down 11%), and **#5 Chile** (29,911, down 4%).
- EU/EEA countries included: **#2 Italy** (83,104, no change overall, increasing interest towards Adult Programmes) and **Spain** (51,798, down 15%, across both Adult and Junior Programmes).

Several nationalities significantly improved their rankings in 2025, including:

- Argentina** (14,945 student weeks in 2025, up 17%) entered the top 10 in 2025, rising from #12 to #9. **Costa Rica** (4,737, up 18%) moved to #20.
- Among Asian visa-free markets, **Japan** ranked #8 (18,832 student weeks in 2025, up 33%, driven by Adult Programmes). **South Korea** rose to #12

(7,704, up four positions), **Taiwan** to #14 (7,021, up four positions), and **Malaysia** to #19 (4,822, up seven positions).

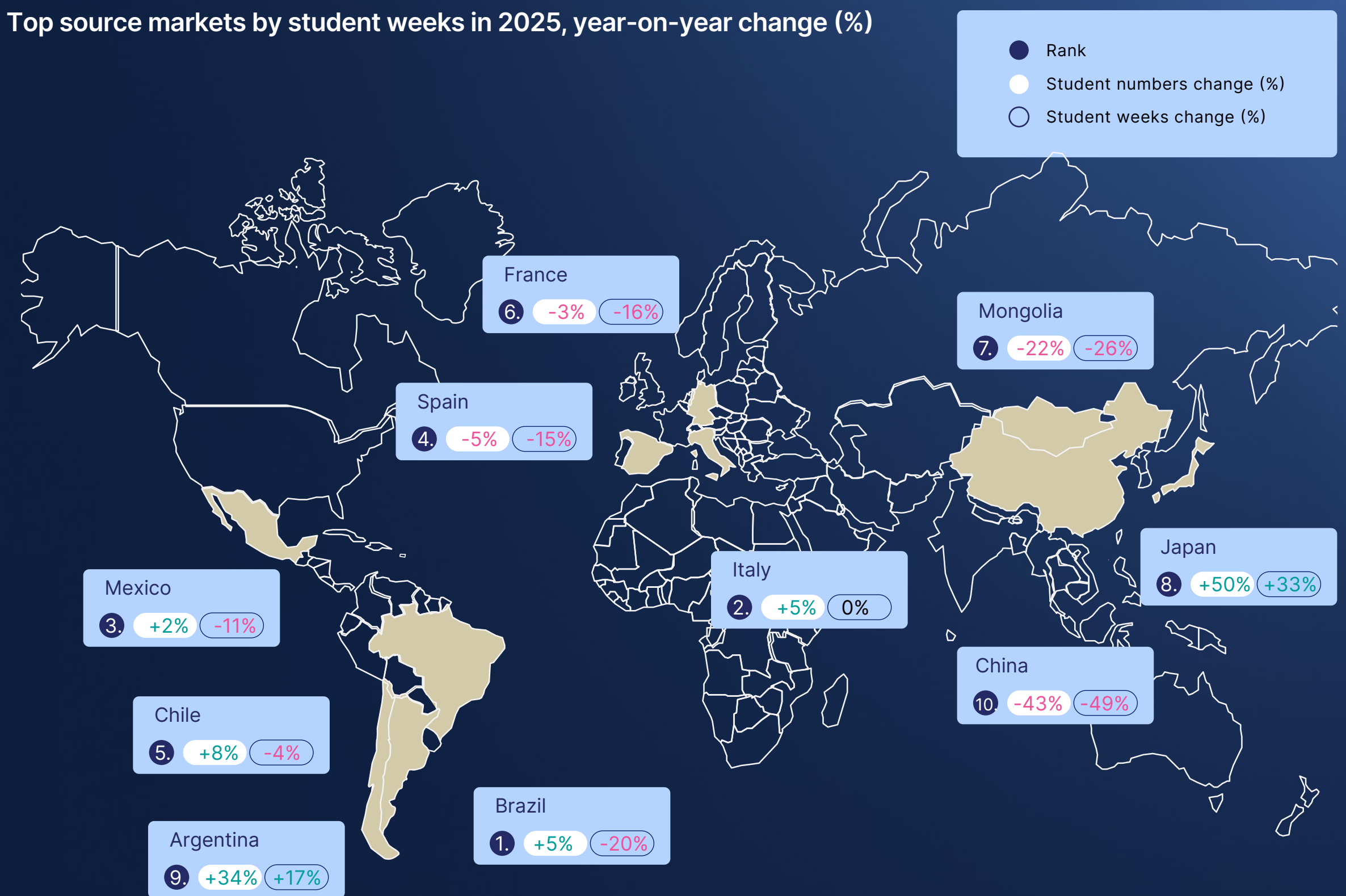
- Austria** (6,951, up four positions) and **Switzerland** (5,053, up four positions) also improved their rankings among EU/EEA markets.

The positive momentum observed for **China** and **Mongolia** in 2024 was not sustained in 2025. Both markets recorded declines in student numbers and student weeks, exceeding 40% and 20%, respectively, primarily driven by reduced participation in Adult Programmes.

Several emerging growth markets for English language programmes (ELP) in Ireland, particularly outside the EU and EEA, included:

- Ukraine** and **Hong Kong** were an important source of students in 2025, especially for the Junior segment, with 2,807 and 913 total student weeks recorded.
- Lebanon** accounted for 2,819 student weeks in 2025, primarily driven by Adult Programmes.

Top source markets by student weeks in 2025, year-on-year change (%)



Source market	Student numbers change (%)	Student weeks change (%)
11. Germany	+10%	-12%
12. South Korea	+36%	0%
13. Panama	-67%	-75%
14. Taiwan	+49%	-1%
15. Austria	+2%	+1%
16. El Salvador	-20%	-21%
17. Türkiye	-44%	-69%
18. Switzerland	+54%	+22%
19. Malaysia	+135%	+149%
20. Costa Rica	+35%	+18%

NOTE: Year on year change is based on data from schools reporting both 2024 and 2025, n=52 members.

