

ELT in 2024: Global Pressures Reshape the Landscape

After a year of recovery in 2023, early expectations for the English Language Teaching (ELT) sector in 2024 pointed to continued growth following the post-pandemic rebound. However, the reality proved more complex. Several leading ELT study destinations, such as the UK, Canada, and Australia, implemented stricter immigration policies and caps on international student numbers.

At the same time, source markets faced a global economic slowdown, including inflation and currency depreciation, which curbed outbound mobility. Between 2023 and 2024, the combined pressures resulted in a 10% decline in student weeks and a 6% decrease in student numbers across the eight major destinations.

BONARD's international education experts have analysed the 2024 data across eight major destinations, reviewed early trends for 2025, and identified emerging markets that may reshape the future of the ELT landscape.









Student Mobility: Policy and Price Reshape Trends

BONARD's annual research into the global ELT sector is a well-established model covering eight key destinations – Australia, Canada, Ireland, Malta, New Zealand, South Africa the UK, and the USA – and has served as a comprehensive benchmark for sector performance for more than a decade.

In 2024, these destinations collectively hosted 1 million English language students, generating a total of 7.6 million student weeks. These figures encompass students of all ages and course types.

By 2024, the global ELT sector regained 73% of its 2019 student volume and 75% of student weeks compared to the pre-pandemic totals of 1.4 million students and 10 million student weeks. Only Ireland and Malta continued to surpass their 2019 student week levels.

For all other major ELT destinations, recovery stalled in 2024 due to changes in visa policies, affordability, and shifting student demand in language travel.

In 2024, ELT student mobility was increasingly shaped by two dominant factors: high visa refusal rates and affordability constraints. In key destinations like Canada, Australia, and the UK, stricter visa policies and rising application fees created setbacks in the student journey,"

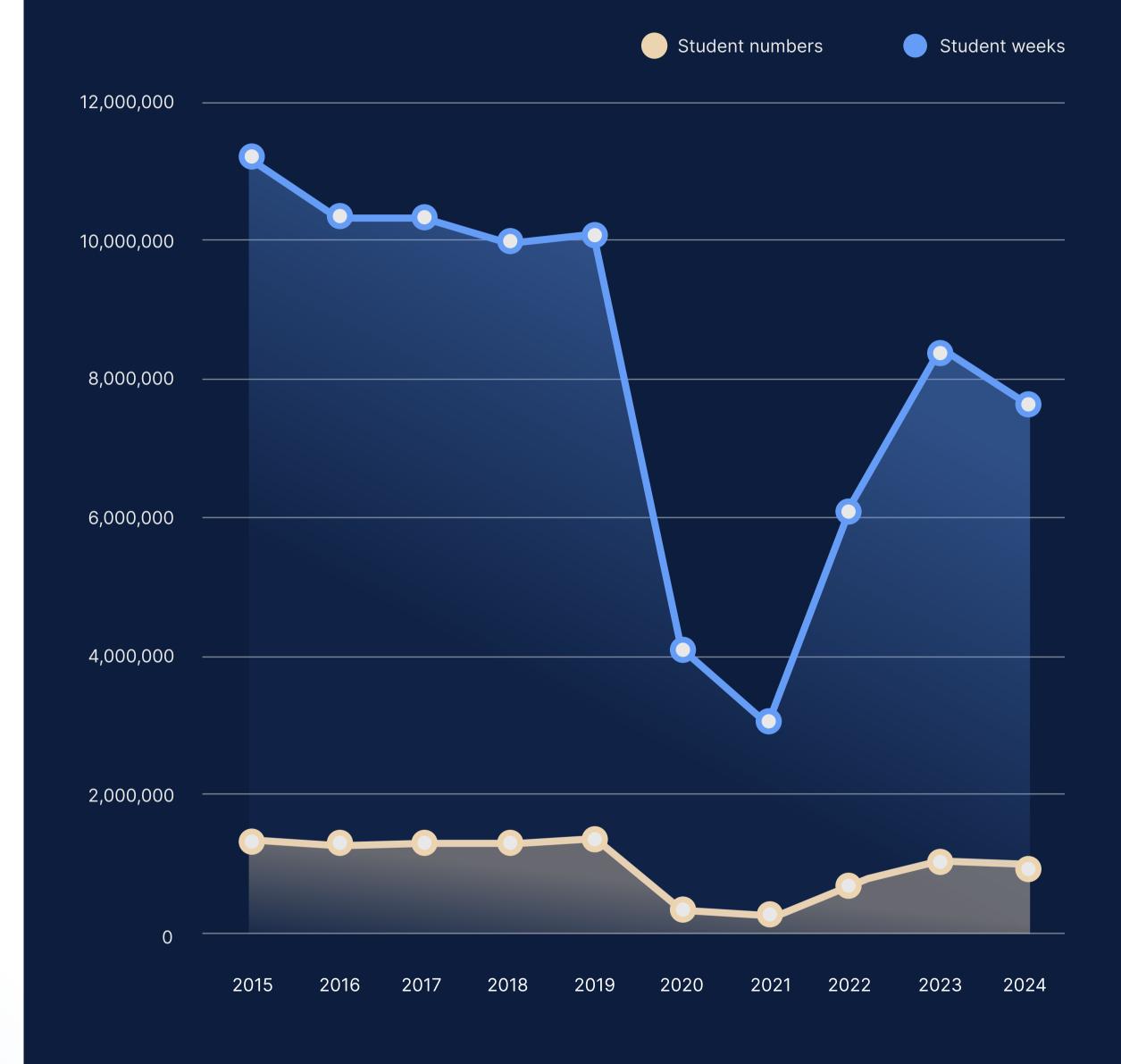
noted Sarah Verkinova, Head of International Education at BONARD.

