# Global ELT Annual Report 2026

BONARD
EDUCATION

# Global ELT Market:
# **A New Market Structure Emerges**

*At glance:*

↘ Student numbers

**-10%**

↘ Student weeks

**-23%**

ELT students

**901,877**

Average stay

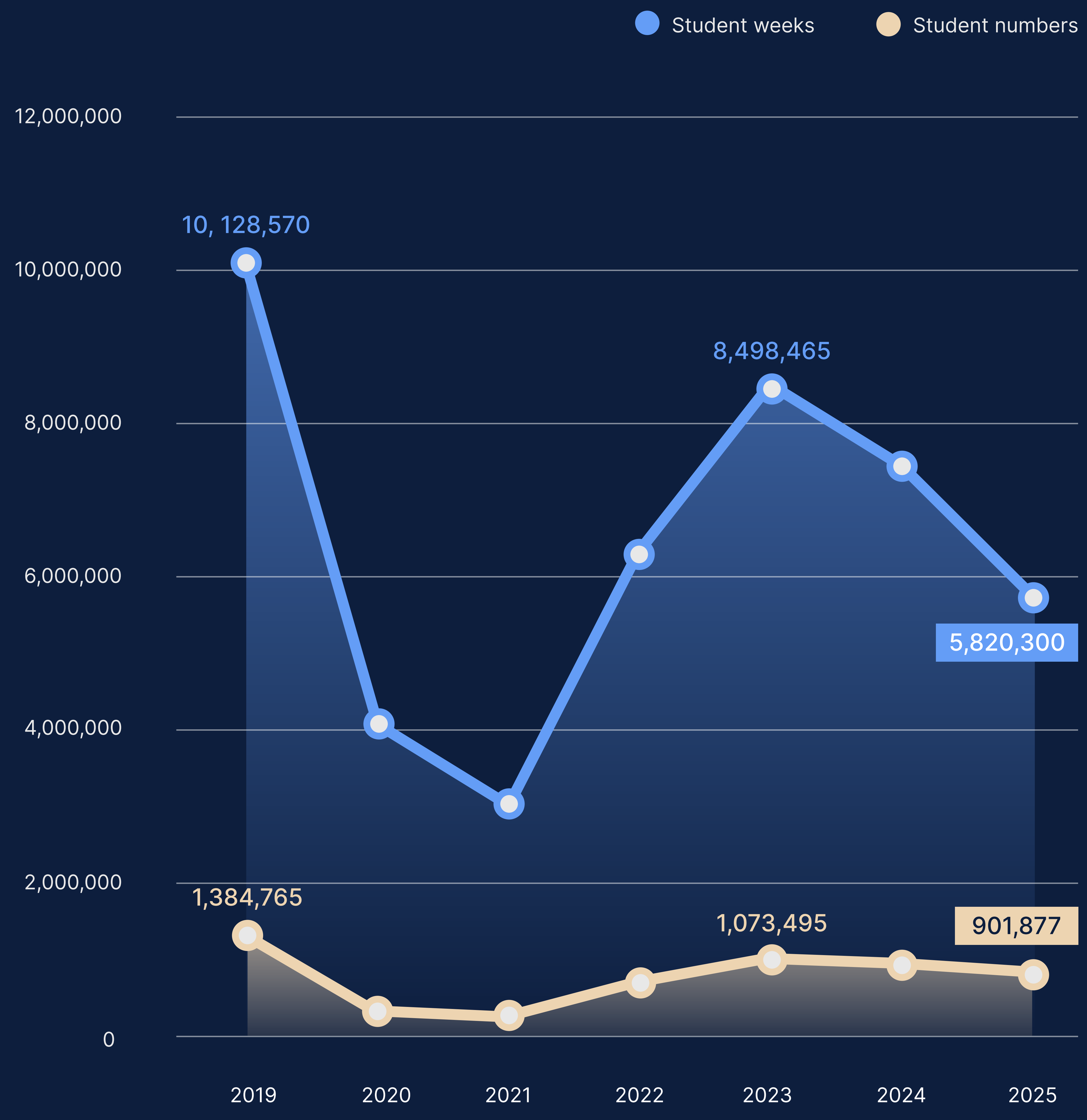
**6.5 weeks**

In 2025, the global English language teaching (ELT) sector experienced a second consecutive year of decline. Across the eight major destinations – Australia, Canada, Ireland, Malta, New Zealand, South Africa, the UK and the USA – **901,877 students generated 5,820,300 student weeks.**

Compared to 2024, **student numbers fell by 10%, while student weeks declined more sharply by 23%.** These declines follow decreases of 7% and 12% in 2024, marking a clear shift from the growth seen in 2023. The gap between student numbers and student weeks is significant. While fewer students are travelling, the steeper decline in student weeks points to changes in both the length and composition of ELT study. **Average length of stay fell from 8.3 weeks in 2022 and 7.9 weeks in 2023 to 6.5 weeks in 2025,** the lowest level recorded in the past decade. Fewer adult students, who typically enrol in longer programmes, are participating, while shorter programmes and the junior segment are gaining importance.