# Market Overview: Source Markets

## Top 50 source markets in 2025 by student weeks

Source country	Group	Student numbers 2025	Student weeks 2025	Change (%) student numbers	Change (%) student weeks	Average course duration (weeks)
1. Brazil	Non-EU/EEA Region (Visa is not required)	12,367	171,389	+5%	-20%	13.9
2. Italy	EU/EEA Region	47,693	83,104	+5%	0%	1.7
3. Mexico	Non-EU/EEA Region (Visa is not required)	4,636	65,485	+2%	-11%	14.1
4. Spain	EU/EEA Region	20,982	51,798	-5%	-15%	2.5
5. Chile	Non-EU/EEA Region (Visa is not required)	1,945	29,911	+8%	-4%	15.4
6. France	EU/EEA Region	6,442	20,545	-3%	-16%	3.2
7. Mongolia	Non-EU/EEA Region (Visa is required)	985	19,720	-22%	-26%	20.0
8. Japan	Non-EU/EEA Region (Visa is not required)	2,565	18,832	+50%	+33%	7.3
9. Argentina	Non-EU/EEA Region (Visa is not required)	1,521	14,945	+34%	+17%	9.8
10. China	Non-EU/EEA Region (Visa is required)	1,078	13,844	-43%	-49%	12.8
11. Germany	EU/EEA Region	3,614	11,742	+10%	-12%	3.2
12. South Korea	Non-EU/EEA Region (Visa is not required)	1,085	7,704	+36%	0%	7.1
13. Panama	Non-EU/EEA Region (Visa is not required)	449	7,480	-67%	-75%	16.7
14. Taiwan	Non-EU/EEA Region (Visa is not required)	735	7,021	+49%	-1%	9.5
15. Austria	EU/EEA Region	6,583	6,951	+2%	+1%	1.1
16. El Salvador	Non-EU/EEA Region (Visa is not required)	325	6,940	-20%	-21%	21.4
17. Türkiye	Non-EU/EEA Region (Visa is required)	854	6,740	-44%	-69%	7.9
18. Switzerland	EU/EEA Region	1,587	5,053	+54%	+22%	3.2
19. Malaysia	Non-EU/EEA Region (Visa is not required)	332	4,822	+135%	+149%	14.5
20. Costa Rica	Non-EU/EEA Region (Visa is not required)	274	4,737	+35%	+18%	17.3
21. Colombia	Non-EU/EEA Region (Visa is required)	281	3,425	-35%	-51%	12.2
22. Guatemala	Non-EU/EEA Region (Visa is not required)	161	3,298	+134%	+232%	20.5
23. Uruguay	Non-EU/EEA Region (Visa is not required)	319	3,140	+24%	+31%	9.8
24. Saudi Arabia	Non-EU/EEA Region (Visa is required)	421	2,981	-50%	-73%	7.1
25. Lebanon *	Non-EU/EEA Region (Visa is required)	119	2,816	n.a.	n.a.	23.6
26. Paraguay	Non-EU/EEA Region (Visa is not required)	147	2,809	+21%	+25%	19.2

Source country	Group	Student numbers 2025	Student weeks 2025	Change (%) student numbers	Change (%) student weeks	Average course duration (weeks)
27. Ukraine	Non-EU/EEA Region (Visa is not required)	530	2,805	-2%	+6%	5.3
28. Russia	Non-EU/EEA Region (Visa is required)	816	2,514	+53%	-6%	3.1
29. Morocco	Non-EU/EEA Region (Visa is required)	89	2,011	-60%	-59%	22.7
30. Thailand	Non-EU/EEA Region (Visa is required)	143	1,857	+68%	+7%	13.0
31. Czechia	EU/EEA Region	667	1,219	-7%	-70%	1.8
32. Poland	EU/EEA Region	611	1,211	-28%	-21%	2.0
33. Belgium	EU/EEA Region	296	1,144	-1%	-7%	3.9
34. Portugal	EU/EEA Region	262	1,117	-26%	-41%	4.3
35. Hong Kong	Non-EU/EEA Region (Visa is not required)	375	913	+190%	+151%	2.4
36. Botswana *	Non-EU/EEA Region (Visa is required)	41	889	-23%	-14%	21.6
37. Bolivia	Non-EU/EEA Region (Visa is required)	48	834	-85%	-87%	17.2
38. Nicaragua	Non-EU/EEA Region (Visa is not required)	34	661	n.a.	n.a.	19.6
39. Peru	Non-EU/EEA Region (Visa is required)	47	608	-26%	-35%	12.8
40. Denmark	EU/EEA Region	193	536	-43%	+2%	2.8
41. Hungary	EU/EEA Region	268	521	+24%	+76%	1.9
42. Ecuador	Non-EU/EEA Region (Visa is required)	40	494	-18%	-24%	12.3
43. Kuwait *	Non-EU/EEA Region (Visa is required)	81	460	+2%	-60%	5.7
44. Senegal *	Non-EU/EEA Region (Visa is required)	52	444	+91%	+675%	8.5
45. Romania	EU/EEA Region	193	415	n.a.	n.a.	2.1
46. Venezuela	Non-EU/EEA Region (Visa is required)	84	406	+86%	-25%	4.8
47. Slovakia	EU/EEA Region	261	399	+97%	+36%	1.5
48. Oman *	Non-EU/EEA Region (Visa is required)	27	399	-17%	+13%	14.5
49. Netherlands	Non-EU/EEA Region (Visa is not required)	273	391	+220%	+31%	1.4
50. Kazakhstan	Non-EU/EEA Region (Visa is required)	22	377	-53%	-62%	16.9

**NOTE:** n=56 members; year on year change is based on data from schools reporting both 2024 and 2025, n=52 members.  
\* Nationalities reported by fewer than 10 schools in 2025

