

GLOBAL ELT OVERVIEW

THE UK IN THE GLOBAL CONTEXT

In 2024, the eight major ELT destinations—Australia, Canada, Ireland, Malta, New Zealand, South Africa, the UK and the US—collectively welcomed 1 million students. Together, these students generated 7.6 million student weeks.

By 2024, the global ELT sector had regained 73% of its 2019 student volume and 75% of its student weeks, compared to the pre-pandemic totals of 1.4 million students and 10 million student weeks.

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.

Despite a decline in student numbers, the UK remained the leading ELT destination, welcoming the highest number of

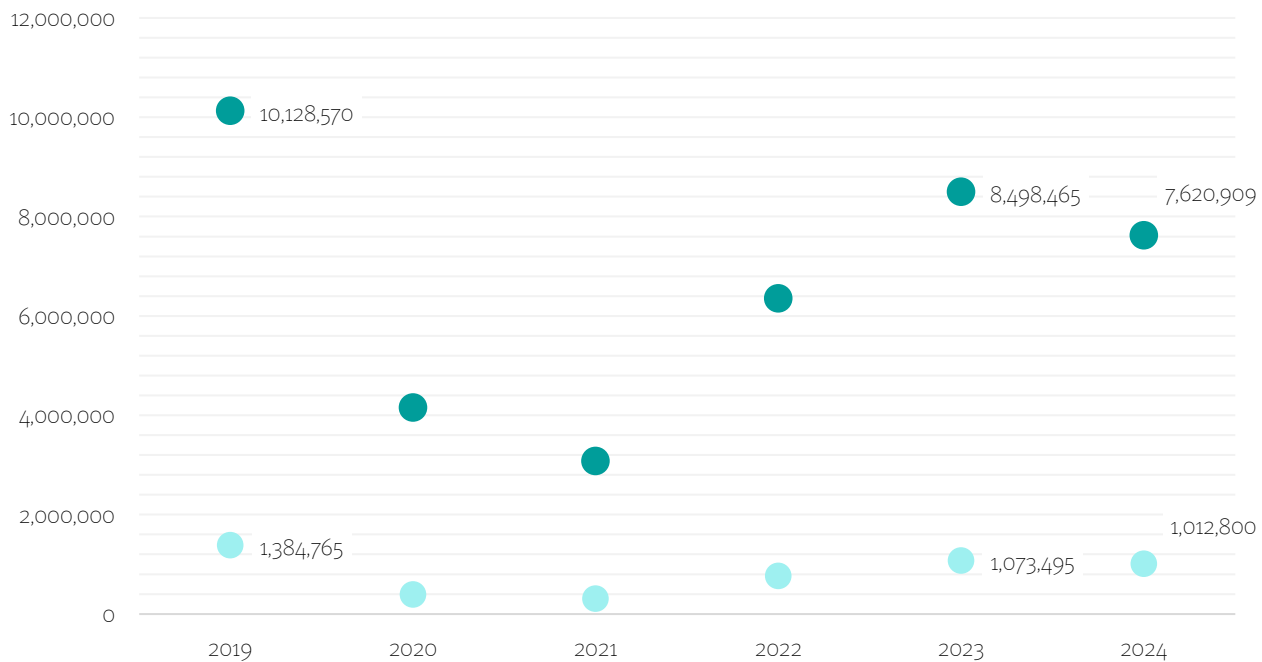
students and accounting for 38% of the overall market share. This was driven by its strong junior segment, giving the UK the highest junior-to-adult ratio (62% to 38%) among all destinations.

For the third consecutive year, Australia recorded the highest number of student weeks spent, retaining the top spot despite high visa refusal rates.

On the source side, Brazil overtook Colombia as the largest market in 2024. While Brazilian numbers fell by 14%, Colombia saw a sharper drop of 28% due to high visa fees and low approval rates in Australia. Still, Colombia and Mexico remained the only top 10 markets to have fully recovered to 2019 levels.