"Consequently, alternative destinations gained popularity, and a minimum of 100,000 students enrolled in ELT courses in Dubai and the Philippines."



Sarah
Verkinova
Head of International
Education, BONARD

Total number of English language students and student weeks



Source: BONARD, 2025; 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 Overview: Ireland Leads in Recovery, Momentum Slips

Ireland surpassed its 2019 levels in both student numbers and student weeks, with Malta being the only other destination to exceed pre-pandemic student week figures. However, growth in both countries slowed in 2024, and early indicators for 2025 suggest a decline in student weeks.

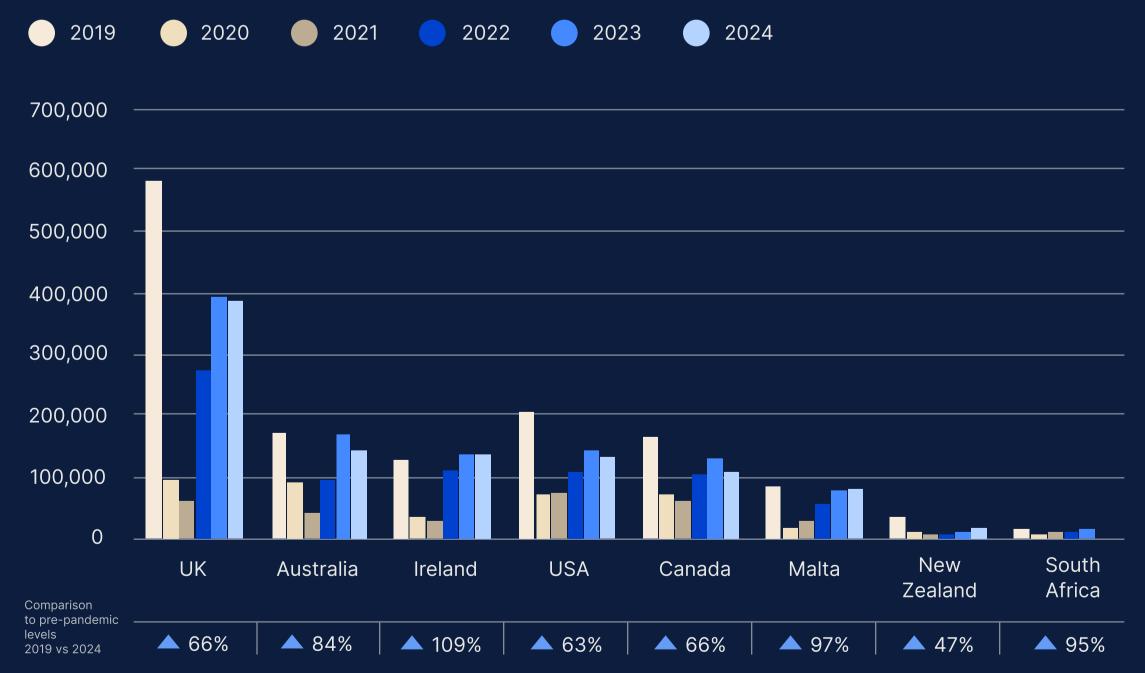
Ivana Bartosik, BONARD's International Education Director, commented:

"Ireland and Malta's visa-friendly policies and work opportunities have helped them attract students discouraged by stricter regulations, high course fees, and other expenses in other destinations.
This welcoming approach has enabled
them to remain more attractive than other
ELT destinations, with Ireland even
surpassing both the USA and Canada
in total student numbers."