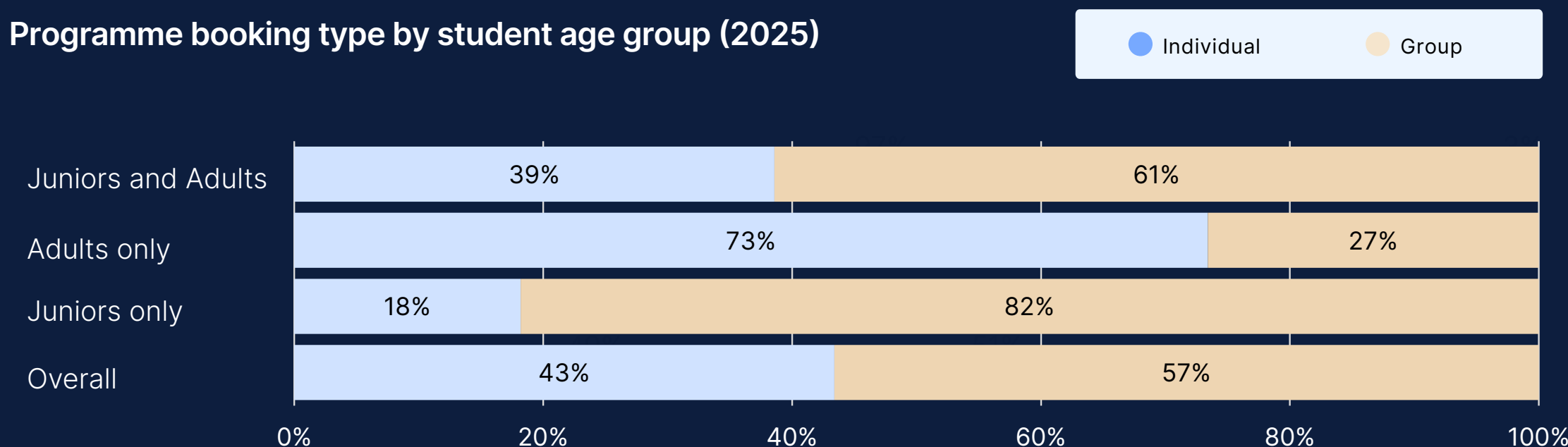
# Market Overview: Booking and Recruitment Channels

Group bookings accounted for 57% of students, primarily driven by the junior segment, while individual bookings accounted for 43% and were more commonly used by adult learners.

In 2025, 67% of students were enrolled through education agents. An additional 19% booked directly, 7% enrolled through government scholarships, and 5% through institutional agreements.

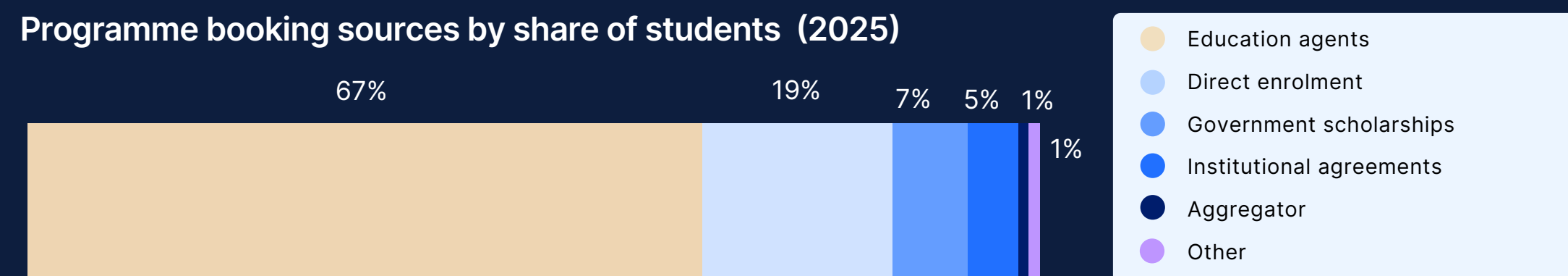
Education agents remained the primary source of programme information for students. This was complemented by the continued importance of word of mouth, while social media emerged as a strong third channel, underscoring its growing influence in the decision-making process.

Programme booking type by student age group (2025)



NOTE: n=49 members

Programme booking sources by share of students (2025)



NOTE: n=49 members

The most common channels through which students find programme information (2025)

Channel	Overall rank	Score
Education agency recommendation	1	687
Word of mouth	2	616
Social media	3	523
Education events	4	370
Printed and/or online advertising	5	302
Student fairs	6	289
Email campaigns	7	270
Adwords	8	212
Other	9	134

NOTE: n=48 members

# Market Overview: Provider Analysis

In 2025, 56 EEI member schools took part in the reporting scheme, collectively providing data on student enrolments in English language programmes.

Of these schools, 79% were independently owned private institutions, 14% were affiliated with a chain or group, and 7% were state institutions.

Most schools operate year-round (89%), while 11% operate seasonally. Over half (57%) enroll both junior and adult students.

Over 90% of schools enrolled EU/EEA students and non-EU/EEA students not requiring a visa, while 82% enrolled non-EU/EEA students who required a visa.

The 26 reporting schools operated 98 premises in Ireland. On average, each school operated 1.8 premises, with the largest providers reporting up to nine, including seasonal locations. Dublin had the highest concentration of EEI member schools, with 56% of premises located in the capital.

## EEI members by location in 2025

EEI members by location in 2025	Share of members (%)	Share of premise locations (%)
Dublin	64%	56%
Cork (South-West)	9%	7%
Mid-East	9%	5%
South-East	9%	5%
Limerick (Mid-West)	7%	5%
Galway	7%	4%
Other South-West	4%	3%
Other regions	14%	14%
Sample size:	56	98

## EEI member profile in 2025

	Share of members (%)
<b>By ownership</b>	
Private sector: Chain or group	14%
Private sector: Independently owned	79%
State	7%
<b>By student age</b>	
Juniors and adults	57%
Adults only	27%
Juniors only	16%
<b>By operations</b>	
Year-round	89%
Seasonal	11%
<b>By number of ELP international students</b>	
Large (1,500+ students)	43%
Medium (500 to 1,499 students)	34%
Small (fewer than 500 students)	18%
No ELP international students in 2025	5%
<b>By international student visa group</b>	
EU/EEA Region	98%
Non-EU/EEA Region (Visa not required)	92%
Non-EU/EEA Region (Visa required)	82%

NOTE: n=56 members

# Market Overview: Provider Analysis

In addition to students enrolled in English Language Programmes (ELP), members also offered a range of other programmes for international students, supporting the wider sector.

**In 2025, these schools reported hosting 1,098 international students** across both long-term and short-term programmes.

