Trends Shaping the Future of Global English Language Teaching

Uneven recovery across destinations in 2023 continues as the English Language Teaching (ELT) sector emerges from the pandemic crisis and new trends appear. BONARD's international education experts have examined the sector's performance in 2022 and preliminary data for 2023 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.

Based on the year-to-date information available, **BONARD estimates that the sector will reach 90%–95% of its 2019 market volume in 2023.** This figure aligns closely with the company's initial prediction of a gradual market recovery.

The final picture for 2023 will inevitably be tied to key developments in 2022 and their lingering implications. Looking back at the now seemingly distant past, 2022 brought mixed recovery.

The return to English language student mobility was built around three main challenges: **capacity issues** (teachers, accommodation, flights, and visa application workload), ongoing **restrictions** in key markets, and **increased costs**.

Destination benchmark: An obstacle race with mixed results

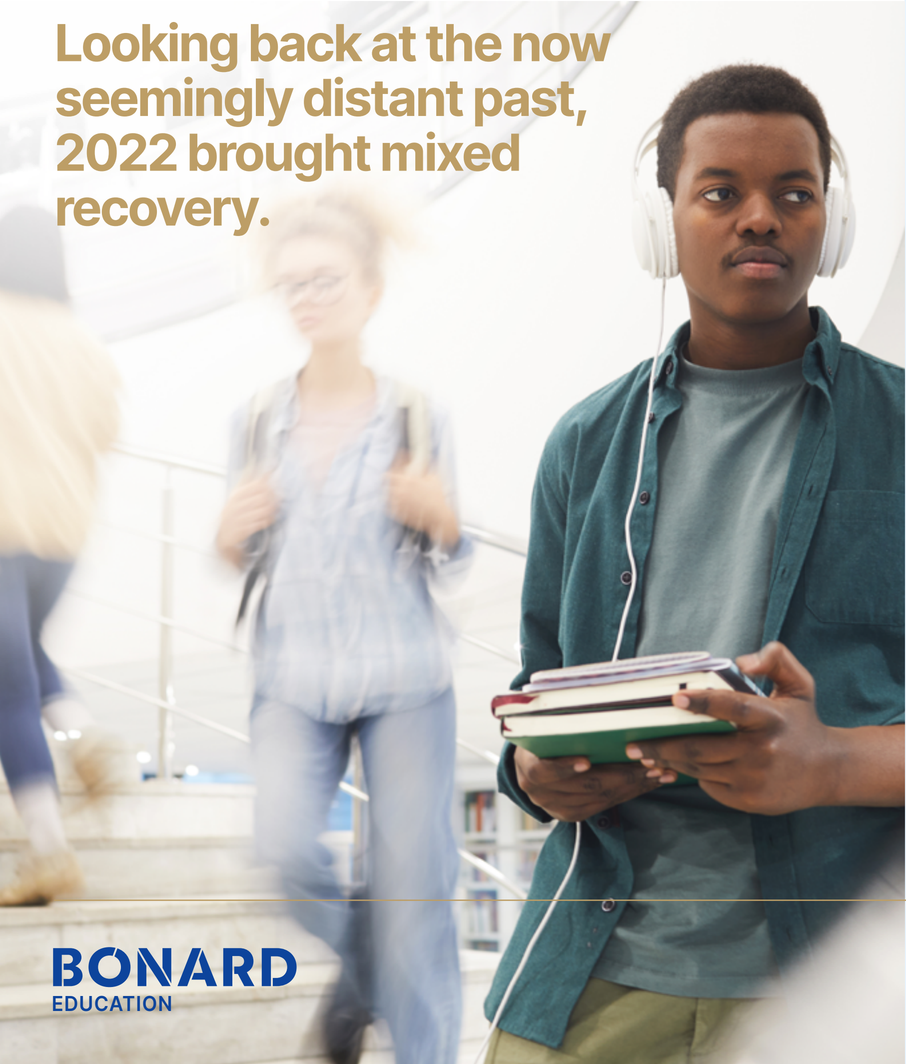
In 2022, the sector recovered 63% of its pre-pandemic student week volume and 55% of its student numbers. However, it is important to note that the recovery varied across different destinations.

