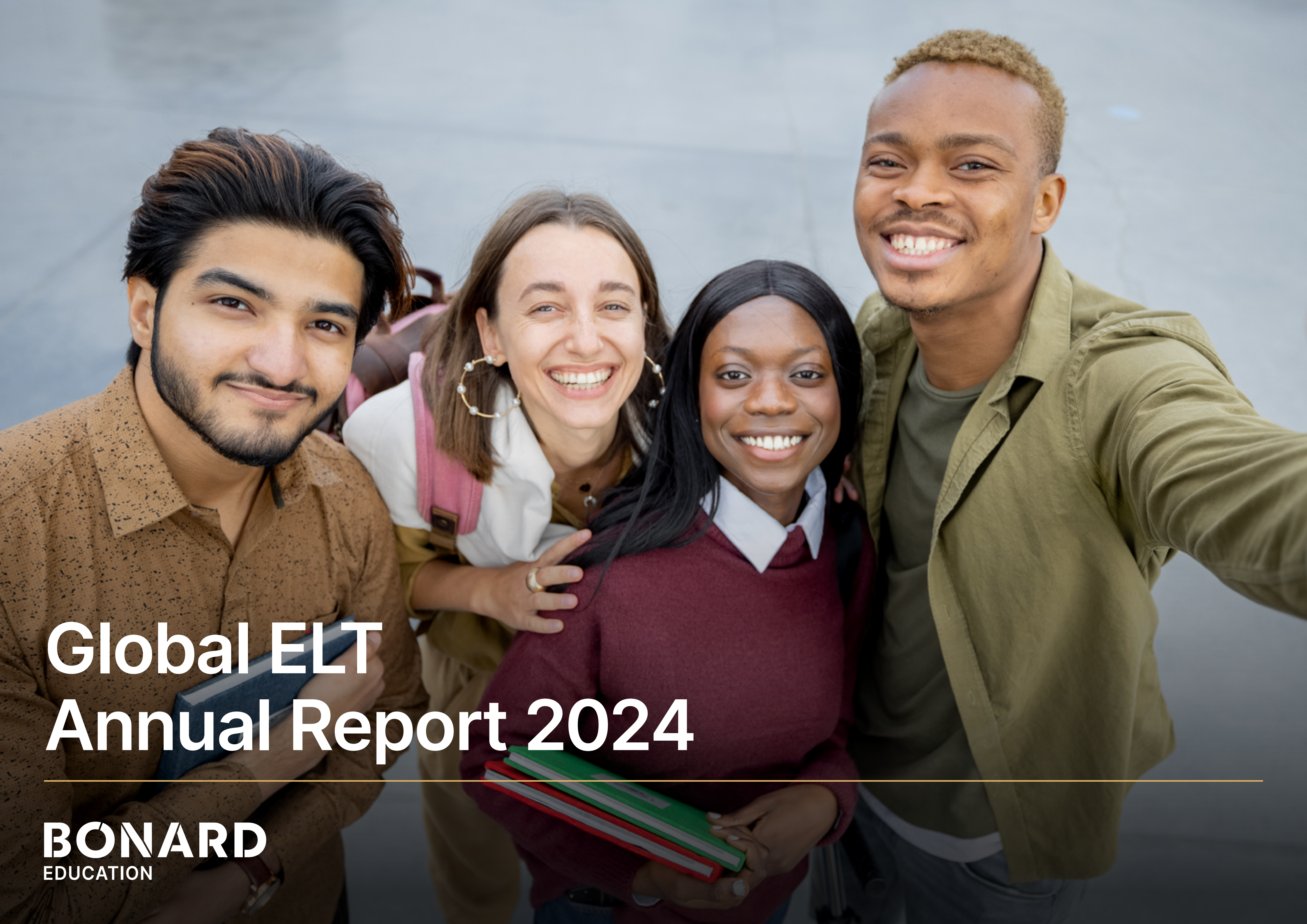


# Global ELT Annual Report 2024

BONARD
EDUCATION

**The story of 2023 features two main developments: uneven recovery across the main English language teaching (ELT) destinations and an overall slowdown in growth compared to 2022 as student demand normalised. BONARD's international education experts have examined the sector's performance in 2023, preliminary data for 2024, and major market dynamics to predict where it is headed.**

BONARD's annual research into the global ELT sector is an established model that spans eight destinations – Australia, Canada, Ireland, Malta, New Zealand, South Africa, the UK, and the USA – and serves as a comprehensive performance benchmark for the sector.