Overall, students represented more than 20 countries, with Spain, Brazil, and Italy among the most prominent nationalities.

Programmes	% share of students in 2025
<b>High School Full-Year(s) Programmes</b> (typically, 12-18 year olds)	54%
<b>High School Term(s) Programmes</b> (typically, 12-18 year olds)	27%
<b>Short-Stays Programmes</b> (typically, 12-18 year olds staying during term time)	12%
<b>Exchange Programmes</b> (typically, 12-18 year olds staying during term time)	3%
<b>Summer Programmes</b> (typically, 12-18 year olds staying during term time)	2%
<b>Adult Programmes</b> (typically, at least 18 years old on a range of programmes throughout the year, e.g. Work Experience)	2%

## Top 5 markets by student enrolments in 2025

Source market	Share of students
Spain	54%
Brazil	14%
Italy	12%
Germany	6%
France	4%

NOTE: n= less than 5

# Economic Impact: Tuition and Accommodation Fees

**Overall, the ELE sector contributed nearly €817.6 million directly to the Irish economy in 2025, a 5% increase from 2024.**

In 2025, EEI member schools generated approximately €170.6 million in revenue from direct educational activities, a 9% increase over 2024, driven by tuition and accommodation:

- Tuition remained the primary revenue source, accounting for 53% of total annual income and showing a 9% increase in gross revenue.
- Accommodation accounted for 34% of schools' revenue in 2025, with a 10% increase in gross revenue.

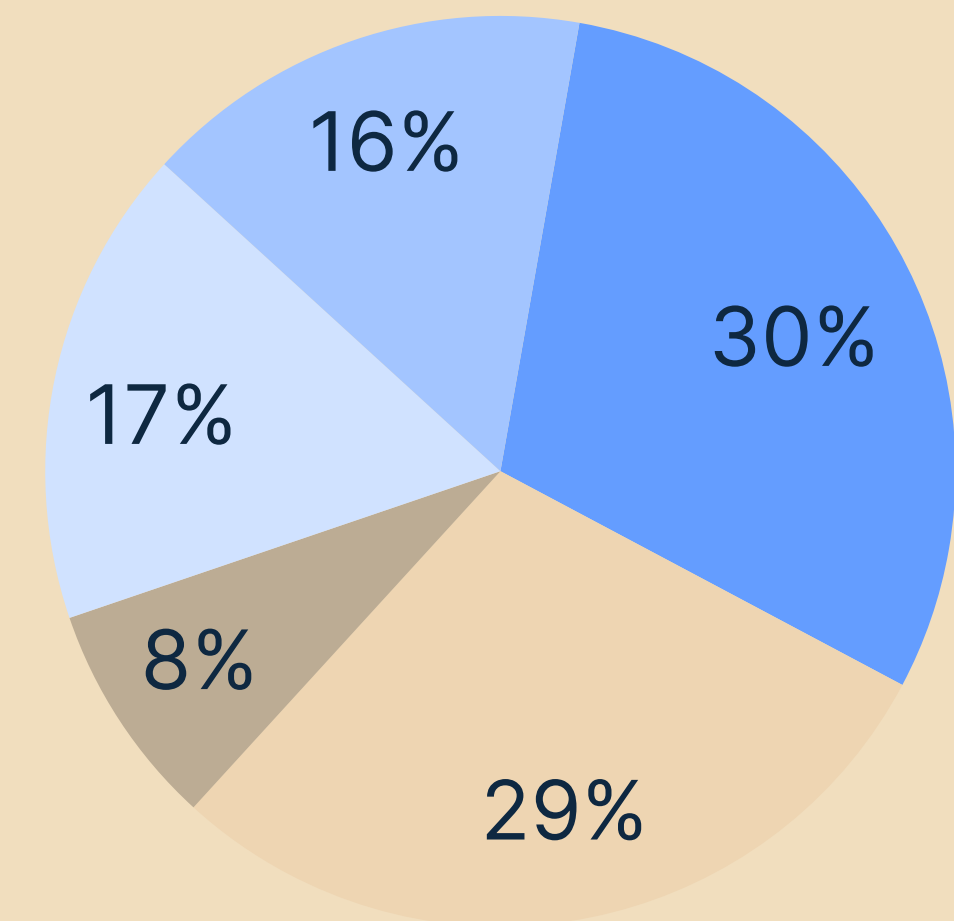
At the same time, around €58.5 million was paid in salaries to teaching, administrative and temporary staff, representing a 3% decrease compared with 2024, largely due to a reduction in overall sector employment during the year.

In 2025, each **English language student spent an average of at least €4,582.6 per stay**, which is €993.7 less than in 2024 due to shorter stays. This amount included:

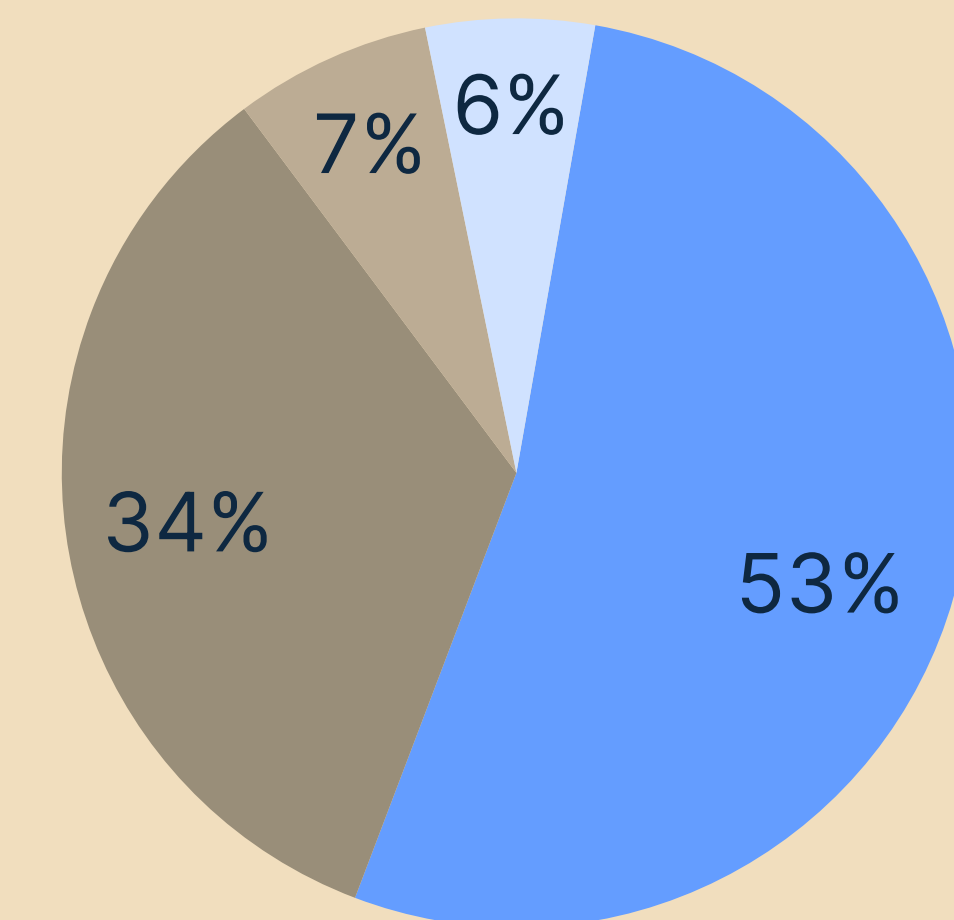
- Tuition fees – 29% of total expenses
- Accommodation – 31%
- Other direct expenses – 40%, covering transportation within Ireland, course materials, food, entertainment, health plans, gym access, and related costs.