Australia recorded the highest volume of student weeks. It enjoyed a robust Q4 2022 performance, when it also benefited from increased market share.

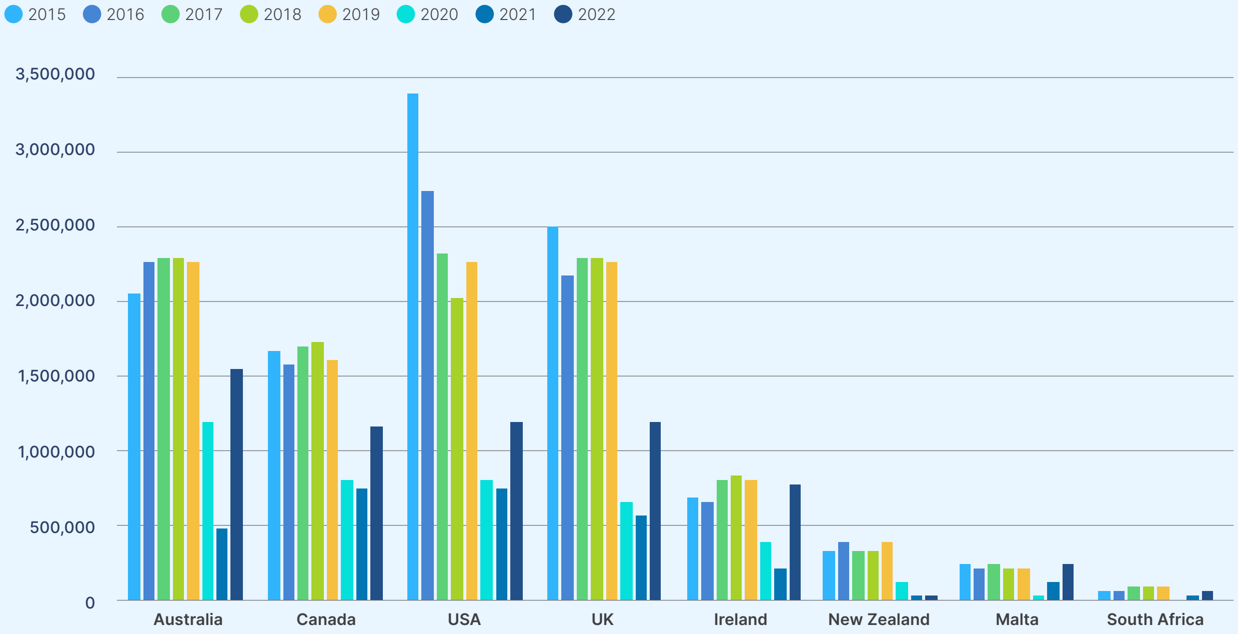
While Canada was the best-performing study destination in 2021, when it accounted for the largest number of student weeks spent, complications with visa processing in the second half of the year hampered further recovery in 2022. Visa processing times and grant rates are key factors that will determine Canada's standing in 2023.

The UK also recorded an impresive increase in the number of student weeks between 2021 and 2022, but it still has a long way to go to reach its 2019 market volume. With a limited recovery from some of its key source markets and Brexit redirecting some students to other ELT destinations, the country reached 53% of its pre-pandemic figures.

Looking back at the now seemingly distant past, 2022 brought mixed recovery.



Student weeks by destination (2015 – 2022)



SOURCE: BONARD, 2023; EduSA, English Australia, English New Zealand, English UK, EnglishUSA, Institute of International Education, Languages Canada, Marketing English in Ireland, National Statistics Office Malta

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

The USA recovered more slowly than its key competitors in 2022, achieving 52% of its pre-pandemic volume. It had seen a decline in the number of international students learning English before 2019 and factors such as long visa processing times and visa denials are hampering a quicker rebound.

Conversely, Malta and Ireland enjoyed a strong rebound in 2022. In fact, Malta was the only destination to outperform its 2019 levels, and Ireland came very close to achieving the same milestone (recording a 97% recovery).

