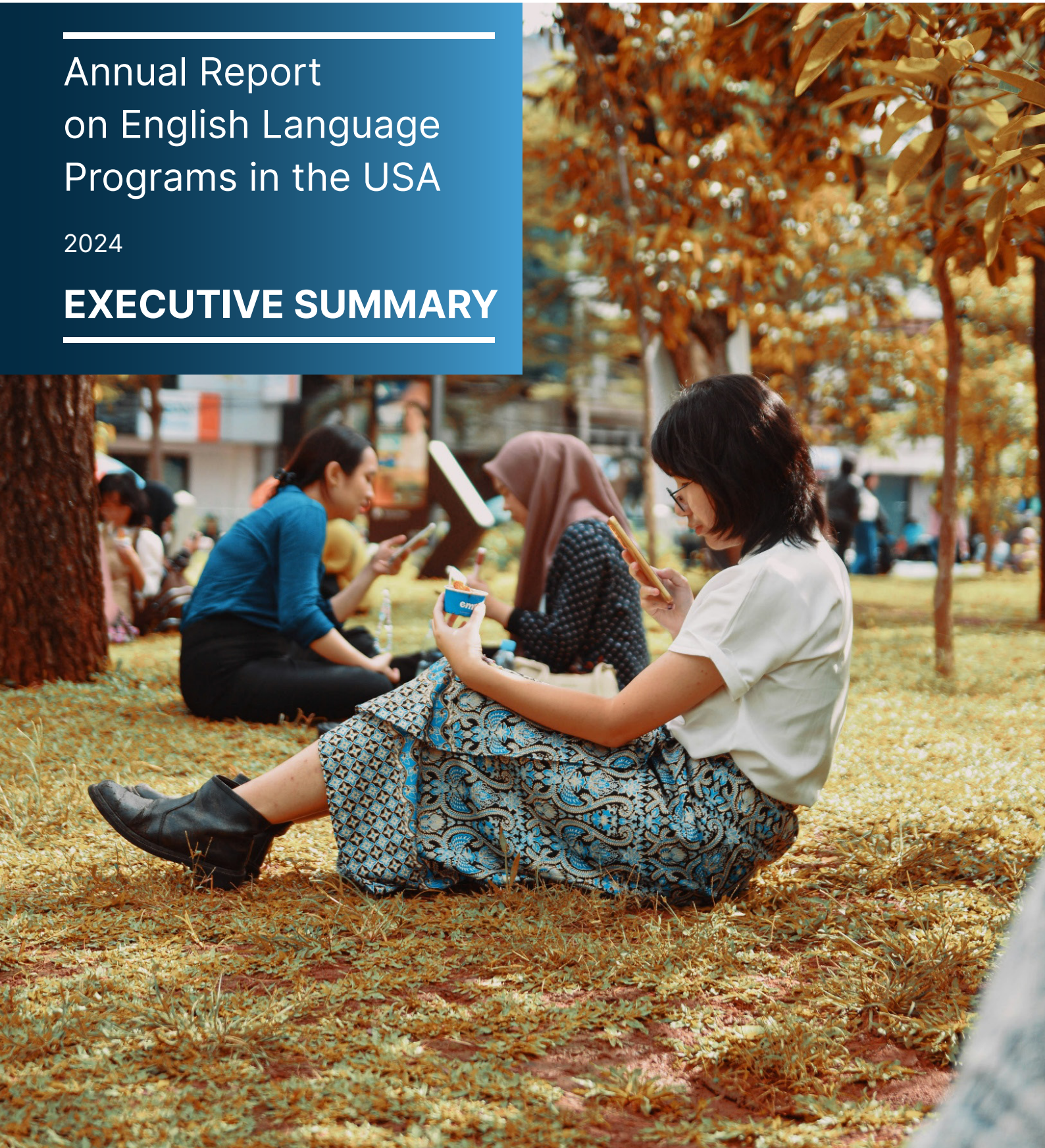


Annual Report on English Language Programs in the USA

2024

EXECUTIVE SUMMARY



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Foreword

Dear Members and Colleagues,

It is with great pride that we present the third Annual Report on English Language Programs in the United States. This year's report continues to build on our commitment to delivering transparent, reliable, and comprehensive data for the English language program (ELP) sector, serving as a vital resource for our members and the broader international education community.

The 2025 edition reflects the continued dedication of our sector, with robust participation from EnglishUSA member programs as well as non-members across the country. This collective effort has enabled us to provide deeper year-on-year comparisons and trend analyses, offering valuable insights into the evolving landscape of English language education in the U.S.

This report is more than a collection of numbers—it is a tool for advocacy, strategic planning, and community building. The data informs our ongoing efforts to address challenges such as visa

processing delays and to advocate for greater transparency and support at all levels. It has also promoted a more nuanced and data-driven view of our field nationally. By benchmarking the U.S. ELP sector against global peers, we equip our programs to make informed decisions and to strengthen their advocacy with campus leaders, community stakeholders, and policymakers.

We are grateful for the collaborative spirit that defines our industry. The engagement and support of our programs, associates, and partners have been instrumental in advancing our shared mission. Your participation ensures that we remain a united and resilient community, committed to fostering opportunity and inclusion through English language education.

On behalf of the EnglishUSA Board of Directors, thank you for your continued commitment and for making this report possible. Together, we look forward to another year of growth, innovation, and impact.

Sincerely,

Cheryl Delk-Le Good
Executive Director
EnglishUSA



Introduction

The third edition of the Annual Report on English Language Programs offers a comprehensive overview of the industry's performance in the USA in 2024. Expanding upon the insights from previous years, this report offers a thorough analysis of the industry along with historical comparisons that help identify emerging markets and trends.