These figures do not include additional costs such as visa fees, international travel, car rental, or spending by accompanying travelers.

**Estimate of total school revenues in 2025 (EUR)**



**An estimation of revenue split in 2025 (EUR)**



NOTE: n=49 members

# Economic Impact: Tuition and Accommodation Fees

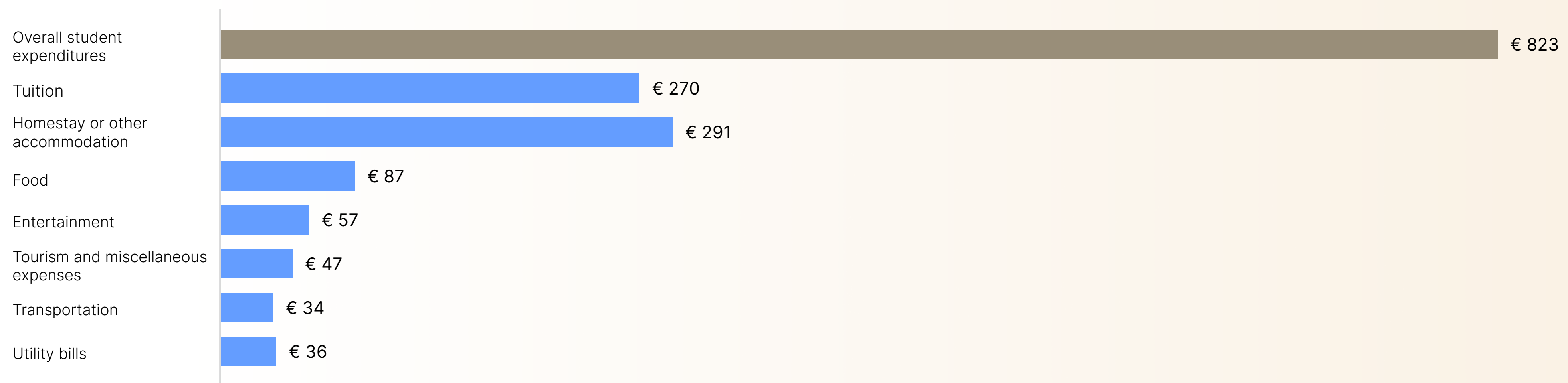
Average weekly expenditure for English language students stood at €823, representing an increase of €21 compared to 2024.

- Tuition was the main driver of the increase in weekly expenditure in 2025 versus 2024, rising by €78 to €270. Junior students had an average tuition expenditure of €307, while adult students paid €206 per week.
- Accommodation remained one of the largest expense categories, at €291 per week in

2025, which is €45 lower than in 2024. This decline was driven by a higher share of students opting for more affordable homestay accommodation in 2025 (€254 per week), while other accommodation types averaged €342.

- Additional weekly expenses for students, such as transportation, meals, course materials, entertainment, and other essentials, averaged €261.

**Average weekly expenditures per English language student in 2025 (EUR)**



**NOTE:** n=44 members

# Human Resources

In 2025, EEI member schools employed 2,391 staff during the peak season (June–August) and 1,344 during the off-peak period.