This shift first became evident in 2024, as government interventions increasingly influenced international student mobility. Adjustments to visa policies, student caps, higher financial requirements and other regulations particularly affected destinations reliant on longer-term adult students. In 2025, these impacts intensified and were further compounded by broader changes in student demand.

## Total number of English language students and student weeks




**Source:** English Australia, Languages Canada, English UK, EnglishUSA, English Education in Ireland, Education South Africa, Education New Zealand, National Statistics Office Malta & BONARD, 2025

**Note:** Global ELT overview covers 8 major ELT destinations: Australia, Canada, Ireland, Malta, New Zealand, South Africa, the UK, and the US

# Key Shifts:
# **What's Driving Change in the ELT Sector**

Affordability is now a key challenge for the sector. Tuition, accommodation, travel and living costs have risen in many destinations, while weaker economies and currency movements have reduced purchasing power in key source markets. For international education such as language study, these factors directly influence students' decisions to travel, their choice of destination and the duration of their stay.

Students also have more alternatives. English language provision in source countries is expanding, while alternative destinations compete through lower costs, regional accessibility and different programme offerings, including destinations such as Dubai, the Philippines and Malaysia.

These developments point to three structural shifts shaping the global ELT market: reduced adult mobility, growing affordability challenges, and increased competition from in-country provision and alternative destinations.

**The results from 2024 and 2025 show that ELT mobility has entered a new phase, rather than experiencing a temporary correction.** The sector should now focus on understanding changes in student profiles, programme duration, source markets and destination choices.

*At glance:*

↘ Affordability

**Rising costs**

Higher tuition, travel and living costs are reshaping student choices.

↘ Adult mobility

**In decline**

Fewer adult students are travelling, particularly for longer programmes.

Competition

**Intensifying**

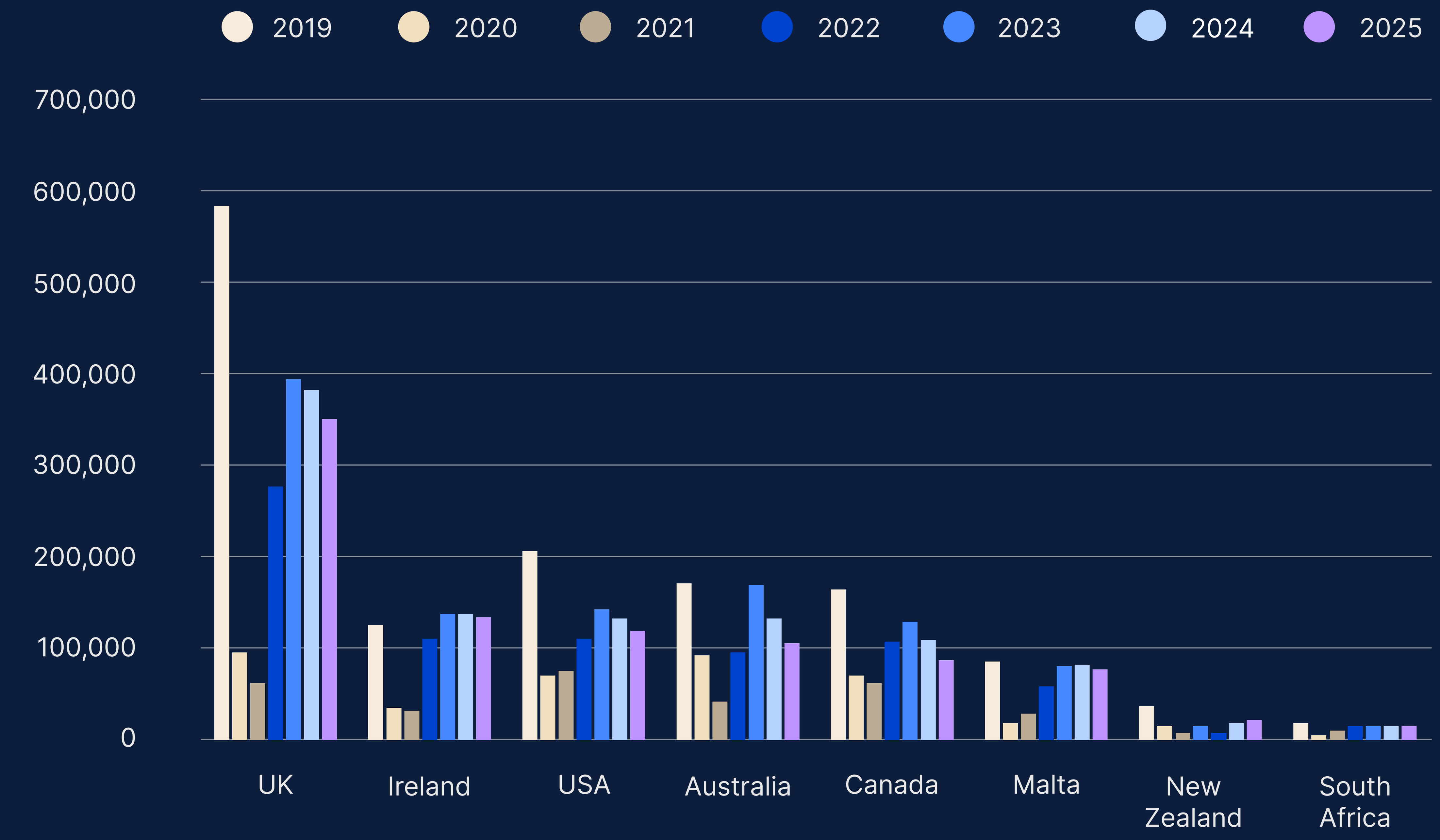
More in-country provision and alternative destinations are competing for students.