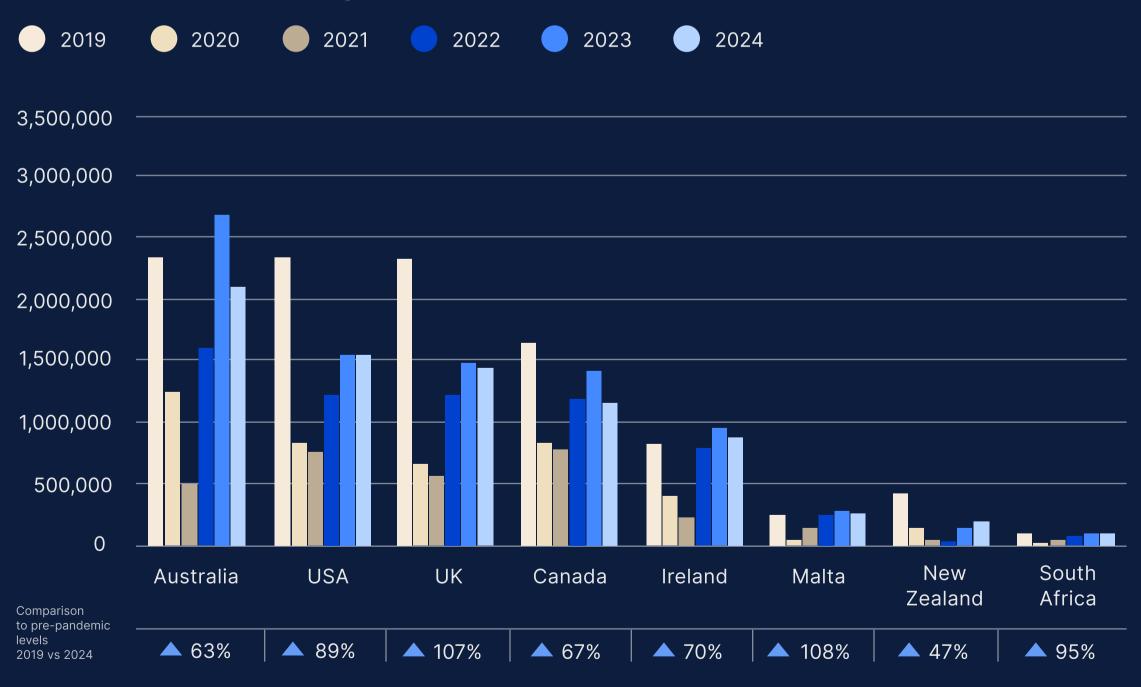


Ivana
Bartosik
International Education
Director, BONARD

Student numbers by destination (2019 - 2024)



Student weeks by destination (2019 - 2024)



Source: BONARD, 2025; 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







Destination Performance: Uneven Outcomes Across ELT Markets

Although the UK experienced declines in student numbers in 2024, it remained the most popular ELT destination, capturing 38% of the market share for the third consecutive year. This was largely driven by its ability to attract large numbers of junior students, resulting in the highest junior-to-adult ratio (62% to 38%) among all the ELT destinations.

Australia was the top-performing destination for the third consecutive year in terms of student weeks, despite high visa refusal rates in the ELT sector.

This was largely driven by students already residing in Australia and enrolling in English language courses, particularly students from Colombia. Nevertheless, between 2024 and 2025, Australian ELT sector saw private school closures due to declining enrolments linked to high visa fees.

The junior segment remained stable or slightly increased in 2024 compared to 2023. Juniors accounted for more than half of enrolments in traditional destinations like Ireland, Malta and the UK. The number of adult students stagnated in most destinations in 2024.