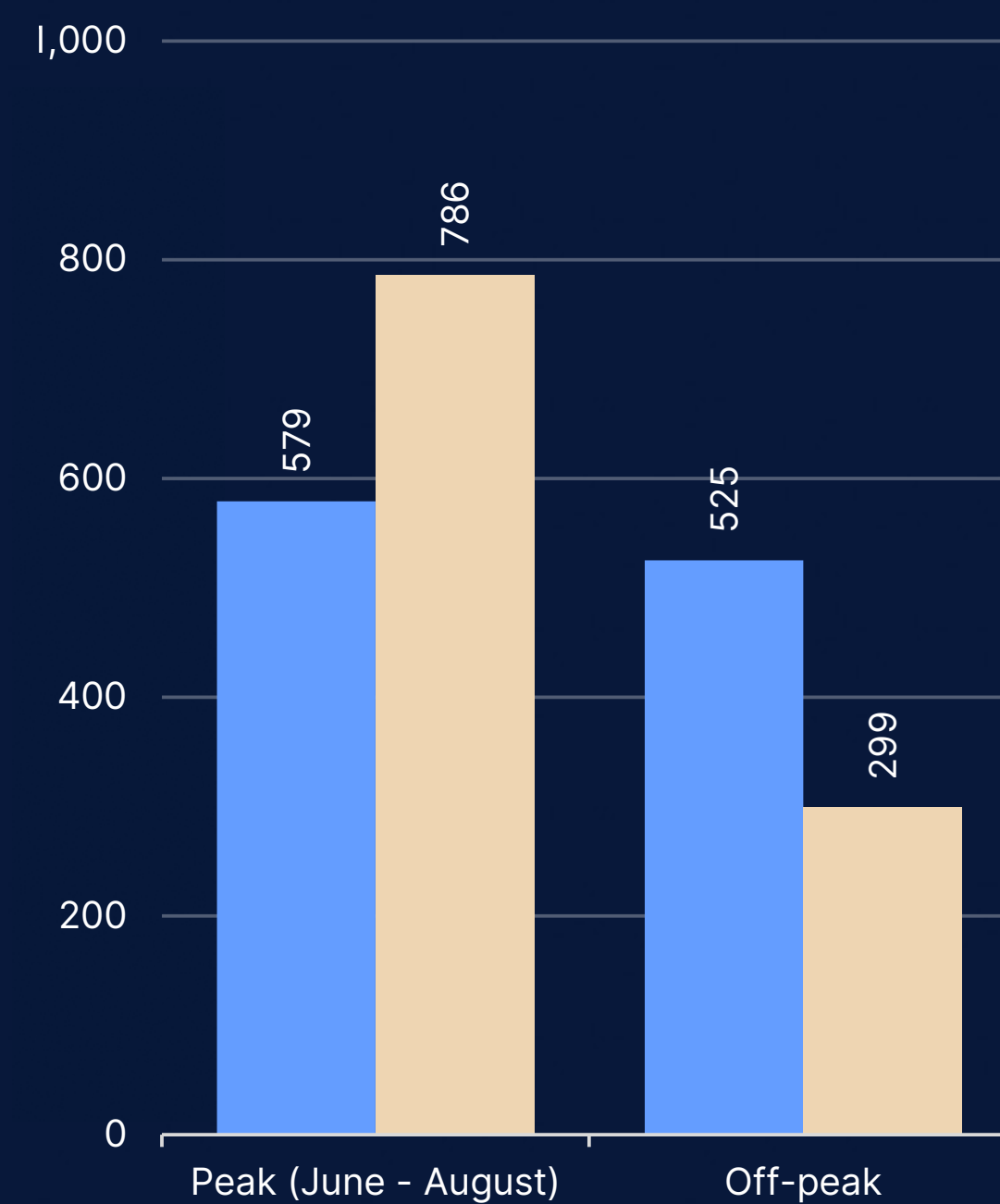
Compared to 2024, this represents a decline of 14% in peak-season staffing and 16% in off-peak staffing, indicating a reduction in workforce levels across both periods.

Of the total workforce:

- 59% were teaching staff
- 55% were employed on a full-time basis

## Average teaching staff employed in 2025

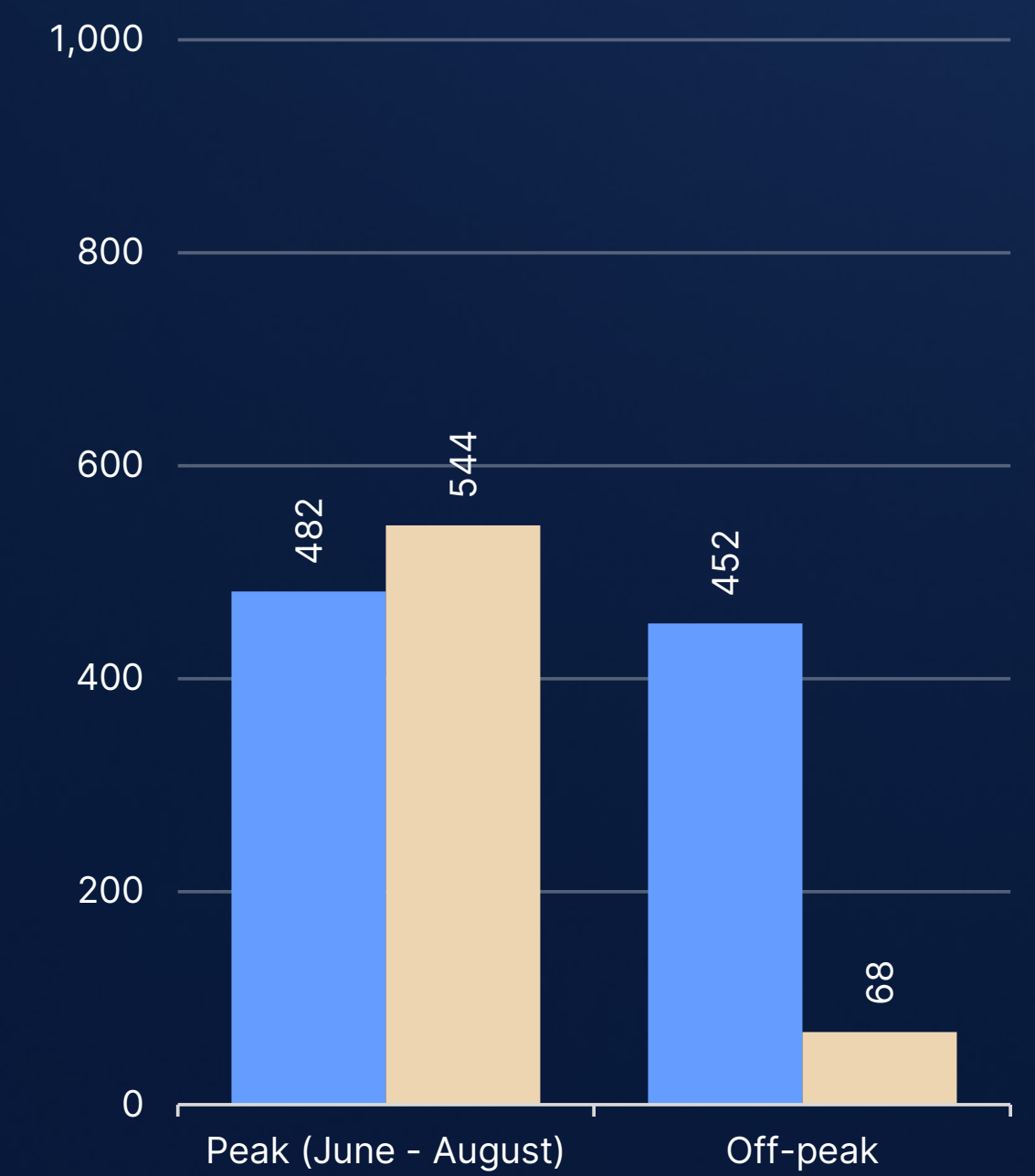
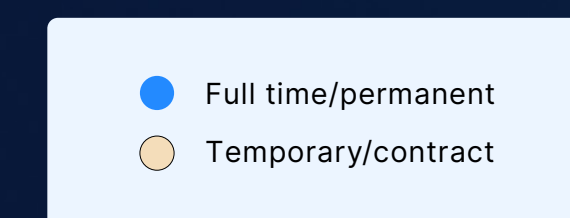
### Teaching staff