Demand patterns

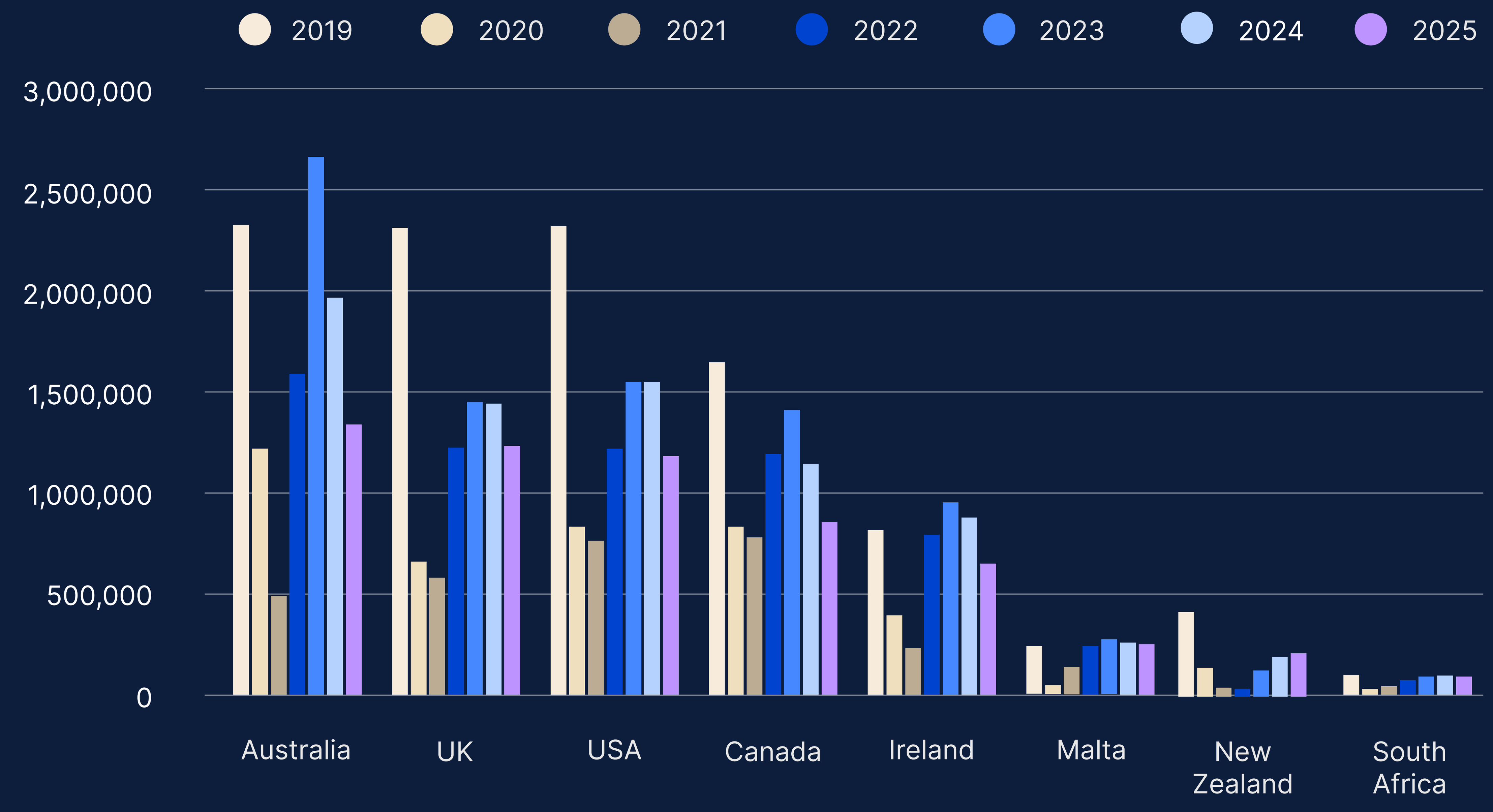
**Changing**

Source markets, programme duration and destination preferences are shifting.

## Student numbers by destination (2019 - 2025)




## Student weeks by destination (2019 - 2025)




**Source:** English Australia, Languages Canada, English UK, EnglishUSA, English Education in Ireland, Education South Africa, Education New Zealand, National Statistics Office Malta & BONARD, 2025

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# Destination Performance: **Student Weeks Continue to Decline**

Structural changes in the sector were especially evident in student weeks in 2025. However, performance varied by destination, indicating that the evolving global student mobility landscape presents both challenges and opportunities.