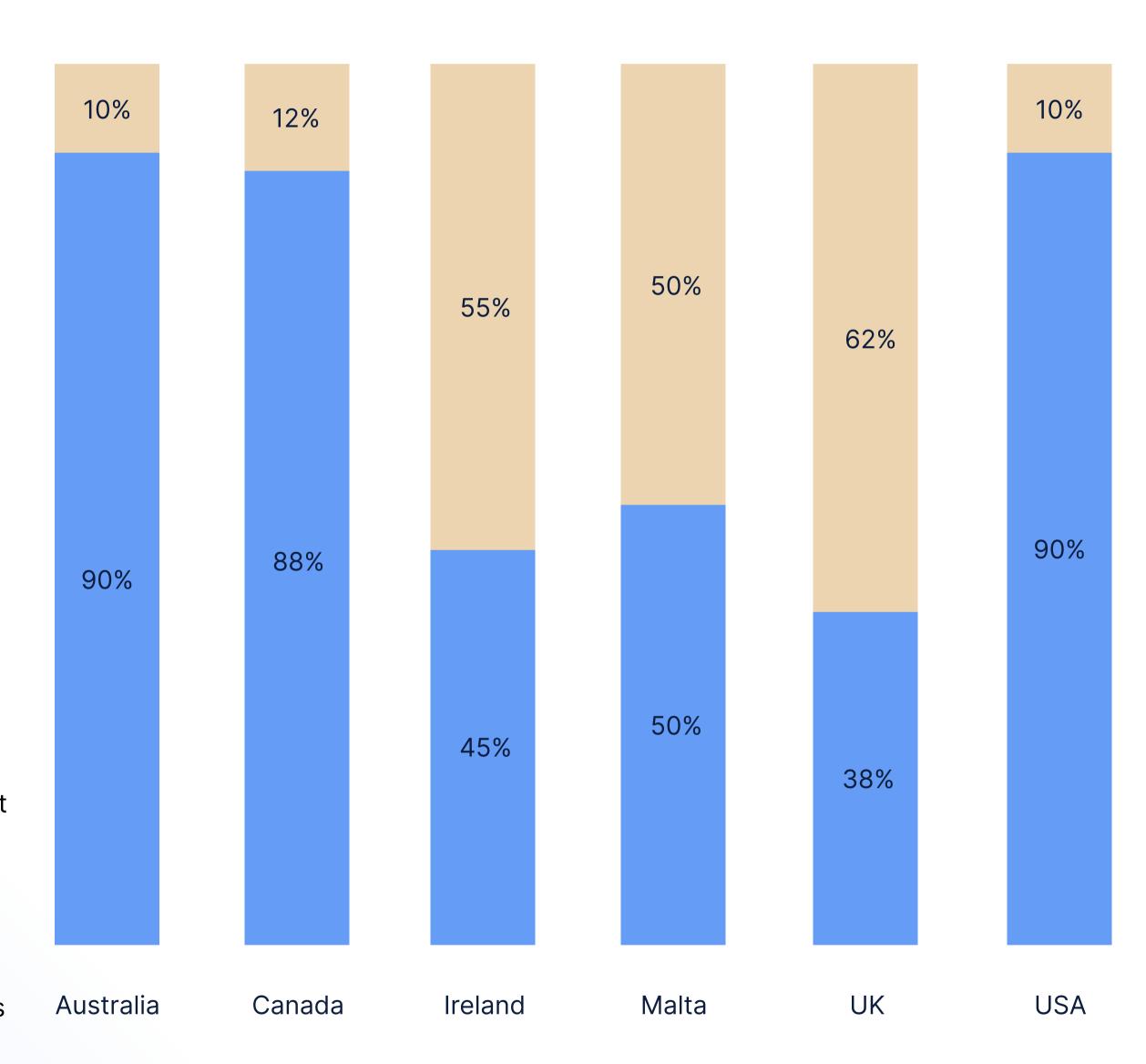
AUSTRALIAVisa barriers and regional competition

Australia experienced the steepest declines in 2024, with student weeks falling by 22% and student numbers dropping by 16%. In 2024, Australia reached 89% of the student weeks and 84% of the student volumes achieved in 2019. The slowdown in recovery is directly linked to the declines seen in 2024.

After three years, China reclaimed its position as Australia's top source market in terms of student numbers in 2024, overtaking Colombia. This increase in Chinese students was driven mainly by university-based ELT providers. However, Colombia remained the leader in student weeks, with Colombian students staying, on average, for 20.9 weeks, what is 6.3 weeks longer than the overall average ELT course duration in Australia.

English language students by age group (student numbers, 2024)





Source: BONARD, 2025; based on data from English Australia, English UK, EnglishUSA, Languages Canada, English Education Ireland, National Statistics Office Malta









CANADANumbers decline amid policy challenges

Canada's ELT sector continued its downward trajectory in 2024, with performance heavily impacted by government caps on international student numbers and significantly increased financial requirements for study permit applications.

As a result, the country reached 70% of its 2019 student weeks and 66% of student numbers. Both the public and private sectors experienced declines. In response to caps on study permits, more students began exploring alternative pathways into the country, leading to an 18% rise in Temporary Resident Visa (TRV) entries in 2024 compared to 2023.

Canada remained a particularly popular ELT study destination among Asian students, with Japan, South Korea, and China ranking as the top three source markets. Students from South America, notably Brazil, Mexico, and Colombia, also contributed significantly, accounting for almost a quarter of all student weeks delivered in 2024.



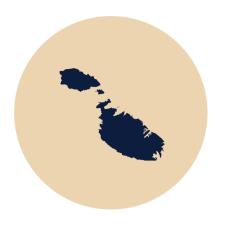
IRELAND Growth in volume, fall in duration

In 2024, Ireland was again the only destination recovering to 2019 levels in both student numbers (109%) and student weeks (107%). Compared to 2023, the student volumes were stable (+0.3%), while the total number of student weeks declined by 8%.

