

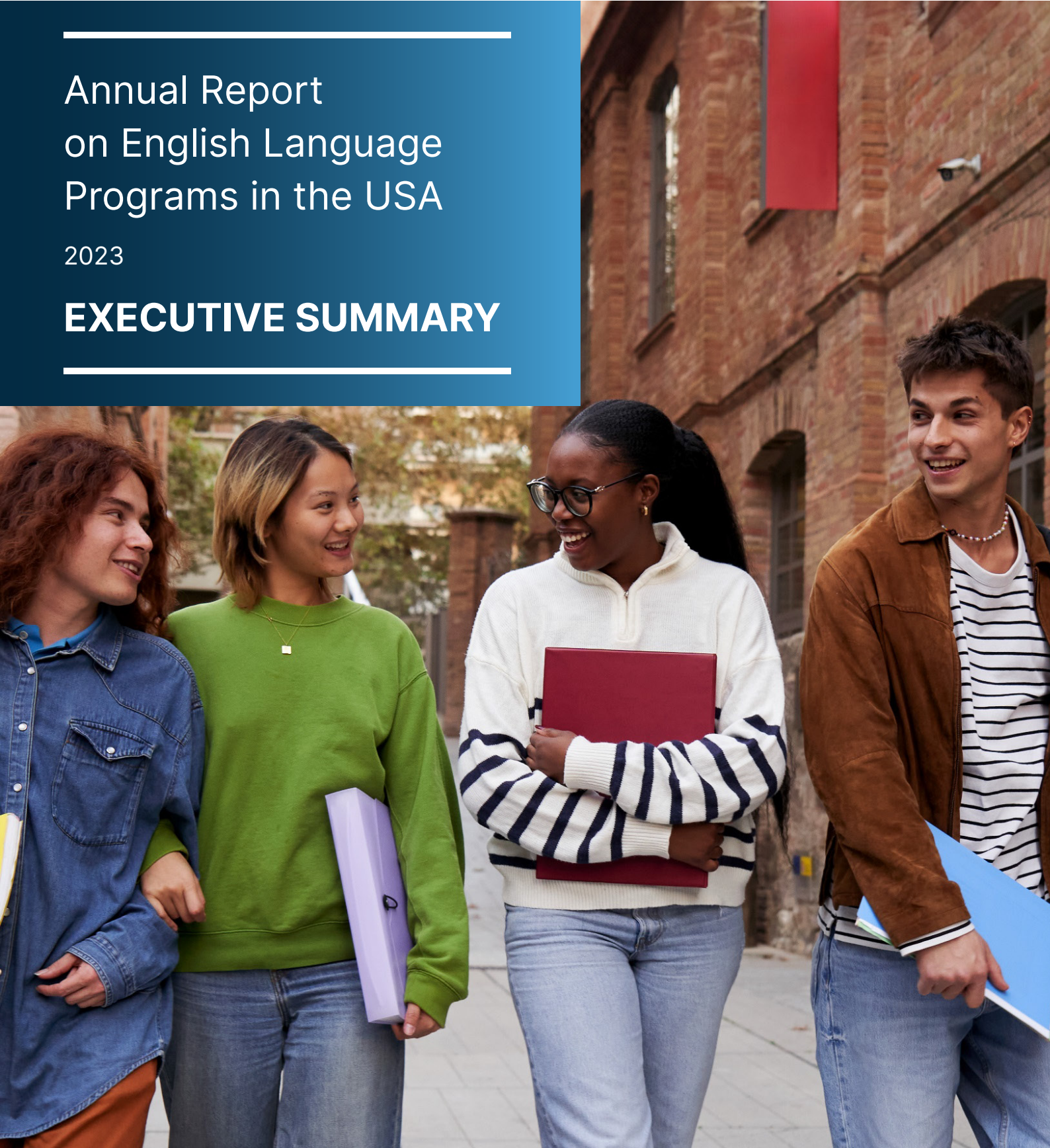
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# Annual Report on English Language Programs in the USA

2023

## EXECUTIVE SUMMARY

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## Table of Contents

|    |  |
|----|--|
| 04 | Foreword                                 |
| 05 | Introduction                             |
| 06 | Executive Summary                        |
| 08 | Global Overview                          |
| 09 | English Language Programs in the USA     |
| 10 | Market Overview                          |
| 13 | Source Regions                           |
| 14 | Source Countries                         |
| 16 | Top 10 Source Countries by Provider Type |
| 18 | Age Segments                             |
| 20 | Course Types                             |
| 24 | Recruitment Channels                     |
| 25 | Advertising Channels                     |
| 26 | Visas                                    |
| 27 | Visa Refusals                            |
| 28 | Visa Refusal Mitigation                  |
| 29 | Challenges                               |
| 30 | Average Tuition                          |
| 31 | Economic Impact                          |
| 32 | Accommodation                            |
| 33 | Appendix 1: Respondent Profile           |
| 34 | Appendix 2: Glossary                     |

# Foreword

Dear Members and Readers,

EnglishUSA is proud to present our second Annual Report on English Language Programs in the United States. Building on the foundation laid last year, this report continues our commitment to providing comprehensive data on the English language program (ELP) sector. We had nearly 90% of our EnglishUSA member programs responding in addition to other non-member programs, demonstrating the commitment to and importance of this data collection.

Our inaugural report marked a significant milestone as the first industry-driven dataset of its kind. This year, there are more nuanced year-to-year comparisons and trend analyses. These insights are invaluable as we continue to benchmark the United States' global market share in the ELP industry against other leading English language training destinations.