## AUSTRALIA

**Australia saw the steepest decline, welcoming 104,222 students in 2025, a 27% decrease year on year.** Student weeks dropped by 35% to 1,335,789, and average course duration fell from 14.6 to 12.8 weeks. This marks a significant reversal from 2023, when Australia generated 2.65 million student weeks.

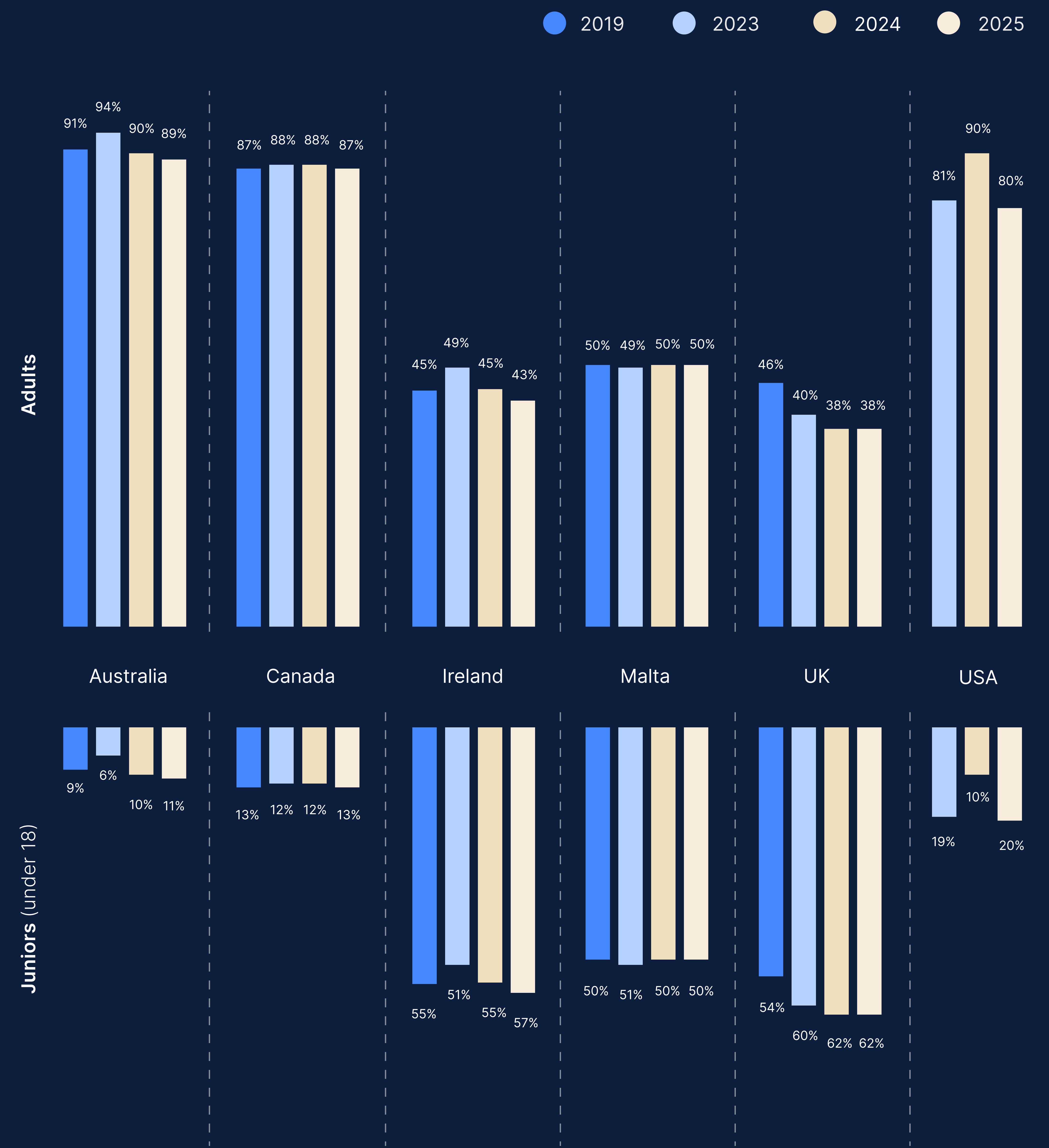
Government intervention was a key factor in this shift. Changes to visa policies, increased visa costs and stricter oversight of international student recruitment affected longer-duration demand. Affordability and evolving conditions in key source markets also contributed to Australia's decline, reflecting broader changes in international ELT mobility.

## CANADA

Canada also experienced a significant decline, continuing the downward trend from 2024. **Student numbers dropped by 12% and student weeks by 17%,** marking another challenging year for the Canadian ELT sector and international student mobility.

Study permit restrictions remained a major constraint, but providers adapted by using alternative entry routes. In 2025, only 13% of students entered on study permits, while 42% used an eTA and 21% a Temporary Resident Visa. These shifts highlight how providers are adapting to tighter immigration policies and changing conditions in the Canadian market.