In 2023, these destinations collectively hosted 1.1 million English language students and generated 8.5 million student weeks. The figures include students of all ages and course types.

Globally, the ELT sector recovered 78% of its 2019 student numbers and 84% of student weeks (compared to 1.3 million students and 10 million student weeks in 2019), which ultimately fell short of stakeholder expectations.

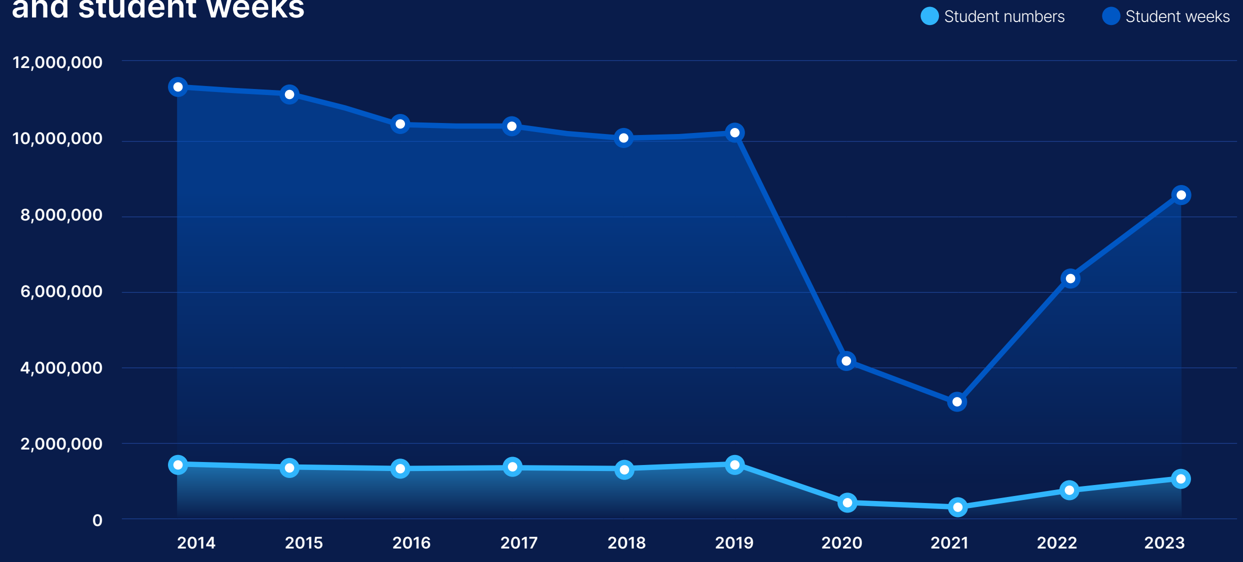
The picture is not uniform across destinations: while some surpassed pre-pandemic levels, others are still struggling to regain momentum.

*"Investigating the reasons for uneven recovery, we observed that there are broad forces at play that are reshaping student flows,"* noted Patrik Pavlacic, Chief Intelligence Officer at BONARD.

*"Among them, we observe increased pressure from political and regulatory changes in the major destinations, visa processing delays and refusals, shifts in students' preferences and requirements, especially when it comes to affordability and flexibility in course delivery, as well as the accelerated rise of local and transnational education provision. Over the past 12 months, these developments have placed significant pressure on ELT providers in the most mature destinations."*

**Patrik Pavlacic,**
Chief Intelligence Officer, BONARD

## Total number of English language students and student weeks




Source: BONARD, 2024; based on data from English Australia, English New Zealand, English South Africa, English UK, EnglishUSA, Institute of International Education, Languages Canada, English Education Ireland, National Statistics Office Malta

Note: The data captures all English language students travelling to one of the eight major ELT destinations. It covers students of all ages and all course types, including pathway and foundation programmes.

