Annual Report on English Language Programs in the USA

2022

Executive summary

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Foreword

Dear Members and Readers,

EnglishUSA takes great pride in presenting its inaugural Annual Report on English Language Programs in the United States. For many years, the need for more comprehensive data in the post-secondary English language program (ELP) sector has been acknowledged by ELP professionals, their associations, and policymakers.

This dataset, the first driven by the industry itself, will pave the way for a future holistic data collection model, allowing the United States to benchmark its global market share of the ELP industry against other leading destinations like the UK, Canada, Australia, and New Zealand.

EnglishUSA is deeply committed to collaboration; our strength as an association lies in our collective efforts. We have embarked on this journey with a collaborative effort alongside BONARD to gather enhanced data that will help our industry better understand the needs of potential students abroad. The partnership with BONARD, known for its successful IEP enrollment data collection efforts in other countries, ensures that we will develop an internationally recognized standard data set tailored to meet the industry's specific needs.

This data will complement the IIE IEP Open Doors annual reports and SEVIS by the Numbers reports by providing additional enrollment details on age groups, student sources, course types, visa types, and more.

The insights provided in this report will also strengthen our advocacy efforts, enabling EnglishUSA to better represent and support its membership and the entire English language program community.

Partial funding for this data collection and report is possible with the Department of Commerce, International Trade Administration Market Development Cooperator Program (MDCP) grant that EnglishUSA received in October 2022. The MDCP project "Promoting and Supporting English Language Programs (PASELS)" comprises several initiatives, with this enhanced data collection in place to inform future endeavors.

PASELS demonstrates EnglishUSA's commitment to rebuilding the U.S. capacity to host English language students and to enhancing our competitiveness in the global ELP industry, with a preliminary focus in Latin America. Through these initiatives, EnglishUSA aims to increase the visibility of U.S.-based English language programs in targeted markets and emphasize the industry's significance within the broader field of international education and exports.

Looking back and ahead, we remain devoted to building and nurturing our community of English language programs, Associates, partner agencies, and strategic partners and affiliates. Our strength lies in unity and collaboration, and we express our sincere gratitude to all the programs that participated in this inaugural report. Your success is our success, and we are stronger together.

The EnglishUSA Board of Directors and I extend heartfelt appreciation to everyone involved in making this report a reality.

Cheryl Delk-Le Good
Executive Director
EnglishUSA

For inquiries regarding EnglishUSA membership, please contact info@englishusa.org.

Executive Summary

Initiated by EnglishUSA and developed by BONARD, this report documents the state of the ELP sector in the USA in 2022.

This comprehensive resource features a range of new metrics and international perspectives that will deepen the understanding of the ELP sector and navigate international student recruitment.

Global Overview

Pre-pandemic, **1.4 million international students learned English in one of the eight major destinations in the world** (Australia, Canada, Ireland, Malta, New Zealand, South Africa, the UK, and the USA).

By the end of 2022, the global English language travel sector had recovered **65%–70% of its 2019 levels**.

The **USA is currently the 3rd most popular destination** globally.

ELPs in the USA

The research identified over **750 active English language programs in the USA** (programs teaching English to international students).

A total of **289 English language programs participated** in this research project.

Of these, **175 were EnglishUSA members** (61%), and **114 were non-member programs** (39%), which reveals the high industry engagement across the country.

Market Size

Cumulatively, the responding programs taught **70,579 English language students for a total of 714,043 student weeks**.

On average, **students spent 10.1 weeks** studying an English language program. Specifically, those attending private programs studied for an average of 8.6 weeks, while those at universities enrolled for 12.8 weeks.

Adult students constituted 84% of the total English language student population, while **juniors made up 16%** of the cohort.

California emerged as the preferred state for adult students, accounting for 22% of the entire adult student body, while New York attracted the highest share of junior students (36%).

Top Locations

Rank	State	Student numbers
1	New York	16,636
2	California	16,160
3	Florida	7,831
4	Massachusetts	5,294
5	Hawaii	3,440

Top Source Countries

Rank	Source Country	Student numbers
1	Japan	8,694
2	France	6,069
3	China	4,884
4	Colombia	4,020
5	Brazil	3,883

Preferred Course Types

- General/Intensive English: **57%**
- EAP/University Preparation (non-credit): **14%**
- Short-term summer English programs: **9%**
- English for Specific Purposes: **4%**

Preferred Recruitment Channels

- Direct bookings with providers: **45%**
- Education agency or aggregator: **25%**
- Word of mouth: **12%**
- Institutional agreements: **10%**

Visas

The majority of students (62%) studied on **F-1 visas**. The second largest group of students (25%) **did not require a visa** to study English in the USA (e.g., ESTA recipients, citizens, residents, asylum seekers). The third most popular option was to enroll on a **B-1 Visitor Visa** (6%).

Challenges

According to 67% of English language programs, **student visa denials** were the most pressing challenge in 2022. The second most impactful challenges were the **lingering effects of Covid-19** and **visa processing times** (both mentioned by 50% of respondents).

Economic Impact

International students paid, on average, **$385 per week** for tuition. Additional expenses (accommodation, food, transportation, etc.) amounted to **$674 per week**.

The combined average expenditure of one student equaled **$1,059 per week and $10,696 for their entire stay** in the USA (considering the average course duration of 10.1 weeks).

The direct economic contribution of English language students at the responding programs was valued at **$0.8 billion**.

Extrapolating the figures over the entire pool of U.S. English language programs, it is estimated that the total direct contribution of English language students to the U.S. economy exceeded **$1 billion**.

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