Source markets ranking: LATAM is going strong, while Asia is recovering slowly

Dr Ivana Bartosik, BONARD's International Education Director, explains that:

"The global sector is reconfiguring, with markets in LATAM growing fast and other traditionally strong source countries which the sector relied upon – such as China and Italy, for example – being slower than expected in their recovery."

Ivana Bartosik,
International Education Director, BONARD

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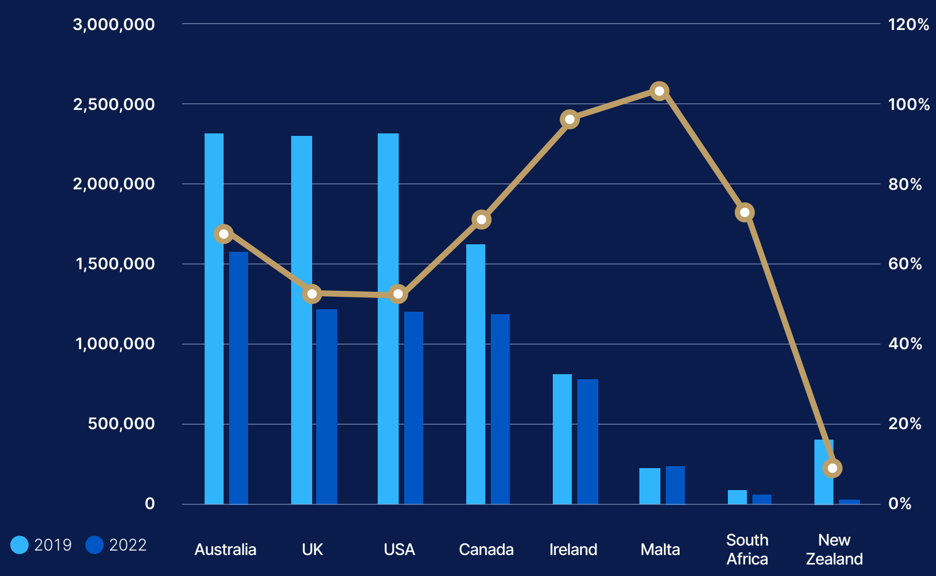
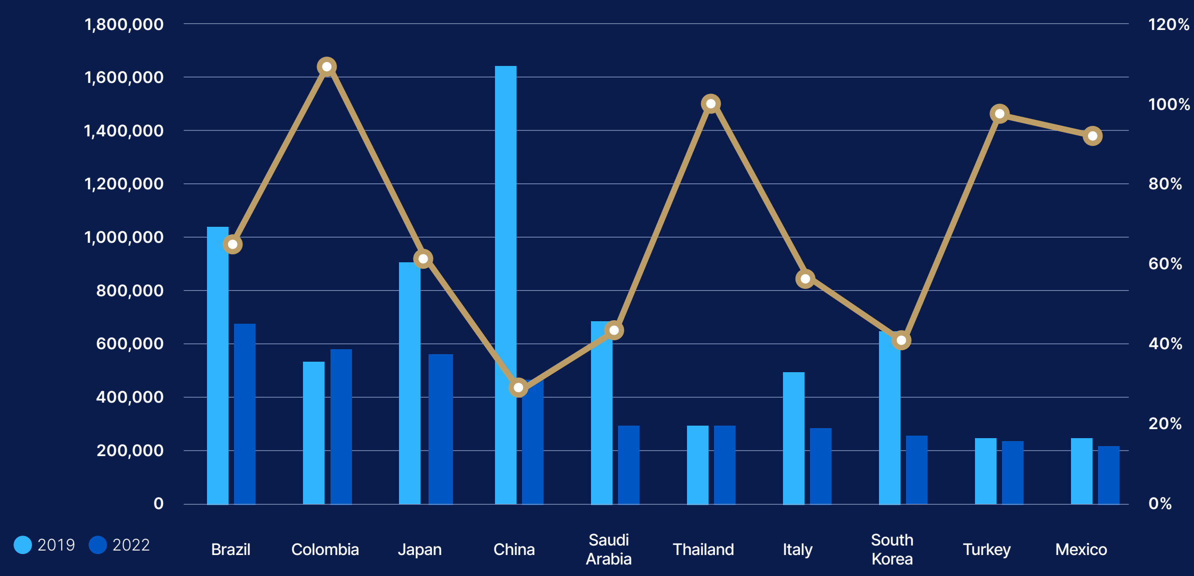
Market recovery by destination (2022 vs 2019) STUDENT WEEKS