## English language students by age group (student numbers Adults vs Juniors, 2025)




**Source:** English Australia, Languages Canada, English Education in Ireland, National Statistical Office, English UK, EnglishUSA, BONARD, 2025

## IRELAND

Ireland clearly illustrates the widening gap between student numbers and student weeks. **Student numbers declined by only 3%, while student weeks fell by 26% to 645,936.** In 2025, juniors made up 57% of students but accounted for just 20% of student weeks, with an average stay of 1.7 weeks. This shift in demand composition is resulting in significantly fewer study weeks.

## MALTA

Malta demonstrated resilience in a different way. **Student numbers declined by 6% to 76,003, but student weeks increased by 2% to 262,255,** supported by longer stays from long-haul source markets. Average length of stay increased to 3.4 weeks, with students from markets such as Colombia, Chile and South Korea staying considerably longer than the overall average.

## NEW ZEALAND

New Zealand achieved the strongest performance among the eight destinations, with both **student numbers and student weeks rising by 11%, reaching 18,636 students and 218,973 student weeks.** This continues New Zealand's upward trajectory as students increasingly consider alternatives to the largest traditional ELT markets.

## SOUTH AFRICA

South Africa also moved against the wider market trend, with **student numbers increasing by 3% to 14,775 and student weeks rising by 1% to 95,973 in 2025.** While both New Zealand and South Africa remain relatively small ELT destinations, their continued growth at a time when most major destinations are declining shows that they are benefiting from the reshaping of international student mobility.

## UNITED KINGDOM

**Among the major ELT destinations, the UK was the most resilient in 2025.** It remained the largest by student numbers, welcoming 351,991 students, an 8% decline, while student weeks fell by 14%. Despite these declines, the UK outperformed Australia and Canada, with shorter-duration and junior mobility helping to sustain student numbers amid the wider market decline.

## USA

**The USA reported declines of 14% in student numbers and 20% in student weeks in 2025.** The USA continued to benefit from an additional pool of students already residing in the country. In 2025, 26% of students were based in the USA when they enrolled, compared with 74% recruited internationally.

# Source Market Performance: **Changing Conditions Reshape Demand**

**In 2025, of the 30 largest source markets, 24 recorded a decline in student weeks between 2024 and 2025,** showing that weaker performance was not limited to a few countries but affected demand across much of the global ELT market.

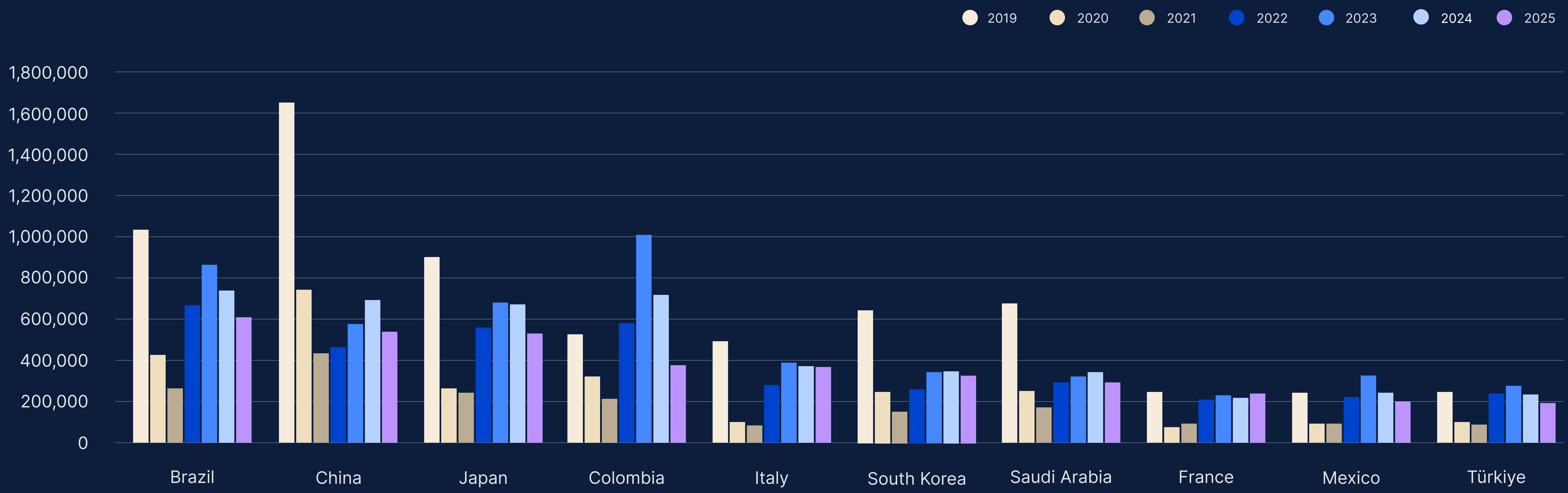
The factors behind these declines varied considerably. In most markets, weaker performance was linked to a combination of visa and access restrictions, affordability challenges and geopolitical uncertainty. In some cases, underlying demand for international ELT remained strong but students face greater barriers to travel. In others, the cost and perceived value of studying abroad were increasingly influencing whether students travel, where they go and how long they stay.