NOTE: n=41 members

## Average administrative staff employed in 2025

### Administrative/support staff



NOTE: n=41 members

# Accommodation

In 2025, schools reported offering 17,732 beds for English language students, with 58% provided by host families and 28% through independent accommodation providers.

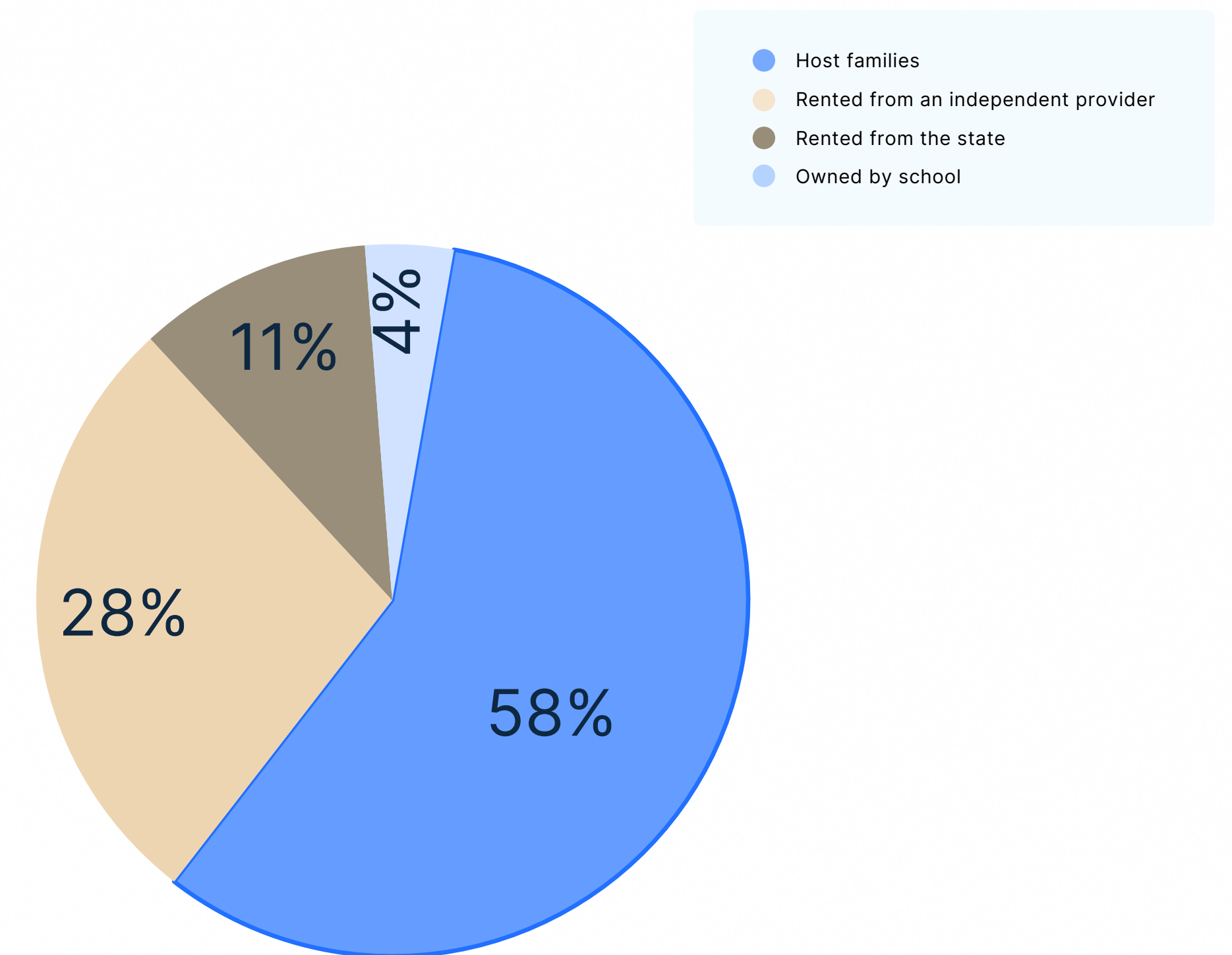
Overall accommodation availability was 33% lower than in 2024, with declines across all types: 65% fewer house shares, 42% fewer residencies and dormitories, and 20% fewer host families. This trend reflects the broader accommodation market in Ireland and significantly affects student demand and length of stay.

## The total number of beds provided by schools for English language students in 2025

	Number of beds	Change (%)
<b>Overall</b>	<b>17,732</b>	<b>-33%</b>
Host family	10,234	-20%
Residences / dormitories	6,968	-42%
House share	530	-65%
<b>Host family</b>		
Peak (June–August)	6,082	-15%
Off-peak	4,365	-4%

**NOTE:** n=39; year on year change is based on data from schools reporting both 2024 and 2025, n=38 members

Share of beds of the total number of beds provided by schools for English language students in 2025 by ownership type



# Challenges Faced by Programmes

In 2025, global student mobility was significantly reorganised as major English-speaking destinations tightened policies amid ongoing geopolitical uncertainties.

In Ireland, the English Language Education (ELE) sector faced accommodation shortages and visa policy changes, which reduced demand and affected enrolment and progression patterns.

In 2025, 46% of members cited ongoing challenges with student visa refusals. About 30% of schools also reported longer visa processing times and lower enrolments affecting budgets. These issues highlight the continued impact of policy constraints on enrolments and school finances.