Juniors made up 55% of enrolments but only 16% of student weeks. Ireland's international student mobility policies remained welcoming in 2024, fostering stability in the ELT industry.

In Ireland, between 2023 and 2024, shorter-duration programmes, such as ministays, grew by 12%. This trend is expected to continue in 2025, resulting in strong student headcount but fewer total student weeks.

Italy remained the top student source market, followed by Spain and Brazil, though Brazil led in student weeks. Some markets, such as China and Morocco, showed notable growth, while others, like Bolivia and Spain, saw sharp declines.



MALTA Steady recovery

Malta's ELT sector saw a modest recovery in 2024, with international student numbers rising by 3.0% to 80,946, regaining 97% of pre-pandemic levels. However, total student weeks declined by 6%, and the average stay dropped to 3.2 weeks.

The steady recovery of the Maltese ELT industry can be attributed to strengthened relationships through MoUs, the organisation of fam trips for education agencies, and updated visa guidelines for industry stakeholders.

Italy declined across Malta and other ELT destinations, except for the US and New Zealand. France, Poland, and Brazil recorded strong growth in 2024. Colombia continued to lead in student weeks but recorded an 18% drop.

Juniors accounted for about half of all students, with growth across most youth age groups. The 50+ age group also grew significantly, up 19% year-on-year, pointing to an increasing interest in ELT from older learners.



NEW ZEALAND Slow recovery

New Zealand was the slowest recovering ELT study destination in 2024. The ELT sector reached 47% of its 2019 levels in both student numbers and student weeks.

Nevertheless, between 2023 and 2024, the sector outgrew all other ELT study destinations with 44% gains in both student numbers and student weeks.

This surge was supported by the country's welcoming stance towards international students and its comparatively friendly visa policies, which have facilitated entry and encouraged enrolments.

Japan, Thailand, and China remained the top source markets in 2024, collectively accounting for 53% of all student weeks spent in New Zealand. Each of these source markets saw growth between 2023 and 2024, with Japan seeing an impressive 43% growth. Thailand also posted double-digit gains, highlighting the importance of Asia as a long-term growth engine for New Zealand's ELT sector.









SOUTH AFRICA Modest growth, eyes on emerging markets

South Africa almost reached full recovery to 2019 levels in both student numbers (95%) and student weeks (95%). The sector saw growth of 1.5% in student volumes and 3% in student weeks between 2023 and 2024.

Saudi Arabia source market led in both student numbers and weeks, and Angola emerged as a standout growth market, more than doubling its figures year-on-year. There was also renewed interest from Brazil, buoyed by the return of direct flights to South Africa.

Despite these gains, the ELT sector in South Africa continues to face policy-related challenges, especially around study visa processes and recognition from South African authorities, and these issues have hindered full recovery.

Based on recent trends, South Africa is poised to benefit from increasing interest in emerging markets, including the Far East and European junior groups.



UKResilience during global challenges

In 2024, the UK's ELT sector reached 63% of its 2019 student numbers and 66% of student weeks.

The state sector continued to shrink, with declines of 8.9% in full-time student numbers and 14.5% in student weeks.

The private sector remained largely stable year-on-year, despite a drop in adult student numbers and weeks.

Even in 2024, the sector demonstrated stability despite shifts in source markets. China began to recover, though growth was limited to the junior segment.

Türkiye and Colombia contributed to overall student numbers, although Colombia is not expected to grow further in 2025 due to the revocation of visa-free entry.

Meanwhile, European source markets experienced declines, largely due to the rising cost of living, which has reduced parents' disposable income for such programmes.



USA

Slow recovery amid visa challenges and global competition

Similar to the UK, the US ELT sector remained at around 60% of pre-pandemic levels, having recovered 63% of student numbers and 67% of student weeks in 2024.

Student visa denials and lengthy processing times continue to impede the USA's growth in international student enrolments.

Additionally, safety concerns, geopolitical tensions, and strong international competition make it increasingly difficult for the US ELT sector to compete with both traditional and emerging study destinations. As a result, the US ELT sector is unlikely to recover to the levels of 2019 in coming years.

The top source market for the USA in 2024 was Japan, representing 15% of all enrolments despite an 8% decline from 2023. China, Brazil, and Colombia were the next largest source countries. Vietnam experienced a significant surge, with triple-digit growth driven by enrolments at private and university-governed providers.









Source Market Ranking: Brazil Leads Despite Declines

In 2024, the top 10 global source markets accounted for 63% of all student weeks abroad, up slightly from 61% in 2023 but still below the 67% recorded in 2019, showing a rising interest from non-traditional source markets.