DESTINATION BENCHMARK

# Uneven recovery

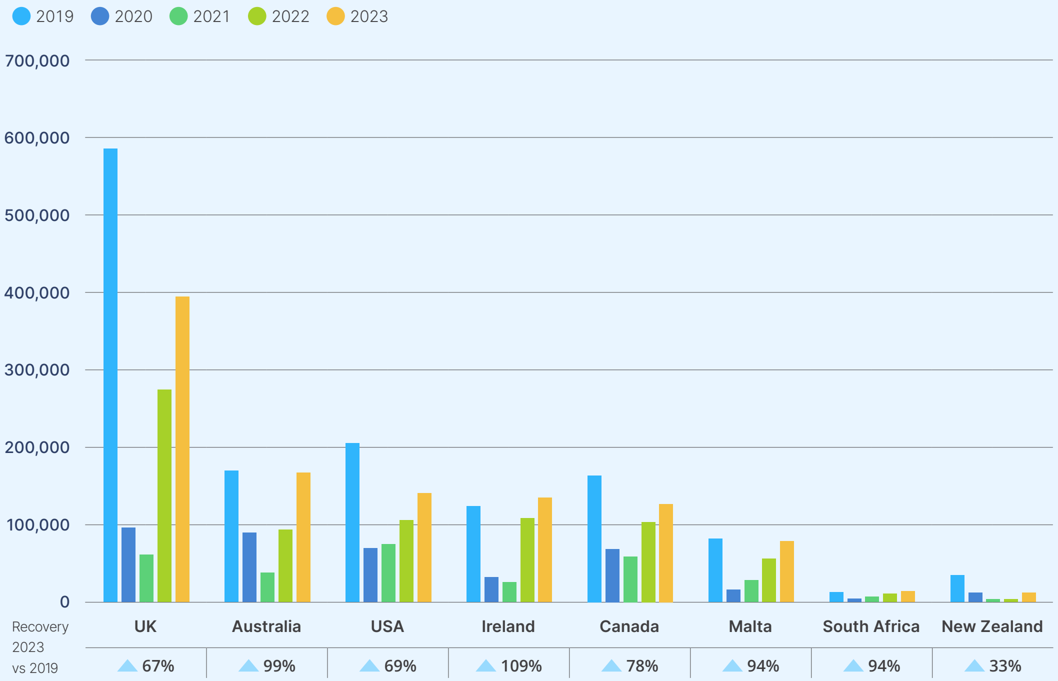
In 2023, three destinations stood out as the top performers: Australia, Ireland, and Malta.

All three exceeded their 2019 student intakes and improved their market share on the global stage. This is not entirely surprising, as they were key drivers of growth in the sector before 2019. Ivana Bartosik, BONARD's International Education Director, commented:

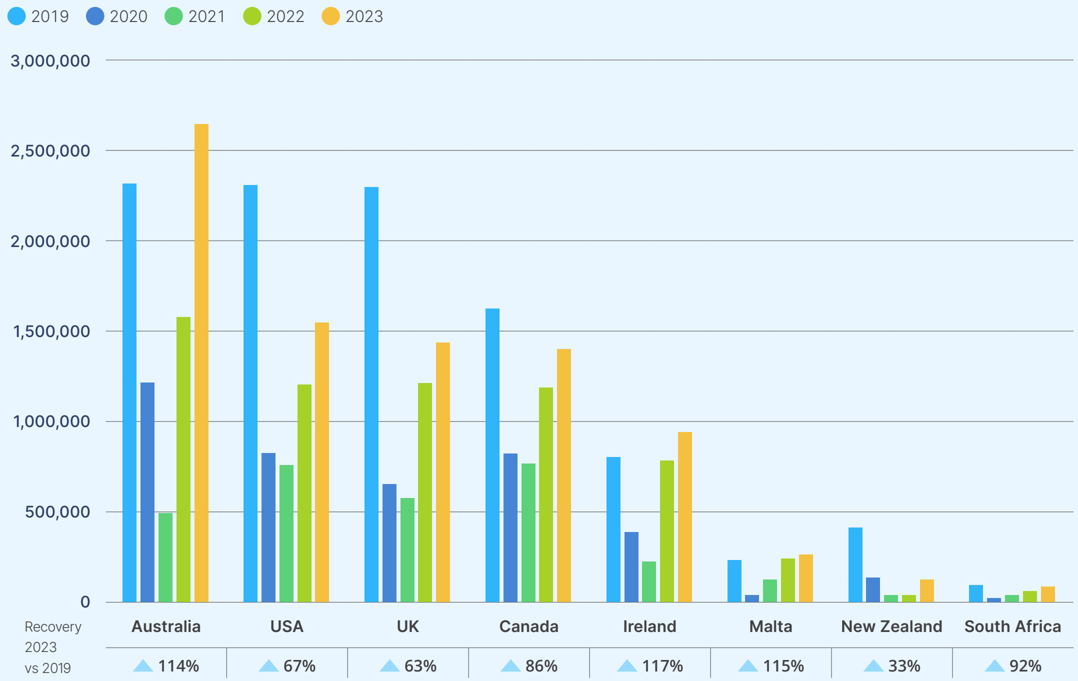
*"Ireland, Malta, and Australia benefited from being more affordable than other destinations and offering work rights for English language students. It can be argued that the combination of these factors with more seamless access to student visas played a key role in these destinations' road to full recovery in 2023."*