A highly competitive environment remained a key concern, with 41% of EEI members citing domestic competition and 30% noting international competition from other destinations.

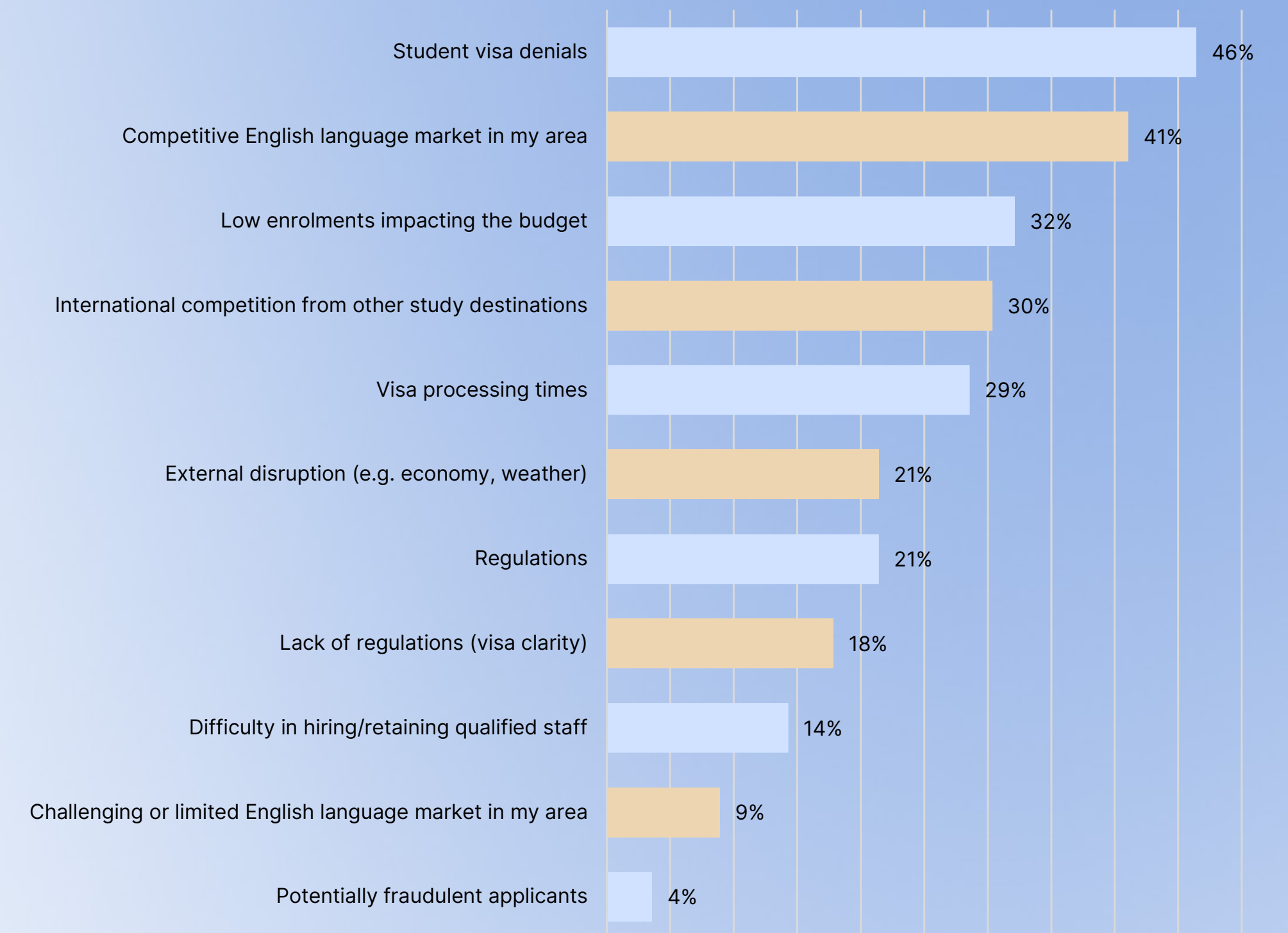
Notably, difficulties in hiring and retaining qualified staff were reported by only 14% of schools, suggesting a shift in focus towards maintaining stable student intake.

EEI members identified a need for stronger advocacy, clearer systems, and practical guidance. These needs arise as the sector faces policy changes, shrinking key markets, and rising costs while working to diversify and stay competitive.

The following priority areas were identified:

- Government lobbying and representation, including support with visas, funding thresholds, TrustEd, and broader policy alignment.
- Market development and marketing, such as assistance with market diversification, additional familiarisation trips, agent connections, and enhanced international marketing.
- Accreditation support for TrustEd and IEM, including practical assistance such as templates and access to consultants. Training and professional development, including CPD for staff, welfare training, and general upskilling.
- Operational support, such as guidance on escrow accounts, Garda vetting, and compliance processes. Regulation and enforcement, with stronger action against unregistered operators and unfair competition.

## Top challenges schools faced in 2025



NOTE: n=56 members, multiple options possible

# Appendix

## 2025 Survey Participants

Apollo Language Centre  
Asana International School  
ATC Language Schools  
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  
Dublin Cultural Institute  
EC Dublin  
Education First Dublin  
Einstein 2 English  
ELCI  
ELI Schools  
Emerald Cultural Institute  
English Language & Training for Adults T/A ELTA  
English Language Centre, University of Galway  
Englishhour  
Equinox Education Services

Everest Language School  
Future Learning  
HSI  
IBAT College  
ILSC English Language School (Berlitz Language School)  
International House Dublin  
Irish College of English  
ISI Dublin  
Kaplan International Languages  
Killarney School of English  
Limerick Language Centre  
Mackdonald Language Academy  
MLC Ireland  
MLI  
Moyle Park  
OHC Dublin  
Pace Language Institute  
Shandon Language Solutions  
Swan Training Institute  
The English Path  
The Linguaviva Centre  
The Slaney Language Centre  
Travelling Languages  
Twin English Centre  
UCC Language Centre  
University of Limerick Language Centre

Non-respondents:  
Atlantic School of English and Active Leisure LTD  
Erin College  
Rightword  
Ulearn