Brazil became the largest global ELT source market in 2024, overtaking Colombia. While Brazilian numbers fell 14% year-on-year, Colombia declined by 28%, largely due to high visa fees and low approval rates in Australia. Despite this, Colombia remained one of only two countries in the top 10 to have fully recovered to 2019 levels, the other being Mexico.

Other South American markets surpassing their 2019 levels included Ecuador, Chile, Argentina, and Peru. Emerging markets like Mongolia and Nepal also continued to grow. Argentina entered the top 20 source markets.

China recorded the highest growth of any source market in 2024, rising 21% year-on-year as students carried out plans previously put on hold. This brought China to 43% of its 2019 volume, up from

35% in 2023. Nepal ranked as the second fastest-growing source market, followed by Saudi Arabia, reflecting renewed interest from the Gulf. Panama, Taiwan, and the UAE also posted strong gains.

"2024 may serve as the new benchmark year for China, as further rapid growth is unlikely. The increasing availability of local ELT options in countries like Malaysia and the Philippines, along with rising competition from in-country providers, is reshaping student preferences toward more cost-effective and accessible destinations,"

explains Kristina Benedikova, an International Education Consultant at BONARD.



Kristina
Benedikova
International Education
Consultant, BONARD

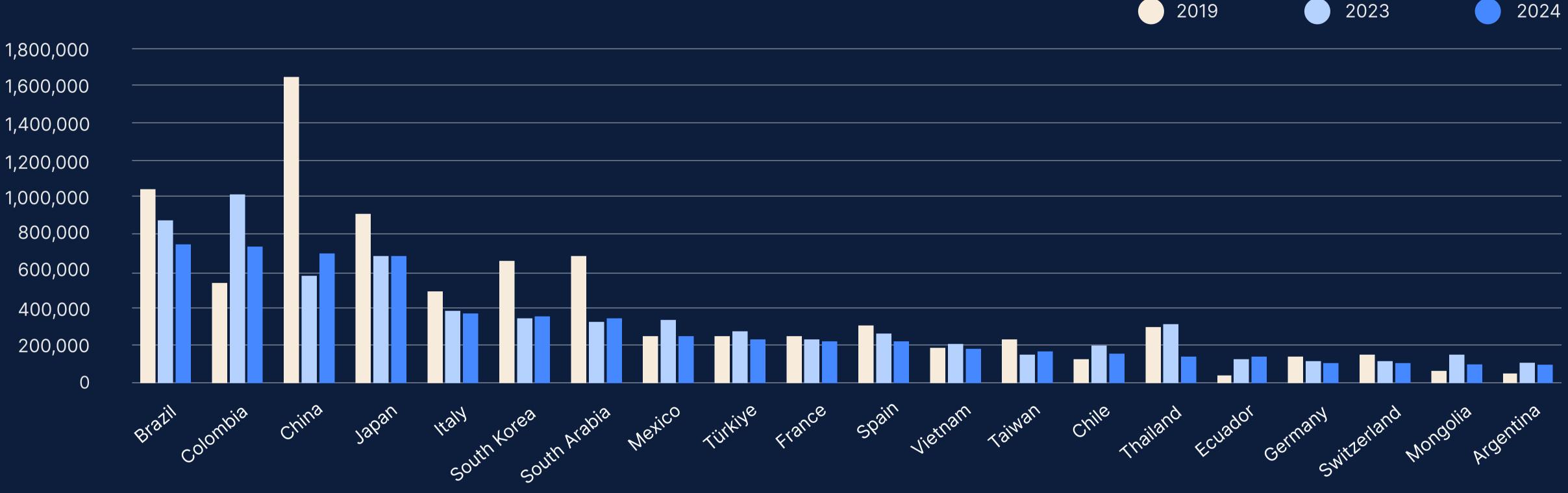








Top 20 source markets in ELT (students weeks) and their recovery compared to 2019



Source: BONARD, 2025

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

Nevertheless, in 2024, demand from Asia remained strong, led by China, Japan, and South Korea. Although these source markets have not yet returned to pre-pandemic levels, their large volumes kept Asia prominent in the global ELT landscape.

China was one of the key growth drivers, as its citizens resumed international study in 2024 following a prolonged pause after the pandemic. Taiwan also contributed to growth; however, much of this was driven by study tours, which are typically

shorter in duration. Meanwhile, Nepal emerged as a key growth market, particularly due to the prevalence of long-term study stays in destinations such as Australia, the USA, and New Zealand. Kazakhstan also stood out among emerging markets, growing 27% year-on-year.

Latin America showed mixed results. Major markets like Brazil, Colombia, Mexico, and Chile declined compared to 2023, while Ecuador, Venezuela, and Panama recorded strong growth.