**Ivana Bartosik,**
International Education Director, BONARD

## Student numbers by destination (2019-2023)




## Student weeks by destination (2019-2023)




Source: BONARD, 2024; based on data from English Australia, English New Zealand, English South Africa, English UK, EnglishUSA, Institute of International Education, Languages Canada, English Education Ireland, National Statistics Office Malta

Despite a slower recovery, the UK has maintained its spot as the most popular ELT destination in the world in terms of student numbers by a large margin. Interestingly, the differences in student headcount among Australia, the USA, Canada, and Ireland, which stood out in the past, were marginal in 2023.

Australia reconfirmed its position as the leading destination by student weeks. This was thanks to strong growth from the LATAM region and the fact that adult students, who comprise the majority of Australia's student body, tend to enrol for long courses (on average, 15.7 weeks in 2023).

The UK, Ireland, and Malta, on the other hand, have traditionally been very popular destinations for junior students (under-18s). Juniors comprise over half of the English language student population in these destinations, and they have a considerably shorter average length of stay (3 weeks).

The number of junior students travelling abroad to study English has been consistently rising and is forecast to grow further in the next few years, including for other ELT destinations.

**In 2023, three destinations stood out as the top performers: Australia, Ireland and Malta.**

### AUSTRALIA

**Growing markets boost demand**

Australia was the fastest-growing destination in 2023 in terms of student weeks and the second-fastest for student numbers. It reached full recovery in student numbers and surpassed 2019 student weeks by 14%.

Student numbers from Colombia soared, growing by 137% between 2022 and 2023, and this played a part in fuelling Australia's growth. It is interesting to note that while Colombian students spent an average of 12 weeks studying English abroad (across all destinations), their average length of stay in Australia in 2023 was 22 weeks.

Although Australia had a successful 2023, providers noted that demand levels started to cool down in Q3 2023, and a subsequent increase in student visa refusals started to impact student recruitment. By Q4 2023, ELICOS providers faced significant challenges in recruiting students from Latin America, Thailand, Vietnam, Pakistan, and Türkiye.

## English language students by age group (student numbers)


Source: BONARD, 2024; based on data from English Australia, English UK, EnglishUSA, Languages Canada, English Education Ireland, National Statistics Office Malta

### CANADA

**The year of uncertainty**

English language centres in Canada faced a challenging year. After a solid rebound in 2022, growth slowed in 2023. Student numbers increased by 22% compared to 74% in 2022. Visa refusals and visa processing delays heavily impacted student recruitment. As a consequence of these challenges, students from several source markets shifted to other destinations (for example, students from Türkiye and Colombia opted for Australia).

While the market temporarily improved during the summer, announcements that regulations would change in the latter part of 2023 worsened recruitment prospects. Following the increase in funds (from CA$10,000 to CA$20,635) students must have to apply for a study permit and the announcement that an international student cap was imminent, the sector was plunged into uncertainty again.