**Brazil remained the largest source market in 2025,** generating 614,982 student weeks, despite an 18% decline from 2024. Demand from Brazil remains significant, but the market has been especially affected by changes in visa and immigration settings in major destinations, alongside rising study and travel costs.

**China declined by 22% to 543,641 student weeks, reversing the growth recorded in 2024.** The Chinese market is also changing in composition, with junior mobility becoming increasingly important. As a result, destination safety, geopolitical stability and parental perceptions are more influential in study decisions. At the same time, families have more English language study options within China and elsewhere in Asia. These factors are supporting greater interest in local and regional alternatives, even though underlying demand for English language education remains strong.

**Japan and South Korea remained among the largest Asian source markets,** although both declined in 2025. Japan generated 537,918 student weeks, down 20%, while South Korea recorded 331,324 weeks, a more moderate decline of 6%. South Korea's relative resilience is notable given the broader decline in Asian outbound mobility. Affordability is also becoming more important, while students across major East Asian markets have access to well-developed domestic English provision and a growing range of closer, more affordable destinations in Asia.

## Top 10 source markets in ELT (students weeks) and their recovery compared to 2019




**Source:** English Australia, Languages Canada, English Education in Ireland, National Statistical Office, English New Zealand, English South Africa, English UK, EnglishUSA, BONARD, 2025

**Latin America recorded some of the sharpest declines.** Colombia saw the largest fall among the major source markets, with student weeks declining by 48% to 379,985, while Mexico declined by 16% to 208,408. Colombia had been one of the strongest contributors to the sector's growth in 2023, particularly through longer-duration study. Its subsequent decline, alongside weaker Brazilian and Mexican volumes, showed how exposed long-haul ELT mobility has became to changes in visa conditions, destination policies and affordability. Economic conditions and weaker currencies also reduced students' purchasing power across parts of the region.

**Europe was considerably more stable overall,** providing an important contrast to the declines seen across many long-haul source markets. Italy declined by only 2% to 370,912 student weeks, while France increased by 10% to 243,889 and Poland also recorded growth. Shorter travel distances and easier access to several major ELT destinations make shorter-duration study more viable for European students, even as students become more price-sensitive.

The Middle East added another layer of uncertainty. **Saudi Arabia remained one of the largest global source markets,** generating 300,320 student weeks in 2025, despite a 14% decline from 2024. While 2025 volumes remained significant, early indications for 2026 show a more challenging environment. Geopolitical instability across the region and disruption to travel are adding to existing affordability and visa considerations, creating greater uncertainty around future student mobility.

# Outlook:
# **Structural factors will continue to influence ELT mobility**

The global ELT sector is likely to remain under pressure in 2026. **Following two consecutive years of decline, there are currently few indications of a return to growth.** Another year of decline across the eight major ELT destinations is likely, although performance will continue to vary considerably by destination.

The structural factors that shaped performance over the past two years remain firmly in place. Government policy will continue to influence access to major destinations, while **affordability will remain a key consideration for students** deciding whether to travel, where to study and how long to stay.

**Student weeks are likely to continue declining faster than student numbers.** The growing importance of shorter programmes and junior mobility means that destinations may continue to attract significant numbers of students without generating the same volume of study weeks. **Adult mobility, particularly for longer-duration programmes, is unlikely to return quickly to previous levels.**

The growing junior segment nevertheless creates opportunities for providers. Specialised and English-plus programmes combining language study with sports, arts, academic preparation and other activities are increasingly relevant. At the same time, a younger student profile places greater emphasis on safety, accessibility and overall value, with parents playing a more important role in destination choice.

Competition for internationally mobile students will also continue to broaden. **Growth in New Zealand and South Africa in 2025** shows that the reshaping of mobility can benefit destinations offering different combinations of affordability, accessibility and student experience. Malta's increase in student weeks despite lower student numbers provides another example of how individual destinations can perform differently from the wider market.

**Destinations beyond the traditional eight will add further competition.** The Philippines, Malaysia and the UAE are strengthening their position, while improved English language provision in source countries gives students more opportunities to study locally. The traditional ELT destinations will therefore increasingly need to demonstrate the additional value of travelling abroad for language study.

Source market performance will remain volatile. **The decline among the largest source markets in 2025** shows how widespread the weakening of international mobility has become, but significant differences between destinations confirm that opportunities remain. Rather than relying on a small number of traditional growth markets, providers will need to identify specific combinations of source market, student segment and programme type where demand remains resilient.

Geopolitical developments add further uncertainty. The Middle East is particularly important in this respect: Saudi Arabia remained a major source market in 2025, while early developments in 2026 point to a more challenging environment. More broadly, geopolitical instability can influence connectivity, perceptions of safety and families' willingness to send younger students abroad.

The outlook for 2026 is therefore not uniform across destinations or student segments. While another overall decline is likely, changing mobility patterns will continue to create opportunities for destinations and providers able to respond to demand for shorter, more affordable, accessible and differentiated study experiences.