The data from this sector-specific report is instrumental in strengthening national advocacy efforts, particularly with EnglishUSA's efforts and call for transparency in visa processing

delays and refusals. EnglishUSA will use these insights to better represent the ELP sector to government agencies and peer international education associations and coalition partners. The report supports our membership and the entire English language program community as they advocate for their programs and students at the campus, community, and state levels.

As we reflect on the past year and look ahead, we remain committed to fostering our community of English language programs, Associates, partner agencies, and strategic partners and affiliates. The collaborative spirit that defines our industry has only grown stronger, and we're grateful for the continued participation and support from all our programs, for which we will continue to call upon.

Your engagement with this report and our initiatives demonstrate that we are indeed stronger together. The EnglishUSA Board of Directors and I extend our deepest appreciation to everyone who has contributed to the success of this second annual report.



Cheryl Delk-Le Good  
Executive Director  
EnglishUSA

# Introduction

The second edition of the Annual Report on English Language Programs offers a comprehensive overview of the industry's performance in the USA in 2023. Building on the foundation laid last year, the report provides an in-depth analysis of the sector and an overview of historical comparisons, which serve as a tool for identifying emerging markets and trends.

This year, 366 English language programs across the USA participated in the survey, including private language schools, universities, colleges, and community colleges. Forty-seven states were represented. Thanks to the data provided by these programs, BONARD was able to conduct a more comprehensive analysis of the sector, producing a solid evidence base to support future strategic planning and marketing activities for all providers.

This report builds on the metrics and features presented in 2022 and introduces new types of analyses and more detailed breakdowns. Readers will encounter new sections on a variety of topics, such as: advertising channels, accommodation, and visa refusals by source country. Additionally, taking into account the sector's feedback, the 2023 annual report introduces and analyzes course type popularity by student nationality. With the industry evolving and constantly adapting to new trends and regulations, having access to granular market insights is essential for product development and targeted student recruitment.

Data collection was carried out between February and April 2024.



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



Initiated by EnglishUSA and developed by BONARD, this report documents the state of the ELP sector in the USA in 2023.

This comprehensive resource offers new metrics and international perspectives designed to deepen understanding of the ELP sector and assist in planning student recruitment strategies.

## Global Overview

According to the latest available global data, **1.1 million students** took an English language course in one of the eight major destinations in 2023 (Australia, Canada, Ireland, Malta, New Zealand, South Africa, the UK, and the USA). BONARD calculated that, in 2023, the global English language teaching sector recovered **77% of its 2019 student numbers**.

The **USA ranked as the third most popular destination for English language learners**, behind the UK and Australia. The USA welcomed 13% of all ELT students.

## Market Size

Overall, the responding programs taught **97,813 English language students**, who generated **1,042,485 student weeks** in 2023.

The average course duration was **10.7 weeks**, spanning from 9.1 weeks for private providers to 12.6 weeks for universities.

## ELPs in the USA

The research identified **827 active ELPs in the USA** (programs teaching English to international students). It should be noted that the increase in the number of programs was mostly fueled by post-covid school reopenings and an increase in the number of community college-governed providers.

A total of **366 ELPs took part** in this research project. Among these, **221 were EnglishUSA members** (60%), and **145 were non-members** (40%), demonstrating significant nationwide industry participation.

**Adult students made up 81%** of the total English language student population, with **juniors (under 18s) accounting for the remaining 19%**.

New York was the most popular state for adult students, attracting 27% of them. A third of juniors opted for California.

## Top Locations (2023)

| Rank | State         | Student numbers |
|------|---------------|-----------------|
| 1    | New York      | 27,966          |
| 2    | California    | 23,232          |
| 3    | Florida       | 8,174           |
| 4    | Massachusetts | 7,364           |
| 5    | Hawaii        | 3,267           |

## Top Source Countries (2023)

| Rank | Source Country | Student numbers |
|------|----------------|-----------------|
| 1    | Japan          | 13,849          |
| 2    | France         | 6,759           |
| 3    | Brazil         | 6,219           |
| 4    | China          | 5,845           |
| 5    | Italy          | 4,653           |

## Preferred Course Types

- General/Intensive English: **55%**
- Short-term summer/winter English programs: **26%**
- English for Academic Purposes (EAP): **13%**
- Pathway program (degree and ESL classes): **3%**

## Preferred Recruitment Channels

- Direct bookings with providers: **62%**
- Education agency or aggregator: **23%**
- Institutional agreements: **6%**
- Government scholarships: **4%**

## Visas

The majority of students (54%) studied on **F-1 visas**. The second largest group (19%) **consisted of ESTA recipients** who do not require a visa to study English in the USA. **B-1/B-2 Visitor Visa holders** and **US citizens** and residents accounted for 8% of student numbers each. A full visa overview is available in the report.

## Challenges

According to 64% of ELPs, **student visa denials** were the most pressing challenge in 2023. Fifty-five percent of respondents said that **low enrollments affected their recruitment budget**, making this the second most significant problem for the sector. **Difficulty in hiring and retaining qualified staff** was the third most important challenge, being reported by 34% of respondents.

## Economic Impact

International students paid an average of **\$348 a week** on tuition. Additional expenses, including accommodation, food, and transportation, averaged **\$746 per week**.

The direct economic contribution of English language students at participating programs was valued at **\$1.2 billion**.

The combined average weekly expenditure for one student was **\$1,130**, amounting to **\$12,091** for their entire stay in the USA (based on the average course duration of 10.7 weeks).

By extrapolating these figures to include all US ELPs, it is estimated that the total direct contribution of English language students to the US economy exceeded **\$1.7 billion**.

# Annual Report of English Language Programs in the USA

## 2023

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