Most major Latin American markets have surpassed 2019 levels, except Brazil. Compared to pre-pandemic figures, Ecuador surged by over 400%, while Peru grew by nearly 200%.

In Europe, all the major source markets declined year-on-year in 2024. The largest decline was seen in Spain, of 18%, as economic challenges impacted outbound mobility. Most European markets remained below 2019 levels. Other foreign languages saw increase in demand, particularly in languages such as Spanish.

This presents an opportunity for programmes that offer both English and additional language options.

The MENA region performed well, with Saudi Arabia, Oman, and the UAE growing by 6%, 11%, and 107%, respectively. However, only the UAE fully recovered to pre-pandemic levels, driven by increased government investment, scholarships, and a national push for English proficiency in workforce development.



Shifting Dynamics in ELT: Policy, Al, and Emerging Destinations Reshape 2025

In 2025, government interventions and economic conditions will continue to shape global ELT trends. Policy shifts, visa regulations, and financial pressures are expected to influence both student decision-making and destination performance.

Junior student mobility to the traditional "Big Four" countries is projected to decline further. Concerns around safety and perceptions of a less welcoming environment are discouraging parents and students from choosing these study destinations.

Additionally, AI will continue to disrupt the global ELT industry, as students increasingly turn to a growing range of tools to study English independently. In response, ELT providers must highlight the unique value of in-person learning, particularly the irreplaceable role of human connection and cultural immersion. Nevertheless, students from more price-sensitive markets may be more inclined to rely on AI as a cost-effective alternative, posing a challenge to traditional ELT models.

When it comes to new trends, there is growing demand for specialised ELT

offerings, including "English plus" programmes for juniors that combine language study with sports, arts, or vocational training. These formats appeal to students seeking more dynamic and practical learning experiences.

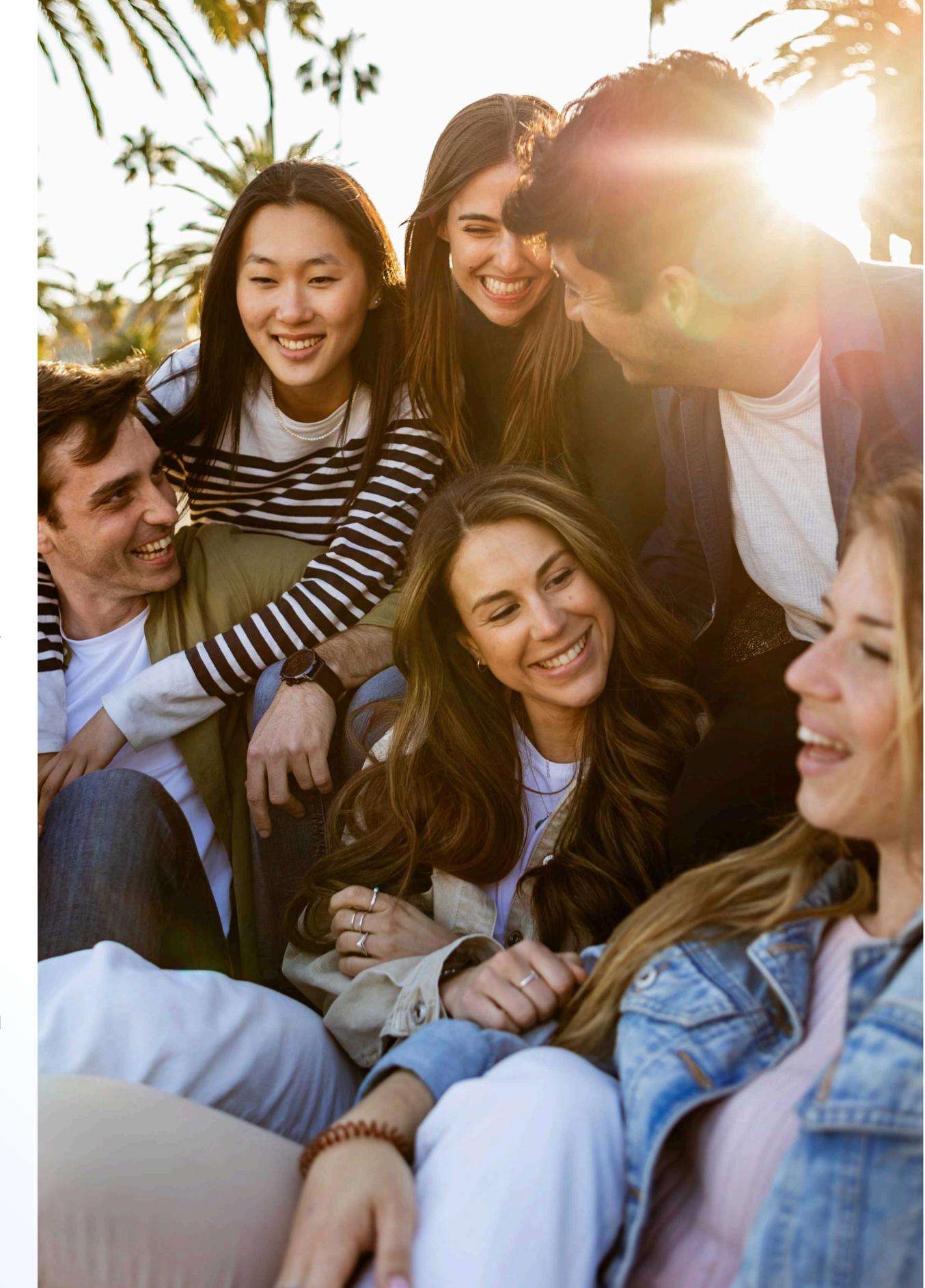
Destinations outside the traditional eight are gaining popularity, driven by affordability, innovative programme designs, and more favourable visa conditions. These markets are increasingly seen as viable alternatives to traditional study-abroad destinations.