**For ELT providers, success in 2026 and 2027 will increasingly depend on adapting to where demand is moving.**

*At glance:*

Source Markets

**24 of 30**

Top source markets declined in 2025, showing widespread weakening across international student mobility.

Market Pressure

**Year 3**

2026 is expected to be the third consecutive year of overall ELT sector decline across major destinations.

# China's Junior ELT Market:
# **Key Trends and Outlook**

China remains a leading ELT source market, but both the scale and composition of demand are shifting.
In 2025, Chinese students generated 543,641 student weeks across the eight major ELT destinations, a 22% decrease from 2024.

Agent feedback reflects mixed market conditions, with some reporting moderate activity or softening demand, while others note stable or growing interest. Junior study tours combining English learning with activities remain the strongest-performing ELT product category.
This shift is significant. Growth in junior programmes does not offset the volume once generated by longer-duration adult students.

China should now be seen as a smaller, increasingly junior-driven outbound ELT market, rather than one reverting to its previous structure. Demand persists, but providers are competing for a different student profile and lower overall volume.

CHINA MARKET AT GLANCE

**543,641**

**STUDENT WEEKS IN 2025**
↓ −22% year-on-year

The overall volume across all eight major ELT destinations contracted significantly, underscoring a structural transition toward shorter-duration junior study tours.

# China's Junior ELT Market: **What Chinese Families Want Now**

**Chinese families have become much more selective.** Price and overall cost are top priorities, alongside teaching quality, school reputation and international recognition. With greater access to information, families increasingly compare the full value proposition rather than choosing programmes based mainly on destination or brand.

This is especially relevant for junior programmes, where parents make most decisions. **Programme quality, supervision, safety, accommodation, activities and educational value all influence choices.** Rising programme and travel costs put pressure on traditional destinations, particularly as families compare them with credible alternatives closer to home.

The UK remains a leading destination, with the USA and Australia also attracting interest. However, Asian destinations are gaining relevance. Singapore, Malaysia and Hong Kong offer closer proximity, lower overall costs and easier travel, increasing competition for traditional long-haul destinations, particularly for shorter junior programmes.

**Safety and geopolitical considerations are also influencing destination preferences.** As junior mobility grows, parental perceptions become more important. Political uncertainty, international tensions or concerns about safety can reduce families' willingness to send younger children long distances, making regional options more attractive.

Product differentiation presents another challenge. Many junior programmes continue to offer similar combinations of language classes, sightseeing and activities. **As families become more experienced and price-conscious, providers need to demonstrate more clearly what students will learn, what distinguishes the experience and why it justifies the cost.**

# From Product to Service & Value

Competition is therefore shifting beyond the programme itself. Agents increasingly highlight service quality, communication and trust as key differentiators. Parents expect clear communication before departure, strong safeguarding and supervision, reliable support during the programme and evidence of educational outcomes.

The provider-agent relationship is equally important. Agents need confidence that problems will be addressed quickly and that the experience delivered will match what was promised. Competing mainly on itinerary, destination or school brand is therefore becoming less effective. Value increasingly depends on the overall experience, including educational content, service, safety, communication and price.

Motivations for participation are also broadening. While academic progression and future overseas study remain important, families increasingly value practical English, confidence and early international exposure. Programmes that combine language learning with meaningful academic, cultural or skills-based experiences are therefore becoming more relevant than language classes alone.

1. SERVICE

**Service is the new differentiator**

service quality, communication and trust are increasingly shaping how programmes are evaluated.

2. EXPERIENCE

**Value goes beyond the programme**

educational content, safety, support and communication all contribute to the overall experience.

3. MOTIVATION

**Learning meets meaningful experiences**

families increasingly value practical english, confidence and early international exposure alongside academic progression.

# Outlook:
# Opportunities Within a Smaller, More Diverse Market

**The outlook for China's outbound ELT market remains cautious.**

**Junior mobility is likely to remain the strongest opportunity,** particularly during summer and winter holidays. However, agent feedback shows that the market is broader than juniors alone. While around half of surveyed agencies identified junior programmes as the strongest segment, **30-40% also pointed to General English, exam preparationand Academic English,** indicating continued demand across more traditional ELT products. A further 11% identified senior study tours, suggesting a smallbut potentially developing niche beyond the traditional student profile.

This diversification is important because **growth in junior programmes should not be interpreted as a return to previous overall market volumes.** Within the junior segment, programmes connected to future international education pathways are likely to have a particularly strong proposition. **Academic preparation, university exposure, STEM or other subject content, eadership development and measurable English-language outcomes can provide parents with a clearer justification for investing in an overseas programme than a general study tour.**

Opportunities are also becoming more geographically and demographically segmented. Tier-2 and tier-3 cities can provide additional demand as international education aspirations extend beyond China's largest cities, although families may be more sensitive to overall programme cost and value. At the other end of the age spectrum, the emergence of senior study tours points to opportunities for experience-led language programmes targeting older learners, although this remains a relatively small segment.

**Regional competition is likely to intensify.** Hong Kong, Singapore and Malaysia, alongside improved domestic options, offer families choices that require less travel and can reduce the overall cost of participation. Traditional destinations will increasingly need to justify the additional expense of long-haul study through distinctive experiences and clear educational value.