	Australia	UK	USA	Canada	Ireland	Malta	South Africa	New Zealand
recovery 2022 vs 2019	68.2%	52.4%	52.9%	73%	97%	103.9%	71.6%	9.3%

SOURCE: BONARD, 2023; EduSA, English Australia, English New Zealand, English UK, EnglishUSA, Institute of International Education, Languages Canada, Marketing English in Ireland, National Statistics Office Malta

Top 10 source markets globally and their recovery level (2022 vs 2019) STUDENT WEEKS



	Brazil	Colombia	Japan	China	Saudi Arabia	Thailand	Italy	South Korea	Turkey	Mexico
recovery 2022 vs 2019	65.1%	109.8%	62.2%	28.6%	43.5%	101%	57%	40.7%	97.3%	91.9%

SOURCE: BONARD, 2023; EduSA, English Australia, English New Zealand, English UK, EnglishUSA, Institute of International Education, Languages Canada, Marketing English in Ireland, National Statistics Office Malta

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.

Latin America showed the greatest rebound, recovering 87% of its 2019 student weeks in 2022. With the exception of Brazil, the largest markets in the region (Colombia, Chile, Argentina, Peru, and Ecuador) recorded impressive growth between 2021 and 2022 and fully recovered their 2019 market volume. Initial data for 2023 points to continued growth from the region, mostly to Australia and Canada.

Japan outperformed China to become the largest market in Asia. China dropped to the 4th spot as a result of travel restrictions, which were only removed in March. A rebound in group travel, in particular, is expected to be seen in summer 2024.

Italy lagged behind other EU markets in returning to the 'new normal'. The country only reached 57% of its pre-pandemic volume, which was far below the European average of 80%. Italy is the largest source market for junior (under-18) students.

Although the market has continued to gradually recover in 2023, it is still trailing other European markets and has not reached its pre-pandemic volumes.

Thailand exceeded its 2019 student weeks (with Australia being the largest beneficiary) and cemented its position as the 6th biggest market in the world.

Turkey posted impressive year-on-year growth, which resulted in a 97% market recovery. Strong demand for English abroad continued to translate into bookings throughout the first half of 2023.

Factors shaping recovery in 2023

We observed several key trends that have shaped the sector's recovery in 2023:

Slower Recovery in the Junior Market

The junior market has been recovering at a much slower pace than the adult market. Juniors started travelling again in 2022. As this demographic traditionally travels for shorter periods than adults, strong junior destinations, such as the UK, Ireland, and Malta, saw student numbers increase faster than student weeks. Full recovery of the junior segment is expected in 2023.

Lower Average Age of English Learners

English language learners are becoming younger, with the average age decreasing from 15–16 to 11–13. This will boost demand for high school exchanges and longer stays with an academic focus.

Extended Length of Stay

Across all destinations, but especially in Australia, the USA, and Canada, the length of stay has dramatically increased. This trend has emerged since the pandemic. With rising flight costs, students and their families are opting for longer stays, and it is unclear as yet whether this is a temporary shift or a long-term change.

Strong Recovery in Australia

Initial data from 2023 indicates that Australia already surpassed its 2019 figures in Q2. The UK is also anticipated to achieve full recovery.

Critical Role of Staff and Accommodation

Another crucial factor affecting the sector's recovery is staff and accommodation shortages:

- Accommodation shortages particularly impact the junior segment, potentially hindering its full recovery.
- Staff shortages have been an ongoing problem, exacerbated by the pandemic. Many staff members lost their jobs in 2020, and language schools have struggled to fill vacancies since then.