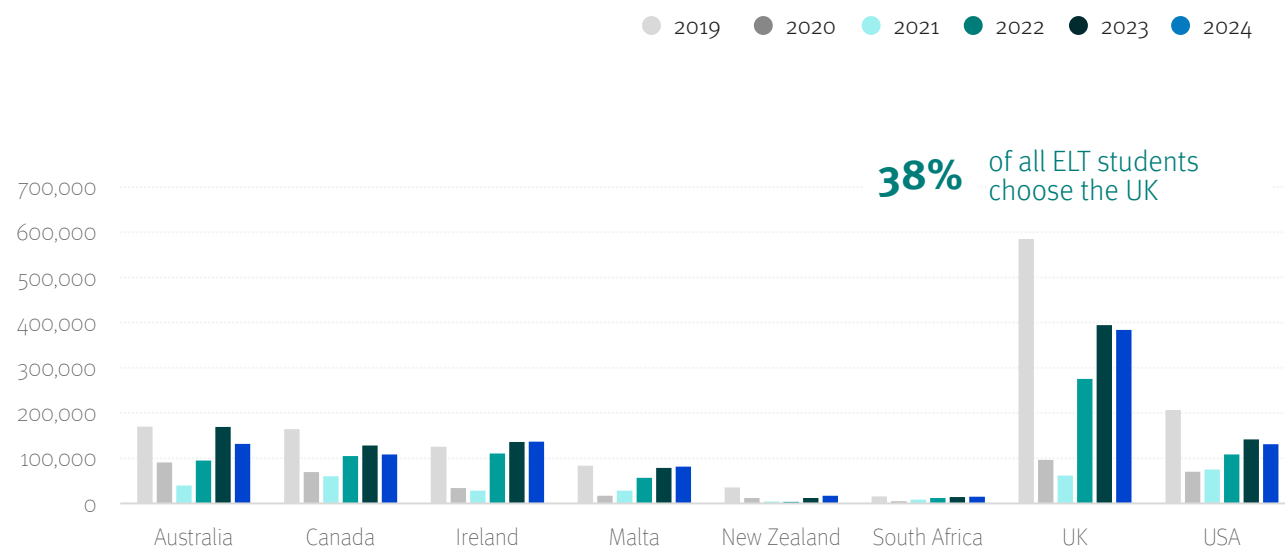
Total number of students and student weeks spent in major English language destinations

● Student weeks ● Student numbers



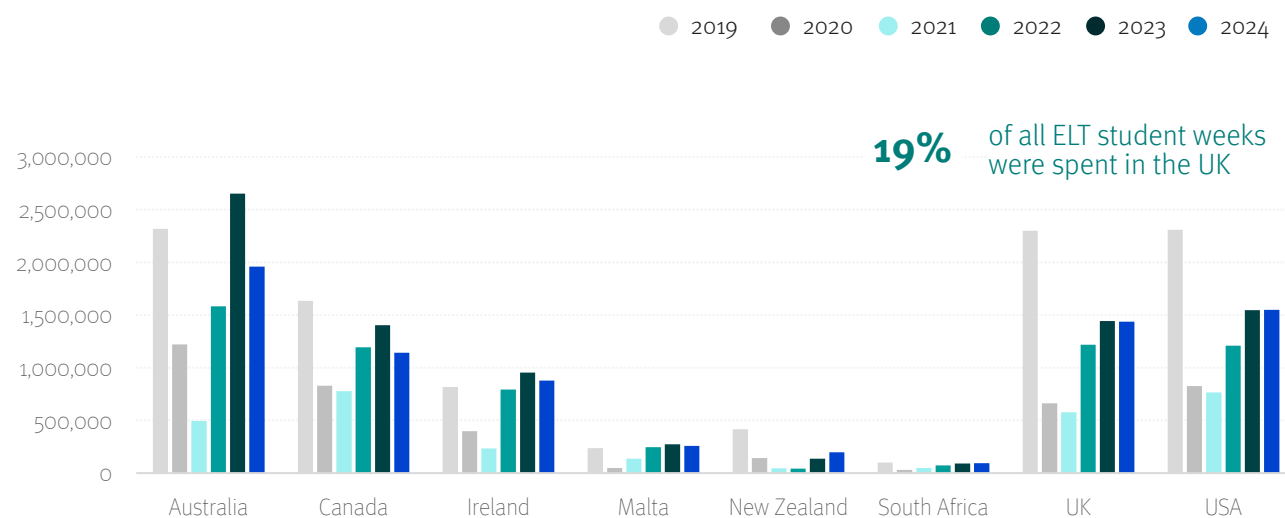
Source: BONARD, 2025; EduSA, 2024; English Australia, 2024; English New Zealand, 2024; English UK, 2024; English USA, 2024; Institute of International Education, 2024; Languages Canada, 2024; Marketing English in Ireland, 2024; NSO Malta, 2024;

English language students by destination



Source: BONARD, 2025; Figures represent extrapolations based on multiple sources. They cover all centres in the destinations and represent the best possible calculation, rather than a headcount. Moreover, the 2022 data for the USA are not directly comparable with previous years.

Student weeks by destination



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