In summary, 2025 is likely to bring another year of decline for the eight major ELT study destinations. The same combination of factors will continue to weigh on the sector: immigration and visa policies in several countries, persistent visa and affordability barriers, and a significant share of international students, particularly from China, choosing not to travel.

The ELT sector should prepare for a period of consolidation, focusing on strategic partnerships and using data more than ever to identify emerging source markets and track shifting student mobility patterns.







Evolving Market: **Dubai as an ELT Destination**



MARKET SIZE

Dubai as an ELT study destination is estimated to serve approximately 13,000 students annually. Given Dubai's population size, regional accessibility, and growing global appeal, there is considerable potential for growth. Once short-term visas are reinstated¹, the sector will be better positioned to accommodate a larger number of international students.



ខ្លួន) AGE GROUPS

Adults continue to dominate the ELT market in Dubai, accounting for approximately 95–98% of all ELT students. The junior segment, however, has seen a noticeable decline, largely due to rising competition.

Montserrat Taylor, Chief Executive Officer at ES Dubai commented:

"Despite these challenges, we are seeing a promising trend of greater diversity among junior students from new source markets, which hold strong growth potential once current visa challenges are resolved."



SOURCE MARKETS

The student market in Dubai has undergone noticeable shifts in 2025, with Türkiye emerging as the leading source market, followed by Russia, Colombia, and Brazil.

While Colombia held the top position in previous years, it has now been overtaken by Türkiye. Beyond the top four, other significant source markets include Ecuador, France, Thailand, Iran, China, Japan, and several Middle Eastern nations.

Russian students continue to play a key role, largely because they do not require visas to enter Dubai.

There is also growing diversity, with increasing numbers of students from Mexico, Slovakia, the Czechia, and Argentina, countries that previously had little presence in the ELT market.

In contrast, the number of Chinese junior students remains very low, largely due to the long-term nature of building agency partnerships in China and strong competition from established ELT study destinations such as the UK.

[1] Short-term visas were halted for selected nationalities in August 2024











The short-term ELT sector in Dubai is currently limited by restrictive visa policies, particularly for short-duration bookings. Despite this challenge, there is optimism that ELT student enrolments numbers will recover in the second half of 2025 as conditions begin to stabilise. In the long term, Dubai's ELT sector is expected to grow significantly over the next three to five years.

Furthermore, the expansion of the higher education sector in the UAE is expected to create positive spillover effects for ELT providers.

Compared to mature ELT destinations like Ireland or Malta, which have much smaller populations but far higher ELT enrolments - Dubai's current figures of around 13,000 students annually suggest considerable room for growth.

As awareness grows, particularly in the "work and study" category, Dubai is well-positioned to attract students seeking quality education, employment opportunities, and a safe international experience.



The destination saw a decline in both student numbers and weeks delivered in 2025 compared to 2024, with estimates indicating a 10% drop in student weeks.

A major factor causing the decline in student numbers was the cancellation of short-term student visas across the UAE in November. Authorities cancelled these visas due to misuse (illegal migration under the guise of student visas, especially from countries like Pakistan, India, Bangladesh, and the Philippines).

The UAE is now overhauling its immigration policy. At present, only long-term and tourist visas are available, leaving a gap for short-term study.

"This visa gap affects short-term ELT bookings, causing softness in the sector. The market awaits clarity on new visa policies, which will be critical to renewed growth,"

concluded Montserrat Taylor, from ES Dubai.

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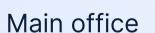
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