### IRELAND

**Strong growth post-pandemic**

Ireland was the only destination country to surpass 2019 levels in both student weeks (+17%) and student numbers (+8%). With Brexit partly diverting EU student flows from the UK to alternative destinations, Ireland saw an increase in the number of junior students from European countries. In 2023, juniors made up half (51%) of the student population in Ireland.

The leading source countries for Ireland were Italy and Spain, followed by Brazil. Student numbers from East Asian countries such as Japan, South Korea, Taiwan, China, Malaysia, and Mongolia also grew significantly in 2023.

A particularly evident trend in the sector was the growing demand for short-term language programmes: the number of students in mini-stay groups (studying for less than two weeks) surged by 69% between 2022 and 2023.

## MALTA

### Ever more popular

Malta continued to benefit from its strong appeal and achieved a 94% recovery rate in student numbers and 115% in student weeks, recording a new all-time high student week volume.

While almost three in four students (74%) were from EU countries, Malta is also becoming more popular among non-EU students. Colombia, Brazil, and Japan emerged as the leading non-EU countries by student weeks.

Malta is still one of the most important destinations for junior students, with under-18s making up 51% of its international English language student population. In fact, following a year-on-year (y-o-y) 63% increase in the 15 and under cohort, this was once again the largest age group in Malta's ELT schools in 2023.

## NEW ZEALAND

### Behind the curve, but on a good trajectory

2023 was the first year of growth for the ELT sector in New Zealand. As the country reopened its borders after the Covid-19 pandemic later than all other destinations, student numbers and weeks continued to drop until 2022.

However, 2023 brought a fresh start, and student numbers and weeks soared by 223% in a year, allowing the sector to recover a third of its 2019 volume. The top source markets for New Zealand were Japan, Thailand, and China, accounting for 48% of all student weeks spent.

## SOUTH AFRICA

### Close to full recovery

English language centres in South Africa attracted 18% more students in 2023 than in 2022 and saw a 29% increase in student weeks. The country experienced strong growth from Middle Eastern and African markets, driven primarily by Saudi Arabia and Angola, both of which exceeded their pre-pandemic levels and emerged as top source markets for student weeks.

In contrast, Brazil, a traditionally strong market for South Africa, has not yet returned to its 2019 levels. However, the resumption of direct flights between Brazil and both Johannesburg and Cape Town in late 2023 has already led to an increase in Latin American student enrolment.

Reflecting trends seen in other destinations, the growth in student numbers and weeks slowed between 2022 and 2023. Nevertheless, the country's ELT sector is now on the brink of full recovery.

## UK

### Recovery is slow in the most popular ELT destination

In the UK, the recovery levels compared to 2019 were 67% for student numbers and 63% for student weeks. The recovery was driven predominantly by the private sector and the continuous rebound of junior students.

The UK ELT sector reached a record high proportion of junior students (under-18s), of 60%, in 2023, compared to under 50% in 2022 and 54% in 2019. The UK ELT sector has been particularly impacted by the situation in two key source countries: China and Russia. While student mobility is still recovering in China, it has almost collapsed in Russia. Moreover, while Italy ranked as the top source market for the sector, it only reached 67% of its 2019 student week volume. At the same time, new markets have emerged for the UK ELT sector, especially from the LATAM region, such as Colombia, Peru, and Mexico.

The ongoing effect of Brexit is also instrumental in the UK's slower recovery. It may take some time to reverse the effect of post-Brexit regulations in the UK and for the inflow of junior students to recover. English UK, the national association representing the UK ELT sector, is now pursuing a new approach, lobbying to establish bilateral agreements with individual countries for passport-free junior group travel.

## USA

### Visa denials and a strong US dollar hinder growth

In the USA, the sector's growth post-pandemic was significantly slower than in other destinations. The USA recovered 69% of its 2019 student numbers and 67% of student weeks.

Student visa denials are one of the main reasons that the US ELT sector experienced slower post-pandemic growth than other destinations. A growing proportion of students was also affected by the cost and sought more affordable destinations. In 2023, Taiwan was the fastest-growing market for the USA, with a triple-digit increase in student numbers. Other markets delivering growth included Brazil, Japan, China, and Italy.