Sarah Verkinova, BONARD's Senior Research Manager, emphasises the need for the sector to review certain aspects:

> *It is crucial for the sector to review existing pay, working conditions, benefits, and career progression opportunities for teachers, in order to make the profession more attractive, as this will determine whether or not the sector will confidently grow and expand as it moves on from the pandemic years.*

Sarah Verkinova,
Senior Research Manager,
BONARD

These are essential steps to take to make the profession more appealing and ensure that the sector can confidently grow and expand as the pandemic recedes. While online learning has proven effective and scalable, it cannot replace a qualified workforce.

Moreover, given the trend towards younger English language learners, it is crucial to offer quality education tailored to an age group that may not thrive in an online-only environment.

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Visa Backlogs and Refusals

Visa delays and increased refusal rates influenced students' destination choices in 2022. Although these shifts are temporary and expected to normalise, they provide insights into the impact of policy and administrative issues on global student mobility.

Canada faced a visa processing problem in 2022, causing delays for students from LATAM countries. Given Canada's global popularity, and its particular appeal in LATAM, this hiccup led to a temporary shift whereby students chose Australia instead.

Similar obstacles have occurred in the past year, with high visa refusal rates affecting student flows. Notably, Turkey is facing challenges with UK visa refusals, while Nepal is encountering similar issues with Australia.

Emerging trends in the global ELT sector

Three significant trends are shaping English language education worldwide, and these trends will continue to influence the ELT sector well into 2023 and 2024. It is hard to predict the precise impact of these trends, but we can consider several potential scenarios based on the available evidence.

Improving Domestic English Language Education

In various source countries, the quality of in-country English language education is improving. This trend is essential and will have far-reaching consequences for the ELT industry: *"The standards of in-country provision of English language education have been improving across most source countries,"* comments BONARD Chief Intelligence Officer Patrik Pavlacic. *"This is certainly a trend that will have huge ramifications for the ELT industry. English language learners are getting younger, and students are becoming proficient in English earlier than ever before."*

While the trend towards students becoming proficient in English at a younger age is likely to impact sectors such as pathway and higher education, its initial effects will be felt within the ELT industry.

The trend of improved domestic English language education requires traditional English language teaching providers to adapt so they remain appealing to ELT students from abroad. They can do so by investing in the development of a unique and highly specialised education offer to ensure students can still find value in studying English abroad. As Patrik Pavlacic explains:

"This could involve connecting students with networking opportunities, professional development, and career prospects. Destinations where students have access to work opportunities may gain a competitive advantage in this changing landscape. However, work rights alone will not be enough. It will be essential to provide students with meaningful work opportunities that enhance their personal and professional growth and meet their individual goals."

Rise of Transnational Education

The industry will also need to harness transnational education (TNE) opportunities to thrive in this new landscape. As countries invest in improving their English language education provision, language schools and associations in traditional destinations will have a role to play in capacity building and teacher training. Transnational partnerships for English language education can be supported by government and sector organisations; however, individual language schools and education providers can also invest in their own initiatives.

"We are observing a rising interest in launching branch campuses in Asia and the Middle East", notes Pavlacic.

"I believe the most business-savvy education providers are already planning to make the most out of TNE opportunities."

Strong demand for studying English in Asia

Lastly, intra-regional English student mobility within Asia continues to account for a siginificant proportion of students. Singapore, the Philippines and Malaysia have become established hubs for students from within the region seeking to improve their English. While comparable data data for these destinations is not available, Pavlacic indicates that ther is strong evidence suggesting their growth.

From industry stakeholder conversations, we gauge that the Philippines has already recovered its pre-pandemic market volume. These destinations will continue to play an important role in the near future. Precise intelligence will allow us to gather a more accurate picture of the global ELT industry, which cannot be complete if we do not take these destinations into account.

In summary, these trends indicate a shifting landscape within the ELT industry, with significant implications for education providers, students, and industry stakeholders. Adapting to these changes and capitalising on opportunities, such as TNE partnerships and the creation of unique educational offerings, will be crucial for the sector's growth and success.

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Patrik Pavlacic,
Chief Intelligence Officer,
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