In 2024, 349 English language programs (ELPs) across the USA participated in the survey, including private language schools, universities, colleges, and community colleges, with representation from 48 states. The data provided by these programs enabled BONARD to conduct a thorough and in-depth analysis of the sector, creating a robust evidence base to inform future strategic planning and marketing efforts for all providers.

The 2024 edition of this report continues to expand on the metrics and features presented in previous years and introduce new types of breakdowns. This year's report includes fresh sections on the breakdown of nationalities by top states and an analysis of nationality distribution by visa types.

As the industry faced challenges, old and new, in 2024, such as difficulties with visa approvals, the rise of new ELT destinations, and the impact of elections, having access to detailed market insights has never been more crucial. While the USA remains a popular destination for international students, it is essential that stakeholders make informed decisions on the basis of data-driven insights to stay ahead in an ever-evolving sector.

Data collection took place between February and March 2025.



The project has introduced an internationally recognized and reliable market measurement that reflects the current state of the English language sector in the USA. This is a three-year initiative to generate transparent and accurate data for decision-making and the strategic development of the sector.

This year's report provides market intelligence in the following areas:

- Global overview;
- Overall student numbers and student weeks;
- Year-on-year comparisons and analysis;
- Average course duration;
- Student numbers by provider type;
- Student numbers by nationality and course type;
- Student numbers by age group;
- Student numbers by state;
- Student numbers by recruitment channel;
- Student numbers by advertising channel;
- Student numbers by visa type;
- Student numbers by course type;
- Student numbers by accommodation type;
- Average tuition fees;
- Economic impact of ELPs;
- Additional student spending.

The report provides intelligence the following ELPs:

Private (independent or multi-site) centers: not affiliated with any specific university or college and may have multiple locations where they offer English as a Second Language (ESL) programs.
University-governed centers: language education facilities directly overseen and operated by universities.
College-governed centers: language education establishments managed and governed by colleges.
Community college-governed ESL centers: language education institutions under the jurisdiction of community colleges.
Other: ESL centers that do not fall into the above-mentioned classifications. These centers may have unique affiliations or specialized programs, or they may serve specific demographics.

In future editions, BONARD and EnglishUSA will continue to refine their reporting to meet the evolving needs of the sector. One of the key objectives is to incorporate feedback to further enhance the competitiveness of ELPs.

Executive Summary



Global Overview

According to the latest data, BONARD predicts that around **1 million students** enrolled in an English language course across the eight major destinations in 2024 (Australia, Canada, Ireland, Malta, New Zealand, South Africa, the UK, and the USA). BONARD anticipates that in 2024 the global English language teaching sector likely recovered **70-75% of its 2019 student volume**.

The **USA is expected to rank as the fourth most popular destination for English language learners in 2024**. The USA hosted 10-15% of all ELT students.

Market Size

In total, the responding programs taught **66,632 English language students** in 2024 generating **854,443 student weeks**.

The average course duration stood at **12.8 weeks**, ranging from 3.2 weeks among providers categorized as other to 24.2 weeks at community colleges.

ELPs in the USA

As of 2024, the research recorded **833 active ELPs in the USA** (programs teaching English to international students). While some programs ceased their operations (at universities, but also private programs), others, mainly private multi-site programs opened schools at new locations.

A total of **349 ELPs participated** in this research project. Among these, **199 were EnglishUSA members** (57%), and **150 were non-members** (43%), highlighting sustained and widespread engagement across the sector.

Adult students comprised 90% of the total English language student population, with **juniors (under 18s) accounted for the remaining 10%**.

California was the most popular destination for adult students, attracting 27% of them as well as one quarter of juniors.

Top Locations (2024)

Rank	State	Student numbers
1	California	13,596
2	New York	12,383
3	Massachusetts	5,506
4	Florida	5,455
5	Illinois	4,650

Preferred Course Types

- General/Intensive English: **53%**
- Short-term summer/winter English programs: **17%**
- English for Academic Purposes (EAP): **15%**
- Pathway program (degree and ESL classes): **7%**

Visas

The majority of students (56%) studied on **F-1 visas**. The second largest group (17%) **comprised ESTA recipients** who do not require a visa to study English in the USA. **B-1/B-2 Visitor Visa holders** represented 10% of student population. A full visa overview is available in the report.

Economic Impact

International students spent an average of **\$388 per week** on tuition. Additional costs, including accommodation, food, and transportation, averaged **\$754 per week**.

This brought the total average weekly expenditure to **\$1,142**, amounting to **\$14,615** for the duration of a typical 12.8-week course.

Top Source Countries (2024)

Rank	Source country	Student numbers
1	Japan	9,731
2	China	6,304
3	Brazil	5,600
4	Colombia	3,917
5	South Korea	3,840

Preferred Recruitment Channels

- Direct bookings with providers: **44%**
- Education agency or aggregator: **33%**
- Institutional agreements: **12%**
- Government scholarships: **6%**

Challenges

In 2024, 61% of ELPs, identified **student visa denials** as the most pressing challenge. **Low enrollments** were cited by 53% of respondents as the second most significant problem due to their impact on recruitment budgets. **International competition from other study destinations** ranked third, reported by 37% of respondents.

The direct economic contribution of English language students at participating programs was valued at **\$950 million**.

When extrapolated to include all ELPs across the USA, the total direct contribution of these students to the US economy is estimated to have exceeded **\$1.7 billion**.

Annual Report of English Language Programs in the USA

2024

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