SOURCE MARKET RANKING

# Growth is driven by emerging markets

BONARD's data, which provides a power ranking of the 90 largest source countries in the world, points to some important shifts in the global landscape.

In 2023, the top 10 source markets globally accounted for 61% of all student weeks spent abroad, a decrease from 67% in 2019. This shift reflected a changing landscape in the ELT sector, where growth in student mobility is increasingly driven by emerging markets.

One of the main factors influencing the overall sector performance is a delayed recovery in the top source markets.

Except for Colombia, the biggest markets globally have not yet reached full recovery. In some cases, this might be tied to a decline in actual student demand for English courses abroad in these traditional destinations.

On the other hand, we saw strong performance from mid-sized markets (Mexico, Vietnam, Chile, Türkiye, and Thailand).

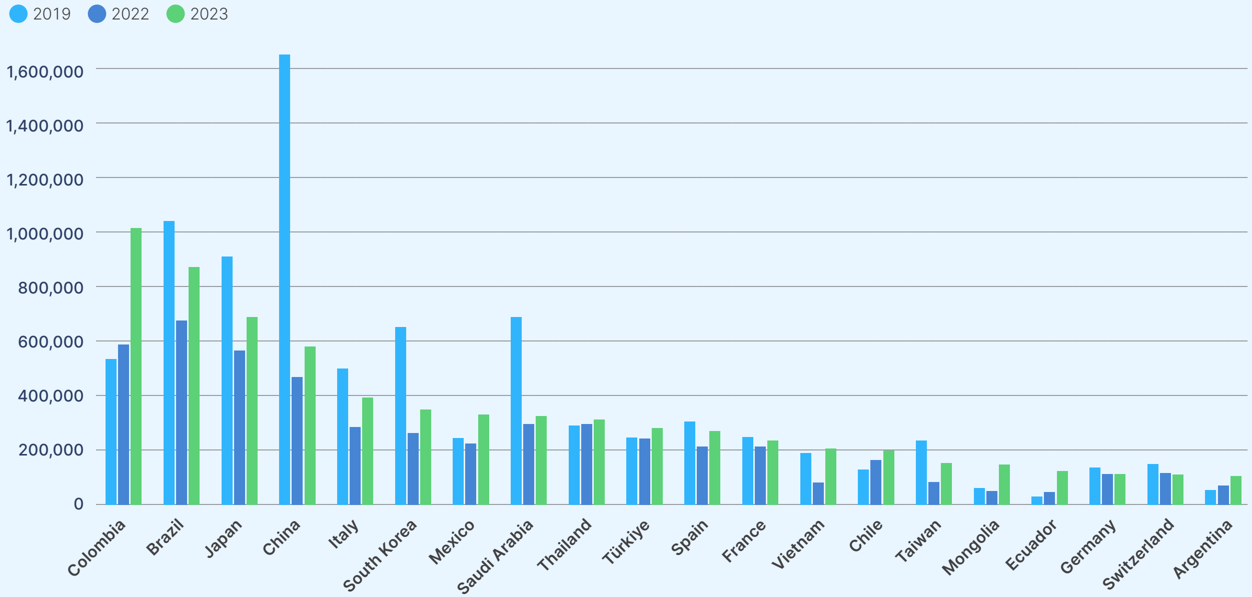
In 2023, Mongolia, Ecuador, and Argentina emerged as new entrants among the top 20 global markets, while Russia, India, and Kuwait dropped out of the ranking.

China was the longstanding leader in global ELT student mobility before the Covid-19 pandemic. However, in 2023, the country only generated 35% of its 2019 student week volume.

*"China reopened its borders in 2023, and this is a country where students plan their overseas studies well in advance. We will need to wait until next year to see China's full potential,"* explains Sarah Verkinova, BONARD's senior researcher.

*"From early Q1 2024 data, we can see that China is steadily recovering. If it follows the same pattern as other countries in Asia, we anticipate it will reach approximately 60% of its pre-pandemic sending volume in 2024 and then grow gradually after that."*

## Top 20 source markets in ELT (student weeks) and their recovery compared to 2019




Source: BONARD, 2024
Note: The figures represent the cumulative number of student weeks in the eight major destinations.