Geopolitical developments remain an important uncertainty, particularly for the junior segment, where parents make the final decision. Safety perceptions, connectivity and the wider relationship between China and individual destinations can influence demand quickly and may further favour destinations perceived as closer, safer or easier to access.

Overall, China remains a key ELT source market, but it is no longer defined by volume growth or by a single type of student. Juniors represent the clearest area of opportunity, while General English, exam and academic programmes continue to generate demand and new niches are emerging. **Providers that perform well will need to identify the segments that fit their offer, demonstrate clear educational outcomes, differentiate their programmes and provide a compelling reason for Chinese students and families to invest in an overseas experience.**

*At glance:*

↘ Student Weeks

**-22%**

The decline in total student weeks in 2025 highlights a slow recovery for long-duration mobility.

Traditional ELT

**30 - 40%**

Of agents continue to report steady demand for General, Academic, and Exam preparation courses.

Senior Tours

**11%**

An emerging niche pointing to new opportunities in experience-led programmes for older learners.

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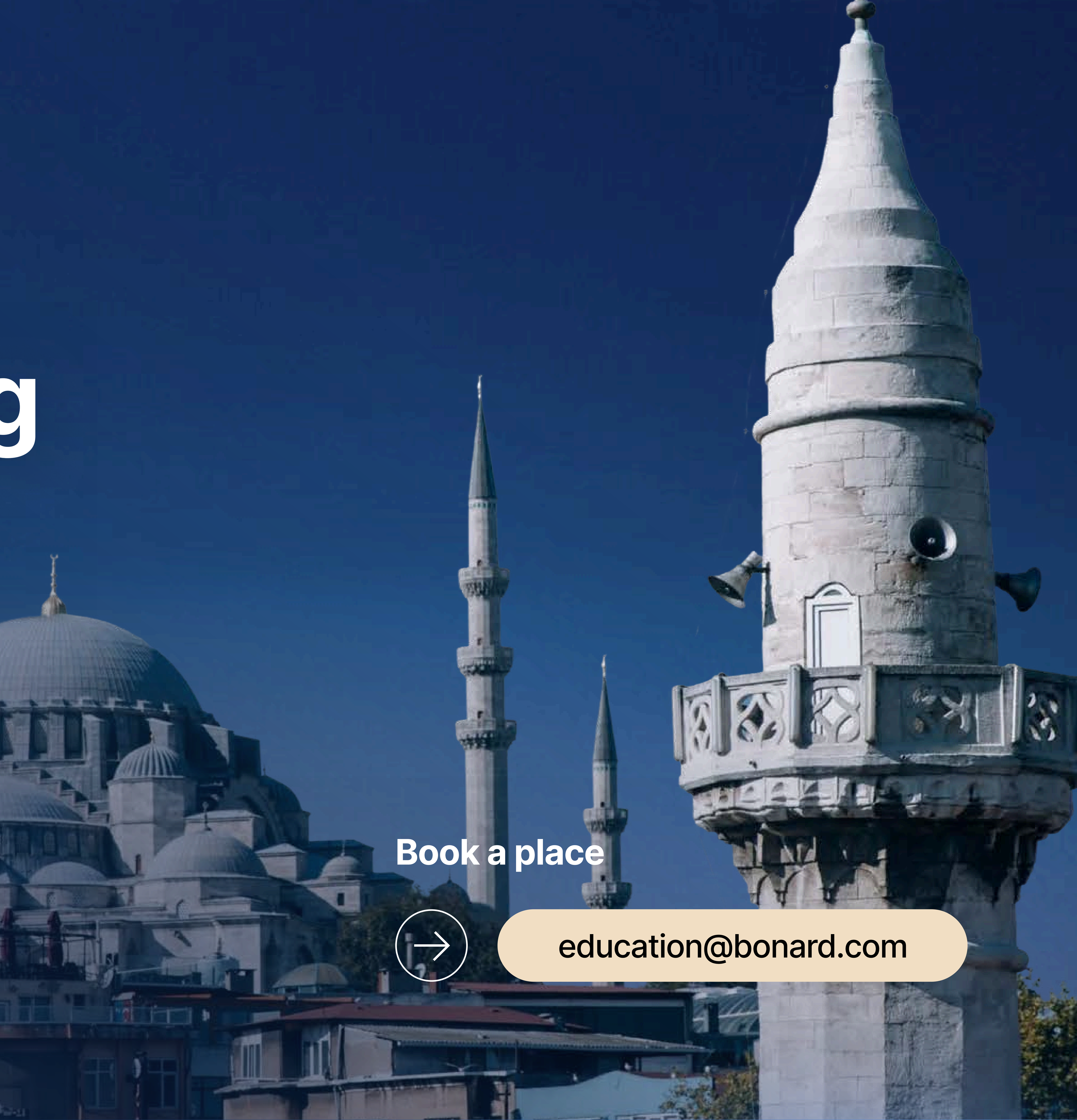
# Türkiye 2027

# Language Teaching Trade Mission



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