In 2023, demand was particularly strong from the LATAM region. Colombia stood out as the top source country for the sector globally, with a rapid growth in demand: in 2023, Colombia's student weeks were at 189% of the 2019 volume. Brazil also rebounded across all ELT destinations, reaching an 84% recovery compared to 2019.

A number of other LATAM markets outperformed their 2019 student week volumes. Mexico achieved a 45% y-o-y growth and reached a 135% recovery rate, becoming the seventh biggest market globally (up from twelfth in 2019). Other notable trends include student weeks from Ecuador quadrupling since 2019 and Argentina's student weeks almost doubling.

Asian markets provide a mixed recruitment outlook. Thailand and Vietnam have already exceeded their 2019 student week volumes, while Japan continued its gradual recovery (achieving 75% in 2023), balanced across key ELT destinations. Conversely, China and South Korea are significantly down in volume compared to the pre-pandemic picture.

Europe as a region offers limited growth. Italy, the sixth biggest market globally, achieved a 78% recovery rate in 2023. Spain and France performed better in terms of recovery (89% and 94%, respectively), while Germany was stable, and Switzerland experienced a downturn, indicating that student demand for ELT might be reaching its tipping point there.

MARKET OUTLOOK

# Changes brewing beneath the surface

The market performance in the first half of 2024 indicates that the sector is unlikely to surpass 2023 levels. Traditional destinations are expected to maintain the levels seen in 2023 or see a decline due to recent government policies.

The outlook for English language student mobility to the four largest English language destinations (the UK, the USA, Australia, and Canada) remains challenging, as visa restrictions and other damaging regulations are dampening demand.

This trend is evident in the available statistics (see the table below).

**Canada**

| ELT student numbers | |
|---|---|
| Q1 2023 vs Q1 2024 | Q2 2023 vs Q2 2024 |
| **-10%** | **-16%** |

**UK**

| ELT student weeks | |
|---|---|
| Q1 2023 vs Q1 2024 | Q2 2023 vs Q2 2024 |
| **-13%** | **-1%** |

**Australia**

| ELICOS student numbers |
|---|
| May 2023 vs May 2024 |
| **-32%** |

The ELICOS sector was affected by a significant drop in student visa grant rates for markets such as Colombia, Nepal, and Pakistan, which hampered international recruitment activities.

These developments will drive demand to Ireland, Malta, New Zealand, and South Africa. Moreover, a stronger language education provision in alternative destinations such as Dubai and intra-regional destinations – particularly within the Asia-Pacific region – is increasing competition and diverting students from traditional markets.

While there are some challenges on the horizon for traditional destinations, the junior market still offers stable recruitment opportunities. Demand from junior students is predicted to grow globally beyond 2024.

Summer schools, particularly for junior students, are recovering after the pandemic years. Parents appear more comfortable sending their children abroad again, which contributes to a gradual recovery in this age segment, albeit pre-pandemic levels have not yet been reached. Growth was particularly noticeable in the UK and the USA, where short-term and junior programmes rebounded in 2023. Demand for these programmes is strong from EU markets, China, and less traditional markets such as Colombia, Mexico, and Türkiye.

### Sector consolidation

Consolidation in the school market is expected to be a more visible phenomenon in the sector than in the past, driven by the need for efficiency, innovation, quality control, and improved financial performance.

Considering the sheer size of the supply (over 3,000 English language centres teaching English to international students in the eight destinations monitored by BONARD) and expected structural changes in demand, it is likely that the sector will adjust via an increased number of M&As as well as school closures.

Larger organisations are better positioned to innovate and manage resources efficiently, making them attractive in a competitive market. Investor interest is growing in acquiring multi-centre operations and year-round centres, further driving consolidation.

Similarly, a growing number of partnerships between universities and private English language providers is expected.

These partnerships are beneficial for universities, as they allow them to leverage a language provider's extensive partner network and recruitment capacity while eliminating the operational costs related to running a standalone language centre.

**Sector adaptations**

The ELT sector is navigating a challenging landscape shaped by increased competition, and in some destinations, regulations are inhibiting demand. We identified six key areas where adaptations could be implemented so the sector can mitigate the impacts of external factors and keep developing:

### Focus on product development and student services

Listening to market demands and creating attractive study programmes featuring attractive extras.

For under-18 students, these include English plus programmes for juniors, summer courses featuring subject content, study skills and internship opportunities designed to prepare students for future study and work, and programmes accommodating parents with young children.

In the adult segment, offering bespoke, experiential courses that promote unique local selling points will set programmes apart from online or other alternatives in a student's home country. Another example of courses that are growing in appeal is courses that focus on career and professional language development.

Leveraging the local context is crucial in this regard; partnerships between language education providers and local businesses should be forged and strengthened. Similarly crucial is the strategic targeting of source countries and sectors that would benefit from greater English language proficiency: IT, health and social care, hospitality, creative arts, and sports.

### Agile and efficient operations

As student numbers in major destinations are expected to contract, effective resource use is paramount. Providers will be looking to develop lean and agile systems to streamline operations. This includes carefully considering class size and leveraging technology to streamline tasks so that resources can be reallocated to other priority areas.

Providers are likely to be pushed for innovations in three key areas: implementing student management systems that simplify, streamline, and advance application; sales; and other centre operations, such as utilising digital marketing platforms that offer fast and efficient translations in multiple languages and leveraging messaging apps for marketing and outreach activities.

### Customer communication

Efforts will be made to achieve more impactful communication to mitigate the effect of two challenges affecting the sector: visa refusals and negative perceptions in specific source countries.

Pre-arrival communication with prospective students, in particular, should be enhanced to include visa application and interview preparation. This could reduce the likelihood of visa rejections and enhance the institution's reputation as a supportive partner.
Joint marketing and outreach activities in specific source countries, amplified by sector associations' messaging, will help institutions counter negative perceptions and reassure students.

### Push to improve data availability to inform future decisions

As the number of source markets driving growth for the traditional destinations is declining, more efficient use of data is needed to identify not only growth markets but also specific opportunities.

Granular data on student profiles and origin will quantify recruitment opportunities by precisely identifying target audiences down to specific profiles and geographical distribution within each country. Advancing data collection and reporting in English language teaching to bring it on par with other international education sectors, such as higher education, is also essential for advocacy efforts.

### Continued advocacy

Ongoing uncertainty affects all sector stakeholders, including providers, agents, and students. The sector must invest to lobby the government to ensure that regulations do not negatively impact the industry. Government support for initiatives like work experience and student exchange programmes is also seen as a vehicle to open new avenues for growth.

Communication channels with the government should be established or improved to ensure transparent and consistent information sharing. This is particularly important, and urgent, to address visa processing delays and refusals.

It is also important to continue lobbying for the language education sector to be recognised as an integral part of the international education sector. Ongoing public awareness campaigns showing the benefits the sector brings to national economies and local communities are particularly useful in this regard.

### Addressing accommodation shortages

Among the key challenges for the ELT sector are sourcing host families and building more purpose-built student accommodation (PBSA). While the general sentiment among sector stakeholders is that the number of host families is unlikely to return to pre-pandemic levels, PBSA development presents a feasible option to source more accommodation for international students.

Coordinated efforts need to be made to ensure that students have access to quality and affordable student accommodation. This can be achieved by facilitating an informed dialogue between the sector and government officials, investors, and developers.

Student housing has established itself as an attractive asset class for investors; however, investment opportunities in student housing for the English language sector need to be promoted and supported with advocacy activities and timely and transparent data.

The availability of good-quality, affordable student accommodation that reflects the needs of the sector (for example, fluctuating demand over the year) is now a fundamental factor determining the success of a study destination.

The demand for learning English abroad will persist, but education providers must remain agile and adaptable in an increasingly competitive and fast-changing environment. To stay relevant, they must quickly respond to shifting market dynamics, diversify their offerings, and, perhaps for the first time in a long while, actively promote the irreplaceable benefits of learning English in a native environment.

For more information contact us at education@bonard.com

www.bonardeducation.com

Main office
Museumstraße 3b/16,
1070 Vienna, Austria

Asia office
Ocean Int. 1805A, Xinkai Rd,
300011 Tianjin, China

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